PeopleSoft®

PeopleSoft Enterprise Sales 8.9 PeopleBook

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PeopleSoft Enterprise Sales 8.9 PeopleBook
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Using Forecasts

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About This PeopleBook

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

This preface discusses:

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

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

PeopleSoft Application Prerequisites

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

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

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

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

PeopleSoft Application Fundamentals

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

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

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Ordering Printed Documentation

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

- Web
- Telephone
- Email

Web

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

Telephone

Contact MMA Partners at 877 588 2525.

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

See Also

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

See *About These PeopleBooks,* "ISO Country and Currency Codes," ISO Country Codes.

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

See Appendix C, “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.

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PeopleSoft Sales Preface

This preface discusses:

- PeopleSoft CRM application fundamentals.
- PeopleSoft CRM automation and configuration tools.
- PeopleTools PeopleBook.

Note. All information found in this PeopleBook is applicable to PeopleSoft CRM for High Technology.

PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise Sales 8.9 PeopleBook* provides implementation and processing information for your PeopleSoft Sales application. However, additional essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft CRM 8.9 Application Fundamentals PeopleBook.* Each PeopleSoft product line has its own version of this documentation.

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

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

- CRM Multi-Product Foundation.

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

  This part discusses how to administer workers who perform tasks such as support or field service in PeopleSoft CRM. It includes information on competency management and assigning workers to tasks.
- Interactions and 360-Degree Views.

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

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

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

  This part discusses setting up agreements and warranties.
- SmartViews

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

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook

PeopleSoft CRM Automation and Configuration Tools

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

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

- Correspondence management.

  This part discusses manual notifications and correspondence requests.

- Automation tools.

  This part discusses PeopleSoft CRM workflow, component event processing, business projects, and scripts.

- Configuration tools.

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

- Knowledge management.

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

PeopleTools PeopleBooks

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

PART 1

Setting Up PeopleSoft Sales

CHAPTER 1

Getting Started with PeopleSoft Enterprise Sales

This chapter provides an overview of PeopleSoft Enterprise Sales and discusses:

- PeopleSoft Enterprise Sales integrations.
- PeopleSoft Enterprise Sales implementation.

PeopleSoft Enterprise Sales Overview

To drive profitable revenue growth, you need to align your sales strategy with customer needs and corporate objectives. This strategy must be supported by the territory and incentive structure, and requires real-time visibility across multiple channels to optimize your sales processes in response to market changes. You also need to ensure that your sales force has the right capabilities and tools to execute the strategic plan. PeopleSoft Sales helps you to:

- Leverage the right channels, resources, and offerings to differentiate and win against the competition.
- Motivate and track sales performance using metrics-driven planning and compensation tools.
- Increase operational efficiency by integrating sales processes across the enterprise.
- Extend your sales reach through partners and other channels.
- Maximize sales productivity and build profitable, loyal customer relationships.

PeopleSoft Sales is an application that enables you to enter, assign, and track sales leads and opportunities. After you have entered sales opportunities into your database, you can view your opportunity pipeline and generate forecasts to manage your sales efforts successfully.

With this application, you can:

- Define a territory tree that represents the sales organization.
- Create or import sales leads.
- Convert a lead to an opportunity.
- Create sales opportunities.
- Assign a lead or opportunity to a sales representative by using the territory tree.
- Include opportunities in sales forecasts.
- Roll up forecasts in the territory tree.

PeopleSoft Enterprise Sales Integrations

PeopleSoft Enterprise Sales integrates with these PeopleSoft applications:

- PeopleSoft Order Capture.
- PeopleSoft Telemarketing.
- PeopleSoft Marketing.
- PeopleSoft Online Marketing.
- PeopleSoft Strategic Account Planning.
- PeopleSoft Mobile Sales.
- PeopleSoft Partner Sales.

We discuss integration considerations in the implementation chapters in this PeopleBook.

Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection website.

PeopleSoft Enterprise Sales Implementation

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

PeopleSoft Enterprise Sales also provides component interfaces to help you load data from your existing system into PeopleSoft Enterprise Sales tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

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

Component	Component Interface	Reference
Industry RSF_INDUSTRY	RSF_INDUSTRY_SCI	See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Defining Control Values for Business Objects,” Defining Industries.
Territory Node RSF_TERRITORY	RSF_TERRITORY_SCI	See Chapter 7, “Creating Territory Trees,” Creating or Editing Territories, page 89.
Sales Users RSF_SUSER	RSF_SUSER_SCI	See Chapter 3, “Setting Up Sales Security and Personalization,” Setting Up Sales Users, page 15.
Sales Team RSF_TEAM	RSF_TEAM_SCI	See Chapter 3, “Setting Up Sales Security and Personalization,” Setting Up Sales Teams, page 22.

Other Sources of Information

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

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “PeopleSoft Enterprise Customer Relationship Management Application Fundamentals Preface,” Additional Resources

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Component Interfaces

PeopleSoft Enterprise Setup Manager for Customer Relationship Management 8.9

CHAPTER 2

Setting Up Business Units for PeopleSoft Sales

This chapter provides an overview of business units in PeopleSoft Sales and discusses how to set up business units for PeopleSoft Sales.

Understanding Business Units in PeopleSoft Sales

Business units are used across the PeopleSoft product lines to define an organization for reporting purposes. Business units in PeopleSoft Sales might be defined by geographic location, product line, fulfillment center, or some other organization-specific guideline. The Sales business unit also provides a mechanism for defining defaults and processing controls used when creating leads and opportunities.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Working with Business Units and TableSet Controls”

Setting Up Business Units for PeopleSoft Sales

To set up business units for PeopleSoft Sales, use the Sales Definition component (RSF_BUS_UNIT_TBL).

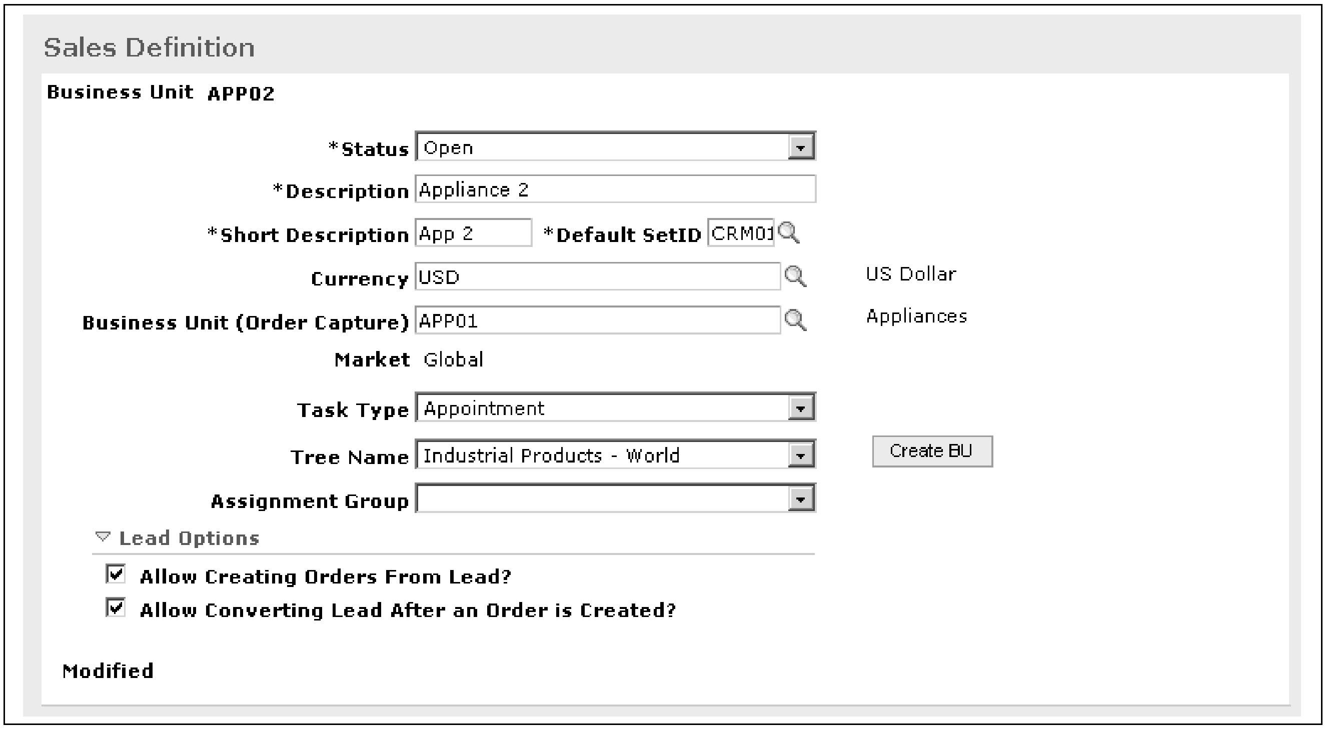
This section discusses how to create business unit definitions for PeopleSoft Sales.

Page Used to Set Up Business Units for PeopleSoft Sales

Page Name	Object Name	Navigation	Usage
Sales Definition	RSF_BUS_UNIT_TBL	Set Up CRM, Business Unit Related, Sales Definition	Create business unit definitions for PeopleSoft Sales.

Creating Business Unit Definitions for PeopleSoft Sales

Access the Sales Definition page.



Sales Definition page

Status — Select the business unit's status, either *Open* or *Closed.*

Default Set ID — Select the default set ID for the business unit. After you click the Create BU button, this field disappears.

Currency — Enter the currency to use as the business unit's default currency.

Business Unit (Order Capture) — Enter the PeopleSoft Order Capture business unit to use with the PeopleSoft Sales business unit if you have also licensed the Order Capture product. The Order Capture business unit defined here is defaulted onto the quotes and orders that are generated when a lead or opportunity is converted to a quote or order.

Note. In addition to entering the PeopleSoft Order Capture business unit, you must specify the third-party tax vendor (such as Taxware, Vertex, or WorldTax) on the Order Capture Business Unit Definition page. If you don't specify a tax vendor for the Order Capture business unit, no tax calculations can be included in quotes and orders.

Market — By default, the Market field is preset to *Global.* You cannot change this value.

Task Type — Select the type of task to use as the default task for the business unit. When creating a task from the Lead or Opportunity components, the task type defined here is defaulted for you.

Tree Name — Select the territory tree name to use as the default territory tree for the business unit.

See Chapter 7, "Creating Territory Trees," page 85.

Create BU (create business unit) — Click this button to create the Sales business unit.

Assignment Group

Select the assignment group to use as the default assignment group for the business unit. You must click the Create BU button before you can select the assignment group.

See Chapter 6, “Configuring Assignment Criteria,” Creating Assignment Groups, page 78.

Lead Options

Allow Creating Orders From Lead?

Select to enable users to create orders from leads that belong to the business unit. When cleared, users cannot create orders from leads associated with the business unit. Depending on whether your organization has a short or long sales cycle, use this flag to control whether you can use a lead to create an order before converting the lead to an opportunity, or without converting the lead to an opportunity.

Allow Converting Lead After Order is Placed?

Select to enable users to convert leads in the business unit to opportunities, even if an order has been placed. When cleared, users cannot convert the business unit’s leads to opportunities after an order has been placed.

CHAPTER 3

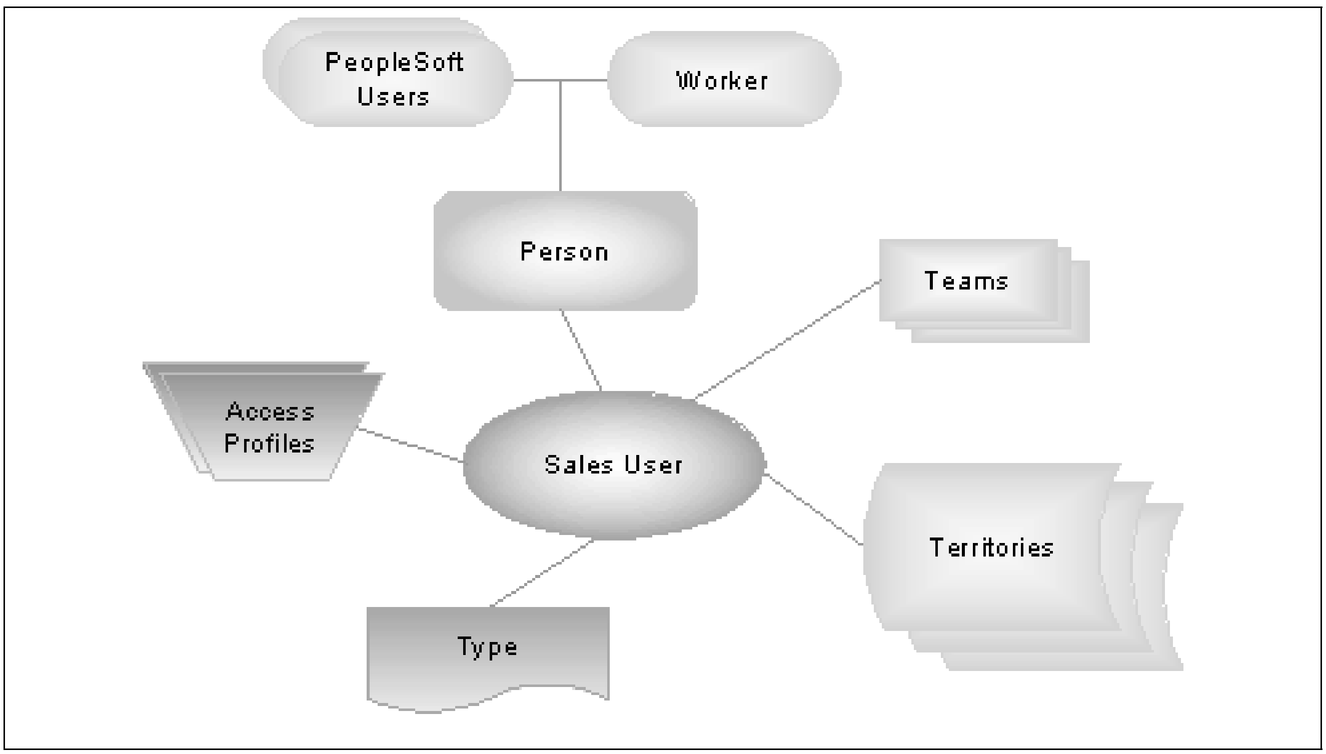
Setting Up Sales Security and Personalization

This chapter provides an overview of sales users and discusses how to:

- Set up sales access profiles.
- Set up sales users.
- Set up sales teams.
- Set up functional options.

Understanding Sales Users

PeopleSoft Sales users include sales people, sales managers, sales product managers, administrators, technical support staff, other members of your organization, and partners.



Sales users

To enable someone to use PeopleSoft Sales, create the individual in your system:

- PeopleSoft User

An individual must exist in your system as a PeopleSoft user with a user ID, which you set up in PeopleTools.

- Person

  Access the Contact link by clicking Customers CRM and create the individual as a PeopleSoft Customer Relationship Management (PeopleSoft CRM) contact with a person ID. Set the contact flag to *Internal* for employees and to *External* for partners and consultants.

  If you have PeopleSoft Partner Relationship Management, you can set up partners in that application.

  See *PeopleSoft Enterprise CRM 8.9 Partner Relationship Management PeopleBook*

  Note. Employees should also be set up under Workforce as PeopleSoft CRM workers, so they have an employee ID

- Sales User

  Once an individual has both a PeopleSoft user ID and a PeopleSoft CRM person ID (and an employee ID, if appropriate), select Set Up CRM, Product Related, Sales, Security and Personalization, Sales Users to define the individual as a sales user in PeopleSoft Sales under the Sales, Security and Personalization menu.

When you define a sales user, you assign a sales access profile. Sales access profiles group actions that are granted to sales users regarding leads, opportunities, territory management, pipeline, and forecasts. Generally, these profiles correspond to employee roles in your organization. You can assign one or more sales access profiles to each sales user.

For example, you may create an access profile of sales manager to enable sales users with that access profile to adjust forecasts and to view and update calendars for all staff who are visible to them on the territory tree. Another sales access profile, sales administrator, might enable users with that sales access profile to view and edit revenue allocations. If you associate both sales manager and sales administrator with a sales user, that user has the combined privileges of both access profiles.

A person’s characteristics are based on the people with whom you associate the person in your system. A sales user may be associated with:

- Teams

  A sales user may be assigned to sales teams, which are groups of sales users who work together to sell products or services. An entire sales team may be associated with a particular lead or opportunity. A sales user may also be assigned to an account team, which is a group of sales users who are responsible for sales and service to specific customer accounts. A sales user is also assigned to a territory team, which is the group of sales users who are assigned to a territory.

  Note. Adding or removing a sales user from a lead or opportunity does not change the territory team to which that sales user belongs; it adds or removes the user only from the sales team for that opportunity.

- Territories

  Each sales user may belong to one or more territories. Territories represent functional divisions of an organization, often identified by geographical region or product line. Assign sales users to territories on the Territory Tree page or Sales User Visibility page.

Setting Up Sales Access Profiles

To set up sales access profiles, use the Sales Access Profile component (RSF_ACC_PROFILE).

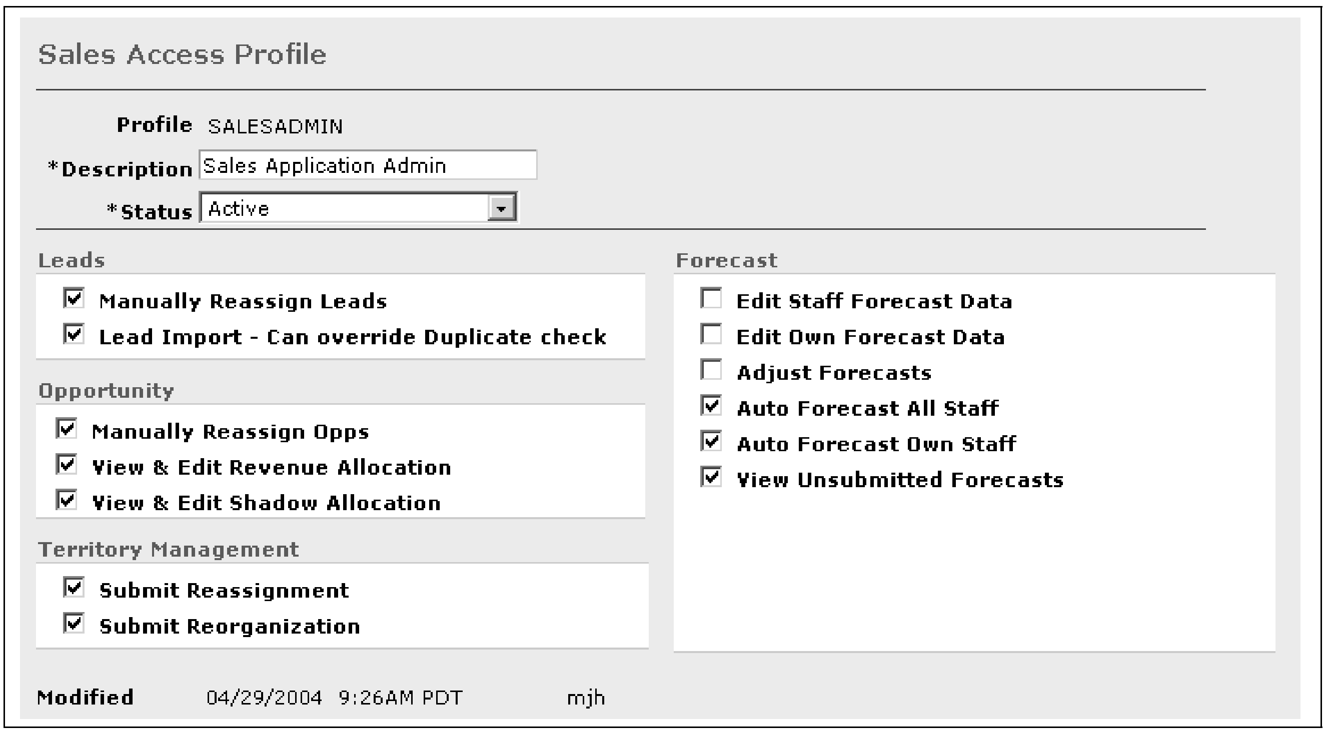
This section discusses how to set up sales access profiles.

Page Used to Set Up Sales Access Profiles

Page Name	Object Name	Navigation	Usage
Sales Access Profile	RSF_ACC_PROFILE	Set Up CRM, Product Related, Sales, Security and Personalization, Sales Access Profiles	Set up sales access profiles by creating profile roles and assigning functional user privileges to them.

Setting Up Sales Access Profiles

Access the Sales Access Profile page.



Sales Access Profile page

Create a sales access profile and select the access controls that you want a user with that profile to have.

PeopleSoft Sales delivers these predefined sales access profiles, which you can modify (or create additional ones) to meet your business needs:

- Financial Controller.
- Inside Sales Rep.
- Sales Lead Qualifier.
- Product Manager.
- Sales Application Admin.
- Sales Executive.
- Sales Manager w/Auto Forecast.

- Sales Manager - Limit Forecast.
- Sales User - Field Rep.
- Telemarketing Partner.

Leads

Manually Reassign Leads
Select to enable the user to reassign leads to different sales representatives. If cleared, all assignment-related fields (Territory, Region, Sales Team, and so on) are unavailable to this user.

See Chapter 12, "Assigning a Lead or Opportunity," Reassigning a Sales Representative's Leads, Opportunities, and Accounts, page 155.

Lead Import - Can override Duplicate check
Select to enable the user to override data for which they select Dedup check boxes on the Lead Import Template page. This permits the user to import data even if it is a duplicate.

See Chapter 11, "Importing Sales Leads," page 135.

Opportunity

Manually Reassign Opps (manually reassign opportunities)
Select to enable the user to reassign opportunities to different sales representatives.

If cleared, all assignment-related fields (territory, region, sales team, and so on) are unavailable to this user.

See Chapter 12, "Assigning a Lead or Opportunity," Reassigning a Sales Representative's Leads, Opportunities, and Accounts, page 155.

View & Edit Revenue Allocation
Select to enable the user to view and edit the revenue allocation percentages that you allocate to the sales teams for an opportunity. Revenue percentage is used to allocate opportunity revenue for revenue forecasting.

See Chapter 19, "Including Opportunities in Forecasts and Closing Opportunities," Specifying Revenue Percentages for Forecasting, page 216.

View & Edit Shadow Allocation
Select to enable the user to view and edit the shadow percentages and shadow amounts that you allocate to individual members of the sales team for an opportunity. Shadow percentage and allocation are used to allocate opportunity revenue for shadow forecasting.

See Chapter 19, "Including Opportunities in Forecasts and Closing Opportunities," Specifying Revenue Percentages for Forecasting, page 216.

Territory Management

Submit Reassignment
Select to enable the user to modify the system's automated reassignment of leads or opportunities during the tree reorganization process.

See Chapter 8, "Reorganizing or Deleting a Territory Tree," Reorganizing a Territory Tree, page 94.

Submit Reorganization
Select to enable the user to reorganize territories and people on any of your organization's territory trees.

See Chapter 8, “Reorganizing or Deleting a Territory Tree,” Reorganizing a Territory Tree, page 94.

Forecast

Edit Staff Forecast Data — Select to enable the user to edit forecast data for all staff to which the user has visibility on any of your organization’s territory trees.

See Chapter 21, “Using Forecasts,” Managing Forecasts, page 233.

Edit Own Forecast Data — Select to enable the user to edit his or her own forecast data. Edit activity overwrites existing data.

See Chapter 21, “Using Forecasts,” Adding and Adjusting Forecasts, page 228.

Adjust Forecasts — Select to enable the user to add rows to adjust a forecast. Adjustment activity remains visible.

See Chapter 21, “Using Forecasts,” Adding and Adjusting Forecasts, page 228.

Auto Forecast All Staff — Select to enable the user to autogenerate forecasts at any time for all staff to which he or she has visibility.

See Chapter 21, “Using Forecasts,” Autogenerating Forecasts, page 232.

Auto Forecast Own Staff — Select to enable the user to autogenerate forecasts at any time for the staff directly reporting to them.

See Chapter 21, “Using Forecasts,” Autogenerating Forecasts, page 232.

View Unsubmitted Forecasts — Select to enable the user to view forecasts that have been saved but not submitted for all staff to which he or she has visibility.

Setting Up Sales Users

To set up sales users, use the Sales Users (RSF_SUSER) component.

This section discusses how to:

- Create a sales user.
- Define a sales user’s visibility.
- Define a sales user’s pipeline targets.
- Define a sales user’s revenue quotas.
- Define a sales user’s product unit quotas.

Note. Before you can set up an individual as a sales user, the individual must exist as a PeopleSoft user with a user ID in PeopleTools and as a PeopleSoft CRM contact with a person ID.

See *Enterprise PeopleTools 8.45 PeopleBook: PeopleTools Security.*

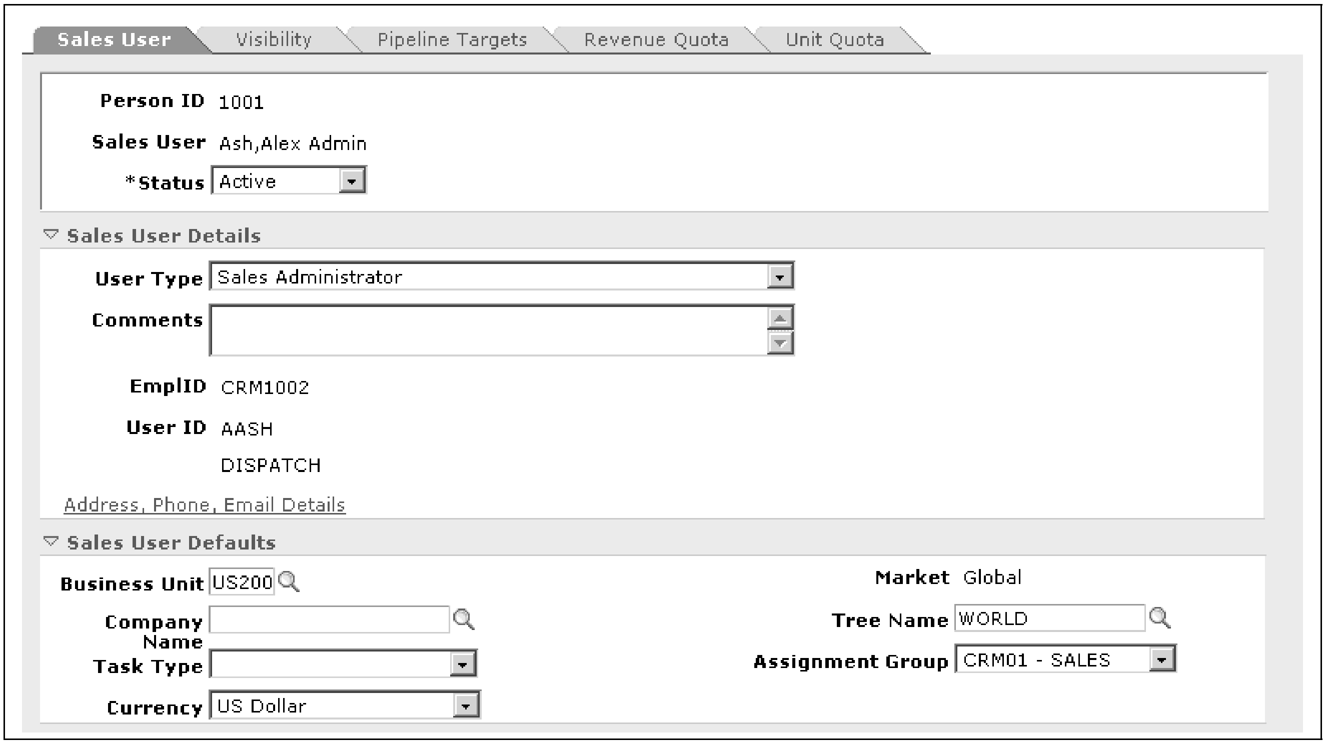
See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Defining Person Business Objects,” Defining Information for Business Contacts.

Pages Used to Set Up Sales Users

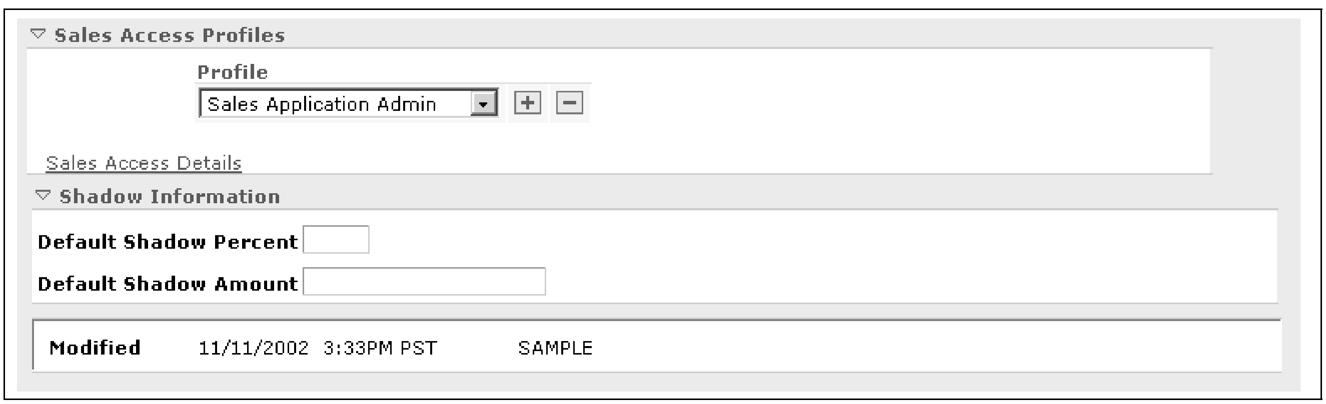
Page Name	Object Name	Navigation	Usage
Sales User	RSF_SUSER1	Set Up CRM, Product Related, Sales, Security and Personalization, Sales Users	Create a sales user by defining defaults and associating sales and account access profiles with the sales user.
Sales Access Details	RSF_SUSER_ACC_SEC	Set Up CRM, Product Related, Sales, Security and Personalization, Sales Users Click the Sales Access Details link.	View details of the selected sales access profile to determine whether it is the appropriate profile to assign.
Account Access Details	RSF_SUSER_CUST_SEC	Set Up CRM, Product Related, Sales, Security and Personalization, Sales Users Click the Account Access Details link.	View details of the selected account access profile to determine whether it is the appropriate profile to assign.
Worker	RD_PERSON_84	Workforce, Worker	Determine an employee's worker data, including address, phone, and email information.
Visibility	RSF_SUSER2	Set Up CRM, Product Related, Sales, Security and Personalization, Sales Users, Visibility	Define a sales user's visibility by identifying territories to which an individual should have access.
Pipeline Targets	RSF_SUSER_QS	Set Up CRM, Product Related, Sales, Security and Personalization, Sales Users, Pipeline Targets	Define a sales user's pipeline targets.
Revenue Quota	RSF_SUSER_QR	Set Up CRM, Product Related, Sales, Security and Personalization, Sales Users, Revenue Quota	Define a sales user's quotas including both revenue and shadow.
Unit Quota	RSF_SUSER_QU	Set Up CRM, Product Related, Sales, Security and Personalization, Sales Users, Unit Quota	Define a sales user's product unit quotas.

Creating a Sales User

Access the Sales User page.



Sales User page (1 of 2)



Sales User page (2 of 2)

Person ID Displays the Person ID of the individual whom you are creating as a sales user.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, "Defining Person Business Objects," Defining Information for Business Contacts.

Sales User Details

Type Select the type of sales user to create. Values are *Executive Sales Manager, Field Sales Rep, Inside Sales Rep, Pre-Sales Consultant, Sales Administrator, Sales Manager, Sales Tech Support,* and *Telesales Rep.*

Sales user types are translate values.

EmplID (employee ID) Displays the employee ID from the Worker page, if the individual is an employee.

User ID Displays the user ID with which the individual is associated in PeopleTools.

Address, Phone, Email Details Click to access the Worker page, where you can view an individual's personal and employee contact data.

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

Sales User Defaults

If a sales user is associated with multiple values for items in this section, the system displays the value that you specify here by default and provides a drop-down list box or other means of searching for and selecting from the sales user's other values.

Business Unit Enter the business unit for the leads and opportunities that the sales user creates. The business unit controls the setID, customers, and products to which the sales user has access.

Company Name Enter the name of the company for whose accounts the sales user is responsible or with which the sales user is most often associated.

Task Type Select the type of task with which the sales user should most often be associated.

Currency Select the currency in which to express revenues for the sales user.

Market PeopleSoft delivers this preset to *Global* for all sales users. You cannot change this field value.

Tree Name Enter the default tree to use for the sales user. If you do not enter a default tree here, when a tree name is needed, the system uses the tree that is associated with the specified business unit on the Sales Definition page.

Assignment Group Select the assignment group to use for the sales user.

See Chapter 6, "Configuring Assignment Criteria," Creating Assignment Groups, page 78.

Sales Access Profiles

Profile Select the sales access profile to use to provide functional sales abilities for the sales user and to control the sales data that the sales user can view and modify. Set up sales access profiles on the Sales Access Profile page.

See Chapter 3, "Setting Up Sales Security and Personalization," Setting Up Sales Access Profiles, page 12.

Sales Access Details Click to access the Sales Access Details page.

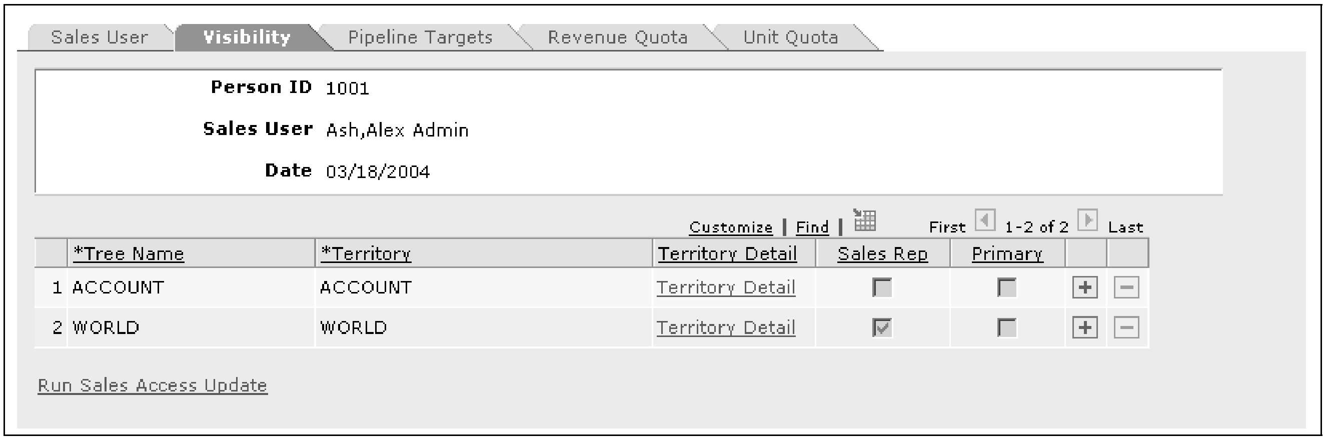
Shadow Information

Default Shadow Percent and **Default Shadow Amount** Enter the percent or amount (expressed in the selected currency) to use as the allocation for the sales user. For example, suppose that your agreement specifies that the sales user earns a minimum two percent of all revenues that he brings in, then enter *2* in the Default Shadow Percent field. If your agreement is that the sales user earns a minimum of 100 USD for each opportunity, then enter *100* in the Default Shadow Amount field.

Managers can override this default percent or amount at the transaction level.

Defining a Sales User's Visibility

Access the Visibility page.



Visibility page

Tree Name and **Territory** — Display the trees and territories to which the sales user should have access and on which the sales user is a territory team member. Click the plus button to insert a row and add another tree or territory. The minus button is enabled for you to delete the row until you save the page; once you save the page, the minus button is not enabled.

Territory Detail — Click to remove the territory visibility by accessing the Territory Definitions page, where you can view information about the territory and click the minus button to remove the sales user from the territory team.

When you click OK, the system returns you to the Visibility page for the same sales user. The row for the removed territory no longer appears.

Sales Rep (sales representative) — Indicates that the sales user is a sales representative (as opposed to a partner, worker, or other position) and is available for territory assignment.

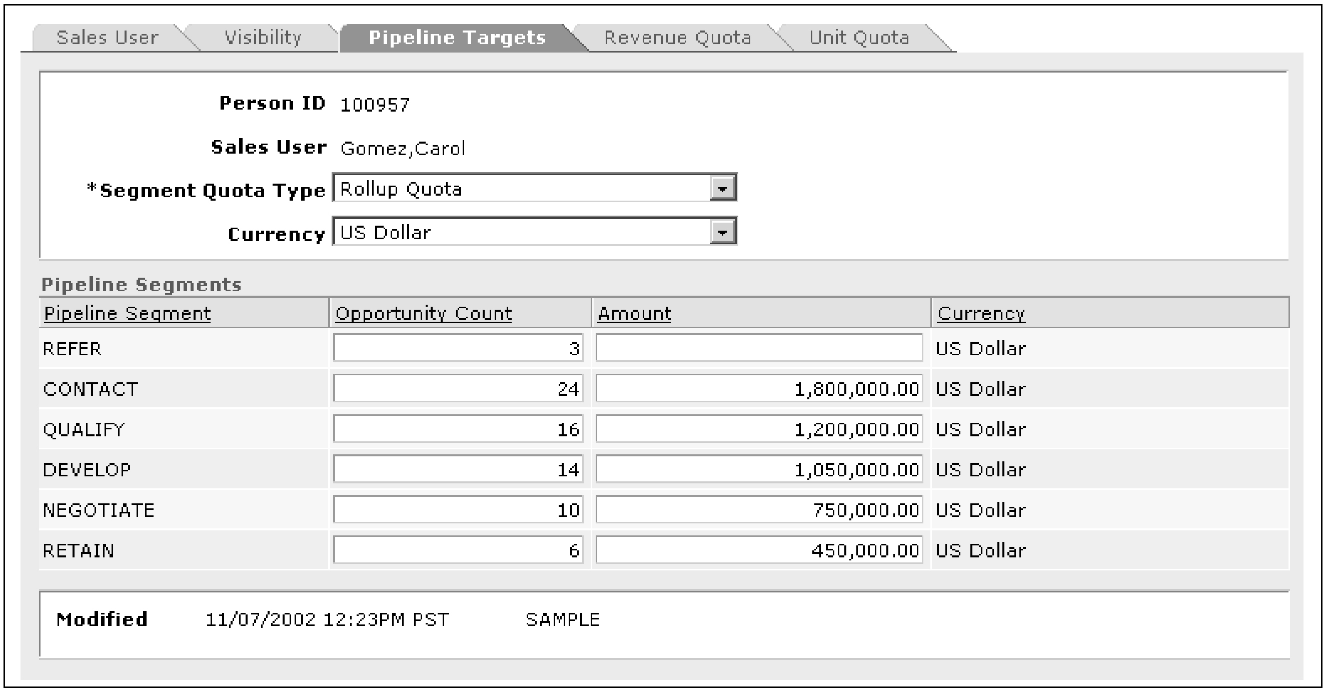
Primary — Indicates that the sales user is the primary sales representative for the territory.

Run Sales Access Update — Click to access the Sales Access Update page, where you can update sales users and their access.

Note. Each time that you create a sales user or change a user's visibility settings, you must run the Sales Access Update process to apply the changes.

Defining a Sales User's Pipeline Targets

Access the Pipeline Targets page.



Pipeline Targets page

Pipelines compare real-time activities to the activity that is required to meet a quota. A pipeline includes segments that correlate to steps in your organization's sales process. In the example, the pipeline segments correlate to PeopleSoft KES steps Contact, Qualify, Develop, Negotiate, and Retain.

Use this page to specify the targets that the sales user must reach for each segment to meet the overall quota.

Segment Quota Type Select the type of quota to use for the sales user's pipeline segments. Values are:

Manager Quota: The manager's own, individual quota.

Rollup Quota: The sum of quotas for all sales representatives who report to the manager.

Currency Displays the currency that you specified on the Sales User page. You can specify a different currency in which to express pipeline amounts.

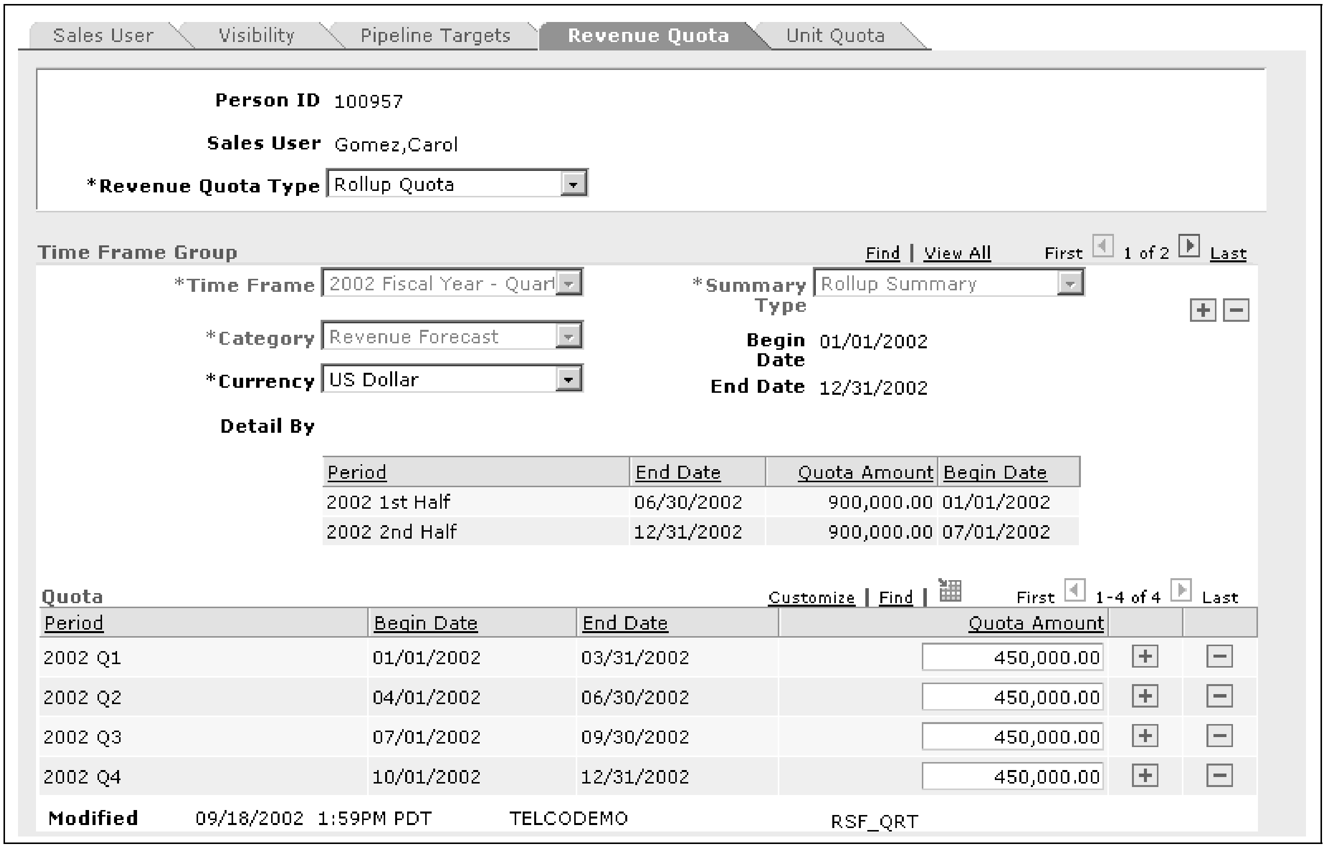
Pipeline Segment Displays the pipeline segments that correlate to your sales process.

Opportunity Count and **Amount** Enter the number of opportunities that the sales user must have within this segment to meet quota for the pipeline segment. Enter the monetary amount required to meet quota for the segment. You can have an opportunity count and monetary amount for a segment, or just one or the other.

For example, if the sales user must have a minimum of five opportunities in the contact step of the process at any given time, then enter *5* in the Opportunity Count field. Chances are that you will not use a monetary amount for this segment. On the other hand, for the negotiate step, you might require an opportunity count of *10* or a monetary amount of *50,000* (to indicate 50,000 USD or whatever currency you are using) to meet quota for this step.

Defining a Sales User's Revenue Quotas

Access the Revenue Quota page.



Revenue Quota page

Revenue quotas specify how much revenue the sales user must generate for the division or the overall enterprise.

Revenue Quota Type Select the type of quota to use for the sales user's revenue quota. Values are:

Manager Quota: The manager's own, individual quota.

Rollup Quota: The sum of quotas for all sales representatives who report to the manager.

Time Frame Select the time frame in which the sales user must meet the revenue quota.

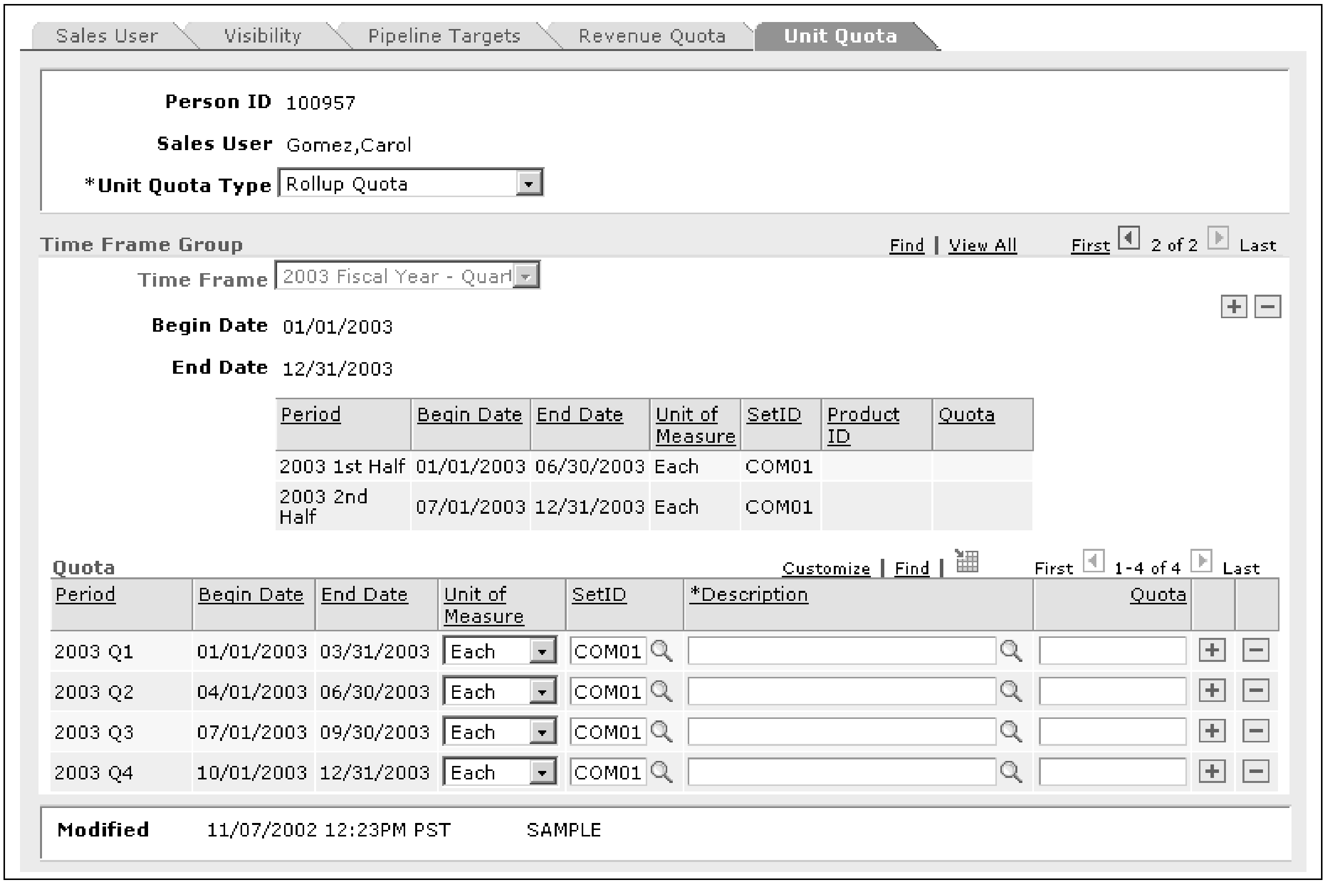
Category Select the forecast category, either *Revenue Forecast* or *Shadow Forecast*, to use to calculate the quota.

Detail By Displays the criteria by which the quotas can be defined, if the time frame has been established to define detail quotas.

For example, if you established the time frame to define detail quotas by revenue type, then *Revenue Type* appears here, and you may enter the quotas by time frame period and revenue type.

Defining a Sales User's Unit Quotas

Access the Unit Quota page.



Unit Quota page

Unit quotas specify how many products the sales user must sell.

Unit Quota Type Select the type of quota to use for the sales user's unit quota. Values are:

Manager Quota: The manager's own, individual quota.

Rollup Quota: The sum of quotas for all sales representatives who report to the manager.

Time Frame Select the time frame in which the sales user must meet the unit quota.

Setting Up Sales Teams

To set up sales teams, use the Sales Team (RSF_TEAM) component.

This section discusses setting up sales teams.

Understanding Sales Team Concepts in PeopleSoft Sales

In PeopleSoft Sales, there are four team concepts: sales team, territory team, account team, and lead or opportunity team.

The sales team, which you create here, is the group of sales users who typically work together and can be assigned to a specific lead or opportunity, as a whole team or individually.

The territory team is the group of sales users who are assigned to the same territory on the territory tree.

The account team is the group of sales users who are assigned responsibility for specific customer accounts.

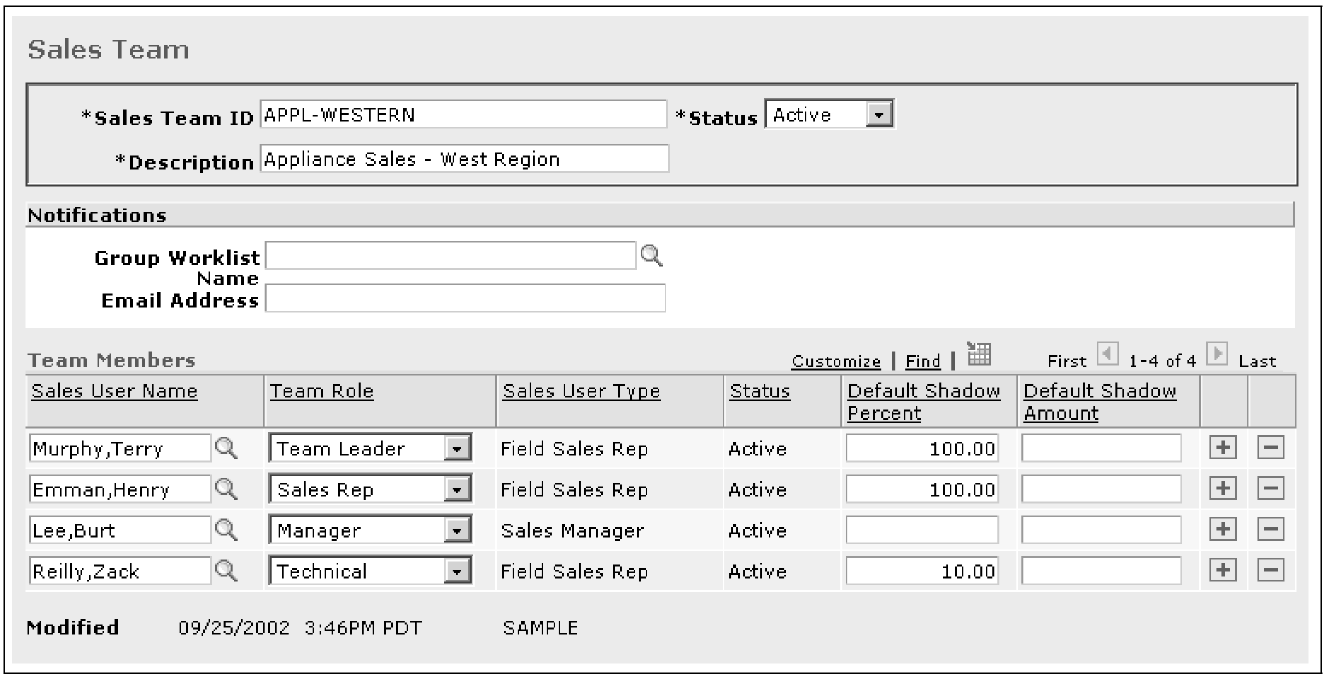
The lead or opportunity team is assigned to a specific lead or opportunity. This team can consist of any combination of members of the territory teams, sales teams, and account teams.

Page Used to Set Up Sales Teams

Page Name	Object Name	Navigation	Usage
Sales Team	RSF_TEAM	Set Up CRM, Product Related, Sales, Sales Team	Set up sales teams.

Setting Up Sales Teams

Access the Sales Team page.



Sales Team page

On the Sales Team page, you can select from existing sales teams to assign sales users to the lead or opportunity. The available sales teams and sales team members are from the sales teams that you set up here. After you set up sales teams, you can remove individuals from the lead or opportunity without removing them from the sales team.

Sales Team ID Enter an ID for the sales team. This ID should be unique and easily recognizable; including the team manager's name and the business unit can be helpful.

Notifications

Group Worklist Name Enter the worklist that is relevant to the sales team that you are creating. Notifications that are triggered by workflow are sent to the worklists that are specified on the workflow event.

Email Address	Enter the email address to which emails for the team should be sent.

Team Members

Sales User Name and **Sales User Type**	Enter the name of the sales user to assign to the sales team. When you do so, the system displays the type of sales user from the individual's Sales User page. See Chapter 3, "Setting Up Sales Security and Personalization," Creating a Sales User, page 16.
Team Role	Select the individual's role on the sales team. Values include *Consultant, Legal, Manager,* and *Field Rep.* See Chapter 3, "Setting Up Sales Security and Personalization," Creating a Sales User, page 16.
Default Shadow Percent and **Default Shadow Amount**	Displays the individual's default shadow percent and default shadow amount from the Sales User page. See Chapter 3, "Setting Up Sales Security and Personalization," Creating a Sales User, page 16.

Setting Up Functional Options

PeopleSoft Sales uses the PeopleSoft CRM application security framework to control functional access to certain field, sections and actions within the Lead and Opportunity components. Functional options define the functions that can be carried out by members of a membership list, such as sales representatives or sales managers. Functional options are grouped into functional option groups that are similar to sales access profiles. You associate a functional option group with a membership list that contains a list of PeopleTools roles. This creates a security profile. The difference between the sales access profile and functional option group is that you assign the sales access profile to individual people, while you associate a functional option group with one or more PeopleTools roles.

You can set up functional options, functional option groups, membership lists and security profiles in PeopleSoft CRM Application Security.

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

Some of the functional options for PeopleSoft Sales are linked to a field or a section in the Lead and Opportunity component. Display templates determine how the system displays the fields and sections.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook,* "Configuring Display Templates," Configuring Display Templates for Components.

This table lists the functional options available for PeopleSoft Sales:

Functional Option	Default and Revoked Settings
CORE_RSF_ADVANCED	Default setting: When the user enters a lead or opportunity, the system shows all the fields, sections, tabs that are marked as controlled by display template security. Revoked setting: When the user enters a lead or opportunity, the system hides the fields, sections, tabs that are marked as controlled by display template security. If you use this setting and the delivered display templates for leads and opportunities, the system displays the basic fields necessary for entering leads and opportunities. You can set up display template security in the Display Template Details component. See Chapter 4, “Setting Up Sales Leads and Opportunities,” Setting Up Display Templates for Leads and Opportunities, page 61.
CORE_RSF_AUTO_ASSIGN_OFF	Default setting: When the user saves a lead or opportunity, the system does not automatically assign a sales representative to the lead or opportunity. Revoked setting: When the user saves a lead or opportunity, the system automatically assigns a sales representative to the lead or opportunity by using assignment criteria.
CORE_RSF_DEFAULT_OWNER	Default setting: When a user creates a new lead or opportunity, the system adds the user who creates the lead or opportunity to the Sales Team Member section as the primary sales representative. Revoked setting: When a user creates a new lead or opportunity, the system does not add a sales representative to the Sales Team Member section.
CORE_RSF_FCAST_ROLLUP	Default setting: The default value for the Forecast View field on the Forecast page in the Search Forecasts component is *Manager Review*. This is the view that sales managers use to roll up and analyze forecasts. Revoked setting: The default value for the field is *Subtotals*. This reduces load time and may be preferable for second level and higher level managers. See Chapter 21, “Using Forecasts,” Managing Forecasts, page 233.
CORE_RSF_FCAST_SIMPLE	Default setting: The user has access to all views on the Forecast page in the Search Forecasts component. Revoked setting: The user has access to only the following views on the Forecast page in the Search Forecasts component: *Combined Forecasts, Manager Review,* and *Subtotals*.

Functional Option	Default and Revoked Settings
CORE_RSF_SEARCH_PRODUCT_GROUP	Default setting: The system displays the product group search option in the Lead and Opportunity components. Revoked setting: The system does not display the product group search option in the Lead and Opportunity components.
CORE_RSF_SHOW_SITE	Default setting: The system displays the site field and search on the Discover page of the Lead and Opportunity components. Revoked setting: The system does not display the site field and search on the Discover page of the Lead and Opportunity components.
CORE_RSF_SUMMARY	Default setting: The system displays the summary page in the Lead and Opportunity components. Revoked setting: The system does not display the summary page in the Lead and Opportunity components.

CHAPTER 4

Setting Up Sales Leads and Opportunities

This chapter discusses how to:

- Set up a sales process.
- Set up component field default values.
- Set up lead ratings.
- Set up assignment weights.
- Set up lead reject and turnback reasons.
- Set up sales contacts.
- Set up sales partners.
- Set up sales competitors.
- Set up buying criteria.
- Set up lead sources.
- Set up fallout reasons.
- Set up pipeline segments.
- Set up sales lead import templates.
- Set up the summary page for leads and opportunities.
- Set up display templates for leads and opportunities.

Setting Up a Sales Process

To set up a sales process, use the Sales Process component (RSF_SALES_MODEL).

This section provides an overview of the Knowledge-Enabled Sales (KES) process and discusses how to:

- Define a process.
- Clone a process.

Understanding the KES Process

Sales efforts typically follow a defined series of stages and tasks. PeopleSoft Sales provides the KES process, an out-of-the-box proprietary sales process that enables you to identify the stages and tasks that your organization's sales process requires. The KES process can also help sales representatives learn how to perform tasks using your organization's best practices.

The KES process includes several stages. Each stage is associated with an opportunity pipeline segment, and every stage includes one or more tasks. You can use PeopleSoft KES, or you can define your own sales stages and tasks based on your organization's preferred sales model. You can enable multiple sales processes at one time. For example, you might have one process for selling within a particular industry and another for selling a particular product or service line. You can relate all of the various stages to common pipeline segments to ensure that you analyze pipeline information correctly.

This table lists the KES stages and their tasks. You can modify these to meet your business needs.

Note. The weights included in this table are provided as an example of how the KES process works.

Stage	Weight	Purpose	Tasks
Discover	10	Identify and review knowledge about the customer, industry, and competitors before making the initial sales call in the qualify stage.	1. Review lead information. 2. Review opportunity information. 3. Review customer information. 4. Review customer contacts. 5. Review industry briefing. 6. Review customer briefing. 7. Perform customer research to identify recent news releases or financial statements that are pertinent to the customer. 8. Review competitor briefing.
Qualify	20	Align the customer's buying process with the sales process based on the knowledge obtained from the initial sales call. Also, obtain a solid understanding of the customer's needs, and identify the decision makers, influences, and competitive landscape.	1. Plan initial sales call. 2. Conduct initial sales call. 3. Update opportunity information. 4. Update customer information. 5. Assemble customer's buying team. 6. Assemble sales team. 7. Follow up on initial sales call. 8. Update competitor information. 9. Document customer's needs. 10. Create opportunity plan (needs analysis, product research, follow-up calls, and so on) and assign tasks to move the opportunity to the solution stage.
Develop Solution	20	Define a set of products (and services, as needed) to meet the customer's needs and preferences, and obtain a quote for these products.	1. Define solution. 2. Configure and quote solution. 3. Review solution with sales team. 4. Review solution with customer. 5. Finalize solution based on feedback from sales team and customer.

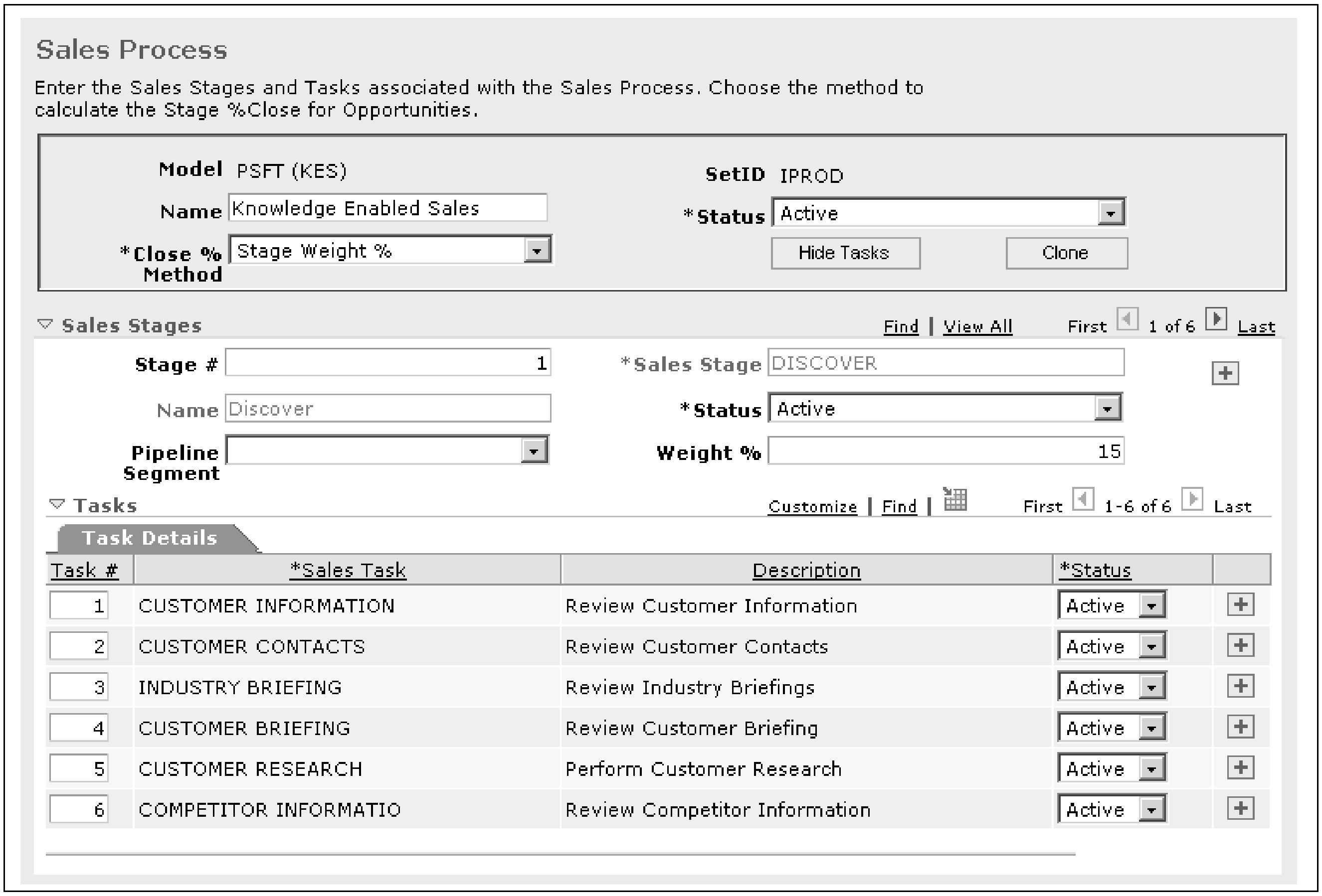
Stage	Weight	Purpose	Tasks
Develop Proposal	20	Create a comprehensive written proposal identifying how the proposed solution addresses the customer's needs. In addition to containing the quote itself, the proposal includes product descriptions, support policies, and legal information such as warranties.	1. Update opportunity information. 2. Generate proposal based on the quoted solution. 3. Redefine proposal, if necessary. 4. Review proposal with sales team. 5. Refine and finalize proposal based on feedback from sales team. 6. Submit written proposal to customer and update the status.
Negotiate and Close	20	Formally discuss the written proposal with the customer and negotiate terms and conditions to win the business.	1. Review negotiation strategies in preparation for meeting with the customer. 2. Conduct negotiation meeting to win the business. 3. Complete legal contracts. 4. Summarize the opportunity outcome, updating the status and identifying why the opportunity was won or lost.
Retain	10	Prepare a plan to effectively manage the customer relationship after closing the opportunity.	1. Update solution based on opportunity outcome. 2. Update customer information, including new contacts for implementation and ongoing customer relationship. 3. Prepare relationship plan. 4. Conduct relationship meeting to discuss relationship plan.

Pages Used to Set Up a Sales Process

Page Name	Object Name	Navigation	Usage
Sales Process	RSF_SALES_MODEL	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Process	Review the KES stages and tasks that make up the sales process delivered with the PeopleSoft system. Define other stages or tasks as necessary.
Clone Sales Process	RSF_SLSPRCS_CLONE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Process Click Clone on the Sales Process page.	Copy an existing set of stages and tasks.

Defining a Process

Access the Sales Process page.



Sales Process page

Sales Process and **Name**

Displays *PSFT (KES)* and *Knowledge Enabled Sales* as the default values, respectively, if you use the KES process. If you use a different sales process, that process and name appear here. You can edit the name on this page.

Close % Method (close percentage method)

Select a method for evaluating the progress of opportunities, where 100% equals closed or completed. Values are:

- *Stage Weight %:* Expresses progress as a percentage of the weighted stages that have been completed.

  For example, suppose that your sales model consists of three stages and you assign a weight of 50% to the first stage and 25% each to the second and third stages. When you complete the first two stages, the system calculates that you have completed 75% of the sales model.

- *Stage Level:* Determines progress as a simple percentage of the stages completed.

  For example, suppose that your sales model consists of four stages. When you complete the first two stages, the system calculates that you have completed 50% of the sales model.

- *Task Type:* Determines progress as a simple percentage of tasks completed.

  For example, suppose that your sales model consists of eight tasks. When you complete the first six tasks, the system calculates that you have completed 75% of the sales model.

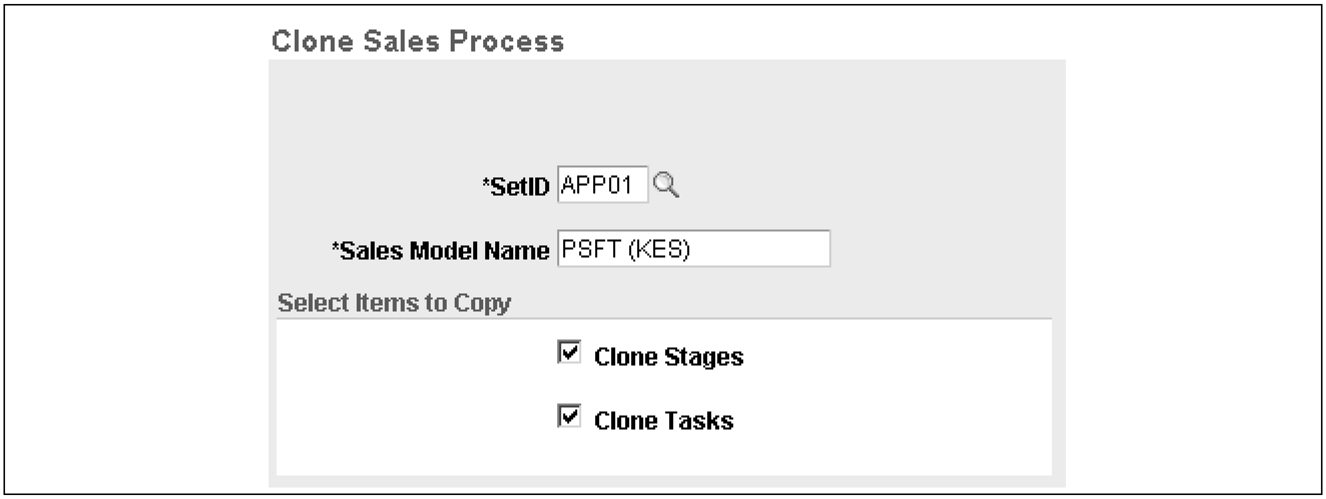
Hide Tasks or **Show Tasks**	Click to hide or display tasks. If you use tasks associated with your sales process, display them. Otherwise, hide any tasks that appear here.
Clone	Click to access the Clone Sales Process page, where you can copy or clone the sales process to a different setID. You can clone the stages and tasks of the process.
Stage # (stage number) and **Sales Stage**	Displays the sequence number and stage of the process, and lists the associated tasks at the bottom of the page. Click the Add button to create additional stages of the process and associate tasks with them. The system enters the stage sequence number. You can override the sequence numbers to reorder the stages.
Pipeline Segment	Identify the pipeline segment to associate with the stage. In the KES process, pipeline segments include *Contact, Develop, Negotiate, Qualify, Reference,* and *Retain.* You must specify a pipeline segment to correlate with the stage if you set up pipeline targets for a sales user's pipeline segment quotas on the Sales User page. See Chapter 3, "Setting Up Sales Security and Personalization," Defining a Sales User's Pipeline Targets, page 19.
Weight % (weight percentage)	Enter the weight percentage that represents that stage's portion of the sales model. For example, if a stage represents half of the sales model, half of the effort, half of the time, half of the important landmarks, or half of some other measure, then enter *50* (percent).

Tasks

Task # (task number) and **Sales Task**	Displays the sequence number and name of the discrete activity that runs as part of a sales stage. The system enters the sequence number when you add a task. You can override sequence numbers to reorder the tasks.

Cloning a Process

Access the Clone Sales Process page.



Clone Sales Process page

You can copy (or *clone*) an existing process with its stages and tasks and then make adjustments to create a new process.

Setting Up Component Field Default Values

When a sales user creates a lead or opportunity, the lead or opportunity description is a required field. The user can enter any description to identify the lead or opportunity. However, if a user does not enter a description and saves the lead or opportunity, the system saves a default value for the description based on a combination of fields set up on the Component Field Default page.

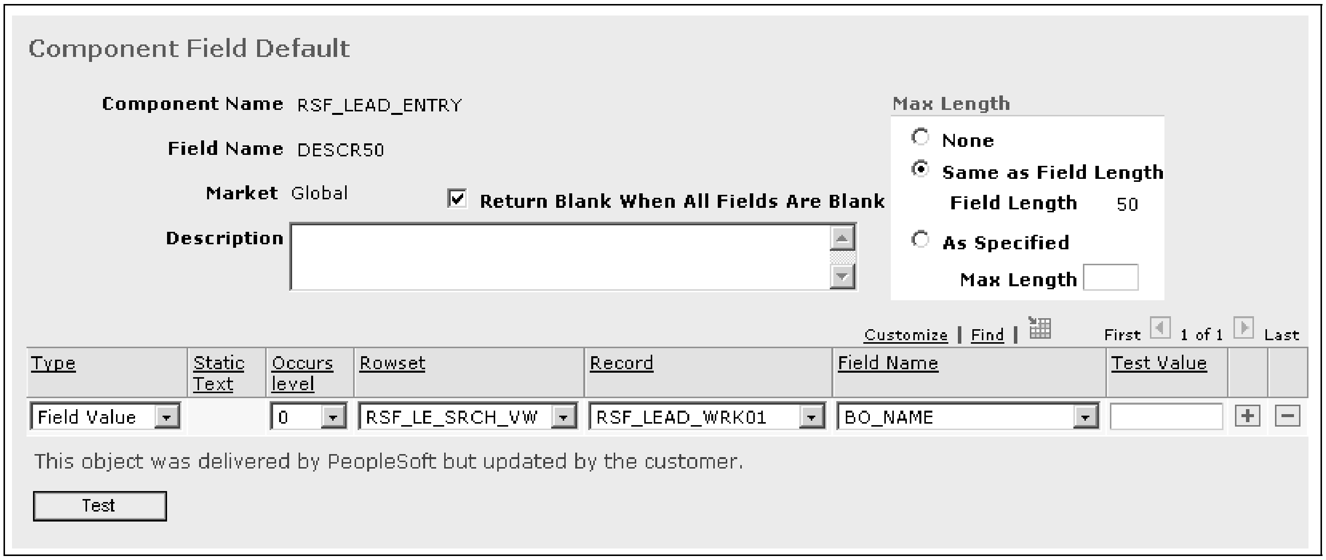
PeopleSoft Sales delivers two default settings for component fields — one for the lead description and one for the opportunity description. These settings specify that the system populates the lead and opportunity description with the name of the customer if the sales user does not enter a description. You can change these default settings by using the Component Field Default page.

Page Used to Set Up Component Field Default Values

Page Name	Object Name	Navigation	Usage
Component Field Default	RB_COMP_FLD_DFLT	Set Up CRM, Common Definitions, Component Configuration, Component Field Default	Set up default values for required fields.

Setting Up Component Field Default Values

Access the Component Field Default page.



Component Field Default page

Select the *RSF_LEAD_ENTRY* and *DESCR50* for the Component Name and Field Name to modify the settings for the lead description, or *RSF_OPPORTUNITY* and *OPPORTUNITY_NAME* to modify the settings for the opportunity description.

Click the Modify System Data button to edit the fields on the Component Field Default page.

If you enter multiple rows, the system concatenates the values from the rows to form the default value.

Max Length (maximum length) — Select a value for the maximum character length of the default value. Values are *None, Same as Field Length*, or *As Specified*. If you select *As Specified,* then enter a value in the Max Length field.

Return Blank When All Fields Are Blank — Select this check box to have the system leave the field blank when all the fields in the criteria grid are blank for the transaction.

Type — Values are*Field Value*, *Blank Space*, and *Static Text.* If you select *Field Value*, you must enter the Rowset, Record, and Field Name.

Occurs level — Enter the level at which the field is located.

Rowset — Enter the name of the Rowset that contains the field.

Record — Select the record that contains the Field Name that you use to populate the description field.

Field Name — Select the field name that you use to populate the description field.

Test Value — If you select *Field Value* for the Type, enter a typical value in this field for testing purposes. Click the Test button to view a potential name. The system retrieves the actual value based on the field during live input.

Test — Click this button to display the projected lead or opportunity default value, which appears to the right of the button. If you have multiple rows, the system concatenates the values from the rows.

Setting Up Lead Ratings

To set up lead ratings, use the Lead Ratings component (RSF_LEAD_RATING).

To map rate set values to lead ratings, use the Lead Rating by Rate Set Value component (RT_RS_TO_LEAD_RATE).

This section discusses how to:

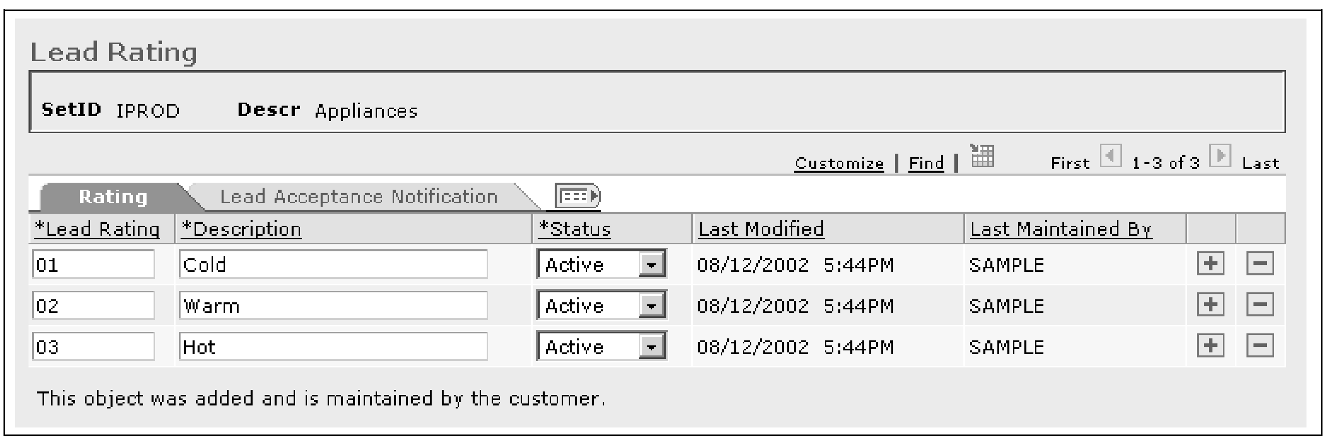
- Define lead ratings and set workflow triggers.
- Map survey values to lead ratings.

Pages Used to Set Up Lead Ratings

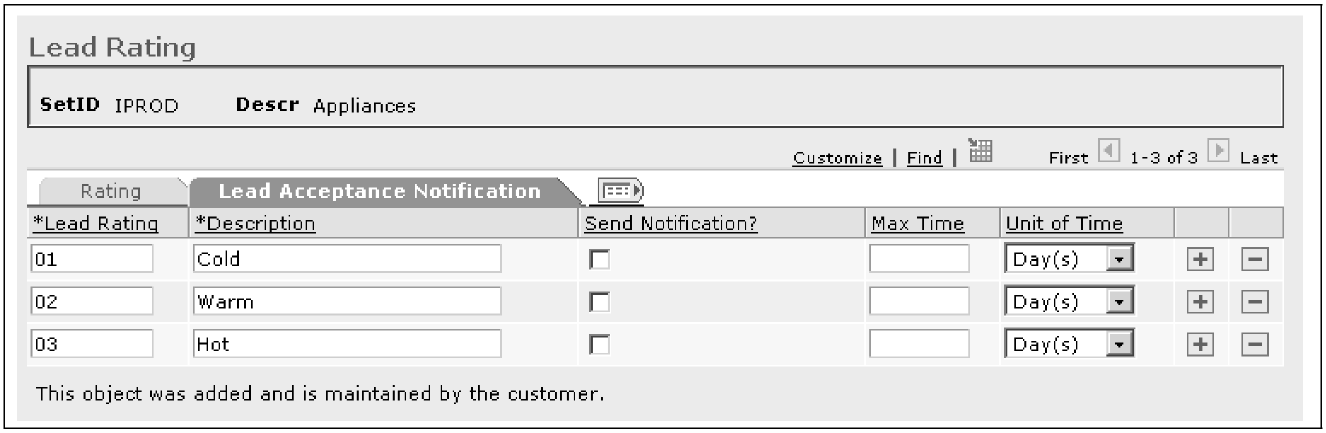
Page Name	Object Name	Navigation	Usage
Lead Rating	RSF_LEAD_RATING	Set Up CRM, Product Related, Sales, Lead and Opportunity, Lead Ratings	Define ratings, keyed by setID, to identify the nature (or the so-called *temperature*) of a lead with regard to the possibility of becoming a sale, and set parameters for triggering workflow.
Rate Set Value to Lead Rating	RT_RS_TO_LEAD_RATE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Lead Rating by Rate Sets	Map branch script rate set values to lead ratings.

Defining Lead Ratings and Setting Workflow Triggers

Access the Lead Rating page.



Lead Rating page: Rating tab



Lead Rating page: Lead Acceptance Notification tab

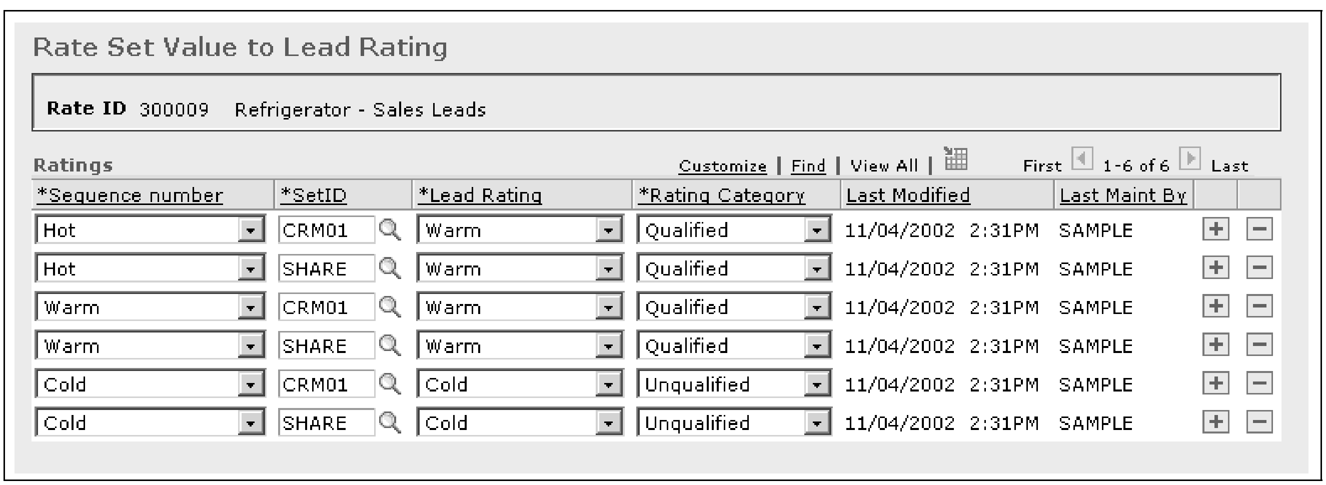
Create ratings (for example, *Cold*, *Warm*, and *Hot)* that you can use to trigger PeopleSoft Sales workflow notifications. The system sends notifications when a lead or opportunity is not accepted or rejected within a specified time period.

Send Notification? Select to send an email notification to the worklist explaining that the lead or opportunity with the specified rating has not been accepted or rejected within the allowable time.

Max Time (maximum time) and **Unit of Time** Specify the maximum delay period—expressed in days, hours, or minutes—by which a lead with that rating must either be accepted or rejected. If the lead is not accepted or rejected within that time, then the defined workflow is triggered.

Mapping Survey Values to Lead Ratings

Access the Rate Set Value to Lead Rating page.



Rate Set Value to Lead Rating page

When a marketing (or telemarketing) group creates a branch script survey, it defines rate set values so that the script can translate the overall score into a meaningful rating. You can map those rate set values to lead ratings here. That way, if the survey score returns the equivalent of a lead rating with the rating category of *Qualified*, the marketing group can forward the prospect to the sales group as a qualified lead.

See Also

PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook, “Using PeopleSoft Telemarketing”

Setting Up Assignment Weights

To define assignment weights, use the Assignment Weights component (RSF_ASSIGN_W_TBL).

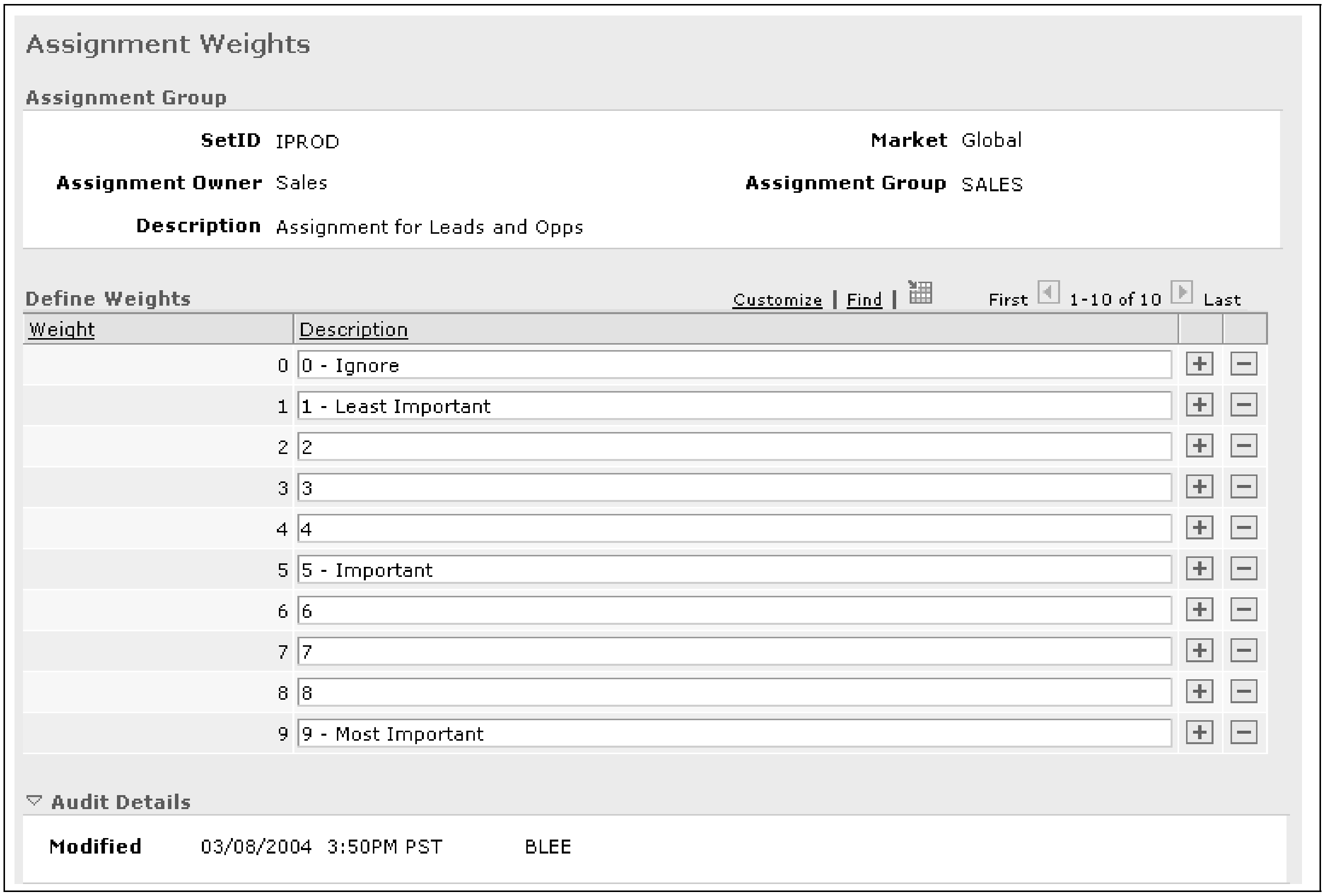
This section discusses how to define assignment weights.

Page Used to Set Up Assignment Weights

Page Name	Object Name	Navigation	Usage
Assignment Weights	RSF_ASSIGN_W_TBL	Set Up CRM, Product Related, Sales, Lead and Opportunity, Assignment Weights	Define assignment weights that identify the level of importance for criteria that the system uses to determine the assignment of a lead or opportunity to a territory.

Defining Assignment Weights

Access the Assignment Weights page.



Assignment Weights page

Predefined assignment weights are delivered with the following anchor weights. You can use or modify these, and you can define different sets for different combinations of setIDs and assignment groups:

- *0* is ignore.
- *5* is important.
- *9* is most important.

Assignment weights are part of the criteria used in assigning leads and opportunities.

See Also

Chapter 6, “Configuring Assignment Criteria,” Defining Criteria and Their Weights, page 82

Setting Up Lead Reject and Turnback Reasons

To set up lead reject and turnback reasons, use the Lead Reject Reasons component (RSF_LEAD_RJCT_RSN).

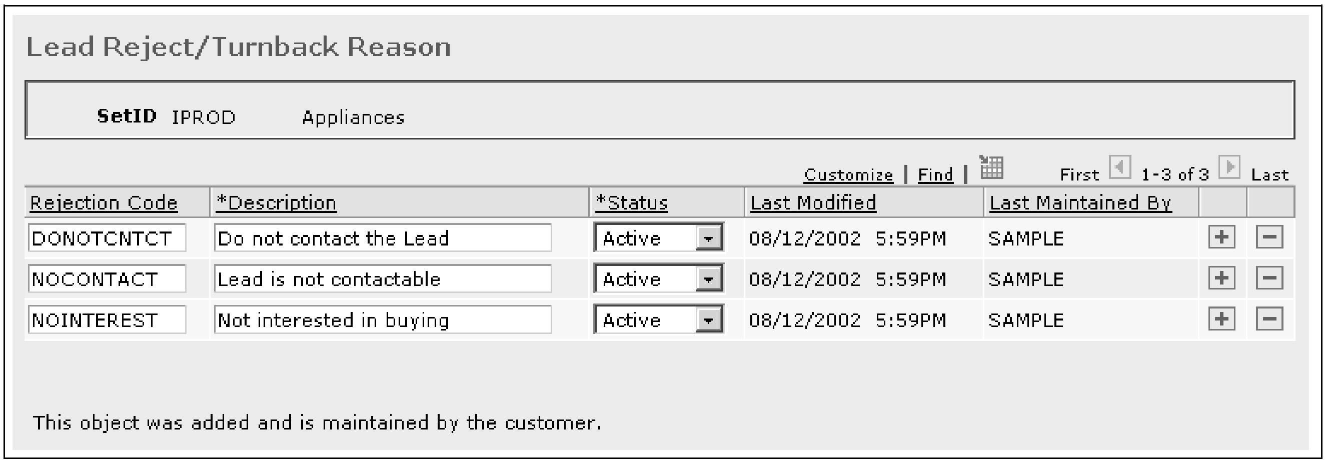
This section discusses how to set up lead reject and turnback reasons.

Page Used to Set Up Lead Reject and Turnback Reasons

Page Name	Object Name	Navigation	Usage
Lead Reject/Turnback Reason	RSF_LE_RJCT_RSN	Set Up CRM, Product Related, Sales, Lead and Opportunity, Lead Reject Reasons	Define reasons, keyed by setID, for sales representatives to use when rejecting or turning back a lead.

Setting Up Lead Reject and Turnback Reasons

Access the Lead Reject/Turnback Reason page.



Lead Reject/Turnback Reason page

Enter codes and descriptions for rejecting a lead.

To reject or turn back a lead, a PeopleSoft Sales user must identify a reject or turnback reason on the Lead - Discover page. On the Lead Reject/Turnback Reason page, you define the possible reasons from which the PeopleSoft Sales user can select.

See Also

Chapter 12, "Assigning a Lead or Opportunity," Accepting, Rejecting, or Turning Back a Lead Assignment, page 151

Setting Up Sales Contacts

To set up sales contacts, use the Sales Contact component (RSF_CONT_SETUP).

To set up contact roles, use the Contact Roles component (RSF_ROLE_CD_TBL).

This section discusses how to:

- Set up contact support levels.
- Set up contact impact levels.
- Set up contact titles.

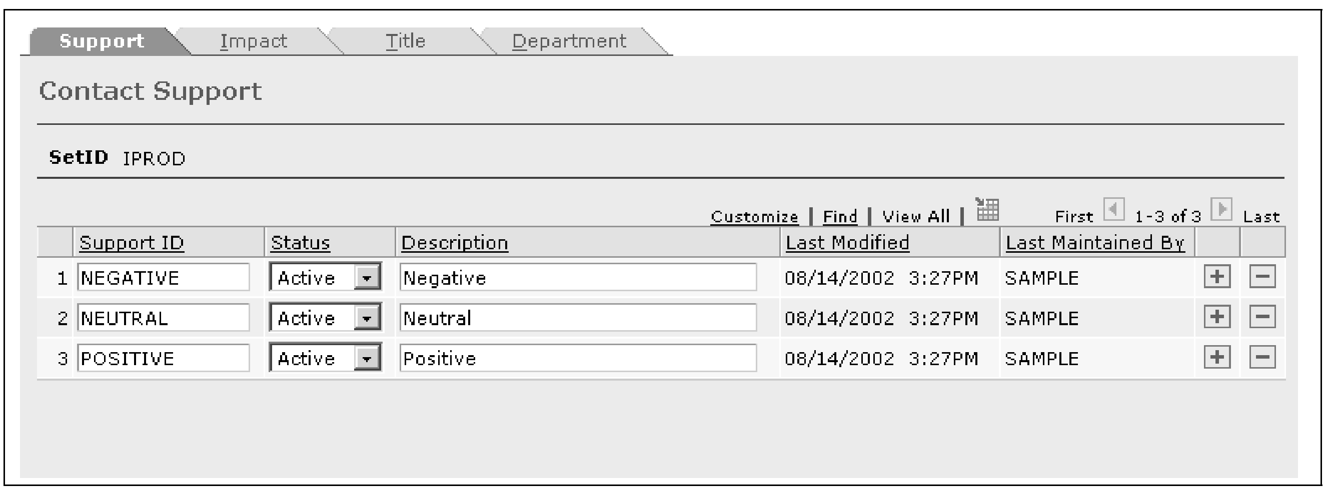
- Set up contact departments.
- Set up contact roles.

Pages Used to Set Up Sales Contacts

Page Name	Object Name	Navigation	Usage
Contact Support	RSF_CONT_SUPPORT	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Contacts	Define support levels for describing contacts.
Contact Impact	RSF_CONT_IMPACT	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Contacts, Impact	Define impact levels for describing contacts.
Contact Title	RSF_CONT_TITLE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Contacts, Title	Define titles for describing contacts.
Contact Department	RSF_CONT_DEPART	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Contacts, Department	Define departments for describing contacts.
Contact Roles	RSF_ROLE_CD_TBL	Set Up CRM, Product Related, Sales, Lead and Opportunity, Contact Roles	Define roles for describing contacts.

Setting Up Contact Support Levels

Access the Contact Support page.



Contact Support page

Create support levels (for example, *Negative*, *Neutral*, and *Positive*) that enable PeopleSoft Sales users to identify the type of support that a contact shows for moving the sale forward.

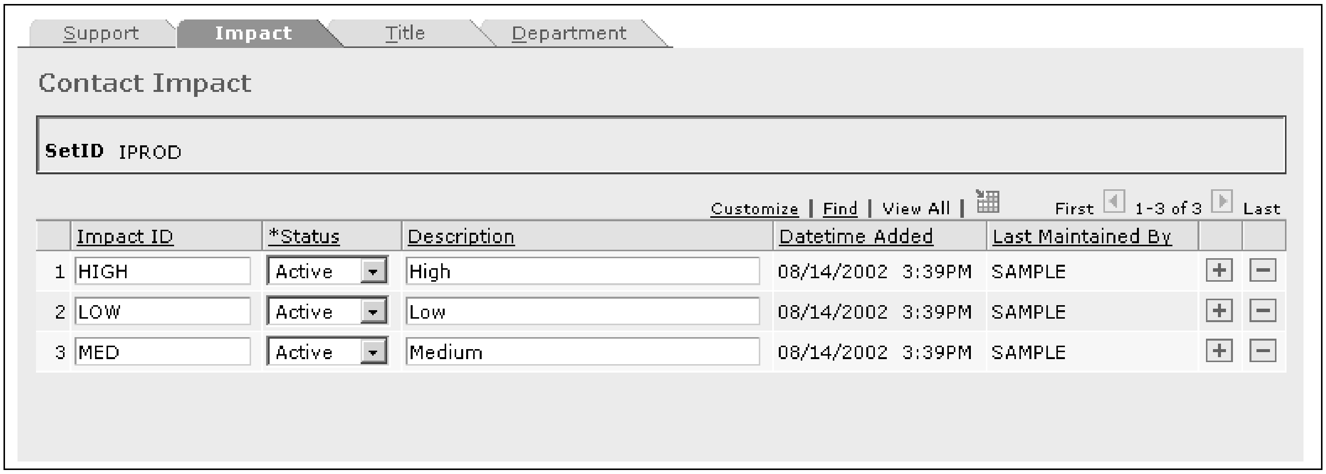
Support levels appear on the Impact tab and the Contact grid of the Discover page in the leads and opportunities details components.

See Also

Chapter 10, “Creating Sales Leads and Opportunities,” Selecting Customer Contacts for a Lead or Opportunity, page 126

Setting Up Contact Impact Levels

Access the Contact Impact page.



Contact Impact page

Create impact levels (for example, *High*, *Low*, and *Medium*) that enable PeopleSoft Sales users to identify the impact that a contact might have on the customer’s decision to purchase.

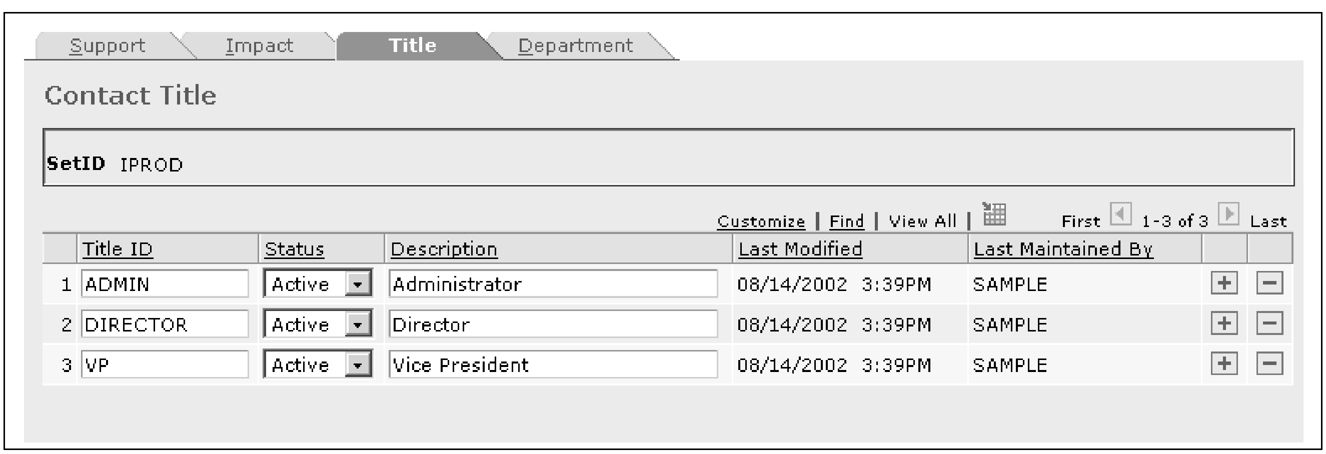
Impact levels appear on the Impact tab in the Contact grid of the Lead - Discover and Opportunity - Discover pages.

See Also

Chapter 10, “Creating Sales Leads and Opportunities,” Selecting Customer Contacts for a Lead or Opportunity, page 126

Setting Up Contact Titles

Access the Contact Title page.



Contact Title page

Create titles (for example, *Administrator, Director,* and *Vice President*) that enable PeopleSoft Sales users to identify a contact's position in the customer's organization.

Note. The contact titles that you set up here are different from the contact roles, which are set up on the Contact Roles page and are used on the Contact tab. Contact roles are more detailed than titles. For example, you might set up vice president as a title and vice president of purchasing as a role.

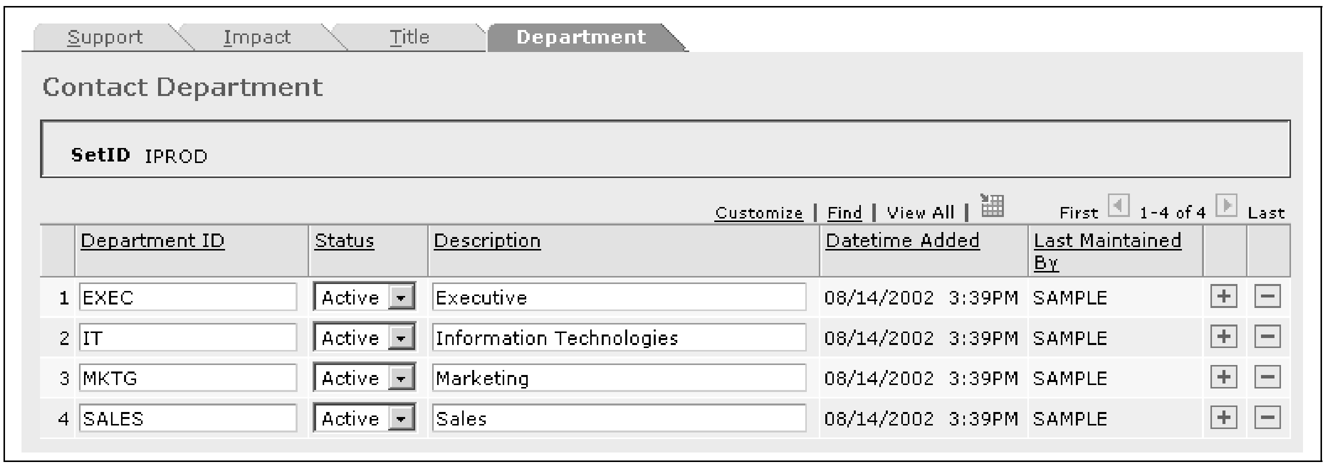
Titles appear on the Organization tab in the Contacts grid of the Lead - Discover and Opportunity - Discover pages.

See Also

Chapter 10, "Creating Sales Leads and Opportunities," Selecting Customer Contacts for a Lead or Opportunity, page 126

Setting Up Contact Departments

Access the Contact Department page.



Contact Department page

Create departments (for example, *Executive*, *IT*, *Marketing*, and *Sales)* that enable PeopleSoft Sales users to identify the department that a contact belongs to in the customer's organization.

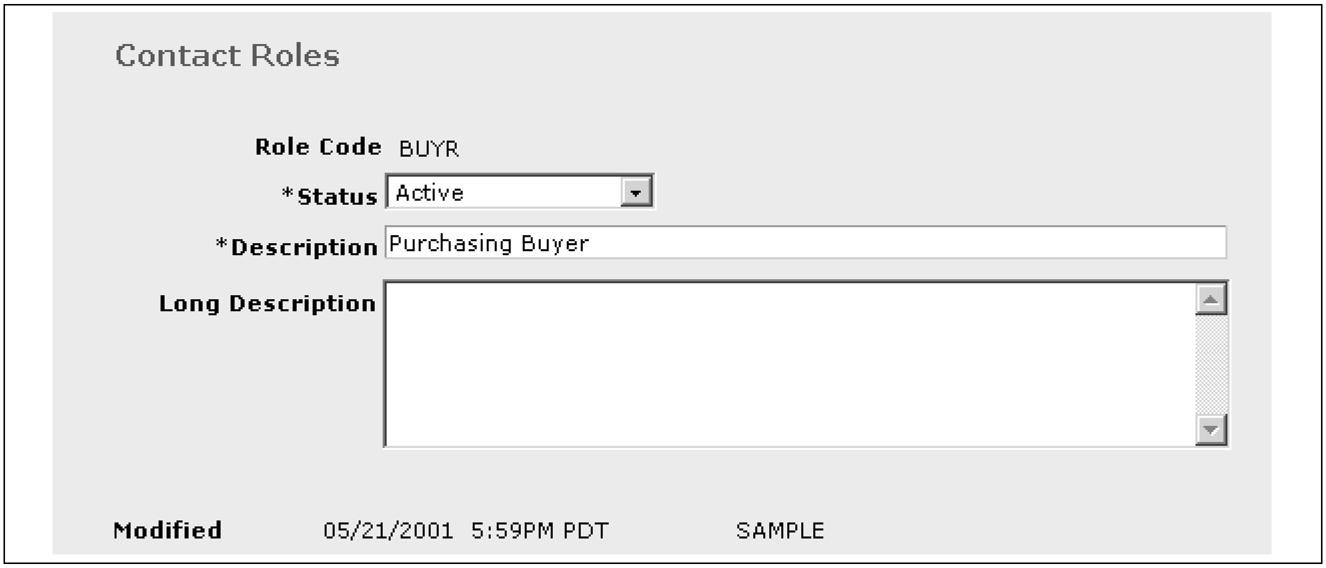
Departments appear on the Organization tab in the Contact grid of the Lead - Discover and Opportunity - Discover pages.

See Also

Chapter 10, "Creating Sales Leads and Opportunities," Selecting Customer Contacts for a Lead or Opportunity, page 126

Setting Up Contact Roles

Access the Contact Roles page.



Contact Roles page

Define roles (for example, *Purchasing Manager, Purchasing Broker,* and *Vice President of Purchasing)* that enable PeopleSoft Sales users to identify the role that a contact has within the customer's organization.

Contact roles appear on the Contact tab in the Contacts grid of the Lead - Discover and Opportunity - Discover pages.

See Also

Chapter 10, "Creating Sales Leads and Opportunities," Selecting Customer Contacts for a Lead or Opportunity, page 126

Setting Up Sales Partners

To set up sales partners, use the Sales Partner component (RSF_PARTNER).

This section discusses how to:

- Set up business partners and contacts.
- Set up partner roles.
- Set up partner status values.
- Set up partner types.
- Set up partner ratings.

Note. PeopleSoft Enterprise Sales has basic functionality for sales partners. For more robust functionality, use PeopleSoft Partner Relationship Management (PRM). This section only applies if you do not use PeopleSoft PRM. If you use PeopleSoft PRM, you should use it to set up your sales partners.

See *PeopleSoft Enterprise CRM Partner Relationship Management PeopleBook.*

Pages Used to Set Up Sales Partners

Page Name	Object Name	Navigation	Usage
Role Type	BO_ROLE_TYPE	Set Up CRM, Common Definitions, Customer, Role Type	Set up the role type of *Partner* to describe the relationship of sales partners.
Configure Relationship Views	BO_REL_VWCFG	Set Up CRM, Common Definitions, Customer, Configure Relationship Views	Configure the partner relationship.
Company	RD_COMPANY_MAIN_2	Customers CRM, Company	Create companies as sales partners.
Partner Role	RSF_PARTNR_ROLE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Partner, Partner Role	Define roles to use to describe the role of a partner on your sales team.
Partner Status	RSF_PARTNR_STAT	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Partner, Partner Status	Define statuses to use for partner activity on your sales team.
Partner Type	RSF_PARTNR_TYPE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Partner, Partner Type	Define types to describe partners on your sales team.
Partner Rating	RSF_PARTNR_RATE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Partner, Partner Rating	Define ratings to use to describe partners on your sales team.

Setting Up Business Partners and Contacts

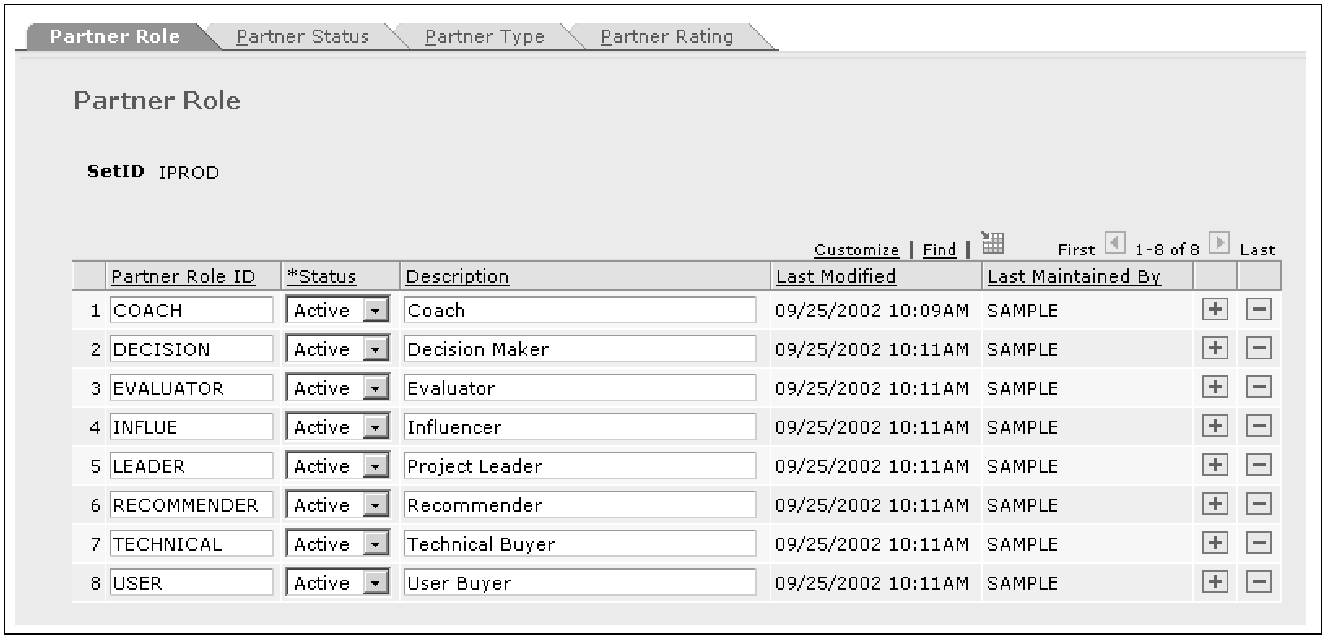
Access the Company page.

Enter the following information for the external companies or consultants that you want to set up as partners: business names, addresses, phone numbers, and the names of the contacts.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Defining Company Business Objects,” Maintaining General Company Information.

Setting Up Partner Roles

Access the Partner Role page.



Partner Role | Partner Status | Partner Type | Partner Rating

Partner Role

SetID IPROD

Customize | Find | First 1-8 of 8 Last

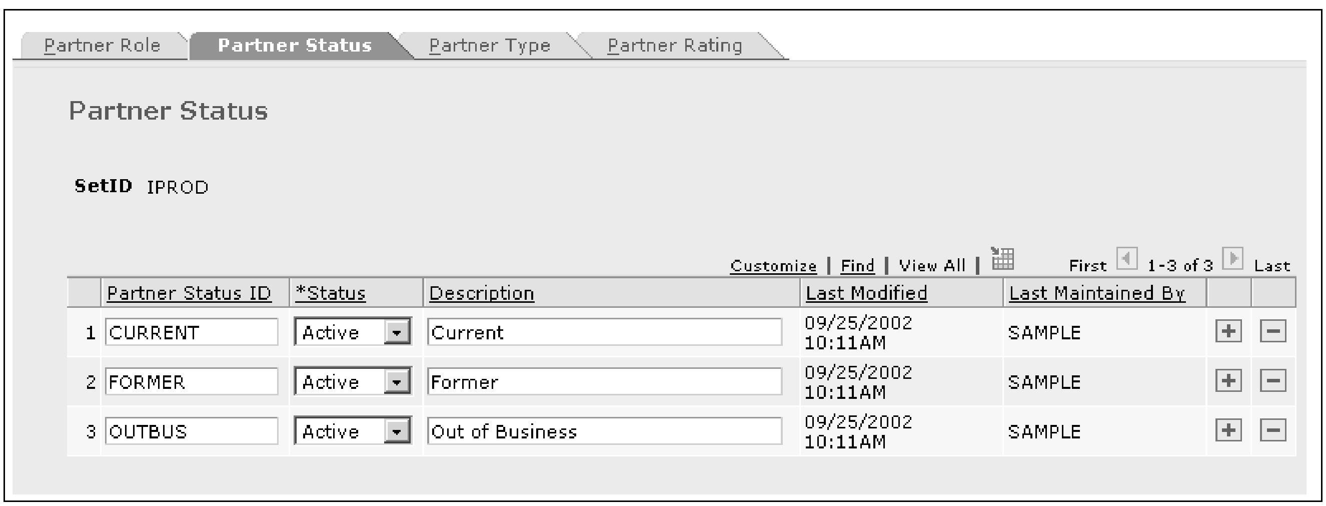
	Partner Role ID	*Status	Description	Last Modified	Last Maintained By
1	COACH	Active	Coach	09/25/2002 10:09AM	SAMPLE
2	DECISION	Active	Decision Maker	09/25/2002 10:11AM	SAMPLE
3	EVALUATOR	Active	Evaluator	09/25/2002 10:11AM	SAMPLE
4	INFLUE	Active	Influencer	09/25/2002 10:11AM	SAMPLE
5	LEADER	Active	Project Leader	09/25/2002 10:11AM	SAMPLE
6	RECOMMENDER	Active	Recommender	09/25/2002 10:11AM	SAMPLE
7	TECHNICAL	Active	Technical Buyer	09/25/2002 10:11AM	SAMPLE
8	USER	Active	User Buyer	09/25/2002 10:11AM	SAMPLE

Partner Role page

Enter a partner role ID, status, and description (for example, *Coach*, *Decision Maker*, and *Evaluator)* to identify the role of a partner. Add rows to create as many partner roles as you need.

Setting Up Partner Status Values

Access the Partner Status page.



Partner Role | Partner Status | Partner Type | Partner Rating

Partner Status

SetID IPROD

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

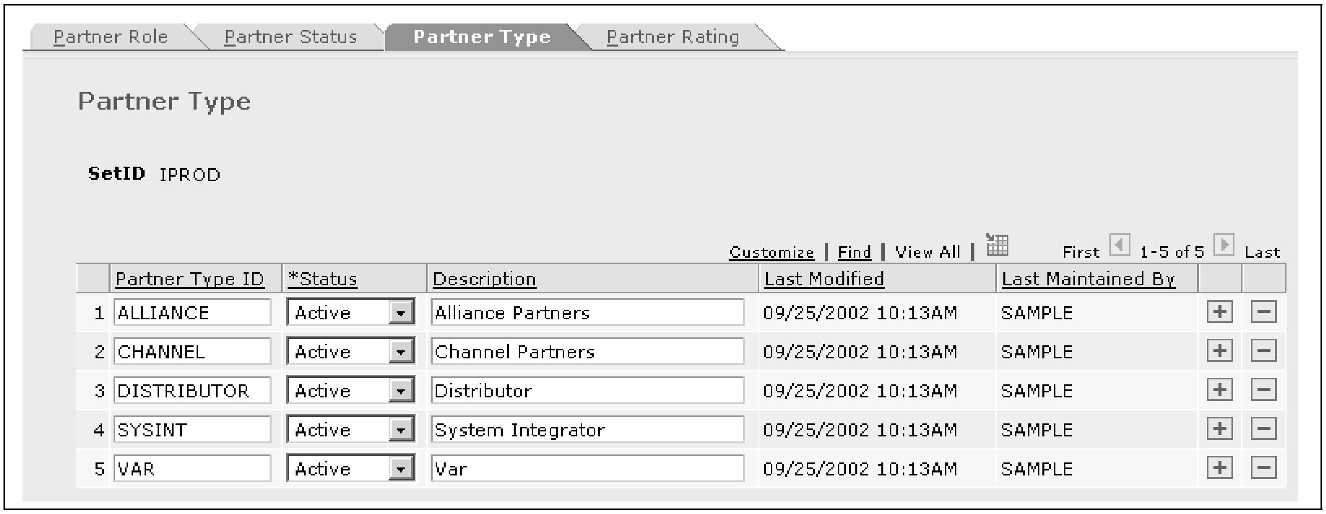
	Partner Status ID	*Status	Description	Last Modified	Last Maintained By
1	CURRENT	Active	Current	09/25/2002 10:11AM	SAMPLE
2	FORMER	Active	Former	09/25/2002 10:11AM	SAMPLE
3	OUTBUS	Active	Out of Business	09/25/2002 10:11AM	SAMPLE

Partner Status page

Enter a partner status ID, status, and description (for example, *Current*, *Former,* and *Out of Business)* to identify the status of a partner's relationship with your organization. Add rows to create as many partner statuses as you need.

Setting Up Partner Types

Access the Partner Type page.



Partner Role | Partner Status | **Partner Type** | Partner Rating

Partner Type

SetID IPROD

Customize | Find | View All | First 1-5 of 5 Last

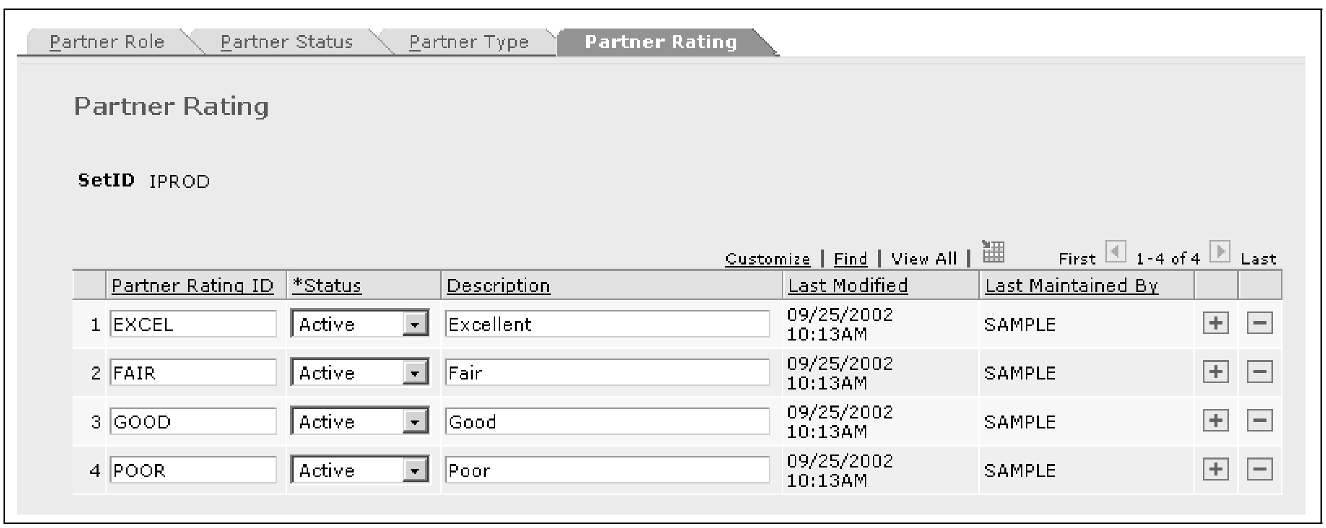
	Partner Type ID	*Status	Description	Last Modified	Last Maintained By
1	ALLIANCE	Active	Alliance Partners	09/25/2002 10:13AM	SAMPLE
2	CHANNEL	Active	Channel Partners	09/25/2002 10:13AM	SAMPLE
3	DISTRIBUTOR	Active	Distributor	09/25/2002 10:13AM	SAMPLE
4	SYSINT	Active	System Integrator	09/25/2002 10:13AM	SAMPLE
5	VAR	Active	Var	09/25/2002 10:13AM	SAMPLE

Partner Type page

Enter a partner type ID, status, and description (for example, *Alliance Partners, Channel Partners,* and *Distributor)* to identify the types of partners that your organization has. Add rows to create as many partner types as you need.

Setting Up Partner Ratings

Access the Partner Rating page.



Partner Role | Partner Status | Partner Type | **Partner Rating**

Partner Rating

SetID IPROD

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

	Partner Rating ID	*Status	Description	Last Modified	Last Maintained By
1	EXCEL	Active	Excellent	09/25/2002 10:13AM	SAMPLE
2	FAIR	Active	Fair	09/25/2002 10:13AM	SAMPLE
3	GOOD	Active	Good	09/25/2002 10:13AM	SAMPLE
4	POOR	Active	Poor	09/25/2002 10:13AM	SAMPLE

Partner Rating page

Enter a partner rating, status, and description (for example, *Excellent, Fair, Good,* and *Poor)* to identify how you rate a partner's working relationship or proven success with your organization. Add rows to create as many partner ratings as you need.

Setting Up Sales Competitors

This section discusses how to:

- Set up the competitor relationship.

- Set up business competitors and contacts.

Pages Used to Set Up Sales Competitors

Page Name	Object Name	Navigation	Usage
Role Type	BO_ROLE_TYPE	Set Up CRM, Common Definitions, Customer, Role Type	Set up the role type of *Competitor* to apply to external competition.
Configure Relationship Views	BO_REL_VWCFG	Set Up CRM, Common Definitions, Customer, Configure Relationship Views	Configure the competitor relationship.
Company	RD_COMPANY_MAIN_2	Customers CRM, Company	Create companies as sales competitors.

Setting Up the Competitor Relationship

Access the Role Type page.

Set up the role type of *Competitor* to identify the relationship of an external company or consultant with whom you compete for sales. You must also configure the relationship, so that you can apply it to the external businesses.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, "Defining Control Values for Business Objects," Defining Role Types and Role Categories.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, "Defining Control Values for Business Objects," Defining Relationship Types and Relationship Categories.

Setting Up Business Competitors and Contacts

Access the Company page.

Enter information for the external companies or consultants that you want to set up as competitors.

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

Setting Up Buying Criteria

To set up buying criteria, use the Sales Buying Criteria component (RSF_NEEDS).

This section discusses how to:

- Set up buying criteria types.
- Set up buying criteria impact levels.
- Set up buying criteria priority levels.
- Set up buying criteria status values.

Note. The system does not display buying criteria fields on the Lead - Propose and Opportunity - Propose pages unless you use display templates to specify that you want to display the buying criteria fields.

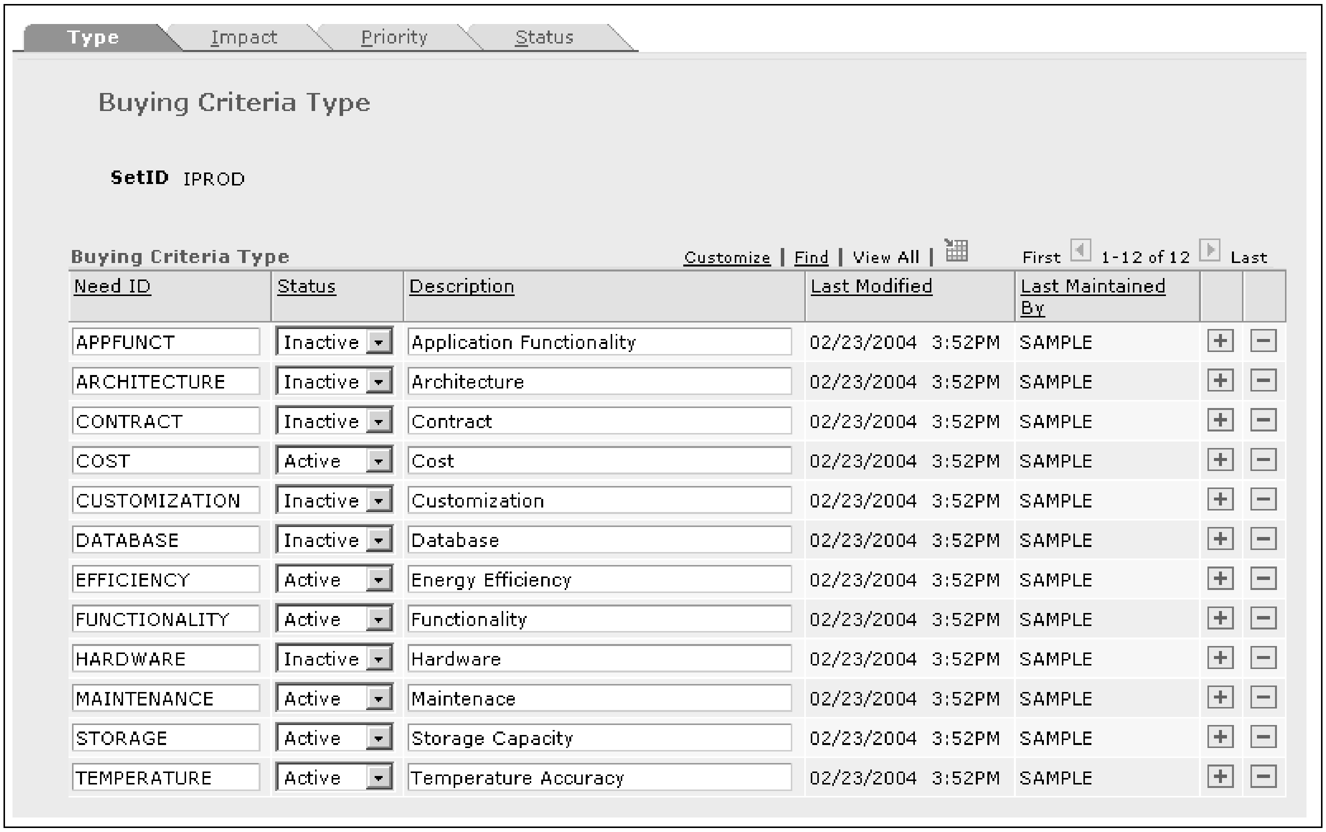
See Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up Display Templates for Leads and Opportunities, page 61.

Pages Used to Set Up Buying Criteria

Page Name	Object Name	Navigation	Usage
Buying Criteria Type	RSF_NEED_TYPE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Buying Criteria, Buying Criteria Type	Define types to use to describe customer buying criteria.
Buying Criteria Impact	RSF_NEED_IMPACT	Set Up CRM, Product Related, Lead and Opportunity, Sales, Sales Buying Criteria, Buying Criteria Impact	Define impacts to use to describe customer buying criteria.
Buying Criteria Priority	RSF_NEED_PRIORITY	Set Up CRM, Product Related, Lead and Opportunity, Sales, Sales Buying Criteria, Buying Criteria Priority	Define priority levels to use to describe customer buying criteria.
Buying Criteria Status	RSF_NEED_STATUS	Set Up CRM, Product Related, Lead and Opportunity, Sales, Sales Buying Criteria, Buying Criteria Status	Define statuses to use to describe customer buying criteria.

Setting Up Buying Criteria Types

Access the Buying Criteria Type page.



Type | Impact | Priority | Status

Buying Criteria Type

SetID IPROD

Buying Criteria Type — Customize | Find | View All | First 1-12 of 12 Last

Need ID	Status	Description	Last Modified	Last Maintained By
APPFUNCT	Inactive	Application Functionality	02/23/2004 3:52PM	SAMPLE
ARCHITECTURE	Inactive	Architecture	02/23/2004 3:52PM	SAMPLE
CONTRACT	Inactive	Contract	02/23/2004 3:52PM	SAMPLE
COST	Active	Cost	02/23/2004 3:52PM	SAMPLE
CUSTOMIZATION	Inactive	Customization	02/23/2004 3:52PM	SAMPLE
DATABASE	Inactive	Database	02/23/2004 3:52PM	SAMPLE
EFFICIENCY	Active	Energy Efficiency	02/23/2004 3:52PM	SAMPLE
FUNCTIONALITY	Active	Functionality	02/23/2004 3:52PM	SAMPLE
HARDWARE	Inactive	Hardware	02/23/2004 3:52PM	SAMPLE
MAINTENANCE	Active	Maintenace	02/23/2004 3:52PM	SAMPLE
STORAGE	Active	Storage Capacity	02/23/2004 3:52PM	SAMPLE
TEMPERATURE	Active	Temperature Accuracy	02/23/2004 3:52PM	SAMPLE

Buying Criteria Type page

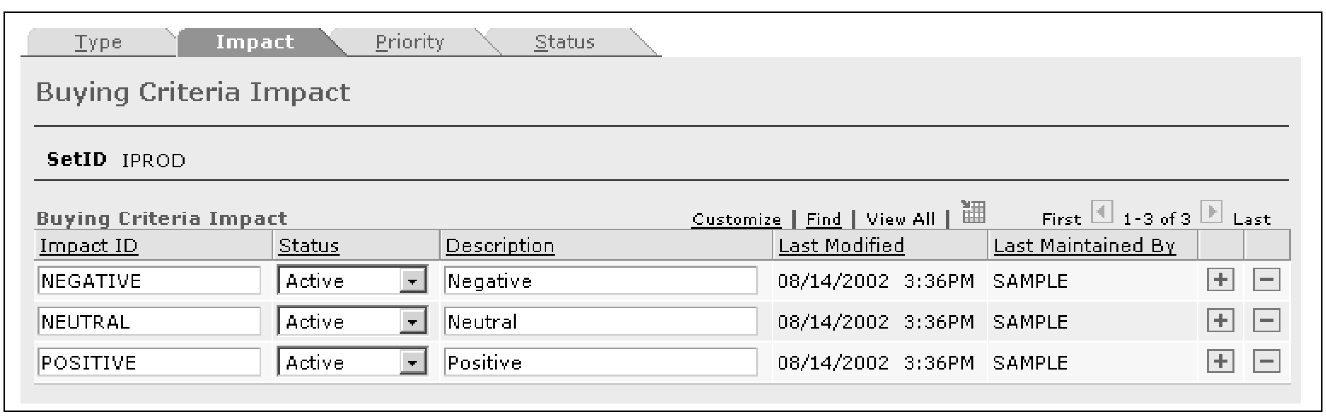
Enter a buying criteria ID, status, and description (for example, *Application Functionality, Contract Terms*, and*Customization*) to identify the types of needs that influence a customer to purchase. Add rows to create as many types as you need.

See Also

Chapter 13, “Qualifying a Lead or Opportunity,” page 161

Setting Up Buying Criteria Impact Levels

Access the Buying Criteria Impact page.



Type | Impact | Priority | Status

Buying Criteria Impact

SetID IPROD

Buying Criteria Impact — Customize | Find | View All | First 1-3 of 3 Last

Impact ID	Status	Description	Last Modified	Last Maintained By
NEGATIVE	Active	Negative	08/14/2002 3:36PM	SAMPLE
NEUTRAL	Active	Neutral	08/14/2002 3:36PM	SAMPLE
POSITIVE	Active	Positive	08/14/2002 3:36PM	SAMPLE

Buying Criteria Impact page

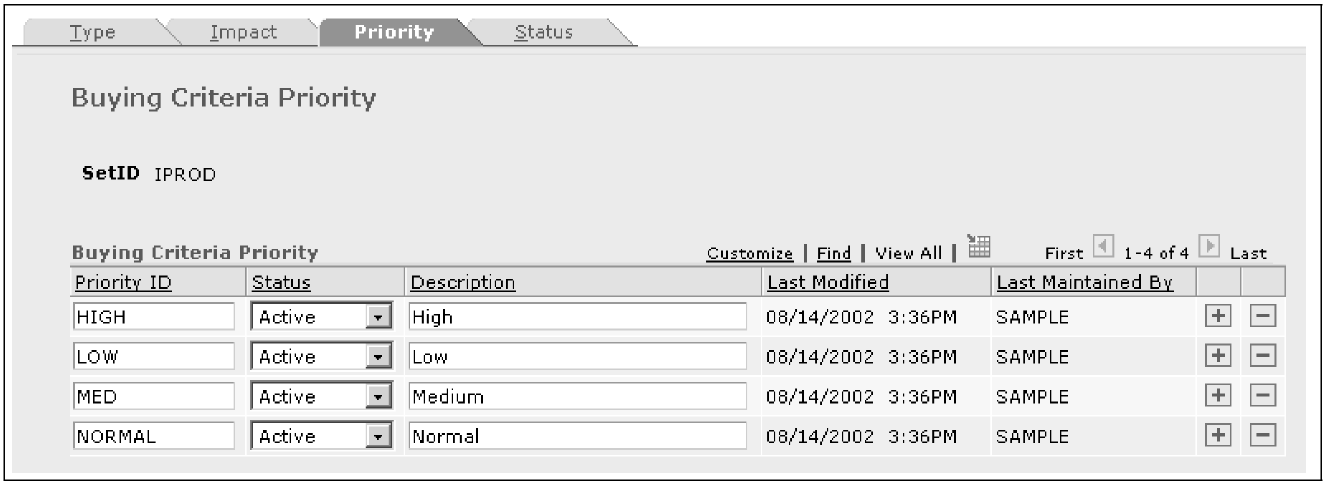
Enter an impact ID, status, and description (for example, *Negative*, *Neutral,* and *Positive)* to identify the impact of buying criteria on the customer's decision to purchase. Add rows to create as many impacts as you need.

See Also

Chapter 13, "Qualifying a Lead or Opportunity," page 161

Setting Up Buying Criteria Priority Levels

Access the Buying Criteria Priority page.



Buying Criteria Priority page

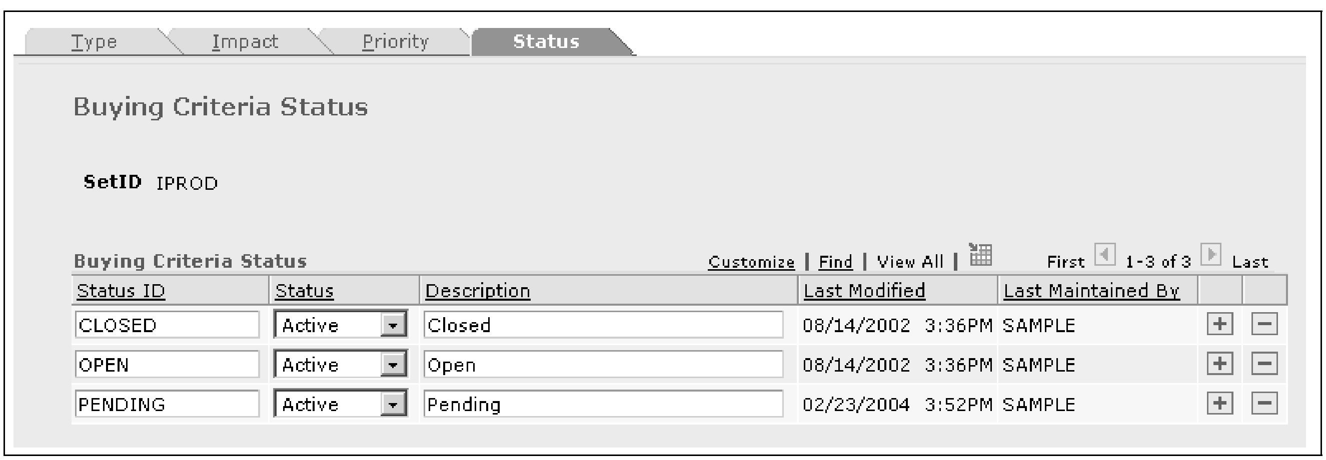
Enter a priority ID, status, and description (for example, *High, Low, Medium,* and *Normal)* to identify the priority of a customer's need for a product. Add rows to create as many need priorities as necessary.

See Also

Chapter 13, "Qualifying a Lead or Opportunity," page 161

Setting Up Buying Criteria Status Values

Access the Buying Criteria Status page.



Buying Criteria Status page

Enter a status ID, status (*Active* or *Inactive*), and description to identify the status of a customer's need for a product. For example, you might create a buying criteria status of *Closed* or *Open*. Add rows to create as many status levels as you need.

See Also

Chapter 13, "Qualifying a Lead or Opportunity," page 161

Setting Up Lead Sources

To set up a lead source, use the Lead Sources component (RSF_LEAD_SOURCE).

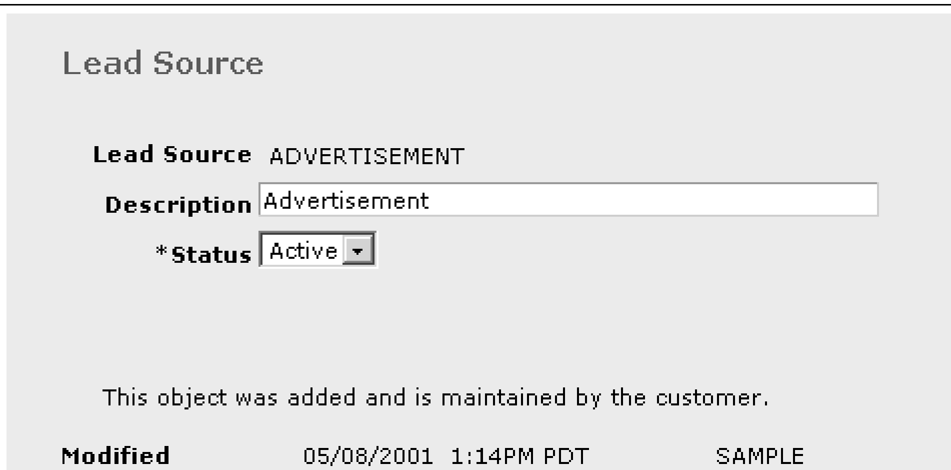
This section discusses how to set up a lead source.

Page Used to Set Up Lead Sources

Page Name	Object Name	Navigation	Usage
Lead Source	RSF_LEAD_SOURCE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Lead Sources	Identify common sources for leads.

Setting Up a Lead Source

Access the Lead Source page.



Lead Source page

Enter a description and status to identify each source from which leads typically come. PeopleSoft Sales delivers several predefined lead sources, including *Agreement, Case, Marketing, Online Marketing*, *Partner, Sales,* and *Telemarketing.* You can modify or delete these, and you can create as many additional lead sources as you need.

When a PeopleSoft Sales user enters a lead, the system uses *Sales* as the lead source, on the Lead - Qualify page.

Setting Up Fallout Reasons

To set up fallout reasons, use the Fallout Reason component (RSF_FALLOUT_RSN).

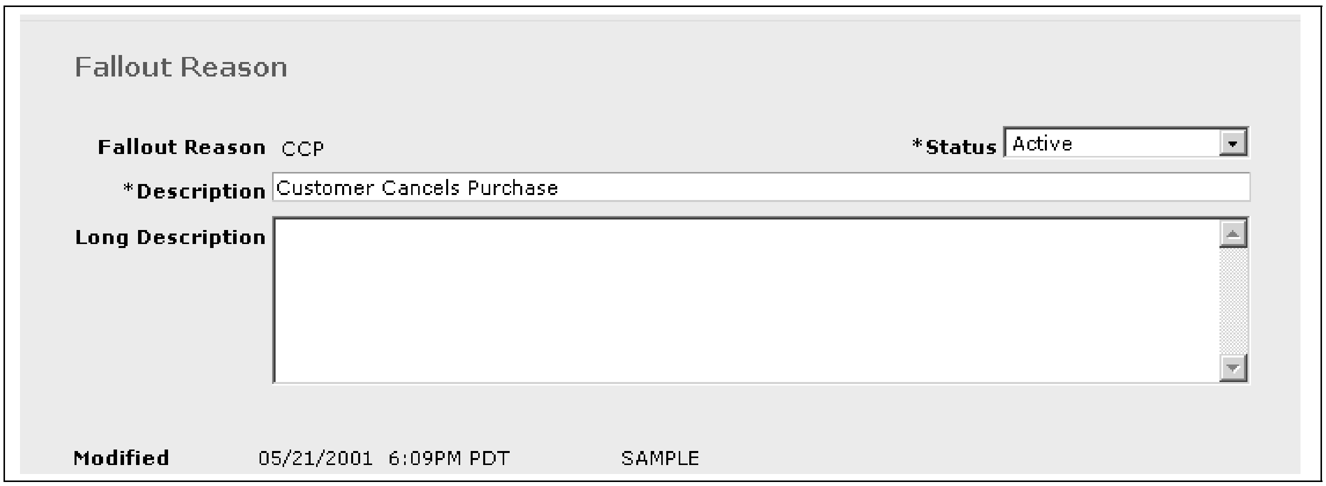
This section discusses how to set up fallout reasons.

Page Used to Set Up Fallout Reasons

Page Name	Object Name	Navigation	Usage
Fallout Reason	RSF_FALLOUT_RSN	Set Up CRM, Product Related, Sales, Lead and Opportunity, Fallout Reason	Define reasons to describe why an opportunity falls out of sales.

Setting Up Fallout Reasons

Access the Fallout Reason page.



Fallout Reason page

Enter a status, description, and long description (for example, *Customer Cancels Purchase, Lost Deal on Price,* and *Couldn't Meet Delivery Date)* to identify the reasons why an opportunity might fall out of sales. Create as many fallout reasons as you need.

Setting Up Pipeline Segments

To set up pipeline segments, use the Pipeline Segments component (RSF_SEGMENT).

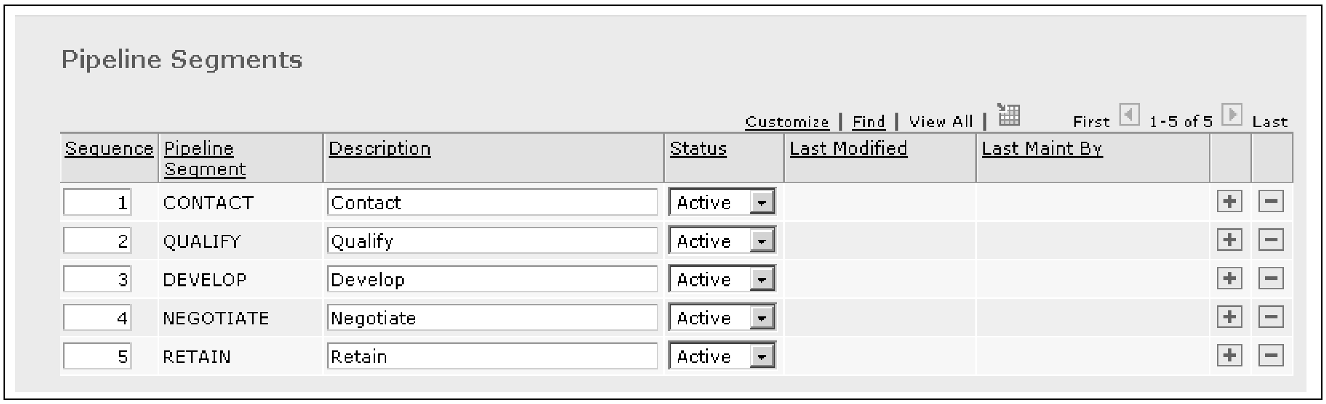
This section discusses how to define pipeline segments.

Page Used to Set Up Pipeline Segments

Page Name	Object Name	Navigation	Usage
Pipeline Segments	RSF_SEGMENT	Set Up CRM, Product Related, Sales, Lead and Opportunity, Pipeline Segment	Define pipeline segments to correlate to stages of your sales process.

Defining Pipeline Segments

Access the Pipeline Segments page.



Pipeline Segments page

Pipeline segments correlate to stages of your sales process. The default segments correlate to the stages of the KES process: *Contact, Qualify, Develop, Negotiate*, and *Retain.*

Enter a description and status to identify each pipeline segment to correlate it to the stages of your business process.

Add rows to create additional segments. The system provides default sequence numbers. You can override the sequence numbers to reorder the stages.

Pipeline segments appear on the Segment Pipeline page in the Review Pipeline component.

See Chapter 18, “Viewing the Opportunity Pipeline,” page 201.

Note. Other sales process definitions—for example, the Miller Heiman process—work equally well for defining pipeline segments.

Setting Up Sales Lead Import Templates

To set up sales lead import templates, use the Sales Lead Import Template component (RSF_IMP_TEMPLATE).

This section discusses how to:

- Create a lead import template.
- Rearrange fields on a template.
- View the import template map.

Understanding Lead Import Templates

When you import leads into PeopleSoft Sales, the system copies data from a spreadsheet to the Leads table and the Customer Data Model tables. Before you can import leads, you must set up a lead import template that specifies the mapping between the spreadsheet and the tables. PeopleSoft delivers a default template that can be used as-is, or additional templates can be created if needed. In setting up a lead import template, you use the Sales Lead Import Templates component to:

- Specify the fields to include in the import.
- Map the spreadsheet columns to fields in the Lead table.
- Set up duplicate checking for leads.
- Set up lookup criteria for Customer Data Model fields.

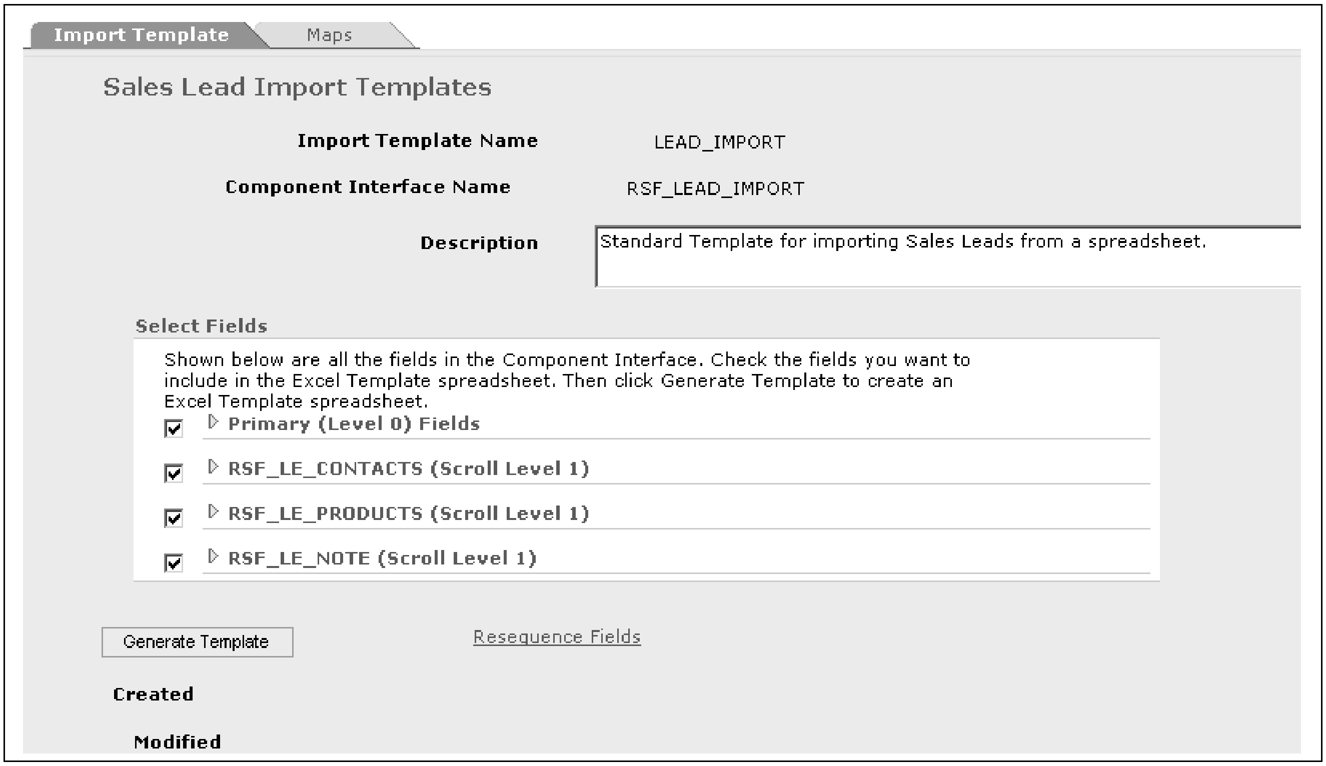
In addition, you can create a spreadsheet template that contains the column headings for fields that you import into PeopleSoft Sales.

Pages Used to Set Up Sales Lead Import Templates

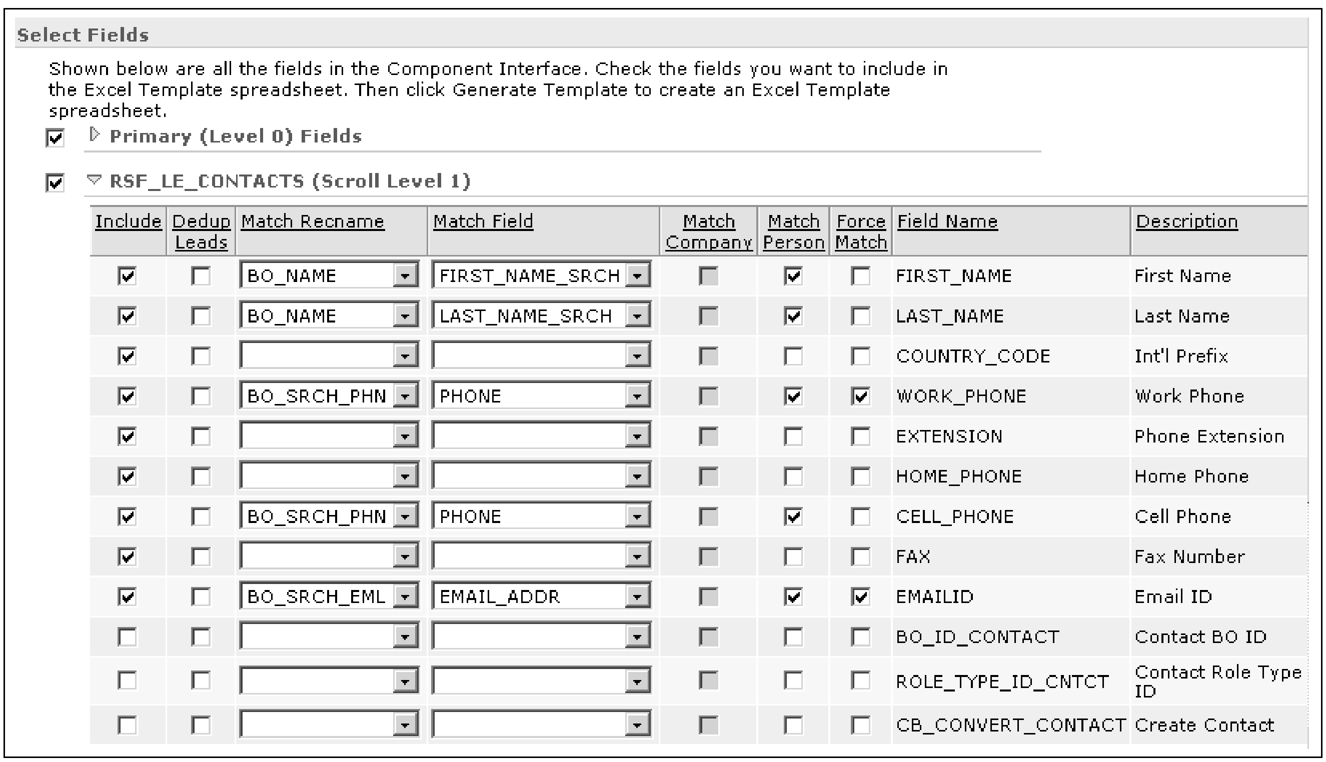
Page Name	Object Name	Navigation	Usage
Import Template	RB_IMP_TEMPLATE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Lead Import Templates	Create templates for importing sales lead data from comma-delimited spreadsheets.
Resequence Import Template	RB_IMP_SEQ_SEC	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Lead Import Templates Click the Resequence Fields link on the Import Template page.	Override sequence numbers to rearrange fields on a template.

Creating a Lead Import Template

Access the Import Template page.



Import Template page (1 of 2)



Import Template page (2 of 2)

Each level of the leads component interface is included as a collapsible section of the page. Each section lists all of the fields from that level. Select the fields to include in a Microsoft Excel spreadsheet to create a template for importing leads data.

Note. PeopleSoft delivers a default template called LEAD_IMPORT. In the default template, some fields do not have the Include check box selected. These are system fields that are part of the template for processing purposes, but would typically not be included in a spreadsheet containing data to be imported.

Note. Access the Address Format page to determine the fields used for address formats specific to a country.

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

Include Select to include the field in the import of lead data.

Dedup Leads Select to enable the system to use this field when searching for duplicate sales leads. If the system finds a sales lead with data that matches the spreadsheet data for all the fields checked for deduping, the lead will be marked as a duplicate and held for review.

Match Recname (match record name) Select the record in the Customer Data Model table in which the field is stored.

Match Field Select the field in the Customer Data Model record that is equivalent to the Field Name for the lead.

Match Company Select this check box for all fields that the system uses to compare existing company data in the Customer Data Model tables against imported data. If the system finds that the imported data for all fields with the Match Company check box selected matches existing data, then it will not add the company to the Customer Data Model tables.

Match Person Select this check box for all fields that the system uses to compare existing person data in the Customer Data Model tables against imported data. If the system finds that the imported data for all fields with the Match Person check box selected matches existing data, then it will not add the person to the Customer Data Model tables.

Force Match Select this check box to force a match of the imported data with the data in the Customer Data Model table. For example, an email address is typically unique and could be used to force a match of a contact.

Field Name and **Description** Displays the name and description of the field in the Leads table into which the data is imported.

Custom Label Enter the label or column heading in the spreadsheet from which the system should retrieve data for the field.

Resequence Fields Click to access the Resequence Import Template page, where you can override sequence numbers to reorder the fields in the template.

Generate Template Click to generate the template, after selecting the fields, specifying the custom labels, and resequencing the fields (if necessary).

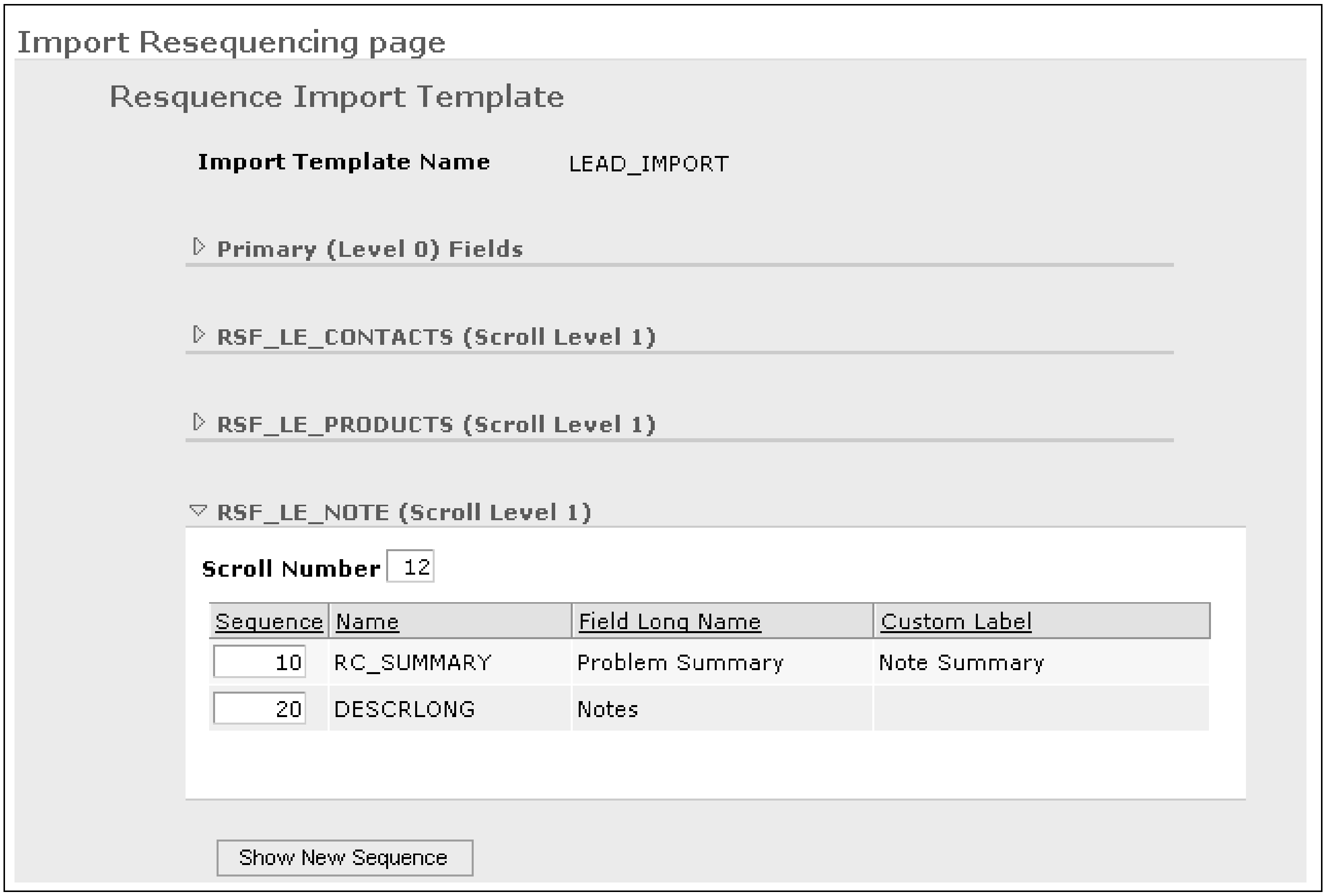
The system generates a Microsoft Excel spreadsheet template (only the column headers are provided) and launches it in a separate window. You can use this as a starting point to enter actual data into the spreadsheet.

Generating the template automatically saves the entire page. At any time after the page is saved, you can select the Maps tab to view a list of the column headings and see how the fields correlate to them.

Warning! If you manually change a column heading in the Excel spreadsheet, the mapping for that field is lost and the system cannot determine how to map that column to a database field.

Rearranging Fields on a Template

Access the Resequence Import Template page.



Import Resequencing page

Sequence

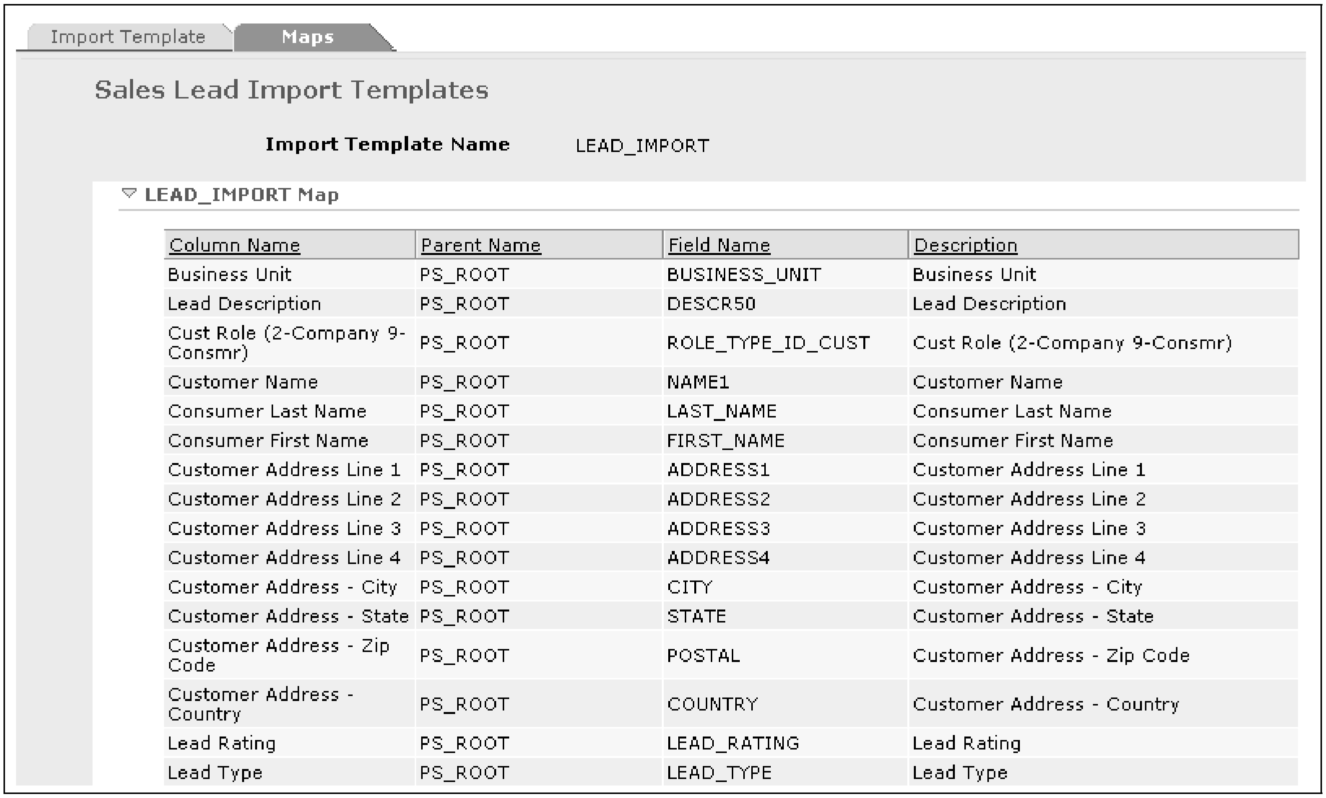
Override the numbers here to rearrange the component level fields, if necessary. Resequencing the fields here does so for the template only. It does not affect how fields appear on pages in the components.

Show New Sequence

Click to view the fields in the new sequential order. Then, click OK to accept the new sequence and return to the template page.

Viewing the Import Template Map

Access the Maps page.



Column Name	Parent Name	Field Name	Description
Business Unit	PS_ROOT	BUSINESS_UNIT	Business Unit
Lead Description	PS_ROOT	DESCR50	Lead Description
Cust Role (2-Company 9-Consmr)	PS_ROOT	ROLE_TYPE_ID_CUST	Cust Role (2-Company 9-Consmr)
Customer Name	PS_ROOT	NAME1	Customer Name
Consumer Last Name	PS_ROOT	LAST_NAME	Consumer Last Name
Consumer First Name	PS_ROOT	FIRST_NAME	Consumer First Name
Customer Address Line 1	PS_ROOT	ADDRESS1	Customer Address Line 1
Customer Address Line 2	PS_ROOT	ADDRESS2	Customer Address Line 2
Customer Address Line 3	PS_ROOT	ADDRESS3	Customer Address Line 3
Customer Address Line 4	PS_ROOT	ADDRESS4	Customer Address Line 4
Customer Address - City	PS_ROOT	CITY	Customer Address - City
Customer Address - State	PS_ROOT	STATE	Customer Address - State
Customer Address - Zip Code	PS_ROOT	POSTAL	Customer Address - Zip Code
Customer Address - Country	PS_ROOT	COUNTRY	Customer Address - Country
Lead Rating	PS_ROOT	LEAD_RATING	Lead Rating
Lead Type	PS_ROOT	LEAD_TYPE	Lead Type

Maps page

After you generate the template, view a list of the column headings to see how the fields correlate.

Setting Up the Summary Page for Leads and Opportunities

The Lead and Opportunity components contain a summary page that sales representatives and managers can use to view high level information about a lead and opportunity. PeopleSoft delivers a standard summary page for leads and opportunities. However, you can customize the summary page to meet your specific needs.

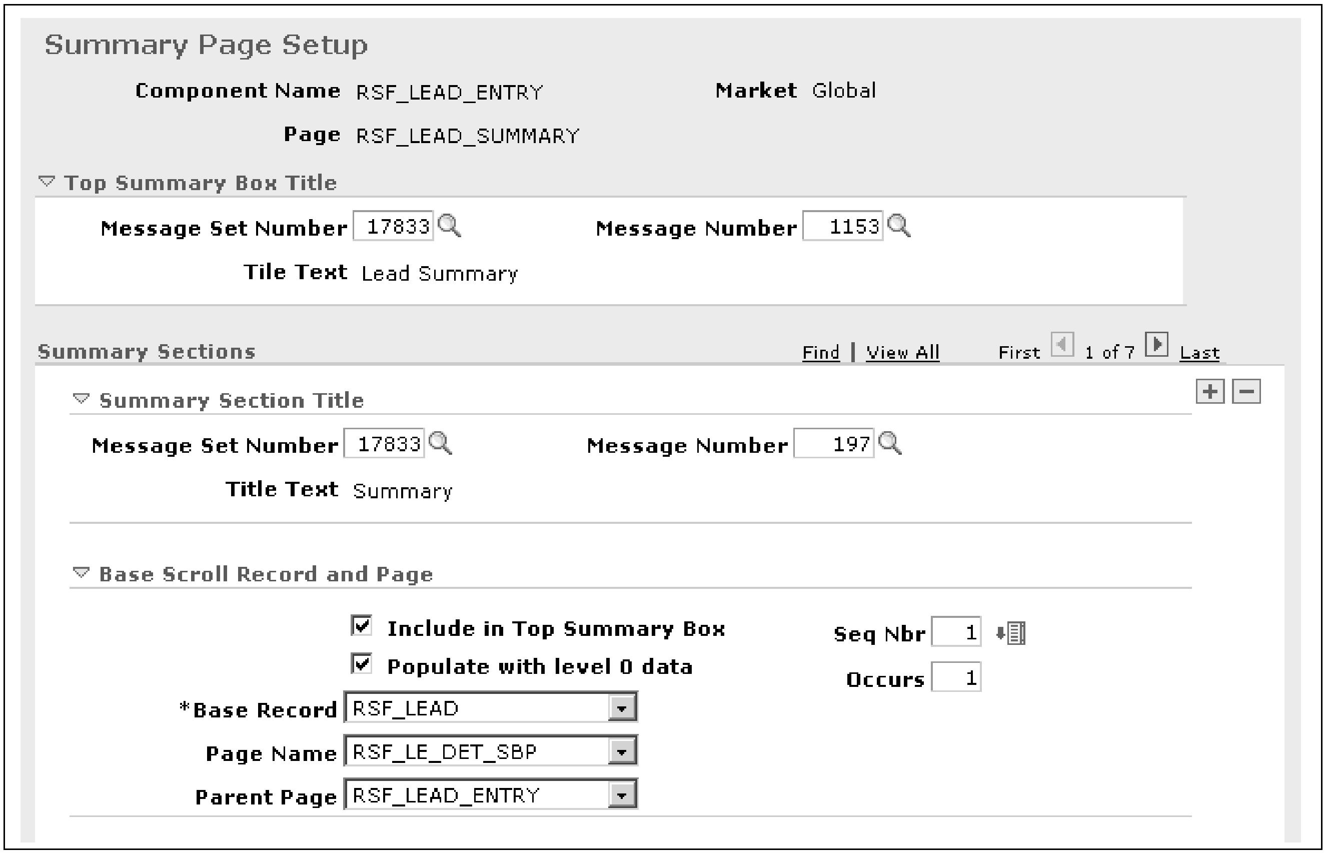
See Chapter 16, “Managing Leads and Opportunities,” Managing a Lead or Opportunity by Using the Summary, page 191.

Page Used to Set Up the Summary Page for Leads and Opportunities

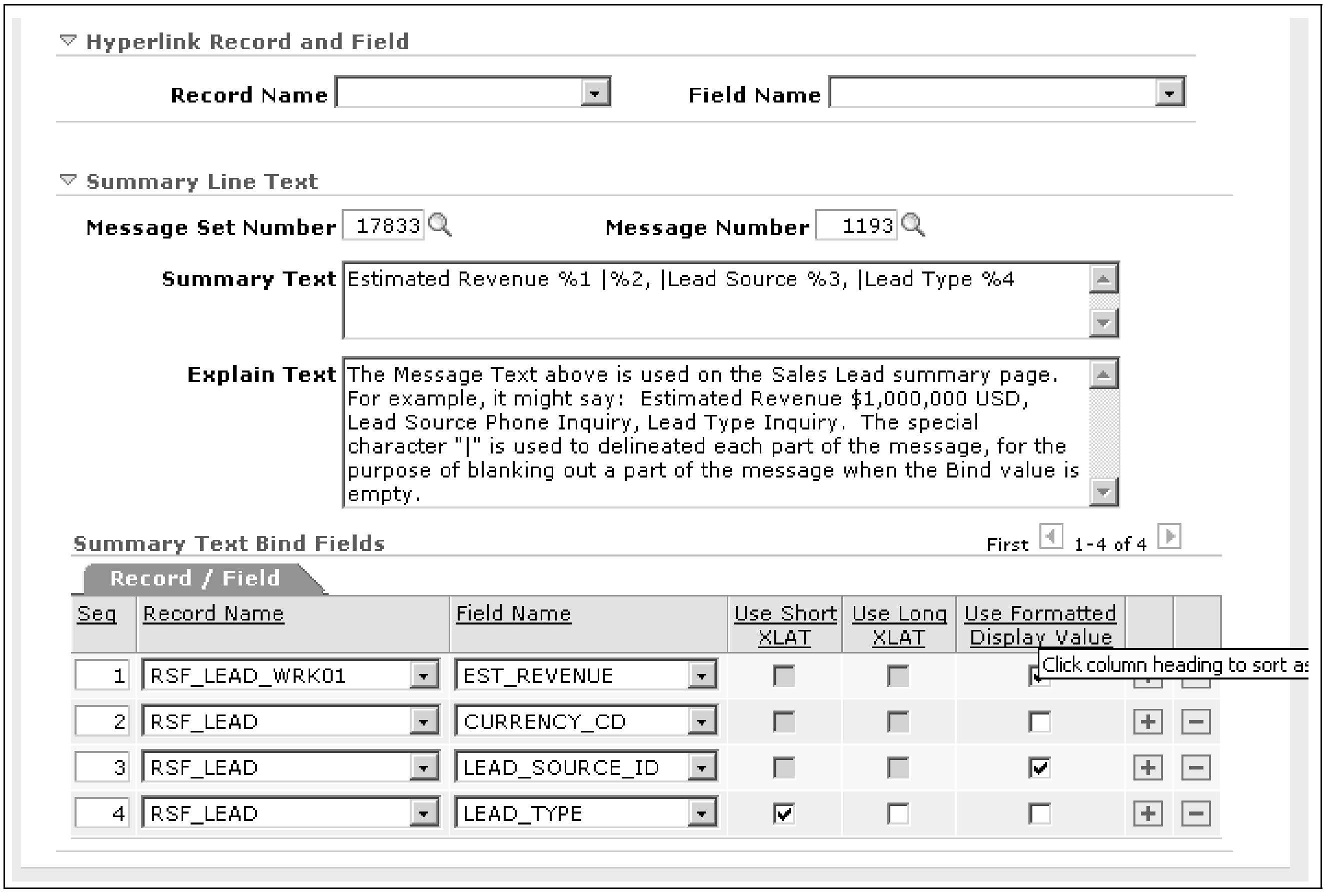
Page Name	Object Name	Navigation	Usage
Summary Page Setup	RB_SMRY_GRID	Set Up CRM, Common Definitions, Component Configuration, Summary Page Setup	Customize the summary page for leads and opportunities

Setting Up the Summary Page for Leads and Opportunities

Access the Summary Page Setup page.



Summary Page Setup page (1 of 2)



Summary Page Setup page (2 of 2)

Select *RSF_LEAD_ENTRY* as the Component Name to set up the summary page for leads or *RSF_OPPORTUNITY* as the Component Name to set up the summary page for opportunities.

It is recommended that you do not change the information in the Top Summary Box Title section.

Create a summary section for each topic that you want to include in the summary.

The delivered summary page for leads includes the following sections: summary, contacts, tasks, notes, team, products, and quotes.

The delivered summary page for opportunities includes the following sections: forecast, sales stage, contacts, tasks, notes, team, products, and quotes.

Message Set Number Enter the message set number for the PeopleSoft application. In most cases, you use *17833* (Sales Force Automation).

Message Number Enter the message number, which determines the section heading.

Title Text The system displays the text that it displays on the summary page. This text is based on what Message Number that you select.

Base Scroll Record and Page

Include in Top Summary Box Select this check box to include this section in the summary box at the top of the page.

Populate With level 0 data Check this box to indicate that the data being displayed in the section comes from level 0, as opposed to a scroll of information. For example, on the Lead - Summary page, level 0 information is from the highest level RSF_LEAD record, whereas a scroll of information is the list of contacts or products pertaining to the lead. Note that only the Top Summary Box can contain level 0 information.

Seq Nbr (sequence number) Enter a sequence number for the section.

Occurs Enter the number of rows to include in the section. For example, if the section contains a list of contacts, enter the number of contacts to show.

Resequence button Click this button to resequence the sections based on changes that you have made to the Seq Nbr field.

Base Record Select the record that contains the data that you want to display.

Page Name Select the page that you use to maintain and view the data that you want to display on the summary page.

Parent Page Select the parent page that you use to maintain and view the data that you want to display on the summary page. This is also where the system transfers the user when the user clicks a link on the summary page.

Hyperlink Record and Field

Record Name If you want to have a link in the section, enter the record that contains the field for which you want to create a link.

Field Name If you want to have a link in the section, enter the field for which you want to create a link.

Summary Line Text

Message Set Number Enter the message set number for the PeopleSoft application. In most cases, you use *17833* (Sales Force Automation).

Message Number Enter the message number, which determines the main text that the system displays in the section.

Summary Text The system displays the variables and text that is displays in the section. The variables are designated by the percent sign, followed by a number — *%1*. The number of the variables correspond to the numbers in the Summary Text Bind Fields section.

Explain Text The system displays an explanation of the text that it displays in the section.

Summary Text Bind Fields

Seq (sequence) Enter the sequence number. This number is associated with the variable number in the Summary Text field.

Record Name Select the record that contains the field that the system displays.

Field Name Select the field that the system displays.

Use Short XLAT If the field has translate values (also called XLAT values), selecting this check box indicates that you want to display the short translate value. For example, a LEAD_TYPE field might have a value of *QU* and a short translate value of *Qualified.* Check the Use Short XLAT check box to display *Qualified* on the summary page instead of *QU.*

Use Long XLAT If the field has translate values (also called XLAT values), selecting this check box indicates that you want to display the long translate value. For example, a LEAD_TYPE field might have a value of *QU* and a long translate value of *Qualified Lead.* Select the Use Long XLAT check box to display *Qualified Lead* on the summary page instead of *QU.*

Use Formatted Display Value Select this check box to display the formatted display value of the field. For example, for a currency field, you may want to display $1,000.00 instead of the raw data of 1000.

Setting Up Display Templates for Leads and Opportunities

PeopleSoft Sales has display templates that enable you to control the appearance and behavior of the Lead and Opportunity components for specific business needs. For the Opportunity component (RSF_OPPORTUNITY), PeopleSoft Sales has one display template named *CORE.* For the Lead component (RSF_LEAD_ENTRY), PeopleSoft Sales has three display templates:

- *CORE*

  Determines the appearance and behavior of the Lead component for enterprise users.

- *PRM_SALES*

  Determines the appearance and behavior of the Lead component for partner users.

- *FSI_SALES*

  Determines the appearance and behavior of the Lead component for wealth management referrals.

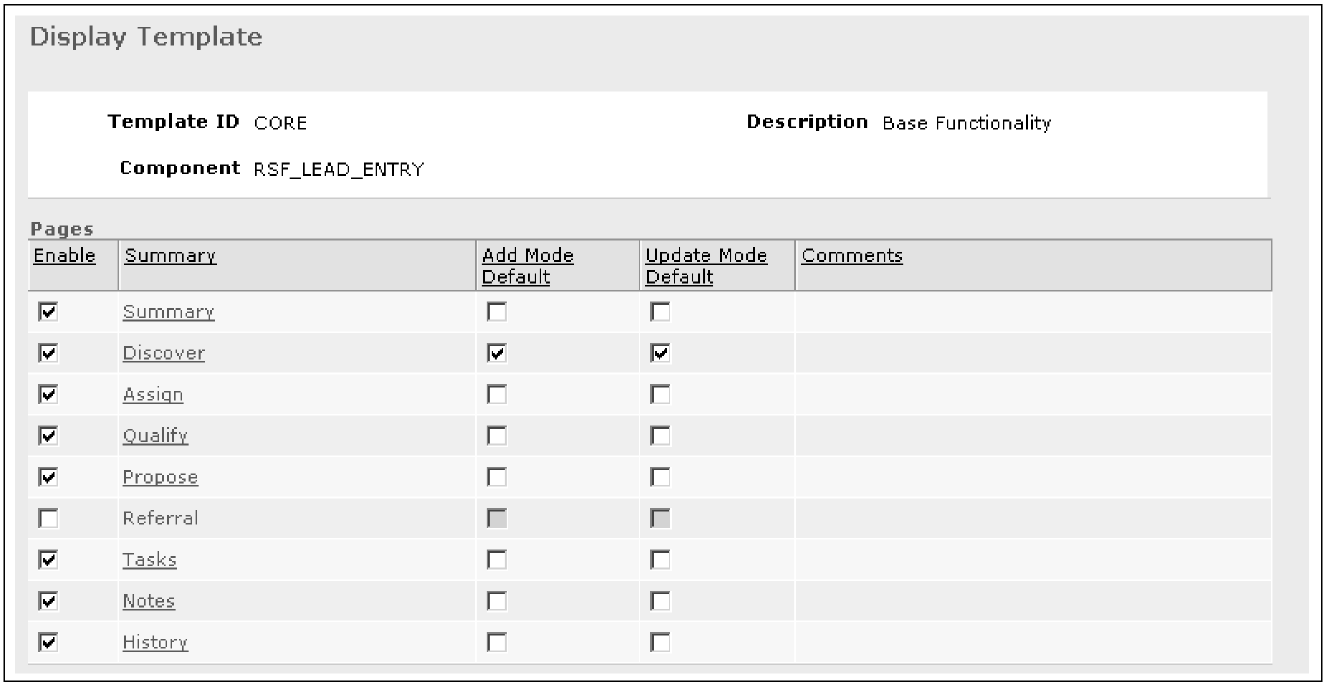
See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook,* “Configuring Display Templates”.

Page Used to Set Up Display Templates for Leads and Opportunities

Page Name	Object Name	Navigation	Usage
Display Template	RDT_TMPL_PAGE	Set Up CRM, Common Definitions, Component Configuration, Display Template Details	Set up display templates for leads and opportunities.
Display Template - Page Definition	RDT_TMPL_SECTN	From the Display Template page, select a page. Click the Show Section Details link. Select the Security tab for a section.	Use a functional option with the display template.

Setting Up Display Templates for Leads and Opportunities

Access the Display Template page.



Display Template

Template ID CORE

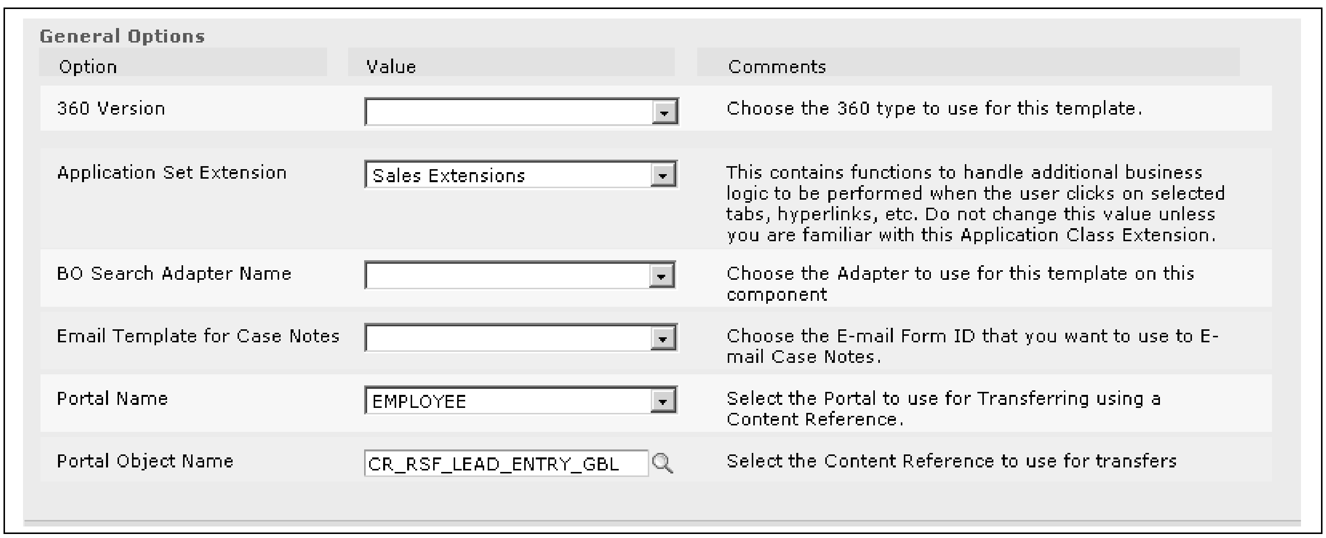
Description Base Functionality

Component RSF_LEAD_ENTRY

Pages

Enable	Summary	Add Mode Default	Update Mode Default	Comments
☑	Summary	☐	☐	
☑	Discover	☑	☑	
☑	Assign	☐	☐	
☑	Qualify	☐	☐	
☑	Propose	☐	☐	
☐	Referral	☐	☐	
☑	Tasks	☐	☐	
☑	Notes	☐	☐	
☑	History	☐	☐	

Display Template page (1 of 2)



General Options

Option	Value	Comments
360 Version		Choose the 360 type to use for this template.
Application Set Extension	Sales Extensions	This contains functions to handle additional business logic to be performed when the user clicks on selected tabs, hyperlinks, etc. Do not change this value unless you are familiar with this Application Class Extension.
BO Search Adapter Name		Choose the Adapter to use for this template on this component
Email Template for Case Notes		Choose the E-mail Form ID that you want to use to E-mail Case Notes.
Portal Name	EMPLOYEE	Select the Portal to use for Transferring using a Content Reference.
Portal Object Name	CR_RSF_LEAD_ENTRY_GBL	Select the Content Reference to use for transfers

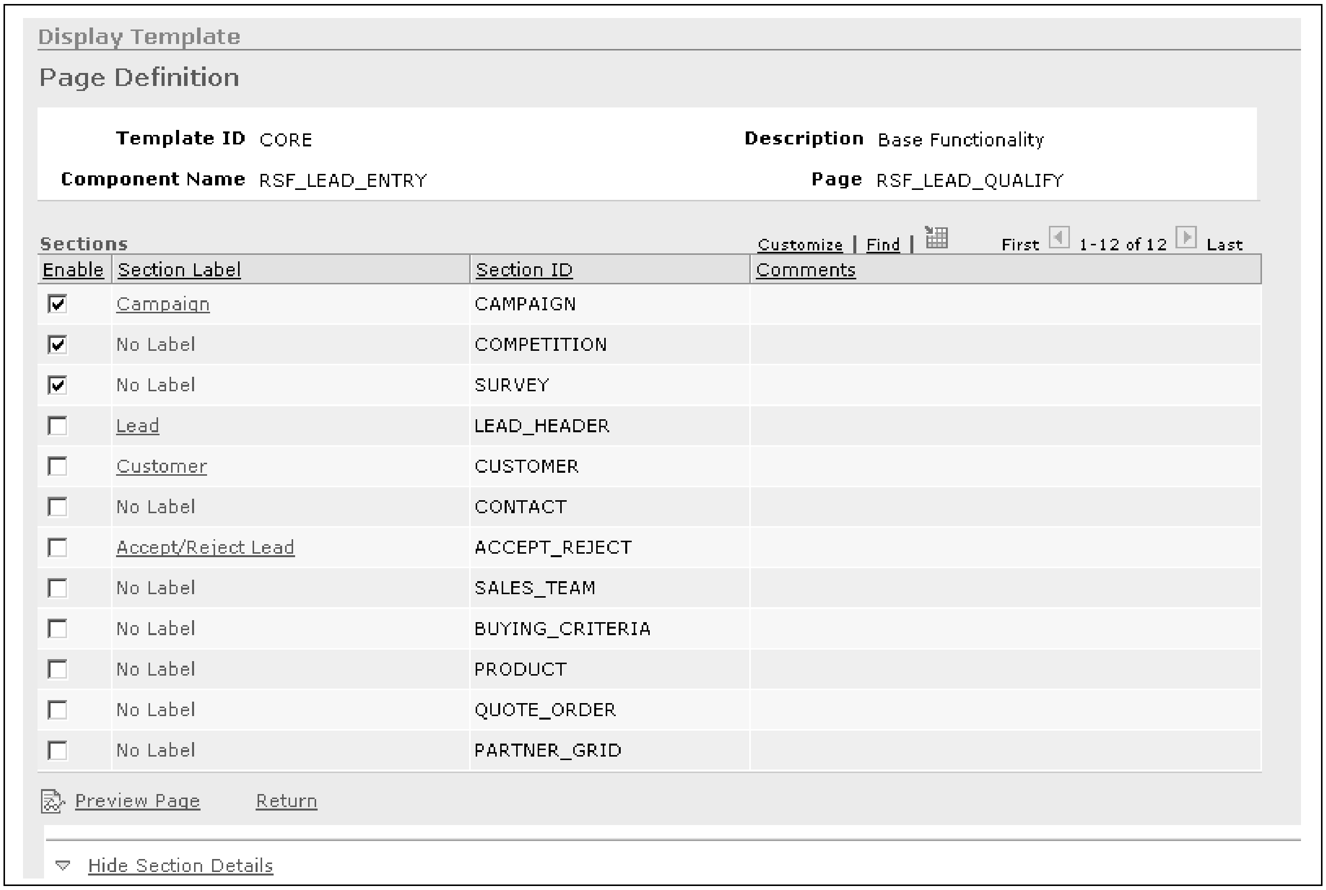
Display Template page (2 of 2)

The following table contains the default configuration for the pages defined for the *CORE* display template for the Lead and Opportunity components.

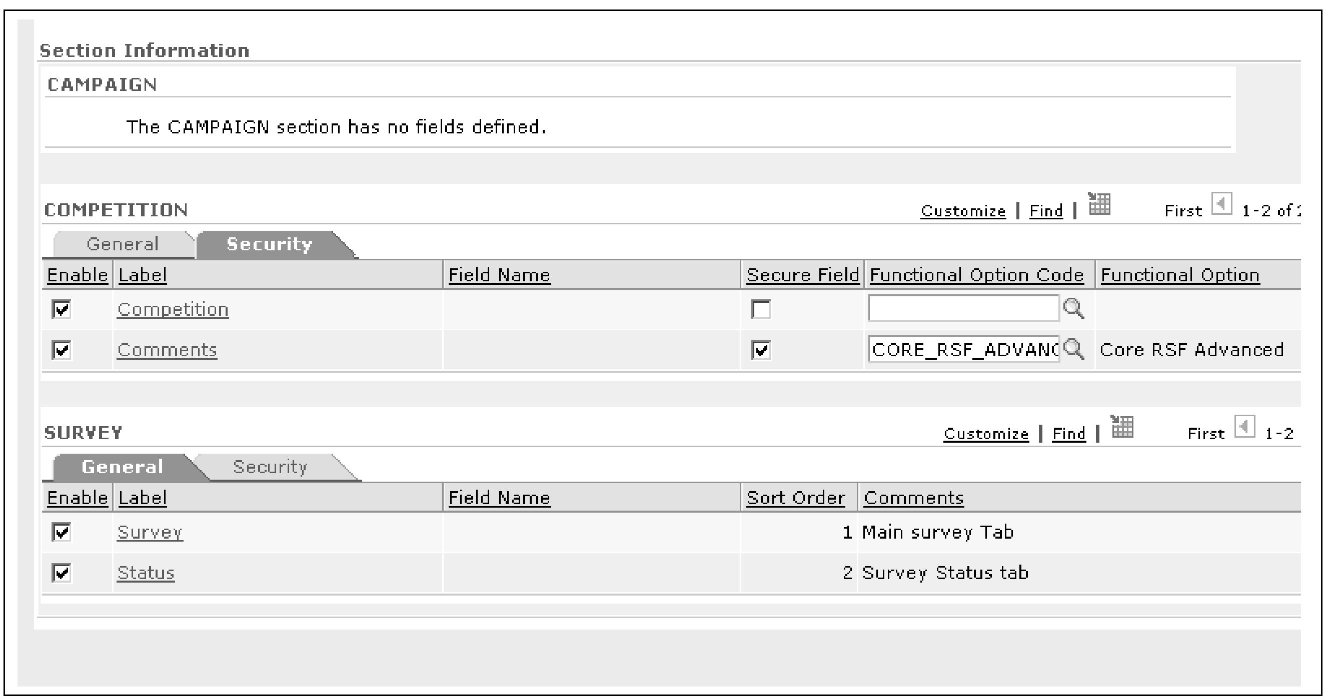
Page	Configuration
Summary	You configure the Summary page by using the Summary Page Setup page. See Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up the Summary Page for Leads and Opportunities, page 57. The functional option *CORE_RSF_SUMMARY* determines whether a user can view the Summary page. See Chapter 3, "Setting Up Sales Security and Personalization," Setting Up Functional Options, page 24.
Discover	Displays the following sections: Customer, Lead/Opportunity Details, Contacts, Accept/Reject. If you have installed PeopleSoft Partner Relationship Management, you should enable the Partner section on the display template.
Assign	Displays the Sales Team Members and Partner sections. If you have installed PeopleSoft Partner Relationship Management, you should disable the Partner section and enable Add Partner Rep section on the display template.
Qualify	Displays the Campaign, Competition and Survey sections.
Propose	Displays the Product and Quote/Order sections. For opportunities, it also displays the Forecast section.

Using a Functional Option With the Display Template

Access the Display Template - Page Definition page.



Display Template - Page Definition page (1 of 2)



Display Template - Page Definition page (2 of 2)

You can enter *CORE_RSF_ADVANCED* in the Functional Option Code field to either display or hide a field or grid tab in the Lead or Opportunity component depending on the setting of the functional option for a user.

See Chapter 3, "Setting Up Sales Security and Personalization," Setting Up Functional Options, page 24.

This table displays the grid tabs and fields in the delivered *CORE* display template for leads and opportunities that have *CORE_RSF_ADVANCED* in the Functional Option Code field.

Page - Section	Grid Tab or Field
Discover - Contacts	Phones tab, Impact tab, Organization tab, Correspondence tab
Assign - Sales Team Members	Territory tab, Additional Details tab, Comments tab
Qualify - Competition	Comments tab
Qualify - Survey	Status tab
Propose - Forecast (opportunity only)	Revenue Type field
Propose - Quote	Order tab, Audit tab

If you want to hide or display specific fields or grid tabs in the Lead or Opportunity component, you can edit the *CORE* display template.

CHAPTER 5

Setting Up Sales Forecasts

This chapter provides an overview of forecast setup and discusses how to define forecast elements.

Understanding Forecast Setup

Sales managers can use forecasts in PeopleSoft Sales to predict sales for a specific time period. You create a forecast in PeopleSoft Sales by uniquely identifying a forecast name and a time frame. The forecast name is a user-defined text field that you can use to describe characteristics of the forecast. The time frame specifies a particular week, month, quarter, or year.

For example, suppose the current date is April 1, 2004 and you are forecasting the sales of freezers for the third quarter of 2004 (July 1 to September 30). You generate forecasts monthly, so you expect to reforecast on May 1, 2004 and June 1, 2004. You can create three forecast names to meet your forecasting needs:

- Freezers: Apr
- Freezers: May
- Freezers: Jun

For the time frame, you must set up quarterly time frames in 2004. When you create a forecast, you then choose one of the forecast names and the third quarter 2004 time frame. Use the Time Frame component to set up time frames.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Defining Holiday Schedules,” Defining Holiday Schedules, Time Frames, and Sales Quota Rollups.

Defining Forecast Elements

To define forecast names, use the Forecast Names component (RSF_FCAST_ID).

To define forecast types, use the Forecast Type component (RSF_FCAST_TYPE).

To define revenue types, use the Revenue Type component (RSF_REV_TYPE).

This section discusses how to:

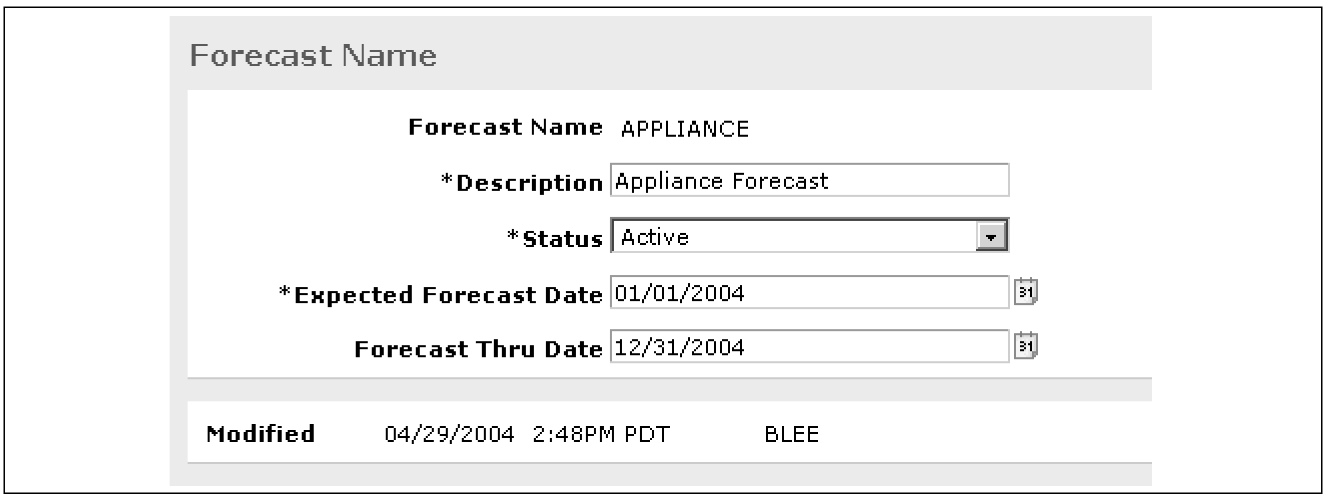
- Define forecast names.
- Define forecast types.
- Define revenue types.

Pages Used to Define Forecast Elements

Page Name	Object Name	Navigation	Usage
Forecast Name	RSF_FCAST_ID	Set Up CRM, Product Related, Sales, Forecast, Forecast Names	Define forecast names.
Forecast Type	RSF_FCAST_TYPE	Set Up CRM, Product Related, Sales, Forecast, Forecast Types	Define forecast types (user-defined classifications).
Revenue Type	RSF_REV_TYPE	Set Up CRM, Product Related, Sales, Forecast, Revenue Types	Define revenue types.

Defining Forecast Names

Access the Forecast Name page.



Forecast Name page

Expected Forecast Date

Enter the date on which the sales users can use the forecast name to generate a forecast.

For example, suppose today is May 1, 2004 and you are setting up a forecast name called Freezers:June for a forecast that will occur in June 2004. You do not want to make this forecast name available until June 2004, so you enter an Expected Forecast Date of June 1, 2004.

Forecast Thru Date (forecast through date)

Enter the ending date for forecasting.

For example, suppose you are going to stop selling a product at the end of 2004. In this case, establish a forecast name with a Forecast Thru Date of December 31, 2004. Sales users cannot use the forecast name to generate a forecast for the product for any time frames that begin after December 31, 2004.

The system generates a list of possible forecasts for a forecast name when there are time frame periods defined. For example, suppose you enter an expected forecast date of July 1, 2004 and a forecast through date of September 30, 2004. The system builds a list of possible forecasts using that forecast name and the following time frames:

- July, August and September 2004 (if you use monthly time frames).
- Third quarter 2004 (if you use quarterly time frames).
- 2004 (if you use yearly time frames).

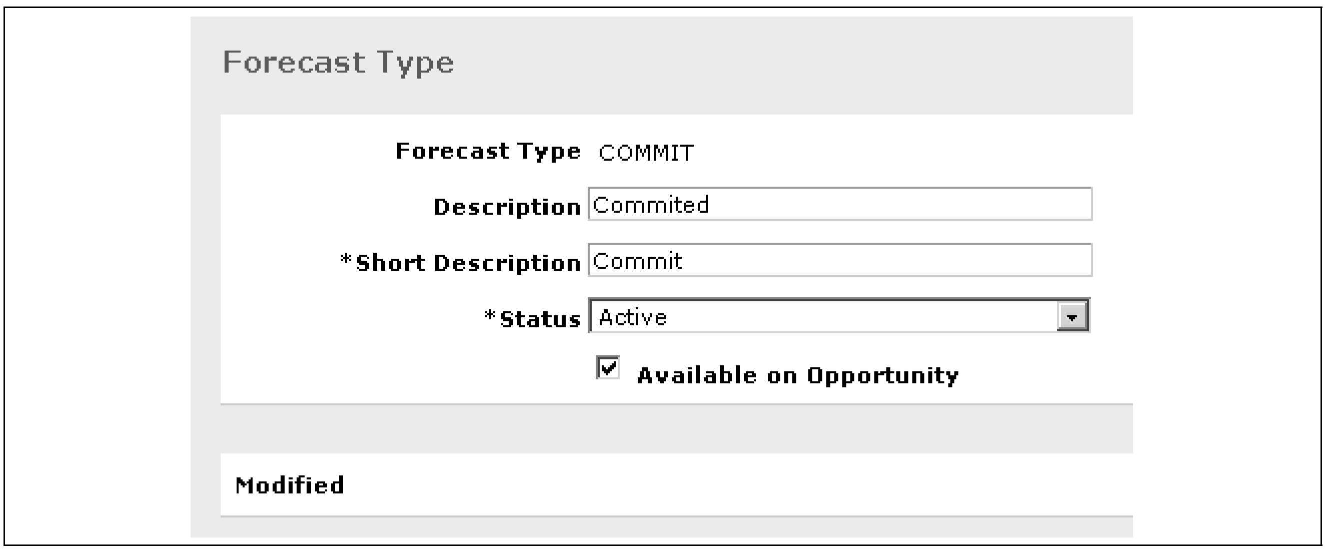
The system displays the list of possible forecasts on the Add Forecast and Search Forecasts components.

Use the Time Frame component to set up time frames.

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

Defining Forecast Types

Access the Forecast Type page.



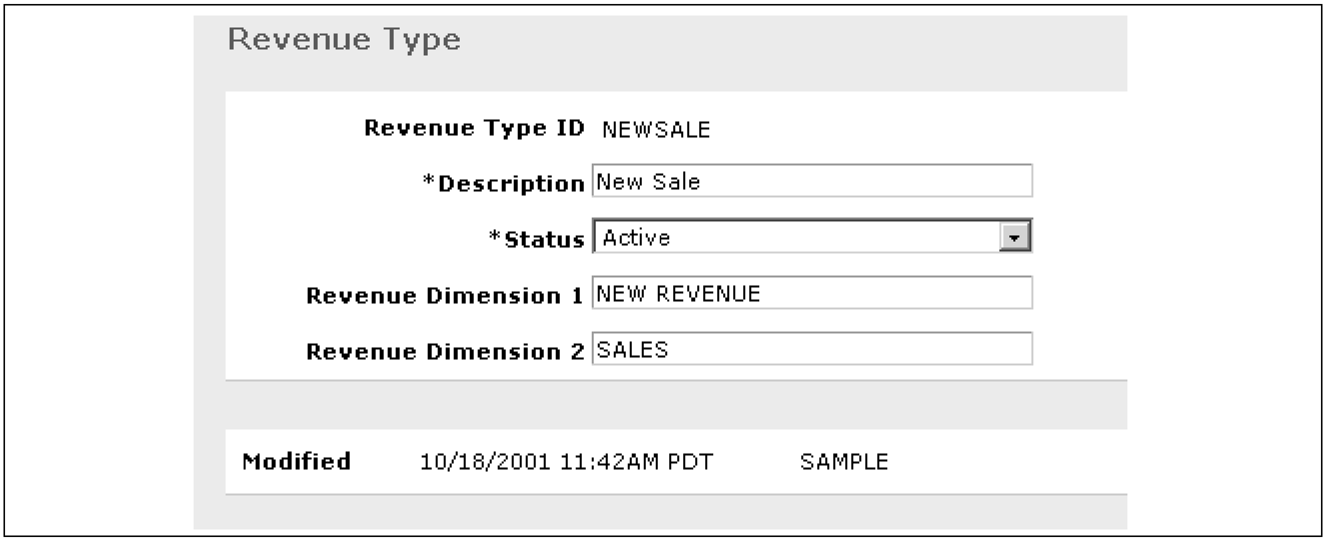
Forecast Type page

Use forecast types to categorize opportunity forecast revenue activity according to the business needs. For example, you might define forecast types of *Adjusted, Confirmed, Committed,* and *Open.* Forecast types are not predefined; typically, they are quite different for different kinds of business.

Available on Opportunity	Select to make the forecast type available from the opportunity pages, where you define or update an opportunity. When this check box is cleared, the forecast type is available only from forecast pages, where, typically, it is used to categorize types of adjustment activity.

Defining Revenue Types

Access the Revenue Type page.



Revenue Type page

Revenue Dimension 1 and **Revenue Dimension 2**

Revenue dimensions provide a mechanism for consolidating revenue types to forecast revenue analysis. When you have many revenue types, you can group them by using revenue dimensions.

For example, one dimension might be the type of revenue (new, upsell, or repeat) and the other dimension might be the type of product or service (license, warranty, or maintenance).

- If the revenue type ID is *New License*, you might have dimensions of *New Revenue* and *License*.
- If the revenue type ID is *Warranty Add On*, you might have the dimensions of *Upsell* and *Warranty.*
- If the revenue type is *Renew License*, you might have the dimensions of *Repeat Revenue* and *License*.

When reviewing forecasts, you can generate subtotals for revenue types and revenue dimensions.

PART 2

Working with Territories

CHAPTER 6

Configuring Assignment Criteria

This chapter provides an overview of assignment groups and discusses how to configure lead, opportunity, and account assignment criteria.

Understanding Assignment Groups

An assignment group contains the criteria that the system uses to determine how to assign sales representatives to a lead or opportunity. After you create an assignment group, you can associate the assignment group with a territory tree. When a sales user adds a lead or opportunity and clicks the Assign Sales Rep button, the system uses the assignment group associated with the territory tree to determine how to select the sales representative and team. The system uses the following steps:

1. The system selects one or more appropriate territories by evaluating the lead or opportunity.

   This system bases this evaluation on user-defined criteria and weights entered for the assignment group. The criteria could be the customer, product, region or industry. The system uses these criteria and weights to generate a score for each territory.

2. If you specify manual selection on the assignment group, the system allows the user to choose a sales representative or team from a list, which only contains representatives or teams from the selected territories.
3. If you specify automatic selection on the assignment group, the system uses user-defined options for the assignment group to choose a sales representative or team from the selected territories.

This table illustrates the possible assignment configurations that you can enter for an assignment group:

Assignment Configurations					Business Unit Restriction? Yes	Business Unit Restriction? No
Single Territory	Single Rep		Automatic	Primary Rep		
				Round Robin - Time		
				Round Robin - Availability		
			Manual Selection			
	Whole Team		Automatic			
			Manual Selection			
Multiple Territories	Single Team	Single Rep	Automatic	Round Robin - Time		
				Round Robin - Availability		
			Manual Selection			
		Whole Team	Automatic	Round Robin - Time		
				Round Robin - Availability		
			Manual Selection			
	All Teams	Single Rep	Automatic	Primary Rep		
				Round Robin - Time		
				Round Robin - Availability		
			Manual Selection			
		Whole Team	Automatic			
			Manual Selection			

Lead and opportunity assignment configurations

The following examples show how the system assigns the sales representative if you use the following assignment group settings (see assignment group field definitions for more information):

- *Multiple Territories – 2:* Search the tree to find the territories to which the sales representative is assigned, and if the user is assigned to multiple territories, find the two top-weighted territories.
- *All Teams:* Within each territory, the system identifies all teams to which the user is assigned.
- *Single Rep:* From each territory team, the system lists only one representative.
- *Primary Rep:* The representative from each top-weighted territory is the primary representative.

  The system identifies only the first one in the list as the primary representative for the lead or opportunity team.
- *No Business Unit Restriction:* The system assigns the item to the primary representative, who, because there is no restriction, might or might not be in the same business unit as the current sales representative.

Example 1: Let's look at a single tree, where the system determines which territories in the tree are best suited to receive the assignment, based on the defined criteria and weights, and finds the most suitable single representative or whole team using the specified methods.

This table lists the data in the system and the criteria from which the system must select the most suitable territories for the assignment in this example:

Territory	Total Weight	Product	Weight	Region	Weight	Industry	Weight
Western	9	Freezers	5	West	4		
Eastern	5	Refrigerators	5				
Northern	3					Computers	3

Territory

- Single Territory: The system selects *Western,* because, with a total weight of *9,* it is the single highest weighted territory.
- Multiple Territories: By default, the system looks for the two best suited territories, but you can increase the number of territories for which to search.

  In the default case, the system selects the territories of *Western,* with a total weight of *9,* and *Eastern,* with a total weight of 5.

  Note. With multiple territories, you can search within a single team in each suitable territory or within all teams in each suitable territory.

In this single territory scenario, the system then uses the *Western* territory data, as listed in this table, to select the most suitable single representative or whole team within that territory:

Territory	Sales Representative	Last Assigned Date	Availability Count	Primary in Team?
Western	ABC	6/1/2002	10	Yes
Western	LMN	5/1/2002	2	No
Western	XYZ	4/1/2002	8	No

Based on the modes and options specified, the system finds:

Automatic Assignment

For each option in the automatic assignment mode, the system finds:

- Primary Rep: The system selects *ABC*, because this representative is designated as the primary team member.
- Round Robin, Time: The system selects *XYZ,* because, with a last assigned date of 4/1/2002, this representative has gone the longest without a new assignment.
- Round Robin, Availability: The system selects *LMN*, because, with only two leads, this representative has the highest availability.

Manual Assignment

The system finds the single territory of *Western* as well as its sales representatives — *ABC, LMN,* and *XYZ.*

Select the sales representatives to assign.

Example 2: Let's look at a tree where territories overlap. The system determines which territories in the territory tree are most suited based on common factors and the defined criteria and weights. It also finds the most suitable single representative or whole team using the specified methods.

This table lists the data in the system and the criteria from which the system must select the matrix territory most suitable for the assignment:

Territory	Total Weight	Product	Weight	Region	Weight	Industry	Weight
Osborne Western	9	Pianos	5	West	4		
Osborne Trucking	7	Pianos	5			Trucking	2
Trucking	2					Trucking	2

Territory

The system selects *Osborne Western* and *Osborne Trucking,* because these are the highest weighted territories with common factors. Together they form the matrix organization of *Osborne* and the matrix product of *Pianos.*

The system then uses the matrix territory data, which is listed in this table, to select the most suitable single representative or whole team within the territory:

Territory	Sales Representative	Last Assigned Date	Availability Count	Primary in Team?
Osborne Western	A	6/1/2002	2	Yes
Osborne Western	B	5/1/2002	1	No
Osborne Trucking	AA	5/1/2002	8	Yes
Osborne Trucking	BB	5/16/2002	6	No

The system must consider all teams in the multiple territories. Based on the specified modes and options, the system finds:

Return Search Results for

For the automatic assignment mode, the system returns results for each option:

- Single Rep: The system selects one candidate for each team.

  The system selects *A* and *AA,* because these are designated as the primary team members for each territory.

  - Primary Rep: The system selects *A* as the primary matrix team member, because this representative is the first in the list.

- Round Robin, Time: The system selects *B* and *AA*, because these representatives have gone the longest on their teams without a new assignment.
- Round Robin, Availability: The system selects *B* and *BB*, because these representatives have the least number of assignments on their teams and, therefore, have the highest availability.

• Whole Team: The system selects the whole team from each territory.

The system selects *A*, *B*, *AA*, and *BB*. It adds the whole team to the lead's sales team and selects *A*, the first representative in the list, as the primary sales representative for the sales team.

Manual Assignment The system finds the multiple territories of *Osborne Western* and *Osborne Trucking* as well as all members of each team — *A, B, AA*, and *BB*. Select the sales representatives to add to the sales team, and select the primary sales team representative. You can have only one primary.

Configuring Assignment Criteria

To configure assignment groups, use the Configure Assignment Groups component (RSF_ASSIGN_CONFIG).

This section discusses how to:

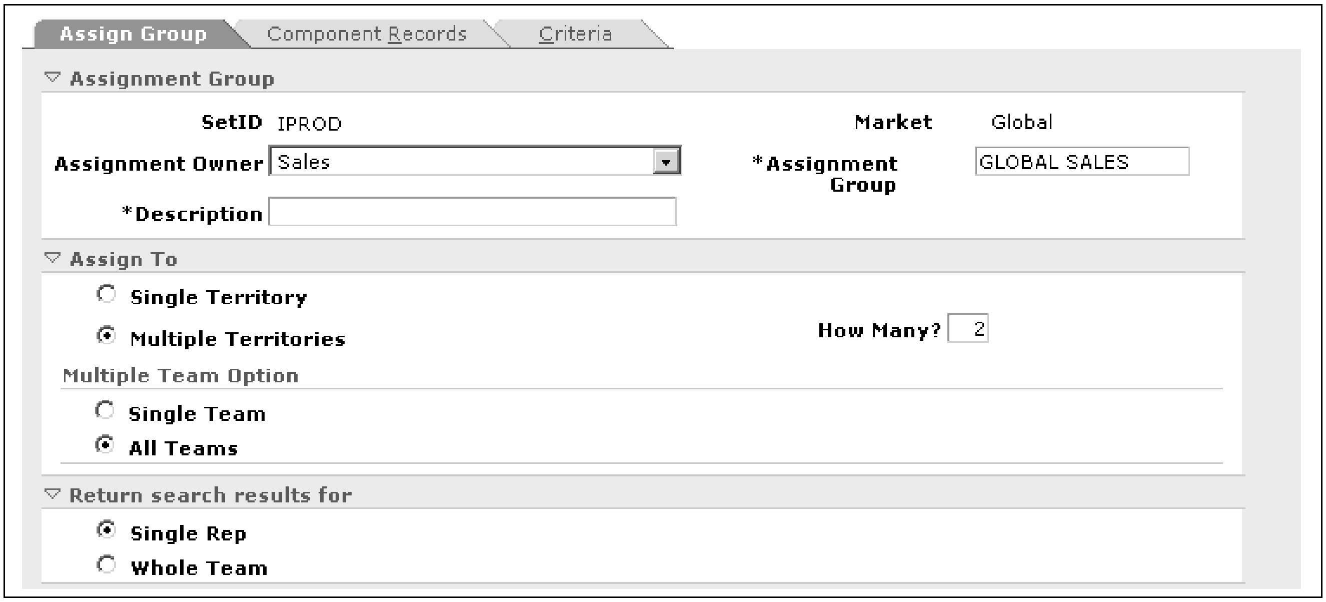
- Create assignment groups.
- Identify component records to use.
- Define criteria and their weights.

Pages Used to Configure Assignment Criteria

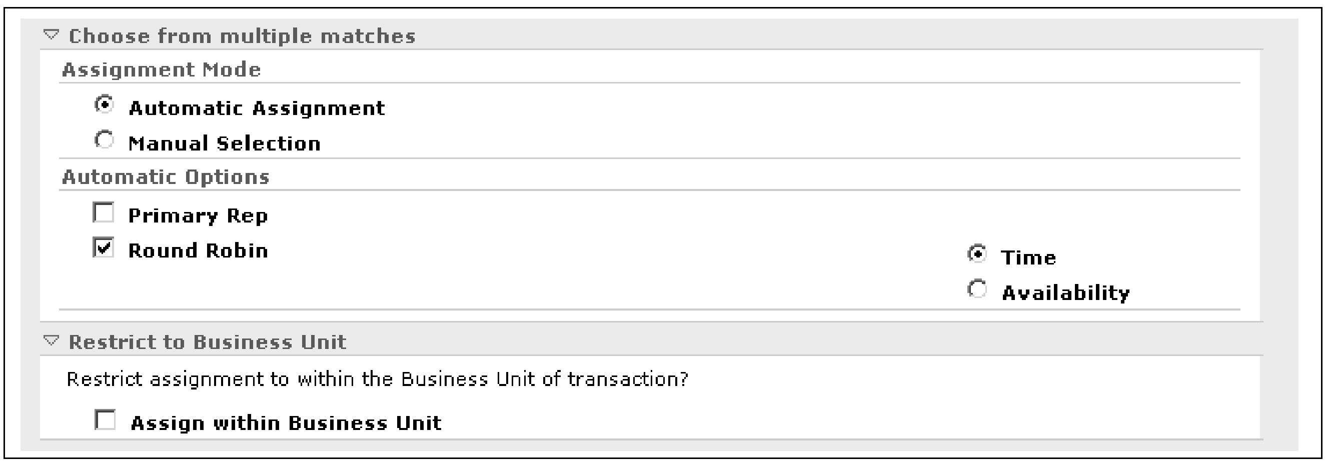
Page Name	Object Name	Navigation	Usage
Assign Group	RSF_ASSIGN_GROUP	Set Up CRM, Product Related, Sales, Territory, Configure Assignment Groups	Identify parameters for assigning leads or opportunities within a specified group.
Component Records	RSF_ASSIGN_RECS	From the Assign Group page, select the Component Records tab.	Identify components for defining a tree and its territories, and define records and fields for the round robin assignment method.
Criteria	RSF_ASSIGN_CRIT	From the Assign Group page, select the Criteria tab.	Identify weighted search and match criteria to find candidates for assignment.
Component	RSF_ASSIGN_COMP	From the Criteria page, click the Component link.	Determine which components use the specified field.

Creating Assignment Groups

Access the Assign Group page.



Assign Group page (1 of 2)



Assign Group page (2 of 2)

Assignment Group

Assignment Owner

Select an owner for the assignment group. Select *Sales* if you use the assignment group to assign sales representatives to leads and opportunities. Select *Account Management* if you use the assignment group to assign sales representatives to accounts.

If you select *Account Management,* the system sets the following defaults and makes the fields unavailable for editing:

- Assign To: Single Territory
- Return search results for: Entire Team

Assign To

Single Territory Select to have the system select sales representatives or teams in the single top-weighted territory.

Multiple Territories Select to have the system select sales representatives or teams in multiple top-weighted territories.

How Many? If you select Multiple Territories, enter the number of territories to search.

Single Team or **All Teams** If you select Multiple Territories, you can select Single Team to assign representatives only from within the single team that best fits the assign criteria, or select All Teams to assign representatives from within all teams that match the assign criteria.

If you select Multiple Territories, the system selects All Teams by default. You can override this.

Return search results for

Single Rep Select to assign to a single territory team member of the chosen territory.

Whole Team Select to assign to all territory team members of the chosen territory.

When you select Multiple Territories, the system selects Whole Team by default. You can override this.

Note. In PeopleSoft Sales, there are territory teams, sales teams, account teams, and lead or opportunity teams. The territory team, which is the team that you use here, is the group of individual sales users who are assigned to a territory.

Choose from multiple matches

Use the Assignment Mode group box to select the assignment mode.

Automatic Assignment Select to allow the system to assign leads or opportunities within the assignment group.

When selected, the Automatic Options group box becomes available.

Manual Selection Select to enable sales users to assign leads or opportunities manually within the assignment group.

When selected, search results are listed as candidates for assignment when the user clicks the Assign Sales User button on the Lead - Assign or Opportunity - Assign page.

Note. To enable sales users to assign sales representatives manually to leads or opportunities, you must select the Manual Selection check box, and select the Manually Reassign Leads, Manually Reassign Opportunities, and the assignment group Manual Selection check boxes on the Sales Access profile.

Use the Automatic Options group box to evaluate multiple matches automatically to narrow the selections to a single representative. This area is unavailable if you select any of these options:

- Manual Selection.
- Single Territory and Whole Team.

- Multiple Territories, All Teams, and Whole Team.

Primary Rep Select to have the system evaluate the territory team and select only the team member who is designated as the primary on the Territory page.

Round Robin and **Time** or **Availability** Select to have the system evaluate the territory teams to select candidates based on either time or availability parameters.

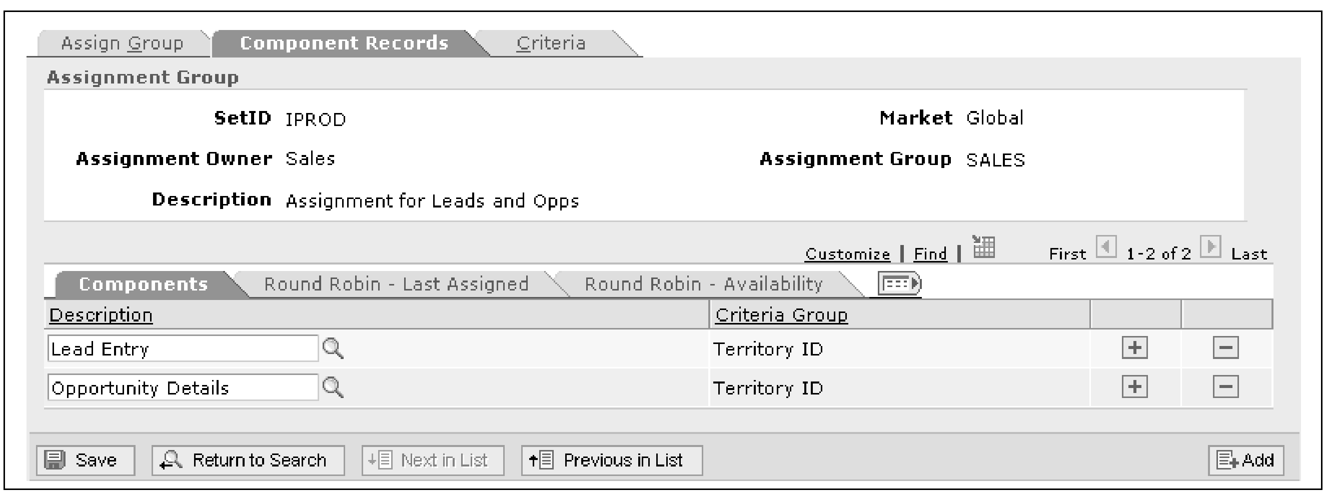
- Select Time to identify the sales representatives who have gone the longest without a recent assignment according to the record and field set on the Round Robin - Last Assigned tab on the Component Records page and the time stamp on the Territory Definitions page.
- Select Availability to identify, according to the record and field set on the Round Robin - Availability tab on the Component Records page, the representatives who have the least number of leads or opportunities assigned to them with the following status:
  - For Leads, the status of *New, Open, Accepted, Referred, Imported, Working, Converted to Opportunity, Rejected, Deferred* or *Turnback.*
  - For Opportunities, the status of *Open.*

Restrict to Business Unit

Assign within Business Unit Select to permit assignments only to sales representatives in the same business unit as the business unit to which the lead or opportunity belongs.

Identifying Component Records

Access the Component Records page.



Component Records page: Components tab

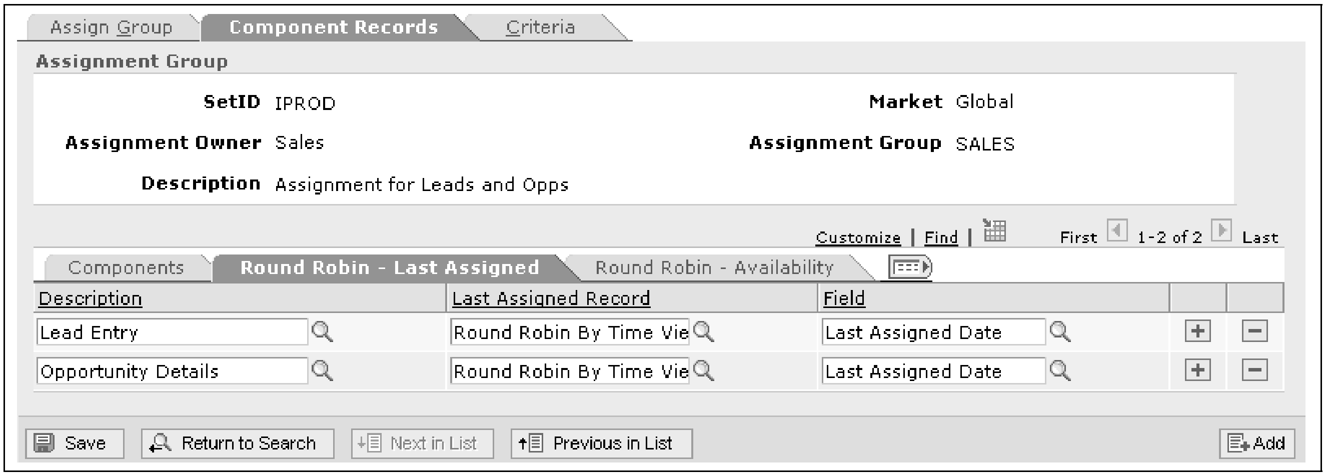
Components Tab

Select the Components tab.

Description Enter the components to use for the assignment group. The components that you enter appear on the Round Robin - Last Assigned and Round Robin - Availability tabs, and they populate the Components field on the Criteria page.

Round Robin - Last Assigned Tab

Select the Round Robin - Last Assigned tab.



Component Records page: Round Robin - Last Assigned tab

Last Assigned Record and **Field**

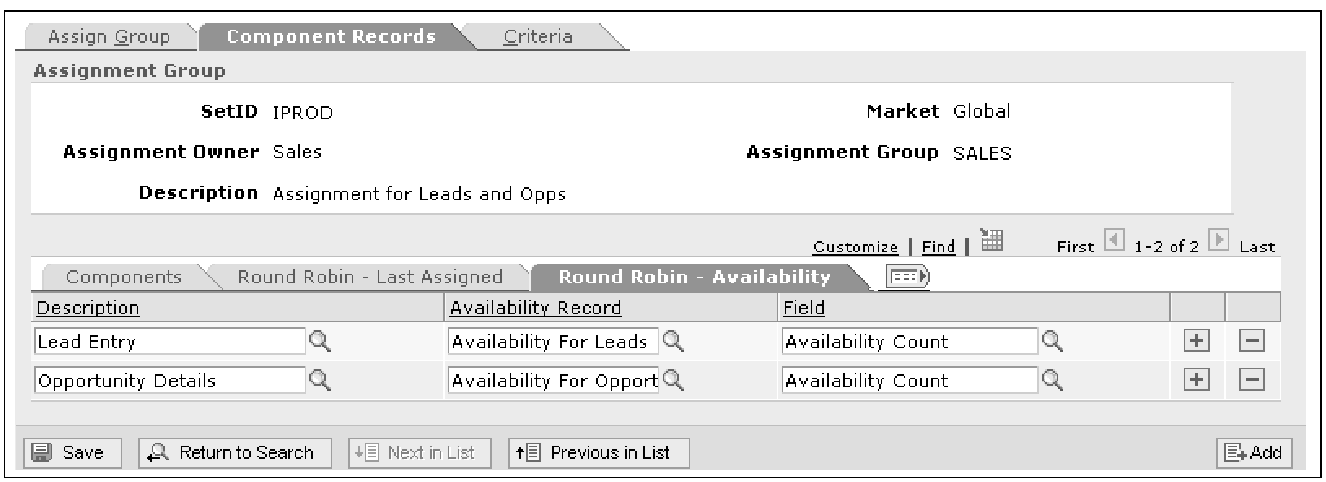
Enter the record and field to read on the specified component to determine which representative has gone the longest without a recent assignment.

The *Last Assigned Date* on the Lead Entry and Opportunity Details components is used in the Round Robin - Time assignment method. The time stamp on the Territory Definitions page is initially set to *01/02/1000* and updated each time that an individual who is a sales user is assigned to the territory and each time that a lead or opportunity is assigned to that individual.

See Chapter 7, “Creating Territory Trees,” Creating or Editing Territories, page 89.

Round Robin - Availability Tab

Select the Round Robin - Availability tab.



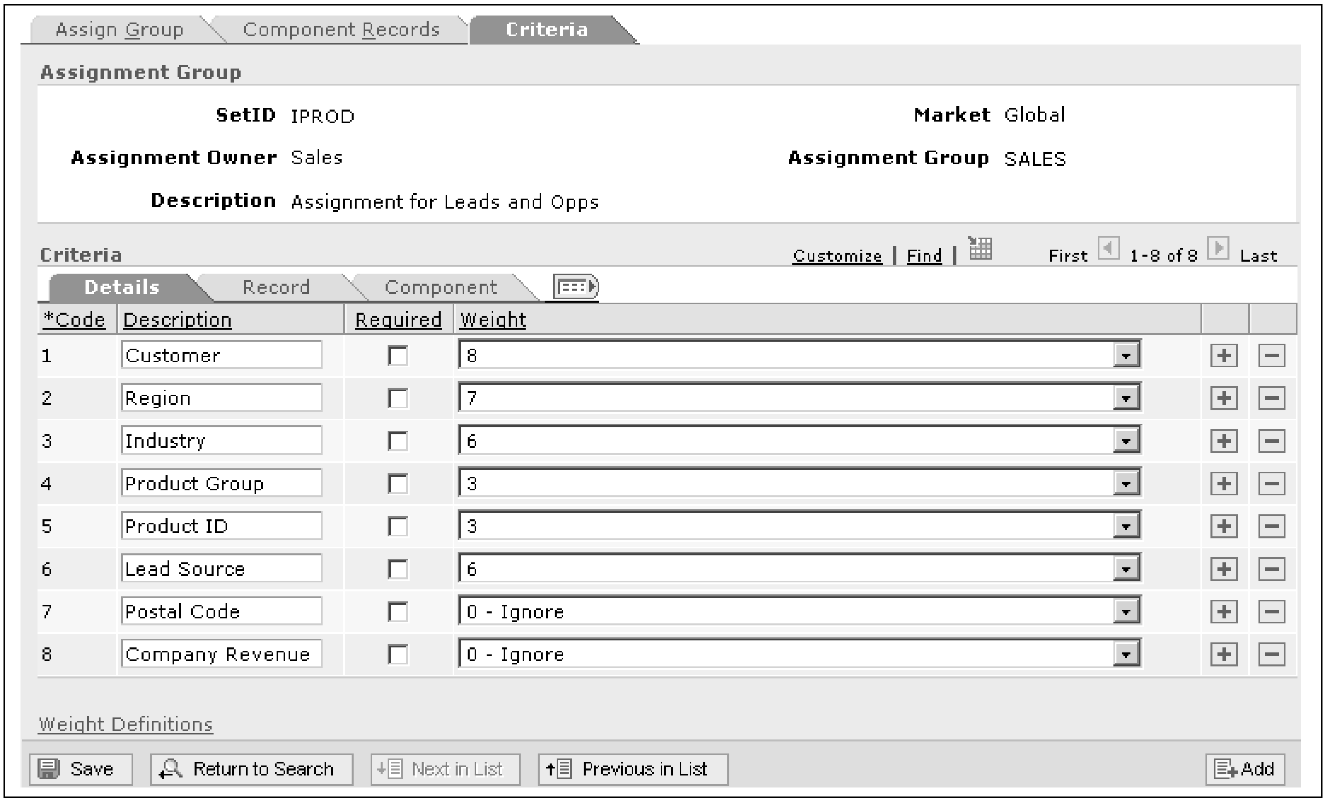
Component Records page: Round Robin - Availability tab

Availability Record and **Field**

The system internally counts the available leads and opportunities. Enter the record and field for the system to read (from the specified component) to determine which representatives have the least number of leads or opportunities assigned to them.

Defining Criteria and Their Weights

Access the Criteria page.



Criteria page: Details tab

Weight Definitions

Click to access the Assignment Weights page to determine or define weights to choose from for assignment criteria or to add new weights to the assignment group.

See Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up Assignment Weights, page 36.

Details Tab

Code and **Description**

Enter a code and a description for criteria to use for the assignment group.

Required

Select to identify data that must exist to allow an assignment.

For example, if you indicate that a product ID is required, but no product ID is captured prior to clicking the Assign Sales User button on the Lead - Assign or Opportunity - Assign page, the system displays an error message saying that the required criteria product ID is missing and that you must enter required criteria to make the assignment.

Required data must have an assigned weight. The default assigned weight is *0 - Ignore.* You can and probably will want to override this, especially for all required data.

Warning! You must identify required data and assign weights for all required data.

Weight

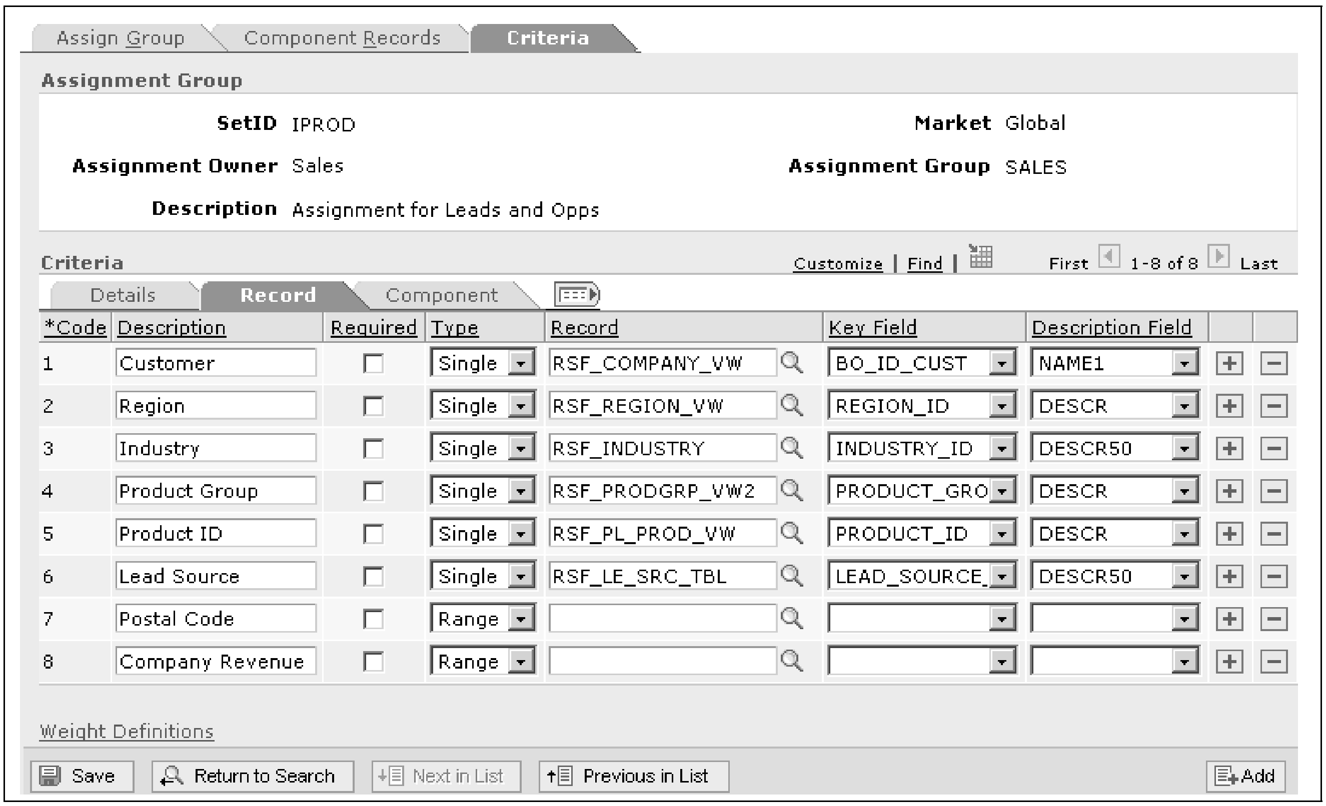
The degree to which criteria should be considered in finding a match.

Some weights lists have anchors, or low, middle, and high values, with other values in between. For example, the weights that PeopleSoft delivers predefined for the SHARE setID (as shown in the example) are in increments of one (0, 1, 2, 3, 4, 5, 6, 7, 8, 9) but have anchors of *0 = Ignore, 1 = Least Important, 5 = Important*, and *9 = Most Important.*

Click the Weight Definitions link to determine weight definitions.

Record Tab

Select the Record tab.



Criteria page: Record tab

Type

Controls whether a single value or a range of values is permitted for a match.

For example, suppose that you want to search for only those representatives who work with the same customer as the logged in sales user or specified sales representative, select the customer type of *Single.* If you want the system to search for representatives within a range of postal codes, select the postal code type of *Range.*

Specify the beginning and end of a criteria range on the Territory Definitions page.

Note. Currently, the system does not process dates as a criteria range.

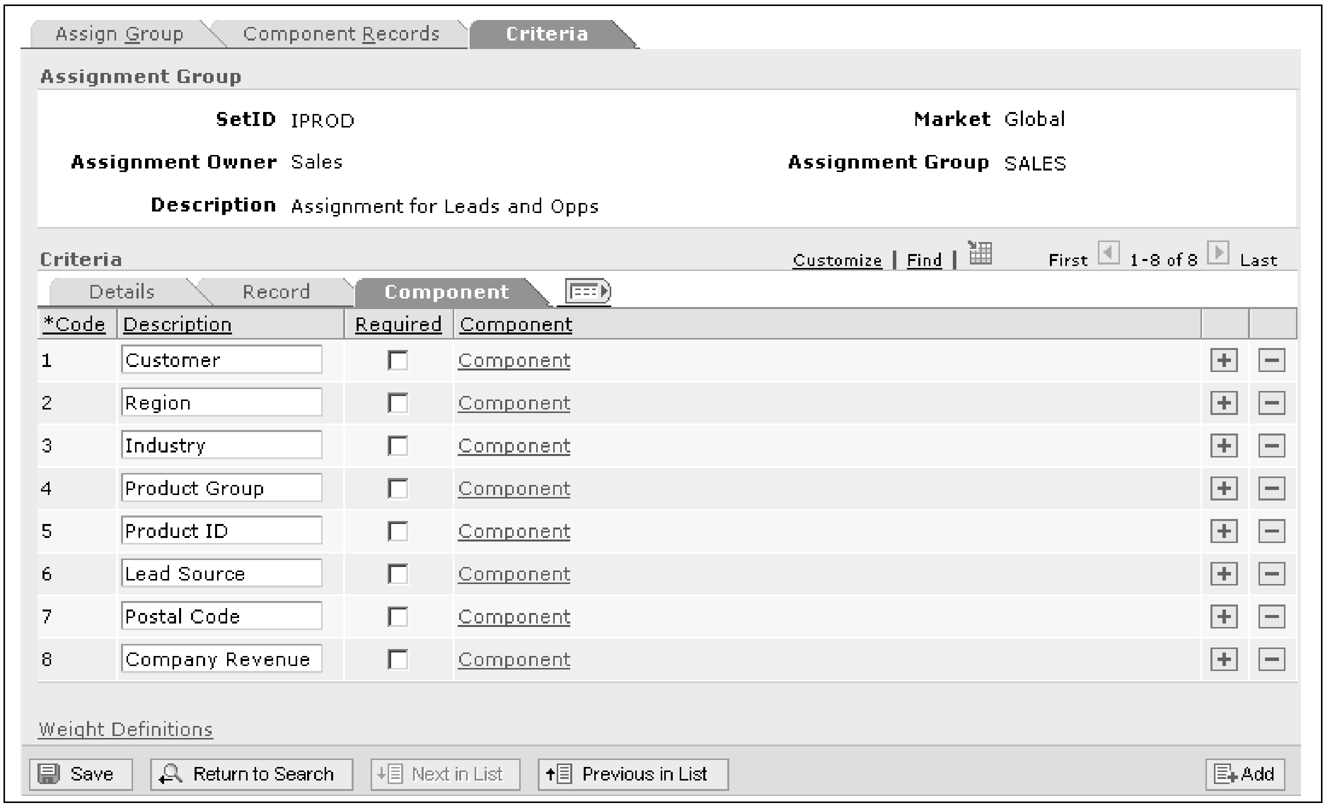
See Chapter 7, "Creating Territory Trees," Creating Territory Trees, page 86.

Record and **Key Field**

Enter the specific record and select the field to use to prompt for the criteria data to make available for an assignment group.

Component Tab

Select the Component tab.



Criteria page: Component tab

Component

Click to access the Component page to determine which components use the criteria field and from where, in the component buffer, each criteria field comes.

CHAPTER 7

Creating Territory Trees

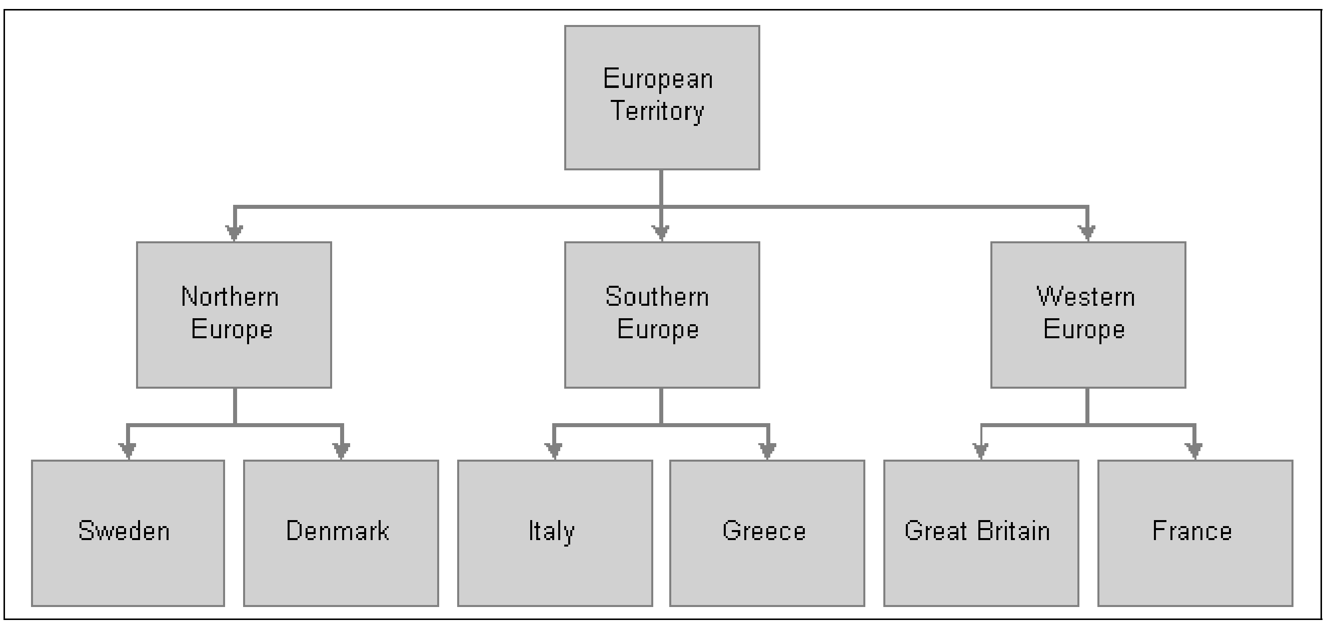
This chapter provides an overview of territory trees and discusses how to:

- Create territory trees.
- Run the sales access update process.

Understanding Territory Trees

A territory tree is a model of your sales structure. The structure of your territory tree depends on how you structure your sales activities. A company may segment its sales activities by product lines, geographic regions, customer accounts, industries, partners, or other criteria. A territory in a territory tree represents a segment of your sales activities. Many companies segment their sales geographically. For example, a company might divide a state into a northern region and a southern region, and define a territory for each region. However, a territory does not have to represent a geographic region. If you structure sales activities by industry, you could have three territories in your tree representing the manufacturing, insurance and transportation industries. If you have licensed PeopleSoft Strategic Account Planning, you can have territories represent different company accounts.

Territory trees are hierarchical and can contain multiple levels. The diagram below is an example of a territory tree for an European sales organization:



Territory tree for an European sales organization

PeopleSoft Sales utilizes territory trees to:

- Assign leads and opportunities to sales representatives.
- Determine an user's ability to view leads, opportunities, and forecasts.
- Roll up sales forecasts.

Before the system can use a territory tree to assign leads and opportunities to sales representatives, you must assign at least one sales representative to each territory. You can assign multiple sales representatives to a territory, and then have the system choose a representative for each lead or opportunity.

In addition, you must define specific values for assignment criteria on each territory. For example, if you want the system to assign leads and opportunities to the France territory based on the geographic region, you must specify *Region* as a Criteria Code and *France* as the Criteria Value.

See Chapter 6, "Configuring Assignment Criteria," Understanding Assignment Groups, page 73.

In order to provide a manager with visibility to sales data for a particular territory, you must associate the manager with the territory. When you associate a manager with a territory, the manager can view leads, opportunities, and forecasts for that territory and the subterritories below that territory. In the example above, if a manager is associated with the Western Europe territory, then the manager can view sales data for Western Europe and the territories below Western Europe—Great Britain and France.

Note. A sales user (such as a manager) must have the proper sales access profile to view other users' data.

Note. Before you can create criteria to define a tree, you must set up setIDs and business units and map them to the PeopleSoft Sales RSF06 tableset record.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Working with Business Units and TableSet Controls"

Creating Territory Trees

To create territory trees, use the Create Territory Tree component (RSF_TR_NEW_TREE).

To manage territory trees, use the Manage Territories component (RSF_TR_MANAGER).

This section discusses how to:

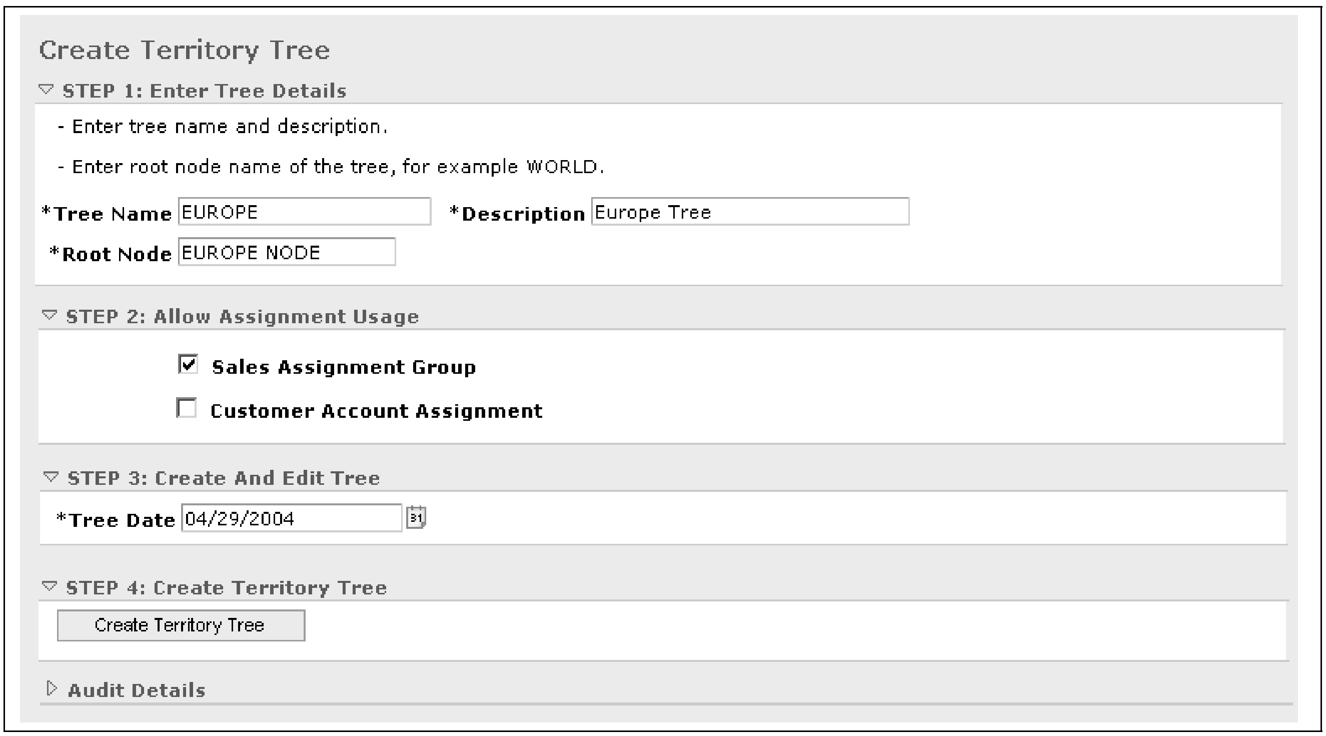
- Create trees.
- Define trees.
- Create or edit territories.

Pages Used to Create Territory Trees

Page Name	Object Name	Navigation	Usage
Create Territory Tree	RSF_TR_NEW_TREE	Set Up CRM, Product Related, Sales, Territory, Create Territory Tree	Create territory trees.
Tree Manager (PeopleTools)	PSTREEMGR	• From the Create Territory Tree page, click the Create Territory Tree button. • Sales, Manage Territories	Define the hierarchical structure of territory trees.
Territory Definitions	RSF_TERRITORY	Click the Edit Data button on the Tree Manager page.	Define and update territories.

Creating Trees

Access the Create Territory Tree page.



Create Territory Tree page

STEP 1: Enter Tree Details

Enter a tree name, description, and root node (the topmost territory level of the tree).

Tree names and effective dates are vital to creating multiple trees. You can create two trees with the same name and the same root node; but only if they have different effective dates. You can also have two trees with different names but with the same root node.

For example, you may create one tree with the name of your organization and another tree with the name of a subsidiary of your company. The root node for both trees might be World, since that is the broadest possible territory that each covers. However, if a tree with the same name and same root node already exists with that effective date, the system displays an error message.

STEP 2: Allow Assignment Usage

Sales Assignment Group Select this check box to enable the system to use the territory tree to assign sales representatives.

Customer Account Assignment Select this check box to enable the system to use the territory tree to assign account team members.

STEP 3: Create And Edit Tree

Effective Date Enter the date when the tree becomes effective. You can have several trees of the same name but with different effective dates.

If you set an effective date in the future, run the Update Sales Access process on or after that date to change territory visibility settings.

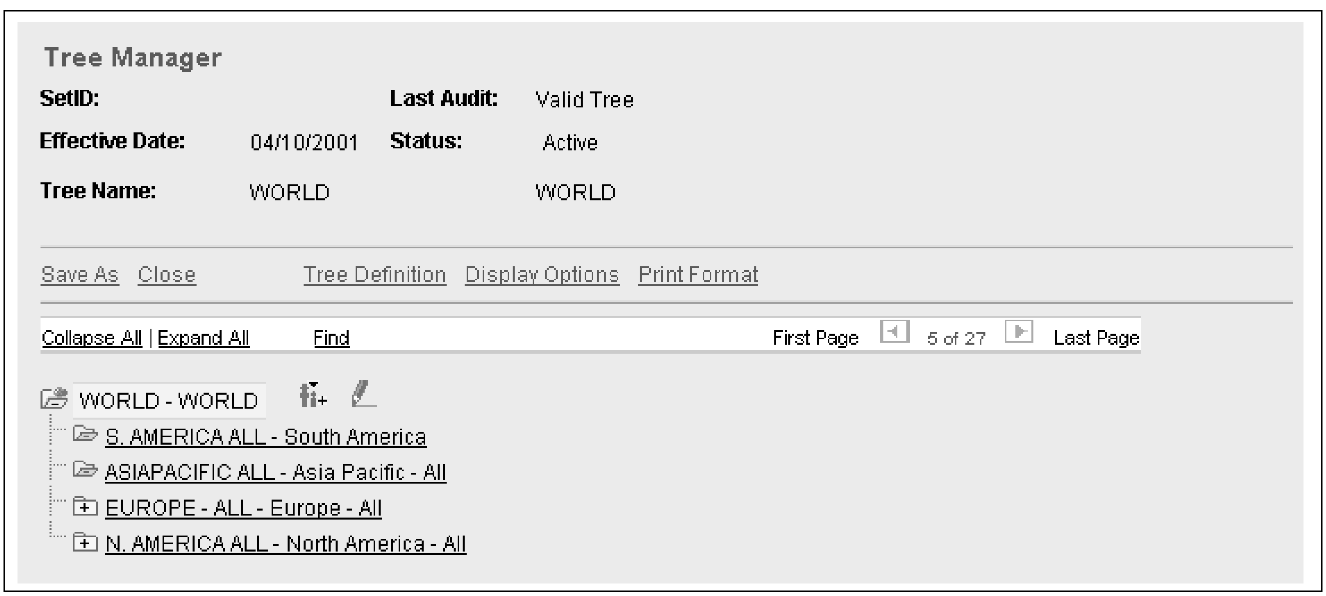
STEP 4: Create Territory Tree

Create Territory Tree Click to access the (PeopleTools) Tree Manager page to create nodes to add territories to the tree.

In PeopleSoft Sales, when you create a node in Tree Manager and click the pencil point button to edit the node, the system takes you to the Territory Definitions page.

Defining Trees

Access the (PeopleTools) Tree Manager page.



Tree Manager page

Use the PeopleTools Tree Manager page to add nodes and define territories.

Note. After you make changes to a tree, you should run the Sales Access Update process to apply the changes. The Sales Access Update process updates the access that sales users have in a territory tree and the structure for rolling up forecasts. However, it does not reassign leads or opportunities; use the reorganization or reassignment features of PeopleSoft Sales for that.

See Also

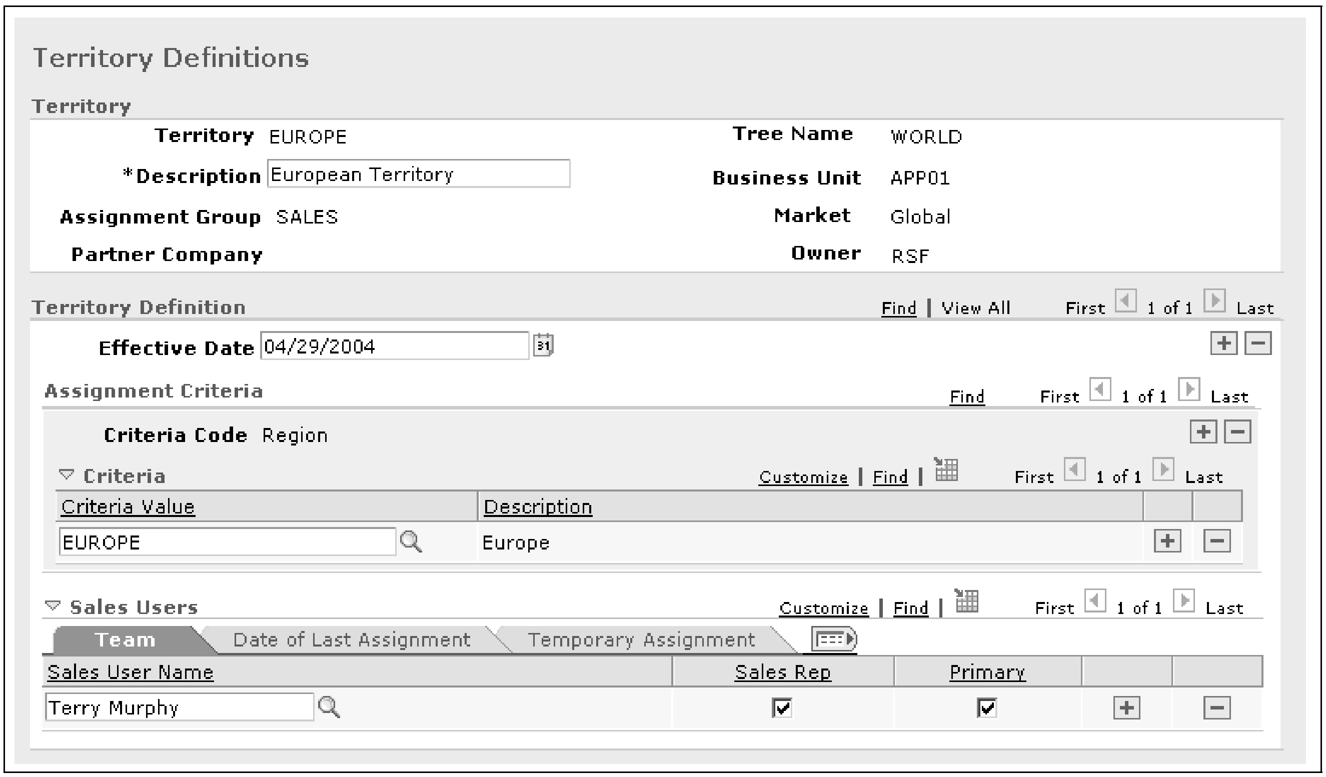
Chapter 8, "Reorganizing or Deleting a Territory Tree," page 93

Chapter 12, "Assigning a Lead or Opportunity," Reassigning a Sales Representative's Leads, Opportunities, and Accounts, page 154

Creating or Editing Territories

To create or edit territories, use the Territory (RSF_TERRITORY) component.

Access the Territory Definitions page.



Territory Definitions page

Specify assignment criteria to define which leads or opportunities can be assigned to the territory.

Business Unit, Assignment Group and **Market**	The system displays the business unit, assignment group, and market defined in the User Preferences component for the sales user who created the territory. If the system does not find an assignment group and market for the user, it displays the assignment group and market that are associated with the business unit on the Sales Business Unit Definition page.
Criteria Code	Select the assignment group's criteria (set on the Criteria page) to define which values should be assigned to this territory.

For example, if the assignment group criteria includes *Customer, Product ID,* and *Lead Source,* you may specify that only *Customer* and *Lead Source* from the lead or opportunity should be used to match to this territory.

Criteria Value

Enter values to use for the specified criteria.

For example, if you select the criteria code of *Customer,* you may specify that all leads from the customers *Johnson Brothers, Inc., ABC Corporation,* and *Acme Imports* should be assigned to this territory.

If the criteria value permits a range, the From Criteria Value and To Criteria Value fields appear.

From Criteria Value and **To Criteria Value**

Specify the beginning and end of the range of values to accept for the criteria value.

For example, suppose that you select a criteria code of *Product ID,* you might specify a criteria value of *0001,* but you also want to accept products with IDs between 0001 and 0099. In this case, enter a from criteria value of *0001* and a to criteria value of *0099.*

Sales User Name

Select a sales user to assign to the territory.

Sales Rep (sales representative)

Select to have the system consider the sales user for assignment to a lead or opportunity if you have the system automatically assign sales representatives. When a sales user is added to the territory team, the system automatically selects *Sales Rep.* If you don't want the system to assign leads and opportunities to the sales user, clear this check box.

Note. If you add sales managers or sales administrators to a territory tree to give them visibility to sales representatives' leads and opportunities in the tree, you typically do not select the *Sales Rep* check box. To give an user visibility of other's leads and opportunities, you must assign the data distribution rules *View Leads as Manager* and *View Opportunities as Manager* to the user. You can set up data distribution rules on the Dataset Rules and Dataset Roles pages in the Enterprise Components menu.

See *Enterprise Components for CRM PeopleBook*

Primary

Select to identify a sales user as the primary sales representative for the territory. You can have only one primary for each territory. The system relies on this check box when the assignment method is set to assign items only to the primary representative.

Note. There are two concepts of *primary* in PeopleSoft Sales. One is the primary representative for the lead or opportunity team. The other, used here, is the primary representative for the territory team.

Assigned TimeStamp

When you click Apply to apply the territory to the tree, the system displays the date and time:

- With the *Sales Rep* check box selected for a sales user, the system displays the generic time of *01/01/1900* with the time of *12:00:00 AM.*

This indicates that the sales user has been successfully added to the territory but has not been assigned a lead or opportunity. When the sales representative is assigned a lead or opportunity, the system updates the date and time with the date and time when the assignment takes place using the round robin, time assignment method.

- With the *Sales Rep* check box not checked for a sales user, the system displays no date or time.

  This should be the case for sales users who are administrators, managers, executives, or similar positions that are not eligible for lead or opportunity assignments but who require visibility to sales data.

Temporary Assignment

If the primary sales user is temporarily unavailable due to vacation or some other reason, you can assign another sales user for a specific time period. For the sales user who is unavailable, enter the following information:

Date From Enter the beginning date for the temporary assignment.

Date To Enter the ending date for the temporary assignment.

Assigned To Select the sales user who is temporarily assigned to the territory during the time period.

Running the Sales Access Update Process

To run the Sales Access Update process, use the Sales Access Update component (RSF_ACCESS_RUN).

When you make changes that impact a tree, territory nodes, or a sales user's visibility of a tree, you must apply the changes and update security by running the Sales Access Update process.

This section discusses how to run the Sales Access Update process.

Page Used to Run the Sales Access Update Process

Page Name	Object Name	Navigation	Usage
Sales Access Update	RSF_ACCESS_RUN	Set Up CRM, Product Related, Sales, Security and Personalization, Sales Access Update	Run the sales access update process to apply changes to a tree.

Run the Sales Access Update Process

Access the Sales Access Update page. Select the tree that you want to update.

Sales Access Update page

CHAPTER 8

Reorganizing or Deleting a Territory Tree

This chapter provides an overview of tree reorganization and discusses how to:

- Reorganize a territory tree.
- Delete trees or tree nodes.

Understanding Tree Reorganization

Occasionally, you may need to change the structure of a territory tree due to a reorganization or expansion of your sales activities. For example, you might add or delete territories, or restructure a part of the territory tree. Use the tree reorganization process to make changes to a tree. Typically, you use the reorganization process to clone an existing tree and then make modifications to the new tree. You can give the new tree the same name as the existing tree, as long as you assign it a new effective date. Another option is to give the new tree an entirely different name. You can then view and edit the new tree as needed. The system uses the tree with the most recent effective date as your default tree.

Territory Tree Reorganization is performed using the process template provided in the Reorganize Territories component. Each step of the process is keyed to the completion of the previous step. Typically, system administrators run the tree reorganization process. Users with branch access to a territory can run the tree reorganization process for the territory. You can give system administrators access to specific branches within a tree.

Note. Branch access is distinct from territory visibility. A PeopleSoft user does not need branch access to access territories within a branch; the user needs only territory visibility.

When you reorganize territory trees, the system helps you to reassign the sales users for leads and opportunities. The reorganization process suggests a new territory and a new primary sales user for each lead or opportunity in a territory that you have changed or deleted. When you clone a tree and make changes, you can generate a worksheet based on these changes, so that you can see how the system would reassign the leads and opportunities. You can then choose to override or adjust the changes, select which changes to accept, and then submit them to update the leads and opportunities.

Besides the mass reassignment that is integral to reorganizing a tree, at any time you can individually reassign a representative's leads and opportunities to a different sales representative. For example, suppose that the current representative is promoted or otherwise moved out of the sales representative position, the representative's leads and opportunities must be reassigned.

See Chapter 12, "Assigning a Lead or Opportunity," Reassigning a Sales Representative's Leads, Opportunities, and Accounts, page 154.

Note. The RSF_TR_REORG component includes the Configurable Search capability, which enables you to filter the reorganization worksheets into more logical groupings.

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

The worksheets use predefined configurable assignment criteria to suggest the best fit for lead or opportunity reassignment. You may have reasons for not accepting the systems suggestions, and at this stage, you can make those changes. The reorganization worksheets have been tuned for faster performance and display a specific number of leads or opportunities.

The Configurable Search setup for the reorganization component limits you to a maximum of 300 leads or opportunities per search. The system displays a message if more than 300 are found. You may need to change this depending on the number of leads or opportunities that your sales force is working at the time of reorganization. The system takes longer to present larger result sets.

You may also need to filter the search criteria to narrow down what appears on each worksheet. The delivered Configurable Search for Territory Tree Reorganization includes the ability to filter searches based on Reorganization ID, Current Rep, Current Territory, New Rep, New Territory, and Lead or Opportunity fields. Filtering your search based on one or more of these presents you with a more focused set of leads and opportunities to review.

The Current Rep and Current Territory prompts are based on the Current Tree. The Current Rep prompt is a list of direct reports in the tree hierarchy reporting to the manager or administrator responsible for processing reorganization, while New Rep and New Territory prompts are based on the New Tree. The New Rep prompt enables the administrator or manager to assign leads and opportunities to representatives who may or may not be direct reports of that manager in the sales organization.

It is important to note that the ability to use Personalize Search is activated by default, and among other benefits, it enables the user to save searches and reuse them. The Personalize Search feature also controls whether you use the reorganization ID as one of your search criteria for the reorganization that you are currently reviewing. Since you may test many possible structures while planning your reorganization, the system stores them under unique IDs. If you prevent the inclusion of the reorganization ID in your search or saved search, your resulting data sets may include information from any or all of the reorganization structures stored in the system. The reorganization ID should always be one of the selected criteria on the Personalize Search page.

Another feature of Configurable Search is the ability to provide visual prompts about your search result set. At the top of the page, you see the criteria on which the result set is based. For example, you might see: *Reorganization ID = 100000000300010 AND Current Rep = Marx, Stu Manager AND New Rep = Allen, Edward.* This example shows that the data result set was filtered first by reorganization ID then any lead assigned to the current representative, in this case Stu Marx, and the new representative who is Edward Allen. If one or more member of the data set needs to be assigned to a representative besides Edward Allen, you can do so at this time.

Reorganizing a Territory Tree

This section discusses how to:

- Clone and reorganize a tree.
- Review the reorganization worksheets.
- Select the territory team and primary representatives.
- Submit the reorganization.

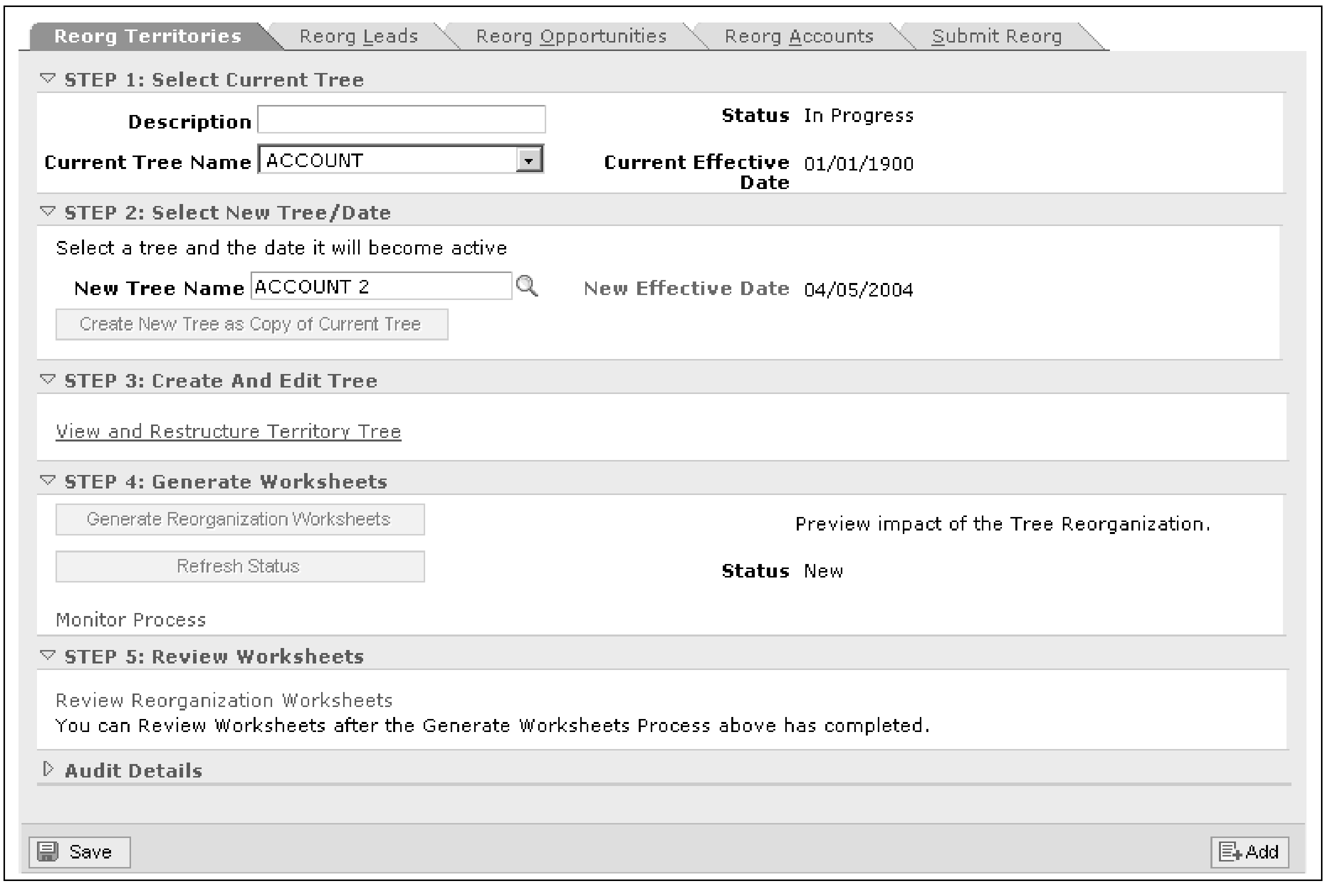
Pages Used to Reorganize a Territory Tree

Page Name	Object Name	Navigation	Usage
Tree Reorganization	RSF_TR_REORG	Sales, Reorganize Territories	Follow steps to reorganize territories on a tree.
Tree Manager	PSTREEMGR	Sales, Reorganize Territories Click the View and Restructure Territory Tree link.	View or make changes to a territory tree.
Lead Reorganization	RSF_TR_REORG_LEAD	Sales, Reorganize Territories, Reorg Leads	Review and adjust the system's reassignment of leads in the new structure.
Lead Reorganization - Current Team	RSF_TR_LE_TEAM	Sales, Reorganize Territories, Reorg Leads Click the Current Team link.	Review the current team of a lead before reorganization.
Lead Reorganization - New Team	RSF_TR_REORG_LETM	Sales, Reorganize Territories, Reorg Leads Click the New Team link.	Review and adjust the new territory team of a lead after reorganization, and select the primary representatives.
Opportunity Reorganization	RSF_TR_REORG_OPP	Sales, Reorganize Territories, Reorg Opportunities	Review and adjust the system's reassignment of opportunities in the new structure.
Opportunity Reorganization - Current Team	RSF_TR_OP_TEAM	Sales, Reorganize Territories, Reorg Opportunities Click the Current Team link.	Review the current team of an opportunity before reorganization.
Opportunity Reorganization - New Team	RSF_TR_REORG_OPTM	Sales, Reorganize Territories, Reorg Opportunities Click the New Team link.	Review and adjust the new territory team of an opportunity after reorganization, and select the primary representatives.
Account Reorganization	RSF_TR_REORG_ACCT	Sales, Reorganize Territories, Reorg Accounts	Review and adjust the system's reassignment of accounts in the new structure.
Account Reorganization - Current Team	RSF_TR_ACC_TEAM	Sales, Reorganize Territories, Reorg Accounts Click the Current Team link.	Review the current team of an account before reorganization.
Account Reorganization - New Team	RSF_TR_REORG_ACTM	Sales, Reorganize Territories, Reorg Accounts Click the New Team link.	Review and adjust the new territory team of an opportunity after reorganization, and select the primary representatives.
Submit Reorg	RSF_TR_SUBMIT	Sales, Reorganize Territories, Submit Reorg	Follow steps to submit a reorganization of a territory tree.

Page Name	Object Name	Navigation	Usage
Sales User	RSF_SUSER1	Sales, Reorganize Territories, Click the Look Up Sales User link.	View or adjust each sales user's territory accessibility after reorganizing a tree.
Sales Access Update	RSF_ACCESS_RUN	Sales, Territories, Reorganize Territory Trees Click the Update Security Access link.	Run the Update Sales Access process to update security.

Cloning and Reorganizing a Tree

Access the Reorg Territories page.



Reorg Territories page

Follow steps to reorganize territories on a tree.

Note. The links and buttons on this page become available dynamically as you complete the steps.

STEP 1: Select Current Tree

Current Tree Name Select the tree that you want to clone.

If the sales user is assigned to a single tree, the system displays the name of that tree and makes the field unavailable.

If the sales user is assigned to multiple trees, the tree name is available and the trees to which he or she is assigned are available, so that the sales user can select a tree.

Note. Sales users can clone or reorganize only trees to which they are assigned. Sales users can also reorganize only the leads and opportunities of the sales representatives to which they have visibility on the territory tree.

For example, a sales administrator for the European tree could reorganize only the Europe tree and only sees the European leads and opportunities on the reorganization worksheets.

See Chapter 3, “Setting Up Sales Security and Personalization,” Defining a Sales User’s Visibility, page 19.

STEP 2: Select New Tree/Date

New Tree Name

Enter or select the name that you want to give the tree that you are creating.

If you have access to multiple trees, you can select from those tree names or enter a new tree name.

New Effective Date

Enter the date on which the new tree should become effective. The system enters the current date as the effective date, which you can override.

You might enter a future effective date to give you time to reorganize the tree, review the worksheets, and adjust the leads and opportunity assignments for sales representatives to which you have visibility on the new tree.

Create New Tree as Copy of Current Tree

Click to clone the tree specified in the Current Tree Name field in the STEP 1: Select Current Tree group box and give it the name specified in the New Tree Name field.

The system copies the tree and makes the View and Restructure Territory Tree link available in the STEP 3: Create and Edit Tree group box.

STEP 3: Create and Edit Tree

View and Restructure Territory Tree

Click to access the (PeopleTools) Tree Manager page, where you can create new nodes, delete nodes, and otherwise make changes to the cloned tree.

Note. If you delete nodes, be sure to clean up the residual territory data.

See Chapter 8, “Reorganizing or Deleting a Territory Tree,” Deleting Residual Territory Definitions From PeopleSoft Sales, page 102.

STEP 4: Generate Worksheets

The next step is to run the Tree Reorganization process (RSF_TR_REORG).

Note. Before generating the worksheets, you must specify assignment groups for all accounts that are affected by the reorganization.

Generate Reorganization Worksheets

This button is available only after you complete the previous step.

Click to reassign all of your leads and opportunities for the specified new tree and territory definitions, based on the assignment criteria configuration.

Worksheets enable you to view how the system reassigned the leads and opportunities based on the criteria. Worksheets also enable you to adjust the assignments, if necessary.

Refresh Status

Click to refresh the status display.

Monitor Process

Click to access the Process List page, where you can identify the status of the reorganization worksheet generation process to determine when it is completed.

When it is completed, the next step is available.

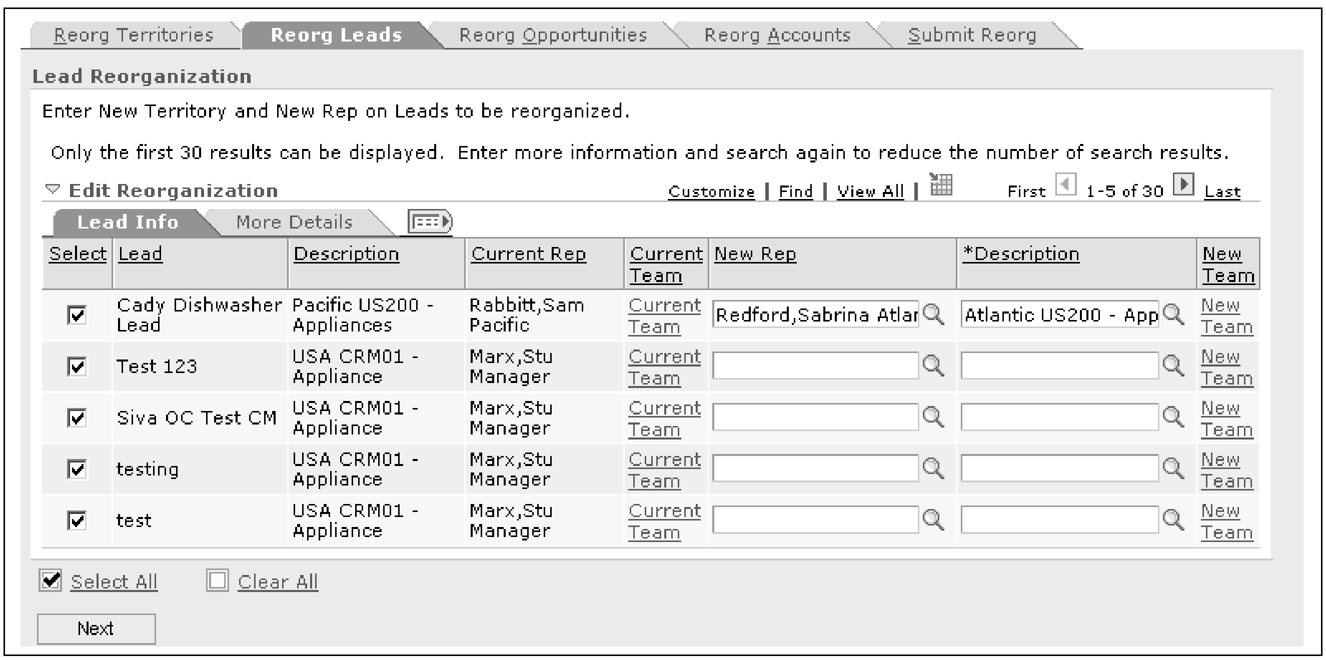
STEP 5: Review Worksheets

Review Reorganization Worksheets

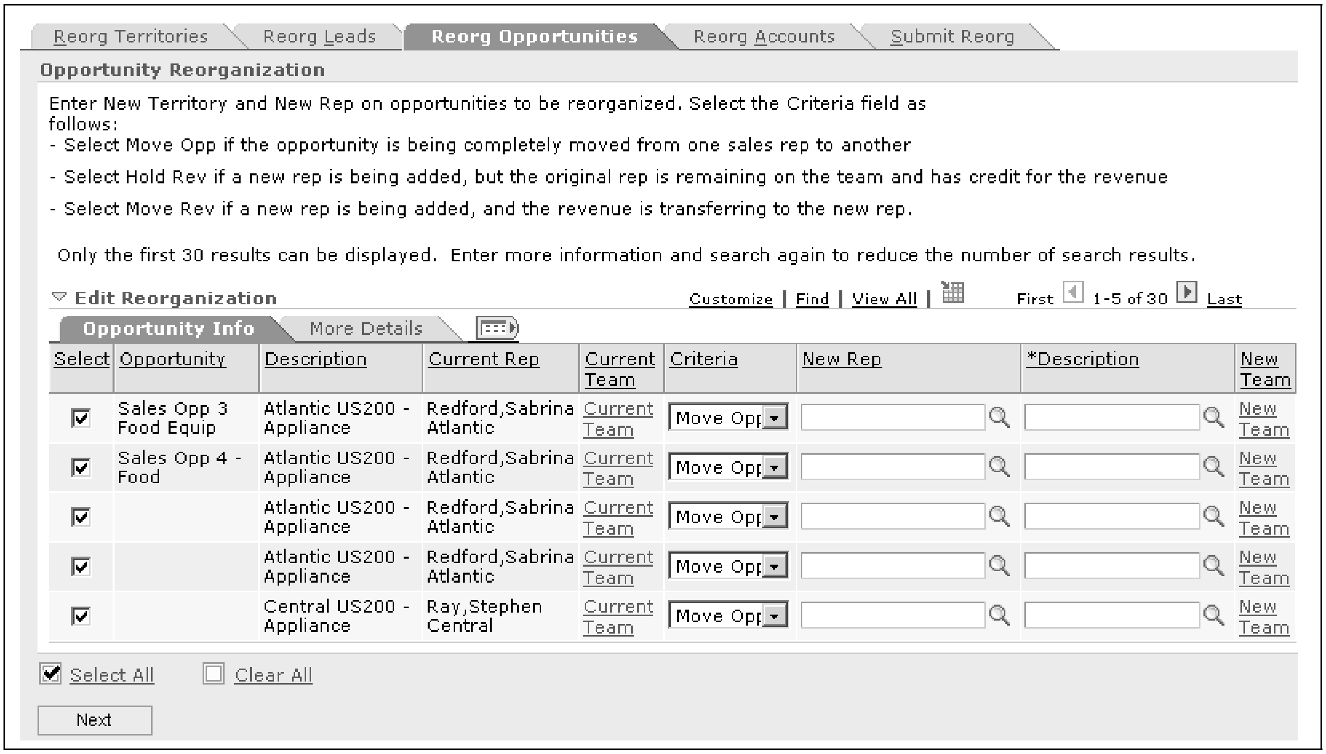
Click to access the leads, opportunities, or accounts reorganization worksheets that were generated using the STEP 4: Generate Worksheets group box.

Reviewing the Reorganization Worksheets

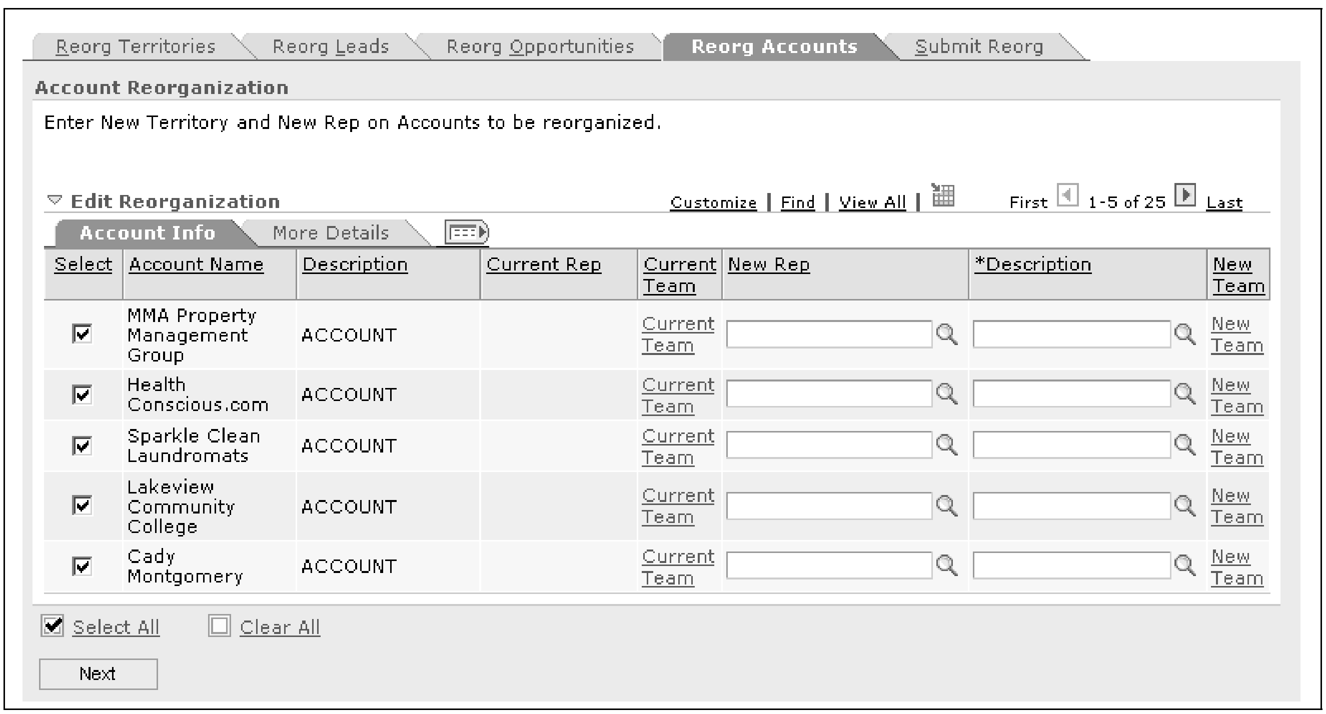
Access the Leads Reorganization page, Opportunities Reorganization page, or Accounts Reorganization page.



Lead Reorganization page



Opportunity Reorganization page



Account Reorganization page

Review the results of the system's reassignment of leads, opportunities or accounts in the new tree structure. Select new representatives to assign the items, if necessary.

Select	Select each reassignment that you want to accept.

Current Team

Click to access the Lead Reorganization - Current Team, Opportunity Reorganization - Current Team, or Account Reorganization - Current Team page, where you can view the current team for the lead, opportunity or account prior to reorganization. This can be helpful for determining the required changes.

New Team

Click to access the Lead Reorganization - New Team, Opportunity Reorganization - New Team, or Account Reorganization - New Team page, where you can view the new team for the lead, opportunity or account after reorganization. This can be helpful for identifying the sales representatives to add to the sales team. You can also use these pages to select the primary representative.

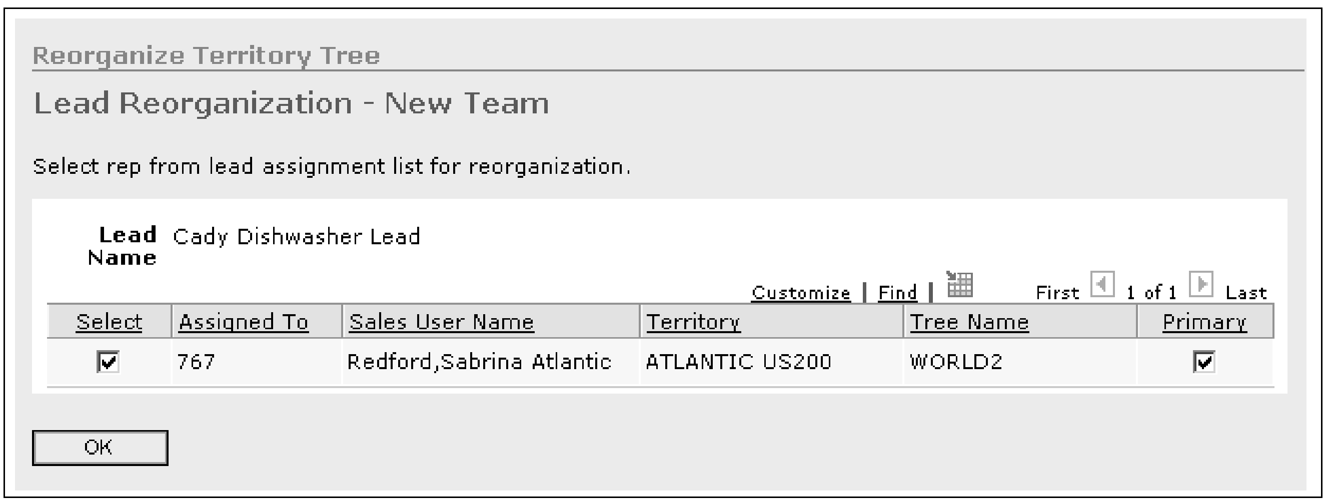
Click OK; the system updates the new primary representative from this page to the leads, opportunities, or accounts.

Next

Click to access the Submit Reorg page, where you can click Submit Reorganization to complete the reassignments.

Selecting the Territory Team and Primary Representatives

Access the Lead Reorganization - New Team page, Opportunity Reorganization - New Team page, or Account Reorganization - New Team page.



Lead Reorganization - New Team page

Select

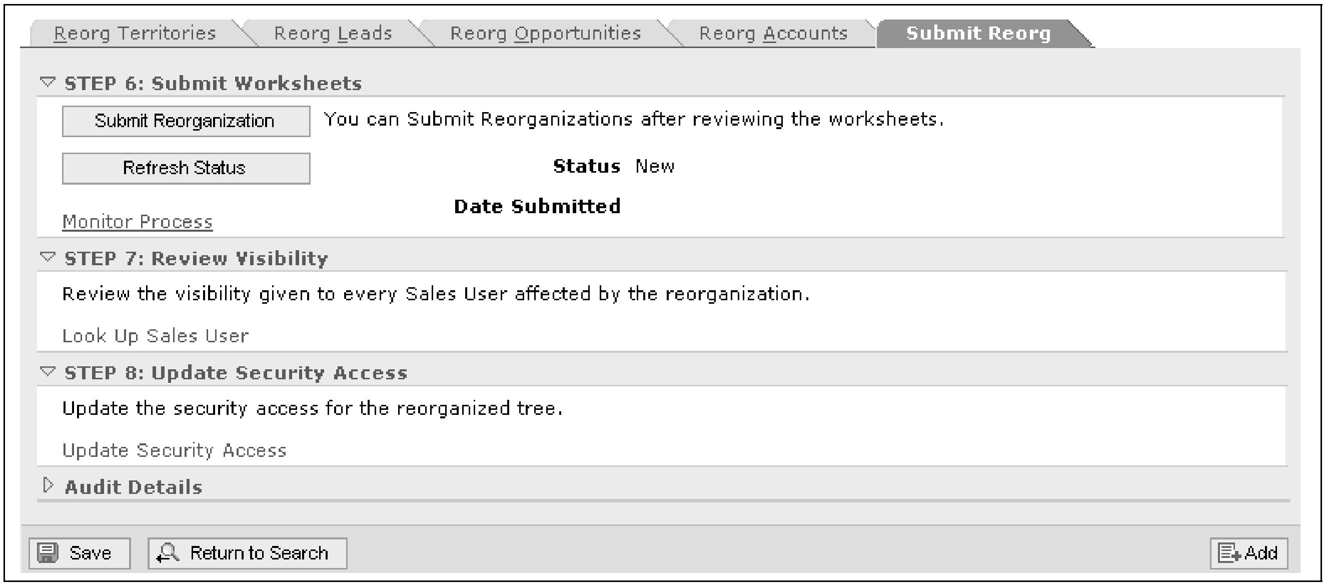
Select a check box for each member that you want to keep on the new team after the reorganization.

Primary

Select to specify the primary sales representative for each territory.

Submitting the Reorganization

Access the Submit Reorg page.



Submit Reorg page

STEP 6: Submit Worksheets

Submit Reorganization	Click to apply the reorganizations from the worksheet to the leads, opportunities and accounts by updating the new territory and sales representatives.

STEP 7: Review Visibility

Look Up Sales User	Click to access the Sales User page for each sales user affected by the reorganization to view or adjust the user's territory visibility settings.

STEP 8: Update Security Access

Update Security Access	Click to access the Sales Access Update page, where you can run the process to apply the changes and update the security settings.

Deleting Trees or Tree Nodes

This section discusses how to:

- Use PeopleSoft Tree Manager to delete tree items.
- Delete residual territory definitions from PeopleSoft Sales.

Note. Deleting a whole tree should be done with great caution. The only time you might want to delete a whole tree is when you have been practicing setting up a tree and want to delete the drafts.

Pages Used to Delete Trees or Tree Nodes

Page Name	Object Name	Navigation	Usage
Tree Maintenance	PSTREEMAINT	Tree Manager, Tree Utilities, Copy/Delete Tree, Tree Maintenance	Delete a tree.
Tree Structure Maintenance	PSTREESTRCMAINT	Tree Manager, Tree Utilities, Copy/Delete Tree, Tree Structure Maintenance	Delete tree nodes.
Delete Territory	RSF_TR_DEL_TREE	Set Up CRM, Product Related, Sales, Territory, Delete Territory	Delete residual tree and territory data from the application after deleting trees or nodes in PeopleSoft Tree Manager.

Using PeopleSoft Tree Manager to Delete Tree Items

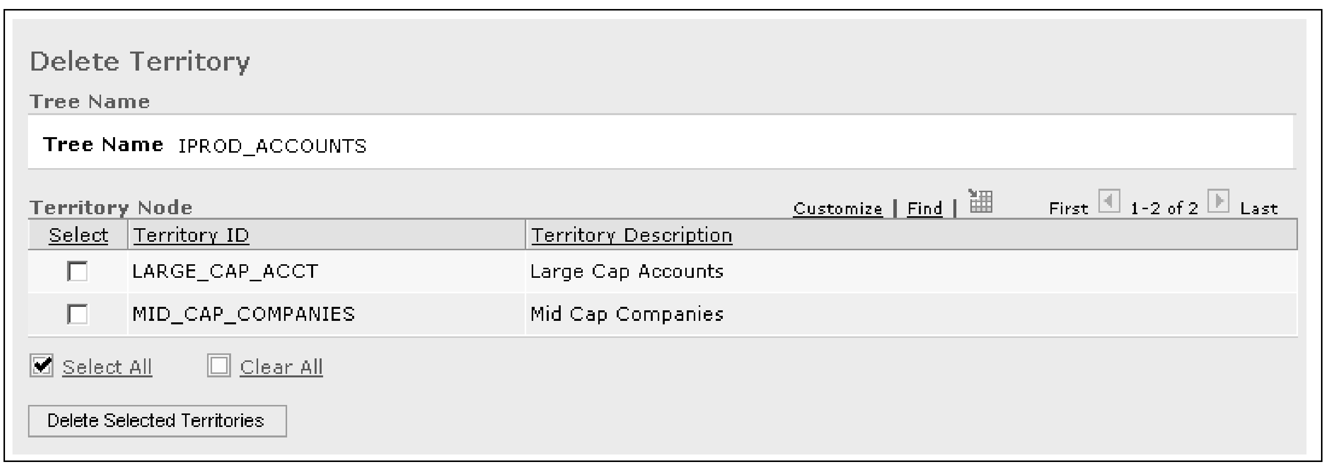
Access the Tree Maintenance and Tree Structure Maintenance pages in PeopleSoft Tree Manager.

See *PeopleSoft Tree Manager PeopleBook*

Using PeopleSoft Tree Manager, you can delete nodes from a tree or delete a whole tree. PeopleSoft Tree Manager, however, does not delete the territory data associated with trees or nodes across applications. This residual territory data still exists in PeopleSoft Sales and can be included in prompt lists as if actively assigned to a tree. For example, you might delete the node for the Western territory, but the Western territory and its data still exists. You must delete this residual territory data from PeopleSoft Sales using the Delete Territory page.

Deleting Residual Territory Definitions From PeopleSoft Sales

Access the Delete Territory page.



Delete Territory page

All territories that were deleted on a tree in PeopleTools are listed on this page. Deleted territories are no longer used for visibility or assignment. Use this page to delete residual territory data from PeopleSoft Sales.

Select Select the territory tree or node for which you want to delete residual data.

Delete Selected Territories When you click this button, the system asks you to confirm your decision to delete the residual data for the selected items. When you proceed, the system deletes the selected items and returns you to this page, listing only the data, if any, that still exists for the tree.

PART 3

Managing Sales Leads and Opportunities

Chapter 17
Sending Sales Emails and Correspondence

Chapter 18
Viewing the Opportunity Pipeline

Chapter 19
Including Opportunities in Forecasts and Closing Opportunities

CHAPTER 9

Understanding Sales Leads and Opportunities

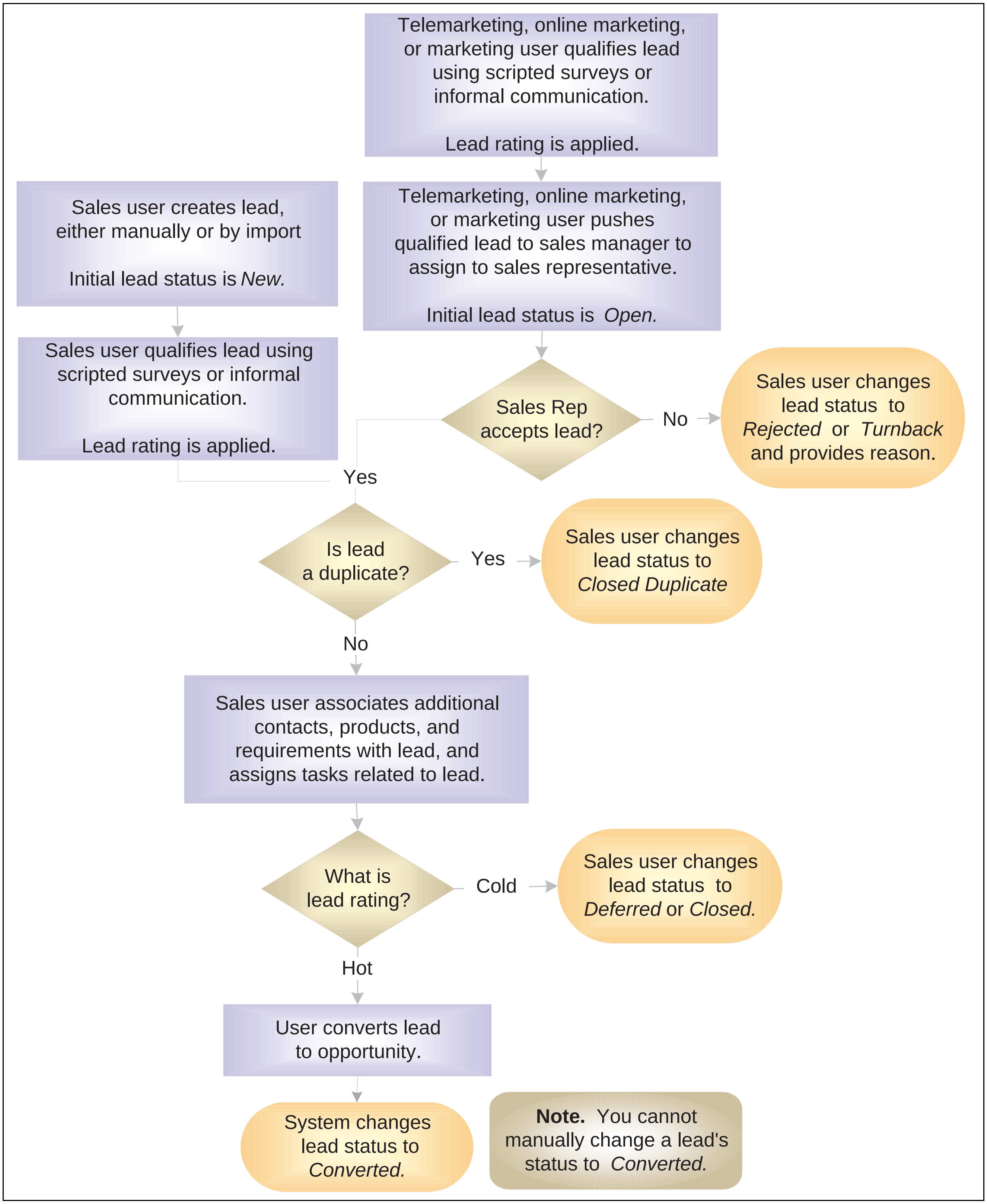
This chapter provides an overview of sales leads and opportunities, and discusses:

- Differences between leads and opportunities.
- Workflow for leads and opportunities.
- History tracking for leads and opportunities.

Understanding Leads and Opportunities

The key to a successful sales cycle is efficiently managing leads and opportunities toward the closing of a sale. You may start by bringing leads into the system, qualifying them, and then converting them to opportunities. Then, assign potential revenue figures and expected close dates to the opportunities, and review the opportunities within pipelines and forecasts to estimate individual and company revenue.

Some companies have fast transaction cycles with no distinction between a lead and an opportunity. Other companies have longer sales cycles, where tracking opportunity information becomes critical. Whether the company uses leads only, opportunities only, or leads and opportunities, you want the sales representatives to enter and track all of the information. PeopleSoft Sales is a management tool that enables you to do that. It provides a flexible, configurable way for sales users to enter and track lead and opportunity data and for sales managers to view that data to manage sales progress and predict close sales ratios:



Managing leads to opportunities

With PeopleSoft Sales:

- Sales users can search for and organize leads and opportunities by nearly any criteria: sales representative, status, lead rating, and so on.

  They can look up company and contact information, identify competitors, associate partners, and include notes and attachments for each deal.
- Managers can identify sales teams and assign sales team members.
- Sales users can capture the supporting efforts that are involved in working any lead or opportunity by adding tasks and assigning them to the appropriate team members.
- Tasks that are added to a lead or opportunity appear automatically in the task list and calendar of the person to whom the task is assigned.
- Sales users can view all of their tasks from the My Tasks page or from the automated calendar.
- You can view task history for any lead or opportunity to quickly identify which tasks are in process, canceled, or completed.

Understanding Leads

A lead represents a potential customer for the sale of the company's products and services. In some sales organizations, especially those that sell products and services over the telephone as part of a call center operation, the lead may be used to track all elements of the sales transaction, from qualification to closure. In other sales organizations, a telemarketing organization may use the lead to track and qualify potential customers that may then be turned over to an inside sales or field sales organization as opportunities.

PeopleSoft Sales enables you to manage leads and track them from beginning through closures. When a lead is qualified, it may be converted into an opportunity for pursuit by one or more selling organizations. One individual can be a lead sales representative in multiple opportunities. An opportunity can also be associated with one or more leads.

The minimum requirements for creating a lead in PeopleSoft Sales include:

- A description of the lead
- A lead status
- The business unit

It is advisable to provide the customer name and at least one contact name and phone number for follow-up. Of course, you can enter as much additional information as you want.

You can enter leads into PeopleSoft Sales by:

- Creating a new lead and entering the data directly.
- Copying or cloning an existing lead, changing the necessary data, and saving it as a new lead.
- Importing data from an external comma-delimited spreadsheet, perhaps one that you receive from the telemarketing department or that you create from the latest trade show.

You can also receive leads into PeopleSoft Sales from the integration with PeopleSoft Marketing and Telemarketing. With a custom action, you can receive leads in real time from web forms with PeopleSoft Online Marketing.

See *PeopleSoft Enterprise CRM Marketing Applications PeopleBook*

When you have a lead, qualify it to determine how likely the customer is to make a purchase. With PeopleSoft Sales, you can use a branch script, or survey, to help do this. A survey is a set of prewritten questions with score levels to identify the customer's response. When you finish entering the customer's responses, the system tallies a total of the scores and rates the lead, for example, as hot, warm, or cold. The marketing or telemarketing department might administer the survey as part of a marketing campaign, or a sales representative can select a survey script to run.

In many organizations, the telemarketing organization is responsible for qualifying leads to a certain point. At that point, they can push the lead through the territory management and configurable assignment criteria system to assign it to the sales representative who can turn back, reject, or accept it.

Understanding Opportunities

You can add an opportunity directly to PeopleSoft Sales, or you can convert an existing lead to an opportunity.

If the organization does not use leads, you can add opportunities and manage and track them as you do leads, including qualifying and assigning them and developing the sales proposals. You cannot, of course, accept, reject, or turn back an opportunity; these actions are relevant to assignment of leads by telemarketing to sales.

If you do use leads, upon meeting the organization's requirements, you can convert the lead to an opportunity so that it can be included in pipelines and forecasts.

Note. Opportunities, not leads, are included in pipelines and forecasts.

As with opportunities, the minimum requirements for creating an opportunity include:

- A description of the opportunity
- An opportunity status
- The business unit

See Also

Chapter 4, "Setting Up Sales Leads and Opportunities," Understanding the KES Process, page 27

Understanding the Difference Between Leads and Opportunities

The most significant difference between leads and opportunities is their relation to pipelines and forecasts. The system can roll up opportunities into pipelines and forecasts, but it does not roll up leads. If you integrate PeopleSoft Enterprise Incentive Management with the system, you can include opportunities (but not leads) in the compensation calculations of Enterprise Incentive Management.

For the most part, the Lead component has the same pages (Summary, Discover, Assign, Qualify, Propose, Tasks, Notes and History) and the same sections as the Opportunity component. The following exceptions relate specifically to forecasting, which uses products, prices, and revenue allocations:

- On the Opportunity - Propose page, PeopleSoft Sales users can click the Create Forecast button to copy products to the Forecast section and make them available for inclusion in forecasts.
- On the Revenue Percentage tab on the Opportunity - Assign page, PeopleSoft Sales users with the appropriate sales access profile can specify revenue allocations and shadow allocations to identify the amounts of revenue that are assigned to individuals.

- Because the system does not roll up leads into forecasts, there is no Revenue Percentage tab on the Lead - Assign page, and no Forecast section on the Lead - Propose page.

The following list explains additional differences between leads and opportunities:

- You can create opportunities only in PeopleSoft Sales.

  However, you can create leads in other PeopleSoft products (for example, PeopleSoft Telemarketing, Marketing, or Support).
- You can accept, reject, or turn back a lead, but not an opportunity.
- You can track the stage of the sales process on the Opportunity - Discover page, but not on the Lead - Discover page.

Understanding Workflow for Leads and Opportunities

You can set up workflow to send notifications when certain events occur in the Lead and Opportunity components. For example, the system can send a workflow to a sales manager if a sales representative rejects a lead. PeopleSoft delivers several different policies that specify the details for a workflow:

Policy Name	Description
Lead is Rejected or Turnback	The system sends notification if a sales user rejects or turns back a lead.
Lead ESA Pricing Info Received	The system sends notification when it receives pricing information from the PeopleSoft Enterprise Service Automation application for a quote created from within a lead.
Lead not accepted in due time	The system sends notification when a lead is not accepted in due time, which is defined for the lead rating.
Opportunity ESA Pricing Info Received	The system sends notification when it receives pricing information from the PeopleSoft Enterprise Service Automation application for a quote created from within an opportunity.

Like other PeopleSoft Customer Relationship Management applications, PeopleSoft Sales uses the active analytics framework to configure workflow.

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

Understanding History Tracking for Leads and Opportunities

You can set up history tracking to maintain records of events that occur in the Lead and Opportunity components. For example, the system can log a record if a sales manager changes the sales representative assignment for a lead. PeopleSoft delivers several different policies that specify the details for history tracking:

Policy Name	Description
Lead Assigned To Changed	The system logs a history record if a sales user changes the sales representative assignment for a lead.
Lead Rating Changed	The system logs a history record if a sales user changes the rating for a lead.
Lead Status Changed	The system logs a history record if a sales user changes the status for a lead.
Opportunity Assigned To Changed	The system logs a history record if a sales user changes the sales representative assignment for an opportunity.
Opportunity Sales Stage Changed	The system logs a history record if a sales user changes the sales stage for an opportunity.
Opportunity Status Changed	The system logs a history record if a sales user changes the status for an opportunity.

The configuration process for history tracking is similar to that for workflow.

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

CHAPTER 10

Creating Sales Leads and Opportunities

This chapter discusses how to:

- Create a sales lead.
- Create a sales opportunity.
- Select the customer for a lead or opportunity.
- Select customer contacts for a lead or opportunity.
- Clone a sales lead or opportunity.
- Convert a lead to an opportunity.

Creating a Sales Lead

This section discusses how to create a sales lead.

Warning! If you use a Sybase database and your user's role has data distribution rules with 16 or more subqueries, you may get an error when you access a lead or opportunity. If you get an error, reduce the number of data distribution rules for your user's role, or reduce the complexity of the data distribution rules.

You can set up data distribution rules in Enterprise Components.

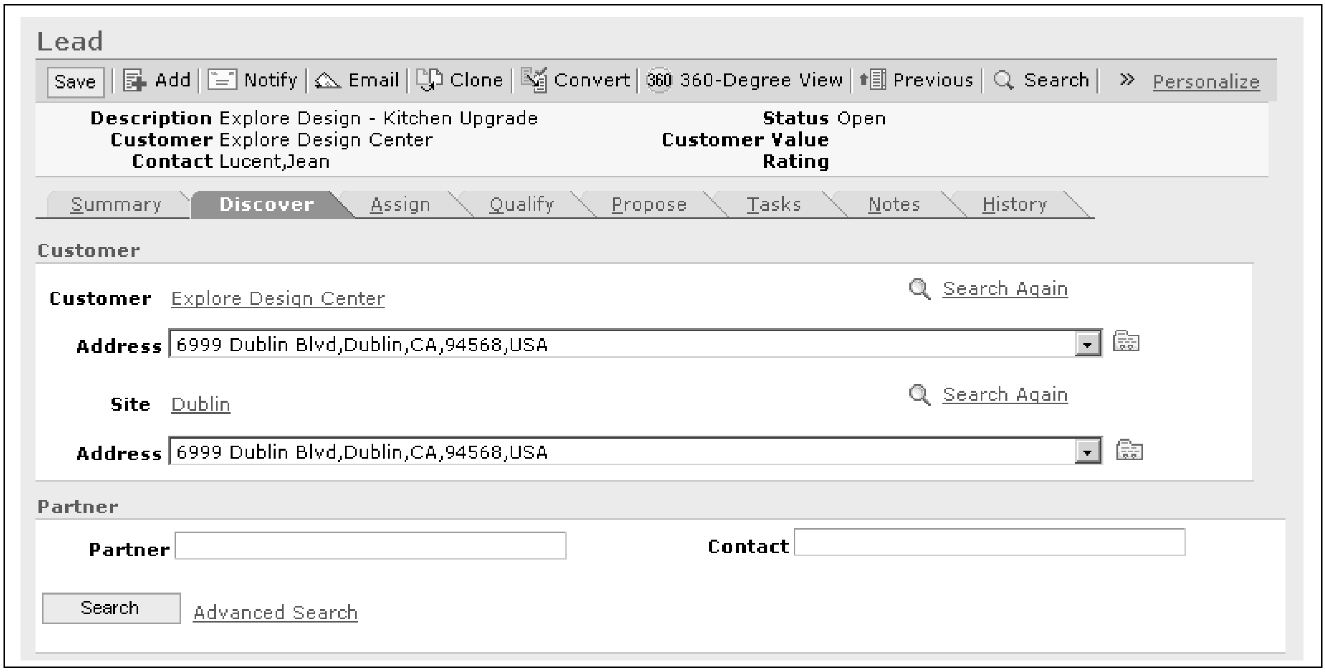
See *Enterprise Components for CRM PeopleBook*

Page Used to Create a Sales Lead

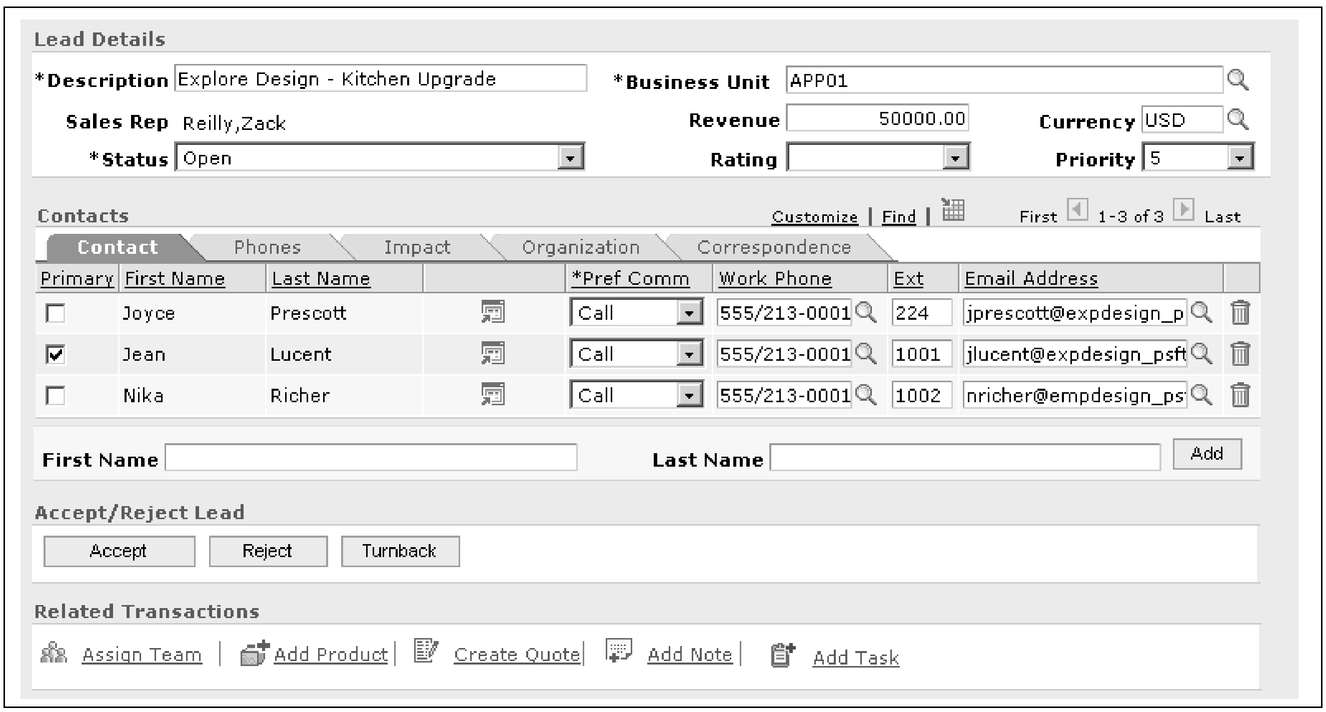
Page Name	Object Name	Navigation	Usage
Lead - Discover	RSF_LEAD_ENTRY	Sales, Add Lead	Enter details about a sales lead, including the name, status, and rating, and the customer's name, address, and contact people.

Creating a Sales Lead

Access the Lead - Discover page.



Lead - Discover page (1 of 2)



Lead - Discover page (2 of 2)

See Chapter 10, "Creating Sales Leads and Opportunities," Selecting the Customer for a Lead or Opportunity, page 120.

See Chapter 10, "Creating Sales Leads and Opportunities," Selecting Customer Contacts for a Lead or Opportunity, page 126.

Partner and **Contact** — Before clicking the Search button, you have the option to enter characters in the Partner or Contact fields. Click the Search button to access the

Search for Partner page, where you can view the results of the search and select a partner and contact for the lead.

If you already have selected a customer when you search for a partner, the system limits your search to the partners associated with the customer.

Description

Enter a description of the lead. This can be the customer name, the product, or other descriptive information.

Business Unit

Enter the business unit with which the lead is associated. The default is the business unit that is associated with the PeopleSoft Sales user on the Sales User page. Or, if the person who is logged in is not a sales user, then the system uses the business unit that is specified on the person's User Preference page.

Sales Rep (sales representative)

Enter the sales representative's name (in the format *last name, first name*) for this lead. The default is the name of the PeopleSoft Sales user who is currently logged in. If your Sales access profile permits you to reassign leads, you can override the default value.

You can enter the desired sales person's name by entering a few letters of the sales user's last name and clicking the Lookup button to search for that person, or you can click Lookup without entering any letters to select from the list of all sales users that are within the specified business unit.

Revenue and **Currency**

Enter the estimated amount of revenue that you anticipate from this lead and the currency code for the revenue. The default currency code is the code that is associated with the sales user on the Sales User page.

If no products are associated with the lead, you can override the default currency code. Doing so changes the currency here and on the Product page.

Status

Select the current status of the lead.

Note. Status values are delivered as translate values; do not modify or delete them. However, if you have the required security permissions, you can create additional status values.

Delivered values are:

- *Accepted:* The lead is accepted by the assignee.
- *Closed - Duplicate:* The lead is a duplicate of an existing, active lead. (Fields remain display-only.)
- *Closed - Lost:* The lead should not be worked or updated because the sale was lost. (Fields remain display-only.)
- *Closed - Won:* The lead should not be worked or updated because the sale was won. (Fields remain display-only.)
- *Converted to Opportunity:* The lead is converted to an opportunity and is now available for pipelines and forecasts.

  Use the Convert button in the toolbar to convert a lead to an opportunity. When a lead is converted, the fields on the Lead pages remain display-only. You must access the opportunity to enter or update data.
- *Deferred:* The assignee cannot accept the lead at this time. For example, a sales representative might select this value when attempts to contact

the customer are unsuccessful and the representative wants to move on to other leads and return to this one later.

- *Imported:* The lead is imported from an external spreadsheet.
- *New:* The lead is recently created.

Note. The system assigns this value when you add a new lead. Then, when you enter data and save the page, the system changes the status to *Open*.

- *Open:* The lead is available but is not yet accepted, rejected, or turned back.
- *Referred:* The assignee refers the lead to another specified sales representative.
- *Rejected:* The assignee does not accept the lead and enters a rejection reason. When you select this value, the Reason and Comments fields appear; you must enter a reason.
- *Turnback:* The assignee resubmitted the lead for assignment to another sales representative. When you select this value, the Reason and Comments fields appear, and the Sales Rep (sales representative) field is cleared; you must enter a reason.
- *Working:* The assignee accepted the lead and is currently working it.

Note. If the lead came from PeopleSoft Telemarketing, the status of *New* or *Open* must be changed to *Accepted* or *Rejected* before you can change it to any other status.

Rating

Indicates the degree, *Hot*, *Warm,* or *Cold*, of the customer's interest or potential for making the sale.

Define rating values on the Lead Ratings page. Also, you can map scripted survey ratings to lead ratings to qualify a lead and move it from PeopleSoft Marketing or Telemarketing to Sales. If a lead is not accepted or rejected within the specified time for its rating, PeopleSoft Sales workflow can be triggered to send an email notification to the assigned sales representative and to the representative's manager. Workflow can also send an email notification to the telemarketing agent who transferred the lead and to that agent's manager.

See Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up Lead Ratings, page 34.

Priority

Select a priority to indicate the urgency of working this lead. Priority values are translate values.

Creating a Sales Opportunity

This section discusses how to create a sales opportunity.

Warning! If you use a Sybase database and your user's role has data distribution rules with 16 or more subqueries, you may get an error when you access a lead or opportunity. If you get an error, reduce the number of data distribution rules for your user's role, or reduce the complexity of the data distribution rules.

You can set up data distribution rules in Enterprise Components.

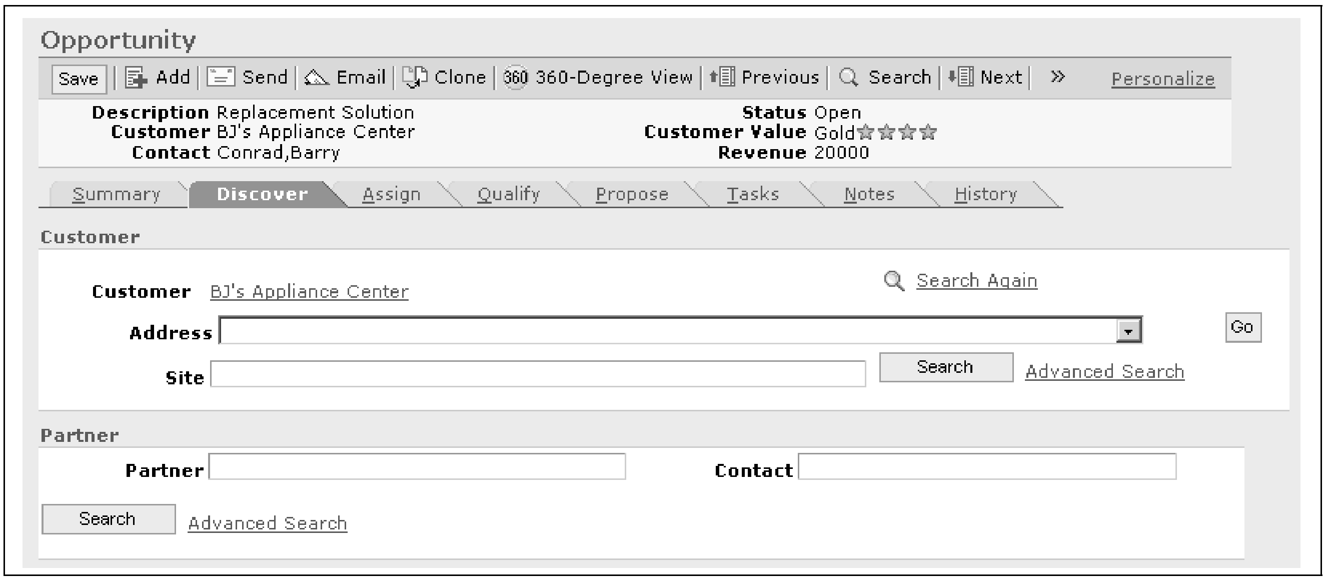
See *Enterprise Components for CRM PeopleBook*

Page Used to Create a Sales Opportunity

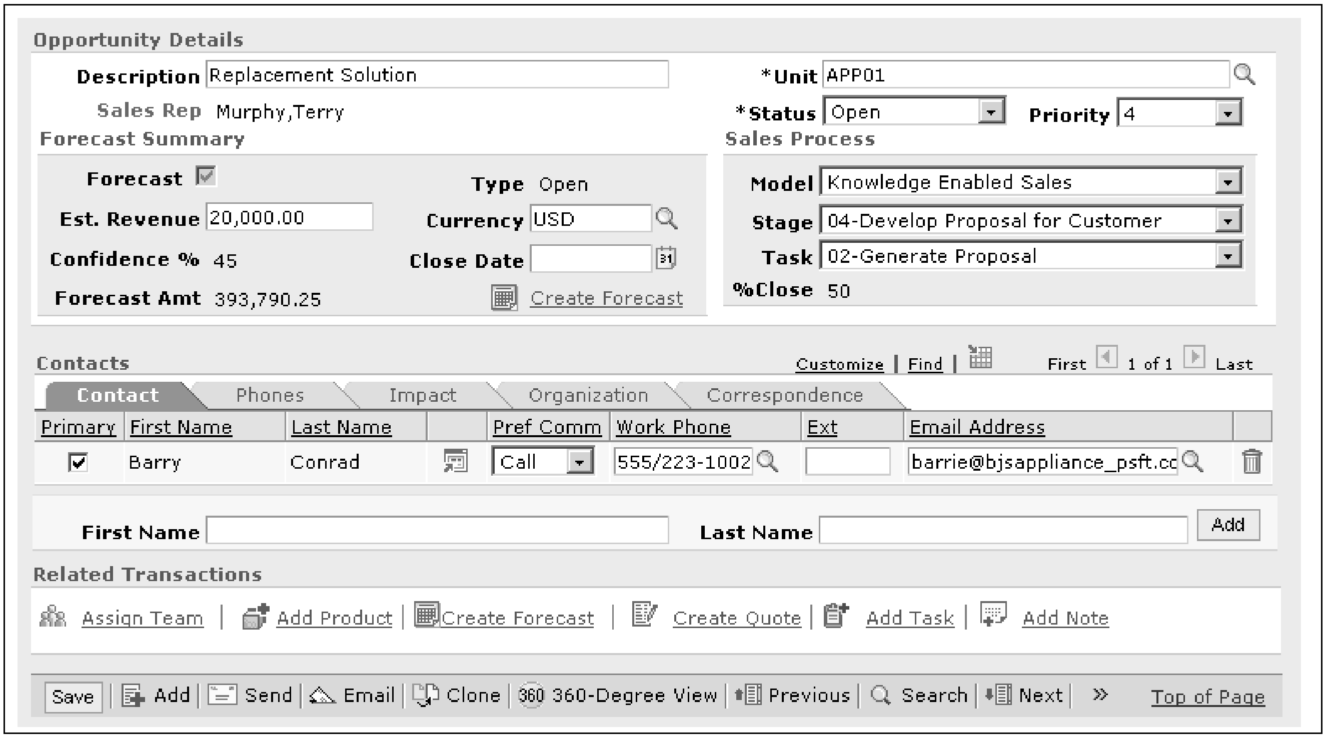
Page Name	Object Name	Navigation	Usage
Opportunity - Discover	RSF_OPP_DETAIL	Sales, Add Opportunity	Identify details about a sales opportunity, including the name, status, and rating, and the customer's name, address, and contact people.

Creating a Sales Opportunity

Access the Opportunity - Discover page.



Opportunity - Discover page (page 1 of 2)



Opportunity - Discover page (page 2 of 2)

See Chapter 10, "Creating Sales Leads and Opportunities," Selecting the Customer for a Lead or Opportunity, page 120.

See Chapter 10, "Creating Sales Leads and Opportunities," Selecting Customer Contacts for a Lead or Opportunity, page 126.

See Chapter 19, "Including Opportunities in Forecasts and Closing Opportunities," Using the Forecast Summary, page 210.

Partner and **Contact**	Before clicking the Search button, you have the option to enter characters in the Partner or Contact fields. Click the Search button to access the Search for Partner page, where you can view the results of the search and select a partner and contact for the lead. If you already have selected a customer when you search for a partner, the system limits your search to the partners associated with the customer.
Description	Enter a description of the opportunity.
Unit	Enter the business unit with which the opportunity is associated. The default is the business unit that is associated with the PeopleSoft Sales user on the Sales User page. Or, if the person who is logged in is not a Sales user, then the system uses the business unit that is specified on the person's User Preference page.
Sales Rep (sales representative)	Enter the sales representative's name (in the format *last name, first name*) for this opportunity. The default is the name of the PeopleSoft Sales user who is currently logged in. If your Sales access profile permits you to reassign opportunities, you can override the default value.
Status	Select the current status of the opportunity.

Status values are delivered as translate values; do not delete them. However, if you have the necessary permissions, you can create additional status values.

Delivered values are:

- *Open:* The sales representative or sales team is currently working this opportunity.
- *Closed - Won:* The sale is won, and the opportunity is closed. You may include opportunities with this status in pipelines and forecasts.

  When you save the page, the Opportunity Close Events page appears. You must provide the actual revenue, actual close date, and other information on this page to close the opportunity successfully and change the status to *Closed - Won.*

  See Chapter 19, "Including Opportunities in Forecasts and Closing Opportunities," Closing Opportunities, page 217.
- *Closed - Lost:* The sale is lost, and the opportunity is closed. Opportunities with this status that remain in a forecast show up as leaks.

  When you save the page, the Opportunity Close Events page appears. You must provide a fallout reason, actual close date, and other information on this page to close the opportunity successfully and change the status to *Closed - Lost.*

  See Chapter 19, "Including Opportunities in Forecasts and Closing Opportunities," Closing Opportunities, page 217.
- *Inactive:* The opportunity is on hold. Fields that are for the opportunity are unavailable for entry until the status is changed to *Open* again. Opportunities with this status are not included in pipelines or forecasts.

Priority

Select a priority to indicate the urgency of working this opportunity. Priority values are translate values.

Model

Select the overall sales process to use for this opportunity; for example, the proprietary Knowledge-Enabled Sales (KES) process.

Set up sales processes on the Sales Process page.

See Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up a Sales Process, page 27.

Stage

Select the current stage of the sales process for this opportunity. The system populates this drop-down list box with values that are based on the specified sales process.

Set up sales stages on the Sales Process page.

See Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up a Sales Process, page 27.

Task

Select the current task to perform for this opportunity. The system populates the drop-down list box with values that are based on the specified sales process and sales stage.

Set up sales tasks on the Sales Process page.

See Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up a Sales Process, page 27.

%Close (percentage close) — The system calculates this value after you enter the sales task and save the opportunity. The calculation is based on the %Close method that is associated with the specified sales process.

Selecting the Customer for a Lead or Opportunity

This section discusses how to:

- Select a customer for a lead or opportunity.
- Search for customer information.
- Use the Quick Create feature to create a customer.
- Select the customer address.
- Select the customer site address.

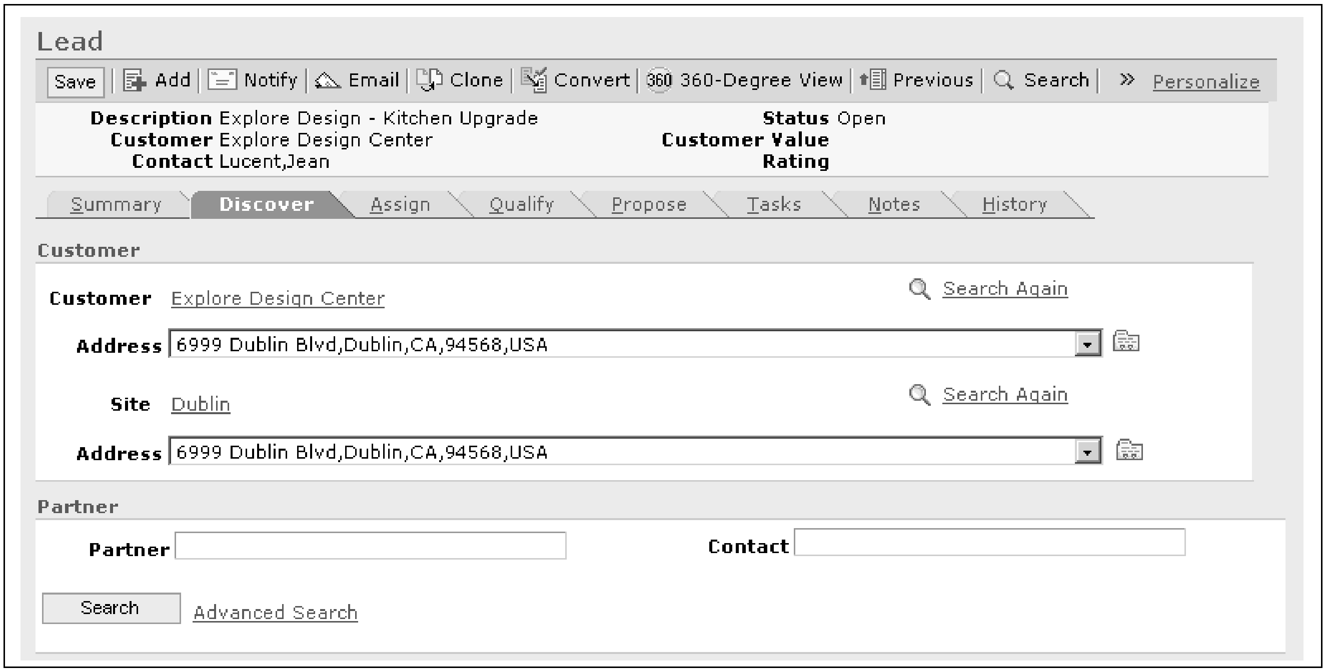
Pages Used to Select the Customer for a Lead or Opportunity

Page Name	Object Name	Navigation	Usage
Lead - Discover	RSF_LEAD_ENTRY	• Sales, Add Lead • Sales, Search Leads	Select the customer for a sales lead.
Opportunity - Discover	RSF_OPP_DETAIL	• Sales, Add Opportunity • Sales, Search Opportunities	Select the customer for a sales opportunity.
Search for Customer	RBQ_BOSRCH	From the Lead - Discover or Opportunity - Discover page, click the Search button.	Search for a customer.
Create Company	RBQ_QCREATE	From the Search for Customer page, select the Company tab and click the Add a New Company link.	Create a new company and save it in the database.
Create Consumer	RBQ_QCREATE	From the Search for Customer page, select the Consumer tab and click the Add a New Consumer link.	Create a new consumer and save it in the database.
Customer Address	RSF_LE_ADDR_SEC	From the Lead - Discover page, select —> *add address* in the Address field (the first Address field). Click Go.	Enter the customer's sold to, billing, and shipping addresses for a lead.
Customer Address	RSF_OPP_ADDR_SEC	Sales, Add Opportunity From the Opportunity - Discover page, select —> *add address* in the Address field. Click Go.	Enter or review the customer's sold to, billing, and shipping addresses for an opportunity.
Site Address	RSF_LE_SITE_SEC	From the Lead - Discover page, select *Add* in the Address field (the second Address field). Click Go.	Enter or review the customer site address for a lead.

Selecting a Customer for a Lead or Opportunity

Access the Leads - Discover page or Opportunity - Discover page.

Note. The Customer section appears on the Discover page in the Lead component and in the Opportunity component. Although the following example shows the Leads component, the information here applies to both leads and opportunities.



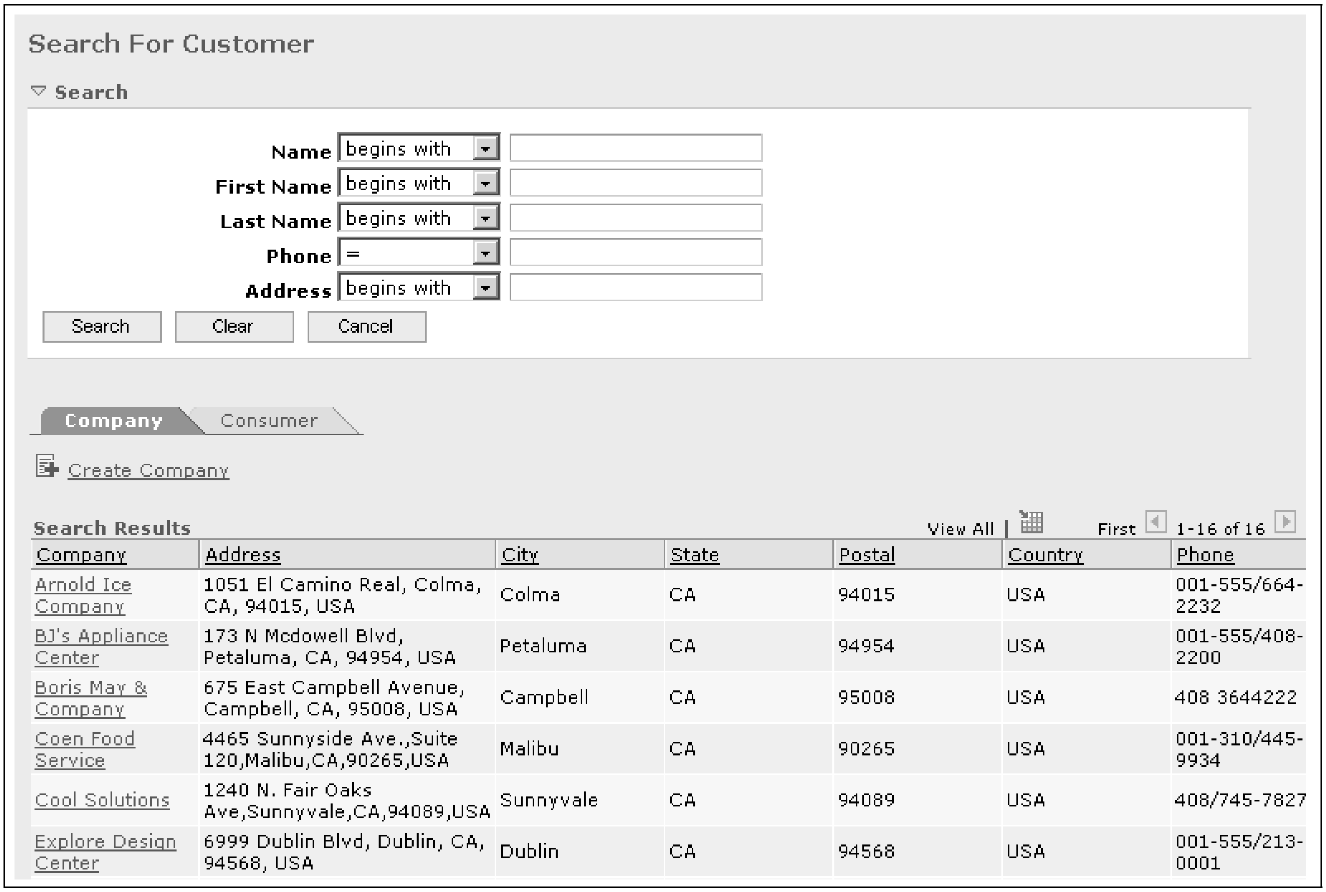
Lead - Discover page

Search	Before clicking one of the Search buttons, you must enter a business unit. Also, you have the option to enter characters in the Customer or Site fields. Click the Search button to search for customer or site data, and to determine if a customer or site already exists. If it does not exist, you can quickly create a customer or site. If you select a site before a customer, then the system automatically populates the Customer field. If you select a customer before a site, then you can only search for sites of that customer. If you already have selected a partner when you search for a customer, the system limits your search to the customers associated with the partner. See Chapter 10, “Creating Sales Leads and Opportunities,” Searching for Customer Information, page 122.
Advanced Search	Click the Advanced Search link to search for customer or site data. You can enter specific criteria to use in the search.
Address	After you select a customer, the system populates the Address field with the primary address for the customer. Use the drop-down box to choose whether to select an existing address, search for an existing address not in the list, or add a new address. Then, click the Go button to search for an address or add a new address.

Note. If you already selected a customer or a site, the system displays a Search Again link instead of the Search box and Advanced Search link.

Searching for Customer Information

Access the Search For Customer page. To select or add a company, click the Company tab. To select or add a consumer, click the Consumer tab.



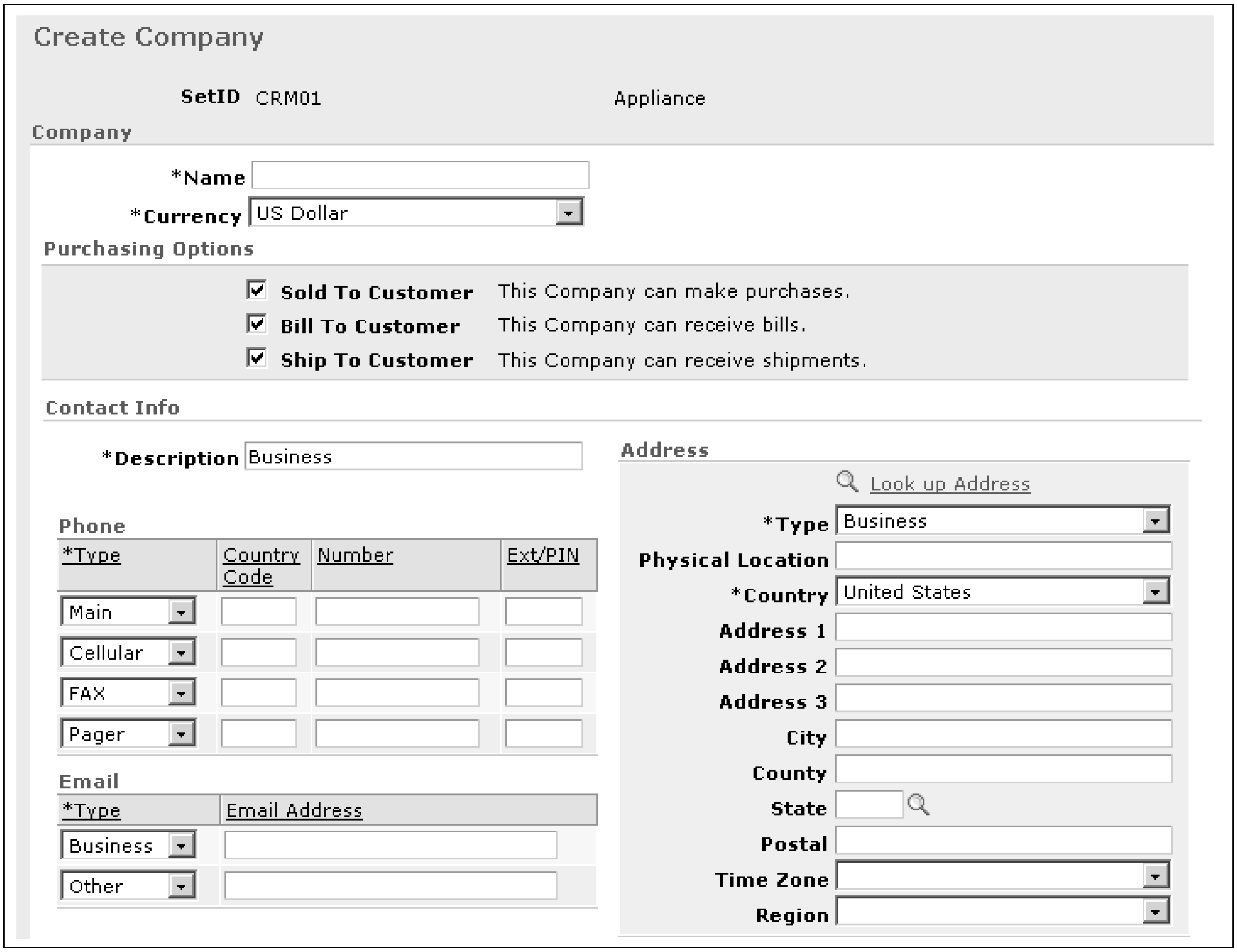
Search for Customer page

To select a customer, click on a company or consumer in the Search Results section. To add a new company or consumer, click the Create a New Company link or Create a New Consumer link.

Using the Quick Create Feature to Create a Customer

Access the Create Company page or the Create Consumer page.

When you use the Quick Create feature, you enter the customer information directly into the database, and the customer entry immediately becomes available for searching.



Create Company page

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Using Business Object Search and Quick Create Functionality,” Creating Business Objects by Using the Quick Create Component

Selecting the Customer Address

Access the Lead - Discover page or Opportunity - Discover page.

After you select or add a customer, the system displays the Address drop-down box and populates it with the address of the customer. In the Address drop-down box, you can choose to search for a different address or add a new address. After you click the Go button, the system displays the Customer Address page.

Note. Although the following example shows a customer address, the information applies to both the Customer Address page and the Site Address page.

Customer Address page

Note. In PeopleSoft Sales, you can save only one customer address and one customer site address for each customer for the lead or opportunity. However, you can create multiple addresses for the same customer in the database. To add or update addresses in the database, use the Quick Create pages or customer information pages under the CRM Customer menu.

OK

Click to save data on this page and make it available for viewing or updating later. The system displays the beginning of the address in the Address drop-down box for the Customer or Site field on the Lead - Discover page or Opportunity - Discover page.

Search

Click to search for an address to determine if it already exists.

Note. If an address already exists and you enter it again, the system creates a duplicate entry in the database. To avoid duplicates, always search first to determine if the address exists before adding it.

If the address already exists, select it from the list. The system displays the Customer Address page and with the address and its associated purchasing options designations *(Sold To Address*, *Billing Address*, and *Shipping Address)*.

The Enter New Address button becomes available.

Selecting the Customer Site Address

Access the Site Address page.

Note. Fields on the Site Address page function in the same way as the fields on the Customer Address page.

See Chapter 10, “Creating Sales Leads and Opportunities,” Selecting the Customer Address, page 124.

Selecting Customer Contacts for a Lead or Opportunity

This section discusses how to:

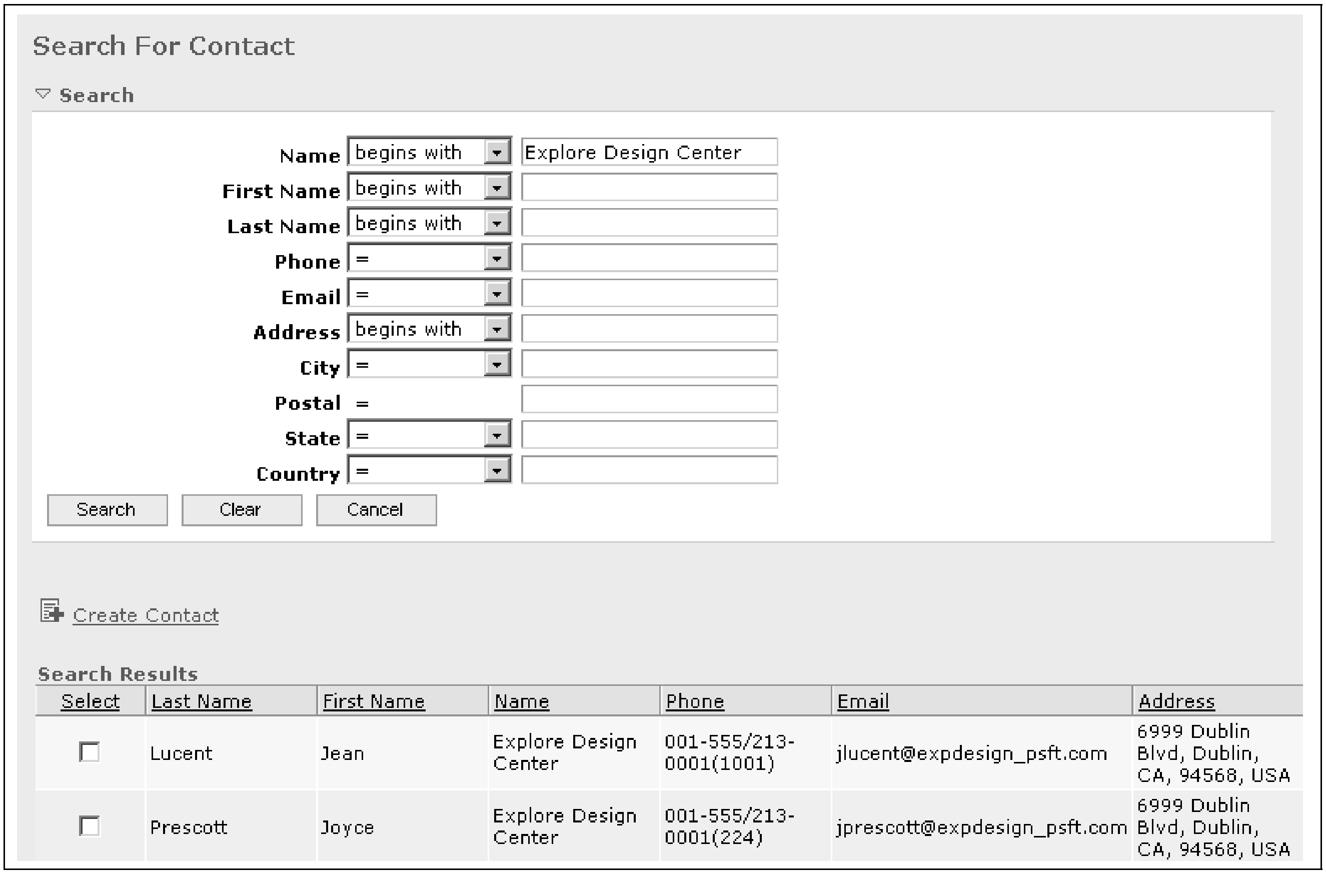
- Search for customer contacts.
- Use the Quick Create feature to create a contact.
- Update customer contact information.

Pages Used to Select Customer Contacts for a Lead or Opportunity

Page Name	Object Name	Navigation	Usage
Lead - Discover	RSF_LEAD_ENTRY	• Sales, Add Lead • Sales, Search Leads	Enter or view data for a lead.
Opportunity - Discover	RSF_OPP_DETAIL	• Sales, Add Opportunity • Sales, Search Opportunities	Enter or view data for an opportunity.
Search for Contact	RBQ_BOSRCH	From the Lead - Discover or Opportunity - Discover page, click the Add button.	Search for a contact.
Create Contact	RBQ_QCREATE	From the Search for Contact page, click the Add a New Contact link.	Create a new contact and save it in the database.

Searching for Customer Contacts

Access the Search For Contact page.



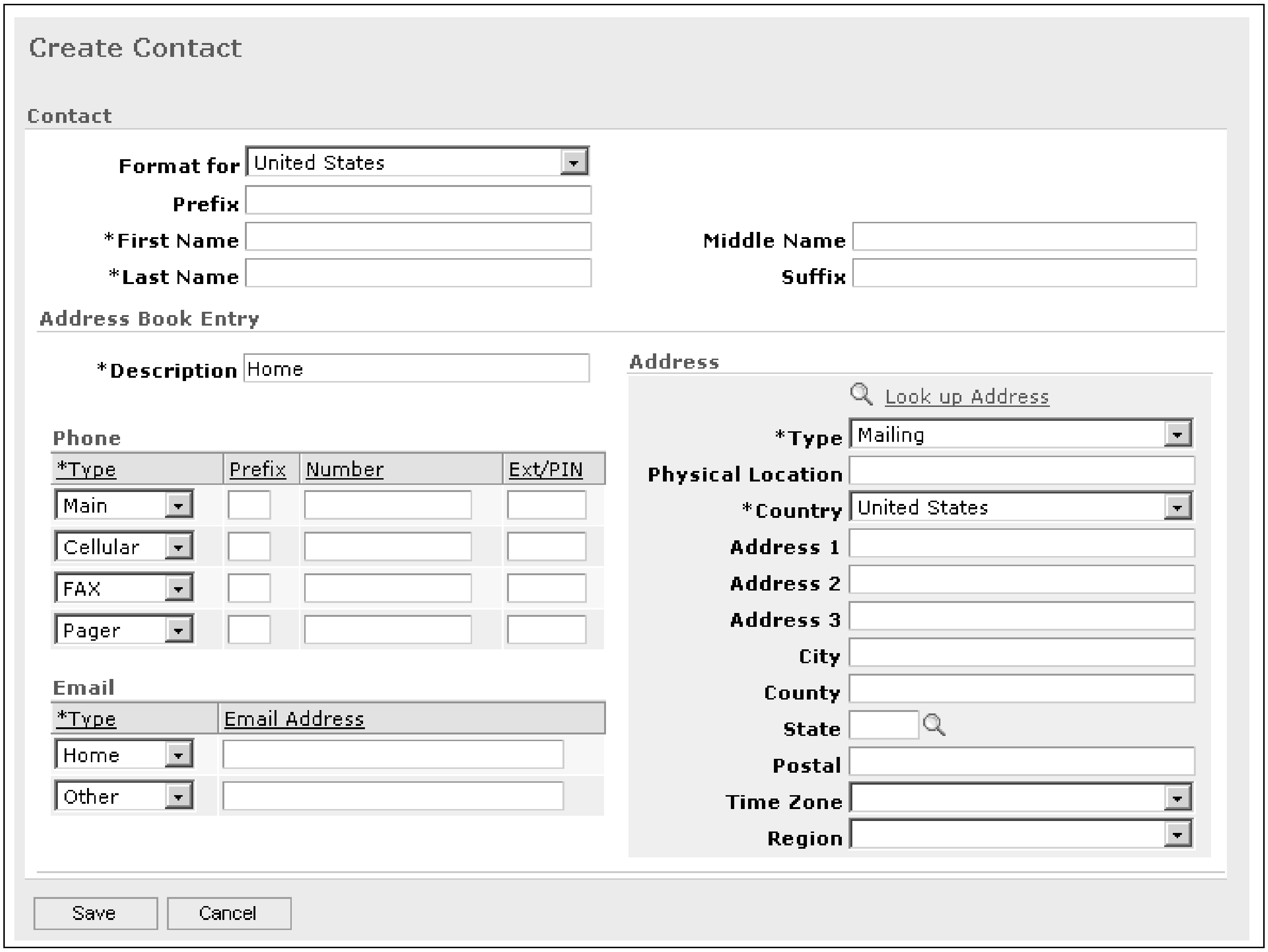
Search for Contact page

If you select a customer before searching for a contact, the system adds the name of the customer to the Name field. This limits the search to contacts of the specific customer. The system carries over the text that you enter on the Lead - Discover page or Opportunity - Discover page for the contact name to search. You can override the text here. You can also enter search criteria for a phone number, email address or person ID. If you select a contact that is not associated with the customer specified on the lead or opportunity, the system adds the relationship of the contact to the customer when you save.

Search	Click Search to launch the search and display results in the grid at the bottom of the page.
Select (check box)	Select the contacts to associate with the customer. If the system finds an exact match for the search criteria, it hides the Select check box and changes the Last Name and First Name field value into a link. Select the link to select the user and return to the Discover page.
Select (button)	Click this button to associate the selected contacts with the customer, and to return to the Discover page, where the system displays data for the contacts that you select.
Create a New Contact	Click to access the Create Contact page to create a new contact if, after searching, you determine that a contact does not exist.

Using Quick Create to Create a Contact

When you use the Quick Create feature, you enter the customer contact directly into the database, and that contact becomes available immediately for searching.



Create Contact page

See Also

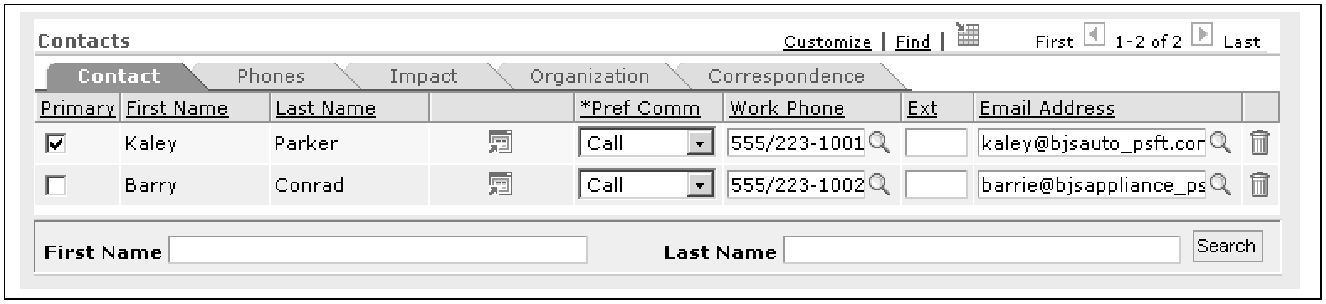
PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, "Using Business Object Search and Quick Create Functionality," Creating Business Objects by Using the Quick Create Component

Updating Customer Contact Information

Access the Lead - Discover page or the Opportunity - Discover page.

Note. If you make edits to contact information in PeopleSoft Sales, the system updates the contact information in the Customer Data Model tables.

Note. The Contacts section appears on the Discover page in the Lead and Opportunity component. Although the example shows lead details, the information here applies to both leads and opportunities.



Lead - Discover page: Contact tab

Contact

Primary — Select to indicate the primary contact for this lead. You can create only one primary contact.

Pref Comm (preferred communication) — Select the contact person's preferred method of communication.

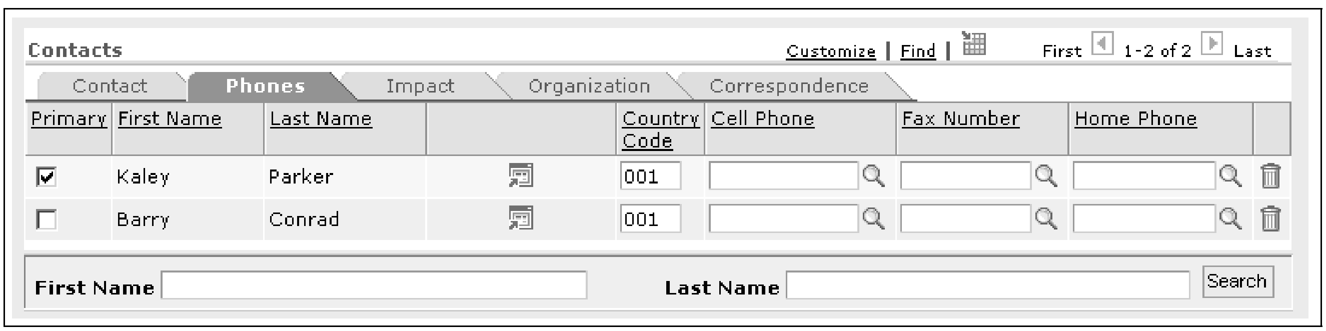
Communication methods are delivered as translate values that you can modify if you have the necessary permissions.

Work Phone and **Ext** (extension) — Enter the contact's work phone number here. (Enter additional phone numbers on the Phones tab.)

Email Address — Enter the contact's email address. This address is required if you plan to email the proposal.

Phones

Select the Phones tab.

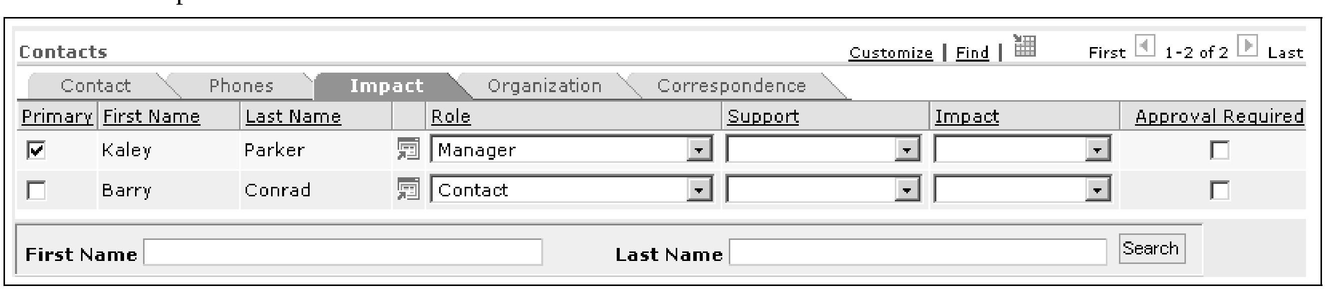


Lead - Discover page: Phones tab

Enter all but the contact's work phone number. Enter the contact's work phone number on the Contact tab.

Impact

Select the Impact tab.



Lead - Discover page: Impact tab

Enter information to identify the contact’s impact on the customer’s decision to make this purchase.

Note. You identify the contact’s decision-making role on the Contact tab, and the contact’s business title on the Organization tab.

Role

Select a role that best identifies the role of the contact.

Note. Do not confuse roles with business titles, which you enter on the Organization tab.

Support

Select the type of support that the contact shows for this purchase.

Define support values on the Supports page.

See Chapter 4, “Setting Up Sales Leads and Opportunities,” Setting Up Contact Support Levels, page 39.

Impact

Select the impact that this contact has on the customer’s decision to make this purchase.

Define impact values on the Impacts page.

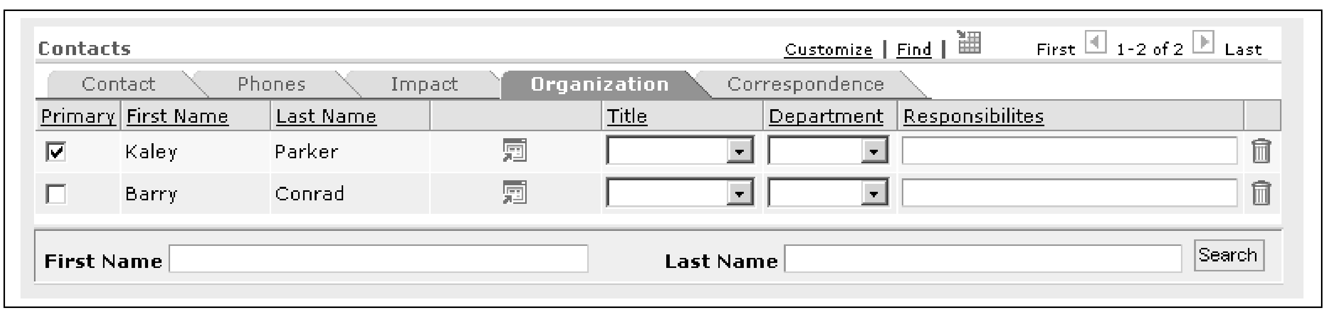
See Chapter 4, “Setting Up Sales Leads and Opportunities,” Setting Up Contact Impact Levels, page 40.

Approval Required

Select to indicate that the contact must grant approval on behalf of the customer for the sale to go through. For example, if the individual is influential in the company but does not have final approval, clear this check box.

Organization

Select the Organization tab.



Lead - Discover page: Organization tab

Enter the contact’s business title, department, and responsibilities. Set up contact titles and departments on the Titles page and the Departments page.

See Chapter 4, “Setting Up Sales Leads and Opportunities,” Setting Up Contact Titles, page 40.

Cloning a Sales Lead or Opportunity

This section discusses how to clone an existing sales lead or opportunity.

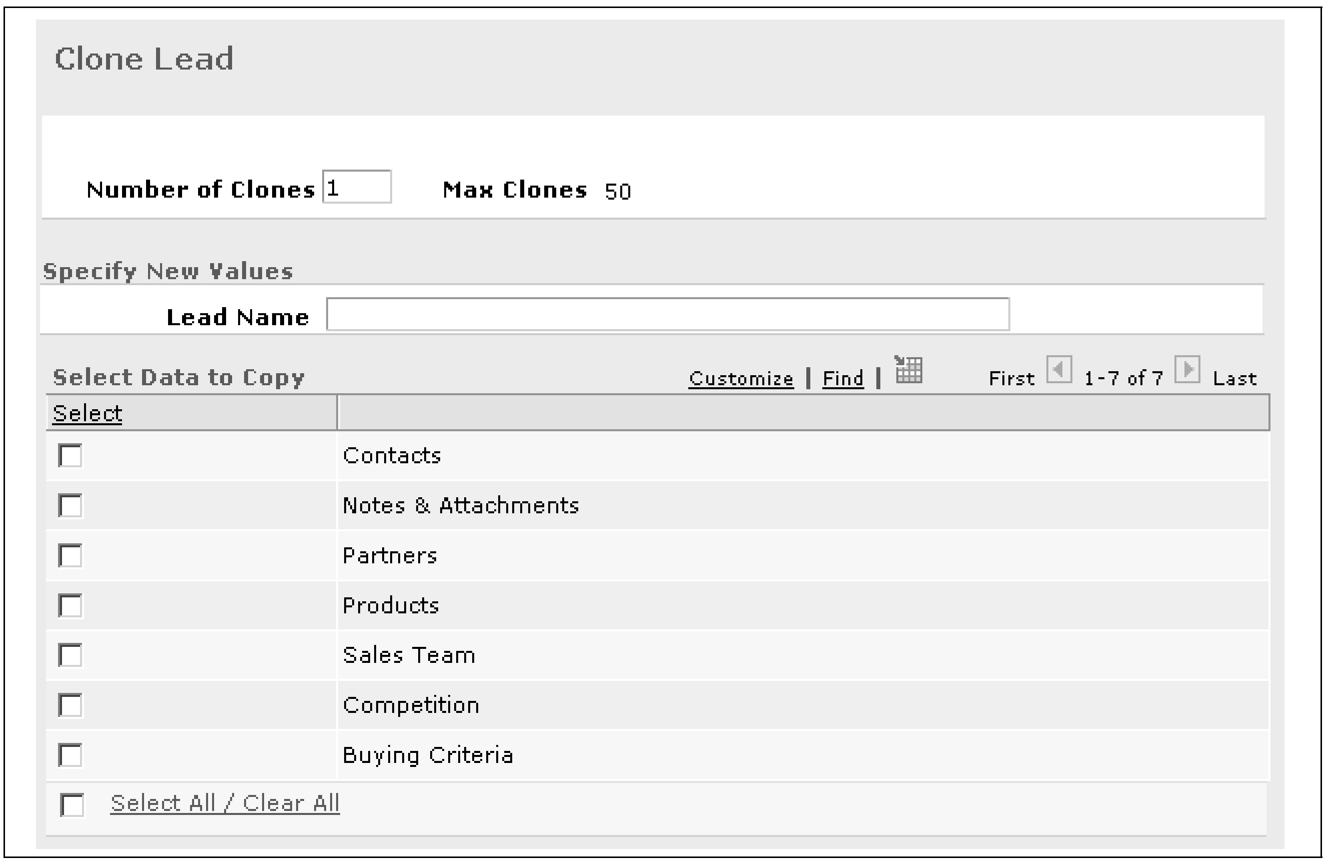
Page Used to Clone a Sales Lead or Opportunity

Page Name	Object Name	Navigation	Usage
Clone Lead	RB_CLONE_TXN_SEC	Sales, Search Leads Select a lead and click the Clone link in the toolbar.	Clone a lead.
Clone Opportunity	RB_CLONE_TXN_SEC	Sales, Search Opportunities Select an opportunity and click the Clone link in the toolbar.	Clone an opportunity.

Cloning an Existing Lead or Opportunity

Access the Clone Lead or Clone Opportunity page.

Note. Although the following example shows the Clone Lead page, the information also applies to the Clone Opportunity page.



Clone Lead page

Number of Clones
Enter the number of copies that you want to make from the original lead or opportunity. The system creates the clones and appends the number of copies to the lead description.

Lead Name
Enter a name or description for the new lead or opportunity that you want to create.

Select Select the data that you want to copy from the original to the clone.

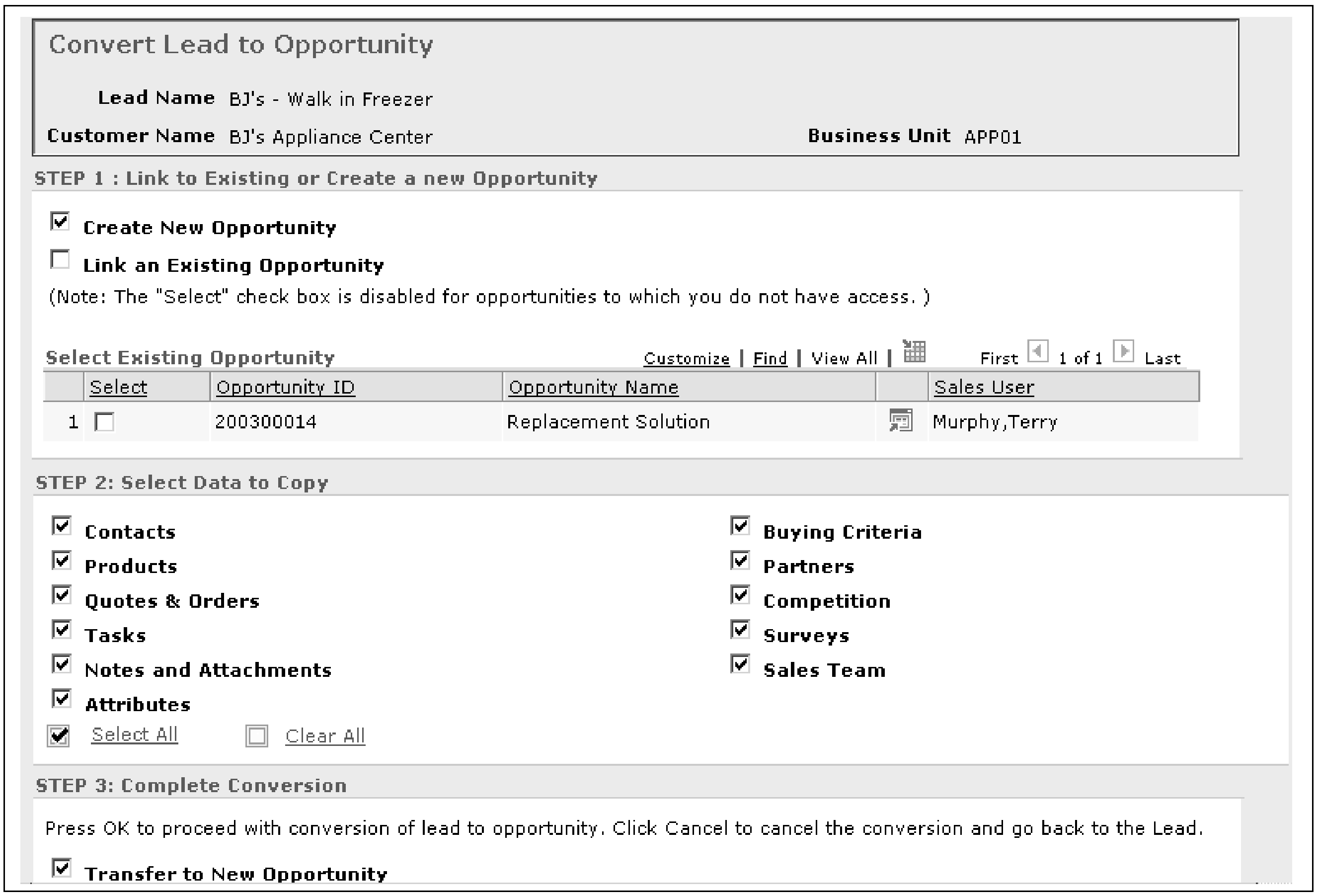
Converting a Lead to an Opportunity

Page Used to Convert a Lead to an Opportunity

Page Name	Object Name	Navigation	Usage
Convert Lead to Opportunity	RSF_LE_OPP_SEC	Click the Convert link on any page in the Lead component.	Convert a lead to an opportunity.

Converting a Lead to an Opportunity

Access the Convert Lead to Opportunity page.



Convert Lead to Opportunity page

STEP 1: Link to Existing or Create a new Opportunity

Select Select to convert and merge the lead into an existing opportunity.

Create New Opportunity Select to convert the lead into a new opportunity.

Note. This region appears only if there are opportunities.

STEP 2: Select Data to Copy

(Check boxes)	Select the data to carry over from the lead to the opportunity. If you associate the lead with an existing opportunity, the system adds the selected information from the lead to the selected opportunity.

STEP 3: Complete Conversion

Transfer to New Opportunity	Select to transfer to the opportunity when you click OK. When clear, the system returns you to the Leads page that you were on when you clicked the OK button.
OK	Click to have the system save the opportunity to the opportunities list and the Opportunities details component. The opportunity is available for you to continue updating and managing it. To immediately access the new opportunity upon successful conversion, select the Transfer to Opportunity check box before clicking OK.

CHAPTER 11

Importing Sales Leads

This chapter discusses how to import sales lead data.

Importing Sales Leads Data

You can import leads data into your system from an external comma-separated values (CSV) file. However, before you can import the data, you must create a database template to receive the data. You must also create an import map to identify the items from the spreadsheet that populate the various fields in the database template. A default template and map exist in the delivered database. You can use these as a model for creating other templates or maps.

This section provides an overview of the data import process and discusses how to:

- Import leads data from an external file.
- View a template definition.
- View lead import results.
- View lead import errors.
- Search for imported data.

See Also

Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up Sales Lead Import Templates, page 52

Understanding the Data Import Process

You can upload a CSV spreadsheet (such as a Microsoft Excel spreadsheet), map the columns on the spreadsheet to fields in your database, and run an automated process to import the data from the spreadsheet into PeopleSoft Sales. You can import data from any comma-delimited spreadsheet, including telemarketing spreadsheets, spreadsheets from trade shows, or your own personal spreadsheets. When you import leads, the system stores the data in the Leads table and the Customer Data Model tables.

See *CRM Business Object Management PeopleBook*

PeopleSoft Sales is shipped with a predefined lead import template and map for importing leads data. When you upload a spreadsheet and select the import template and import map, the system displays a list of the column headings and the closest matching database field name. The system also provides other field names from which to choose for each column. If the system's automatic mapping produces the correct results, then select the columns to use and run the import process.

If the results of the automatic mapping are not correct, use the fields to select a different field name and column mapping. Then, name and save the map to make it available from the specified template in the future.

You can create and save as many maps as you want. You can also create new templates. When you create a template, the system automatically creates a default import map for you.

Note. To create import templates, you must have the proper security permissions in your PeopleSoft Sales access profile.

See Also

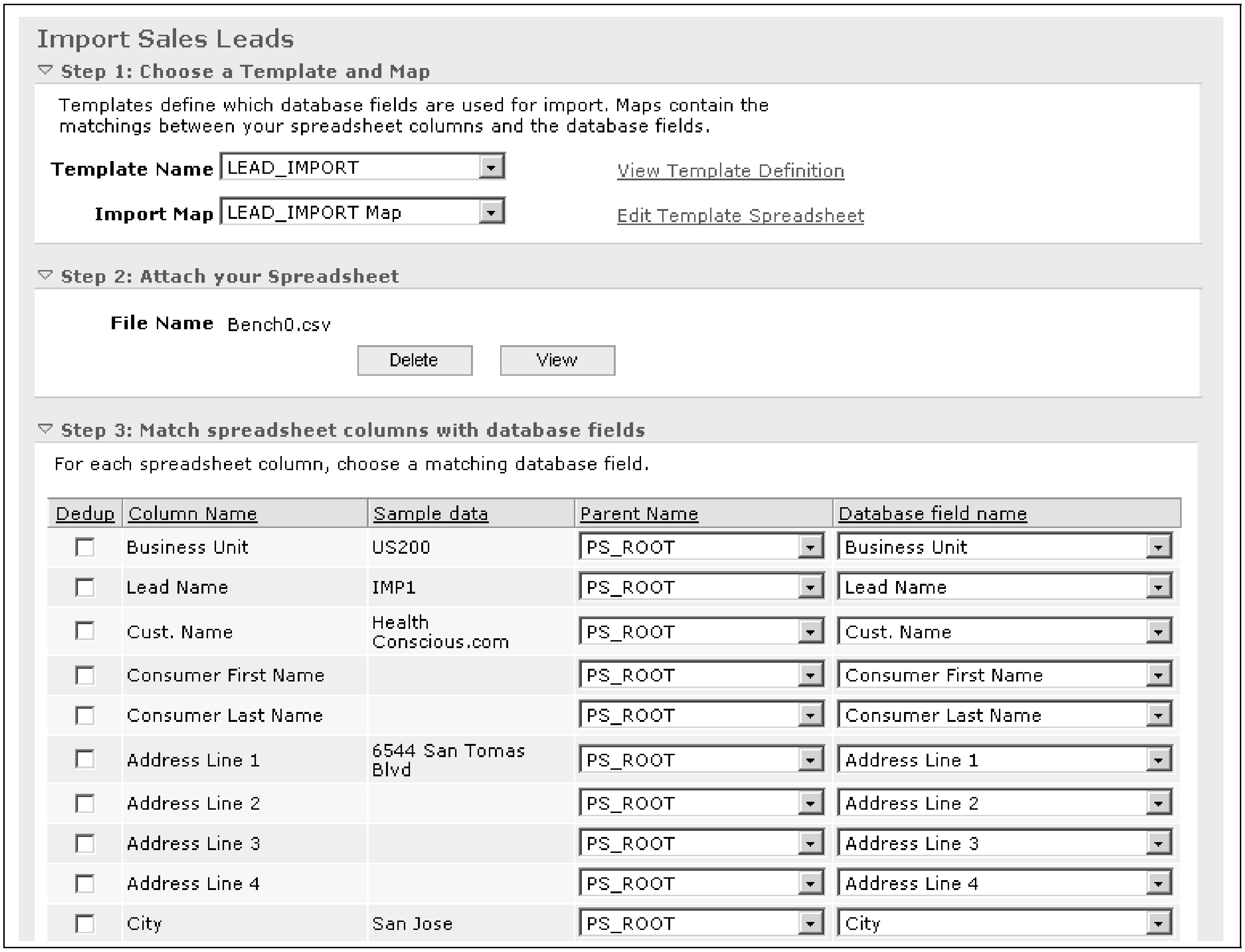
Chapter 4, “Setting Up Sales Leads and Opportunities,” Setting Up Sales Lead Import Templates, page 52

Pages Used to Import Sales Leads Data

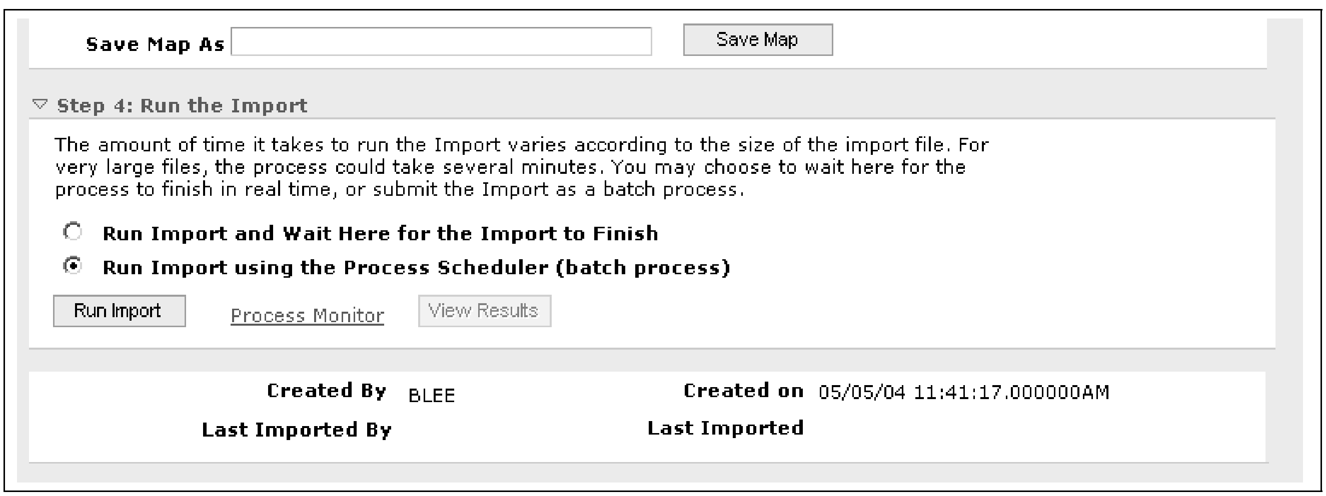
Page Name	Object Name	Navigation	Usage
Import Sales Leads	RB_IMP_RUN	Sales, Import Leads	Select the template, map, and spreadsheet for importing leads data and run the import process.
Lead Import Template	RB_IMP_TEMPL_DISPL	Click the View Template Definition link on the Import Sales Leads page.	View a display-only version of the specified template’s definition.
Sales Leads Import Results	RSF_LE_IMP_RESULTS	Sales, Import Leads Click the View Results button.	View results of the leads data import process.
Lead Import Errors	RSF_LE_VIV_ERR	Sales, Leads, Import Sales Leads Click the View Errors button on the Sales Lead Import Results page.	View results of the leads data import process.
Search Lead Imports	RB_IMP_SEARCH	Sales, Leads, Search Lead Imports	Search for imported leads data.

Importing Leads Data from an External File

Access the Import Sales Leads page.



Import Sales Leads page (1 of 2)



Import Sales Leads page (2 of 2)

Step 1: Choose a Template and Map

Template Name Select the import template to use. Import templates identify the components from which to pull database fields.

View Template Definition Select to access a display-only version of the Import Template page for a specified template.

Import Map Select the import map to use. The import map identifies which spreadsheet columns populate the various fields in your database, and it identifies which columns to import.

Edit Template Spreadsheet Select to launch a new window with the Microsoft Excel spreadsheet template with column headings only. You can enter data (including placeholder data for required fields) or paste data from another spreadsheet.

Note. If you make changes, be sure to save the spreadsheet before closing the window.

Step 2: Attach your Spreadsheet

Add Click to access the search page, where you can enter or browse for the path to the comma-delimited file of leads data to import.

Upload Click to upload the file, after identifying the path to the file. The system loads the spreadsheet and attempts to map the spreadsheet columns to the database fields identified on the selected template and map. The system accesses the Import Sales Leads page and displays the name of the uploaded file and mapping results.

Delete Click to delete the uploaded file. The Add button appears. Click Add to browse for a different file to upload.

View Click to open a new window, where you can view the uploaded spreadsheet to confirm that it is the spreadsheet to use.

Step 3: Match spreadsheet columns with database fields

If the columns and fields are acceptable as mapped, run the import process by selecting options in the Step 4: Run the Import group box.

If the automatic mapping is not acceptable, select the correct field for each column from the Parent Name and Database field name fields. Then, enter a map name in the Save Map As field, and click Save Map. The map appears in the map drop-down list for that template.

Note. The Dedup check boxes indicate data that the system uses to check for duplicates. You specify the data for determining duplicates when you create the template definition. If you have the necessary permissions, you can edit theDedup check boxes used for determining duplicates.

See Chapter 4, “Setting Up Sales Leads and Opportunities,” Setting Up Sales Lead Import Templates, page 52.

Step 4: Run the Import

Specify how the import runs—in real time or in a batch process at a later time.

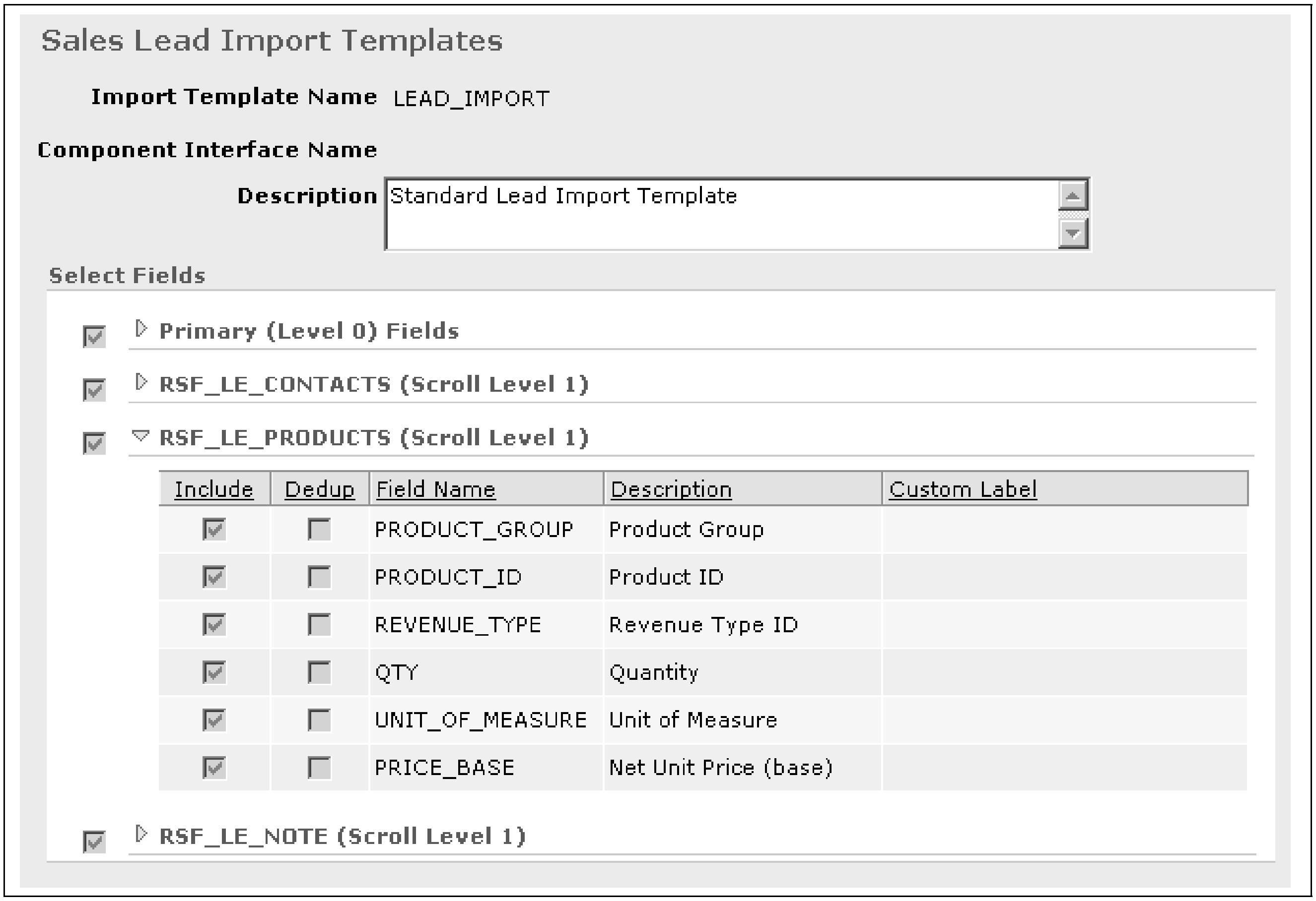
Run Import Click to submit the run request to the system.

View Results Click to view your import results after the process has run.

Process Monitor Click to access the Process List page, where you can confirm that your request was received and determine its status, after submitting the run request.

Viewing a Template Definition

Access the Lead Import Template page.



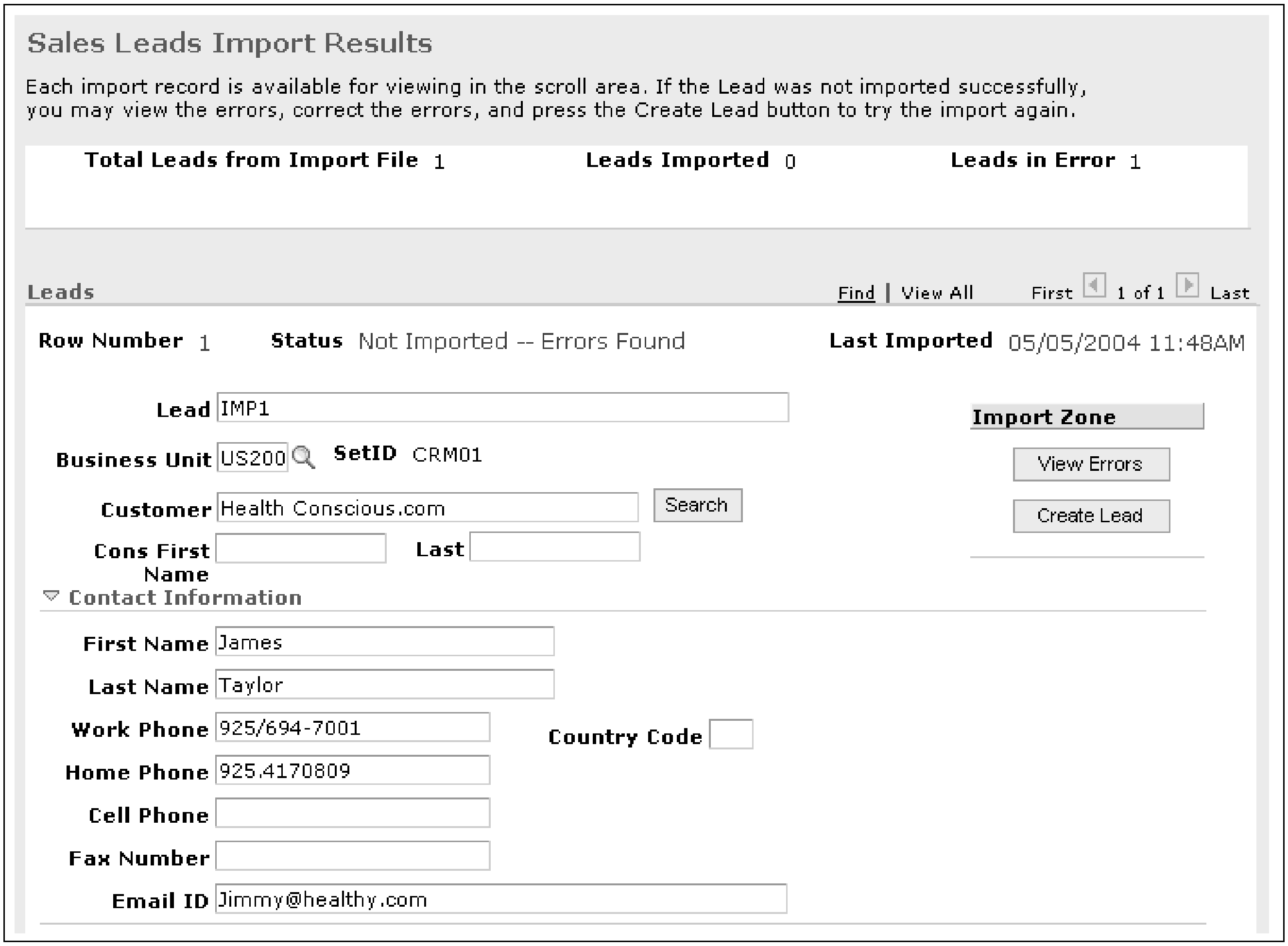
Sales Lead Import Templates page

This page is a display-only version of the Import Template page, so that you can view the template definition. To create or edit an import template, you must access the editable version of this page, if your PeopleSoft Sales access profile permits.

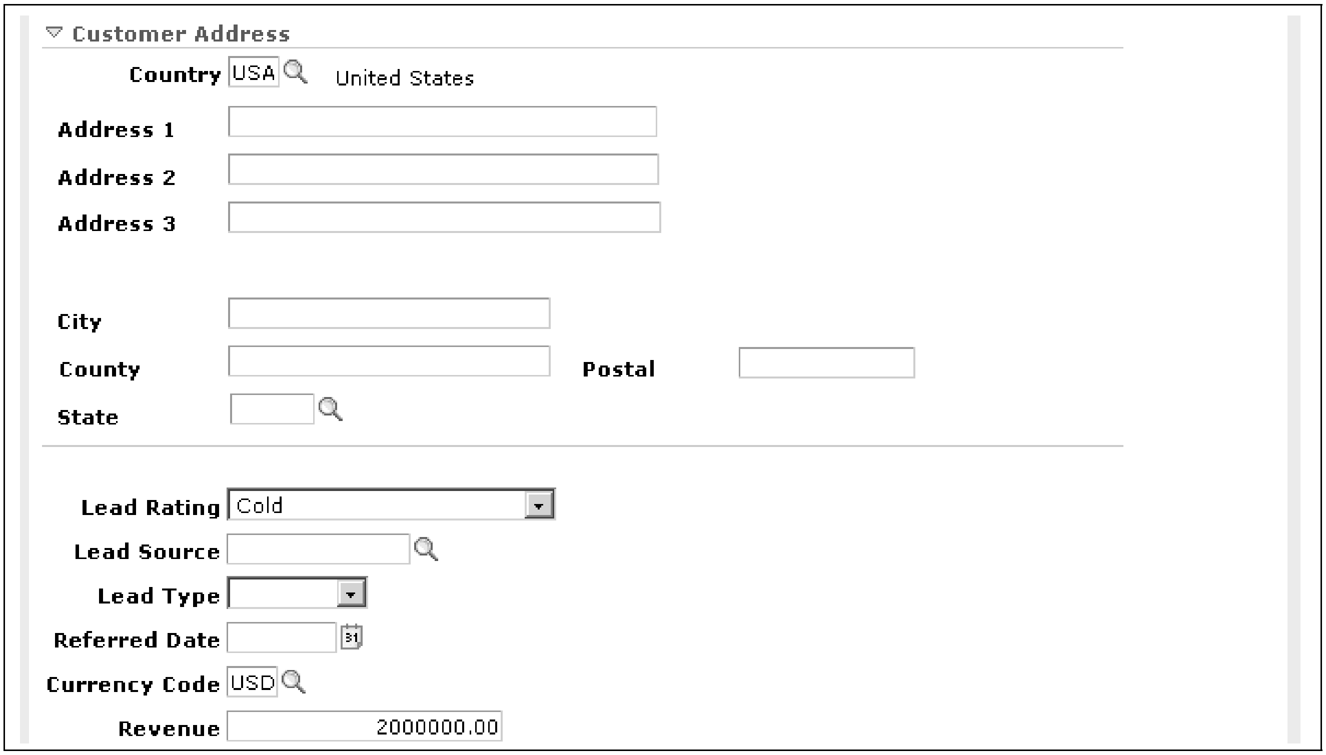
See Chapter 4, “Setting Up Sales Leads and Opportunities,” Setting Up Sales Lead Import Templates, page 52.

Viewing Leads Import Results

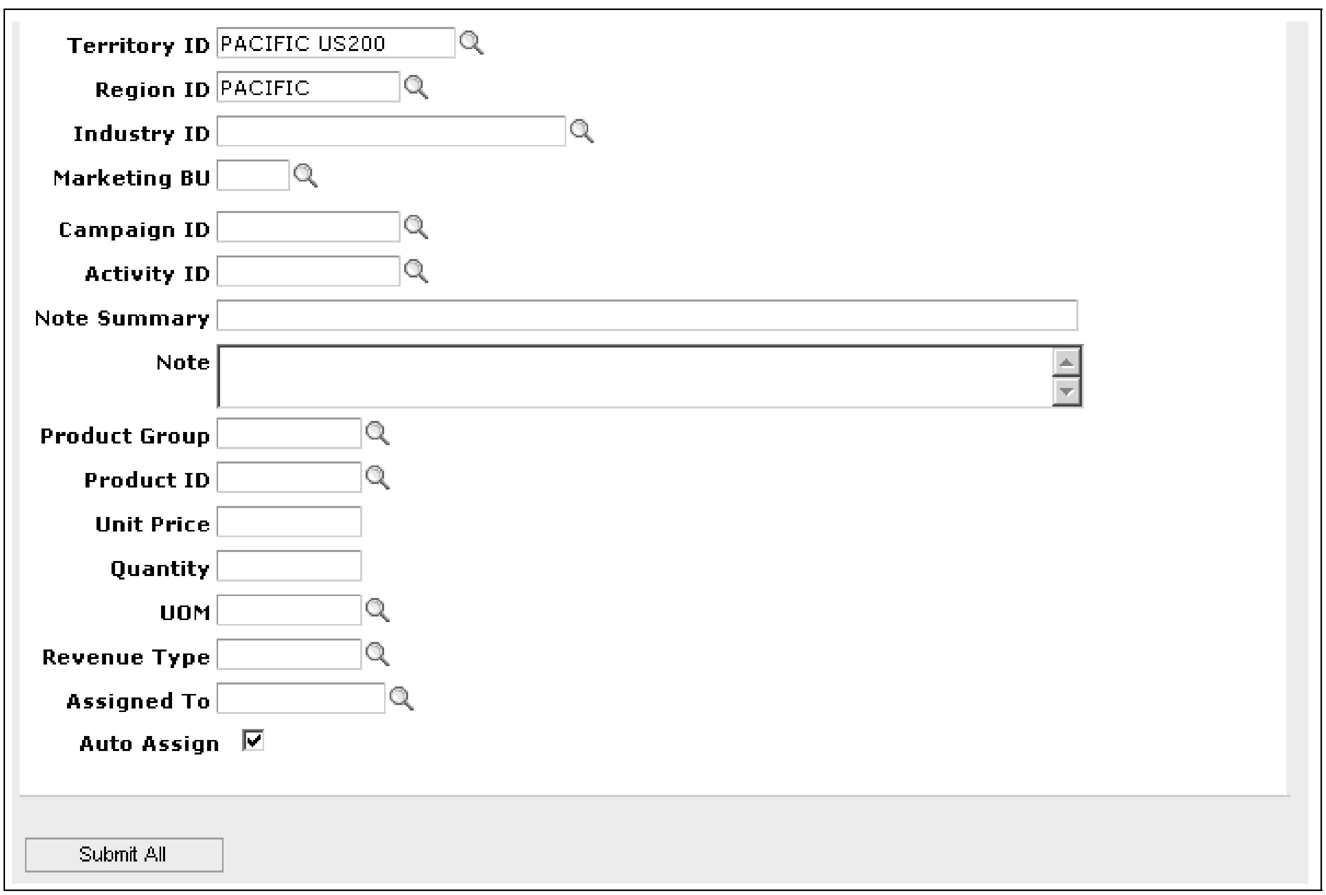
Access the Sales Leads Import Results page.



Sales Leads Import Results page (1 of 3)



Sales Leads Import Results page (2 of 3)



Sales Leads Import Results page (3 of 3)

View the details of each lead that was imported. Edit imported data as necessary.

When the data is correct, click Submit All to submit all leads data without further adjustment.

Note. If an imported lead has a sales representative's person ID in an ID column, the system assigns the lead to that representative. If the imported lead has no person ID and the Auto Assign check box is not selected, the system enters a status of *Unassigned* on the Lead - Discover page. If you select the Auto Assign check box, the system assigns a sales representative by using a territory tree.

Import Zone

If errors occurred during the import process, the Import Zone group box appears.

View Errors Click to access the Lead Import Errors page, where you can determine the errors that occurred.

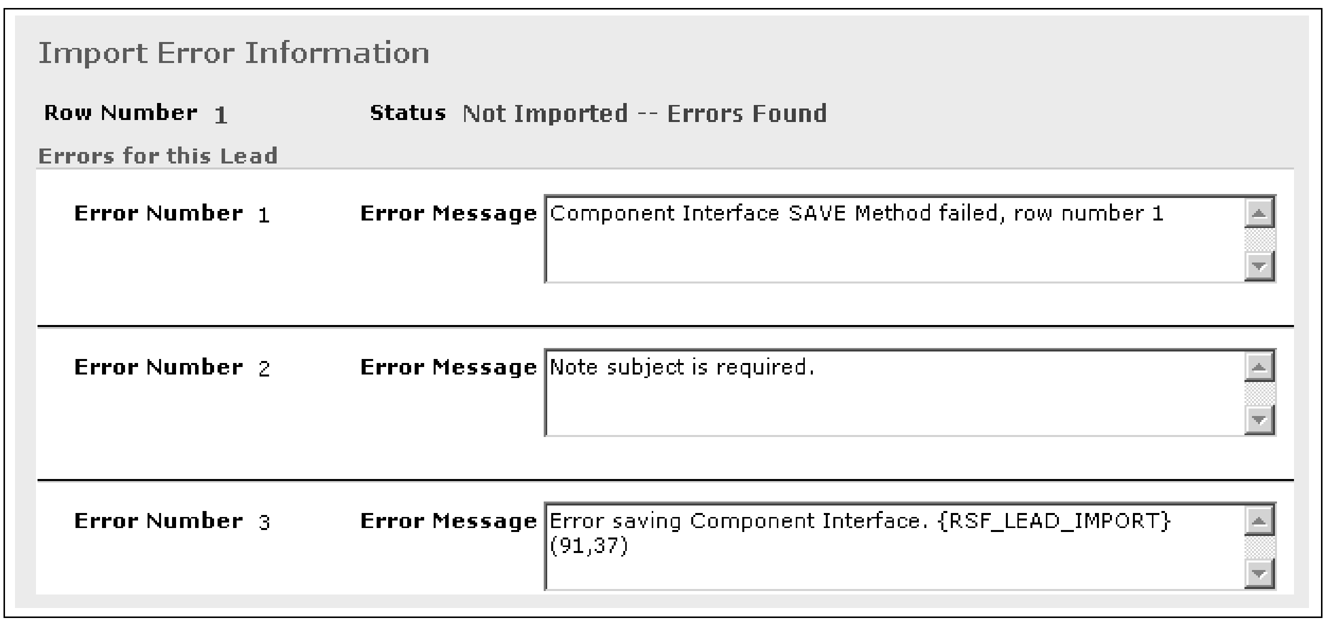
Create Lead Click to import leads one by one. Each time that you click this button, the system submits only the lead that appears in the Sales Leads group box.

See Also

Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up Sales Lead Import Templates, page 52

Viewing Lead Import Errors

Access the Import Error Information page.

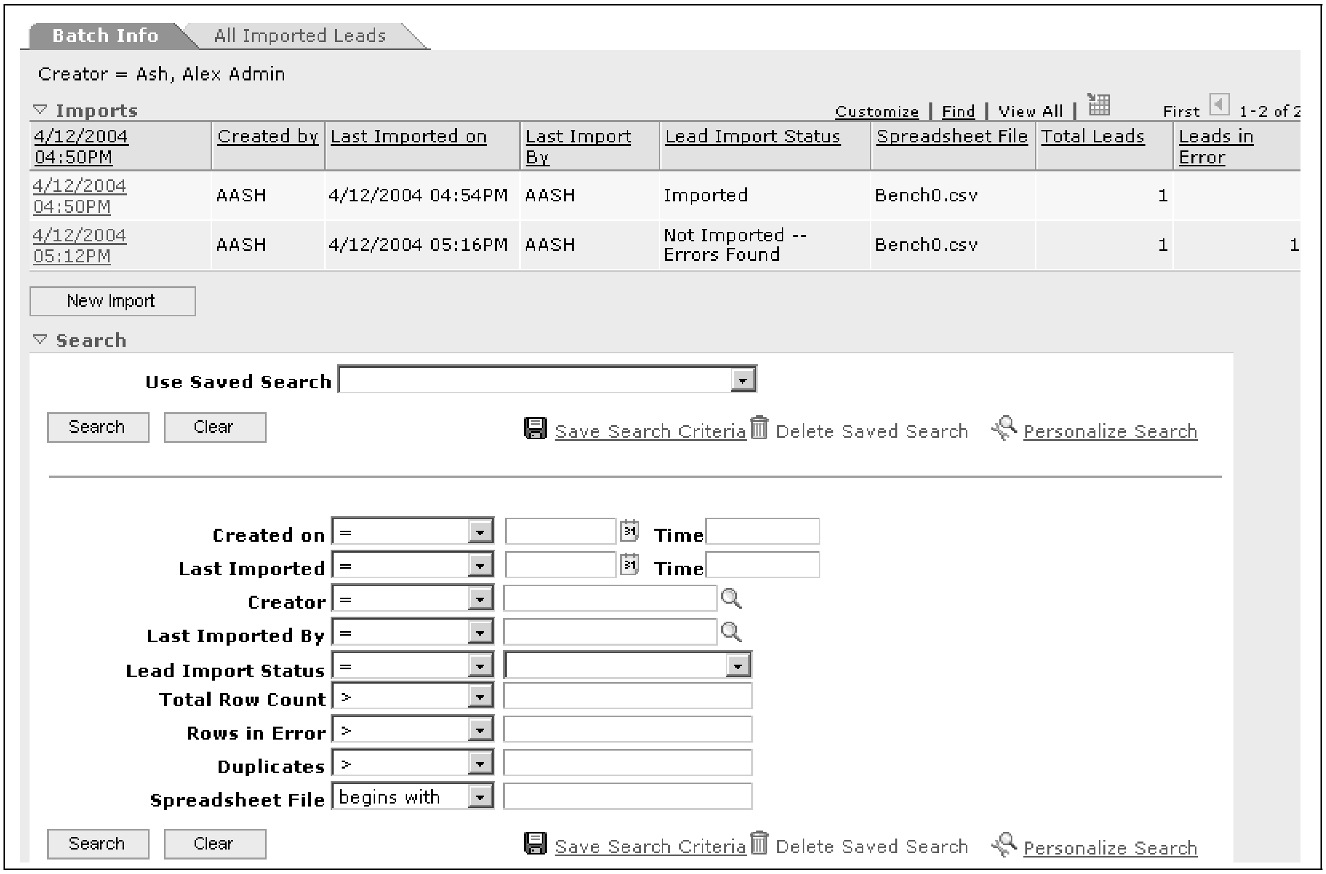


Import Error Information page

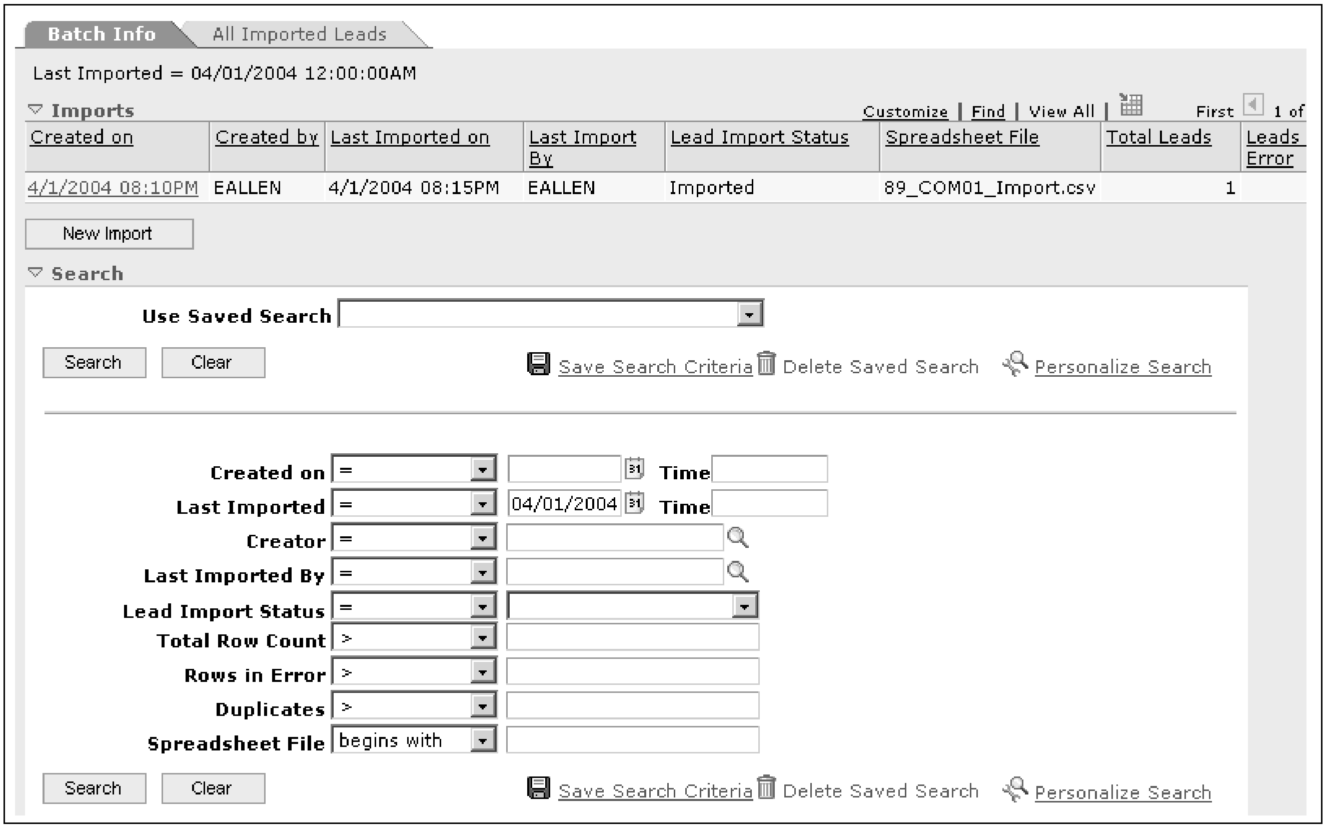
Determine the nature of each import error, so that you can decide how to fix it.

Searching for Imported Data

Use the Search Lead Imports page as a list page to search for and view import results.



Batch Info (batch information) page



All Imported Leads page

Use the Batch Info page to search for and view a list of imported leads data by run parameters.

Use the All Imported Leads page to search for and view a list of imported leads data by lead parameters.

See Also

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

CHAPTER 12

Assigning a Lead or Opportunity

This chapter provides an overview of sales representative assignment and discusses how to:

- Assign sales representatives to a lead or opportunity.
- Accept, reject, or turn back a lead assignment.
- Assign partners to a lead or opportunity.
- Reassign a sales representative's leads and opportunities.

Common Elements Used in This Chapter

New Rep (new representative)	Select the new sales representative to assign to a lead, opportunity, or account on a reassignment worksheet.
New Territory	Select the territory for the new sales representative on a reassignment worksheet.

Understanding Sales Representative Assignment

PeopleSoft Sales offers three methods of assigning sales representatives to the sales team for a lead or opportunity:

- You can manually choose sales representatives or a sales team to assign to the lead sales team or the opportunity sales team.
- You can use the assignment engine to generate a list of sales representatives from the highest ranked territories and then manually select representatives from the list.

  The assignment engine uses options and criteria specified on the assignment group to determine the highest ranked territories.
- You can use the assignment engine to select a sales representative automatically based on options and criteria that you specify on the assignment group.

See Chapter 6, "Configuring Assignment Criteria," Understanding Assignment Groups, page 73.

Assigning Sales Representatives to a Lead or Opportunity

This section discusses how to:

- Assign the sales representative.
- Select sales representatives to assign.
- Maintain data for the sales representative assignment.

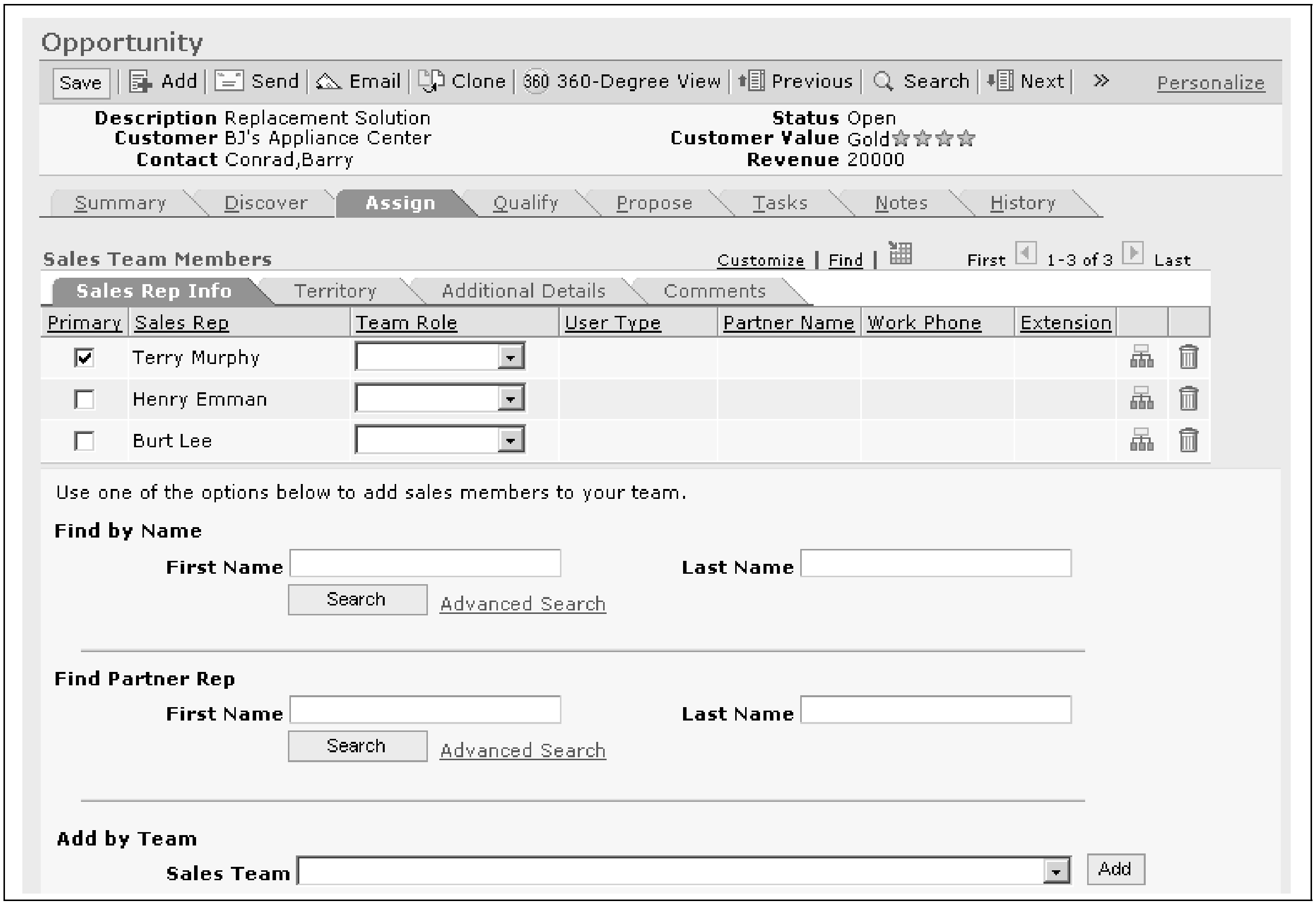
Pages Used to Assign Sales Representatives to a Lead or Opportunity

Page Name	Object Name	Navigation	Usage
Lead - Assign	RSF_LEAD_ASSIGN	Sales, Search Leads Select a lead. Select the Assign tab.	Assign the sales representative to the lead.
Opportunity - Assign	RSF_OPP_ASSIGN	Sales, Search Opportunities Select an opportunity. Select the Assign tab.	Assign the sales representative to the opportunity.
Assign Sales Representative	RSF_ASSIGN_TEAM_L	Access the Lead - Assign page. Click the Assign Sales Rep button. The page appears only if the assignment configuration is set to manual selection.	Manually select sales representatives for the lead and specify the primary lead team representative.
Assign Sales Representative	RSF_ASSIGN_TEAM_O	Access the Opportunity - Assign page. Click the Assign Sales Rep button. The page appears only if the assignment configuration is set to manual selection.	Manually select sales representatives for the opportunity and specify the primary opportunity team representative.
Organization	RSF_TR_HTREE_SEC	Access the Lead - Assign or Opportunity - Assign page, and click the View Sales Organization button.	View the organization or territory to which the representative belongs.

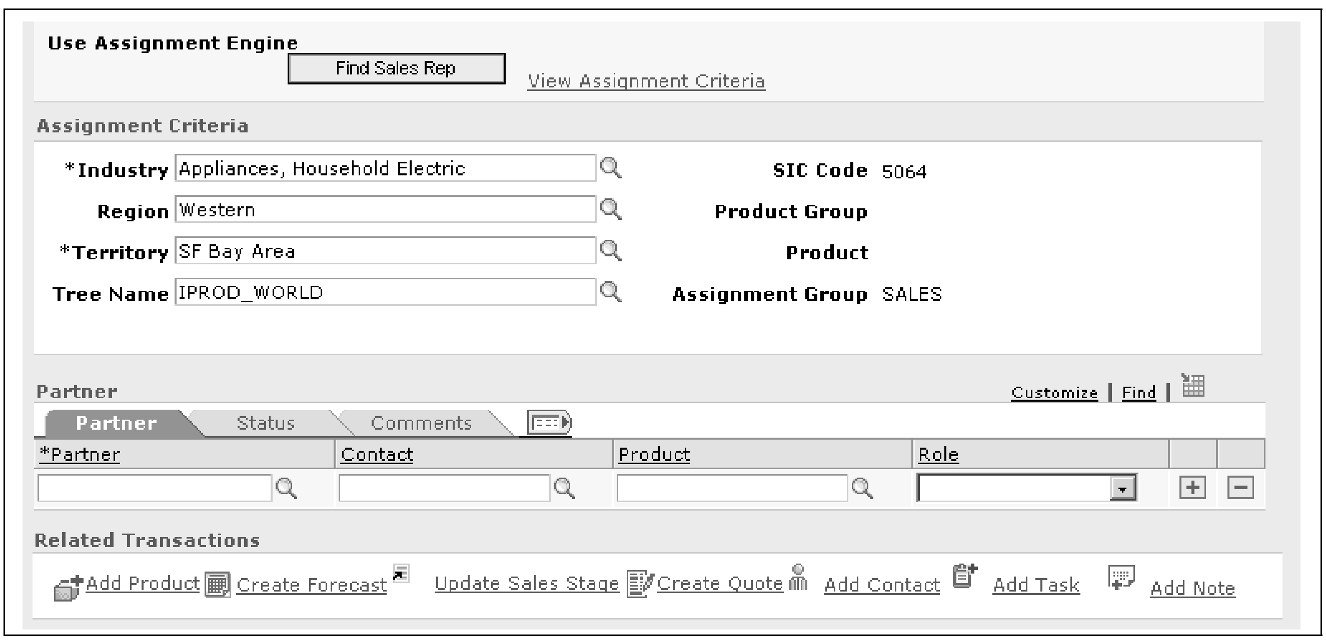
Assigning the Sales Representative

Access the Lead - Assign page or the Opportunity - Assign page.

Note. The Assign page appears in the Lead component and in the Opportunity component. While the example is from the Opportunity component, the information provided applies to both leads and opportunities.



Opportunity - Assign page (1 of 2)



Opportunity - Assign page (2 of 2)

Note. If the lead was converted to an opportunity, fields are unavailable on the Lead - Assign page. Access the Opportunity - Assign page to update the data.

If you do not want to use the assignment engine, you can search for and assign a sales representative to the sales team of the lead or opportunity by using the Find by Name section of the page. Similarly, you can search for and assign a partner representative to the sales team of the lead or opportunity by using the Find Partner Rep (find partner representative) section of the page. Also, you can assign a sales team to the lead or opportunity by using the Add by Team section of the page.

Define sales teams on the Sales Team page.

See Chapter 3, “Setting Up Sales Security and Personalization,” Setting Up Sales Teams, page 22.

Find Sales Rep (find sales representative)

Click to initiate the assignment engine.

If you have set the assignment mode on the assignment group to *Automatic Assignment*, the system finds the best suited sales representative based on the assignment criteria, and enters that sales representative’s data in the Sales Team Members section of the page.

If you have set the assignment mode on the assignment group to *Manual Selection*, the list of sales representatives on the Assign Sales Representative page appears, so that you can select the sales representative to whom to assign the lead or opportunity.

Note. If the lead or opportunity has one existing primary sales representative and the assignment engine returns a new primary sales representative, the system replaces the old primary representative with the new primary representative, and moves the revenue allocation from the old primary representative to the new primary representative.

If the lead or opportunity has multiple existing primary sales representative and the assignment engine returns a new primary sales representative, the system adds the new representative, makes the new representative as primary, and keeps the existing representatives.

View Assignment Criteria

Click to display the assignment criteria on the page. Typically, you do not change the fields in the Assignment Criteria section. However, the system does allow you to edit the Industry, Region, Territory, and Tree Name fields.

Industry

The system populates this field with the industry, if any, associated with the customer on the Discover page.

SIC Code (Standard Industry Code)

Displays the SIC, if any, associated with the industry.

Region

The system populates this field with the region, if any, associated with the customer on the Discover page.

Territory

If you have used the assignment engine to assign a primary sales representative, the system populates this field with the territory associated with the primary sales representative.

Product Group and **Product**

Displays the primary product information from the Product grid on the Propose page.

Tree Name

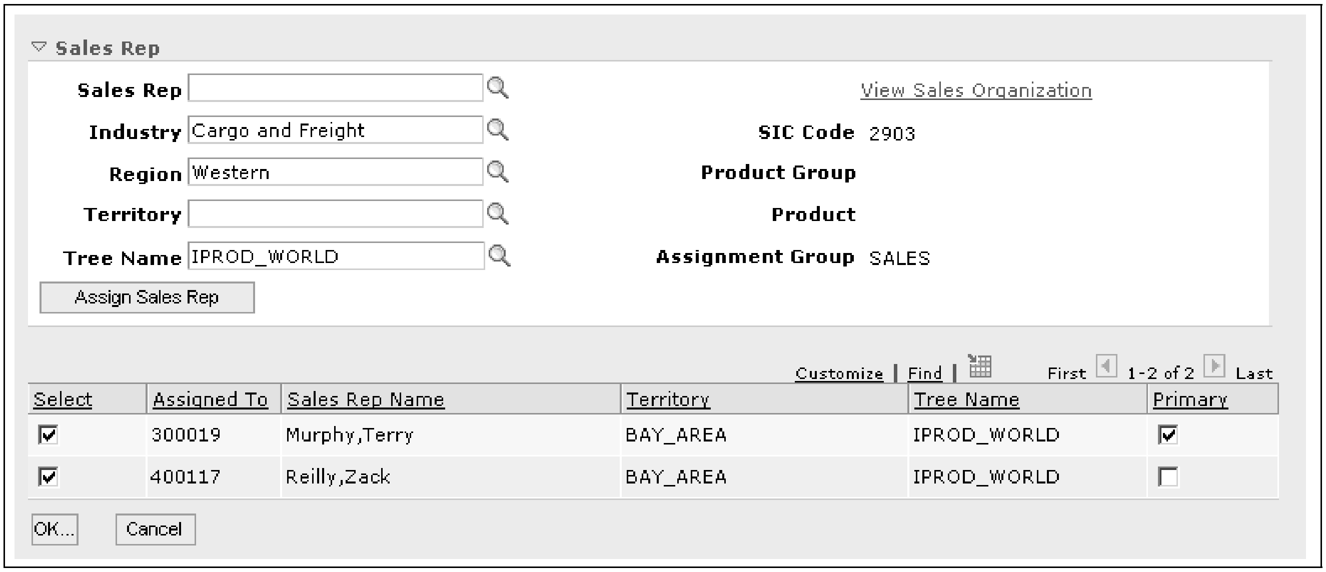
The system populates this field with the default territory tree for the primary sales representative.

Assignment Group

Displays the default assignment group for the business unit.

Selecting Sales Representatives to Assign

Access the Assign Sales Representative page.



Assign Sales Representative page

This page, with the list of candidates for assignment, is available only in manual selection assignment mode. Select the sales representatives and the primary representative for the lead or opportunity.

If you want to choose a sales representative that is not displayed, select a representative in the Sales Rep field and click the Assign Sales Rep button.

Select Select to indicate the sales representatives to whom you want to assign this lead or opportunity.

Primary Select to indicate the primary sales representative for this lead or opportunity. You can have only one primary.

Click OK to access the Assign page, which displays the primary representative's name, territory, and associated industry and region, if any.

Maintaining Data for the Sales Representative Assignment

Access the Lead - Assign page or the Opportunity - Assign page.

Sales Rep Info Tab

Select the Sales Rep Info (sales representative information) tab in the Sales Team Members section.

Primary Select to indicate the primary member of the sales team. You can have only one primary, who should be the sales representative to whom the lead or opportunity is assigned. Only the primary sales representative will be listed on many pages for the lead or opportunity.

Team Role Select the role of the sales representative on this team (for example, *Legal, Partner, Manager, Team Leader,* and so on).

See Chapter 3, “Setting Up Sales Security and Personalization,” Setting Up Sales Teams, page 23.

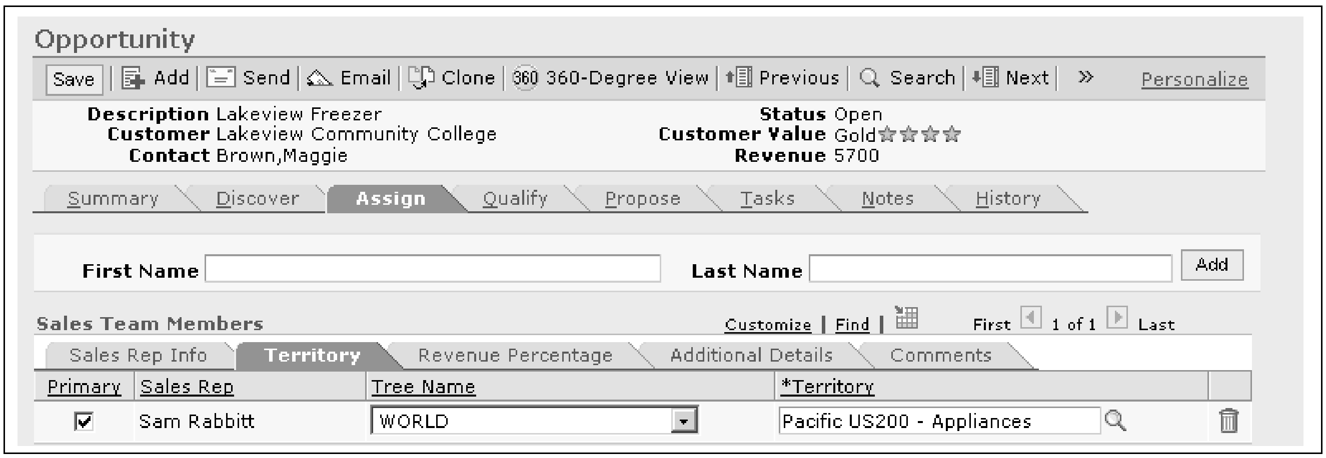
Sales User Type Displays the sales user type associated with the sales representative on the Sales User page.

See Chapter 3, “Setting Up Sales Security and Personalization,” Setting Up Sales Users, page 15.

Click to access the Organization page, where you can view the organization or territory to which the representative belongs.

Territory Tab

Select the Territory tab in the Sales Team Members section.



Opportunity - Assign page: Territory tab

Tree Name After a sales representative is added to the lead or opportunity, the system displays the primary tree for the sales representative as defined on the Sales User page.

Territory After a sales representative is added to the lead or opportunity, the system displays the primary territory for the sales representative as defined on the Sales User page.

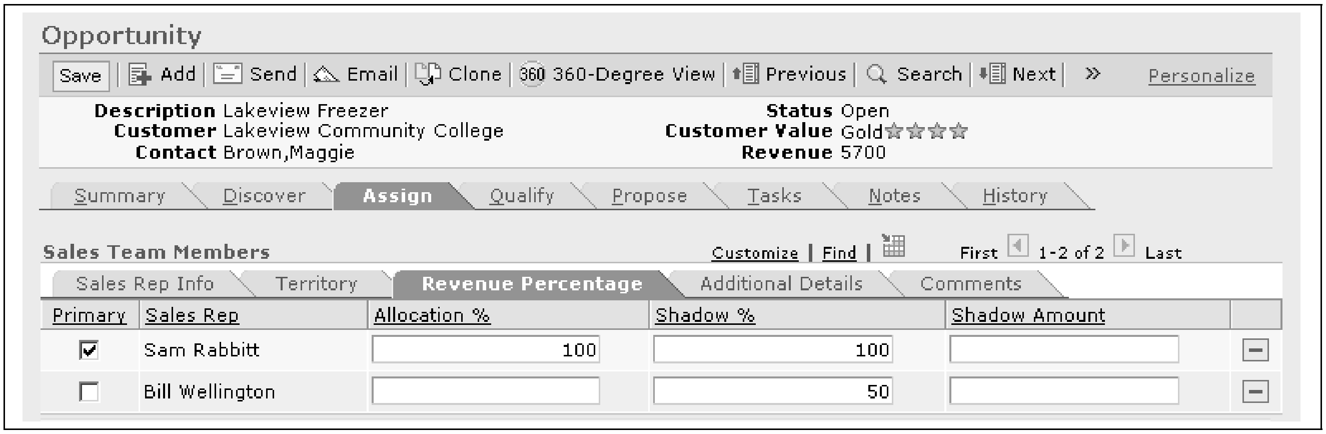
Revenue Percentage Tab (Opportunities Only)

Select the Revenue Percentage tab in the Sales Team Members section of the Opportunity - Assign page. On this tab, you specify how revenues for the opportunity are to be allocated among the sales team. Revenue allocations are required for forecasting and for compensation calculations when you integrate with PeopleSoft Enterprise Incentive Managements (EIM).

See Chapter 20, “Understanding Sales Forecasts,” page 221.

Note. Revenue allocations are required for an opportunity to roll up into pipelines and forecasts. Only opportunities roll up into pipelines and forecasts. You cannot include leads in pipelines and forecasts. Therefore, the Revenue Percentage tab is part of the Opportunity component only. There is no equivalent Revenue Percentage tab for the sales team in the Lead component.

Typically, only sales managers and administrators have access to the Revenue Percentage tab. Access to this page depends on the setting in the user’s sales access profile.



Opportunity - Assign page: Revenue Percentage tab

Allocation % (allocation percentage)
Enter the percentage of the opportunity's revenue that is credited to the sales representative. The sum of the allocation percentages must equal 100 percent.

Shadow %
Enter the percentage of the opportunity's revenue that is credited to the sales representative when calculating performance against quotas. The sum of the allocation percentages does not need to equal 100 percent. You can use this field to give a secondary sales representative partial credit for an opportunity's revenue.

Shadow Amount
Enter a dollar amount that is credited to the sales representative when calculating performance against quotas. The system calculates the total shadow forecast for a sales representative by multiplying the estimated revenue by the shadow percentage, and then adding the shadow amount.

Additional Details Tab

Select the Additional Details tab in the Sales Team Members section.

The system displays additional information about each team member, including company name, country code, and cell phone number. The information comes from the person record or Sales User page. If the team member is a partner, the information comes from the company record. If the team member is a partner contact, the information comes from the contact component.

Comments Tab

Select the Comments tab in the Sales Team Members section.

Enter comments here to further describe a sales team member.

Accepting, Rejecting, or Turning Back a Lead Assignment

You can accept, reject, or turn back a lead that has the status of *New* or *Open.* Lead workflow rules trigger the appropriate email or worklist notifications when a lead is not accepted or rejected within the maximum delay time associated with the lead rating.

This section discusses how to accept, reject, or turn back lead assignments.

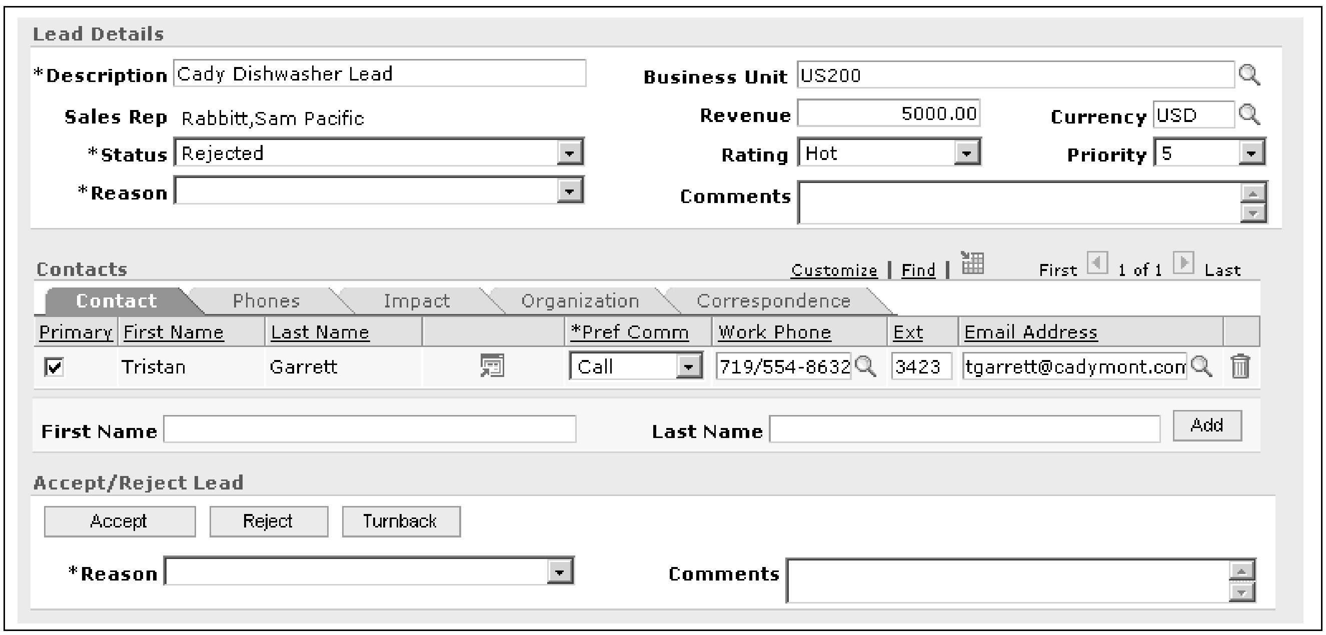
Note. Only the assignment of a lead can be accepted, rejected, or turned back. You cannot accept, reject, or turn back the assignment of an opportunity. Therefore, the Accept/Reject Lead section appears on the Assign page in the Lead component only. There is no equivalent Accept/Reject page in the Opportunity component.

Page Used to Accept, Reject, or Turn Back a Lead Assignment

Page Name	Object Name	Navigation	Usage
Lead - Discover	RSF_LEAD_ENTRY	Sales, Search Leads Select a lead.	Accept, reject, or turn back a lead assignment.

Accepting, Rejecting, or Turning Back Lead Assignments

Access the Accept/Reject Lead section of the Lead - Discover page.



Lead - Discover page

Accept

Click to accept the lead.

The system changes the lead status to *Accepted* and makes the lead available for you to work it, convert it to an opportunity, and close the sale.

You cannot leave an accepted lead unassigned. If the lead is in an unassigned status when it is accepted, the system assigns the lead to the sales user who accepted it. That user may assign the lead to another representative, only if the Manually Reassign Leads option is selected on the user's sales access profile.

Reject

Click to reject the lead.

The rejection/turnback fields appear. Enter a reject reason and, optionally, comments to further describe the situation.

If you are allowed to reassign leads manually (set on the Sales Access Profile page), you may assign the lead to another representative.

Turnback

Click to clear your name from the lead and turn the lead back to the list of active unassigned leads, so that it can be assigned to someone else.

The rejection/turnback fields appear. Enter a turnback reason, and optionally, comments to further describe the situation.

If you are allowed to reassign leads manually (set on the Sales Access Profile page), you may assign the lead to another representative.

Reason and **Comments**

These fields appear when you reject or turn back a lead. Select reasons for not accepting the lead. You may also enter comments to further support your action or describe the situation.

Assigning Partners to a Lead or Opportunity

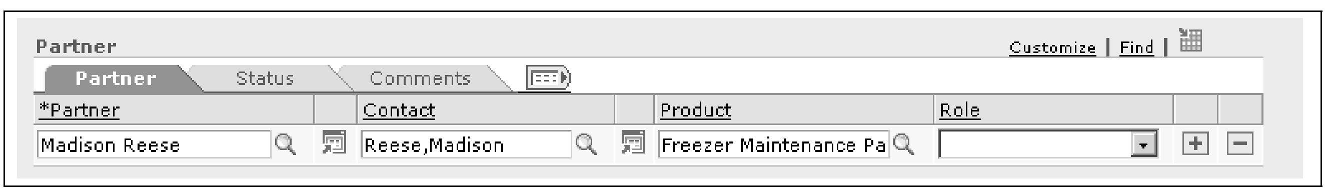
This section discusses how to assign partners to a lead or opportunity.

Pages Used to Assign Partners to a Lead or Opportunity

Page Name	Object Name	Navigation	Usage
Lead - Assign	RSF_LEAD_ASSIGN	Sales, Search Leads Select a lead. Select the Assign tab.	Assign a partner to the lead.
Opportunity - Assign	RSF_OPP_ASSIGN	Sales, Search Opportunities Select an opportunity. Select the Assign tab.	Assign a partner to the opportunity.

Assigning Partners to a Lead or Opportunity

Access the Partner section of the Lead - Assign or Opportunity - Assign page.



Opportunity - Assign page: Partner tab

Partner Tab

Select the Partner tab.

For each partner associated with the lead or opportunity, enter or select the partner's name, contact person's name, product, and contact's role.

To use this page, the role type of *Partner* must be set up, the partner relationship configured, and sales partners and their contacts entered.

See Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up Sales Partners, page 42.

Status Tab

Select the Status tab.

Enter the partner's status *(Current, Former,* or *Out of Business),* type *(Alliance Partners, Channel Partners, Distributor,* or *System Integrator),* and rating *(Excellent, Fair, Good,* or *Poor).*

See Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up Sales Partners, page 42.

Comments Tab

Select the Comments tab.

Enter notes about the partner.

Reassigning a Sales Representative's Leads, Opportunities, and Accounts

You can reassign a sales representative's leads, opportunities, and accounts to another or to several other sales representatives.

This section discusses how to reassign a sales representative's leads, opportunities, and accounts.

When you reorganize a tree, the system automatically reassigns leads, opportunities, and accounts within the new structure. You can generate worksheets to view the automated reassignments and adjust them. This reassignment is discussed in the documentation on tree reorganization.

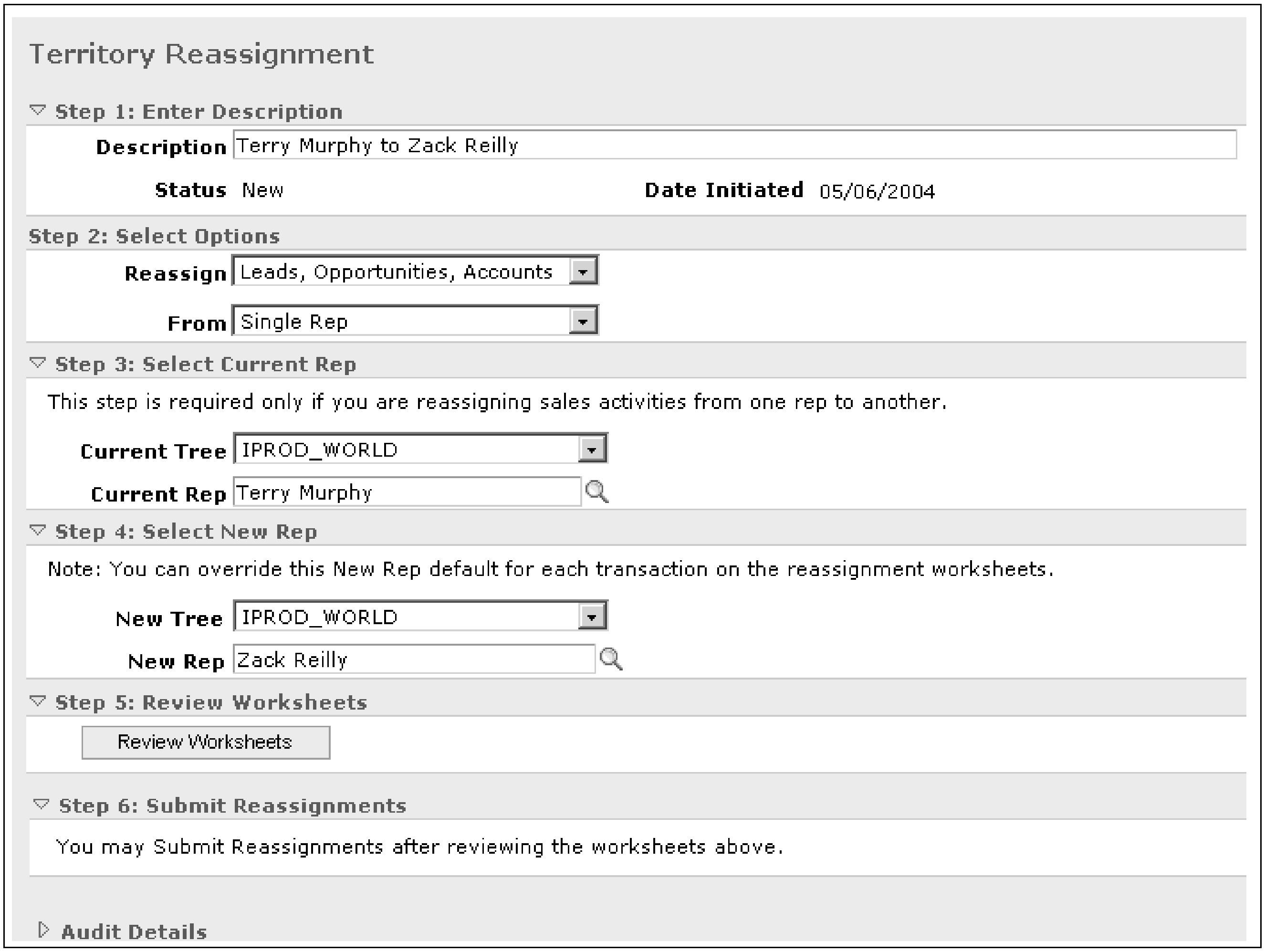
See Chapter 8, "Reorganizing or Deleting a Territory Tree," page 93.

Pages Used to Reassign a Sales Representative's Leads, Opportunities, and Accounts

Page Name	Object Name	Navigation	Usage
Territory Reassignment	RSF_TR_REASSIGN	Sales, Reassign Sales Activities	Reassign all of a sales user's leads and opportunities to another sales representative.
Lead Reassignment Worksheet	RSF_TR_REASS_LEAD	Click the Review Worksheets button.	View how the system would reassign a sales representative's leads and make changes before submitting. You can manually assign the leads to different sales representatives.
Opportunity Reassignment Worksheet	RSF_TR_REASS_OPP	Click Next from the Lead Reassignment Worksheet.	View how the system would reassign a sales representative's opportunities and make changes before submitting. You can manually assign the opportunities to different sales representatives.
Account Reassignment Worksheet	RSF_TR_REA_ACCT	Click Next from the Opportunity Reassignment Worksheet.	View how the system would reassign a sales representative's accounts and make changes before submitting. You can manually assign the accounts to different sales representatives.

Reassigning a Sales Representative's Leads, Opportunities, and Accounts

Access the Territory Reassignment page.



Territory Reassignment page

Follow steps, which are represented by group boxes on the page, to reassign leads and opportunities from one sales representative to another, or to several others. Buttons and links change dynamically as you complete the steps.

STEP 1: Enter Description

Description Enter a description for the reassignment.

Status Displays the current status of the reassignment. Values are: *New, In Progress, Reviewed,* or *Submitted.*

STEP 2: Select Options

Reassign Select one, two, or all of the values: *Leads, Opportunities,* and *Accounts.*

From Select *Single Rep* to reassign leads, opportunities, and accounts for one sales representative. Select *Unassigned* to assign leads, opportunities, and accounts that have not been assigned to a sales representative.

STEP 3: Select Current Rep

Current Tree

Displays the default tree associated with the sales user. If you have access to only one tree, you cannot change this tree. If you have access to multiple trees, you can select a tree using this field.

A sales user cannot make reassignments from one tree to another—only from one territory to another on the same tree.

Current Rep(current representative)

Select the name of the sales representative whose leads, opportunities, and accounts you want to reassign.

STEP 4: Select New Rep

New Tree

Displays the default tree associated with the sales user. If you have access to only one tree, you cannot change this tree. If you have access to multiple trees, you can select a tree using this field.

A sales user cannot make reassignments from one tree to another—only from one territory to another on the same tree.

New Rep (new representative)

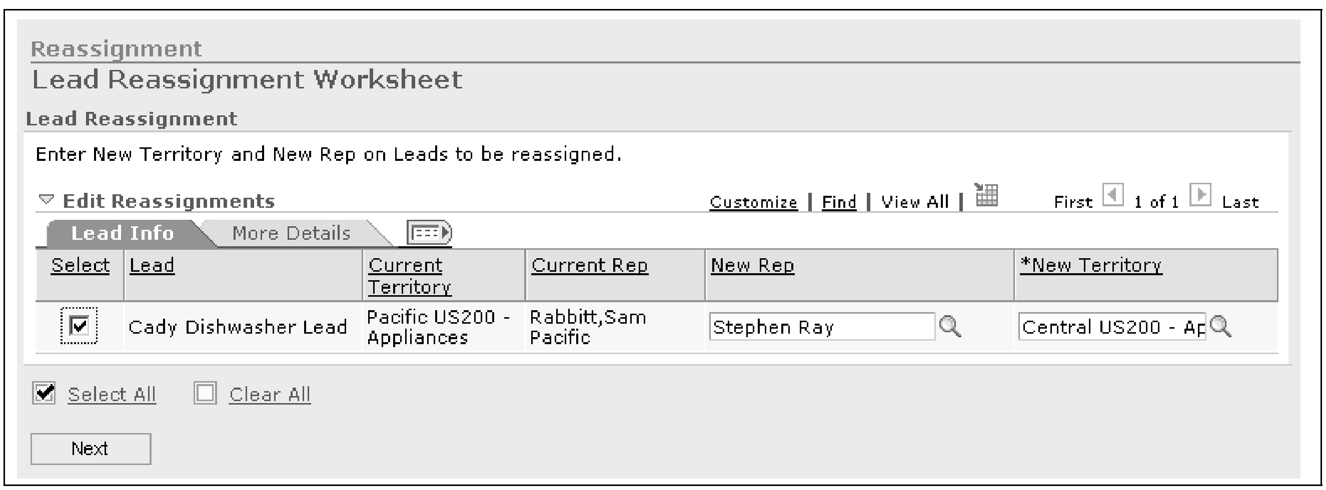
If you want to reassign all of the current representative's leads and opportunities to one sales representative, select that representative here.

If not, then proceed to the next step and view reassignment worksheets, where you can manually assign each lead or opportunity to a different sales representative.

STEP 5: Review Worksheets

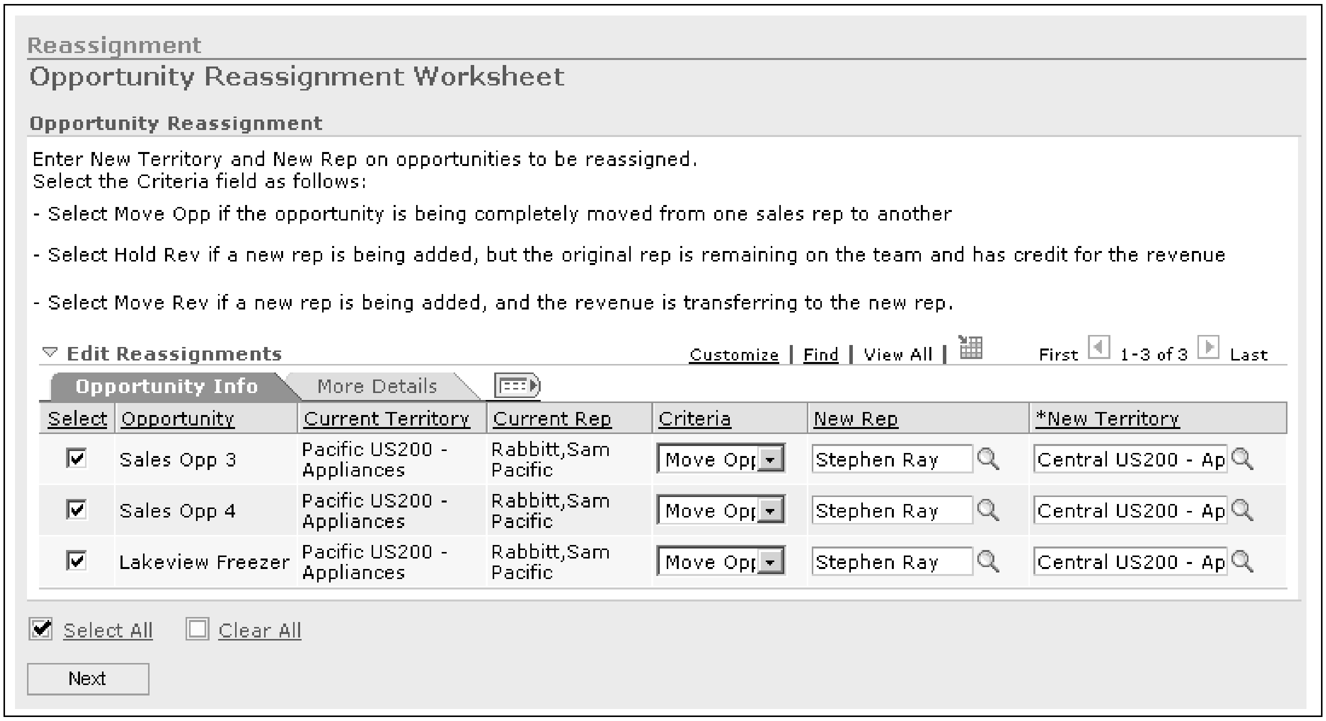
Review Worksheets

Click to access the Lead Reassignment Worksheet page, where you can view information about each lead and assign it to a new representative in the same or a new territory.



Lead Reassignment Worksheet page

After you have completed editing the lead reassignment worksheet, click the Next button to access the Opportunity Reassignment Worksheet page.



Opportunity Reassignment Worksheet page

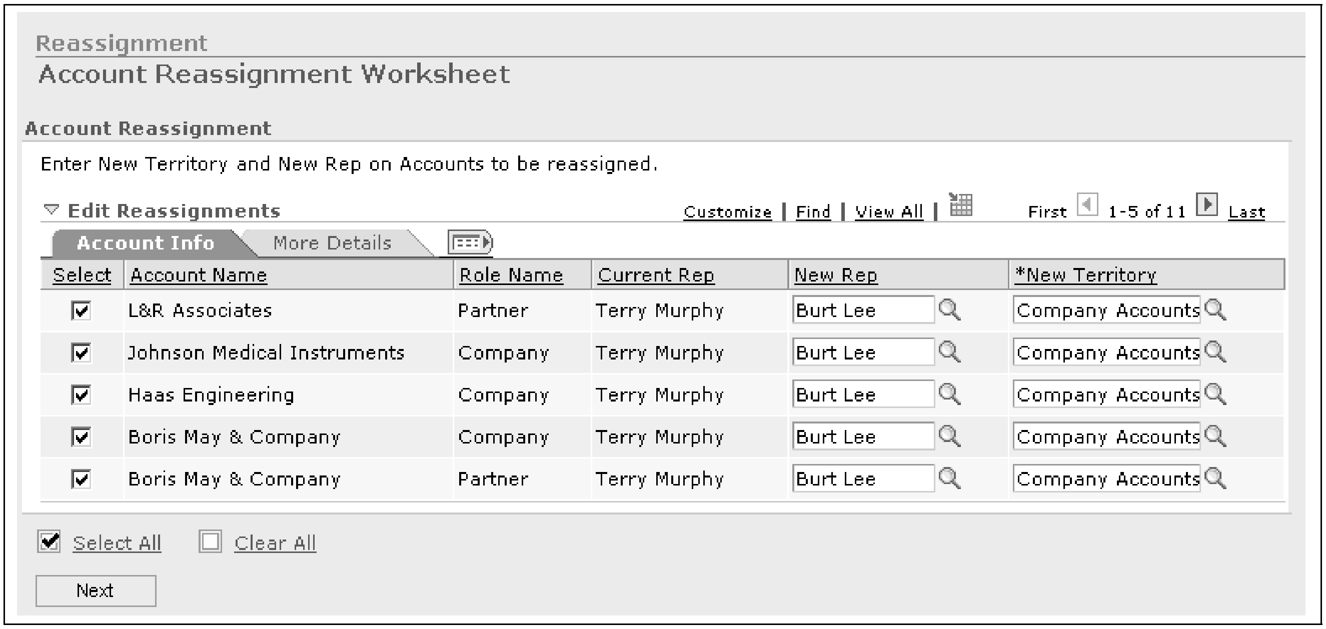
Criteria

Select the way that you want to assign revenue for each opportunity. Values are:

- *Move Opportunity:* Removes the current representative from the opportunity, which moves the entire opportunity, with revenue allocations, from the current representative to the new representative.
- *Hold Revenue:* Adds the new sales representative to the opportunity but holds the revenue credit for the original sales representative.
- *Move Revenue:* Preserves the current representative as a member of the opportunity sales team, but adds the new sales representative as the primary representative for the opportunity. This moves the revenue credit from the original sales representative to the new primary representative.

Next

Click to access the Account Reassignment Worksheet page, when you have completed the opportunity reassignment worksheet.



Account Reassignment Worksheet page

After you have completed the account reassignment worksheet, click the Next button to return to Territory Reassignment page.

STEP 6: Submit Reassignments

Submit Reassignments Click to submit all selected assignments. The system updates the leads and opportunities with the new sales representatives and their territories, and returns you to the Territory Reassignment page.

CHAPTER 13

Qualifying a Lead or Opportunity

This chapter discusses how to:

- Associate a lead or opportunity with a source campaign.
- Run a survey for a lead or opportunity.
- Identify competition for a lead or opportunity.

Associating a Lead or Opportunity with a Source Campaign

This section discusses how to associate a lead or opportunity with a source campaign.

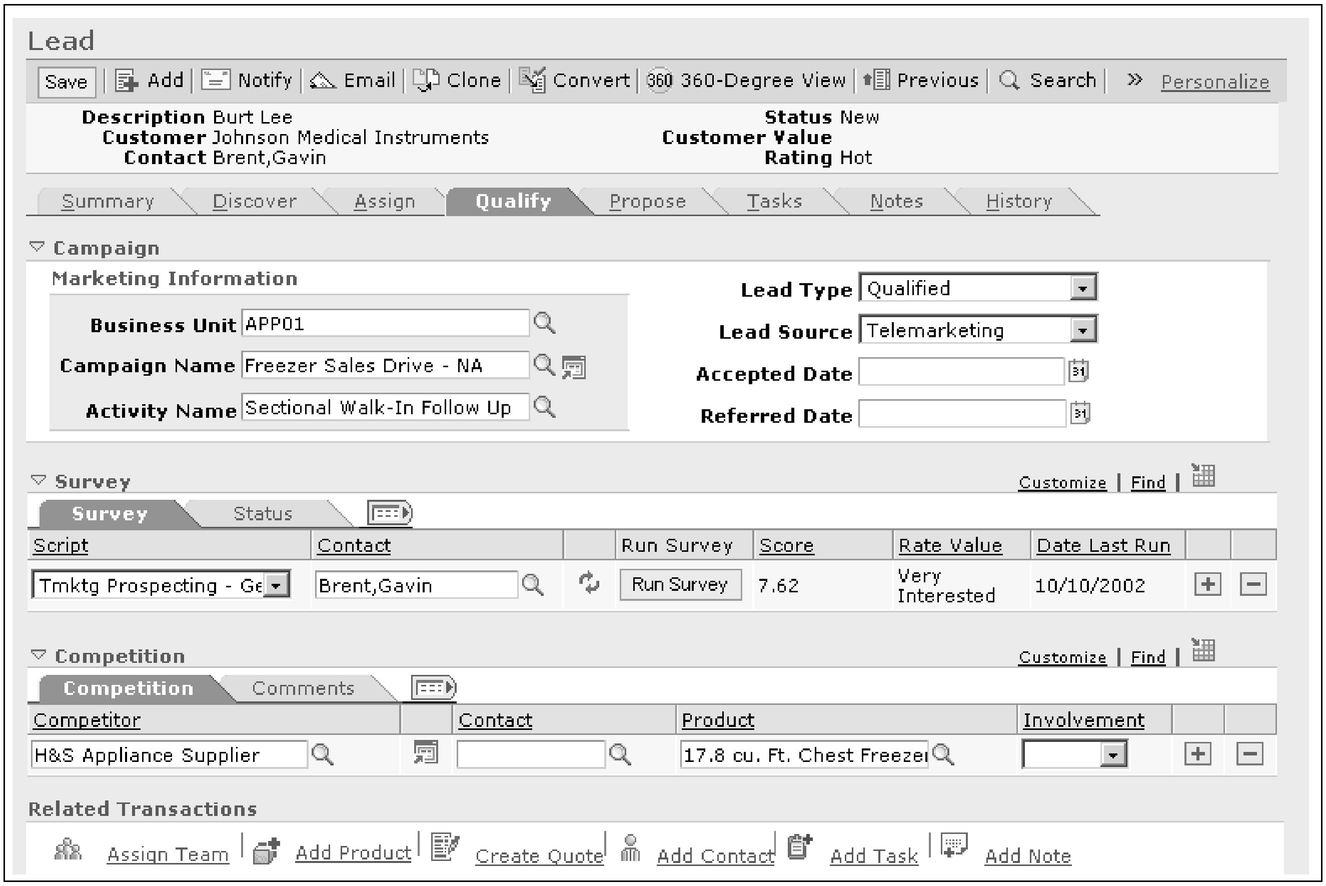
Pages Used to Associate a Lead or Opportunity with a Source Campaign

Page Name	Object Name	Navigation	Usage
Lead - Qualify	RSF_LEAD_QUALIFY	Sales, Search Leads Select a sales lead and select the Qualify tab.	Associate a lead with a source campaign.
Opportunity - Qualify	RSF_OPP_QUALIFY	Sales, Search Opportunities Select a sales opportunity and select the Qualify tab.	Associate an opportunity with a source campaign.

Associating a Lead or Opportunity with a Source Campaign

Access the Lead - Qualify page or Opportunity - Qualify page.

Note. The Campaign section appears on the Qualify page in both the Lead component and the Opportunity component. Although the following example shows the Lead component, the information here applies to both leads and opportunities.



Lead - Qualify page

If the lead or opportunity originates from a PeopleSoft Marketing or Telemarketing campaign, the system populates the Lead Source field and displays information that is relevant to that campaign here, including the marketing business unit, campaign name, and wave name. If the lead or opportunity does not originate from a campaign, these fields are blank. If a PeopleSoft Sales user creates the lead, the system enters the lead source of *Sales.*

You can override these values. If you enter a marketing business unit, campaign name, or wave name, you must also enter the other two items.

Note. If PeopleSoft FieldService and CRM for High Technology are integrated with the system, the system generates sales leads for agreements that are expired (or about to expire) according to the user-defined time period. The system creates a sales lead with the source of *Agreement* for every agreement that is eligible for the process.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Setting Up and Managing Agreements and Warranties,” Generating Sales Leads for Agreement Renewal.

Business Unit	Enter the business unit that incurs the cost of the campaign.
Campaign Name	Enter the campaign from which the lead or opportunity originates. When you specify a business unit, the system populates this field with the campaigns from that business unit.
Activity Name	Enter the activity from which the lead or opportunity originated. When you specify a campaign, the system populates this field with the activities from that campaign only.

Lead Type

Select a type to indicate the nature of the lead. Possible values are *Inquiry, Lead, Qualified, Turnback Qualified,* and *Turnback.* These lead types are translate values that are delivered with the system. Except for *Qualified,* which is required to transfer leads from PeopleSoft Telemarketing or other PeopleSoft products, you can modify these or define additional values.

Lead Source

Select the source from which the lead originated. Possible values are *Sales, Marketing, Telemarketing, Online Marketing,* and *High Technology Agreement.* If a PeopleSoft Sales user creates the lead, the source is *Sales.*

Lead sources are predefined in the system. You can modify the descriptions on the Lead Source setup page. You can define additional values also, but do not delete the predefined ones. These are required for transferring leads between integrated system applications.

See Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up Lead Sources, page 50.

Note. When you clone a lead, the system sets the lead source to *Sales* for the newly created lead. However, the new lead continues to be tracked with the campaign and wave of the original lead.

Accepted Date

Enter the date when the sales representative accepts the lead.

When you change the lead status to *Accepted* on any page, the system changes the status here and sets the accepted date to the system's current date.

Referred Date

Enter the date when you receive the prospect information (for example, from a trade show).

When you change the lead status to *Referred* on any page, the system changes the status here and sets the referred date to the system's current date.

Running a Survey for a Lead or Opportunity

This section discusses how to:

- Select a survey script.
- Administer a survey script.

Pages Used to Survey a Lead or Opportunity

Page Name	Object Name	Navigation	Usage
Lead - Qualify	RSF_LEAD_QUALIFY	Sales, Search Leads Select a sales lead and select the Qualify tab.	Select the survey script for the lead.
Opportunity - Qualify	RSF_OPP_QUALIFY	Sales, Search Leads Select a sales opportunity and select the Qualify tab.	Select the survey script for the opportunity.
Execute Script	RC_BS_EXECUTE_MAIN	Access the Survey section of the Lead - Qualify page or Opportunity - Qualify page. Select the survey to administer and click the Run Survey button.	Use scripted questions to identify the customer's interests and to qualify the lead or opportunity.
Add Script Comment	RC_BS_COMMENT	Click the View Script Comments link on the Execute Script page.	View comments, add script comments, or delete question comments.

Identifying a Branch Script Survey

Access the Lead - Qualify page or Opportunity - Qualify page.

Note. The Qualify page appears in the both the Leads component and the Opportunities component. Although the following example shows the Leads component, the information here applies to both leads and opportunities.

If the lead is transferred from PeopleSoft Marketing or Telemarketing where a survey is run, information that is relevant to that survey appears here. You can run additional surveys.

Script Displays the list of scripted questions.

Contact Displays the name of the contact to whom the questions are asked.

You can click Refresh to update the search list with the contacts for this lead and select the appropriate contact from that list.

Run Survey Click to access the Execute Script page, where the system leads you through scripted questions and assigns a score and rating to the prospect based on the contact's answers that you enter.

Note. After you run a survey, you cannot delete it from this page.

See Chapter 13, "Qualifying a Lead or Opportunity," Administering a Survey Script, page 165.

Score Displays the score from the Execute Script page. As you enter a customer's answer to each scripted question, the system determines a score that is based on values set within that script. When you are finished administering the script, the system adds those scores and displays the total here.

See Chapter 13, "Qualifying a Lead or Opportunity," Administering a Survey Script, page 165.

Rate Value

Displays the rate value from the Execute Script page. Rate values are based on the total script scores. Examples include *Cold, Warm, Hot, Satisfied, Somewhat Satisfied,* and *Very Satisfied.*

If a rate value from the survey is not mapped to a lead rating, the user can interpret it and manually set the lead rating to the appropriate value. For example, you might map survey rate values to leading ratings such that only leads with a survey rate of either *Warm* or *Hot* are given a status of *Qualified.* When the survey rate value of a lead is *Very Satisfied,* the user can manually change the lead rating to *Hot* to give it the status of *Qualified.*

Date Last Run

Displays the date when the script was last run.

Script Status

Displays the current status of the script with this contact. Values are *Completed, Processing,* and *Started.*

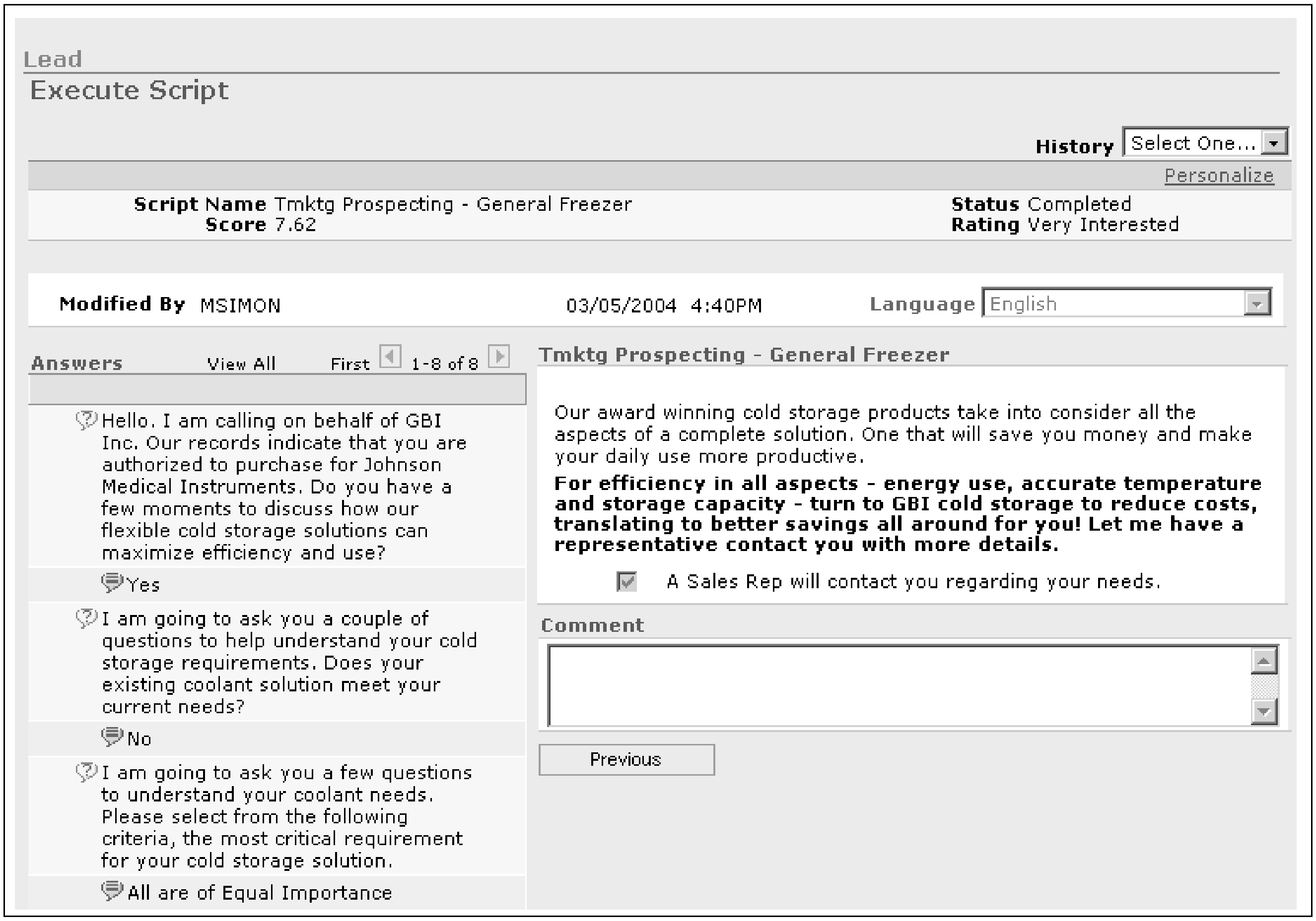
Delete

You can delete a script row before running the script. However, you cannot delete the script or its results after it has been run.

Administering a Survey Script

Access the Execute Script page.

Note. The Execute Script page is part of both the Leads component and the Opportunities component. Although the following example shows the Leads component, the information applies to both leads and opportunities.



Execute Script page

Ask the scripted question, select the contact's response to the question, enter any relevant comment, and then ask the next question. If the contact provides an answer that no longer promotes the sale of the product, the system displays the message *Thank you for your time* and ends the survey.

You can also enter and view script comments.

See Chapter 13, "Qualifying a Lead or Opportunity," Administering a Survey Script, page 165.

Identifying Competition for a Lead or Opportunity

This section discusses how to identify competition for a lead or opportunity.

Page Used to Identify Competition for a Lead or Opportunity

Page Name	Object Name	Navigation	Usage
Lead - Qualify	RSF_LEAD_QUALIFY	Sales, Search Leads Select a sales lead and select the Qualify tab.	Identify the potential competitors for this lead.
Opportunity - Qualify	RSF_OPP_QUALIFY	Sales, Search Opportunities Select a sales opportunity and select the Qualify tab.	Identify the potential competitors for this opportunity.

Identifying Competition for a Lead or Opportunity

Access the Lead - Qualify page or Opportunity - Qualify page.

Note. The Competition section appears on the Qualify page in both the Leads component and the Opportunities component. The following information applies to both leads and opportunities.

Competition

Enter the competitor's name, contact name, and product, and select the involvement: *Equal*, *Strong*, or *Weak*. Set up competitors in the Customers CRM menu.

To select a company as a competitor, you must set up the role type of *Competitor*, and set up companies and their contacts with a role type of *Competitor*.

See Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up Sales Competitors, page 45.

Comments

Select the Comments tab.

Enter notes to describe a competitor's pricing, product or offering.

CHAPTER 14

Creating a Proposal for a Lead or Opportunity

This chapter provides an overview of proposals for a lead or opportunity, and discusses how to:

- Select products and prices for the proposal.
- Generate quotes and orders.

Understanding Proposals for a Lead or Opportunity

After you have generated and qualified a lead or opportunity, you may want to create a proposal and send it to the potential customer. On the Propose page of the Lead or Opportunity component, you can add the specific products, quantities and prices that you want to include on the proposal. If you have licensed PeopleSoft Order Capture, you can create a quote which includes the information you have entered on the Propose page. Then, you can put together a package of information to email to the potential customer. If the lead or opportunity becomes an actual sale and you have licensed PeopleSoft Order Capture, you can create an order from the information you have entered on the Propose page.

See Chapter 17, "Sending Sales Emails and Correspondence," Sending a Proposal or Quote to a Customer, page 195.

Selecting Products and Prices for the Proposal

This section discusses how to select products and prices for the proposal.

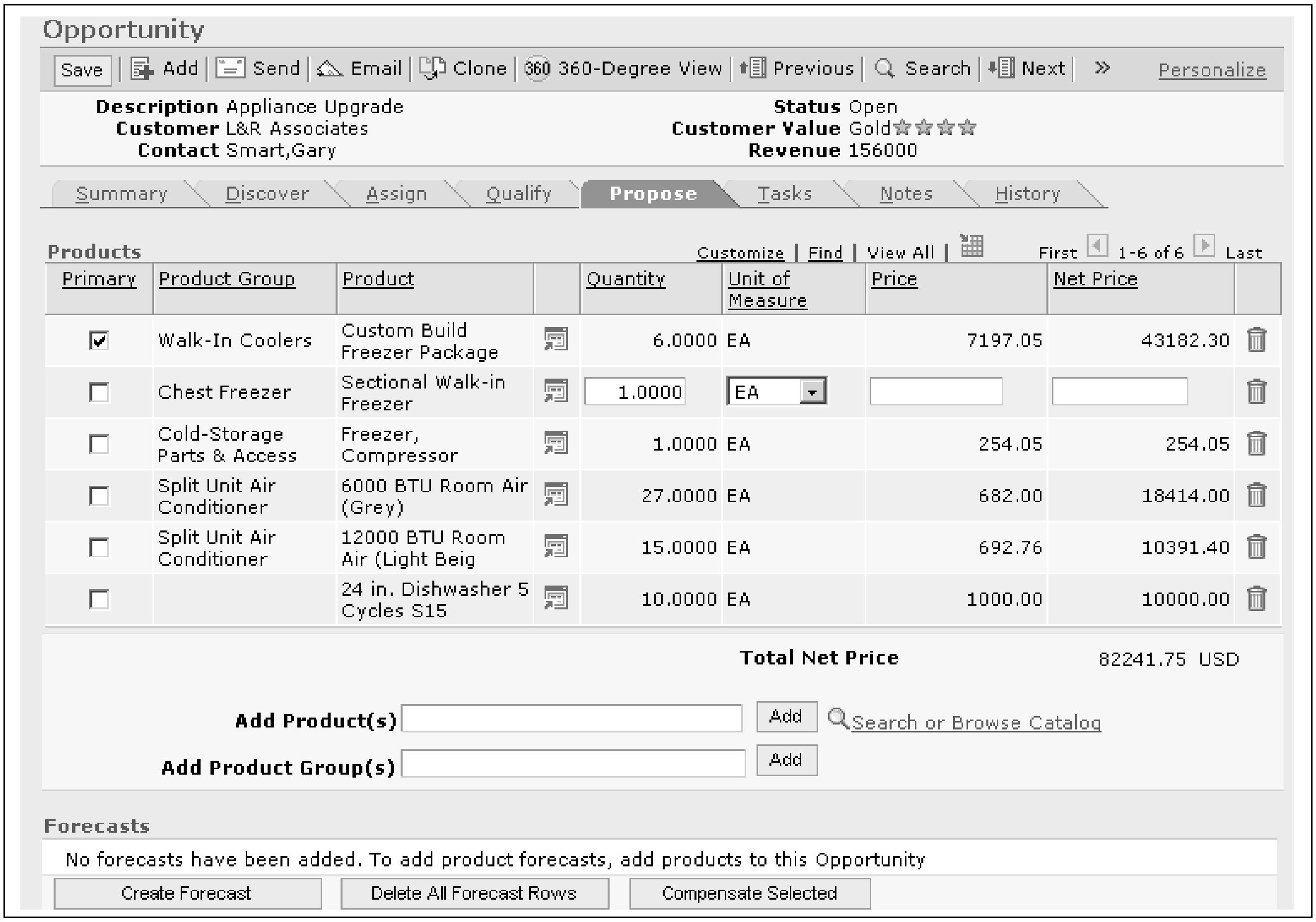
Pages Used to Select Products and Prices for the Proposal

Page Name	Object Name	Navigation	Usage
Lead - Propose	RSF_LEAD_PROPOSE	Sales, Search Leads Select a lead and click the Propose tab.	Select products and prices for the proposal for the lead.
Opportunity - Propose	RSF_OPP_PROPOSE	Sales, Search Opportunities. Select an opportunity and click the Propose tab.	Select products and prices for the proposal for the opportunity.

Selecting Products and Prices for the Proposal

Access the Lead - Propose page or Opportunity - Propose page.

Note. The Products section appears on the Propose page in both the Lead component and the Opportunity component. Although this screen shot is from the Opportunity component, the information applies to leads and opportunities unless otherwise indicated.



Opportunity - Propose page

Primary	Select to identify a product as the customer's primary interest.
Product Group	Displays the product group. If you add a product and there is a product group associated with the product, the system populates the Product Groupfield.
Product	If you add a product using the Add Product(s) field and the Add button, this field displays the product that you added. If you add a product group using the Add Product Group(s) field and the Add button, this field become editable and you can search for a product that is associated with the product group entered.
Price	Displays the price of each unit. Overriding the price here applies a price override to the opportunity or lead only. When you enter a product, the system displays the product's unit of measure or default unit of measure. The system also displays the product's list price based on the combination of the product ID, currency code, and unit of measure. If you override the unit of measure and there is a price for the new unit that you enter, the system displays that price when you refresh the page.

Net Price	Displays the price multiplied by the quantity. When you tab out of this field, the system calculates and displays the new subtotal.
Add Product(s) and **Add**	Enter a product and click Add to add the product to the list. You can also leave the text field blank and click Add to select a product from a list.
Add Product Group(s) and **Add**	Enter a product group and click Add to add the product group to the list. You can also leave the text field blank and click Add to select a product group from a list.
Search or Browse Catalogs	Click to access the online catalog to determine details about a product and browse the catalog. **Note.** If you have licensed PeopleSoft Order Capture, you can browse the catalog.

Generating Quotes and Orders

This section discusses how to generate quotes and orders.

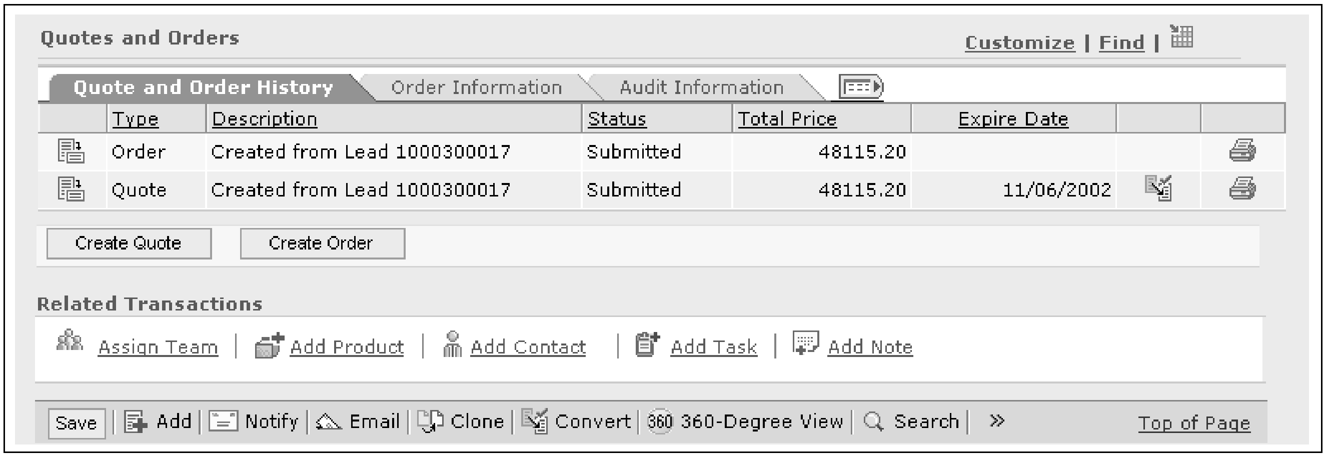
Pages Used to Generate Quotes and Orders

Page Name	Object Name	Navigation	Usage
Lead - Propose	RSF_LEAD_PROPOSE	Sales, Search Leads. Select a lead and then click the Propose tab.	Generate quotes and orders for a lead.
Opportunity - Propose	RSF_OPP_PROPOSE	Sales, Search Opportunities. Select an opportunity and then click the Propose tab.	Generate quotes and orders for an opportunity.

Generating Quotes and Orders

Access the Lead - Propose page or Opportunity - Propose page.

Note. The Quotes and Orders section appears on the Propose page in both the Lead and Opportunity components. Although this screen shot is from the Lead component, the information applies to leads and opportunities.



Lead - Propose page

Create Quote and **Create Order**

Click to create a quote or order with the products displayed in the products grid. The system transfers the user to the PeopleSoft Order Capture quote or order component.

If the lead or opportunity is associated with a marketing campaign and the product selected is in that campaign's marketing offer, the system copies the promotion code to the PeopleSoft Order Capture pages for that product.

These buttons are available only if you are licensed and integrated with PeopleSoft Order Capture.

Note. You must designate a third-party tax vendor (such as Taxware, Vertex, or WorldTax) on the Order Capture Business Unit Definition page for taxes to be calculated as part of the quote or order. If you don't specify a tax vendor, no tax calculations are included.

See *PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook*, "Defining PeopleSoft Order Capture Business Units".

Quote and Order History

This tab shows the status, total price, and expire date of the requests for quotes and orders that are submitted from the Products section of the Propose page.

Click the View Quote Details button to access the Quote component to review or edit this quote's details.

Click the Create Sales Order button to create a sales order from a quote. You can only use this button if the Expire Date for the quote is later than the current date.

Click the Print button to access the Correspondence Request page, where you can compose and send an email containing a quote to a customer.

See Chapter 17, "Sending Sales Emails and Correspondence," Sending a Proposal or Quote to a Customer, page 195.

Order Information

Select the Order information tab.

View the order ID and quote ID.

Audit

Select the Audit tab.

Review this information to determine when and by whom quotes and orders were created or modified.

CHAPTER 15

Creating Sales Tasks and Adding Notes for a Lead or Opportunity

This chapter provides an overview of sales tasks and discusses how to:

- Create and assign sales tasks.
- View and manage tasks.
- Add notes and attachments.

Understanding Sales Tasks

A task is an day-to-day activity such as a meeting or a conference call that you put on your calendar. You can use tasks in many PeopleSoft CRM applications.

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

A sales task is an day-to-day activity associated with managing a lead or an opportunity. Sales tasks might include making a sales call, attending meetings, or following up on prospects. You can use functionality in the Lead and Opportunity components to manage sales tasks.

Creating and Assigning Sales Tasks

This section discusses how to create and assign sales tasks.

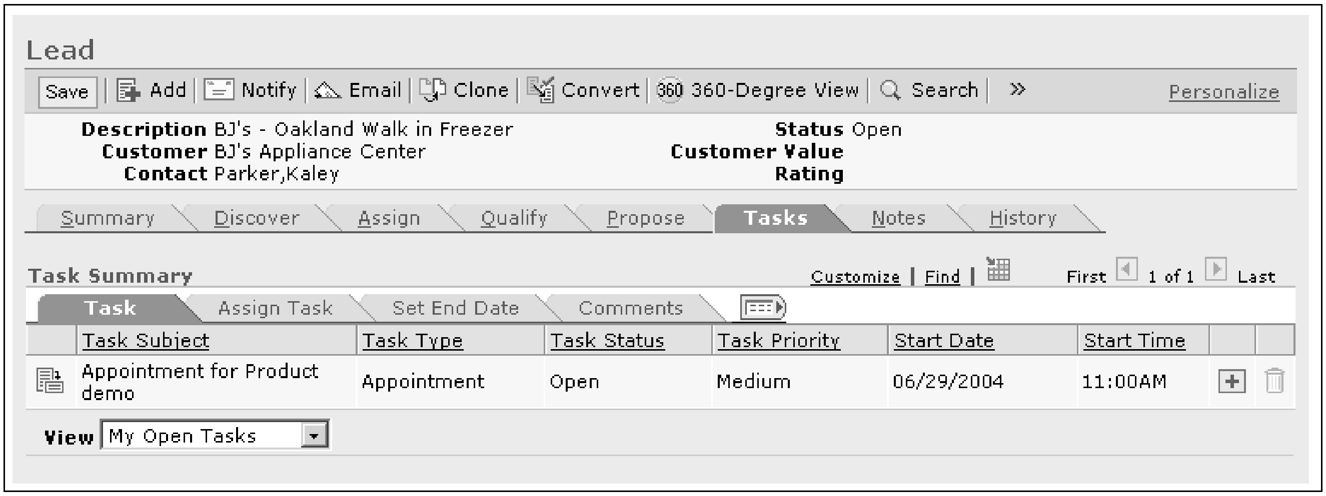
Pages Used to Create and Assign Sales Tasks

Page Name	Object Name	Navigation	Usage
Lead - Tasks	RB_TSK_EDIT_GRID	Sales, Search Leads. Select a lead. Select the Tasks tab.	Create and track the sales tasks to follow up on a lead, close the sale, or convert the lead to an opportunity.
Opportunity - Tasks	RB_TSK_EDIT_GRID	Sales, Search Opportunities. Select an opportunity. Select the Tasks tab.	Create and track the sales tasks that are required to follow up on an opportunity and close the sale.

Creating and Assigning Sales Tasks

Access the Lead - Tasks page or the Opportunity - Tasks page.

Note. The Tasks page appears in both the Lead and Opportunity components. While this screen shot is from the Lead component, the information applies to leads and opportunities unless otherwise indicated.



Lead - Tasks page: Task tab

Identify each task that is required to work the lead or opportunity and close the sale. When you identify tasks and save the page, the system saves the task to the calendar and to the tasks list.

Click the Task Details button to access the Task Details page to enter or view detailed information for the task.

Task Subject

Displays a description of the task.

Task Type

Displays a task type. Set up task types on the Tasks Type page under the Common Definitions, Task Management menu.

Task Status

Displays the status of this task. Values are *Cancelled, Completed, In Process,* and *Open.*

Task Priority

Displays a priority for the task. Values are *High, Medium,* and *Low.*

Start Date

Displays a start date for the task.

Start Time

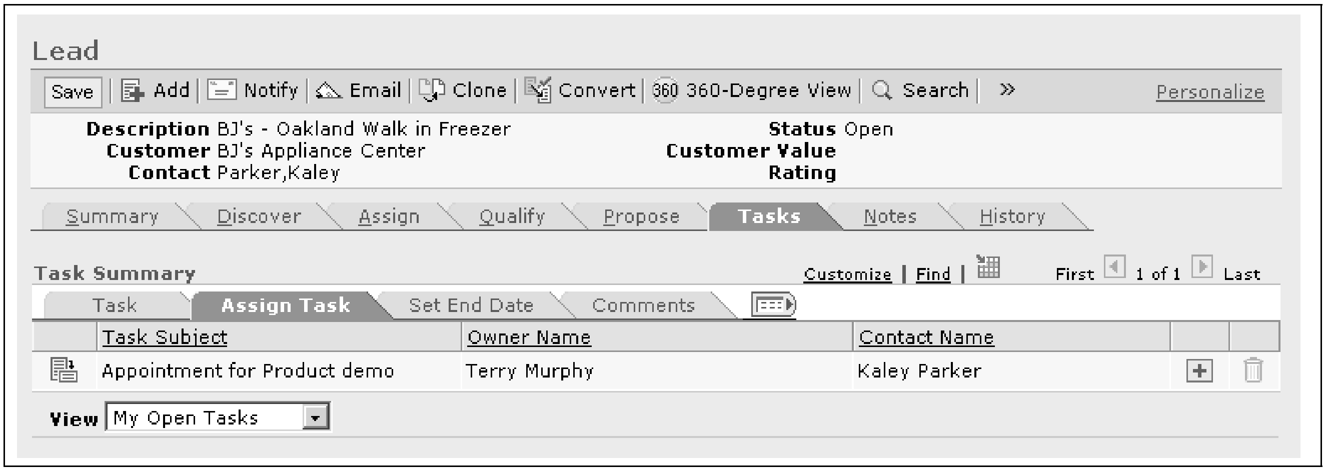
Displays a start time for the task.

View

Select the tasks *(All My Tasks, My Closed Tasks,* or *My Open Tasks)* that you want to view in the Task Summary section. The default is *My Open Tasks.*

Assign Task

Select the Assign Task grid tab.



Lead - Tasks page: Assign Task tab

Task Subject Displays a description of the task.

Owner Name Displays the user to whom the task is assigned.

Contact Name Displays the name of the contact person for the task.

Set End Date

Select the Set End Date tab.

End Date and **End Time** Displays the date and time when you complete the task.

Comments

Displays comments to further describe the task.

Managing and Viewing Tasks

This section discusses how to:

- Manage and view tasks.
- Associate a task with a lead or opportunity.

Pages Used to Manage and View Tasks

Page Name	Object Name	Navigation	Usage
Task Details	RB_TSK	• Sales, Search Leads or Sales, Search Opportunities. Select a lead or opportunity. Select the Tasks tab, and then click  beside the task that you want to view or edit. • Click the Add Calendar Entry button from the My Calendar component. • Click the Add Task button from the My Tasks page.	View task details.
Transactions for the Task	RB_TSK_TXNS	From the Task Details page, click the View or Link Transactions link.	Associate a task with a lead or opportunity.
My Tasks	RB_TSK_MY_TASKS	My Tasks	Manage and view tasks.
Monthly Calendar	RB_TSK_CALENDAR	My Calendar	View tasks in calendar format.

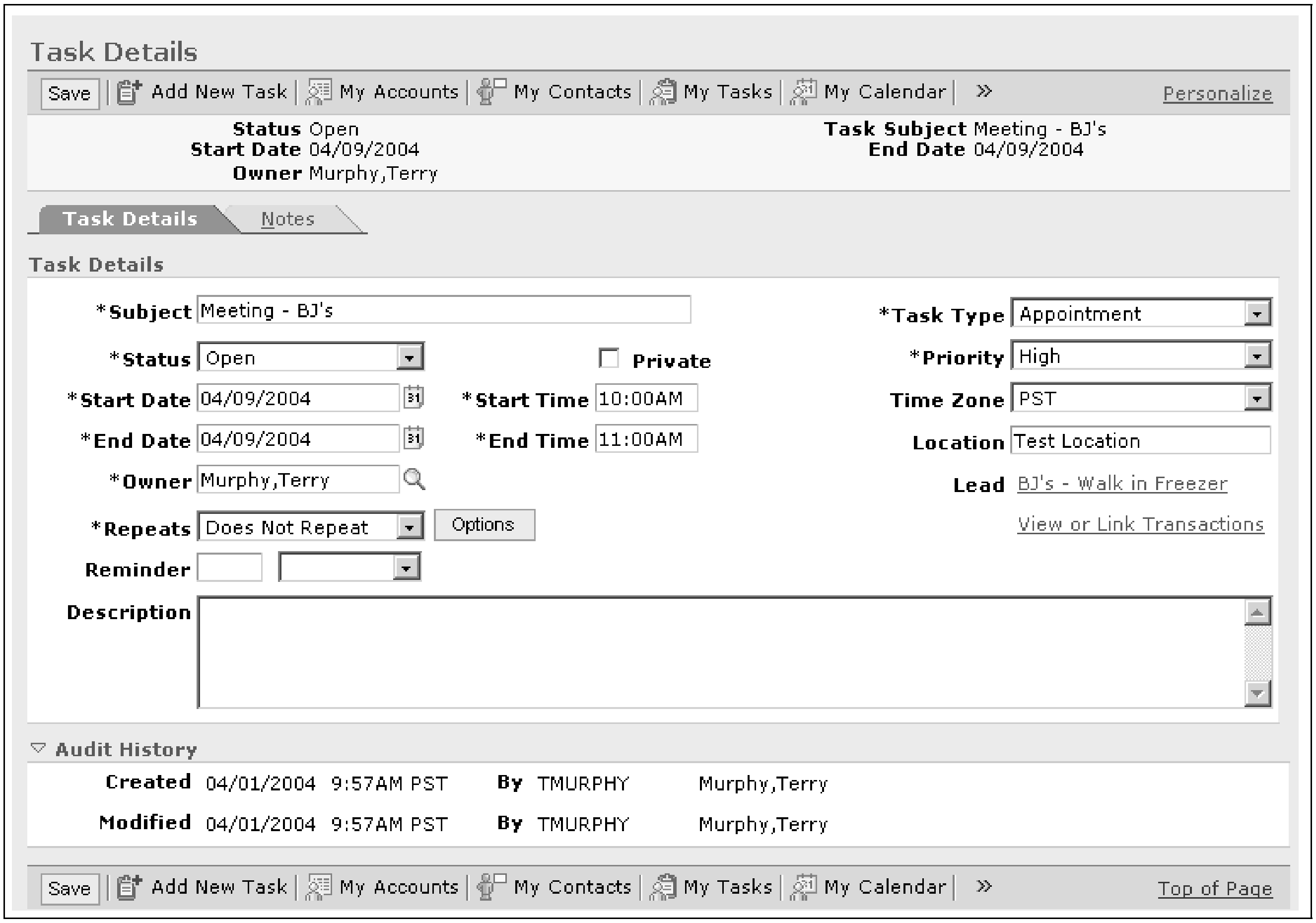
Managing and Viewing Tasks

You can view tasks several ways. You can:

- View tasks for the specific lead or opportunity on the Lead - Tasks page or Opportunity - Tasks page.
- Click the Task Detail icon that is next to a task on the Lead - Tasks page or Opportunity - Tasks page to access the Task Detail page, where you can view or edit details for that task.
- View the calendar to determine which tasks are due to begin on which dates, and click any task to access its relevant Tasks page.

  See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Using Calendars”.
- Use the My Tasks page to view lists of tasks.

Note. When you enter and save a task on the Lead - Tasks page or Opportunities - Tasks page, the system associates the task with a lead or opportunity, and writes that task to the calendar if applicable for the task type selected for the task. However, when you enter a task directly in the My Calendar or My Tasks components, the system does not associate it with a lead or opportunity. You must use the View or Link Transactions link from the Task Details page to associate the task with a lead or opportunity.



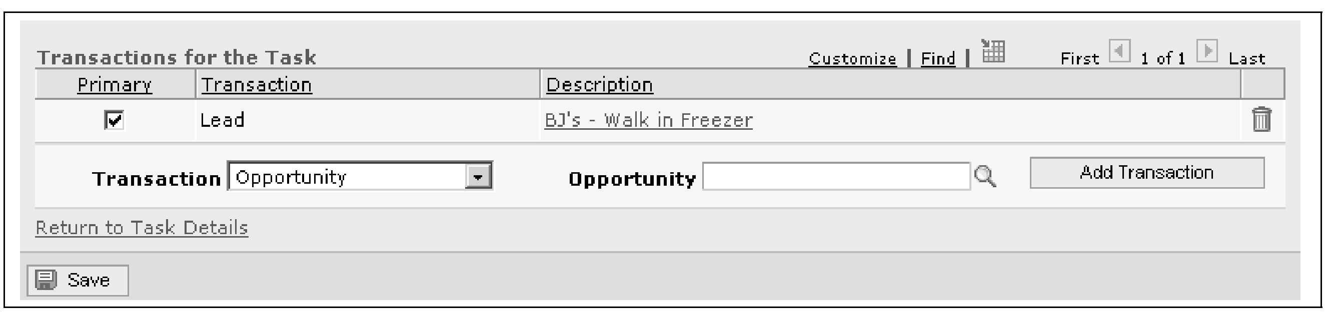
Task Details page

Lead and Opportunity The systems displays a link to the lead or opportunity to which the task is associated. Click the link to view the lead or opportunity.

View or Link Transactions Click this link to access the Transactions for the Task page, where you can associate the task with a lead or opportunity.

Associating a Lead or Opportunity With a Task

Access the Transactions for the Task page.



Transactions for the Task page

Primary Select this check box to indicate the primary transaction to which the task belongs. A task can be associated with multiple transactions.

	When this situation exists, one of the transaction must be marked as the primary transaction to which the task belongs.
Transaction	Select *Lead* or *Opportunity* to link the task with a lead or opportunity.
Lead or Opportunity	The system displays one of these fields after you make a selection in the Transaction field. Select a lead or opportunity with which the task is associated.
Add Transaction	Click this button to associate the task with the lead or opportunity that you select.

Adding Notes and Attachments

This section discusses how to enter and view notes and attachments.

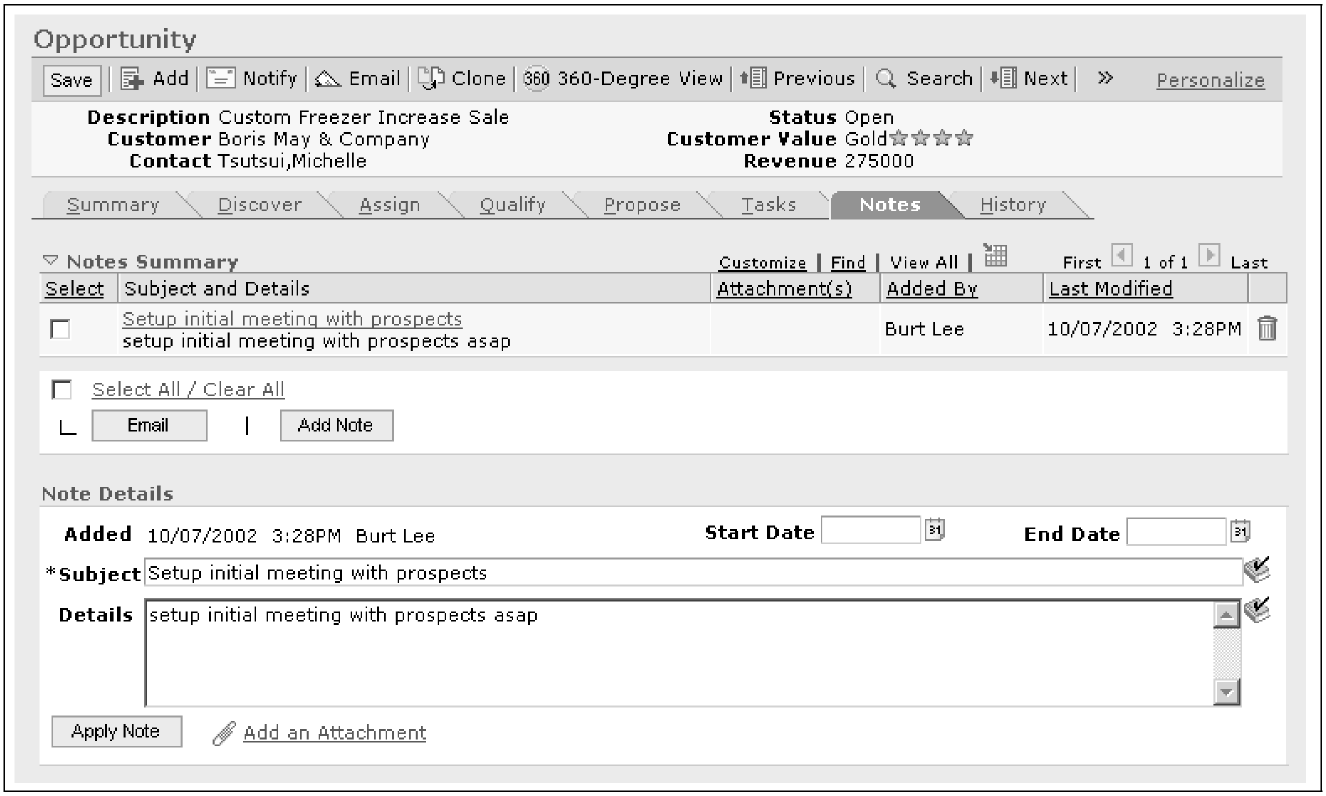
Pages Used to Add Notes and Attachments

Page Name	Object Name	Navigation	Usage
Lead - Notes	RSF_LEAD_NOTES	Sales, Search Leads Select a lead. Select the Notes tab.	Enter notes and attachments about the lead.
Opportunity - Notes	RSF_OPP_NOTES	Sales, Search Opportunities Select an opportunity. Select the Notes tab.	Enter notes and attachments regarding the opportunity.

Entering and Viewing Notes and Attachments

Access the Lead - Notes or Opportunity - Notes page.

Note. The History page appears in both the Lead and Opportunity components. Although this screen shot is from the Opportunity component, the information applies to leads and opportunities.



Opportunity - Notes page

Select	Select this check box to designate that you will send the note to the customer by email.
Subject	When you click a subject link, the system displays the Note Details section at the bottom of the page.
Email	Click this button to access the Outbound Email page, where you can send an email with notes and attachments to the customer.
Add Note	When you click this button, the system displays the Add a Note section at the bottom of the page.
Apply Note	When you click this button, the system adds the note to the Notes Summary section of the page.
Add an Attachment	Click this link to add an attachment to the lead or opportunity.

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

CHAPTER 16

Managing Leads and Opportunities

This chapter discusses how to:

- Search for leads and opportunities.
- Manage leads and opportunities on the search page.
- Manage a lead or opportunity by using the summary.
- View history.

Searching for Leads and Opportunities

This section discusses how to search for existing leads and opportunities.

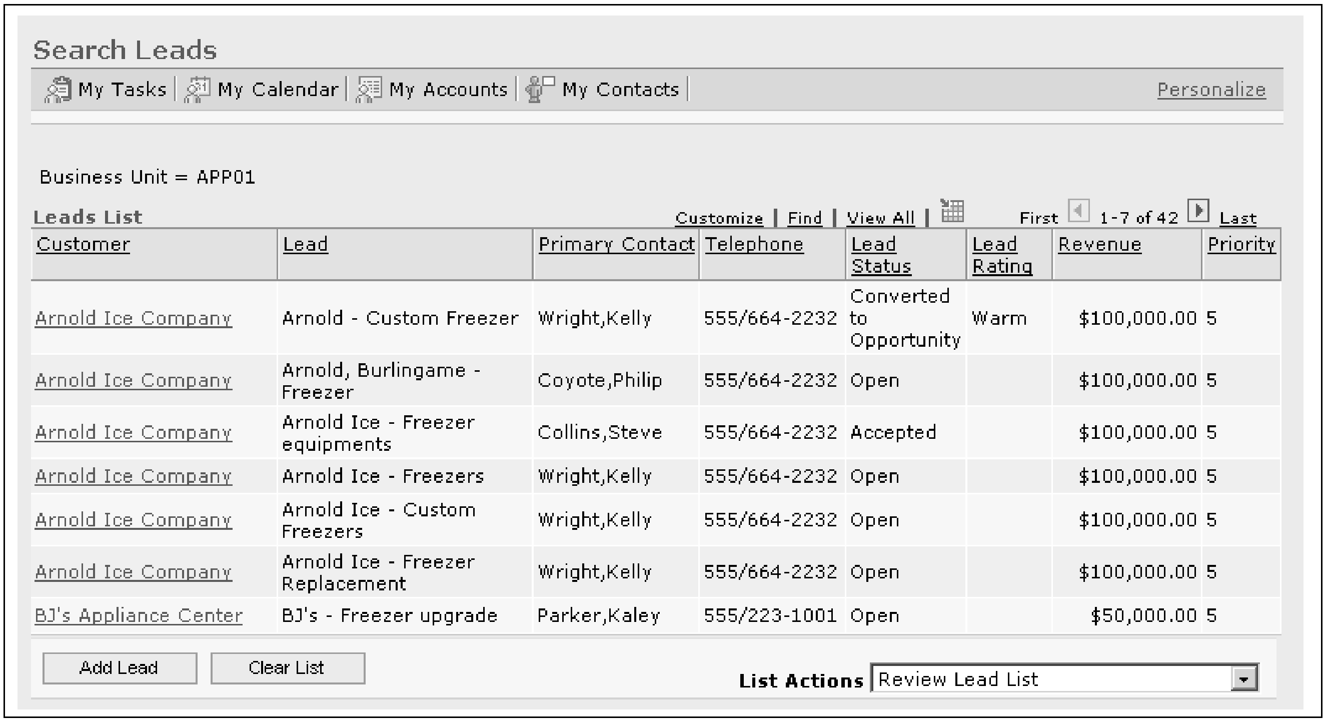
Pages Used to Search for Leads and Opportunities

Page Name	Object Name	Navigation	Usage
Search Leads	RSF_LEADS_HOME_GRD	Sales, Search Leads	Search for leads.
Search Opportunities	RSF_OPP_HOMEPAGE	Sales, Search Opportunities	Search for opportunities.

Searching for Leads and Opportunities

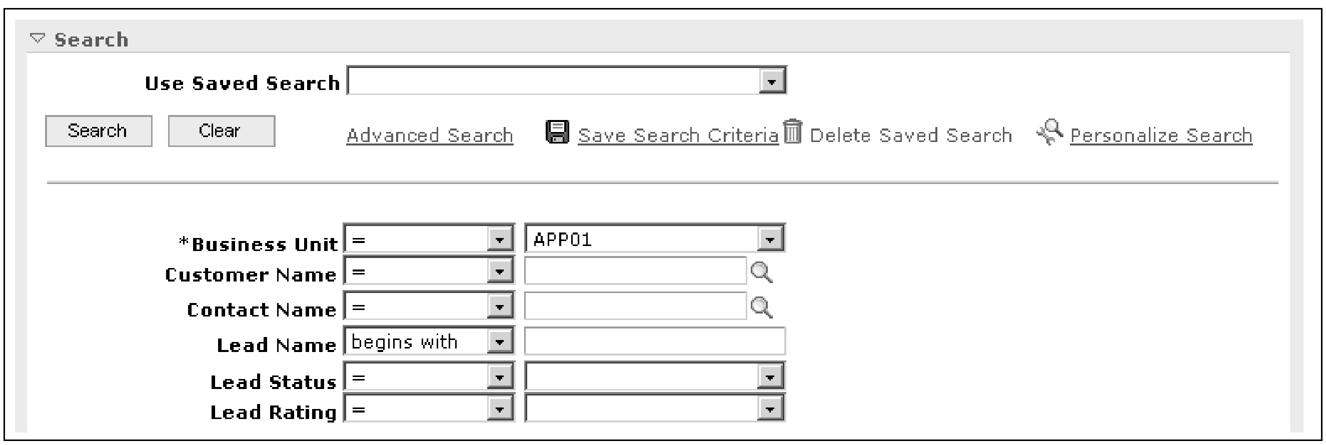
Access the Search Leads or Search Opportunities page.

Note. The Search pages for leads and opportunities are similar. While this screen shot is from the Lead component, the information applies to leads and opportunities.

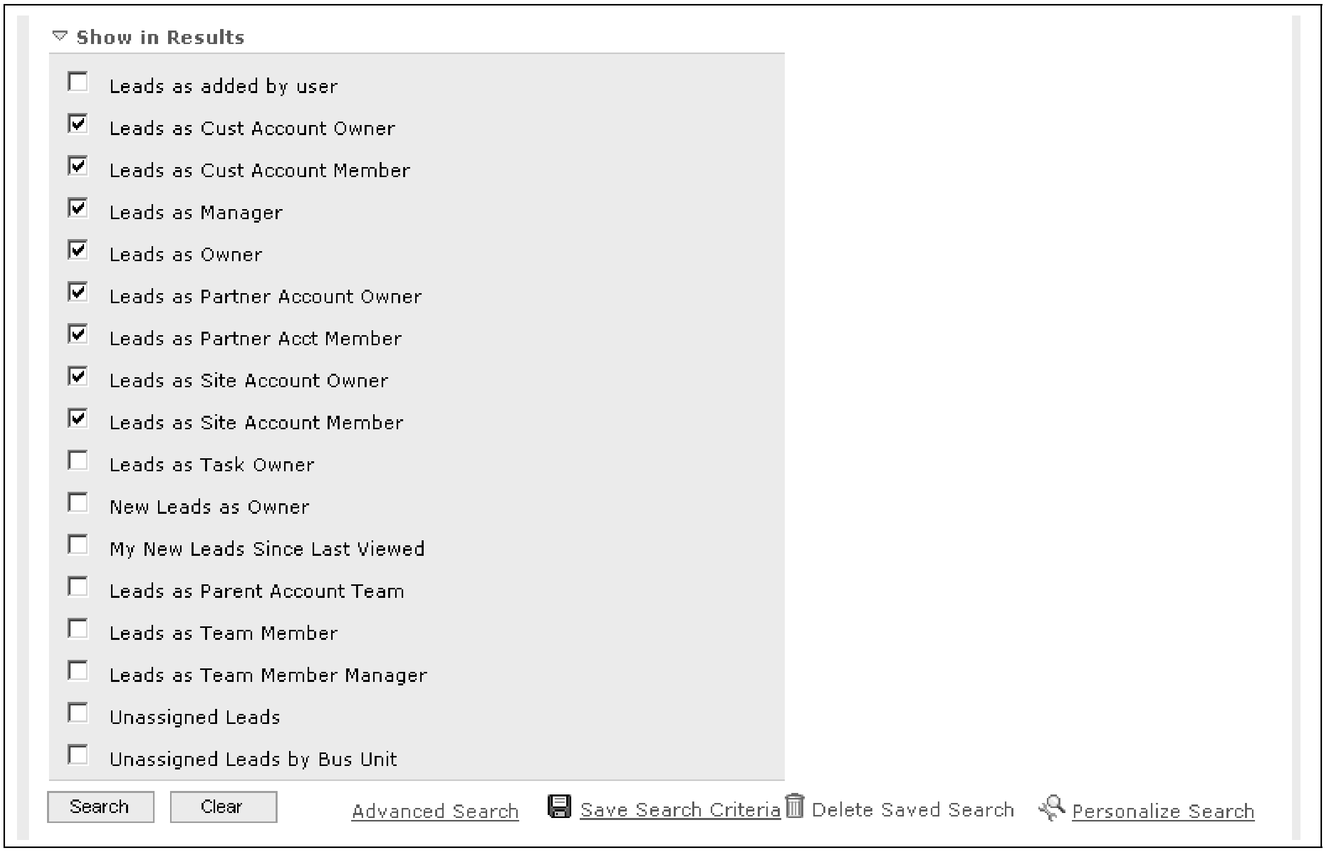


Customer	Lead	Primary Contact	Telephone	Lead Status	Lead Rating	Revenue	Priority
Arnold Ice Company	Arnold - Custom Freezer	Wright,Kelly	555/664-2232	Converted to Opportunity	Warm	$100,000.00	5
Arnold Ice Company	Arnold, Burlingame - Freezer	Coyote,Philip	555/664-2232	Open		$100,000.00	5
Arnold Ice Company	Arnold Ice - Freezer equipments	Collins,Steve	555/664-2232	Accepted		$100,000.00	5
Arnold Ice Company	Arnold Ice - Freezers	Wright,Kelly	555/664-2232	Open		$100,000.00	5
Arnold Ice Company	Arnold Ice - Custom Freezers	Wright,Kelly	555/664-2232	Open		$100,000.00	5
Arnold Ice Company	Arnold Ice - Freezer Replacement	Wright,Kelly	555/664-2232	Open		$100,000.00	5
BJ's Appliance Center	BJ's - Freezer upgrade	Parker,Kaley	555/223-1001	Open		$50,000.00	5

Search Leads (1 of 3)



Search Leads (2 of 3)



Search Leads (3 of 3)

Select the following check boxes to choose which leads or opportunities appear when you perform a search.

Note. The search fields available in the Search section and the check boxes available in the Show in Results section depends on how you configure the search pages for leads and opportunities.

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

Leads as added by user Select to display leads that you added.

Leads as Cust Account Owner (leads as customer account owner) Select to display leads for specific customers for which you are the account owner.

Leads as Cust Account Member (leads as customer account member) Select to display leads for specific customers for which you are an account member.

Leads as Manager Select to display leads that are assigned to a sales representative that you manage. The territory tree determines that sales representatives that you manage.

Leads as Owner Select to display leads for which you are the primary sales representative.

Leads as Partner Account Owner Select to display leads that have a specific partner for which you are the account owner.

Leads as Partner Acct Member (leads as partner account member)	Select to display leads that have a specific partner for which you are an account member.
Leads as Site Account Owner	Select to display leads that are for a specific site for which you are the account owner.
Leads as Site Account Member	Select to display leads that are for a specific site for which you are an account member.
Leads as Task Owner	Select to display leads that have a task that is assigned to you.
New Leads as Owner	Select to display new leads for which you are the primary sales representative.
My New Leads Since Last Viewed	Select to display new leads that have been added since the last time you viewed the search page.
Leads as Parent Account Team	Select to display leads for specific customers for which you are a member of the parent account team.
Leads as Team Member	Select to display leads for which you are a team member.
Leads as Team Member Manager	Select to display leads for which you are the team member manager.
Unassigned Leads	Select to display unassigned leads.
Unassigned Leads by Bus Unit (unassigned leads by business unit)	Select to display unassigned leads sorted by business unit.

Managing Leads and Opportunities on the Search Page

The Search Leads and Search Opportunities pages enable you to manage multiple leads and opportunities. You can change priorities, change the sales representative assignment, and reject or accept leads on the search page. For example, you can display all your leads and then reprioritize them. This section discusses how to:

- Prioritize leads and opportunities.
- Change the sales representative assignment.
- Reject or accept leads.
- Update the forecast for opportunities.
- Update the sales stage for opportunities.

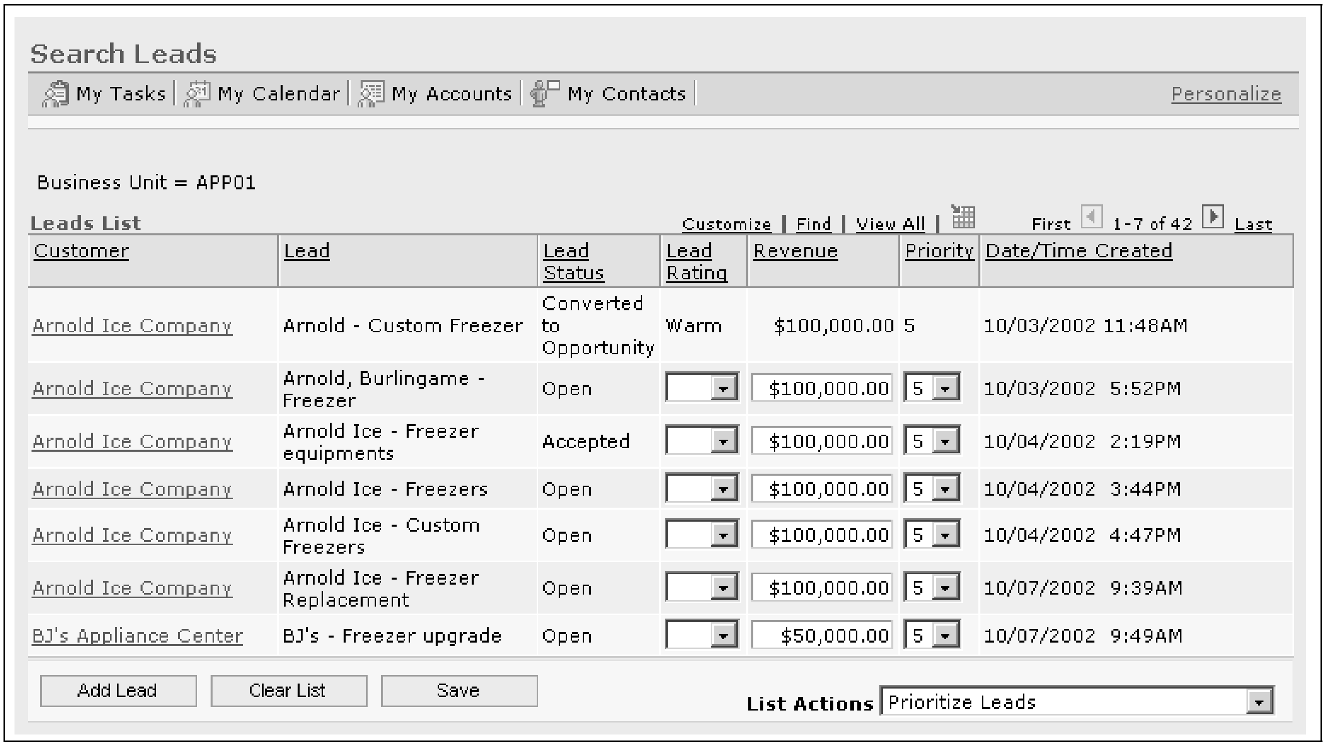
Pages Used to Manage Leads and Opportunities

Page Name	Object Name	Navigation	Usage
Search Leads	RSF_LEADS_HOME_GRD	Sales, Search Leads	Manage leads.
Search Opportunities	RSF_OPP_HOMEPAGE	Sales, Search Opportunities	Manage opportunities.

Prioritize Leads and Opportunities

Access the Search Leads or Search Opportunities page.

Note. The search pages for leads and opportunities are similar. While this screen shot is from the Lead component, the information applies to leads and opportunities.



Search Leads

My Tasks | My Calendar | My Accounts | My Contacts | Personalize

Business Unit = APP01

Leads List — Customize | Find | View All | First 1-7 of 42 Last

Customer	Lead	Lead Status	Lead Rating	Revenue	Priority	Date/Time Created
Arnold Ice Company	Arnold - Custom Freezer	Converted to Opportunity	Warm	$100,000.00	5	10/03/2002 11:48AM
Arnold Ice Company	Arnold, Burlingame - Freezer	Open		$100,000.00	5	10/03/2002 5:52PM
Arnold Ice Company	Arnold Ice - Freezer equipments	Accepted		$100,000.00	5	10/04/2002 2:19PM
Arnold Ice Company	Arnold Ice - Freezers	Open		$100,000.00	5	10/04/2002 3:44PM
Arnold Ice Company	Arnold Ice - Custom Freezers	Open		$100,000.00	5	10/04/2002 4:47PM
Arnold Ice Company	Arnold Ice - Freezer Replacement	Open		$100,000.00	5	10/07/2002 9:39AM
BJ's Appliance Center	BJ's - Freezer upgrade	Open		$50,000.00	5	10/07/2002 9:49AM

Add Lead | Clear List | Save — List Actions: Prioritize Leads

Search Leads page

Select *Prioritize Leads* as the List Actions.

Lead Rating — Indicates the degree, *Hot, Warm,* or *Cold*, of the customer's interest or potential for making the sale.

Define rating values on the Lead Ratings page.

See Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up Lead Ratings, page 34.

Revenue — Enter the revenue for the lead.

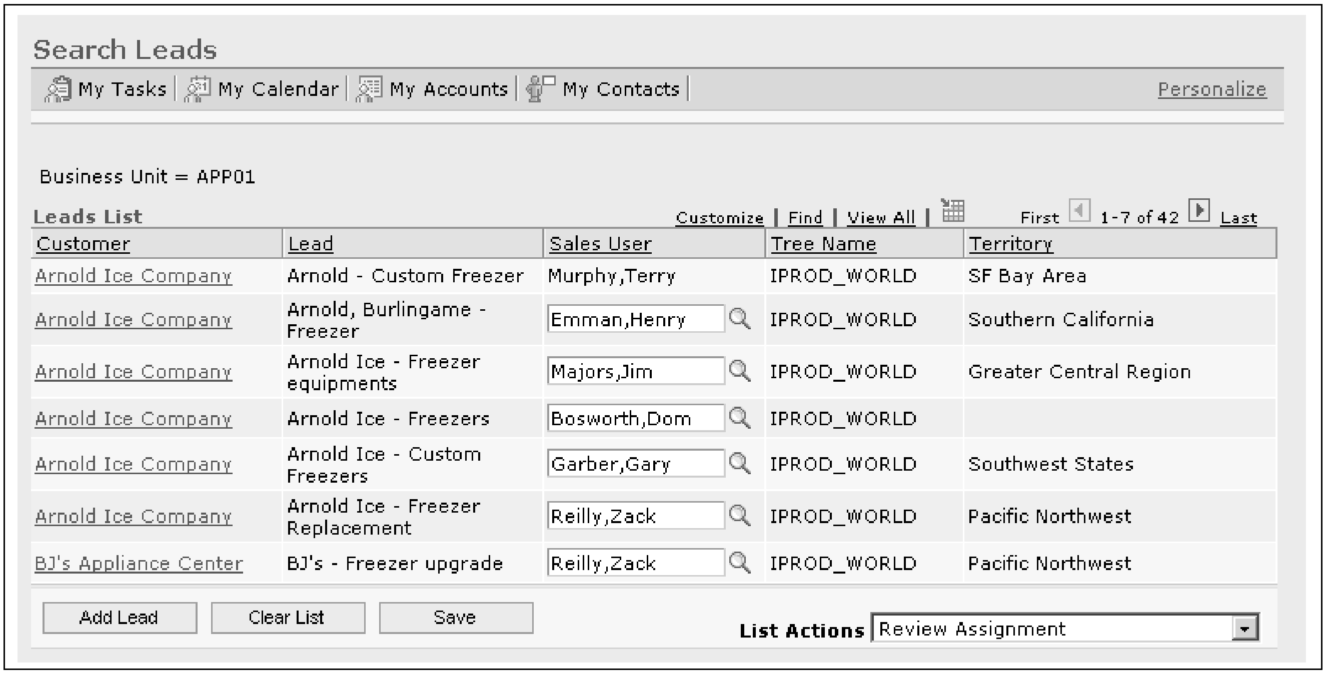
Priority — Select a priority to indicate the urgency of working this opportunity. Priority values are translate values.

Note. If the lead has been converted to an opportunity, you cannot change the rating, revenue or priority for the lead.

Changing the Sales Representative Assignment

Access the Search Leads or Search Opportunities page.

Note. The search pages for leads and opportunities are similar. While this screen shot is from the Lead component, the information applies to leads and opportunities.



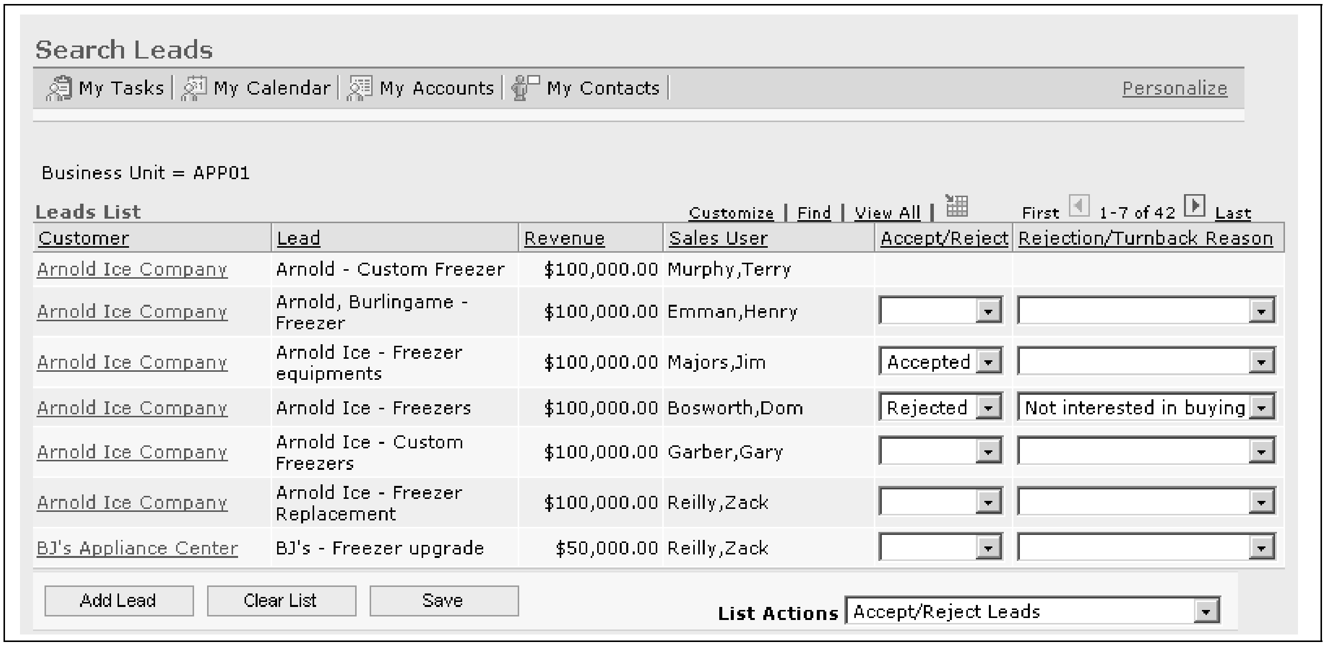
Search Leads page

Select *Review Assignment* as the List Actions.

Select a different sales representative in the Sales User field if you want to make a change.

Rejecting or Accepting Leads

Access the Search Leads page.



Search Leads page

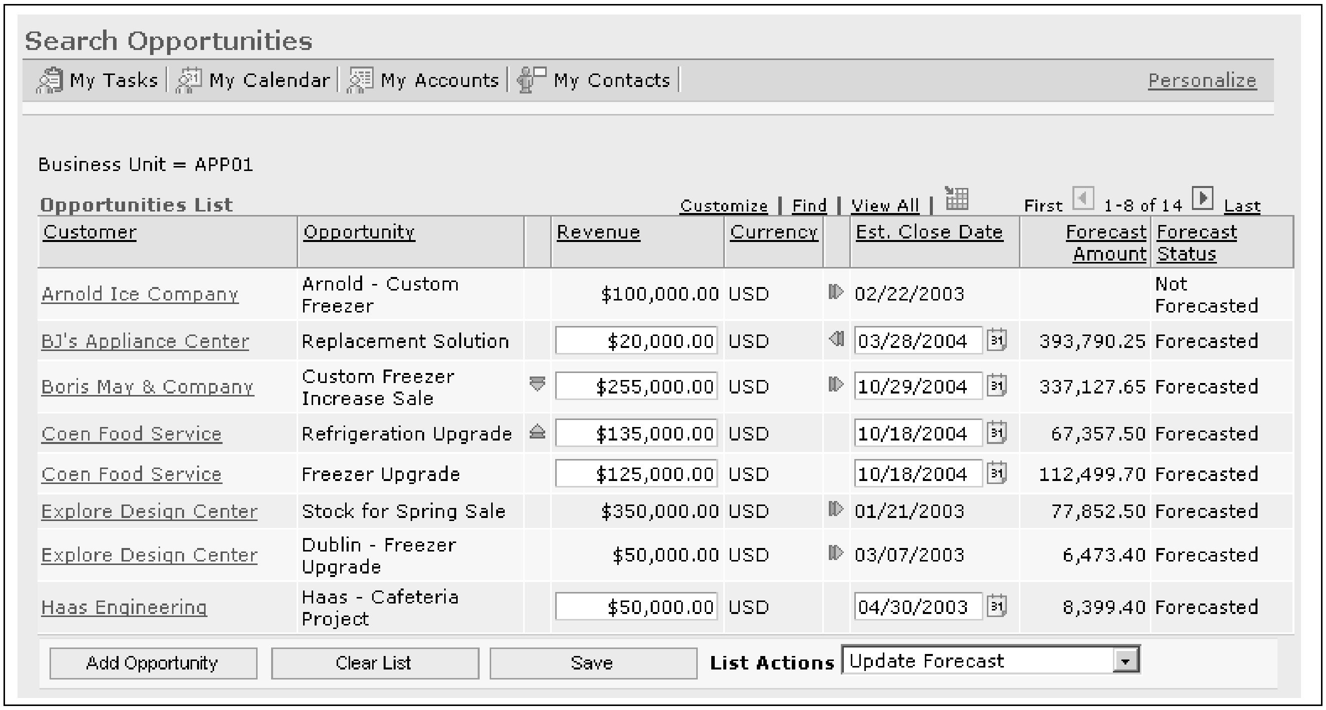
Select *Accept/Reject Leads* as the List Actions.

Accept/Reject Select whether you accept the lead. Values are *Accepted*, *Rejected* or *Turnback*.

Rejection/Turnback Reason Select a reason for rejecting or turning back the lead.

Updating the Forecast for Opportunities

Access the Search Opportunities page.



Search Opportunities page

Select *Update Forecast* as the List Actions.

Revenue

Enter the amount of revenue that is anticipated from the sale.

The system displays arrows in the column before the column for this field. The green arrow signifies that the Revenue has increased, and the red arrow signifies that the Revenue has decreased.

Est. Close Date (estimated close date)

Enter a date that the system uses to determine whether to include the opportunity in the pipeline or forecast based on the time period that is specified for that pipeline or forecast.

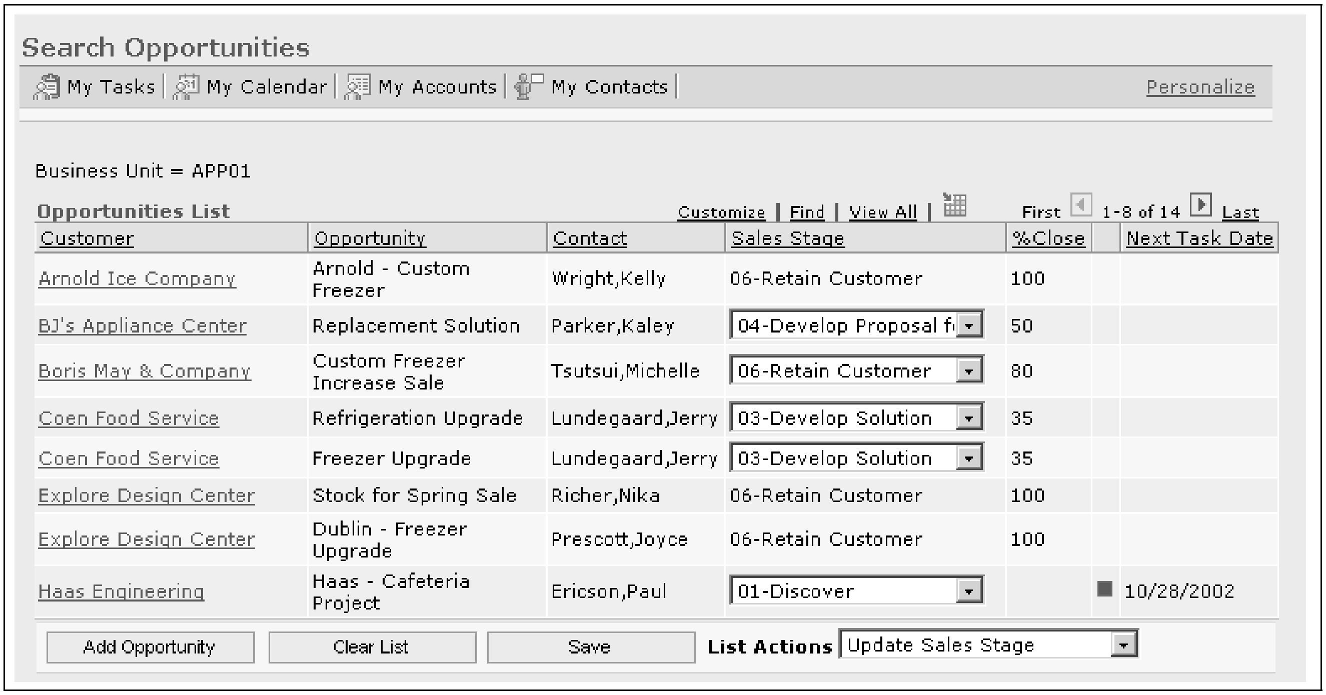
The system displays arrows in the column before the column for this field. The green arrow signifies that the Est. Close Date has been moved in to a sooner date, and the red arrow signifies that the Est. Close Date has moved out to a later date.

Forecast Amount

If you have created a forecast for the opportunity, the system displays the forecast amount.

Updating the Sales Stage for Opportunities

Access the Search Opportunities page.



Search Opportunities page

Select *Update Sales Stage* as the List Actions.

Sales Stage

Select the current stage of the sales process for this opportunity. The system populates this drop-down list box with values that are based on the specified sales process.

Set up sales stages on the Sales Process page.

See Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up a Sales Process, page 27.

Managing a Lead or Opportunity by Using the Summary

The Summary page in the Lead and Opportunity component provides a useful place for a sales representative or manager to view high-level information for a lead or opportunity. The Summary page displays the sales stage, forecast (for opportunities), contacts, tasks, notes, sales team, products and quotes. In addition, the page displays links, so that you can click on a link to go to the component page which contains the detailed information for the particular type of data you want to access.

You can configure the Summary page to meet your specific needs.

See Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up the Summary Page for Leads and Opportunities, page 57.

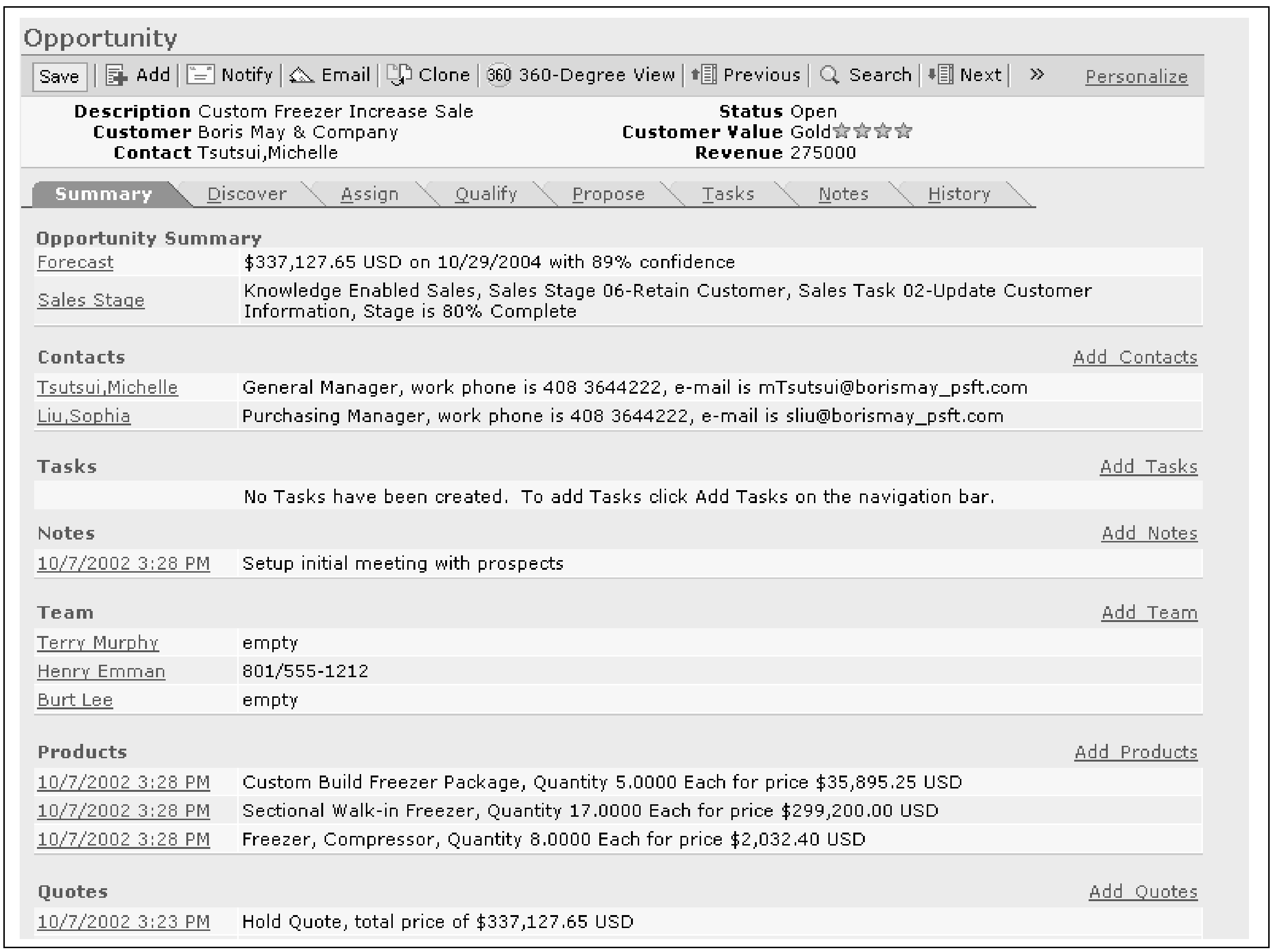
Pages Used to Manage a Lead or Opportunity by Using the Summary

Page Name	Object Name	Navigation	Usage
Lead - Summary	RSF_LEAD_SUMMARY	Sales, Search Leads Select a lead. Select the Summary tab.	Manage a lead.
Opportunity - Summary	RSF_OPP_SUMMARY	Sales, Search Opportunities Select an opportunity. Select the Summary tab.	Manage an opportunity.

Managing a Lead or Opportunity by Using the Summary

Access the Lead - Summary page or the Opportunity - Summary page.

Note. The Summary page appears in both the Lead and Opportunity components. While this screen shot is from the Opportunity component, the information applies to leads and opportunities.



Opportunity - Summary page

Opportunity Summary Click the Forecast link to access the Forecast Summary section of the Discover page. Click the Sales Stage link to access the Sales Stage section of the Discover page.

Contacts Click the link for an existing contact or the Add Contacts link to access the Contact section of the Discover page.

Tasks Click the date/time link for an existing task or the Add Tasks link to access the Tasks page.

Notes Click the date/time link for an existing note or the Add Notes link to access the Notes page.

Team Click the link for an existing team member or the Add Team link to access the Assign page.

Products Click the date/time link for an existing product or the Add Products link to access the Propose page.

Quotes Click the date/time link for an existing quote or the Add Quotes link to access the Propose page.

Viewing History for a Lead or Opportunity

This section discusses how to view the history for a lead or opportunity.

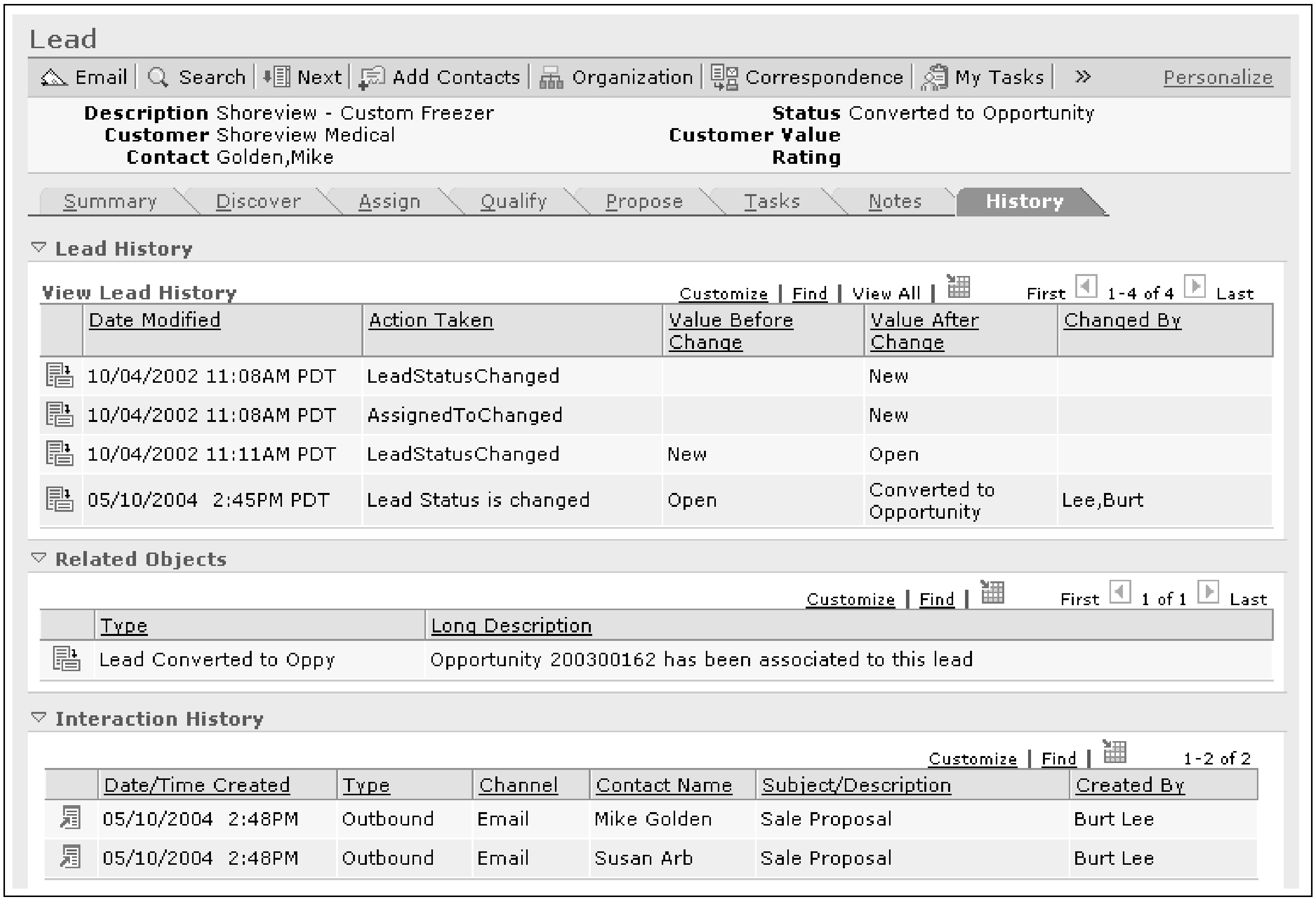
Pages Used to View History for a Lead or Opportunity

Page Name	Object Name	Navigation	Usage
Lead - History	RSF_LE_HISTORY	Sales, Search Leads Select a lead. Select the History tab.	View a history of system actions regarding a lead.
Opportunity - History	RSF_OPP_HISTORY	Sales, Search Opportunities Select an opportunity. Select the History tab.	View a history of system actions regarding an opportunity.

Viewing History

Access the Lead - History page or the Opportunity - History page.

Note. The History page appears in both the Lead and Opportunity components. Although this screen shot is from the Lead component, the information applies to leads and opportunities.



Lead - History page

In the Lead History section, you can view information here about internal actions, such as status changes, that you or any member of the sales team take for this lead or opportunity.

See Chapter 9, "Understanding Sales Leads and Opportunities," Understanding History Tracking for Leads and Opportunities, page 111.

In the Related Objects section, you can view the associated opportunity, if the lead has been converted to an opportunity.

In the Interaction History section, you can view information, such as email or other correspondence, about interactions regarding the lead or opportunity.

CHAPTER 17

Sending Sales Emails and Correspondence

This chapter discusses how to:

- Send a proposal or quote to a customer.
- Send a worklist notification to a sales user or team.
- Generate ad hoc email notifications.

See Also

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

Sending a Proposal or Quote to a Customer

PeopleSoft Sales enables you send a quote or a proposal package to a customer by email, or by printing a hard copy and sending it. A proposal package may include cover letter, quote, and relevant attachments. This section discusses how to:

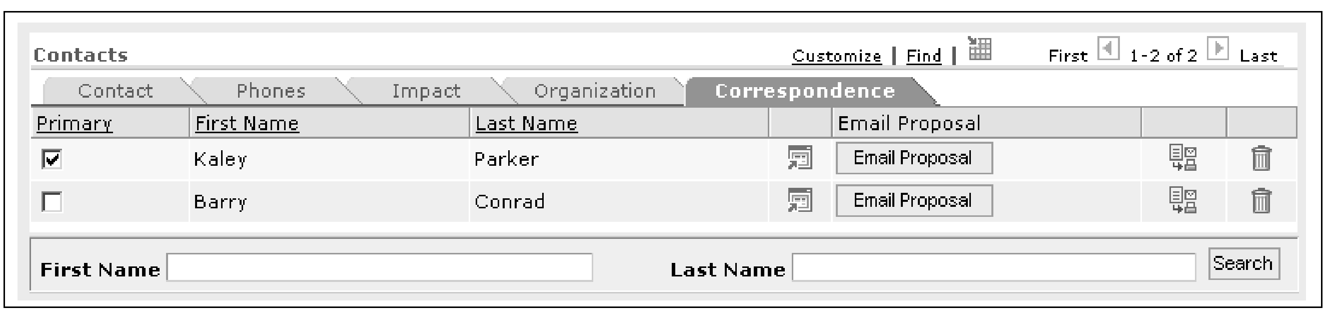
- Select the contact who receives the proposal or quote.
- Create the correspondence.

Pages Used to Send a Proposal or Quote to a Customer

Page Name	Object Name	Navigation	Usage
Lead - Discover	RSF_LEAD_DETAIL	Sales, Search Leads. Navigate to the Contacts section and then click the Correspondence tab.	Send email to a customer contact.
Opportunity - Discover	RSF_OPP_DETAIL	Sales, Search Opportunities. Navigate to the Contacts section and then click the Correspondence tab.	Send email to a customer contact.
Correspondence Request	RBC_REQST_FORM	• Click the Email Proposal button on the Correspondence tab of the Contacts section of the Discover page. • Click the Correspondence link in the toolbar.	Create correspondence to send to a customer.
Templates	RBC_REQST_TEMPLATE	Click the Personalize Templates button on the Correspondence page.	Edit the template package to send to the contact.
Correspondence Request Details	RBC_REQST_PREVIEW	Click the View Proposal Request icon on the Correspondence tab of the Contacts section of the Discover page.	View a proposal package to send to the contact.

Selecting the Contact Who Receives the Proposal or Quote

Access the Discover page. Select the Correspondence tab.



Opportunities - Discover page: Correspondence tab

Email Proposal

Click this button to access the Create Correspondence page, which is preconfigured to log a request for the system to email the sales proposal package to this contact. The proposal package consists of a personalized cover letter and quote with related proposal documents. The cover letter serves as the body of the email; the quote and related proposal documents are attachments.

View and personalize the merged data from the Create Correspondence page.

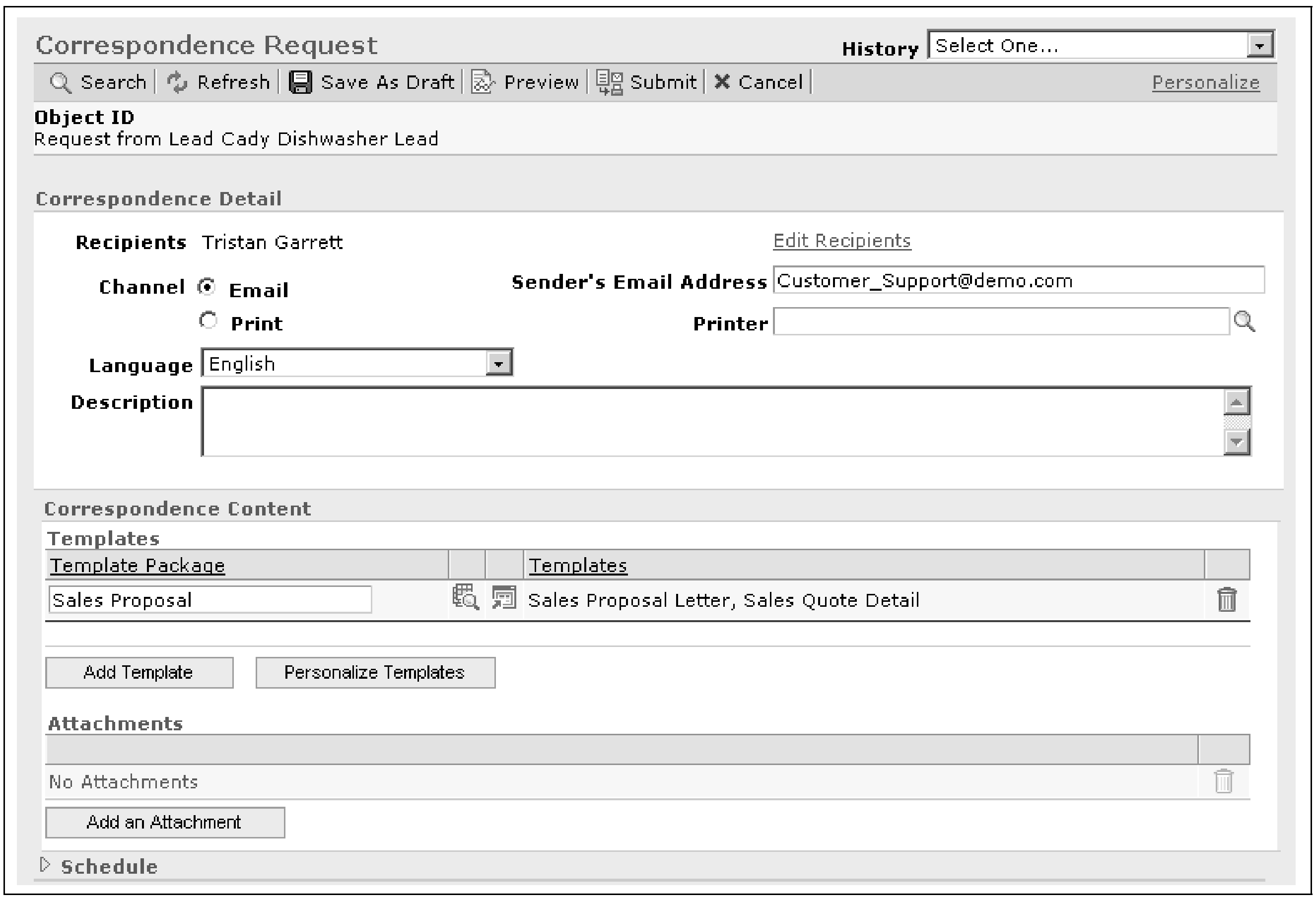
Click the View Proposal Request icon to access the Correspondence Request Detail page to confirm that the request is logged, determine its status, and view the error log, if any. This icon becomes active after you click the Email Proposal button.

After emailing the proposal, access the History page to confirm that the proposal is sent and to see a list of all correspondence that is sent to any contact for the lead or opportunity. You can also access the correspondence to view its contents.

Note. You can also access the Correspondence Request page by selecting the Correspondence link on the toolbar. If you do this, the system adds all the contacts on the lead or opportunity to the recipient list for the correspondence.

Creating the Correspondence

Access the Correspondence Request page.



Correspondence Request page

Template Package — Select a template package that defines a set of documents that you send to the contact.

Personalize Templates — Click this button to access the Templates page, where you can edit the template package that will be sent to the contact.

In the Schedule section, you can choose when you merge the proposal and when you send the proposal.

Sending a Worklist Notification to a Sales User or Team

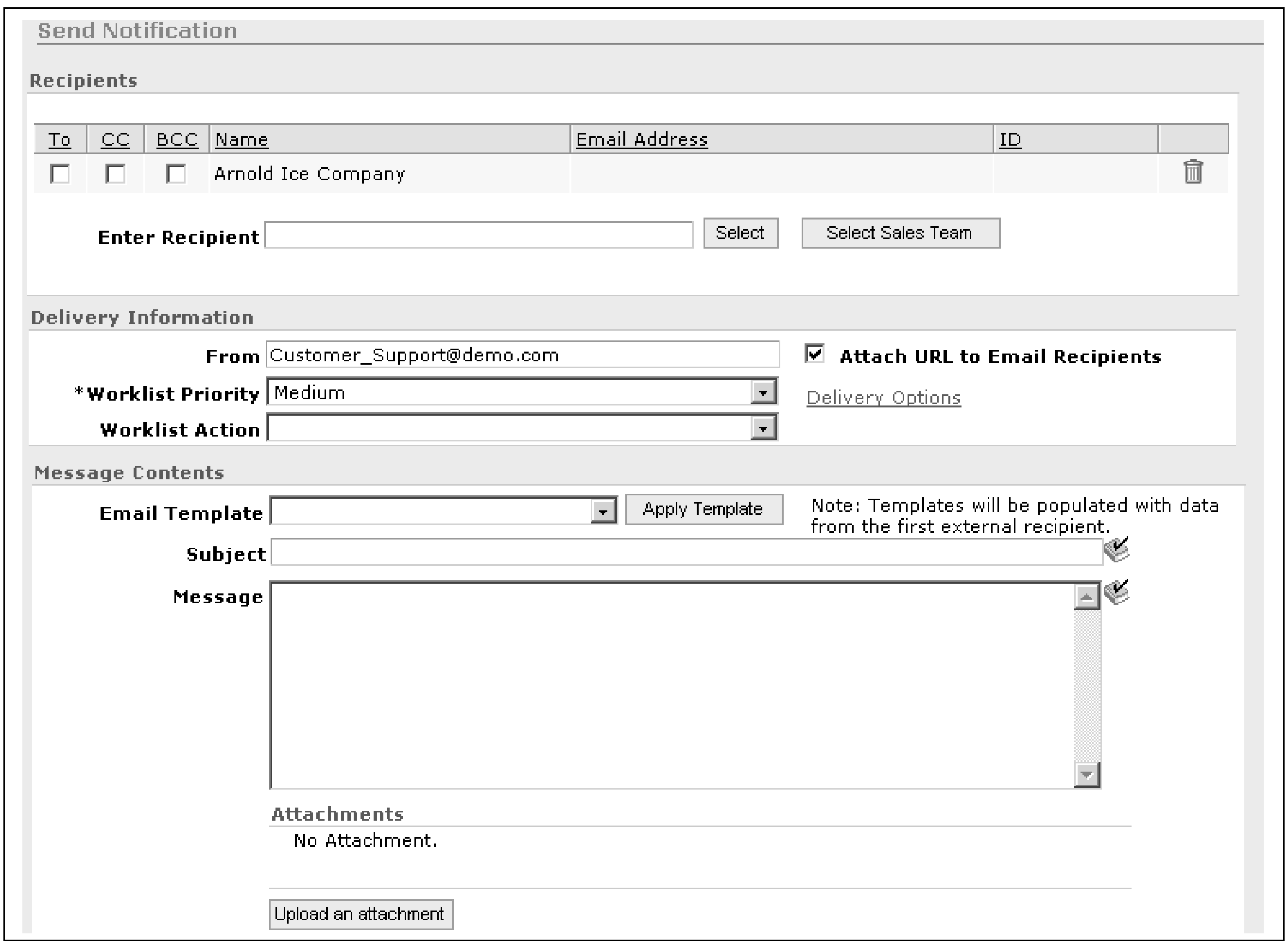
Use PeopleSoft Sales to send a worklist notification with a text message and link to the current lead or opportunity. This section discusses how to send a worklist notification to a sales user or team.

Page Used to Send a Workflow Notification to a Sales User or Team

Page Name	Object Name	Navigation	Usage
Send Notification	RSF_LEAD_WORKLIST	Click the Notify link from the toolbar in the Lead component.	Send a worklist notification to a sales user or team.
Send Notification	RSF_OPP_WORKLIST	Click the Notify link from the toolbar in the Opportunity component.	Send a worklist notification to a sales user or team.

Sending a Worklist Notification to a Sales User or Team

Access the Send Notification page.



Send Notification page

Select Click this button to select a sales user.

Select Sales Team Click this button to select a sales team.

Worklist Priority Select a priority for the worklist notification. Values are *Low, Medium,* and *High.*

Worklist Action Select the action that you want the recipient to take.

Email Template Select a template to use for the notification.

Apply Template Click this button to apply the template to the page.

Generating Ad Hoc Email Notifications

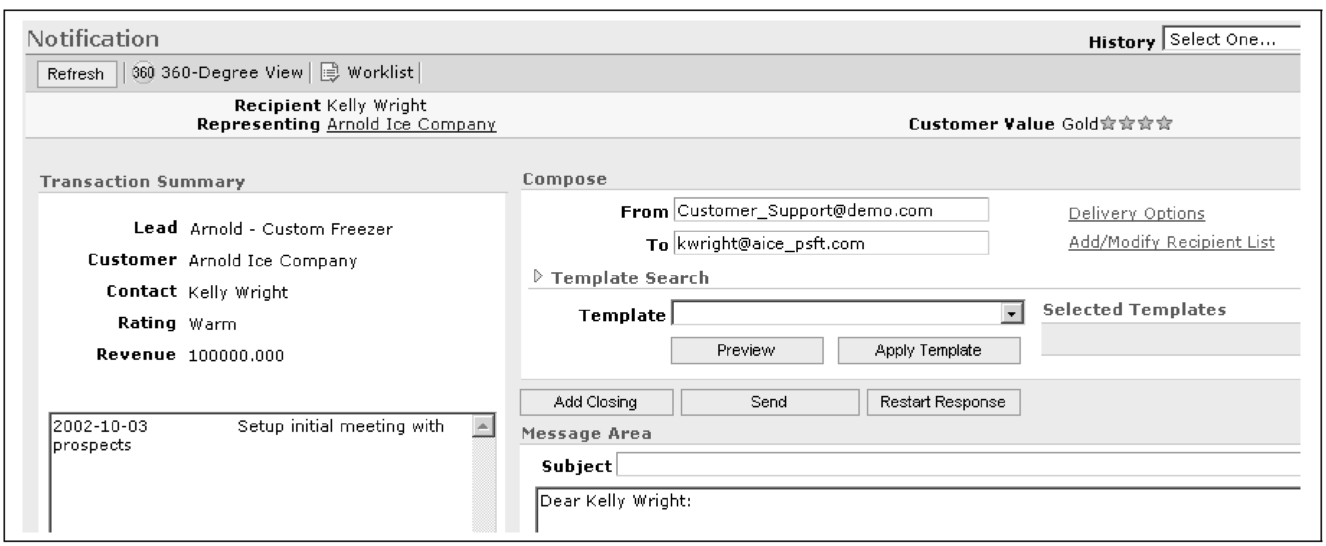
Use PeopleSoft Sales to send an email to a customer contact or to the sales team. This section discusses how to generate ad hoc email notifications.

Page Used to Generate Ad Hoc Email Notifications

Page Name	Object Name	Navigation	Usage
Notification	RB_EM_OB_ADD	Click the Email link in the toolbar of any Lead or Opportunity page.	Generate and send an ad hoc email notification to a customer contact or a member of the sales team.

Generating Ad Hoc Email Notifications

Access the Notification page.



Notification page

Template Select a template to use for the email.

Preview Click this button to view a preview of the email if you apply the template.

Apply Template Click this button to apply the template to the page.

CHAPTER 18

Viewing the Opportunity Pipeline

This chapter provides an overview of the opportunity pipeline and discusses how to view the opportunity pipeline.

Understanding the Opportunity Pipeline

The pipeline is a real-time view of an organization's current sales efforts. It is based on opportunities only. Leads are not included in the pipeline.

The pipeline does not include opportunities with inactive status. Pipeline charts include activity from closed-lost opportunities as negative activity or leaks.

With PeopleSoft Sales, you can view:

- Segment Pipeline: Reflects current activity, based on opportunities with open status.

  This perspective is not constrained by time frame or period. Opportunities with the status of inactive, closed-won, or closed-lost are not included in this perspective.

  Segment Pipeline types include:

  - Opportunity count
  - Revenue

- Opportunity Revenue Pipeline: Represents estimated revenue, based on opportunities with open, closed-won, or closed-lost status.

  Opportunity Revenue Pipeline types include:

  - Revenue
  - Shadow

- Product Detail Pipeline: Represents product activity, based on opportunities with open, closed-won, or closed-lost status.

  Product Detail Pipeline types include:

  - Unit count
  - Revenue
  - Shadow

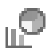
Use pipeline types to configure different perspectives of the specified pipeline. Pipeline types include:

- Opportunity count: Reflects the total number of opportunities.
- Revenue: Represents estimated revenue based on allocation percentages of the opportunity sales teams.

- Shadow: Represents estimated revenue based on shadow percentages of the opportunity sales team members.
- Unit count: Reflects product quantities for current opportunities.

Note. You cannot save real-time views of dynamic data. Therefore, if you need to preserve a particular pipeline view, use the same screen capture or print function that you use to capture or print it from the computer screen. Alternatively, you can produce a list of the opportunities that make up the pipeline by clicking the Pipeline Opportunity List button and downloading the contents to a spreadsheet.

Common Elements Used in This Chapter



Click the Chart Information button to display a message with information about the chart on the page.

View Pipeline As

To view the pipeline as another person, select that person’s name. You must have visibility of the person on the territory tree to use this feature. Viewing a pipeline as someone else is for managers who need to discusses a PeopleSoft Sales user’s pipeline with the user and who want to view the pipeline as that individual.

Quota Type

Select the type of quota for revenue allocation comparison:

- *Rollup Quota:* The sum of quotas for all sales representatives who report to the manager. This is the default.
- *Manager Quota:* The manager’s own, individual quota.

Chart Type

Select the type of graphic to use to view the pipeline. The PeopleSoft system provides these charts:

- *Bar Chart* (default)
- *Horizontal Bar Chart*
- *Horizontal Stacked Bar Chart*
- *Stacked Bar Chart*

Pipeline Opportunity List

Click to access the opportunities list, where you can view lists of the opportunities that make up the pipeline chart, and select opportunities to view them in more detail.

Viewing the Opportunity Pipeline

This section discusses how to:

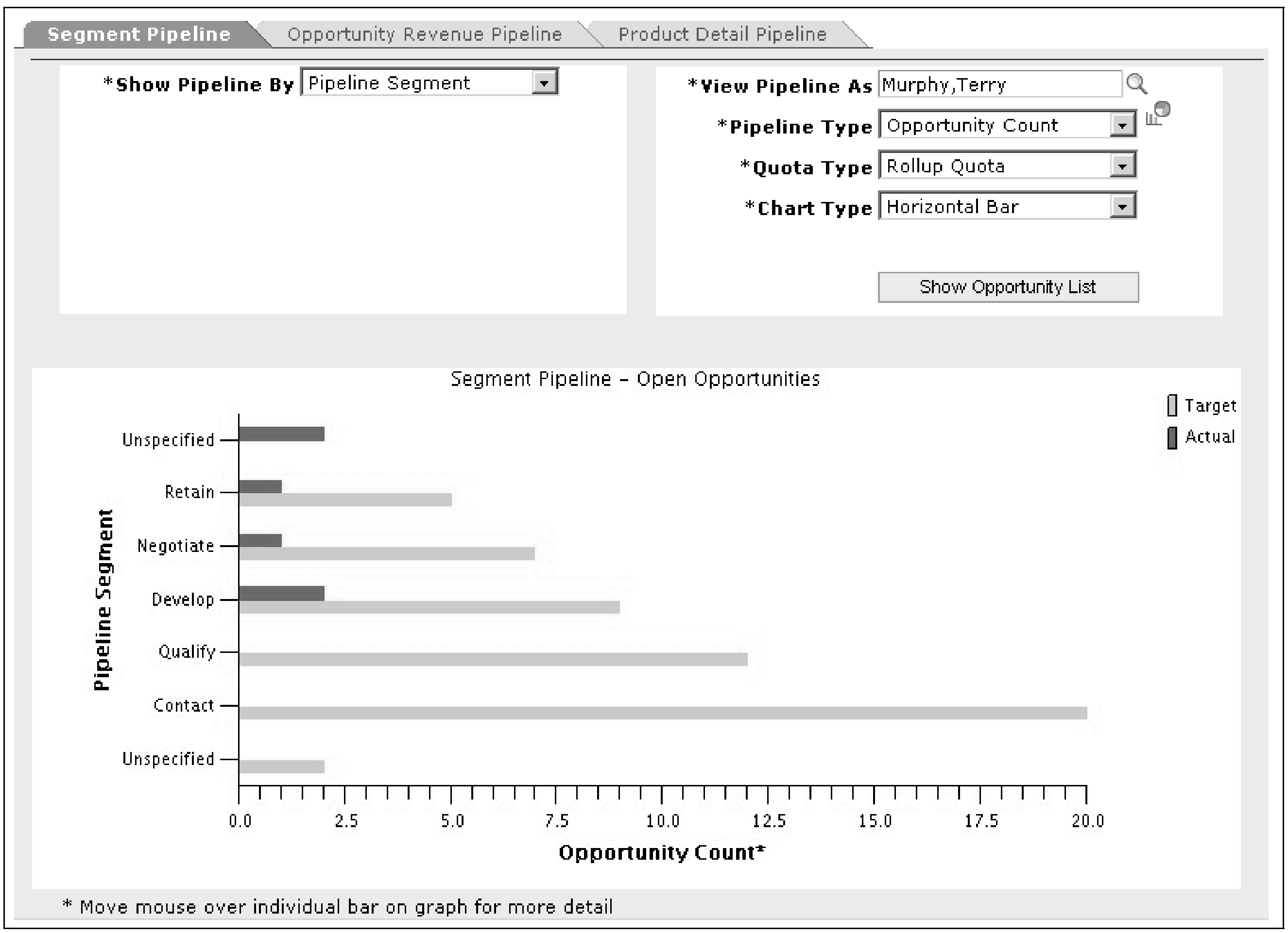
- View the segment pipeline.
- View the opportunity revenue pipeline.
- View the product detail pipeline.

Pages Used to View the Opportunity Pipeline

Page Name	Object Name	Navigation	Usage
Segment Pipeline	RSF_PL_SEG	Sales, Review Pipeline	Configure and view the pipeline of opportunities in different stages of the sales process.
Opportunity Revenue Pipeline	RSF_PL_OPP	Sales, Review Pipeline Select the Opportunity Revenue Pipeline tab.	Configure and view the pipeline of revenue from opportunities.
Product Detail Pipeline	RSF_PL_PROD	Sales, Review Pipeline Select the Product Detail Pipeline tab.	Configure and view the pipeline of products that are associated with active opportunities.

Viewing the Segment Pipeline

Access the Segment Pipeline page.



Segment Pipeline page

In addition to the elements that are common to all of the pipeline pages, you must specify the following:

Show Pipeline By

Select how to organize data for the pipeline. Values are:

- *Business Unit.*
- *Industry.*
- *Pipeline Segment:* Pipeline segments correlate with stages in the sales process. This is the default.

  See Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up Pipeline Segments, page 51.
- *Region.*
- *Sales User.*
- *Territory.*

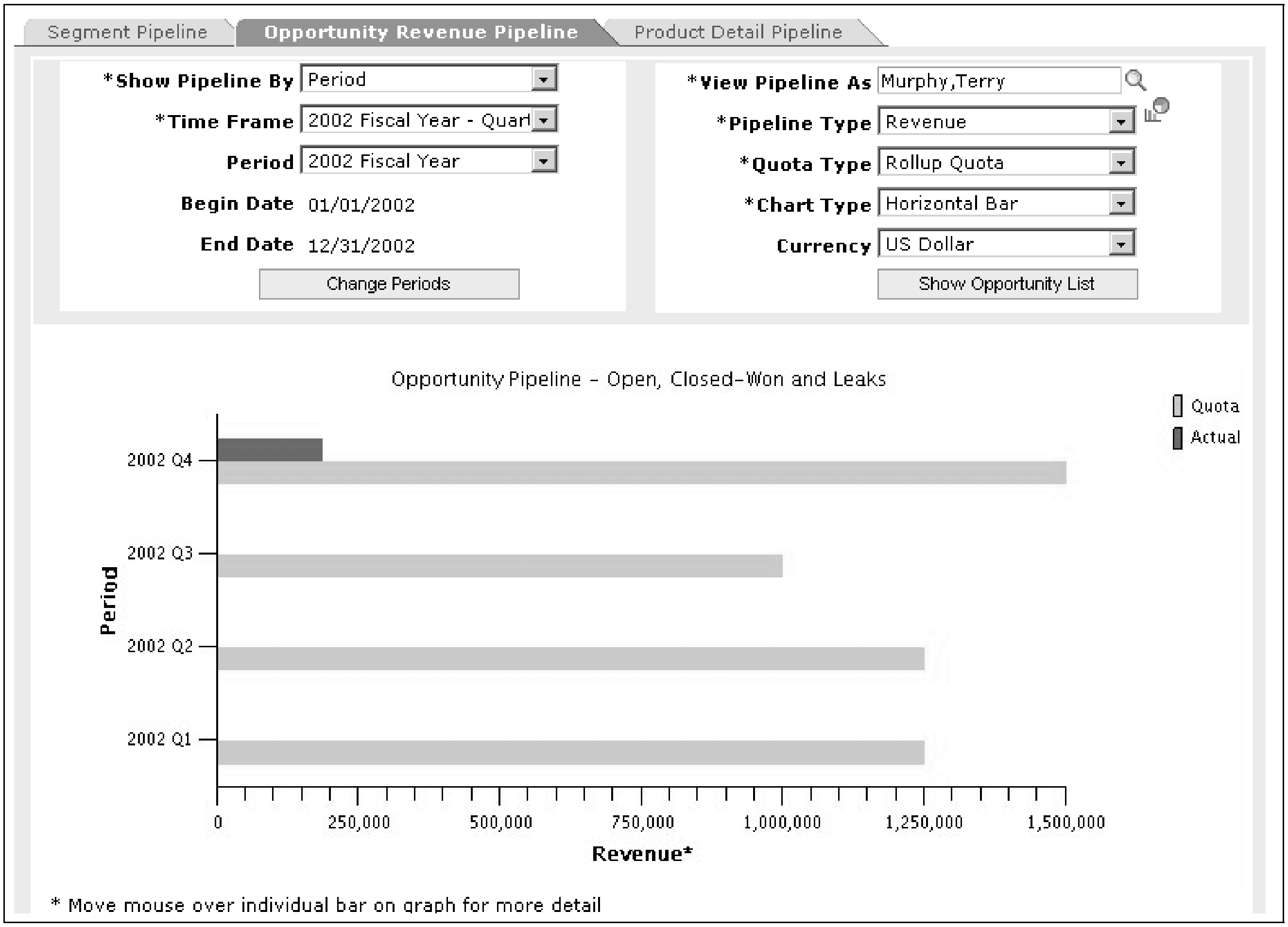
Pipeline Type

Select the type of pipeline to render. Values are:

- *Opportunity Count:* Based on the number of opportunities with the status of *Open.*
- *Revenue:* Estimated opportunity revenue from the opportunity sales teams' revenue allocation percentages. (You cannot render a pipeline from shadow allocations.)

Viewing the Opportunity Revenue Pipeline

Access the Opportunity Revenue Pipeline page.



Opportunity Revenue Pipeline page

The revenue pipeline includes opportunities with estimated close dates that are within the specified time frame and with a status of open, closed - won, or closed - lost. Inactive opportunities are not included. Closed - lost opportunities appear as leaks in the pipeline.

In addition to the elements that are common to all of the pipeline pages, to render an opportunity revenue pipeline, you must specify the following:

Show Pipeline By

Select how to organize data for the pipeline. Values are:

- *Business Unit.*
- *Industry.*
- *Opportunity Status.*
- *Period.*
- *Pipeline Segment:* Pipeline segments correlate with stages in your sales process. This is the default.

  See Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up Pipeline Segments, page 51.
- *Region.*
- *Sales User.*

- *Territory.*

Pipeline Type Select the type of pipeline to render. Values are:

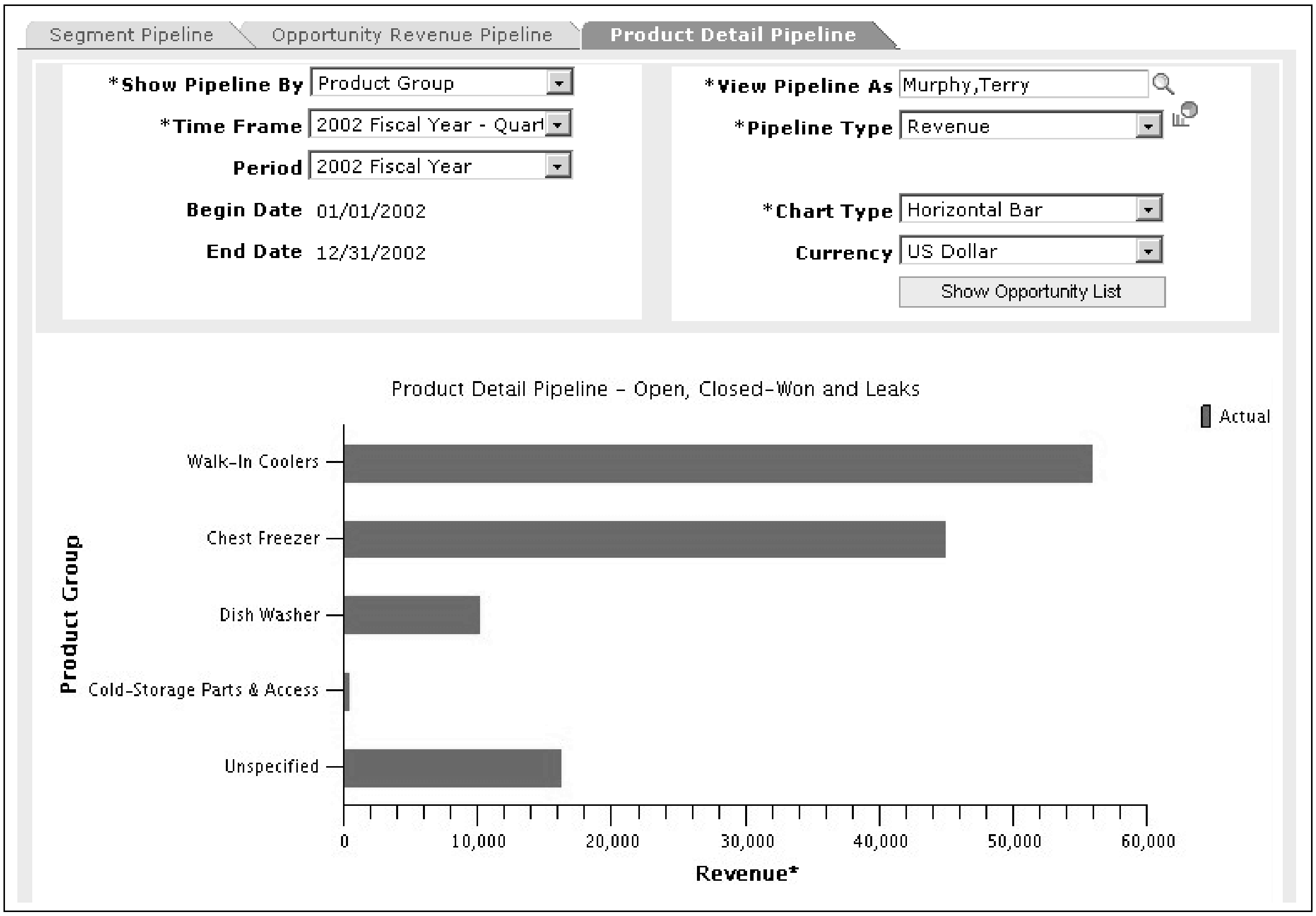
- *Revenue:* Estimated revenue based on opportunity sales team revenue allocations.
- *Shadow:* Estimated revenue based on opportunity sales team member shadow allocations.

Time Frame and **Period** Select the time frame and reporting period to use for determining revenue in the pipeline.

Currency Select the currency in which to express the pipeline revenue amounts.

Viewing the Product Detail Pipeline

Access the Product Detail Pipeline page.



Product Detail Pipeline page

In addition to the elements common to all of the pipeline pages, you must specify the following:

Show Pipeline By Select how to organize data for the pipeline. Values are:

- *Business Unit.*
- *Industry.*

- *Opportunity Status.*
- *Period.*
- *Pipeline Segment:* Pipeline segments correlate with stages in the sales process. This is the default.

  See Chapter 4, "Setting Up Sales Leads and Opportunities," Setting Up Pipeline Segments, page 51.
- *Product:* When you select the pipeline type of *Unit Count,* the system sets the Show Pipeline By field to *Product.*
- *Product Group.*
- *Region.*
- *Revenue Type.*
- *Sales User.*
- *Territory.*

Pipeline Type Select the type of pipeline to render. Values are:

- *Revenue:* Estimated product cost based on opportunity sales team revenue allocations. This is the default.
- *Shadow:* Estimated product cost based on opportunity sales team member shadow allocations.
- *Unit Count:* Estimated product quantities.

Time Frame and **Period** Select the time frame and reporting period to use for determining opportunities in the pipeline.

CHAPTER 19

Including Opportunities in Forecasts and Closing Opportunities

This section provides an overview of including opportunities in forecasts and closing opportunities, and discusses how to:

- Include opportunities in forecasts.
- Close opportunities.

Understanding the Inclusion of Opportunities in Forecasts and Closing Opportunities

To include an opportunity's potential revenue on a sales forecast, the sales representative must update forecasting data on the opportunity. The sales representative can copy the products from the opportunity's proposal to the forecast for the opportunity.

Some companies offer products that generate recurring revenue. For example, an internet service provider may offer a one-year service contract that generates $20 per month in revenue. Other companies, such as wireless companies, offer products with both one-time and recurring revenue. For example, a wireless company may offer a package with a cellular phone (non-recurring revenue) and a monthly calling plan (recurring revenue). PeopleSoft Enterprise Sales enables you to forecast for both of these scenarios.

If an opportunity has multiple sales representatives assigned to it, the sales manager uses the Revenue Percentage tab on the Opportunity - Assign page to specify how to allocate the forecast among the sales representatives.

After the customer has made a decision, you can close the opportunity. If you have open forecasts for an opportunity that was Closed-Won, you can specify whether you want to continue to forecast revenue for the opportunity.

Including Opportunities in Forecasts

This section discusses how to:

- Use the forecast summary.
- Copy products to the forecast.
- Use recurring forecasts.
- Specify revenue percentages for forecasting.

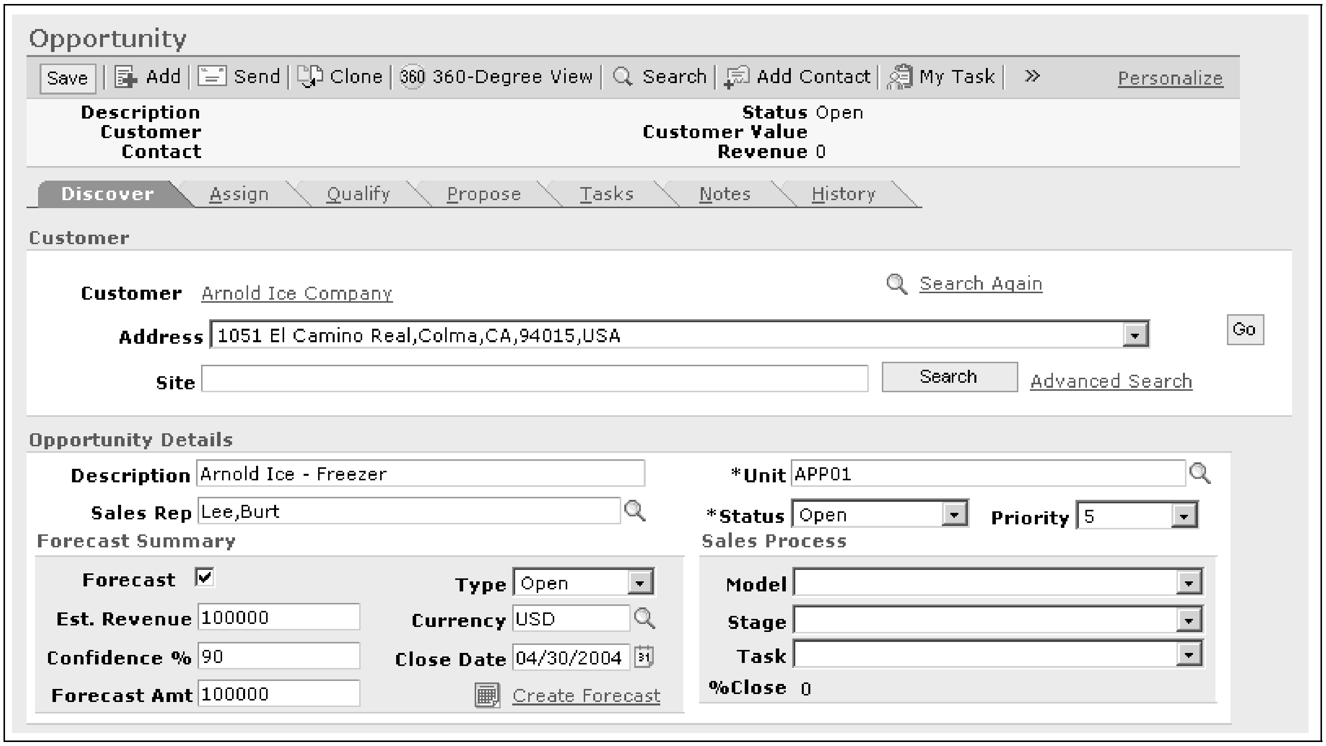
- Include forecast items in compensation calculations.

Pages Used to Include Opportunities in Forecasts

Page Name	Object Name	Navigation	Usage
Opportunity - Discover	RSF_OPP_DETAIL	Sales, Search Opportunities Select an opportunity, select the Discover tab	Enter information for the forecast summary.
Opportunity - Propose	RSF_OPP_PROPOSE	Sales, Search Opportunities Select an opportunity, select the Propose tab	Include an opportunity in the forecast.
Copy Products to Forecast	RSF_OPP_COPYFCAST	Access the Opportunity - Propose page. Click the Create Forecast button.	View and verify products to copy to forecasts.
Distribute Recurring Revenue	RSF_OPP_DISTRIB	Click the Distribute link from the Recurring tab of the Copy Products to Forecast page.	Enter recurring revenue.
Send to EIM	RSF_SENDTO_EIM_SEC	Access the Opportunity - Propose page. Click the Compensate Selected button.	Send forecast information to PeopleSoft Enterprise Incentive Management.

Using the Forecast Summary

If you want to include an opportunity's revenue on a forecast, but don't want to specify the actual products, you can use the Forecast Summary section on the Opportunity - Discover page. Access the Opportunity - Discover page.



Opportunity - Discover page

Forecast

Select to include this opportunity in generated forecasts. When you save the page, the system copies the estimated revenue into the Forecast Amount field on this page, and it adds the opportunity in the Forecast section of the Opportunity - Propose page.

Type

If you select Forecast, you must select the type of forecast use.

Define forecast types on the Sales Forecasts page.

See Chapter 5, "Setting Up Sales Forecasts," Defining Forecast Types, page 69.

Est. Revenue (estimated revenue)

Enter the amount of revenue that is anticipated from the sale.

Currency

Enter the currency code for the revenue. The default currency code is the code that is associated with the sales user on the Sales User page.

If no products are associated with the lead, you can override the default currency code. Doing so changes the currency here and on the Product page.

Confidence % (confidence percentage)

Displays the average degree of confidence (expressed as a percentage) that the assigned sales representatives feels that the opportunity will result in a closed sale.

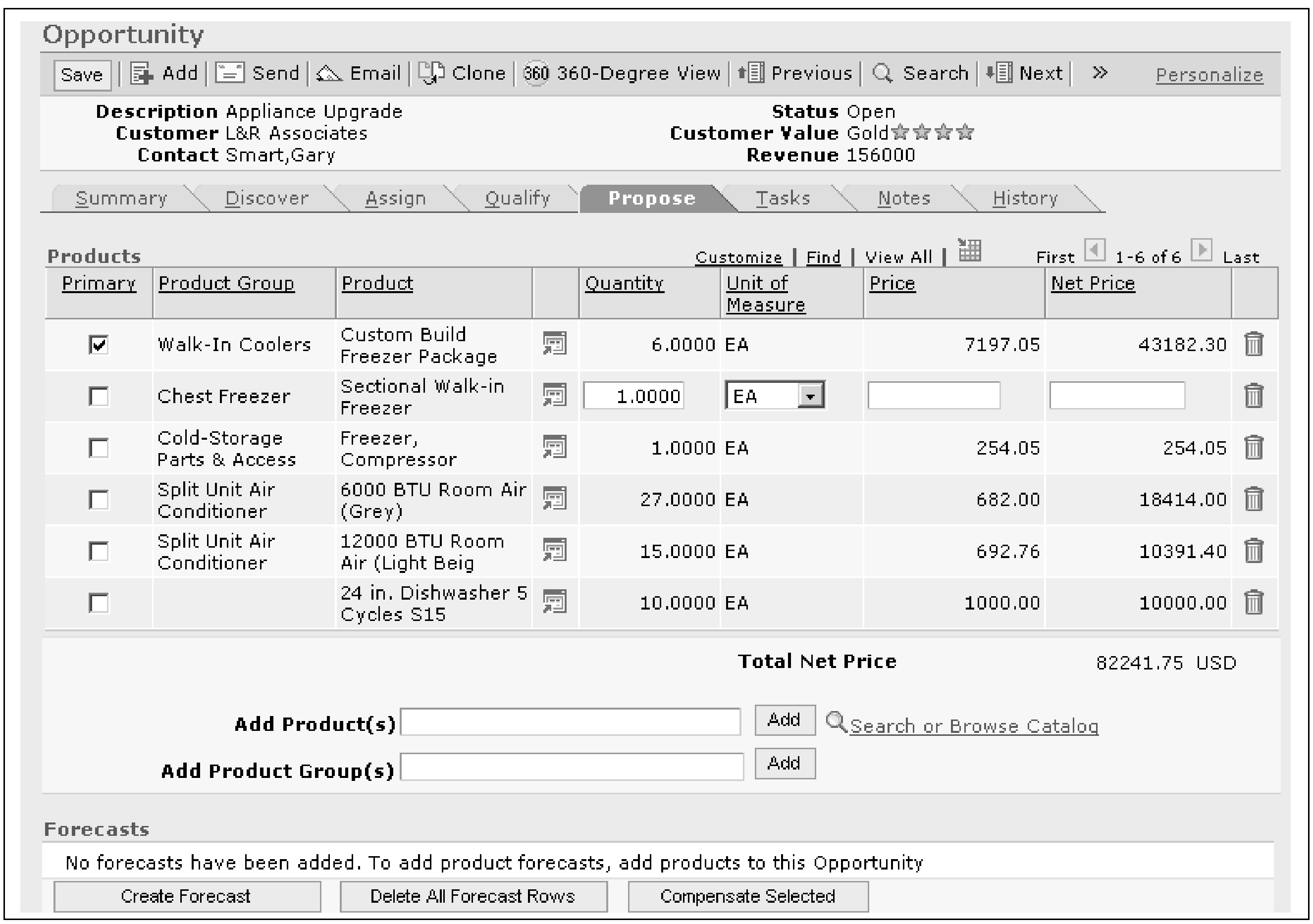
The system calculates the average of all confidence percentages that are entered for the opportunity in the Forecast section of the Opportunity - Propose page.

For example, if there are three products identified for forecasting from this opportunity—the first with a confidence of 70 percent, the second with 80 percent, and the last with 90 percent—the system calculates the average, as follows: (70 + 80 + 90) ÷ 3 = 80. The system displays the result here.

	If you do not enter forecast rows on the Opportunity - Propose page, you can manually enter the confidence percent here.
Close Date	Enter a date that the system uses to determine whether to include the opportunity in the pipeline or forecast based on the time period that is specified for that pipeline or forecast.
Forecast Amt (forecast amount)	If you select the Forecast check box, a forecast amount must be specified. There are two ways that this can happen: • If the opportunity is not yet forecast and you select the Forecast check box, then the system copies the estimated revenue amount into this field when you save the page. You can override this value. • You can enter the forecast amount.
Create Forecast	Click this link to create a forecast on the Opportunity - Propose page.

Copying Products to Forecast

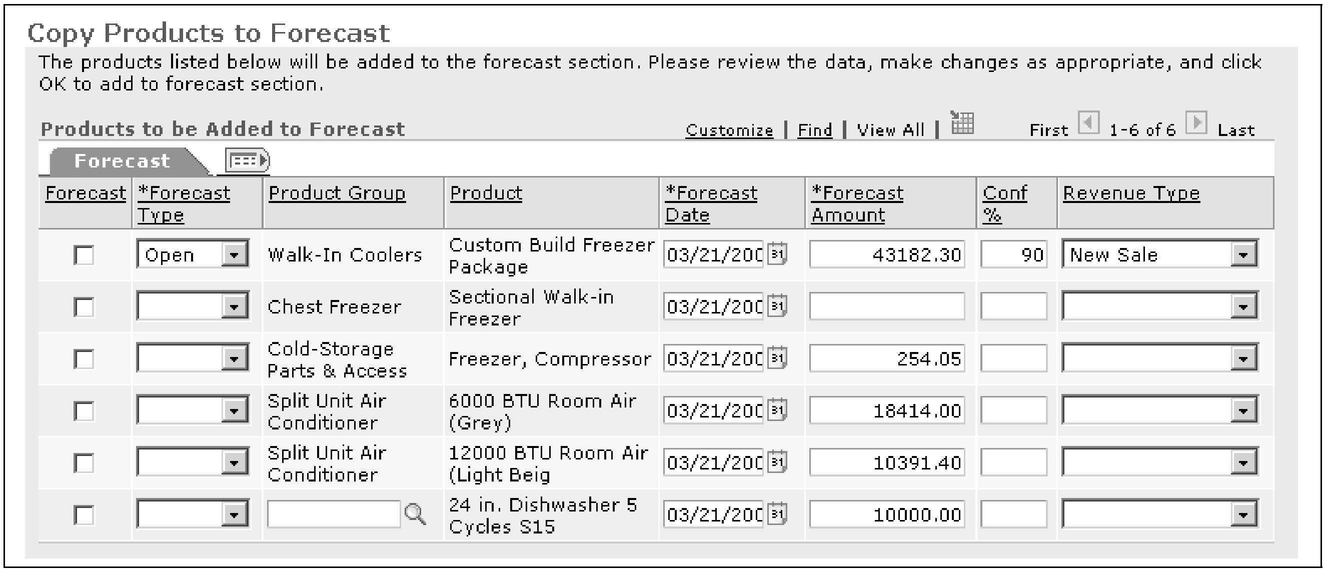
If you want to include an opportunity's products on a forecast, you can copy the products to the Forecast section of the Opportunity - Propose page. Access the Opportunity - Propose page.



Opportunity - Propose page

Click the Create Forecast button to access the Copy Products to Forecast page.

Note. If there is existing forecast information when you click the Create Forecast button, the system displays the existing forecast on the Copy Products to Forecast page. You cannot copy products to the forecast if the forecast already exists for the products.


Copy Products to Forecast

The products listed below will be added to the forecast section. Please review the data, make changes as appropriate, and click OK to add to forecast section.

Products to be Added to Forecast   Customize | Find | View All | First 1-6 of 6 Last

Forecast

Forecast	*Forecast Type	Product Group	Product	*Forecast Date	*Forecast Amount	Conf %	Revenue Type
	Open	Walk-In Coolers	Custom Build Freezer Package	03/21/200	43182.30	90	New Sale
		Chest Freezer	Sectional Walk-in Freezer	03/21/200			
		Cold-Storage Parts & Access	Freezer, Compressor	03/21/200	254.05		
		Split Unit Air Conditioner	6000 BTU Room Air (Grey)	03/21/200	18414.00		
		Split Unit Air Conditioner	12000 BTU Room Air (Light Beig	03/21/200	10391.40		
			24 in. Dishwasher 5 Cycles S15	03/21/200	10000.00		

Copy Products to Forecast page

After you enter forecast information on the Copy Products to Forecast page and click OK, the system adds the information to the Forecast section of the Opportunity - Propose page.

Forecast Select this check box to include the revenue in the forecast.

Forecast Type Select a user-defined forecast type.

See Chapter 5, “Setting Up Sales Forecasts,” Defining Forecast Types, page 69.

Forecast Amount Enter a forecast amount.

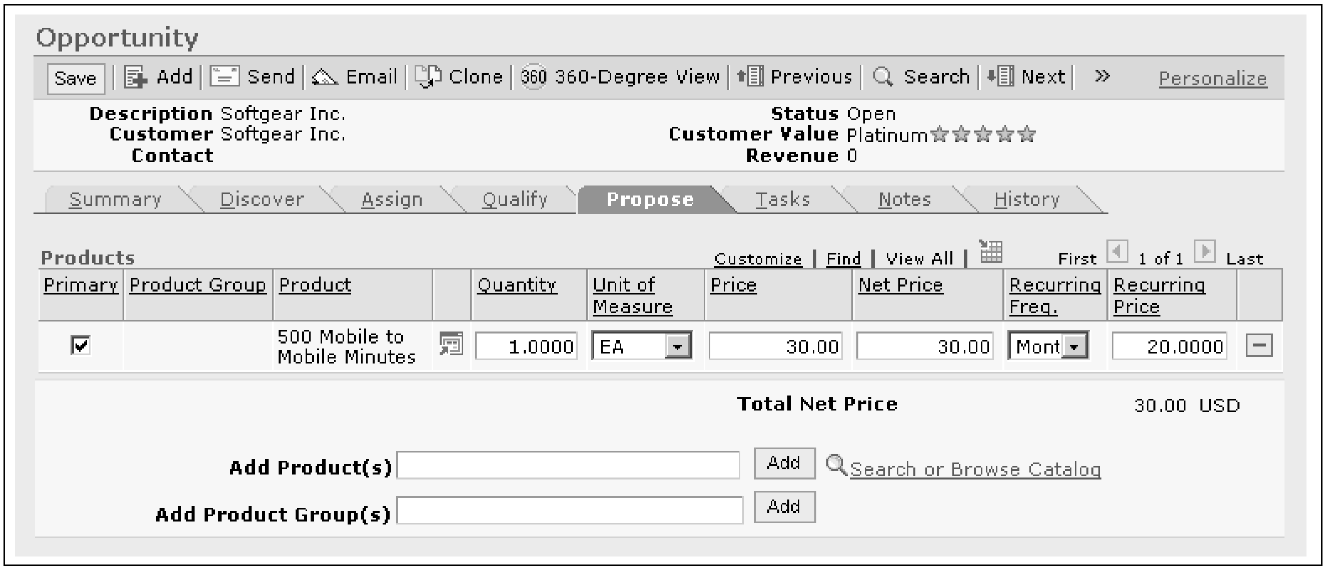
Confidence % (confidence percentage) Enter a whole number which specifies the probability that the forecast will became an actual sale.

Revenue Type Select a user-defined revenue type. This is an optional field.

See Chapter 5, “Setting Up Sales Forecasts,” Defining Revenue Types, page 69.

Using Recurring Forecasts

Access the Opportunity - Propose page.



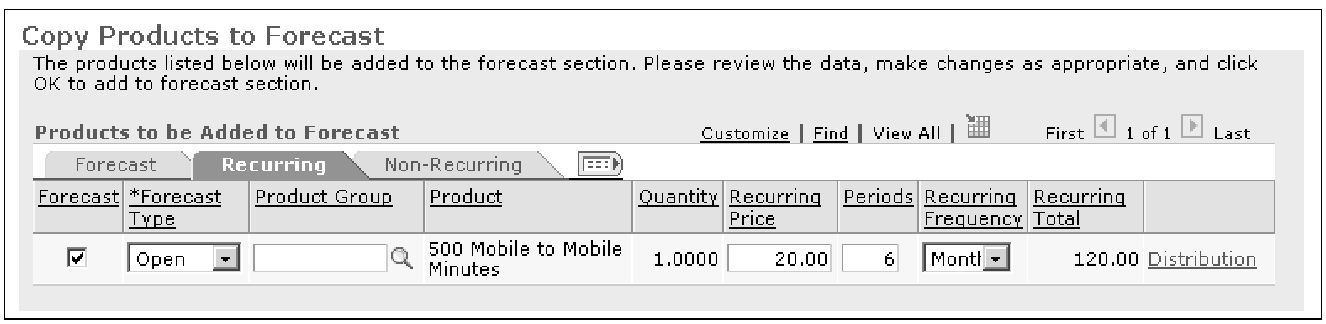
Opportunity - Propose page

If the product has recurring revenue, the system displays the following fields:

Recurring Freq. (recurring frequency) Select the period of time for the recurring revenue. Values are *Daily, Weekly, Monthly, Quarterly,* and *Yearly*.

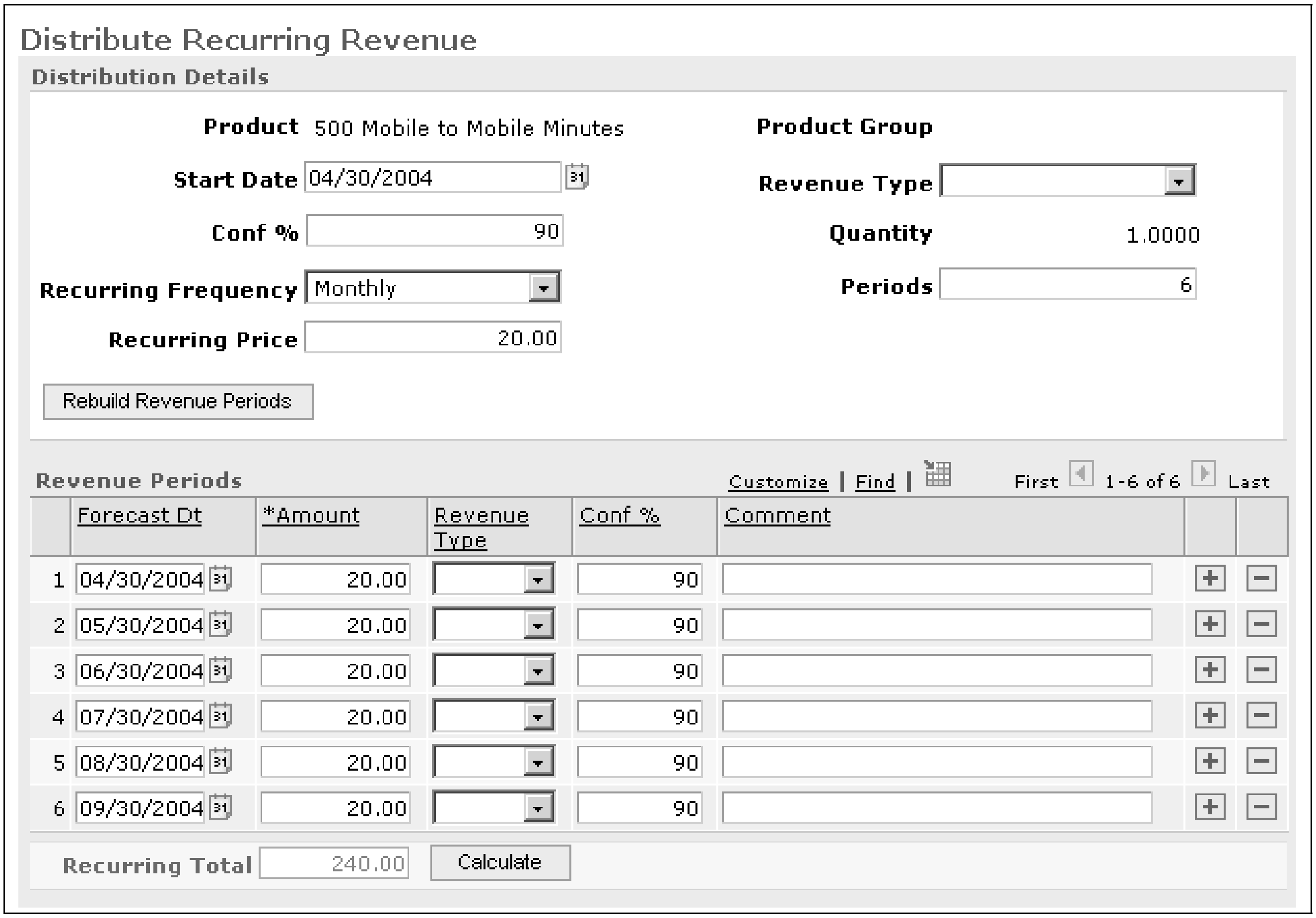
Recurring Price Enter the recurring revenue for each period of time.

To create a forecast for recurring revenue, click the Create Forecast button to access the Copy Products to Forecast page. Click the Recurring tab.



Copy Products to Forecast page: Recurring tab

Enter the forecast information, including the number of periods for the recurring revenue. You can click the Distribution link to access the Distribute Recurring Revenue page, where you can view or modify the distribution of recurring revenue over a period of time. If you do not access this page, but do select the Forecast check box, the system populates the Forecast grid on the Opportunity - Propose page with recurring revenue based on the values specified on the Recurring tab.

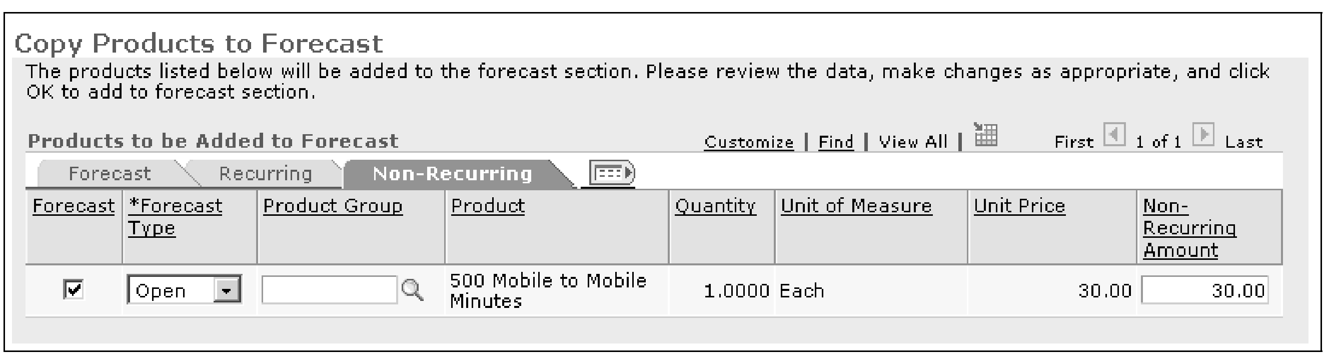


Distribute Recurring Revenue page

Make any changes in the Distribution Details section and then click the Rebuild Revenue Periods button to refresh the data in the Revenue Periods section. The system populates the first forecast date with the Start Date and then creates additional forecast dates based on the Recurring Frequency. Click the Calculate button to generate a value for the Recurring Total.

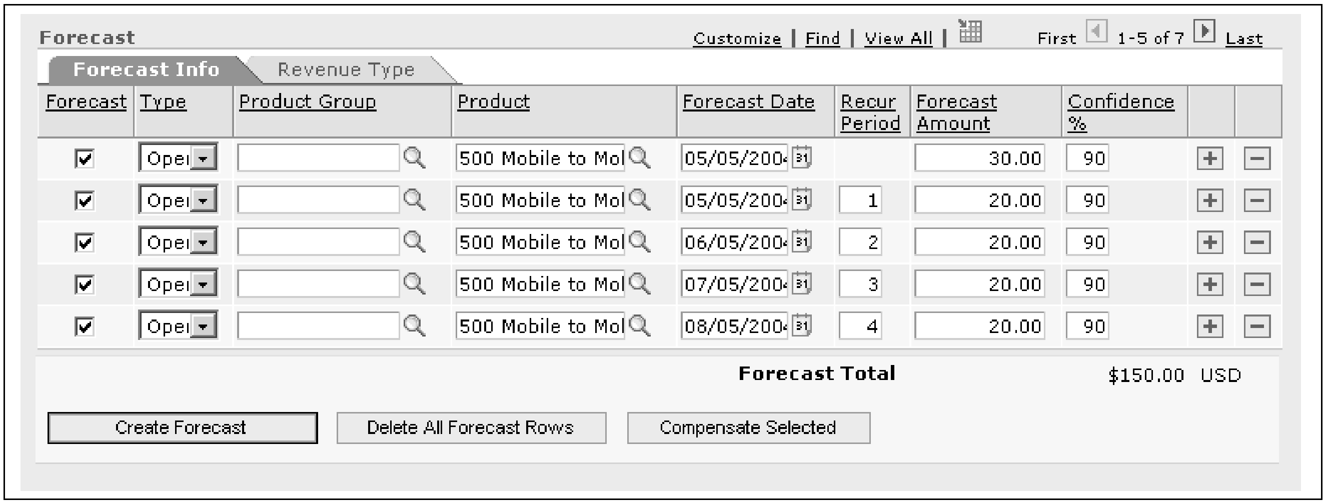
If you change the forecast amount, then on your return to the Recurring tab of the Copy Products to Forecast page, the system displays a Review link, instead of the original Distribute link, as a reminder that manual changes have occurred.

To enter non-recurring revenue, select the Non-Recurring tab of the Copy Products to Forecast page.



Copy Products to Forecast page: Non-Recurring tab

The system populates the Forecast section of the Opportunity - Propose page with both the recurring and nonrecurring revenue. The nonrecurring revenue does not have a value in the Recur Period field. This section contains the data that system populates on the Forecast page when a sales representative uses the Add Forecast component, or when a sales manager uses the Search Forecasts component to autoforecast.

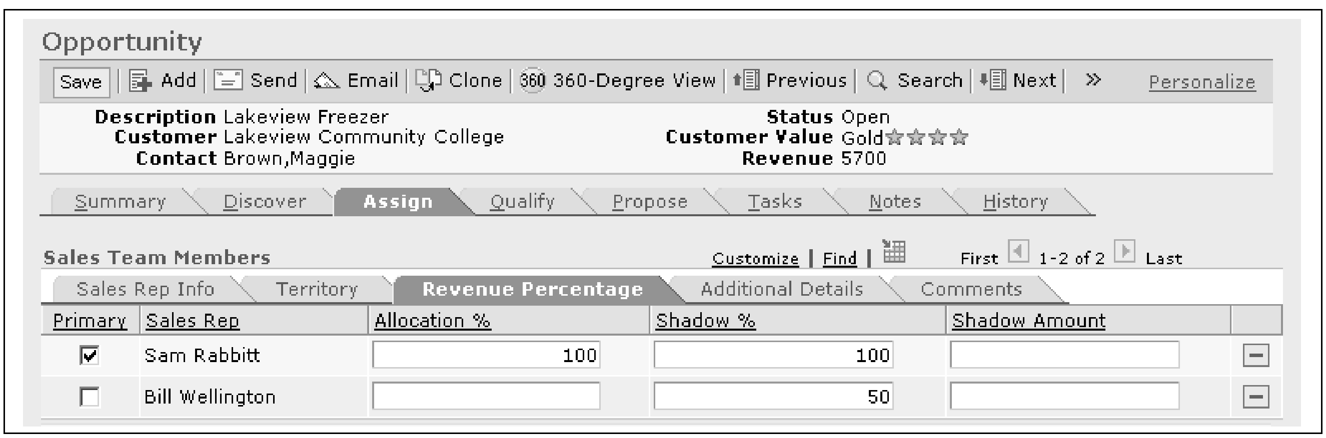


Opportunity - Propose page: Forecast section

Specifying Revenue Percentages for Forecasting

Access the Opportunity - Assign page. Select the Revenue Percentage tab.

Note. The Revenue Percentage tab may be hidden in the Opportunities component, depending on the user's access profile. Typically, only sales managers have access to this tab.



Opportunity - Assign page: Revenue Percentage tab

Note. Revenue allocations are required for the system to roll up an opportunity into pipelines and forecasts. Only opportunities can be rolled up into pipelines and forecasts. You cannot include leads in pipelines and forecasts. Therefore, the Revenue Percentage tab appears in the Opportunity component only. There is no equivalent Revenue Percentage tab in the Lead component.

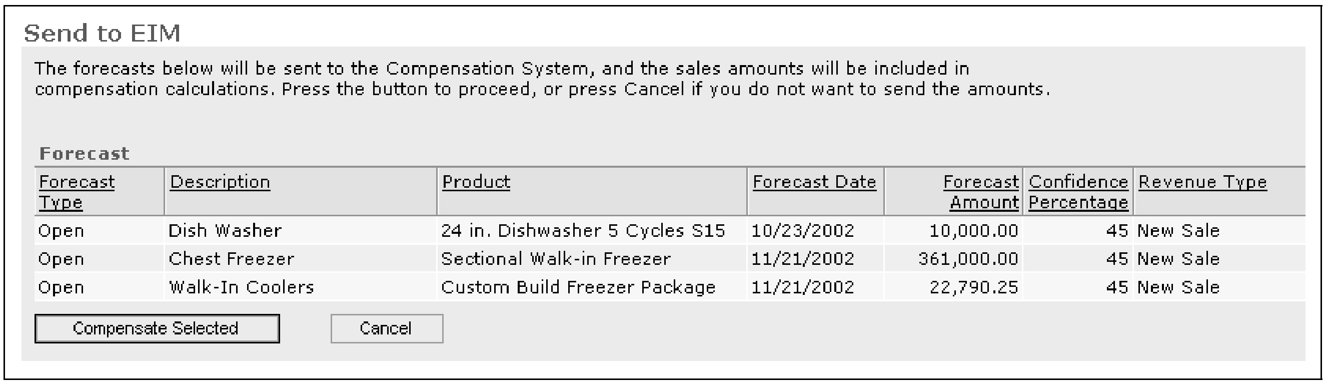
Allocation % (allocation percentage)	Enter the percentage of the total revenue to allocate to this member of the sales team for forecasting.

	Often, 100 percent of the revenue is allocated to the primary member of the sales team, but it can also be distributed across two or more members of the team. The sum of the allocation percentages must total 100 percent.
Shadow % (shadow percentage)	Enter the percentage of revenue that the individual is expected to earn. **Note.** The sum of the shadow percentages does not have to equal 100 percent.
Shadow Amount	Enter a lump sum amount that the individual is expected to earn.

Including Forecast Items in Compensation Calculations

Integrate PeopleSoft Enterprise Incentive Management with PeopleSoft Sales to include opportunity revenues in compensation calculations. You can set up a single signon between the two databases and exchange opportunity forecasting data between PeopleSoft Sales and PeopleSoft Enterprise Incentive Management.

Access the Send to EIM page.


Send to EIM

The forecasts below will be sent to the Compensation System, and the sales amounts will be included in compensation calculations. Press the button to proceed, or press Cancel if you do not want to send the amounts.

Forecast

Forecast Type	Description	Product	Forecast Date	Forecast Amount	Confidence Percentage	Revenue Type
Open	Dish Washer	24 in. Dishwasher 5 Cycles S15	10/23/2002	10,000.00	45	New Sale
Open	Chest Freezer	Sectional Walk-in Freezer	11/21/2002	361,000.00	45	New Sale
Open	Walk-In Coolers	Custom Build Freezer Package	11/21/2002	22,790.25	45	New Sale

Compensate Selected Cancel

Send to EIM page

Click the Compensate Selected button to send the forecasts to PeopleSoft Enterprise Incentive Management.

See *PeopleSoft Enterprise Incentive Management PeopleBook.*

Closing Opportunities

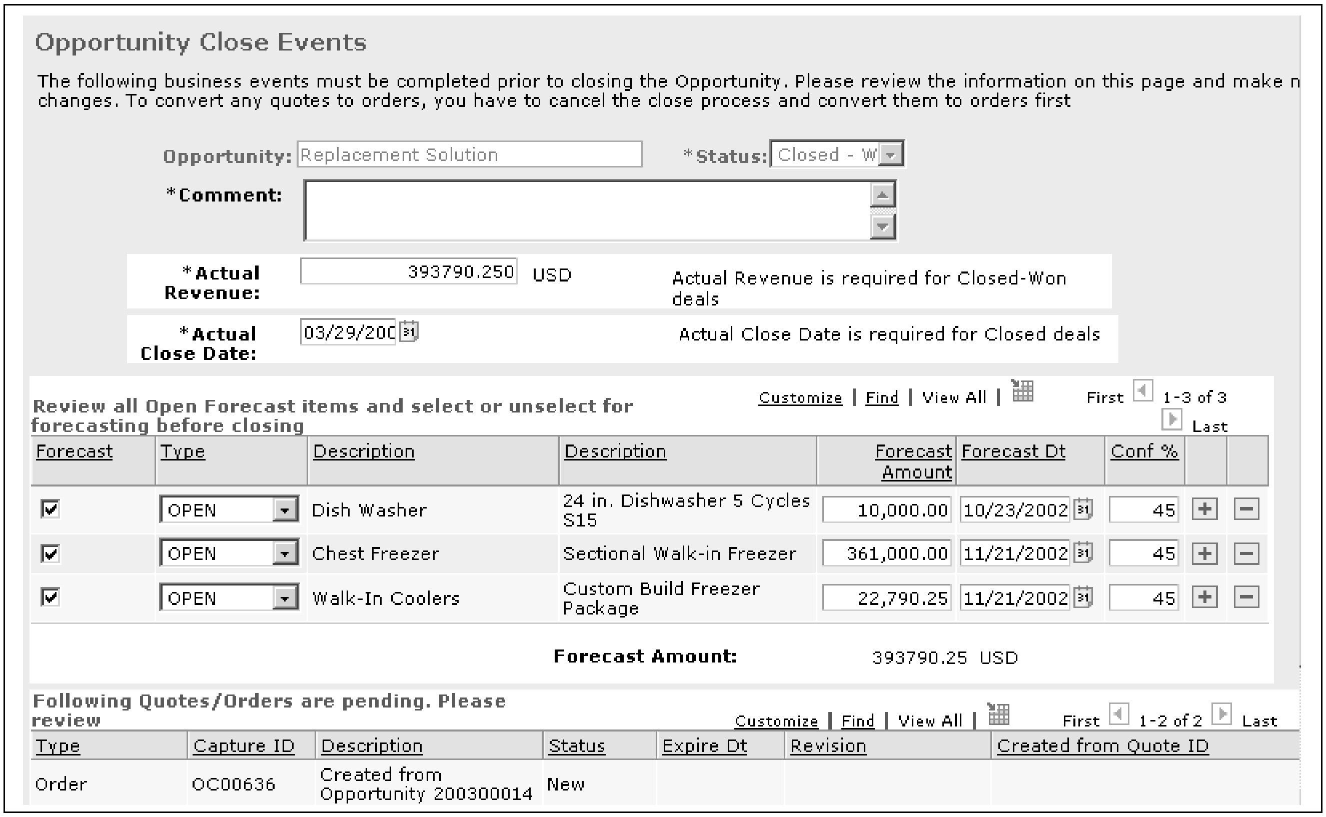
This section discusses how to close an opportunity after the customer has made a decision.

Page Used to Close Opportunities

Page Name	Object Name	Navigation	Usage
Opportunity Close Events	RSF_OPP_CLOSE_SEC	Access the Opportunity - Discover page. Select a status of *Closed - Won* or *Closed - Lost.* Click Save.	Close an opportunity.

Closing Opportunities

To close an opportunity, access the Opportunity - Discover page, and enter the appropriate value in the Status field. Values are *Closed - Won* and *Closed - Lost.* When you save the page, the Opportunity Close Events page appears.



Opportunity Close Events page

You must enter comments and other data here to close an opportunity successfully. Also, you must review the forecast items and either select or clear the Forecast check box to include them in the forecast or exclude them.

After you close the opportunity, the system displays the actual close date and actual revenue on the Close tab of the Opportunities List page for the opportunity.

Comment Enter a reason for the win or loss.

Actual Revenue Displays the actual revenue from the closed, won opportunities.

An actual revenue amount is required to close the opportunity successfully.

Actual Close Date Enter the close date; the system's current date is the default.

Forecast Select for each item that you want to include in forecasting from the closed opportunity. Be sure that the check box is cleared for all items that you do not want to include in forecasting.

Items from a closed, lost opportunity that have the Forecast check box selected appear in the pipeline as leaks. You can not forecast revenue for a Closed-Lost opportunity.

See Chapter 19, "Including Opportunities in Forecasts and Closing Opportunities," Including Opportunities in Forecasts, page 209.

PART 4

Using Forecasts

CHAPTER 20

Understanding Sales Forecasts

This chapter discusses:

- Forecasts.
- Revenue and shadow forecasts.

Forecasts

PeopleSoft Sales forecasts are estimates of future sales revenues based on current opportunities, their projected revenue estimates, closing dates, as well as other regional factors. If your access profile permits, you can edit forecast data and add rows to make adjustments to forecasts. For example, you might combine the forecasts of 10 team members to produce one roll-up forecast for the team. You can also view forecasts at a single summary level, and filter and sort summaries for better analysis.

You can generate forecast subtotals as well as charts to view forecasts graphically. You can also use the Combined Forecasts page and the standard download feature to export forecast data to financial modeling programs outside of your database.

PeopleSoft Sales enables you to configure forecasting to your organization's business processes and reporting period needs. Sales representatives can generate and view their own forecasts and submit them to management at the appropriate reporting times. Managers can generate forecasts for sales representatives that are visible to them on the territory tree. Senior managers can view an overall forecast of all their groups by generating one high-level roll-up forecast that provides a big picture view of where the organization stands.

In PeopleSoft Sales, sales representatives, managers, and financial analysts work with specific sets of data determined by their user access profiles and territory tree visibility. In this way, managers in one division have access to their staff's data but not to the data of another division.

PeopleSoft Sales forecasts are based on:

- The structure of sales territory trees.
- Opportunity details managed by sales representatives.
- Revenue and shadow forecast allocations, which reflect the percentages of opportunity activity attributed to each opportunity team member's forecast.

Revenue and Shadow Forecasts

PeopleSoft Sales provides two forecast variants, each with a different focus:

- *Revenue forecasts* are projections of an organization's opportunity activity from a financial perspective and provide guidance regarding the amount of revenue coming into the enterprise.

  A revenue forecast is based on the opportunity team's allocation percentage. Typically, 100 percent is allocated to one sales representative on an opportunity for the purpose of revenue forecasts. However, you can distribute the allocation percentage across two or more opportunity team members. The allocation percentage for an opportunity team must total 100 percent.

  Revenue forecasts are also known as *split revenues.* Revenue forecast amounts are calculated by multiplying the estimated revenue amount by the team member's allocation percentage.

- *Shadow forecasts* are projections of an organization's opportunity activity from an operational perspective and enable you to evaluate the performance of sales staff by comparing quotas to shadow revenue allocations.

  A shadow forecast is based on the opportunity team's shadow percentages. The shadow forecast is operational in nature. The shadow percentage for an opportunity team does not have to total 100 percent. In the event that the total is greater than 100 percent, the amount over 100 percent is double-counted.

  Shadow forecasts are also known as *double counts;* although, not every shadow forecast includes a double count. Shadow forecast amounts are calculated by multiplying the estimated revenue amount by the sales user's shadow percentage, then adding the shadow amount.

This table provides three examples that demonstrate some of the ways that you might assign revenue and shadow allocations between two representatives, SREP1 and SREP2, who are working on the opportunity, and how those allocations affect corresponding forecasts.

	Opportunity 1	**Opportunity 2**	**Opportunity 3**
Customer	Lakeview Community College	Grandma's Foods	MMA Property Management
Product Group	Air Conditioners	Freezers	Refrigerators
Forecast Amount	100,000 USD	600,000 USD	1,000,000 USD
Close Date	March 31, 2001	March 31, 2001	March 31, 2001
Revenue Allocation	SREP1 = 100 percent	• SREP1 = 50 percent • SREP2 = 50 percent	• SREP1 = 100 percent • SREP2 = 0 percent

	Opportunity 1	Opportunity 2	Opportunity 3
Shadow Allocation	SREP1 = 100 percent	• SREP1 = 50 percent • SREP2 = 50 percent	• SREP1 = 100 percent • SREP2 = 25 percent
Scenario and Forecast Results	One representative works the deal and gets all of the credit: • 100,000 USD appears on SREP1's Revenue forecast. • 100,000 USD appears on SREP1's Shadow forecast.	Two representatives work the deal and split everything equally: • 300,000 USD appears on SREP1's Revenue forecast. • 300,000 USD appears on SREP2's Revenue forecast. • 300,000 USD appears on SREP1's Shadow forecast. • 300,000 USD appears on SREP2's Shadow forecast.	SREP1 owns the deal. SREP2 helps out and gets partial shadow credit: • 1,000,000 USD appears on SREP1's Revenue forecast. • 0 USD appears on SREP2's Revenue forecast. • 1,000,000 USD appears on SREP1's Shadow forecast. SREP1 gets full credit towards his or her quota. • 250,000 USD appears on SREP2's Shadow forecast. SREP2 gets partial credit towards his or her quota for assisting with the deal.

CHAPTER 21

Using Forecasts

This chapter provides an overview of using forecasts and discusses how to:

- Select a forecast.
- Add and adjust forecasts.
- Autogenerate forecasts.
- Manage forecasts.
- Inactivate and lock forecasts.
- Archive and restore forecasts.

Understanding Forecast Functionality in PeopleSoft Sales

PeopleSoft Sales offers forecast functionality for two different groups of users:

- Sales representatives can add a new forecast or adjust their own forecasts using the Add Forecasts component.
- Sales managers can roll up, adjust, and analyze forecasts using the Search Forecasts component.

These two components use a similar interface to select a forecast.

Often, a sales manager asks all the sales representatives to create and adjust forecasts by a certain date. When the sales representatives are comfortable with their forecast numbers, they submit their forecasts. Another option is to have sales representatives update their opportunities, for example, by the last day of each month, and then use autoforecasting to build forecasts directly from the opportunities. In either case, the sales managers can roll up forecasts for all their sales representatives and analyze the forecast for a territory. The forecasts that roll up under a manager depends on the structure of the territory tree.

Selecting a Forecast

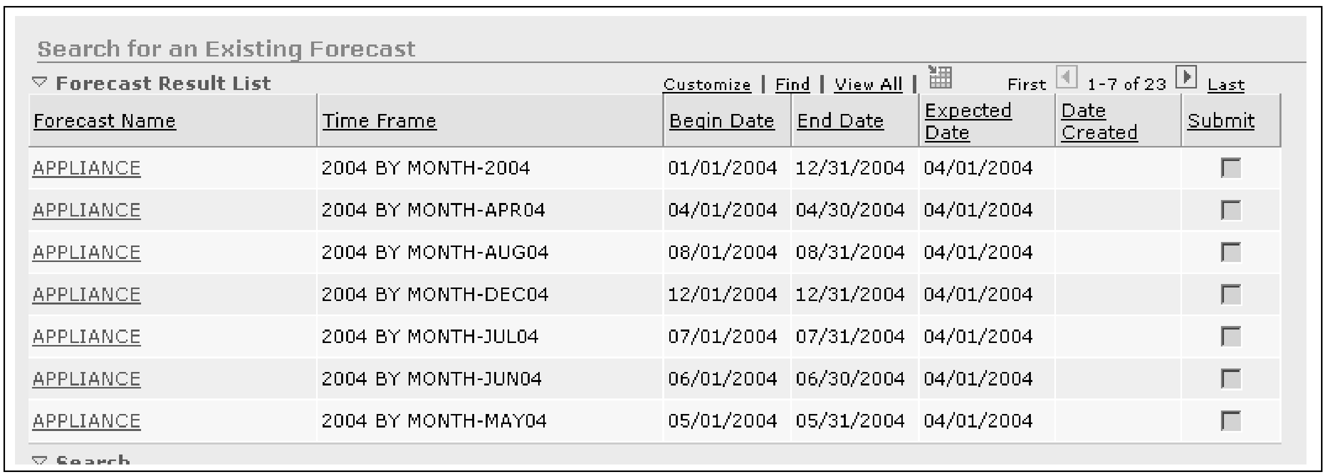
This section discusses how to select a forecast.

Pages Used to Select a Forecast

Page Name	Object Name	Navigation	Usage
Search for an Existing Forecast	RSF_FCAST_SEARCH	Sales, Search Forecasts	View a list of revenue or shadow forecasts. You can select a forecast to view in more detail.
Search for an Existing Forecast	RSF_FCAST_R_SEARCH	Sales, Add Forecasts	View a list of revenue forecasts, shadow forecasts, and empty forecasts. You can select a forecast to view in more detail or select an empty forecast to use in generating a new revenue forecast.

Viewing Forecast Lists

Access the Search for an Existing Forecast page.

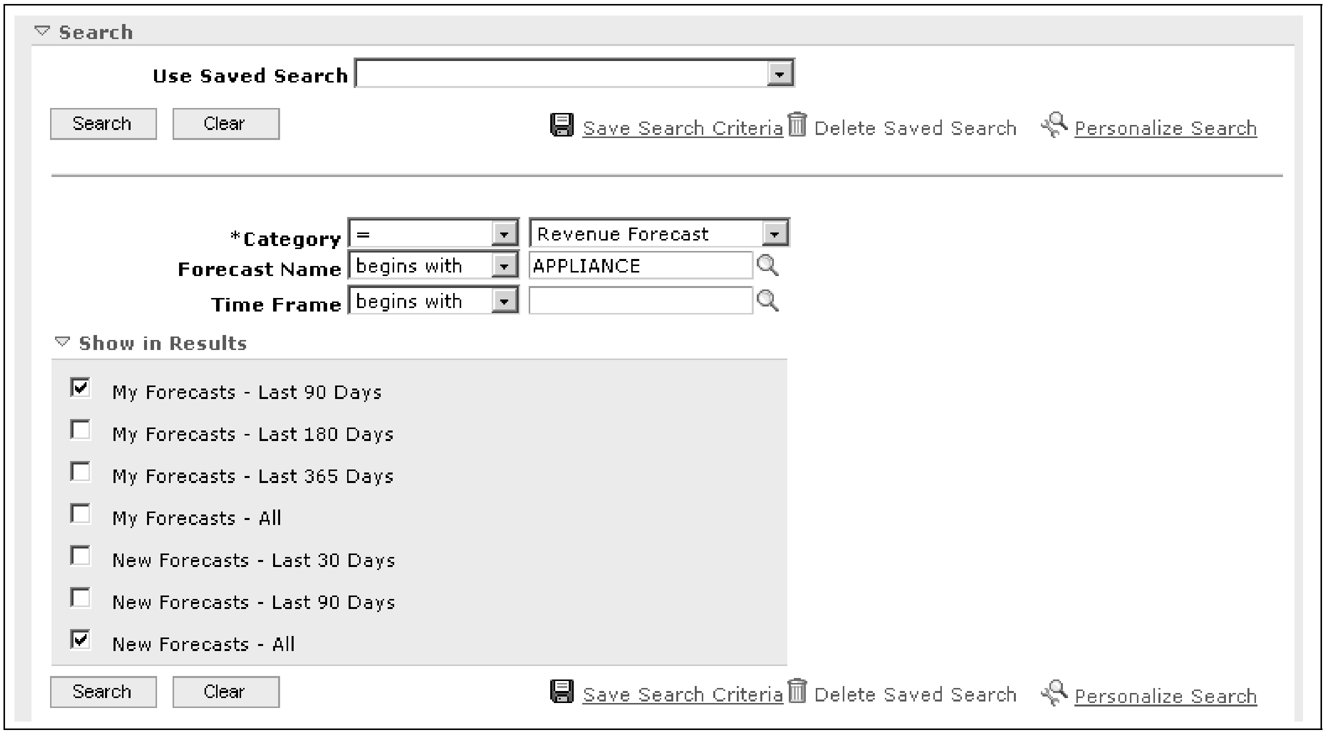

Search for an Existing Forecast

Forecast Result List — Customize | Find | View All | First 1-7 of 23 Last

Forecast Name	Time Frame	Begin Date	End Date	Expected Date	Date Created	Submit
APPLIANCE	2004 BY MONTH-2004	01/01/2004	12/31/2004	04/01/2004		
APPLIANCE	2004 BY MONTH-APR04	04/01/2004	04/30/2004	04/01/2004		
APPLIANCE	2004 BY MONTH-AUG04	08/01/2004	08/31/2004	04/01/2004		
APPLIANCE	2004 BY MONTH-DEC04	12/01/2004	12/31/2004	04/01/2004		
APPLIANCE	2004 BY MONTH-JUL04	07/01/2004	07/31/2004	04/01/2004		
APPLIANCE	2004 BY MONTH-JUN04	06/01/2004	06/30/2004	04/01/2004		
APPLIANCE	2004 BY MONTH-MAY04	05/01/2004	05/31/2004	04/01/2004		

Search

Search for an Existing Forecast page (1 of 2)



Search for an Existing Forecast page (2 of 2)

Entering Search Parameters

Select filter options in the Show in Results group box. When you click Search, the system lists the search results at the top of the page.

Category Select *Revenue Forecast* or *Shadow Forecast.*

My Forecasts Select any My Forecasts option to search for generated forecasts that contain forecast data for your sales user. These forecasts have an entry in the Date Created column.

New Forecasts Select any New Forecasts option to search for forecasts that are empty or do not have data for your sales user. Use these empty forecasts to generate a new forecast.

Note. The search results list does not separate the generated forecasts and the new forecasts. If you select options to display both types of forecasts, you can click the Date Created link to sort the empty forecasts from those that have data.

Viewing Generated Forecasts

Click the View Details button to access the Generate Revenue Forecast or Generate Shadow Forecast page to either view data for a generated forecast or enter data to generate a new forecast. If your access profile permits you to adjust forecasts and you have not submitted the forecast, you can also edit forecast data.

Description, Expected Forecast Date, Begin Date, and **End Date** Displays values from the corresponding generated forecast or new forecast template.

Forecast Date Identifies the date when the forecast was generated. New, not-yet-generated forecasts do not have forecast dates.

Submitted When selected, indicates that the forecast was submitted to manager visibility and its detail is not editable.

Selecting a New Forecast

Select the type of forecast to create from the items that begin with the words *New Forecast* in the Show in Results group box.

Note. When you search for new forecasts, the system displays combinations of forecast names and time frames. If you have defined a forecast name, but the system does not display it, check the expected start date and status of the forecast name.

See Chapter 5, "Setting Up Sales Forecasts," Defining Forecast Names, page 68.

Adding and Adjusting Forecasts

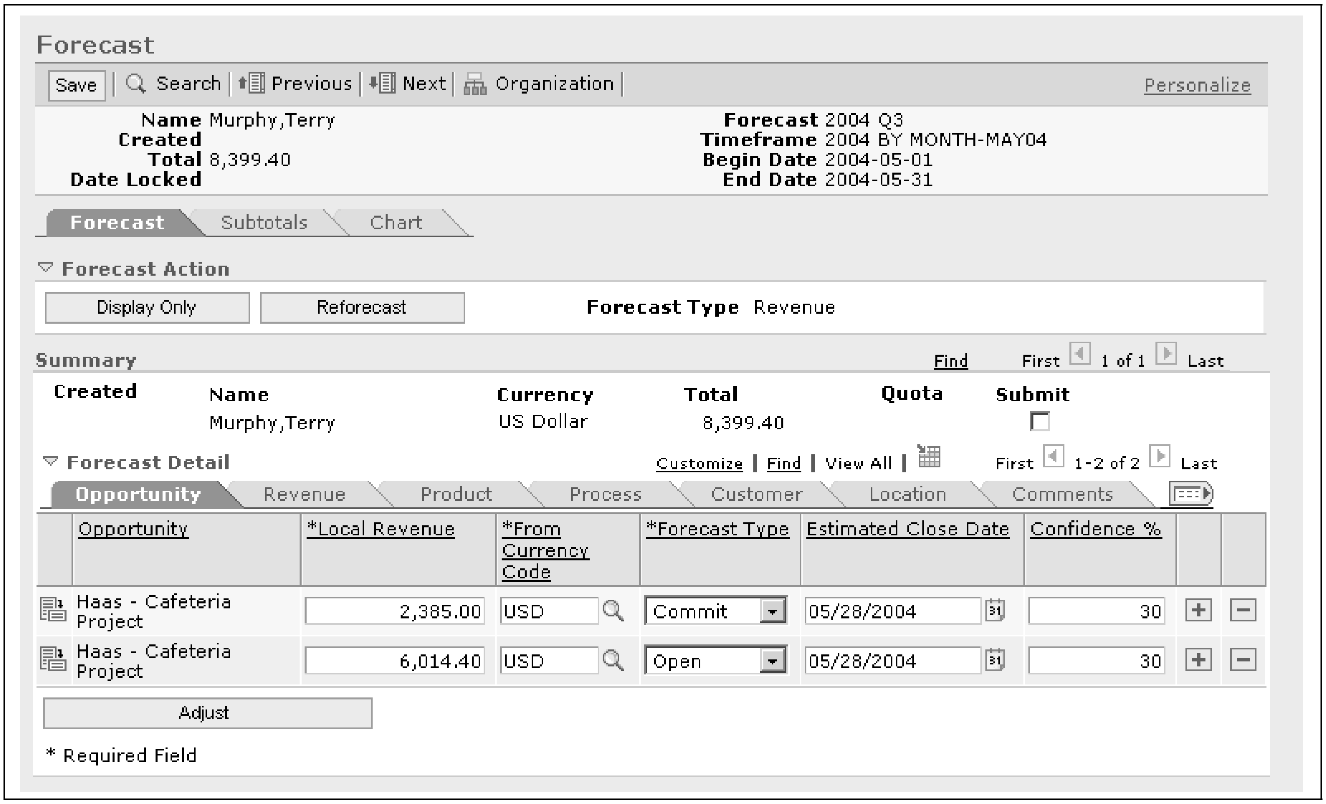
This section discusses how to add and adjust forecasts.

Pages Used to Add and Adjust Forecasts

Page Name	Object Name	Navigation	Usage
Forecast - Forecast	RSF_FCAST_ENTER	Sales, Add Forecasts Select a forecast.	Adjust a sales forecast that is based on an individual sales representative's revenue allocations for working opportunities.
Forecast - Subtotals	RSF_FCAST_SUMMARY	Sales, Add Forecasts Select a forecast. Select the Subtotals tab.	Calculate and view the subtotals of a revenue forecast.
Forecast - Chart	RSF_FCAST_CHART	Sales, Add Forecasts Select a forecast. Select the Chart tab.	Generate a chart of the revenue forecast.

Adding and Adjusting Sales Forecasts

Access the Forecast - Forecast page.



Forecast - Forecast page

This page displays the selected sales users' opportunities that have estimated close dates within the specified time frame and a status of either *Open* or *Closed - Won.* Forecasts do not include opportunities with the status *Closed - Lost* or *Inactive.*

You can view forecast data on each of the tabs on this page.

Edit Data and Display Only Click the Edit Data button to change into edit mode and enter and modify data. After you change to edit mode, the system renames the button to Display Only. You can return to display-only mode by clicking this button. The Edit Data button is enabled only if your access profile permits you to edit forecasts.

Reforecast Click to regenerate the forecast, which eliminates all modifications and adjustments and reruns the forecast based on current opportunity data. You cannot reforecast or make changes to a forecast once it is submitted.

Submit and **Submit All** Select to submit the forecast when you save the page. Submitting a forecast makes it available to managers. Managers can view all forecasts, submitted or not, if the sales access profile is set to permit viewing unsubmitted forecasts.

You cannot make changes to a forecast once it is submitted.

Note. Submit All appears only if your user profile permits you to submit multiple forecasts.

Local Revenue Enter the amount of revenue that is anticipated from the sale.

From Currency Code Enter the sales user's currency code.

Forecast Type Select a user-defined forecast type.

See Chapter 5, “Setting Up Sales Forecasts,” Defining Forecast Types, page 69.

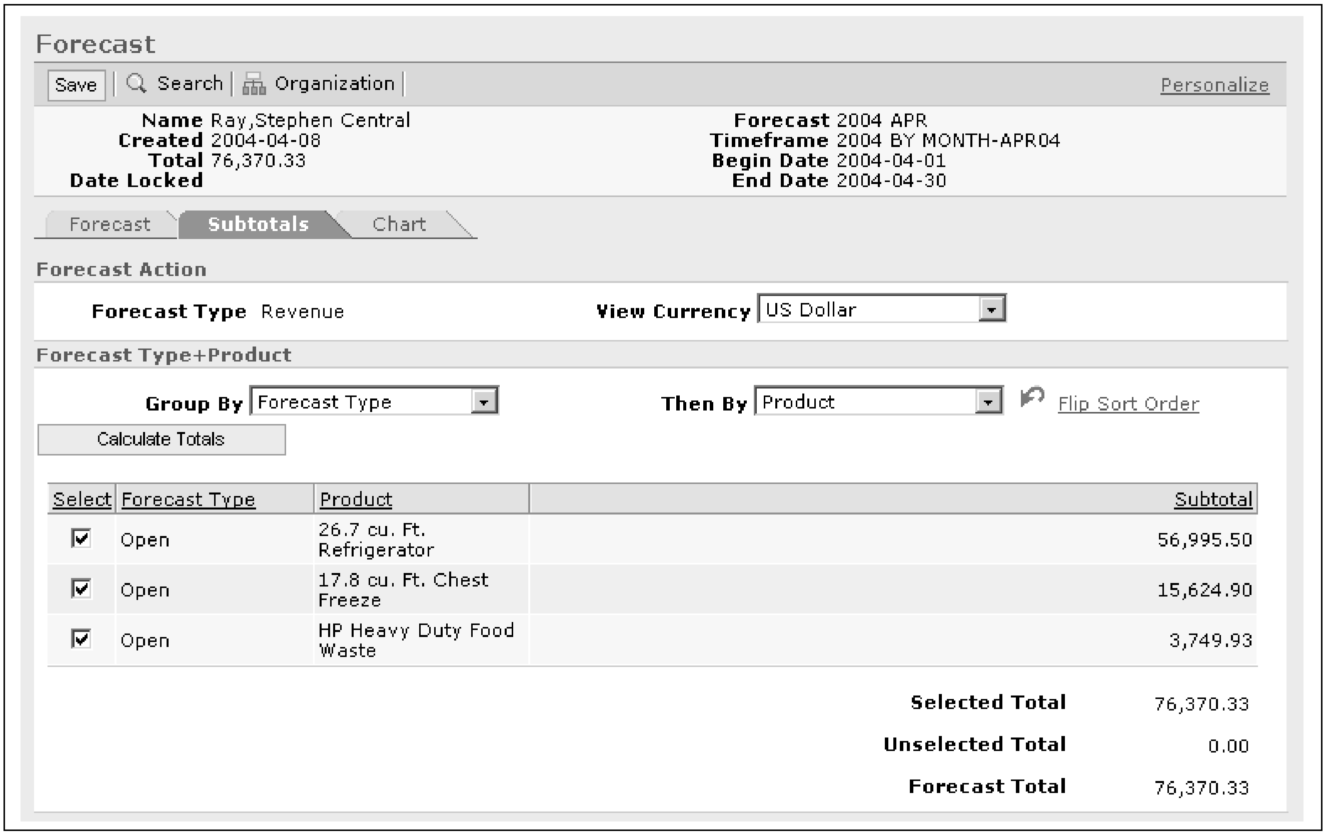
Estimated Close Date Enter the estimated date that the sales will occur.

Confidence % (confidence percentage) Enter a whole number which specifies the probability that the forecast will became an actual sale.

Adjust Click this button to add a row and make adjustments to the sales user’s forecast data. Adjustments affect the totals and are directly associated with the sales representative who makes the adjustment.

Calculating Forecast Subtotals

Access the Forecast - Subtotals page.



Forecast page: Subtotals tab

View Currency Select the currency in which to express the forecast amounts. The default is the sales user’s default currency.

Group By and **Then By** You can use subtotals to generate and view a forecast’s subsets. For example, suppose that the overall forecast is for November 2004 and you want to know the confidence levels that make up the forecast and you want to know those levels by region, then you would select *Confidence %* for Group By and *Region* for Then By.

Note. You must enter a value in the Group By field to use subtotals.

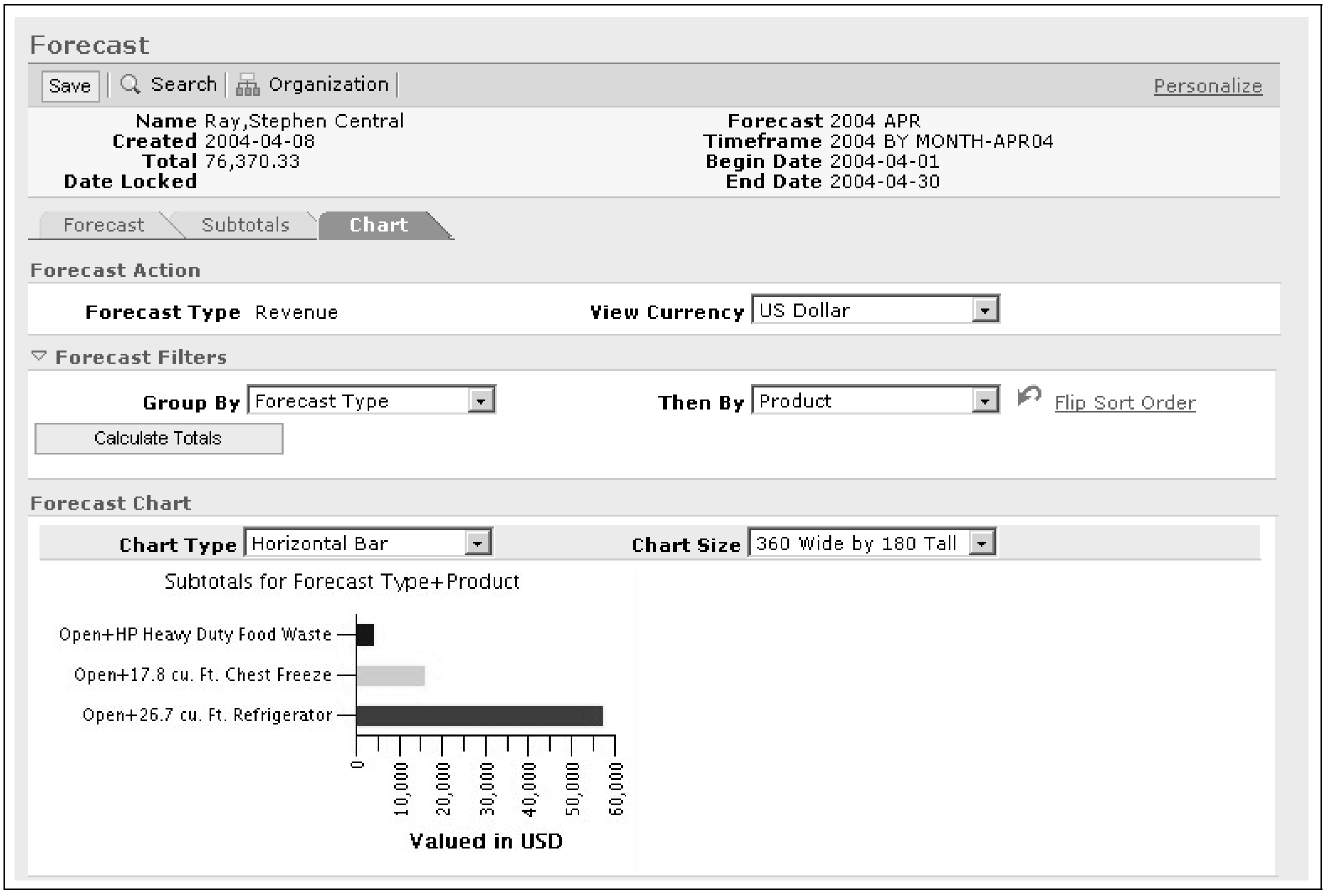
Select

Select the check box next to each item that you want to group into a separate subtotal. The sum for the selected items appears as the selected total, and the sum of items that are not selected is the unselected total.

For example, if there are ten rows and you select this check box for the first, third, and fifth rows, the selected total is the sum of the first, third, and fifth rows. The unselected total is the sum of the seven rows that you did not select.

Generating Forecast Charts

Access the Forecast - Chart page.



Forecast - Chart page

View Currency

If you specified the currency on the Subtotals page, the system carries it over to here. If not, specify it here.

Group By and **Then By**

If you specified subtotals on the Subtotals page, the system carries them over to here. If not, specify them here.

Note. You must have a Group By value to generate a chart.

Chart Type

Specify the type of chart to generate. Values include *Bar Chart, Horizontal Bar Chart, Horizontal Stacked Bar Chart*, and *Stacked Bar Chart.*

Chart Size

Specify the size of the chart.

Autogenerating Forecasts

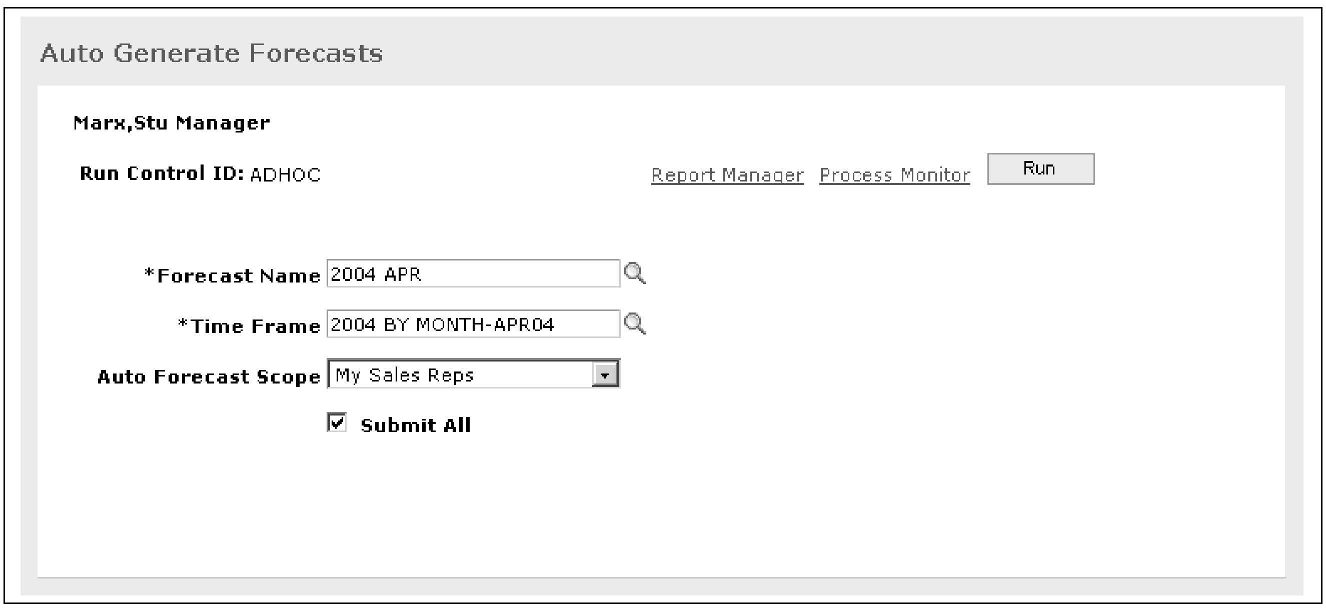
This section discusses how to automatically generate forecasts.

Page Used to Autogenerate Revenue or Shadow Forecasts

Page Name	Object Name	Navigation	Usage
Auto Generate Forecasts	RSF_FCAST_RUN	• Set Up CRM, Product Related, Sales, Forecast, Auto Generate Revenue Forecast • Set Up CRM, Product Related, Sales, Forecast, Auto Generate Shadow Forecast	Run the Auto Generate Forecast Application Engine process (RSF_FCST) to generate revenue or shadow forecasts for your direct reports or for all who are visible to you on the territory tree.

Autogenerating Forecasts

Access the Auto Generate Forecasts page.



Auto Generate Forecasts page

Forecast Name Enter the forecast to generate. You define forecasts on the Forecast Names setup page.

See Chapter 5, “Setting Up Sales Forecasts,” Defining Forecast Names, page 68.

Time Frame Enter the time frame from which to pull data for forecasting. Define forecast time frames on the Time Frames page.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Defining Holiday Schedules,” Defining Holiday Schedules, Time Frames, and Sales Quota Rollups.

Auto Forecast Scope	Select the data to forecast. Values are *My Sales Reps* (my sales representatives) and *All Sales Reps* (all sales representatives). Typically, sales managers can choose *My Sales Reps* to autogenerate forecasts for sales representatives to whom they have visibility. However, only sales or forecast administrators can choose *All Sales Reps* to autogenerate forecasts for the entire sales organization.
Submit All	Select to submit all of the autogenerated forecasts to manager visibility, in which case the sales representative cannot modify the forecasts. When cleared, the forecasts remain unsubmitted and available for editing, adjusting, and reforecasting.

After running the autogenerate process, select the autogenerated forecasts from the Forecast page in the Search Forecasts component to review and adjust them. Autogenerated forecasts are useful for determining sales representatives' revenue activities at a given time. However, autogenerated forecasts might not represent a true picture of a reporting period unless you are sure that sales representatives updated their opportunities and revenue projections before you ran the process.

Note. You can also autogenerate forecasts from the Forecast page in the Search Forecasts component by clicking the Auto Forecast button there. When using the button on the Forecast page, the system lists the autogenerated forecasts on that page, where you can immediately view and adjust them.

Managing Forecasts

This section discusses how to:

- Select the forecast action.
- Roll up and analyze forecasts.
- Analyze forecast subtotals.
- View details of all forecasts.
- View forecast data on a chart.

Note. Usually, access to the Search Forecast component is limited to managers. Therefore, these menu options and page fields may not appear, depending on your access profile limitations.

See Chapter 3, "Setting Up Sales Security and Personalization," Setting Up Sales Access Profiles, page 12.

Note. The views available to the manager depends on the setting of the CORE_RSF_ FCAST_SIMPLE functional option.

See Chapter 3, "Setting Up Sales Security and Personalization," Setting Up Functional Options, page 24.

Pages Used to Manage Forecasts

Page Name	Object Name	Navigation	Usage
Forecast	RSF_FCAST_REVIEW	Sales, Search Forecasts Select *Manager Review* as the forecast view.	Manage and review forecasts.
Forecast	RSF_FCAST_ALLS	Sales, Search Forecasts Select *Combined Forecasts* as the forecast view.	Edit and review forecast details.
Forecast	RSF_FCAST_SUMMARY	Sales, Search Forecasts Select *Subtotals* as the forecast view.	Analyze forecast subtotals.
Select Columns to Display	RSF_FCAST_FILTER	Sales, Search Forecasts Select *Subtotals* as the forecast view. Select Set Filters.	Select filters for data to display for the subtotals view.
Forecast	RSF_FCAST_CHART	Sales, Search Forecasts Select *Chart* as the forecast view.	Display summary data on a chart.

Selecting the Forecast Action

Access the Forecast page.

Forecast View Select a view for the page. Possible values are *Charts*, *Combined Forecasts*, *Interactive Reports*, *Manager Review*, and *Subtotals*.

See Appendix A, "Understanding PeopleSoft Sales Interactive Reports," page 251.

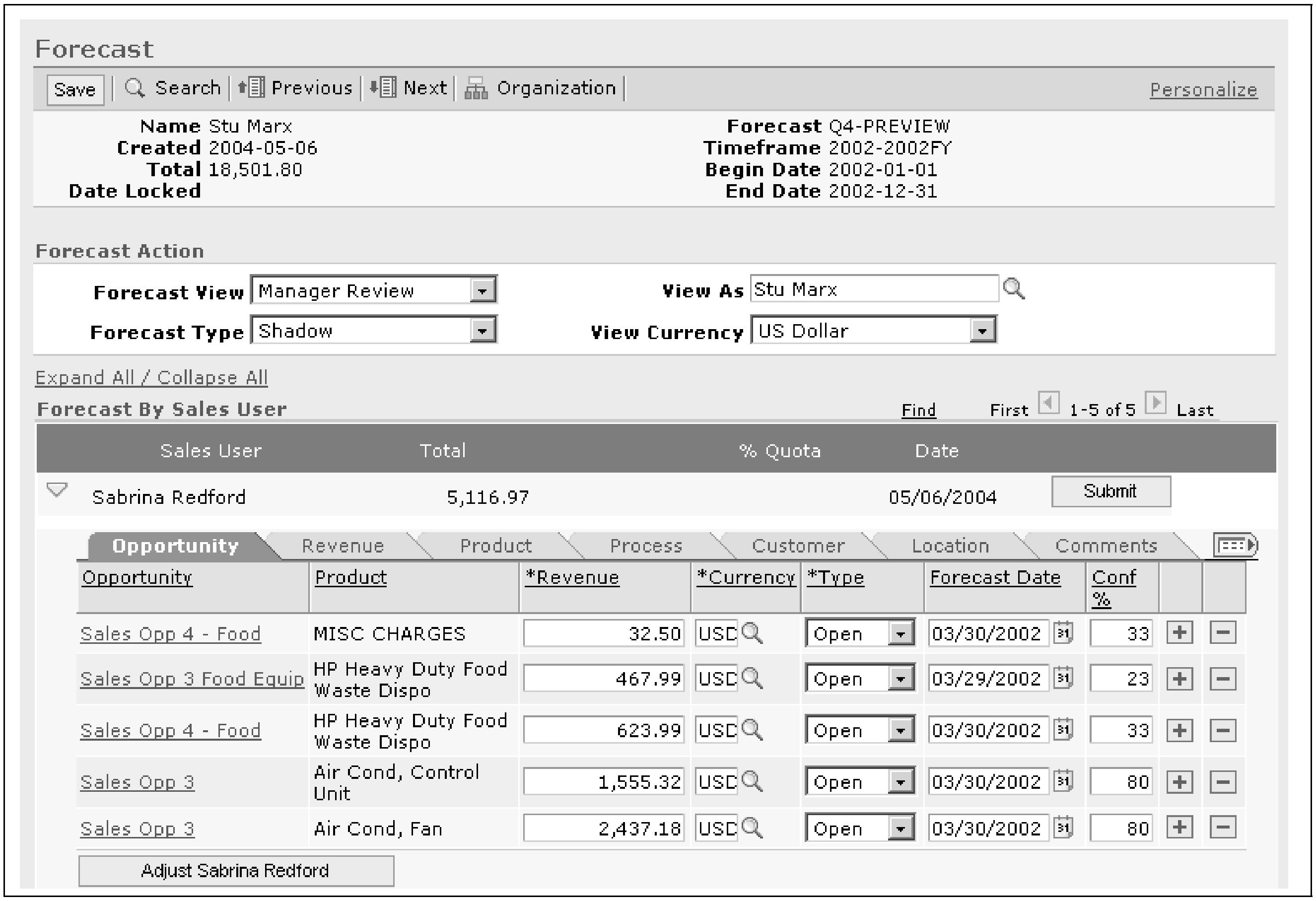
View As Enter a sales user for the forecast view.

Forecast Type Select either *Forecast* or *Shadow*.

View Currency Select the currency in which to express the forecast amounts. The default is the sales user's default currency.

Rolling Up and Analyzing Forecasts

Access the Forecast page.



Forecast page (1 of 2)

Forecast page (2 of 2)

Select *Manager Review* as the forecast view.

Note. The system displays forecast amounts in the default currency of the sales user who accesses the forecast, not in the default currencies of the sales users whose forecasts appear listed.

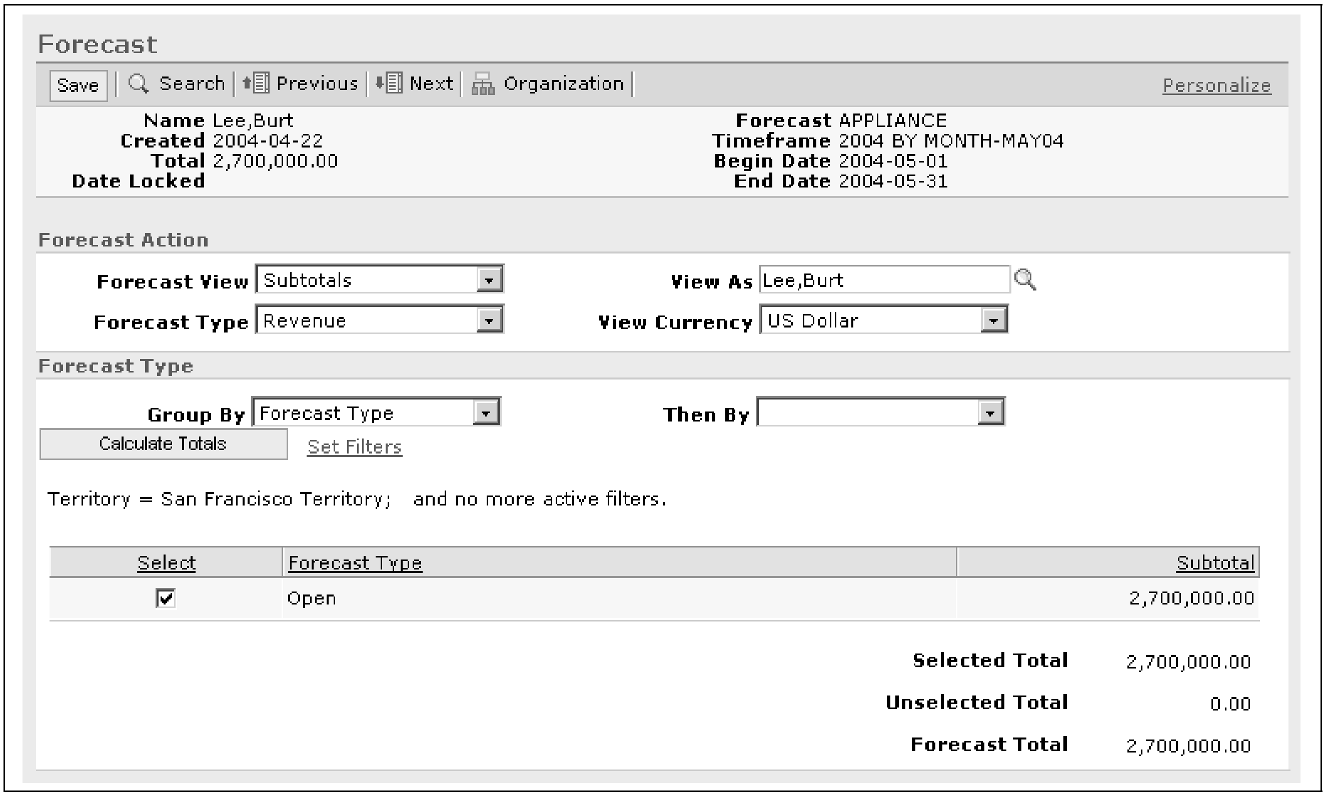
Expand All / Collapse All Click this link to display forecast details and view or adjust data for all sales users who are listed on the page. If the details are being displayed, click this link to hide forecast details for all sales users.

Note. You can display or hide the details for an individual sales user by clicking the triangle next to the user.

Submit	Click this button for each forecast that you want to submit. After you have submitted the forecast for a sales user, the Submit button becomes unavailable and changes to Submitted. A submitted forecast cannot be edited.
Revenue	Enter the amount of revenue that is anticipated from the sale.
Currency	Enter the currency code.
Forecast Type	Select a user-defined forecast type. See Chapter 5, “Setting Up Sales Forecasts,” Defining Forecast Types, page 69.
Forecast Date	Enter the estimated date that the sales will occur.
Conf % (confidence percentage)	Enter a whole number which specifies the probability that the forecast will became an actual sale.
Adjust <sales user>	Click this button to add a row and make adjustments to a particular sales user’s forecast data if it has not previously been submitted.
Auto Forecast	Click to generate a forecast for each direct report who has opportunity activity but does not already have a forecast listed. You cannot autogenerate the same forecast for an individual more than once.
Submit All	Click to submit all forecasts. You cannot edit forecasts after they have been submitted.
Manager Adjustments	Click this button to add a row and make adjustments to the overall forecast total. The system inserts manager adjustments under the manager’s name.

Analyzing Forecast Subtotals

Access the Forecast page.



Forecast page

Select *Subtotals* as the forecast view.

Group By and **Then By**

You can use subtotals to generate and view a forecast's subsets. For example, suppose that the overall forecast is for November 2004 and you want to know the confidence levels that make up the forecast and you want to know those levels by region, then you would select *Confidence %* for Group By and *Region* for Then By.

Note. You must enter a value in the Group By field to use subtotals.

Calculate Totals

After you have selected the subtotal groupings, click this button to calculate the subtotals for the groupings.

Set Filters

Click this link to access the Select Columns to Display page, where you can filter the data to be displayed.

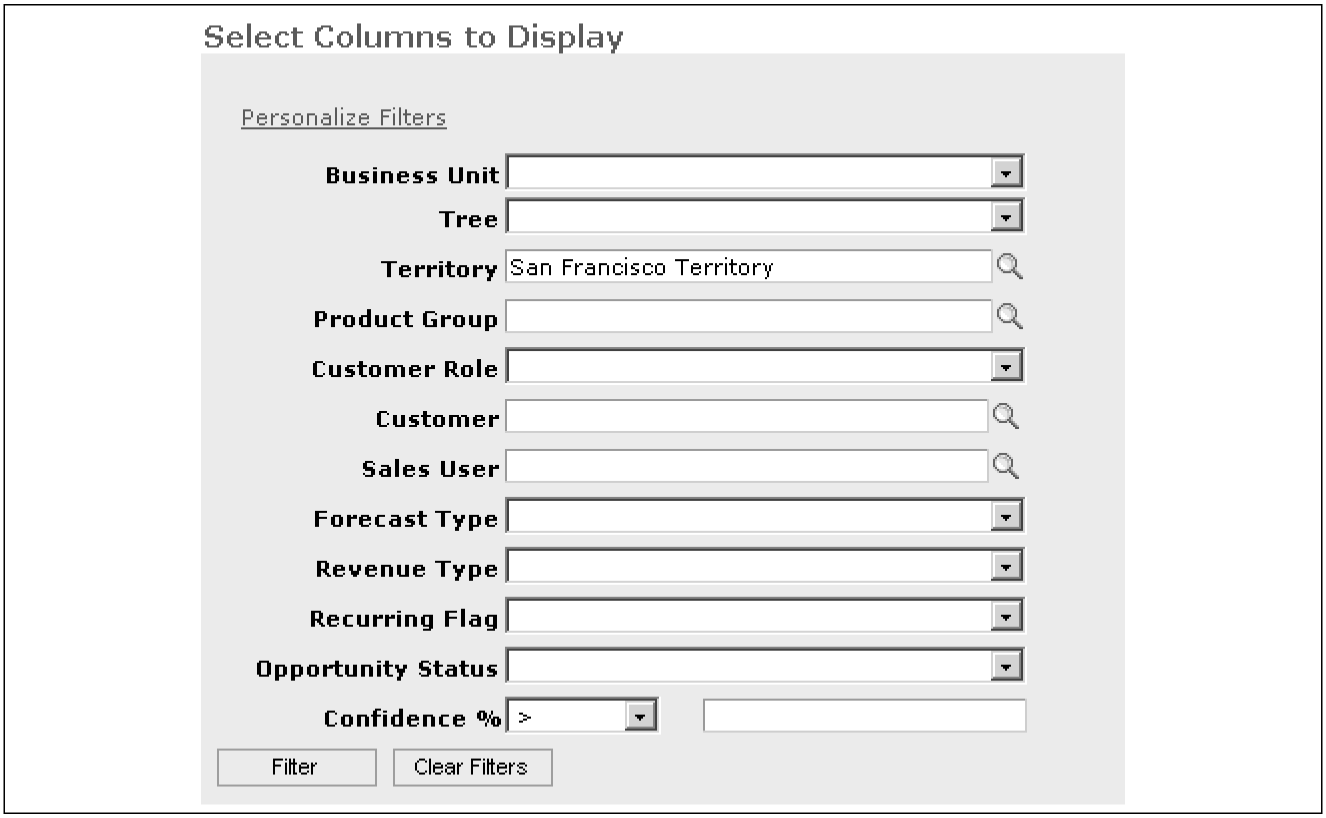
Select

Select the check box next to each item that you want to group into a separate subtotal. The sum for the selected items appears as the selected total, and the sum of items that are not selected is the unselected total.

For example, suppose that there are ten rows and you select this check box for the first, third, and fifth rows, the selected total is the sum of the first, third, and fifth rows. The unselected total is the sum of the seven rows that you did not select.

Filtering Data

Access the Select Columns to Display page.

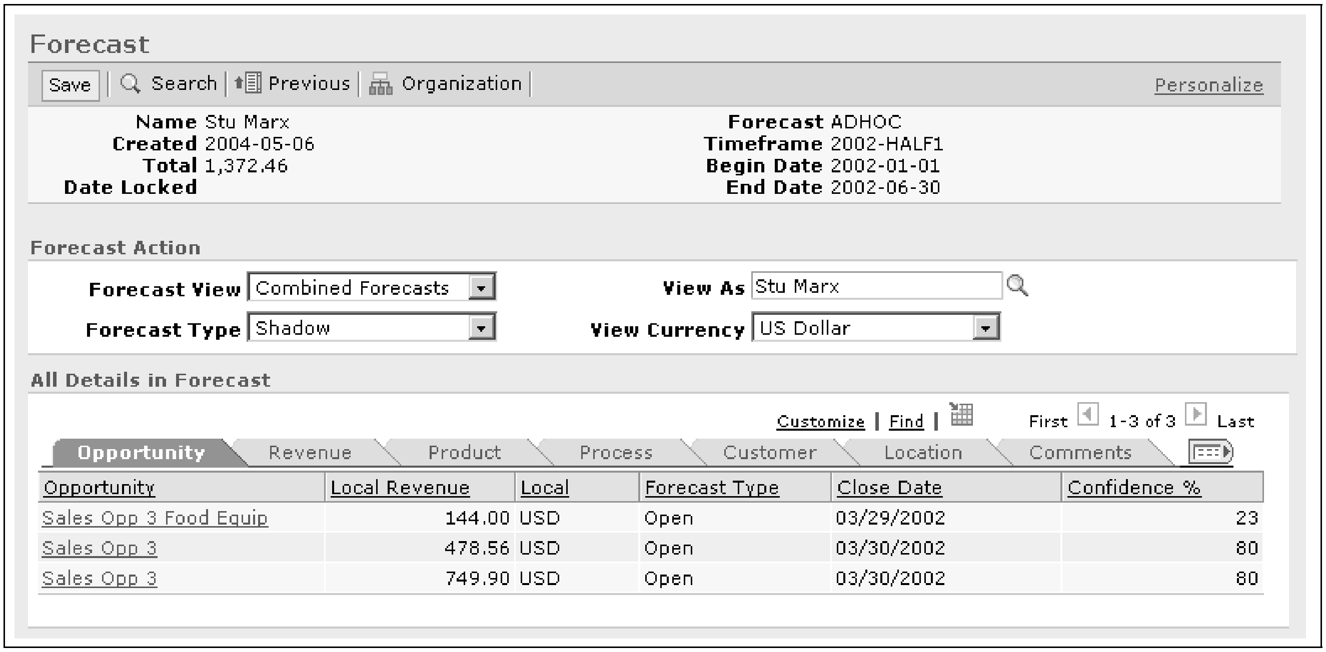


Select Columns to Display page

After you select values to use as filters for the data displayed for the subtotals view, click the Filter button to filter the data. You can personalize the filters used by clicking the Personalize Filters link.

Viewing Details of All Forecasts

Access the Forecast page.



Forecast page: Opportunity tab

Select *Combined Forecasts* as the forecast view.

This view enables the manager to see information for all the sales users' opportunities. The manager can sort the data to view, for example, the opportunities with the highest revenue. Also, the manager can click the Download button to download the opportunities to a spreadsheet.

Inactivating and Locking Forecasts

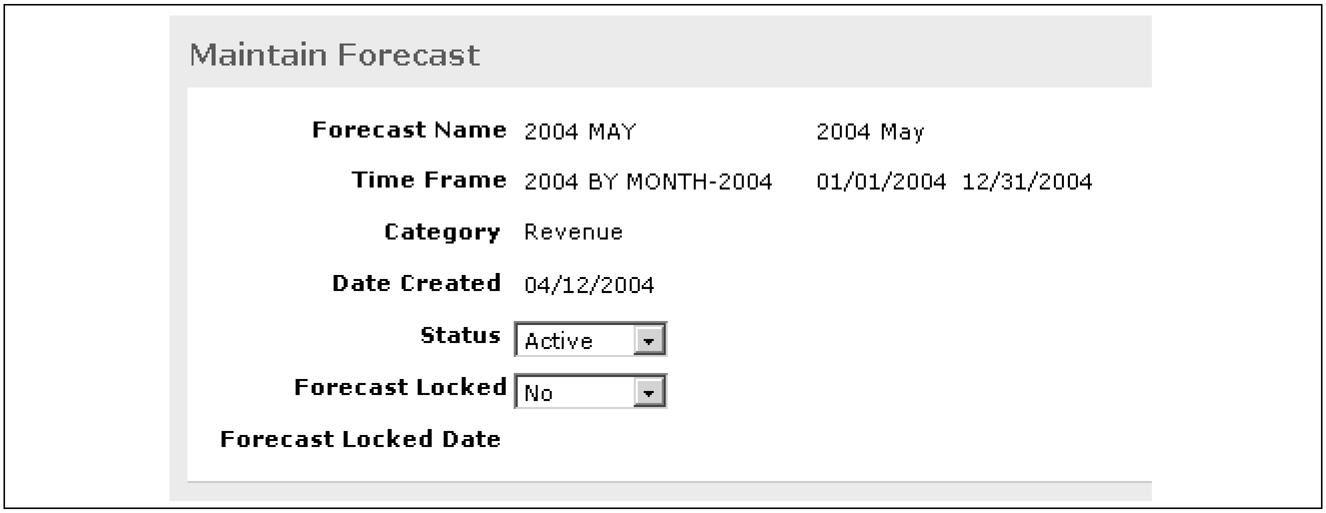
This section discusses how to inactivate and lock sales forecasts.

Page Used to Inactivate and Lock Forecasts

Page Name	Object Name	Navigation	Usage
Maintain Forecast	RSF_FCAST_MAINT	Set Up CRM, Product Related, Sales, Forecast, Lock Forecast	Inactivate and lock sales forecasts.

Inactivating and Locking Sales Forecasts

Access the Maintain Forecast page.



Maintain Forecast page

Warning! You cannot unlock a forecast once it is locked.

Status

Select *Inactive* to inactivate the forecast. You cannot access an inactive forecast except from the Maintain Forecast page. You cannot view an inactive forecast; include it in a forecast summary, roll-up, or report; or modify it.

You can reactivate a forecast at any time.

Forecast Locked

Select *Yes* to lock the forecast. On a locked forecast, you cannot:

- Edit
- Adjust rows
- Autoforecast
- Reforecast

A locked forecast remains visible unless you inactivate it. You cannot derive forecast summaries, roll-ups, reports, or other objects from locked forecasts.

Locked forecasts are permanently unavailable for editing. When you lock a forecast, you freeze the currency conversion rates for that forecast.

Archiving and Restoring Forecasts

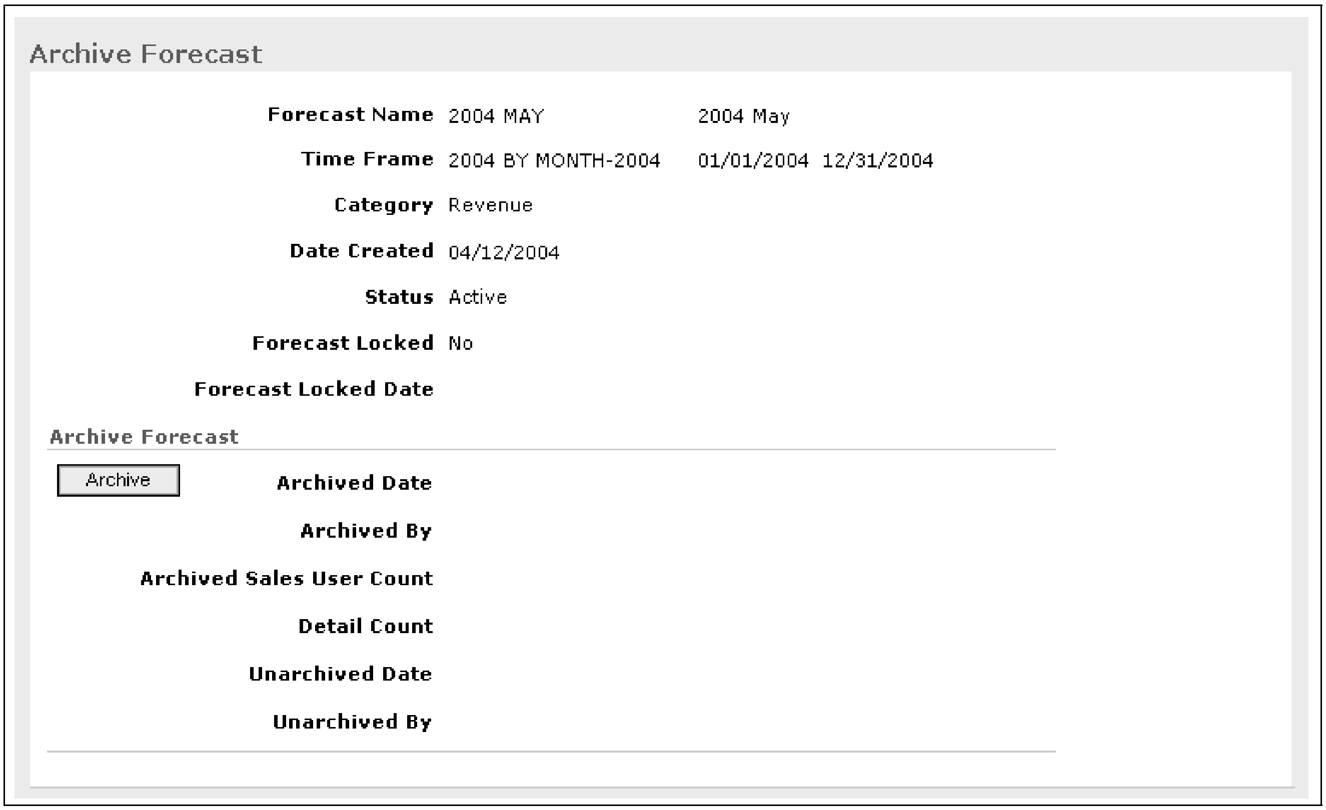
This section discusses how to archive and restore forecasts.

Pages Used to Archive and Restore Forecasts

Page Name	Object Name	Navigation	Usage
Archive Forecast	RSF_FCAST_ARCH	Set Up CRM, Product Related, Sales, Forecast, Archive Forecast	Archive a forecast.
Unarchive Forecast	RSF_FCAST_UNARCH	Set Up CRM, Product Related, Sales, Forecast, Unarchive Forecast	Restore an archived forecast.

Archiving a Forecast

Access the Archive Forecast page.



Archive Forecast page

To increase system performance, you can periodically archive your forecasts. Archiving maintains forecasts in duplicate sets of forecast data tables, allowing the system to access current forecasts faster than if all forecasts remained in the original table. You can also restore a forecast after it is archived.

Archive

Click to archive the forecast. You cannot access an archived forecast except on the Unarchive Forecast page. You cannot view an archived forecast; include it in a forecast summary, roll-up, or report; or modify it.

When you archive a forecast, you move it from its original tables, the tables in which you create and edit forecasts, into archiving tables. This enables the system to process unarchived forecasts faster. All archived forecasts have a status of *Inactive*.

Archived Date	Displays the date when you click Archive to archive the forecast.
Archived By	Displays the name of the logged-in user when you click Archive to archive the forecast.
Archived Sales User Count	Displays the total number of sales users that compose the sales forecast.
Archived Detail Count	Displays the total number of opportunity details in the sales forecast.

PART 5

Working with Customer Accounts

CHAPTER 22

Working with Customer Accounts

This chapter provides an overview of customer accounts and discusses how to:

- Flatten customer hierarchies.
- Manage customer accounts.

Understanding Customer Accounts

PeopleSoft Enterprise Sales has limited functionality that enables you to plan and manage accounts for your customers. Before you can use the account functionality, you must define a company business object.

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

You should use PeopleSoft Strategic Account Planning if you need more robust functionality for account management. PeopleSoft Strategic Account Planning is a system that enables you to plan and manage complex accounts for your most important customers, sites, and partners.

Flattening Customer Hierarchies

When you sell products and services to different subsidiaries and different locations of the same company, you might establish a different sales account with different account team members and sales goals for each. In PeopleSoft Customer Relationship Management (PeopleSoft CRM), the each object that represents a different entity of a customer company can have its own account information related to it. The objects are related in a customer hierarchy that is often complex and time-consuming to navigate.

The Flatten Customer Hierarchy process (RB_CUST_FLAT) captures all of the parent and child customer relationships and consolidates the data in a table that is optimized for quick searching from the My Accounts page. The flattener process along with account access profiles and data distribution rules for roles control the data that you can see on the My Accounts page and on the Account page in the Company component.

Page Used to Flatten Customer Hierarchies

Page Name	Object Name	Navigation	Usage
Customer Access Update	RB_CUST_FLAT_RUN	Customers CRM, Flatten Customer Hierarchy	Run the Flatten Customer Hierarchy process to structure account data for ease of access.

Managing Customer Accounts

This section discusses how to:

- Access customer accounts.
- Assign company representatives to accounts.
- Create account plans.

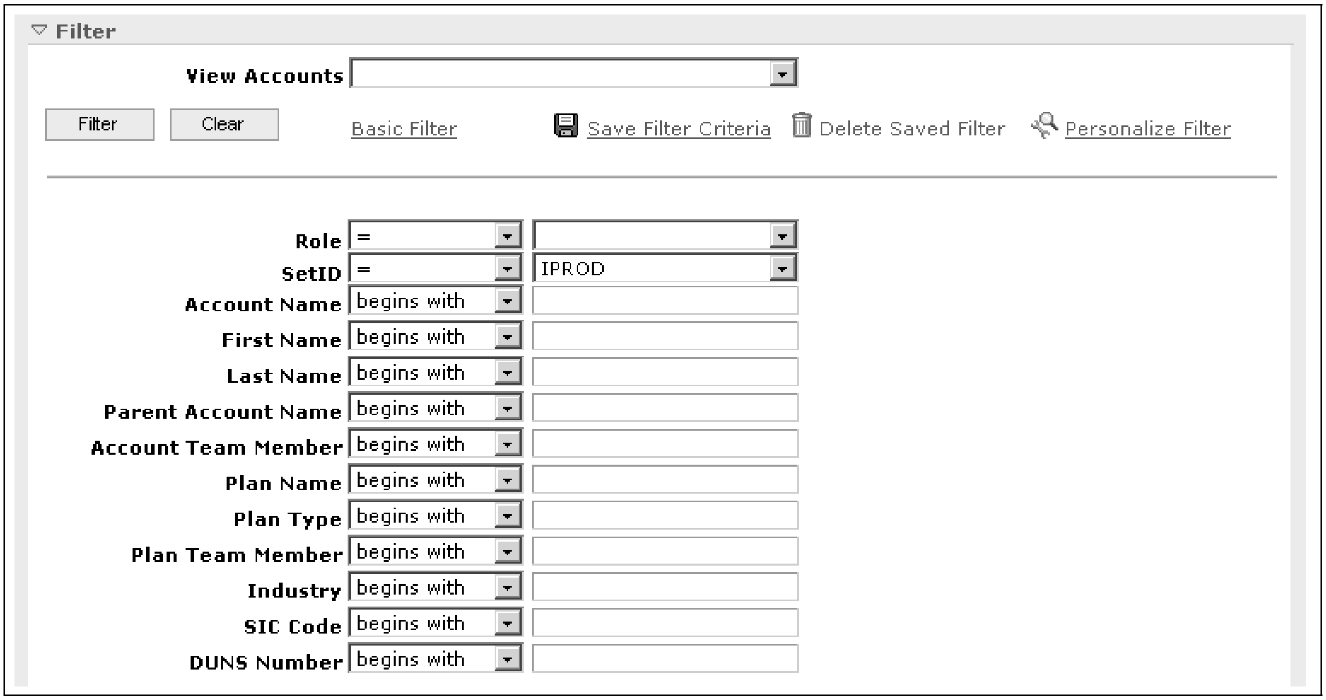
Pages Used to Manage Customer Accounts

Page Name	Object Name	Navigation	Usage
My Accounts	RD_ACCOUNTS	My Accounts	View a list of customer accounts and select an account to view in more detail.
Company - Account Team	RD_ACCOUNT_TEAM	My Accounts, select a company	Assign the account team for a company.

Accessing Customer Accounts

Access the My Accounts page.

My Accounts page (1 of 3)



My Accounts page (2 of 3)

My Accounts page (3 of 3)

Create Plan	Click this link to create a new plan.
View Account Plans	Click this link to view the existing plans.

Show in Results

Select the following check boxes to choose which accounts the system displays when you perform a search.

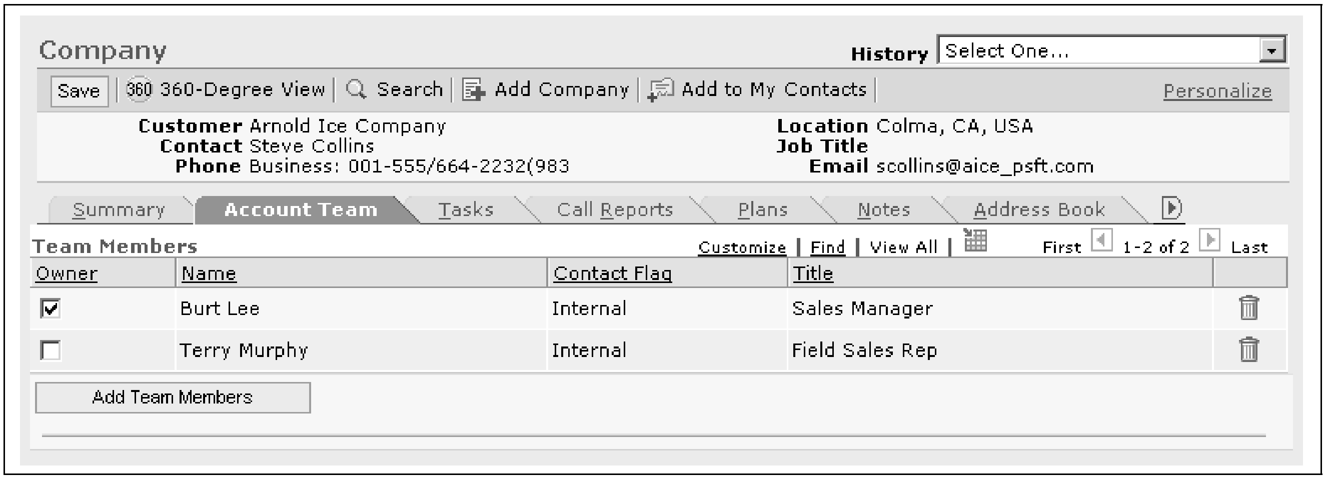
Note. The check boxes available in the Show in Results section depends on how you set the configurable search options.

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

Accounts as Plan Owner	Select to display accounts for which you are the plan owner.
Accounts as Manager	Select to display accounts for which you are the manager.
Accounts as an Owner	Select to display accounts for which you are the owner.
Accounts as Plan Team Member	Select to display accounts for which you are a member of the plan team.
Accounts as Team Member	Select to display accounts for which you are a team member.
Customers as Lead Team Member	Select to display customer accounts that are associated with a lead on which you are a team member.
Customers as Oppy Team Member (customers as opportunity team member)	Select to display customer accounts that are associated with an opportunity on which you are a team member.
Partners as Lead Team Member	Select to display partner accounts that are associated with a lead on which you are a team member.
Partners as Oppy Team Member (partners as opportunity team member)	Select to display partner accounts that are associated with an opportunity on which you are a team member.
Sites as Lead Team Member	Select to display site accounts that are associated with a lead on which you are a team member.
Sites as Oppy Team Member (sites as opportunity team member)	Select to display site accounts that are associated with an opportunity on which you are a team member.
Accounts as Temporary Assignee	Select to display accounts on which you are a temporary assignee.
View All Accounts	Select to display all accounts.

Assigning Account Representatives to a Company

Access the Company - Account Team page.

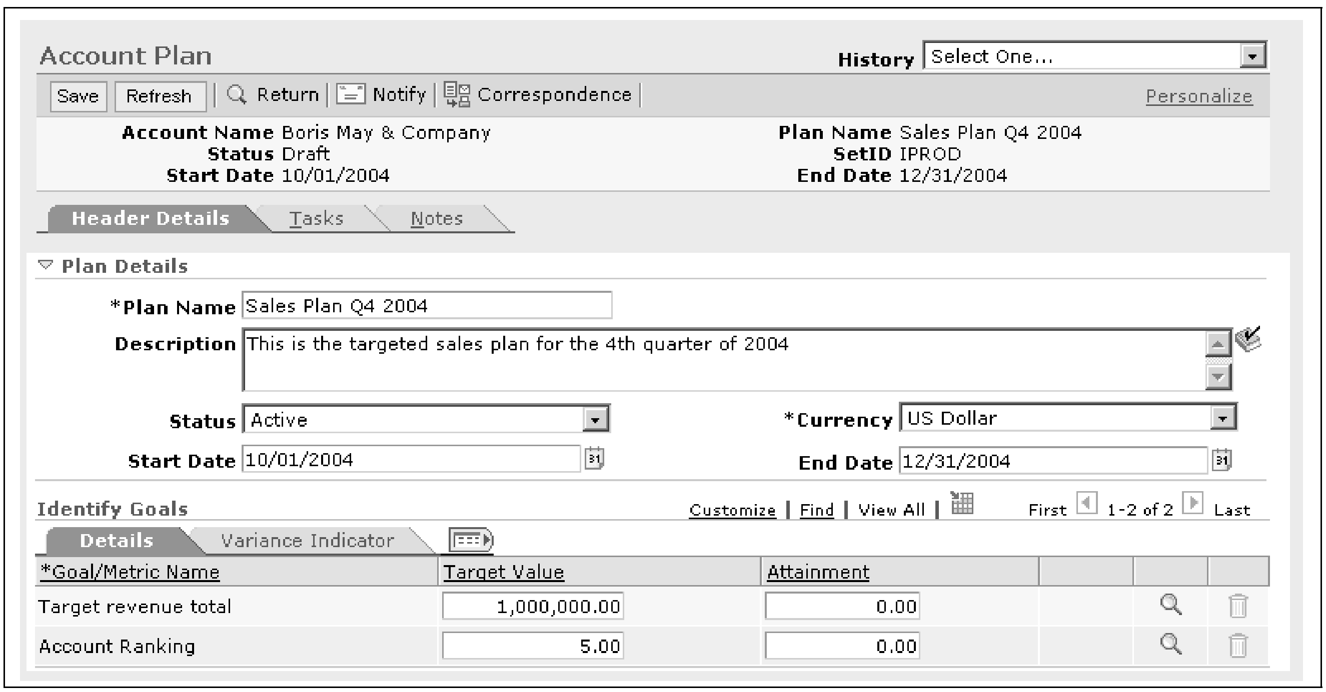


Company - Account Team page

Click Add Team Members to add company representatives to the account team.

Creating Account Plans

Access the Account Plan page.



Account Plan page

Plan Name	Enter a name for the plan.
Description	Enter a description for the plan.
Status	Select a status for the plan. Values are *Active* and *Inactive.*
Currency	Select a currency for the plan.
Start Date	Enter the start date for the plan.

End Date	Enter the end date for the plan.
Goal Name	Displays a goal name for the plan.
Target Value	Enter the expected value for the goal.
Attainment	Enter the actual value for the goal.

APPENDIX A

Understanding PeopleSoft Sales Interactive Reports

This chapter provides an overview of interactive reports and discusses how to launch and work with forecast interactive reports.

Understanding Interactive Reports

PeopleSoft interactive reports are a high-level implementation of PeopleTools Business Analysis Modeler (BAM). Interactive reports do not require an analytic logic server or a separate database to store data. Interactive reports are dynamic, interactive analytic reports. You can move data elements around on a report and use different dimensions to get visibility of your data.

Interactive reports for PeopleSoft Sales are launched from the Forecast component and are "in context" views driven directly from the forecast ID being examined. These reports are multidimensional, displaying operational data such as revenue by region and sales representative. There is also a comparison of forecasts for the same time period.

When you launch an interactive report, predefined queries capture forecast data and display it for your analysis with flexible groupings and subtotals. The queries are predefined and activate when you click the interactive report launch buttons.

You can save interactive reports, export them to Microsoft Excel, or print them. While interactive reports are interactive, the communication between interactive reports and your sales database is one-way. The changes that you make to a interactive report do not affect data in your database. Interactive reports launch in separate windows. User roles and access profiles control access to forecasts and thereby to interactive reports in PeopleSoft Sales.

Note. You must have Internet Explorer 5.1 or higher to access interactive reports and BAM reports.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Using Interactive Reports"

Launching and Working with Forecast Interactive Reports

This section discusses launching and working with interactive reports for PeopleSoft Sales.

PeopleSoft Sales delivers two interactive reports:

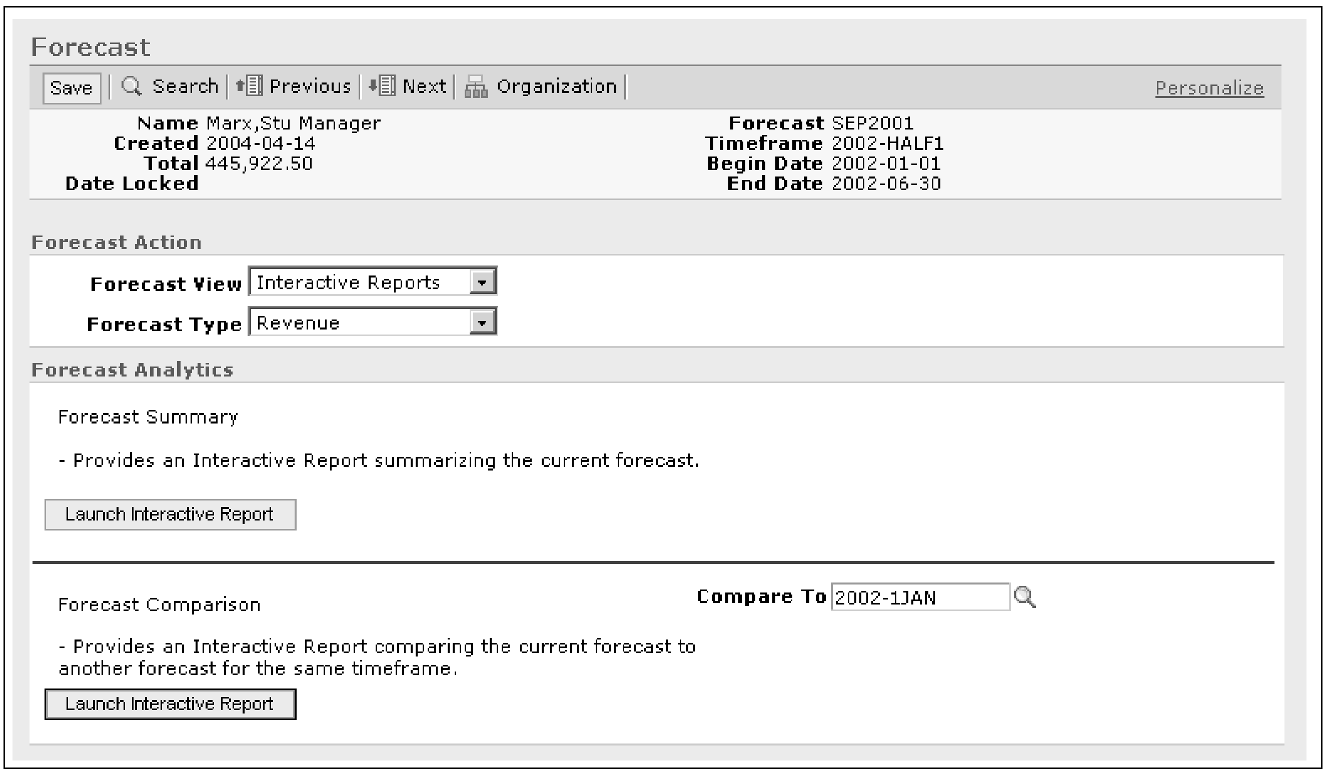
- *Forecast Summary* reports, which enable you to display any previously created forecast, organized by Sales Rep, Territory, Region, and Business Unit.
- *Forecast Comparison* reports, which enable you to select and compare any two forecasts for the same time period, showing the variance and revenue line items that have fallen out or been added to the forecasts.

Pages Used to Launch and Work with Forecast Interactive Reports

Page Name	Object Name	Navigation	Usage
Forecast	RSF_FCAST_SAI	Sales, Search Forecasts Select a forecast and then *Interactive Reports* as the Forecast View.	Generate an interactive report summary of a revenue forecast or compare the current forecast to a previous forecast for the same time frame.

Launching Forecast Interactive Reports

Access the Forecast page.



Forecast page: Interactive Reports view

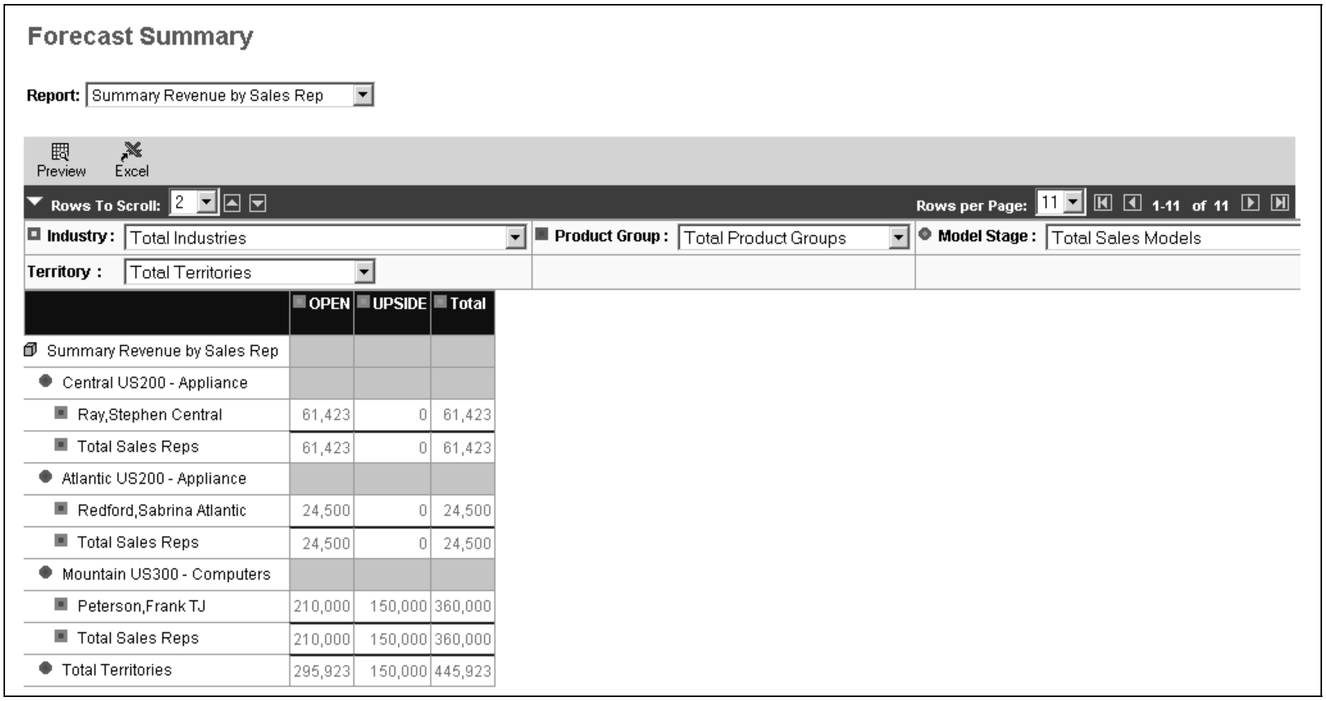
Select *Interactive Reports* as the Forecast View.

Note. You can only use interactive reports if your user's functional options has *CORE_RSF_FCAST_SIMPLE* set for full functionality.

See Chapter 3, "Setting Up Sales Security and Personalization," Setting Up Functional Options, page 24.

Working with the Sales Forecast Summary Interactive Report

Click the Launch Interactive Report button from the Forecast Summary portion of the Forecast Analytics section of the Forecast page.



Forecast Summary page

Use these dimensions to rearrange the forecast data and analyze it from different perspectives:

Report Select the source of revenue to report. Values are:

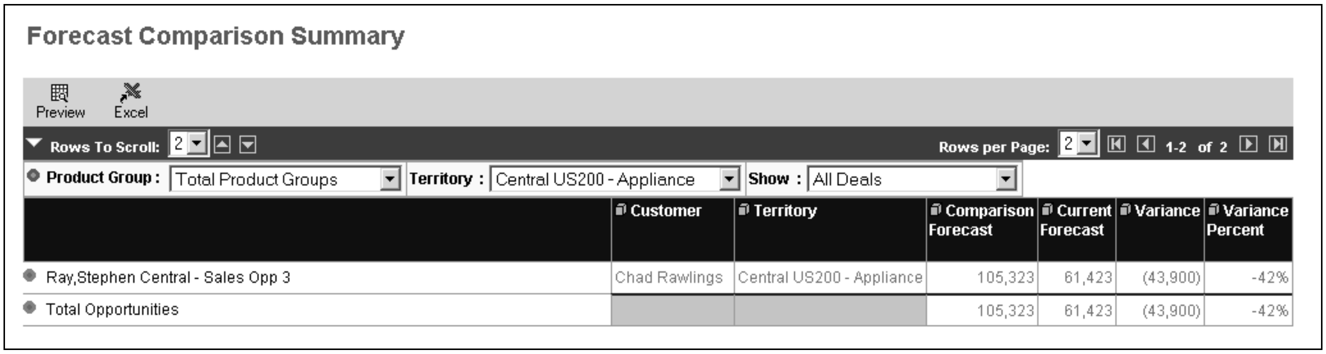
- *Summary Revenue by Business Unit.*
- *Summary Revenue by Region.*
- *Summary Revenue by Territory.*
- *Summary Revenue by Sales Rep.*

Industry, Product Group and **Territory** The choices available for each of these are based on the industries, product groups, and territories associated with opportunities in the forecast being examined.

Model Stage Select the stage in the sales process for which you want to view data.

Working with the Sales Forecast Comparison Summary Interactive Report

Click the Launch Interactive Report button from the Forecast Comparison portion of the Forecast Analytics section of the Forecast page.



Forecast Comparison Summary page

This summary provides a comparison between the current forecast for this time frame and another, earlier, forecast for the same time frame.

Use these dimensions to rearrange the forecast comparison and analyze it from different perspectives:

Product Group Select from product groups associated with the opportunities in the forecast being examined.

Territory Select from the territories associated with the forecast being examined.

Show Select the data to show in the comparison. Values are:

- *All Deals.*
- *Only revenue declines.*
- *Only revenue increases.*
- *Only fallout.*
- *Only new revenue.*

APPENDIX B

PeopleSoft Sales Reports

This chapter provides an overview of PeopleSoft Sales reports and enables you to view a summary table of all reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

Report Description

This table lists the PeopleSoft Sales reports, sorted alphanumerically by report ID.

Report ID and Report Name	Description	Navigation	Run Control Page
RSFC1000 Task Summary Report	Lists information about a sales representative's tasks on leads and opportunities: start date, end date, customer, and status.	Sales, Reports, Task Summary	RUN_RSFC1000
RSFC1001 Company	Lists information about the companies with which you do business, including the customer ID, name, web site, and phone number.	Sales, Reports, Company	RUN_RSFC1001
RSFC1002 Customer Revenue Ranking By Product Group	Lists customers by revenue generated and product group. Includes customer name, revenue, percentage, total by product group, and grand total.	Sales, Reports, Customer Rev Rank	RUN_RSFC1002
RSFC1003 Forecast By Product Group	Lists forecast information by product group.	Sales, Reports, Forecast by Product Group	RUN_RSFC1003
RSFC1004 Forecast By Sales Users	Lists information about the activities of sales users.	Sales, Reports, Forecast by Sales Rep	RUN_RSFC1004
RSFC1005 Opportunity	Lists information about opportunities.	Sales, Reports, Opportunity	RUN_RSFC1005
RSFC1007 Product Group Review Revenue Analysis	Lists information about revenue, sorted by product group, including forecast name and type, sales model and stage, and total by product group.	Sales, Reports, Product Group Revenue	RUN_RSFC1007

Report ID and Report Name	Description	Navigation	Run Control Page
RSFC1009 Revenue Fallout Analysis	Lists information about revenue fallout, including customer name, opportunity, close date, revenue, fallout reason, and totals by sales stage, territory, and business unit.	Sales, Reports, Revenue Fallout Analysis	RUN_RSFC1009
RSFC1010 Customer Revenue Ranking By Industry	Lists information about generated revenue, sorted by industry.	Sales, Reports, Rank By Industry	RUN_RSFC1010
RSFC1011 Customer Revenue Ranking By Region	Lists customer information, sorted by revenue.	Sales, Reports, Rank By Region	RUN_RSFC1011
RSFC1013 Product for Open Opportunities	Lists information about product lines and products, including associated opportunity name, quantity , unit of measure, and price.	Sales, Reports, Products Open Opportunity	RUN_RSFC1013

APPENDIX C

ISO Country and Currency Codes

PeopleBooks use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

This appendix discusses:

- ISO country codes.
- ISO currency codes.

See Also

"About This PeopleBook," Typographical Conventions and Visual Cues

ISO Country Codes

This table lists the ISO country codes that may appear as country identifiers in PeopleBooks:

ISO Country Code	Country Name
ABW	Aruba
AFG	Afghanistan
AGO	Angola
AIA	Anguilla
ALB	Albania
AND	Andorra
ANT	Netherlands Antilles
ARE	United Arab Emirates
ARG	Argentina
ARM	Armenia
ASM	American Samoa
ATA	Antarctica

ISO Country Code	Country Name
ATF	French Southern Territories
ATG	Antigua and Barbuda
AUS	Australia
AUT	Austria
AZE	Azerbaijan
BDI	Burundi
BEL	Belgium
BEN	Benin
BFA	Burkina Faso
BGD	Bangladesh
BGR	Bulgaria
BHR	Bahrain
BHS	Bahamas
BIH	Bosnia and Herzegovina
BLR	Belarus
BLZ	Belize
BMU	Bermuda
BOL	Bolivia
BRA	Brazil
BRB	Barbados
BRN	Brunei Darussalam
BTN	Bhutan
BVT	Bouvet Island
BWA	Botswana
CAF	Central African Republic
CAN	Canada
CCK	Cocos (Keeling) Islands

ISO Country Code	Country Name
CHE	Switzerland
CHL	Chile
CHN	China
CIV	Cote D'Ivoire
CMR	Cameroon
COD	Congo, The Democratic Republic
COG	Congo
COK	Cook Islands
COL	Colombia
COM	Comoros
CPV	Cape Verde
CRI	Costa Rica
CUB	Cuba
CXR	Christmas Island
CYM	Cayman Islands
CYP	Cyprus
CZE	Czech Republic
DEU	Germany
DJI	Djibouti
DMA	Dominica
DNK	Denmark
DOM	Dominican Republic
DZA	Algeria
ECU	Ecuador
EGY	Egypt
ERI	Eritrea
ESH	Western Sahara

ISO Country Code	Country Name
ESP	Spain
EST	Estonia
ETH	Ethiopia
FIN	Finland
FJI	Fiji
FLK	Falkland Islands (Malvinas)
FRA	France
FRO	Faroe Islands
FSM	Micronesia, Federated States
GAB	Gabon
GBR	United Kingdom
GEO	Georgia
GHA	Ghana
GIB	Gibraltar
GIN	Guinea
GLP	Guadeloupe
GMB	Gambia
GNB	Guinea-Bissau
GNQ	Equatorial Guinea
GRC	Greece
GRD	Grenada
GRL	Greenland
GTM	Guatemala
GUF	French Guiana
GUM	Guam
GUY	Guyana
GXA	GXA - GP Core Country

ISO Country Code	Country Name
GXB	GXB - GP Core Country
GXC	GXC - GP Core Country
GXD	GXD - GP Core Country
HKG	Hong Kong
HMD	Heard and McDonald Islands
HND	Honduras
HRV	Croatia
HTI	Haiti
HUN	Hungary
IDN	Indonesia
IND	India
IOT	British Indian Ocean Territory
IRL	Ireland
IRN	Iran (Islamic Republic Of)
IRQ	Iraq
ISL	Iceland
ISR	Israel
ITA	Italy
JAM	Jamaica
JOR	Jordan
JPN	Japan
KAZ	Kazakstan
KEN	Kenya
KGZ	Kyrgyzstan
KHM	Cambodia
KIR	Kiribati
KNA	Saint Kitts and Nevis

ISO Country Code	Country Name
KOR	Korea, Republic of
KWT	Kuwait
LAO	Lao People’s Democratic Rep
LBN	Lebanon
LBR	Liberia
LBY	Libyan Arab Jamahiriya
LCA	Saint Lucia
LIE	Liechtenstein
LKA	Sri Lanka
LSO	Lesotho
LTU	Lithuania
LUX	Luxembourg
LVA	Latvia
MAC	Macao
MAR	Morocco
MCO	Monaco
MDA	Moldova, Republic of
MDG	Madagascar
MDV	Maldives
MEX	Mexico
MHL	Marshall Islands
MKD	Fmr Yugoslav Rep of Macedonia
MLI	Mali
MLT	Malta
MMR	Myanmar
MNG	Mongolia
MNP	Northern Mariana Islands

ISO Country Code	Country Name
MOZ	Mozambique
MRT	Mauritania
MSR	Montserrat
MTQ	Martinique
MUS	Mauritius
MWI	Malawi
MYS	Malaysia
MYT	Mayotte
NAM	Namibia
NCL	New Caledonia
NER	Niger
NFK	Norfolk Island
NGA	Nigeria
NIC	Nicaragua
NIU	Niue
NLD	Netherlands
NOR	Norway
NPL	Nepal
NRU	Nauru
NZL	New Zealand
OMN	Oman
PAK	Pakistan
PAN	Panama
PCN	Pitcairn
PER	Peru
PHL	Philippines
PLW	Palau

ISO Country Code	Country Name
PNG	Papua New Guinea
POL	Poland
PRI	Puerto Rico
PRK	Korea, Democratic People’s Rep
PRT	Portugal
PRY	Paraguay
PSE	Palestinian Territory, Occupie
PYF	French Polynesia
QAT	Qatar
REU	Reunion
ROU	Romania
RUS	Russian Federation
RWA	Rwanda
SAU	Saudi Arabia
SDN	Sudan
SEN	Senegal
SGP	Singapore
SGS	Sth Georgia & Sth Sandwich Is
SHN	Saint Helena
SJM	Svalbard and Jan Mayen
SLB	Solomon Islands
SLE	Sierra Leone
SLV	El Salvador
SMR	San Marino
SOM	Somalia
SPM	Saint Pierre and Miquelon
STP	Sao Tome and Principe

ISO Country Code	Country Name
SUR	Suriname
SVK	Slovakia
SVN	Slovenia
SWE	Sweden
SWZ	Swaziland
SYC	Seychelles
SYR	Syrian Arab Republic
TCA	Turks and Caicos Islands
TCD	Chad
TGO	Togo
THA	Thailand
TJK	Tajikistan
TKL	Tokelau
TKM	Turkmenistan
TLS	East Timor
TON	Tonga
TTO	Trinidad and Tobago
TUN	Tunisia
TUR	Turkey
TUV	Tuvalu
TWN	Taiwan, Province of China
TZA	Tanzania, United Republic of
UGA	Uganda
UKR	Ukraine
UMI	US Minor Outlying Islands
URY	Uruguay
USA	United States

ISO Country Code	Country Name
UZB	Uzbekistan
VAT	Holy See (Vatican City State)
VCT	St Vincent and the Grenadines
VEN	Venezuela
VGB	Virgin Islands (British)
VIR	Virgin Islands (U.S.)
VNM	Viet Nam
VUT	Vanuatu
WLF	Wallis and Futuna Islands
WSM	Samoa
YEM	Yemen
YUG	Yugoslavia
ZAF	South Africa
ZMB	Zambia
ZWE	Zimbabwe

ISO Currency Codes

This table lists the ISO country codes that may appear as currency identifiers in PeopleBooks:

ISO Currency Code	Description
ADP	Andorran Peseta
AED	United Arab Emirates Dirham
AFA	Afghani
AFN	Afghani
ALK	Old Lek
ALL	Lek
AMD	Armenian Dram

ISO Currency Code	Description
ANG	Netherlands Antilles Guilder
AOA	Kwanza
AOK	Kwanza
AON	New Kwanza
AOR	Kwanza Reajustado
ARA	Austral
ARP	Peso Argentino
ARS	Argentine Peso
ARY	Peso
ATS	Schilling
AUD	Australian Dollar
AWG	Aruban Guilder
AZM	Azerbaijanian Manat
BAD	Dinar
BAM	Convertible Marks
BBD	Barbados Dollar
BDT	Taka
BEC	Convertible Franc
BEF	Belgian Franc
BEL	Financial Belgian Franc
BGJ	Lev A/52
BGK	Lev A/62
BGL	Lev
BGN	Bulgarian LEV
BHD	Bahraini Dinar
BIF	Burundi Franc
BMD	Bermudian Dollar

ISO Currency Code	Description
BND	Brunei Dollar
BOB	Boliviano
BOP	Peso
BOV	Mvdol
BRB	Cruzeiro
BRC	Cruzado
BRE	Cruzeiro
BRL	Brazilian Real
BRN	New Cruzado
BRR	Brazilian Real Dollar
BSD	Bahamian Dollar
BTN	Ngultrum
BUK	N/A
BWP	Pula
BYB	Belarussian Ruble
BYR	Belarussian Ruble
BZD	Belize Dollar
CAD	Canadian Dollar
CDF	Franc Congolais
CHF	Swiss Franc
CLF	Unidades de fomento
CLP	Chilean Peso
CNX	Peoples Bank Dollar
CNY	Yuan Renminbi
COP	Colombian Peso
CRC	Costa Rican Colon
CSD	Serbia Dinar

ISO Currency Code	Description
CSJ	Krona A/53
CSK	Koruna
CUP	Cuban Peso
CVE	Cape Verde Escudo
CYP	Cyprus Pound
CZK	Czech Koruna
DEM	Deutsche Mark
DJF	Djibouti Franc
DKK	Danish Krone
DOP	Dominican Peso
DZD	Algerian Dinar
ECS	Sucre
ECV	Unidad de Valor
EEK	Kroon
EGP	Egyptian Pound
EQE	Ekwele
ERN	Nakfa
ESA	Spanish Peseta
ESB	Convertible Peseta
ESP	Spanish Peseta
ETB	Ethiopian Birr
EUR	euro
FIM	Markka
FJD	Fiji Dollar
FKP	Falklands Isl. Pound
FRF	French Franc
GBP	Pound Sterling

ISO Currency Code	Description
GEK	Georgian Coupon
GEL	Lari
GHC	Cedi
GIP	Gibraltar Pound
GMD	Dalasi
GNE	Syli
GNF	Guinea Franc
GNS	Syli
GQE	Ekwele
GRD	Drachma
GTQ	Quetzal
GWE	Guinea Escudo
GWP	Guinea-Bissau Peso
GYD	Guyana Dollar
HKD	Hong Kong Dollar
HNL	Lempira
HRD	Dinar
HRK	Kuna
HTG	Gourde
HUF	Forint
IDR	Rupiah
IEP	Irish Pound
ILP	Pound
ILR	Old Shekel
ILS	New Israeli Sheqel
INR	Indian Rupee
IQD	Iraqi Dinar

ISO Currency Code	Description
IRR	Iranian Rial
ISJ	Old Krona
ISK	Iceland Krona
ITL	Italian Lira
JMD	Jamaican Dollar
JOD	Jordanian Dinar
JPY	Yen
KES	Kenyan Shilling
KGS	Som
KHR	Riel
KMF	Comoro Franc
KPW	North Korean Won
KRW	Won
KWD	Kuwaiti Dinar
KYD	Cayman Islands dollar
KZT	Tenge
LAJ	Kip Pot Pol
LAK	Kip
LBP	Lebanese Pound
LKR	Sri Lanka Rupee
LRD	Liberian Dollar
LSL	Loti
LSM	Maloti
LTL	Lithuanian Litas
LTT	Talonas
LUC	Convertib Francl
LUF	Luxembourg Franc

ISO Currency Code	Description
LUL	Financial Franc
LVL	Latvian Lats
LVR	Latvian Ruble
LYD	Libyan Dinar
MAD	Moroccan Dirham
MAF	Mali Franc
MDL	Moldovan Leu
MGF	Malagasy Franc
MKD	Denar
MLF	Mali Franc
MMK	Kyat
MNT	Tugrik
MOP	Pataca
MRO	Ouguiya
MTL	Maltese Lira
MTP	Maltese Pound
MUR	Mauritius Rupee
MVQ	Maldive Rupee
MVR	Rufiyaa
MWK	Malawian Kwacha
MXN	Mexican Peso
MXP	Mexican Peso
MXV	Mexican UDI
MYR	Malaysian Ringgit
MZE	Mozambique Escudo
MZM	Metical
NAD	Namibia Dollar

ISO Currency Code	Description
NGN	Naira
NIC	Cordoba
NIO	Cordoba Oro
NLG	Netherlands Guilder
NOK	Norwegian Krone
NPR	Nepalese Rupee
NZD	New Zealand Dollar
OMR	Rial Omani
PAB	Balboa
PEI	Inti
PEN	Nuevo Sol
PES	Sol
PGK	Kina
PHP	Philippine Peso
PKR	Pakistan Rupee
PLN	Zloty
PLZ	Zloty
PTE	Portuguese Escudo
PYG	Guarani
QAR	Qatari Rial
ROK	Leu A/52
ROL	Leu
RUB	Russian Ruble
RUR	Russian Federation Rouble
RWF	Rwanda Franc
SAR	Saudi Riyal
SBD	Solomon Islands

ISO Currency Code	Description
SCR	Seychelles Rupee
SDD	Sudanese Dinar
SDP	Sudanese Pound
SEK	Swedish Krona
SGD	Singapore Dollar
SHP	St Helena Pound
SIT	Tolar
SKK	Slovak Koruna
SLL	Leone
SOS	Somali Shilling
SRG	Surinam Guilder
STD	Dobra
SUR	Rouble
SVC	El Salvador Colon
SYP	Syrian Pound
SZL	Lilangeni
THB	Baht
TJR	Tajik Ruble
TJS	Somoni
TMM	Manat
TND	Tunisian Dinar
TOP	Pa’anga
TPE	Timor Escudo
TRL	Turkish Lira
TTD	Trinidad Dollar
TWD	New Taiwan Dollar
TZS	Tanzanian Shilling

ISO Currency Code	Description
UAH	Hryvnia
UAK	Karbovanet
UGS	Uganda Shilling
UGW	Old Shilling
UGX	Uganda Shilling
USD	US Dollar
USN	US Dollar (Next day)
USS	US Dollar (Same day)
UYN	Old Uruguay Peso
UYP	Uruguayan Peso
UYU	Peso Uruguayo
UZS	Uzbekistan Sum
VEB	Bolivar
VNC	Old Dong
VND	Dong
VUV	Vatu
WST	Tala
XAF	CFA Franc BEAC
XAG	Silver
XAU	GOLD
XBA	European Composite Unit
XBB	European Monetary Unit
XBC	European Unit of Account 9
XBD	European Unit of Account 17
XCD	East Caribbean Dollar
XDR	SDR
XEU	EU Currency (E.C.U)

ISO Currency Code	Description
XFO	Gold-Franc
XFU	UIC-Franc
XOF	CFA Franc BCEAO
XPD	Palladium
XPF	CFP Franc
XPT	Platinum
XTS	For Testing Purposes
XXX	Non Currency Transaction
YDD	Yemeni Din
YER	Yemeni Rial
YUD	New Yugoslavian Dinar
YUM	New Dinar
YUN	Yugoslavian Dinar
ZAL	Financial Rand
ZAR	Rand
ZMK	Zambian Kwacha
ZRN	New Zaire
ZRZ	Zaire
ZWC	Rhodesian Dollar
ZWD	Zimbabwe Dollar

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

agreement In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

AR specialist Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

asset class An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

authentication server A server that is set up to verify users of the system.

base time period In PeopleSoft Business Planning, the lowest level time period in a calendar.

benchmark job In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

book In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

branch A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business event In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

catalog item In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, “Introduction to Microsoft Word.” A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog.

catalog partner In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

collection To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

condition In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

cost profile A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

cost row A cost transaction and amount for a set of ChartFields.

current learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

data acquisition In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data elements Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
KPI	An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file	Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new

laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template — In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

match group — In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server — Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity — In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL — Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring — Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook — In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency — The ability to process transactions in a currency other than the business unit's base currency.

national allowance — In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

node-oriented tree — A tree that is based on a detail structure, but the detail values are not used.

pagelet — Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

participant — In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object — Each participant object may be related to one or more compensation objects.

See also *compensation object.*

partner — A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle — In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

pending item — In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag
Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

reference data
In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object
In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction
In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction’s budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing
In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object
In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data
Data that is extracted from a separate database and migrated into the local database.

REN server
Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester
In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

role
Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user
A PeopleSoft Workflow user. A person’s role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up
In a tree, to roll up is to total sums based on the information hierarchy.

run control
A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID
A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

serial genealogy In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

session In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

single signon With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source transaction In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

statutory account — Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step — In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level — In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier — A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField — You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger — An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period — In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree — A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate — To distribute a production version of the enterprise catalog to partners.

system function — In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet — A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing — Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency — The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

template — A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory — In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

TimeSpan — A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

	than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worksheet A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

worklist The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

yield by operation In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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