PeopleSoft®

PeopleSoft Enterprise CRM 8.9 Partner Relationship Management PeopleBook

June 2004

Contents

About This PeopleBook

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

This preface discusses:

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

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

PeopleSoft Application Prerequisites

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

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

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

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

PeopleSoft Application Fundamentals

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

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

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Ordering Printed Documentation

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

- Web
- Telephone
- Email

Web

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

Telephone

Contact MMA Partners at 877 588 2525.

Email

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

See Also

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

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

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

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

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

Description Enter up to 30 characters of text.

Effective Date The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when

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

PeopleSoft Partner Relationship Management Preface

This preface discusses:

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

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

Additional Resources

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

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

Resource	Navigation
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Implement, Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Release Notes
Table loading sequences	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Table Loading Sequences
Troubleshooting information	Support, Troubleshooting
Upgrade Documentation	Implement, Optimize + Upgrade, Upgrade Guide

PeopleSoft Enterprise CRM Application Fundamentals

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

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

- CRM Multi-Product Foundation.

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

- Workforce Management.

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

- Interactions and 360-Degree Views.

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

- Self-Service for Customers.

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

- Relationship Management.

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

- Entitlement Management.

  This part discusses setting up agreements and warranties.

- SmartViews

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

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook

PeopleSoft CRM Enterprise Automation and Configuration Tools

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

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

- Correspondence Management.

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

- Automation Tools.

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

- Configuration Tools.

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

- Knowledge Management.

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

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook

Enterprise PeopleTools PeopleBooks

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

CHAPTER 1

Getting Started with PeopleSoft Partner Relationship Management

This chapter provides an overview of PeopleSoft Partner Relationship Management, and discusses:

- PeopleSoft Partner Relationship Management integrations.
- PeopleSoft Partner Relationship Management implementation.

PeopleSoft Partner Relationship Management Overview

Partner Relationship Management encompasses all the processes necessary for modeling partners and profile information, registering partners, managing security, analyzing performance, and allowing partners to effectively interact with an enterprise via a partner portal.

PeopleSoft has integrated Partner Relationship Management capabilities into many parts of the CRM process, including marketing, sales, commerce, and service. This comprehensive enablement of PRM through the CRM suite makes it possible for you and your partners to share CRM features, functionality, and transactions, including leads, quotes, orders, cases, and more.

PeopleSoft's Partner Relationship Management encompasses four phases in the partner lifecycle:

- Definition of partner strategy and programs, including program objectives and membership structures.

  Features like Partner Programs help you define and describe program details for various partner categories and participation levels.
- Partner recruitment and acquisition, with tools that include configurable online application forms and dialog recruitment that capture all information in a single repository.

  This information is accessible in a comprehensive Partner Profile that provides a single, at-a-glance partner overview.
- Engagement of partners in Enterprise Business Processes, including marketing, sales, commerce, and/or service.
- Management of the ongoing partner relationship, including reviewing and rewarding partner performance, and determining which relationships should be invested in, and which should be terminated.

PeopleSoft Partner Relationship Management Integrations

PeopleSoft Enterprise Partner Relationship Management is enabled in the following PeopleSoft applications:

- PeopleSoft Order Capture and Order Capture Self-Service.

- PeopleSoft Sales.
- PeopleSoft Marketing.
- PeopleSoft Online Marketing.
- PeopleSoft Strategic Account Planning.
- PeopleSoft Support.
- PeopleSoft Advanced Configurator and PeopleSoft Advisor

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

PeopleSoft Partner Relationship Management 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/PeopleSoft Enterprise Partner 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 relevant for your PRM enablement activities.

This table lists the component that has a component interface:

Component	Component Interface	Reference
Partner RD_PARTNER_CI	RD_PARTNER_CI_API	See Chapter 5, "Creating and Maintaining Partner Profiles," page 25.

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

Understanding PeopleSoft Partner Relationship Management

This chapter discusses:

- PeopleSoft Partner Relationship Management
- PeopleSoft Partner Relationship Management Business Processes

PeopleSoft Partner Relationship Management

This section discusses:

- PeopleSoft Lifecycle Management and the Partner Platform
- Partner programs
- Partner profile and administration
- Application security
- Partner recruitment and registration
- Distributed security and self-administration
- Partner Portal and managing transactions.

PeopleSoft Lifecycle Management

PeopleSoft's Partner Lifecycle Management encompasses four phases:

- Definition of partner strategy and programs, including program objectives and membership structures.

  Features like Partner Programs help you define and describe program details for various partner categories and participation levels
- Partner recruitment and acquisition, with tools that include online application forms and dialog recruitment that capture all information in a single repository.

  This information is accessible in a comprehensive Partner Profile that provides a single, at-a-glance partner overview.
- Engagement of partners in Enterprise Business Processes, including marketing, sales, commerce, and/or service.
- Management of the ongoing partner relationship, including reviewing and rewarding partner performance, and determining which relationships should be invested in, and which should be terminated.

The PeopleSoft Partner Platform lays the foundation for the PeopleSoft PRM solution with a robust security model, comprehensive yet extensible partner data model, and core partner lifecycle management features and functionality. Partner program administrators can easily configure business rules in the dynamic partner security model to only grant partner users access to data that is appropriate, such as select rows of customer data, partner-relevant transactions, and functional actions and prompting capabilities within each of the transactions. Prospective partners can register for specific partner programs via online application forms that are easily configurable by a partner program administrator. Once a partner is approved, enterprise channel managers and enterprise alliance managers can begin to build a centralized repository of profile data on each partner that can be leveraged for lead distribution, partner catalog management, and targeted communications. The Channel Manager will have access to a 360– degree view of the Partner for a one-stop overview of transactions and interactions associated to the partner. PeopleSoft Partner Management extends an enterprise's business processes and delivers the fundamental tools necessary to execute a successful partner strategy.

Partner Programs

In many partner relationship scenarios, a partner or alliances organization may group partners into different programs and categories, each with different requirements and benefits of membership, and so forth. A Partner Program is a new database object and a distinct component. An Enterprise Channel Manager will be able to specify the different partner programs and the related requirements, benefits, and fees for each program. Then, partner companies can apply for partnership and membership in one or more partner programs.

See Chapter 4, "Creating Partner Programs," page 11.

Partner Profile and Administration

Partner profiling captures and maintains detailed partner and relationship information. There are critical pieces of information about every partner that need to be captured based on their business, industry and operational area. These pieces of information change from industry to industry, and from business to business.

Partner profile information plays a crucial part in lead assignment, territory management, pricing, and several other important business functions. Partner Relationship Management's flexible solution accommodates an unlimited number of partner types, attributes, and relationships. Your organization can not only capture the characteristics of the partner organization, but also the characteristics of people or objects within that organization. Partner profiles consist of several types of profiles that are determined by the relationship with the partner, the role the partner plays, and how the partner interacts with your organization.

See Chapter 5, "Creating and Maintaining Partner Profiles," page 25.

Application Security

The Application Security Framework encompasses three key elements: who has access, what transactions or rows they can see, and what functions they can perform. The Who is similar to the Tools notion of users and roles. However, what we've done is enabled a much more flexible and dynamic way of creating and defining these so-called "memberships lists." The benefit to PeopleSoft customers lies in the reduction of maintenance overhead that comes from creating multiple Tools roles—one for every possible combination and permutation of permissions and functions. The best example of the "View List", which covers what the security membership can access and see is that of securing customer data from partners. Again, like the security membership concept, these "View Lists" can be defined in a very flexible and dynamic manner, based on configurable criteria. So, when a partner CSR logs into the Order Capture application, the customers that he or she can prompt on can be automatically restricted to only the customers that the Enterprise allows the partner to see. Finally, the "Functional Options" concept provides an additional level of granularity and control over what users can do within a PIA page. Today, PeopleTools allows users to be granted access to specific pages in an application, but once the user has access, he or she has carte blanche access to do anything on that page. When extending transactions to partner and third party users, a critical issue is limiting what they can do from a risk management and data security point of view.

See Chapter 6, "Setting Up Security for Partners," page 47.

Partner Recruitment and Registration

When your organization uses partners to penetrate or expand into specific sales territories, it can conduct marketing campaigns to recruit potential partners with specific characteristics that meet the ideal target partner profile. For example, a partner recruiting campaign can have a call to action that brings a prospective partner to an online self-registration or application page. Based on the responses of those campaigns, partners can be further qualified and approved as part of the recruitment process. Prospective partners can register at the web site of the enterprise and apply for partnership.

Once potential partners have been identified through prospecting and recruitment campaigns, partner registration allows your enterprise to capture profiling information about the partner company and partner employees. In addition to allowing internal enterprise users to capture partner information, partners themselves have access to online self-service registration for first-hand data entry, and maintenance of user profile information.

See Chapter 7, "Setting Up and Managing Partner Registration," page 57.

Distributed Security and Self-Administration

Distributed security enables partners to administer access to the Partner Relationship Management solution for their own partner employees. For enterprise channel management personnel, setting up a partner company can be a time-consuming task, but the daunting prospect of additionally setting up and keeping track of all partner employee users is even more challenging and time-consuming. Such activities should be delegated to the partners to reduce maintenance costs and provide a sense of empowerment to partners. Partners should be able to create and administer their own personnel records and logins within the confines of the security boundaries defined by the enterprise.

See Chapter 8, "Setting Up Distributed Security for Partner Users," page 67.

Partner Portal and Managing Transactions

The Partner Relationship Management solution delivers a new portal registry specifically for your partner users. The Partner Portal exposes only those transactions appropriate for your partner users and provides a home page that can be configured for each partner user. The partner portal includes pagelets that can contain lists of transactions, and along with the Enterprise Portal, customized news and content.

A partner can access and manage partner user profile information from the partner portal, as well as manage leads, view product catalogs, and manage quotes and orders.

The enterprise can also view and enter partner specific data within the core transactions of lead, oppy, order, quote, and support case. An agent or sales rep can reference the partner company and contact information on core enterprise transactions. Using the Partner 360 degree view, a channel manager can then view all of the activity a partner has had with the enterprise.

See Chapter 9, "Executing Partner Relationship Management Transactions," page 77.

PeopleSoft Partner Relationship Management Business Processes

PeopleSoft Enterprise Partner Relationship Management enables enterprises to implement a comprehensive partner strategy that extends beyond planning, executing, and managing partner programs to fully engage partners in all aspects of their business processes. The Partner Relationship Management solutions enable PeopleSoft CRM for partners. PeopleSoft CRM delivers several separately-licensed applications that together can be combined to form a specific PRM solution for your business needs. These solutions are divided as follows:

- Partner Platform. (Primary foundational Partner Relationship Management Solution)
- Partner Portal.
- Partner Collaborative Sales.
- Partner Collaborative Commerce.
- Partner Lifecycle Marketing.
- Partner Strategic Planning.

Partner Platform

The PeopleSoft Partner Platform lays the foundation for each PeopleSoft Partner Relationship Management solution with a robust security model, comprehensive yet extensible partner data model, and core partner lifecycle management features and functionality. Partner program administrators can easily configure business rules in the dynamic partner security model to only grant partner users access to data that is appropriate, such as select rows of customer data, partner-relevant transactions, and functional actions and prompting capabilities within each of the transactions that are exposed to the partner user. Prospective partners can register for specific partner programs via online application forms that are easily configurable by a partner program administrator. Once a partner is approved, enterprise channel managers and enterprise alliance managers can begin to build a centralized repository of profile data on each partner that can be leveraged for lead distribution, partner catalog management, and targeted communications. The Channel Manager will have access to a 360–degree View of the partner for a one-stop overview of transactions and interactions associated to the partner. The PeopleSoft Partner Platform extends an enterprise's business processes beyond the firewall and delivers the fundamental tools necessary to execute a successful partner strategy. Partner Platform introduces to PeopleSoft CRM the following features:

- Partner profiles that consist of a centralized repository of profile data on each partner. These profiles can be leveraged for lead distribution, partner commerce, and targeted communications.
- Partner programs to define partner membership requirements, benefits, and fees.
- Partner recruitment and registration via online forms for automating the process of growing the partner network.
- Delegated administration features empower partner administrators to manage their own users.
- A 360-degree view of each partner for a one-stop overview of associated transactions and interactions, accessible by enterprise users.

See Chapter 4, "Creating Partner Programs," page 11 and Chapter 7, "Setting Up and Managing Partner Registration," page 57.

Partner Portal

With the Partner Portal solution, enterprises can quickly disseminate timely product information and third-party or legacy system content to partner users. The Enterprise Portal solution facilitates the building of a partner community and content-rich destination. While the PRM partner-facing applications and user interfaces are already accessible via an intuitive, easy-to-navigate portal interface, the Partner Portal solution enhances the transactional experience. Third-party and internal content can be presented to partner users in an integrated portal experience. The Partner Portal solution consolidates PeopleSoft transactions with other internal and external web content to provide a one-stop gateway for partners to engage in business with the Enterprise.

Specific features include a separate partner portal registry delivered by PeopleTools, and partner-specific pagelets. These pagelets include recent quotes and orders by partner company or partner user, and recent orders by partner company or partner user. This Partner Portal solution consists of the following licensed applications:

- Partner Platform
- PeopleSoft Enterprise Portal
- PeopleSoft CRM Portal Pack

See *PeopleSoft Enterprise CRM Portal Pack 8.9 PeopleBook*.

Partner Collaborative Sales

Partner Collaborative Sales turns partners into virtual sales teams. Enterprises can distribute leads to partners based on multiple criteria and monitor the disposition of leads as they become qualified opportunities. Partner sales reps can receive leads, and easily accept or reject them in the Partner Portal. The result is increased revenues, motivated partners, and a more revenue-focused and productive partner sales channel.

Specific features include the extension of lead distribution to partner users for lead management and tracking. Data distribution rules are applied to control partner access to specific leads. You can secure partner access to data and functions on lead transactions, such as customer data, and you can enable partner sales representatives to create new leads. The Partner Collaborative Sales solution consists of the following licensed applications:

- PeopleSoft Partner Platform
- PeopleSoft Sales
- Partner Sales

See *PeopleSoft Enterprise Sales 8.9 PeopleBook.*

Partner Collaborative Commerce

Partner Collaborative Commerce gives partners the ability to drive sales together with the enterprise. Partners can browse relevant partner-specific product catalogs, configure complex products, and directly capture quotes and orders from an easy-to-use, highly configurable user interface. The pricing engine allows the enterprise to differentiate pricing among different groups of partners, as well as among individual partner companies. Partners can order products for simple inventory replenishment or take orders on behalf of customers, thus functioning as a virtual sales team to increase market penetration and increase economies of scale. From PeopleSoft Real-Time Advisor, partners can recommend the best products or solutions to their customers, while configuration tools (such as PeopleSoft Advanced Configurator) enable them to manage complex product or service configurations. For the communications, energy, financial services, and insurance sectors, partners can also handle service management requests from customers.

Specific features include the ability for partner representatives to log in to the enterprise and create and manage orders, quotes, and proposals. We have enabled data security to manage partner access to customers, catalogs, and specific quote and order maintenance functions. With respect to catalog management, the Enterprise Channel Manager can control partner access to products. With Partner Commerce, access to partner-specific catalogs can also be defined through PeopleSoft Order Capture. Partner Commerce also offers partner-specific pricing keys and partner specific holds. For holds, the enterprise is given the ability to configure order approval processing so that partners can manage specific holds. The Partner Collaborative Commerce solution consists of the following licensed applications:

- Partner Platform
- PeopleSoft Order Capture, Peoplesoft Advanced Configurator, and PeopleSoft RealTime Advisor
- Partner Commerce

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

Partner Lifecycle Marketing

Partner Lifecycle Marketing allows enterprises to collaboratively execute marketing campaigns both to and with their partner communities. Authorized partner team members can be added to marketing program and campaign teams as sponsors or participants. Enterprise marketing managers can extend brand awareness, offer partner promotions, and execute sophisticated partner recruitment campaigns to build their partner community. Partner Lifecycle Marketing also delivers advanced marketing planning tools that coordinate, track and execute a broad range of programs across multiple channels to end customers.

Specific features of Lifecycle Marketing include the ability to add partners to joint marketing programs and campaign teams as sponsors or active team participants. You can also allow partner access to a secured view of the collaborative marketing programs, campaigns, tasks, and associated notes. The enterprise can target marketing campaigns to partners, and enterprise marketing managers can plan and execute partner recruitment programs, extend brand awareness, and create partner promotions and offers to build the partner community. This Partner Lifecycle Marketing solution consists of the following licensed applications:

- Partner Platform
- PeopleSoft Marketing and PeopleSoft Partner Marketing
- PeopleSoft Online Marketing

See *PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook* and *PeopleSoft Enterprise Online Marketing 8.9 PeopleBook.*

Partner Strategic Planning

Partner Strategic Planning gives Enterprise channel and alliance managers a flexible tool to create joint partner business plans and define specific objectives, targets, and goals. Over time, actual performance can be compared to targets and forecasts for variance analysis and evaluation of key success factors or reasons for underperformance. This Partner Strategic Planning solution consists of the following licensed applications:

- Partner Platform
- PeopleSoft Portfolio Management
- PeopleSoft Strategic Account Planning
- Partner Planning

See *PeopleSoft Enterprise Strategic Account Planning 8.9 PeopleBook.*

CHAPTER 3

Navigating in PeopleSoft Partner Relationship Management

This chapter discusses how to navigate in PeopleSoft Partner Relationship Management.

Navigating in PeopleSoft Partner Relationship Management

PeopleSoft Partner Relationship Management provides functional area navigation pages that support a specific set of business processes or tasks.

Note. In addition to the PeopleSoft Partner Relationship Management functional area navigation pages, PeopleSoft provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

See Also

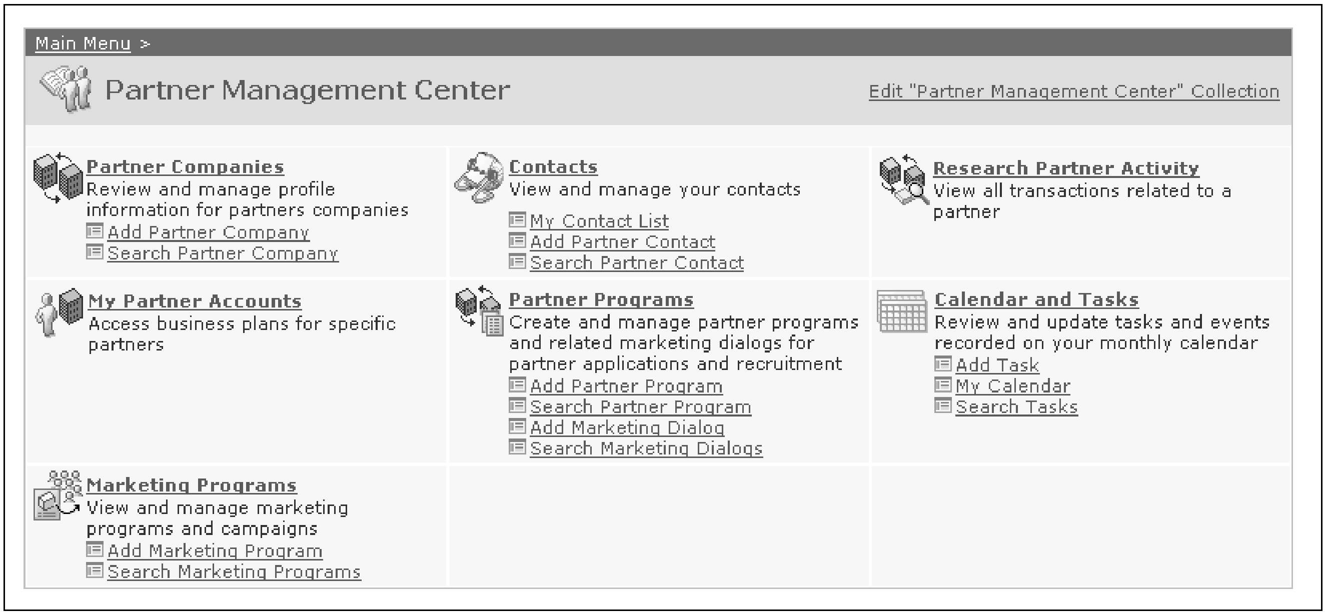
Using PeopleSoft Applications

Pages Used to Navigate in PeopleSoft Partner Relationship Management

This table lists the custom functional navigation pages that are used to navigate in PeopleSoft Partner Relationship Management:

Partner Management Center

The Partner Management Center page is geared to the person in your organization who is focused on the partner business process. In PeopleSoft Partner Relationship Management, this would normally be the Enterprise Channel Manager.



Partner Management Center page

Page Name	Navigation	Usage
Partner Management Center	Main Menu, Partner Management Center	Manage all partner activities.
Partner Company	Click the Partner Companies link on the Partner Management Center page.	Add and manager profile information for partners companies.
My Contacts	Click the Contacts link on the Partner Management Center page.	Access the My Contacts page to view and manage your partner contacts.
360–Degree View	Click the Research Partner Activity link on the Partner Management Center page.	Access the 360–Degree View to view all transactions related to a partner.
My Accounts	Click the My Partner Accounts link on the Partner Management Center page.	Access business plans for specific partners.
Partner Programs	Click the Partner Programs link on the Partner Management Center page.	Access the Partner Program page to add a new partner program.
Dialogs	Click the Partner Programs link on the Partner Management Center page.	Access the dialog designer to create or edit marketing dialogs for the purposes of building partner registration dialogs.
Calendar and Tasks	Click the Calendar and Tasks link on the Partner Management Center page.	Access your monthly calendar to update or review tasks and events.
Marketing Programs	Click the Marketing Programs link on the Partner Management Center page.	Access marketing programs and campaigns.

CHAPTER 4

Creating Partner Programs

This chapter provides an overview of the PeopleSoft Partner Relationship Management partner programs and discusses how to:

- Set up the partner program environment.
- Create dialogs for partner programs.
- Create partner programs.

Understanding PeopleSoft Partner Relationship Programs

PeopleSoft delivers statuses, steps, actions, and several predefined types to automatically enable PeopleSoft Partner Relationship Management. To take full advantage of the PeopleSoft Partner Relationship Management application, you should review your business processes and determine if there are any additional Partner Relationship Management types or characteristics that might be appropriate for your business.

Setting Up the Partner Program Environment

This section discusses how to:

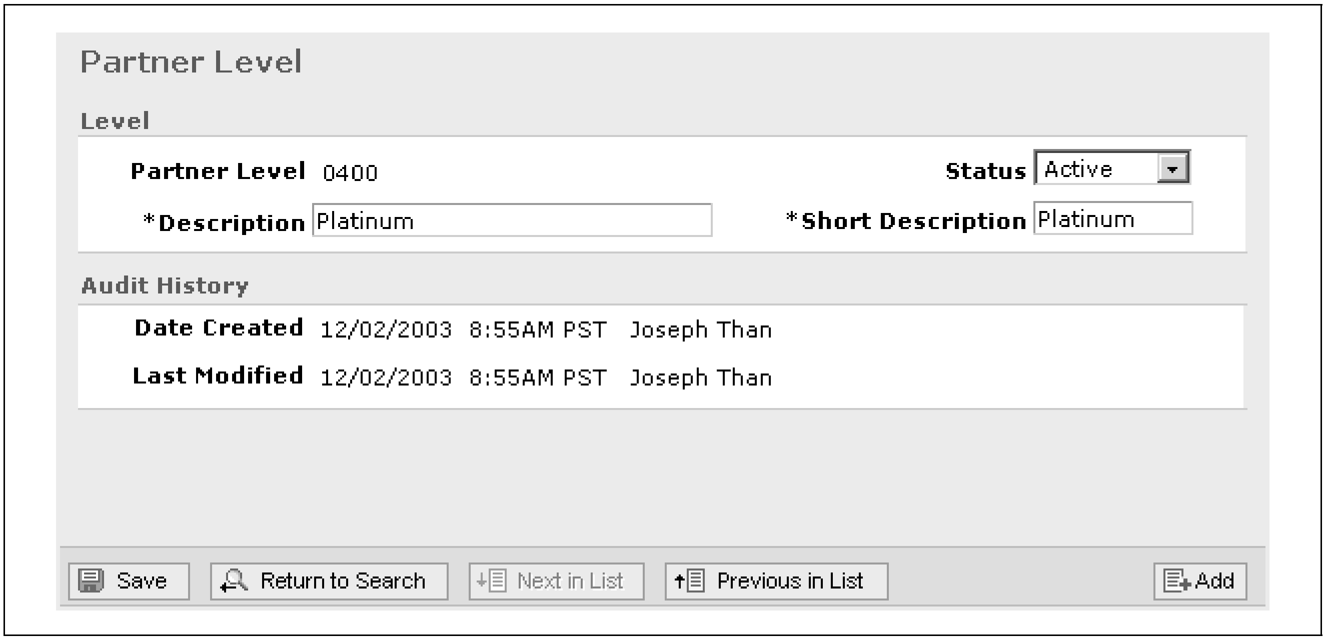
- Define partner levels.
- Define partner types.
- Define partner subtypes.
- Define program requirements.
- Define program benefits.
- Define program fees.
- Define certifications.
- Define training.
- Define market segments

Pages Used to Set Up The Partner Program Environment

Page Name	Object Name	Navigation	Usage
Partner Level	RD_PR_LEVEL	Set Up CRM, Product Related, Partner Management, Partner Levels, Partner Level	Define partner levels that enable the enterprise to group partners and determine partner privileges.
Partner Type	RD_PR_TYPE	Set Up CRM, Product Related, Partner Management, Partner Types/Subtypes, Partner Type	Define partner types such as alliance, channel, fulfillment.
Partner Subtype	RD_PR_SUBTYPE	Set Up CRM, Product Related, Partner Management, Partner Types/Subtypes, Partner Type, Partner Subtype	Define partner subtypes for your partner types. Examples might be a reseller, a broker, or an agent.
Partner Program Requirement	RD_PR_PGM_REQ	Set Up CRM, Product Related, Partner Management, Program Requirements, Partner Program Requirement	Establish available program requirements for partners.
Partner Program Benefit	RD_PR_PGM_BEN	Set Up CRM, Product Related, Partner Management, Program Benefits, Partner Program Benefit	Establish partner program benefits.
Partner Program Fees	RD_PR_PGM_FEE	Set Up CRM, Product Related, Partner Management, Program Fees	Establish fees for the programs.
Certification	RD_CERTIFICATION	Set Up CRM, Product Related, Partner Management, Certifications, Certification	Add certifications for partners.
Training	RD_TRAINING	Set Up CRM, Product Related, Partner Management, Training, Training	Add training relevancies for partner programs.
Market Segment	RD_MARKET_SEG	Set Up CRM, Product Related, Partner Management, Market Segments, Market Segment	Add market segments for partners.

Defining Partner Levels

Access the Partner Level page.



Partner Level page

Level

Partner Level Unique alphanumeric identifier that is manually assigned to each level defined.

Status *Active:* The Partner Level can be used on Partner Programs.

Inactive: The Partner Level can not be used on Partner Programs.

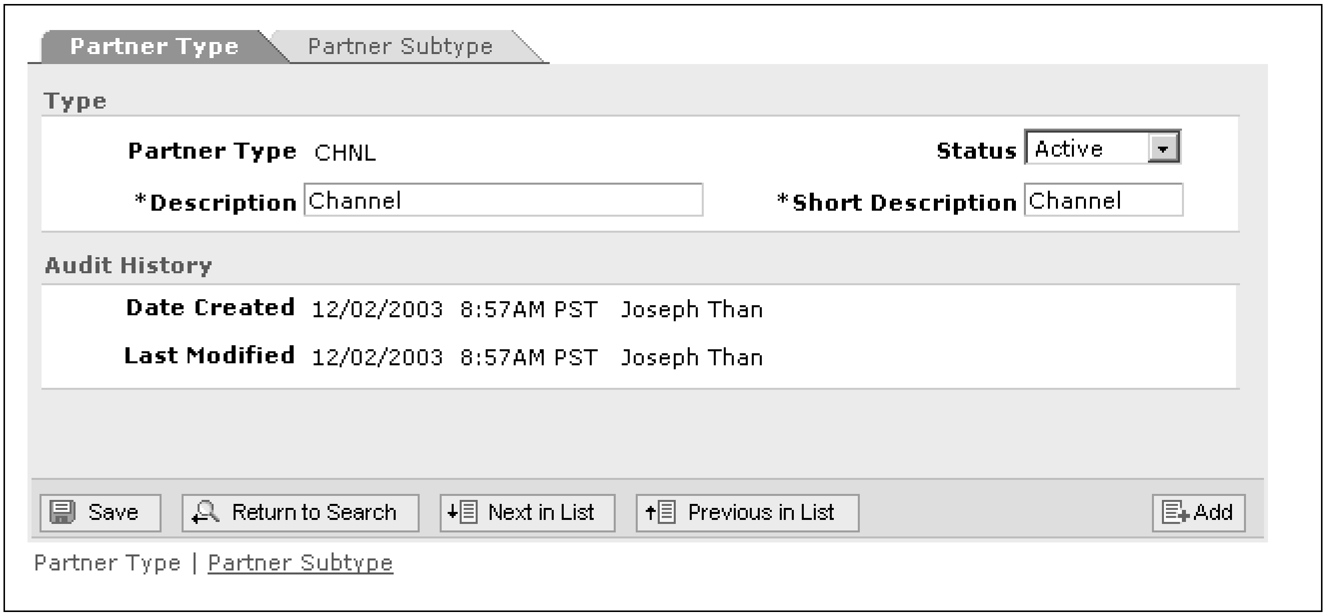
Audit History

Date Created Displays the original date, time, and author of the page.

Date Modified Displays when and by whom the page was last modified.

Define Partner Types

Access the Partner Type page.



Partner Type page

Type

In sample data, PeopleSoft CRM delivers three partner types. Examples of this could be*Alliance (ALLC)*, *Channel (CHNL)*, and *Service/Fulfillment (SVC)*.

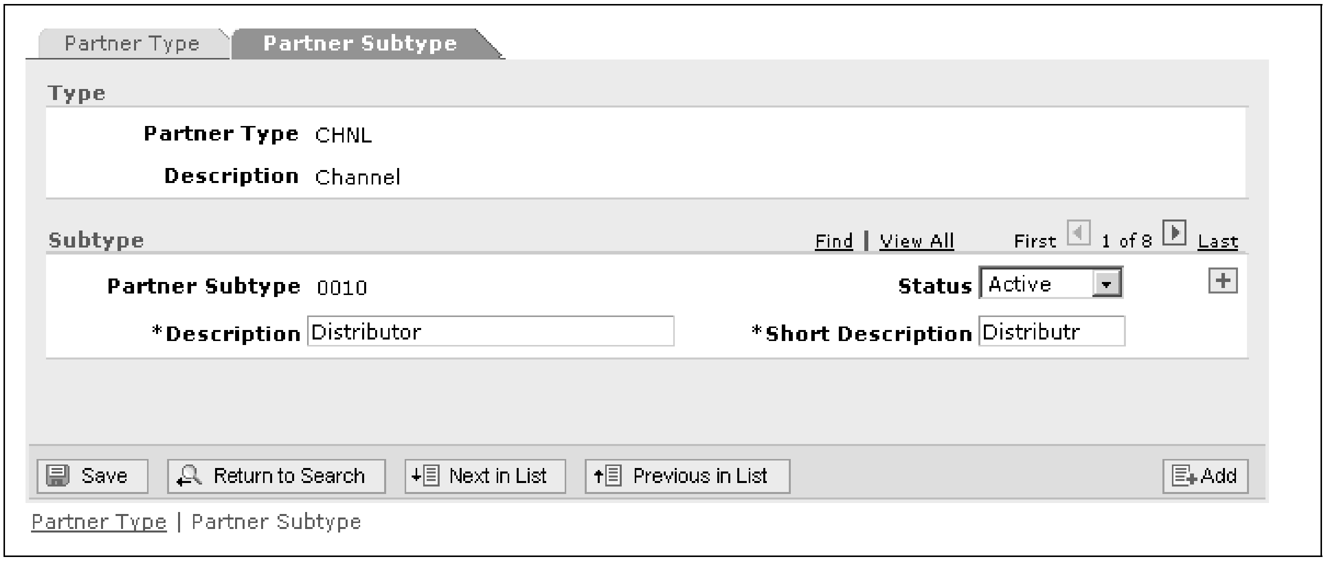
Partner Type	View unique alphanumeric identifier.
Status	*Active:* The Partner Type can be used on Partner Programs. *Inactive:* The Partner Type can not be used on Partner Programs.

Audit History

Date Created	Displays the original date, time, and author of the page.
Date Modified	Displays when and by whom the page was last modified.

Defining Partner Subtypes

Access the Partner Subtype page.



Partner Subtype page

Type

Partner Type View unique alphanumeric identifier.

Subtype

For the alliance and channel partner types, PeopleSoft CRM delivers eight (8) subtypes in sample data. For the Service / Fulfillment partner type, there are seven (7) subtypes in sample data. For the Partner Type of *ALLIANCE*, the eight subtypes are *System Integrator (0010)*, *Consultant (0020)*, *Independent Software Vendor (0030)*, *Advisor (0040)*, *Analyst (0050)*, *Strategic Alliance Partner (0060)*, *Joint Marketing Partner (0070)*, and *Development Partner (0080)*

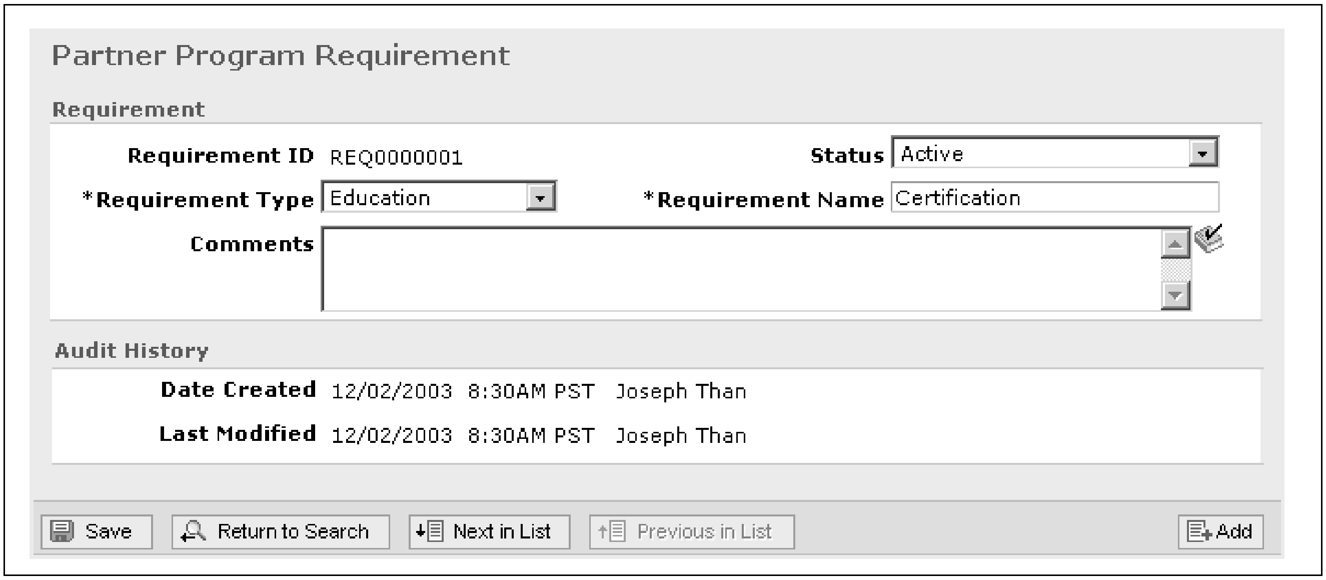
For the Partner Type of *CHANNEL*, the eight subtypes are *Distributor (0010)*, *Reseller (0020)*, *Agent (0030)*, *Broker (0040)*, *Wholesaler (0050)*, *Dealer (0060)*, *Value-Added Reseller (0070)*, and *Value-Added Distributor (0080)*

For the Partner Type of *Service / Fulfillment*, the seven subtypes are *Content Provider (0010)*, *Installation Provider (0020)*, *Repair Services Provider (0030)*, *Outsourced Call Center Vendor (0040)*, *Outsourced Service Provider (0050)*, *Application Outsourcing Services (0060)*, and *Managed Services Provider (0070)*.

Partner Subtype View or add a unique numerical identifier.

Defining Partner Program Requirements

Access the Partner Program Requirement page.



Partner Program Requirement page

Requirement

Requirement ID View unique alphanumeric identifier.

Requirement Type Select a requirement type. PeopleSoft CRM delivers seven (7) requirement types. These are translate values, and therefore you can only modify or add to these in PeopleTools Application Designer. The requirement types available for selection are *Contract*, *Education*, *Financial*, *Market Coverage*, *Market*, *Planning and Performance*, and *Staffing*.

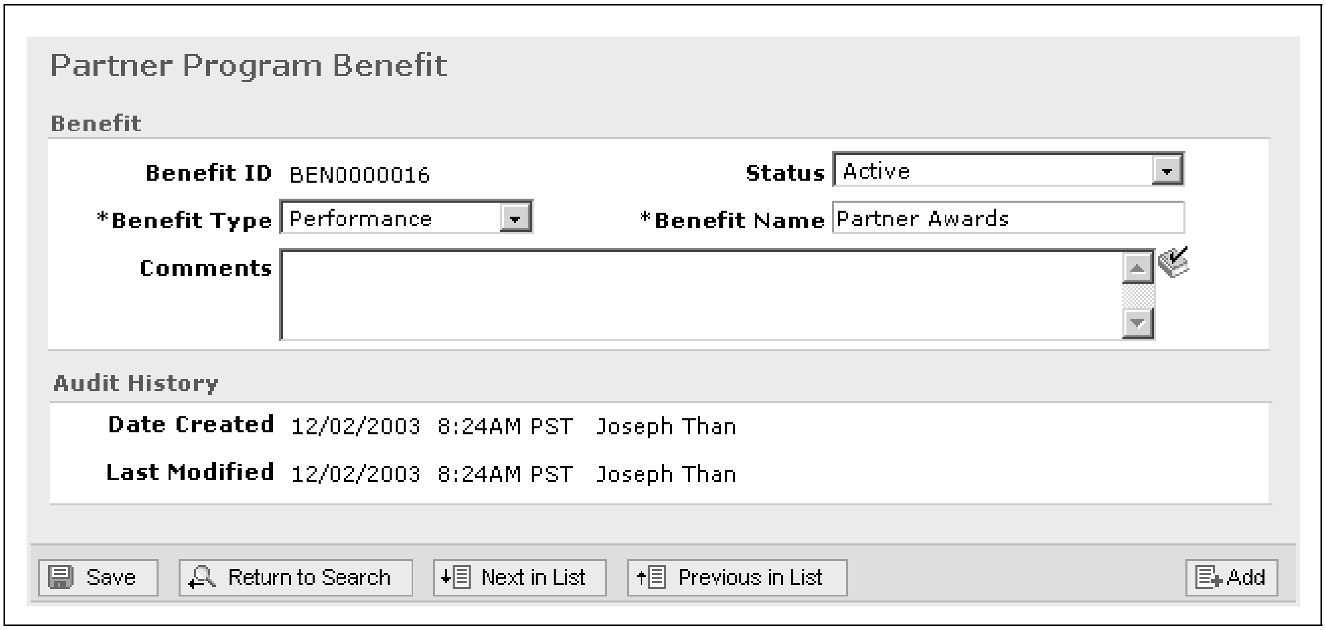
Audit History

Date Created Displays the original date, time, and author of the page.

Date Modified Displays when and by whom the page was last modified.

Defining Program Benefits

Access the Partner Program Benefit page.



Partner Program Benefit page

Benefit

Benefit ID View unique alphanumeric identifier.

Benefit Type Select a benefit type. PeopleSoft CRM delivers seven (6) benefit types. These are translate values, and therefore you can only modify or add to these in PeopleTools Application Designer. The benefit types available for selection are *Education*, *Financial*, *Interactions*, *Marketing*, *Performance*, and *Support*.

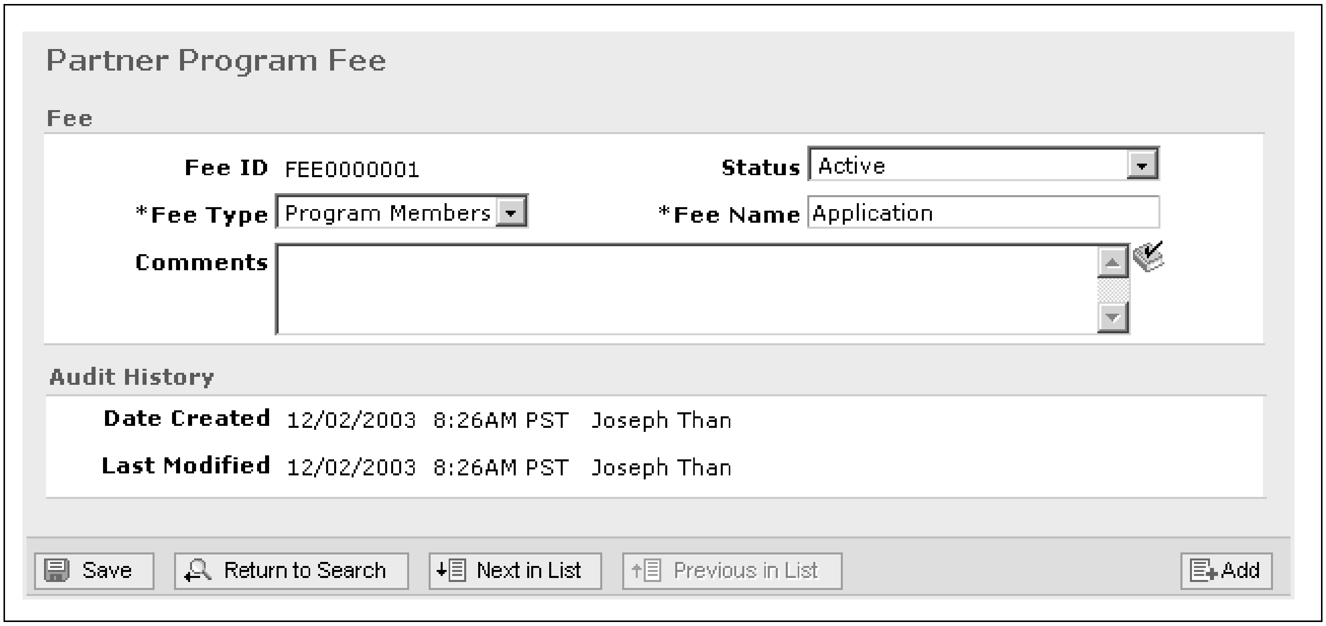
Audit History

Date Created Displays the original date, time, and author of the page.

Date Modified Displays when and by whom the page was last modified.

Defining Program Fees

Access the Partner Program Fee page.



Partner Program Fee page

Fee

Fee Type Select a fee type. PeopleSoft CRM delivers three (3) fee types. These are translate values, and therefore you can only modify or add to these in PeopleTools Application Designer. The fee types available for selection are *License*, *Marketing*, and *Program Membership.*

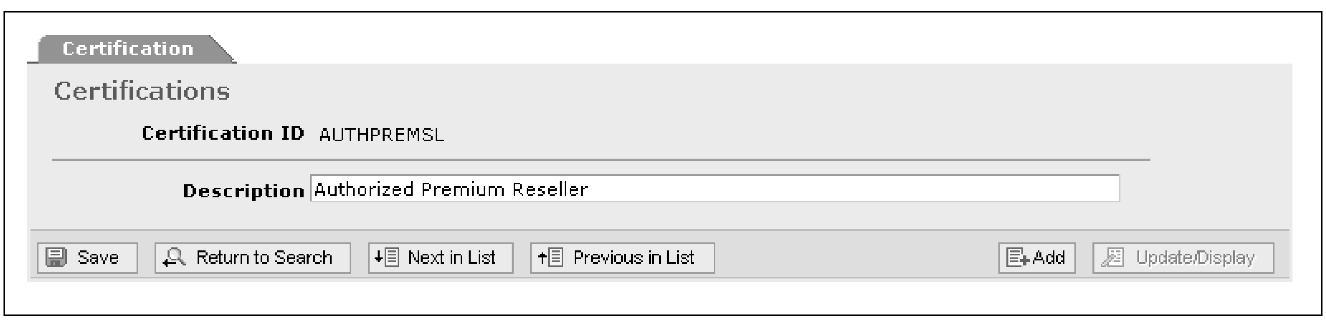
Audit History

Date Created Displays the original date, time, and author of the page.

Date Modified Displays when and by whom the page was last modified.

Defining Certifications

Access the Certification page.



Certification page

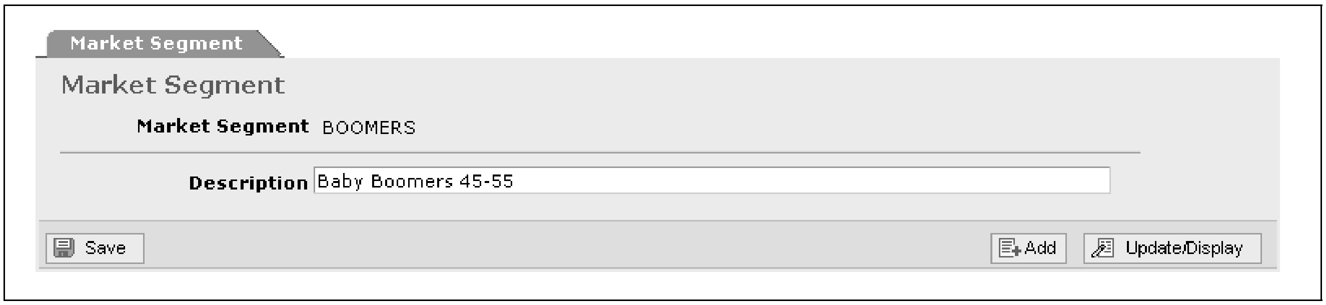
Defining Training

Access the Training page.

Training page

Defining Market Segments

Access the Market Segment page.



Market Segment page

Note. PeopleSoft CRM delivers no market segments out of the box.

Creating Dialogs for Partner Programs

This section provides an overview of dialogs, and discusses how to:

- Create a partner registration logic using the dialog designer.
- Use the document page in document designer to tailor the look and feel of the dialog.
- Use the Document Designer page to define specific display preferences.

Dialog Use in Partner Programs

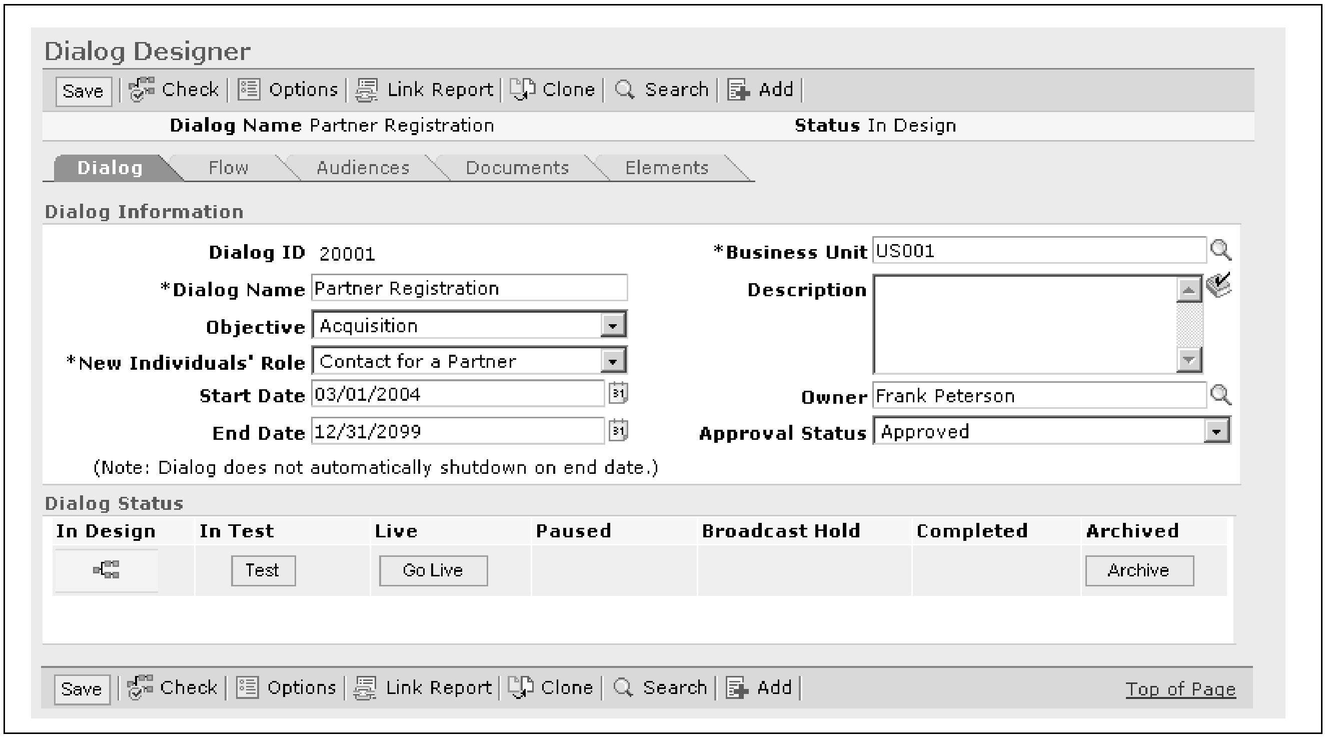
Dialogs are actually created for the self-service partner registration process. However, when you define a partner program, you are asked to associate a partner registration dialog with that program. For you to do this, a registration dialog must already exist in the system, which means that you may want to create your partner registration dialogs first, although the assignment of a dialog to a partner program is optional.

Pages Used to Create Dialogs

Page Name	Object Name	Navigation	Usage
Dialog	RY_DIALOG	Marketing, Dialog Designer, Dialog	Create a dialog for partner registration.
Document	RY_DOC	Marketing, Document Designer, Document	Create the display preferences for the dialog.
Designer	RY_DOC_DESIGNER	Marketing, Document Designer, Document, Designer	Design the partner registration document.

Create Partner Registration Logic Using Dialog Designer

Access the Dialog page.



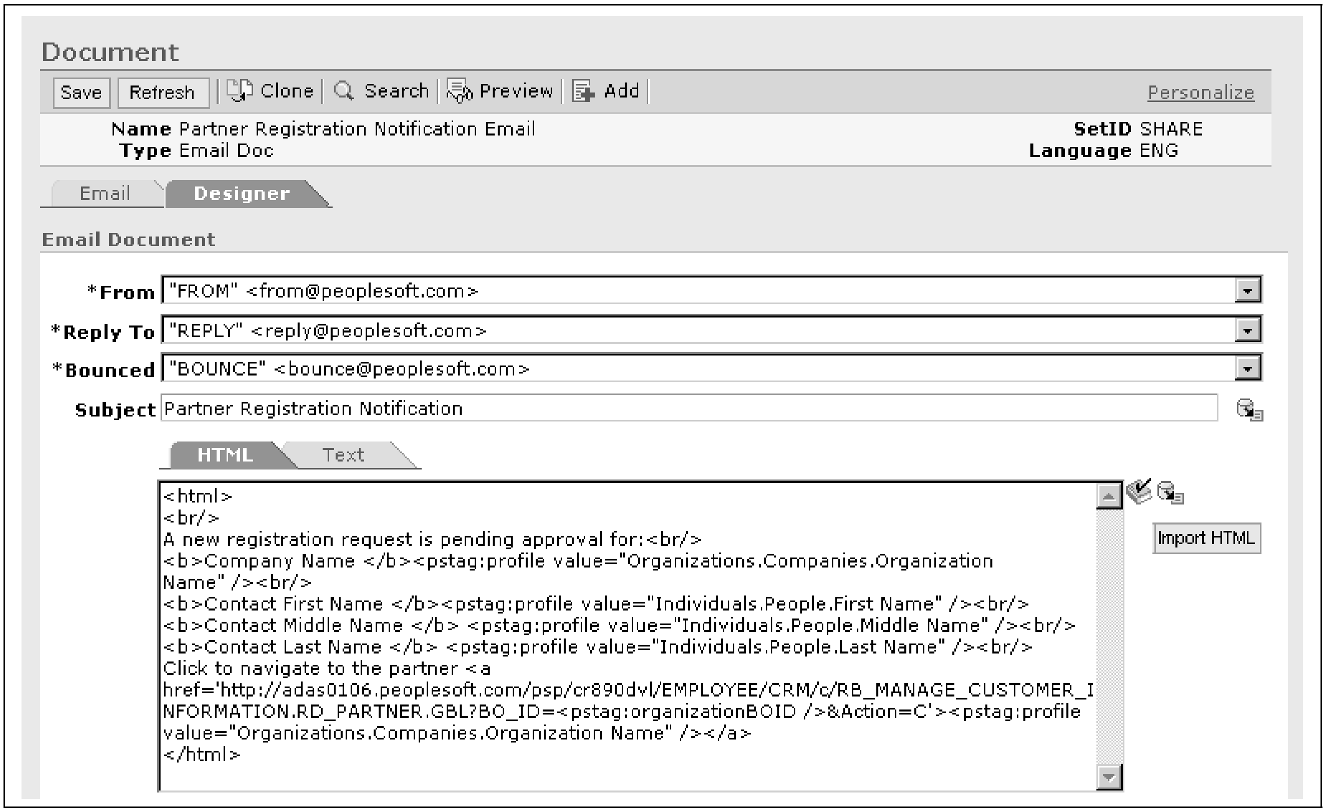
Dialog page

See Also

PeopleSoft Enterprise Online Marketing 8.9 PeopleBook, “Designing Online Dialogs”

Using the Document Page in Document Designer

Access the Document page.



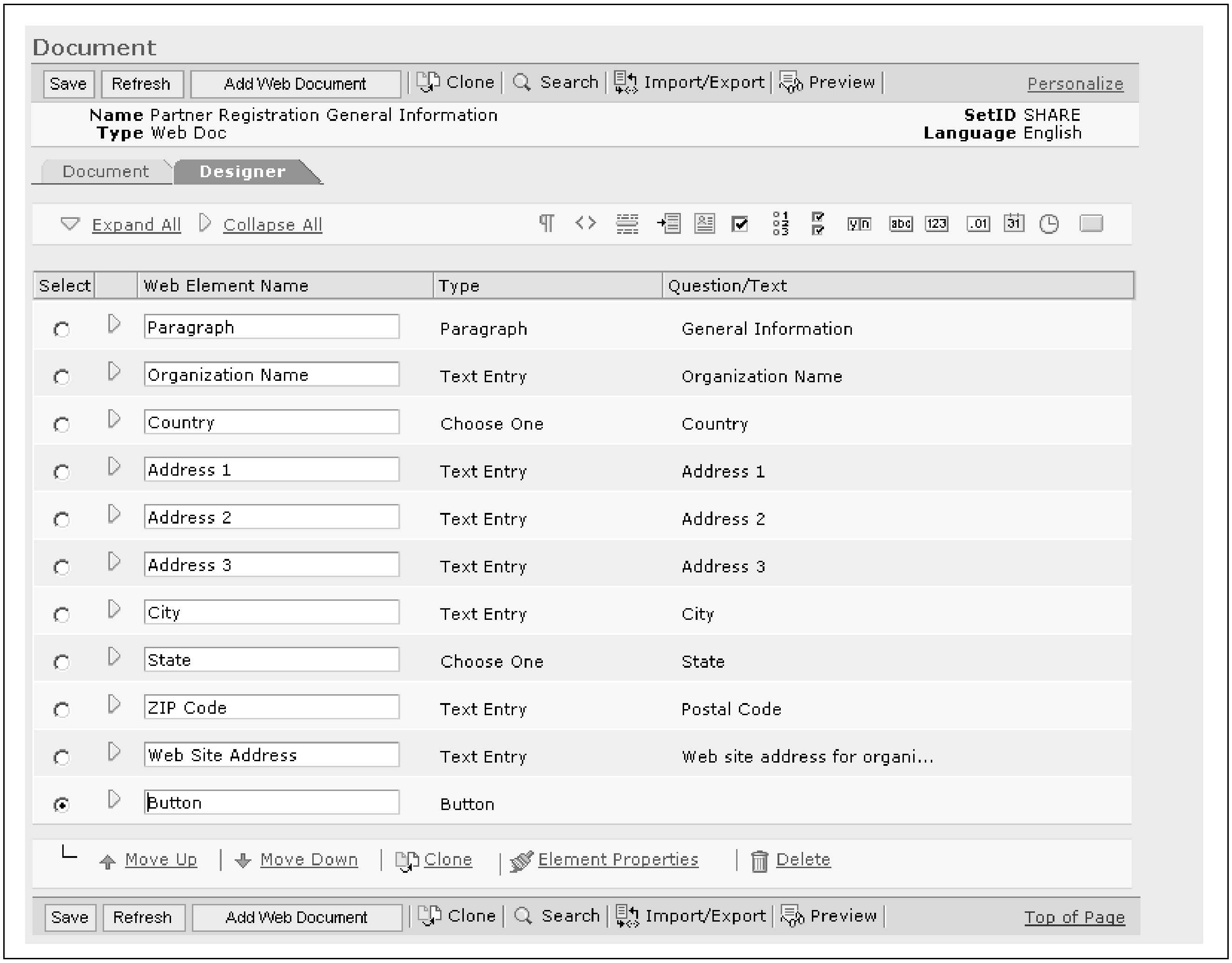
Document page

See Also

PeopleSoft Enterprise Online Marketing 8.9 PeopleBook, "Designing Online Dialogs"

Using the Designer Page in Document Designer

Access the Designer page.



Designer page

See Also

PeopleSoft Enterprise Online Marketing 8.9 PeopleBook, “Designing Online Dialogs”

Creating Partner Programs

This section explains how to:

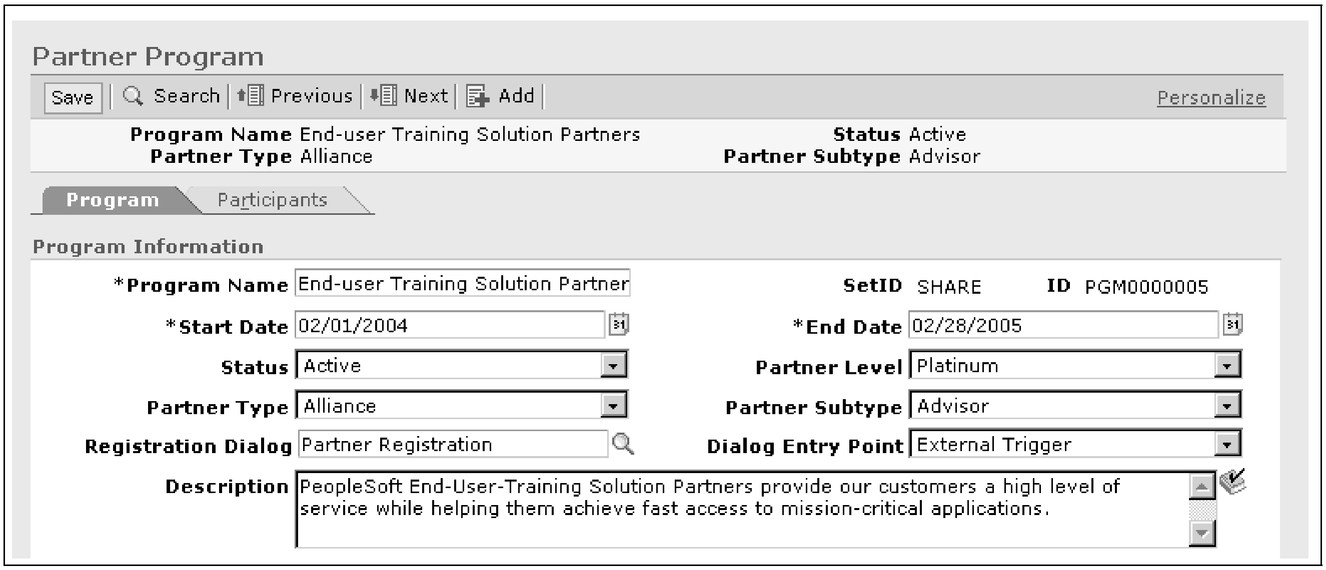
- Define partner programs.
- View partner program participants.

Pages Used to Create Partner Programs

Page Name	Object Name	Navigation	Usage
Partner Program	RD_PR_PROG	Partners CRM, Add Partner Program	Add a partner program
Partner Program — Participants	RD_PR_PROG_PARTIC	Partners CRM, Add Partner Program, Participants	View, edit, or add partner companies that are program participants,

Defining Partner Programs

Access the Partner Program page.



Partner Program page

Program Information

Program Name Enter a name for the partner program.

Start Date This is the date the program will go into effect.

End Date This is the date the program will no longer be in effect.

Status *Active:* The program can be associated with partners.

Inactive: The program can not be associated with partners.

Pending: The program is being created, but can not yet be associated with partners.

Partner Level Choose a partner level.

Partner Type Select a partner type.

Partner Subtype Select a partner subtype.

Registration Dialog Select the partner registration dialog that you want to associate with the partner program

Dialog Entry Point	Enter the point at which the dialog will fire.

Note. You must identify a specific registration dialog in the previous field before you can select an entry point.

Description	Enter a summary description of the partner program.

Requirements

Choose all the partner requirements that you want to associate with this partner program.

Benefits

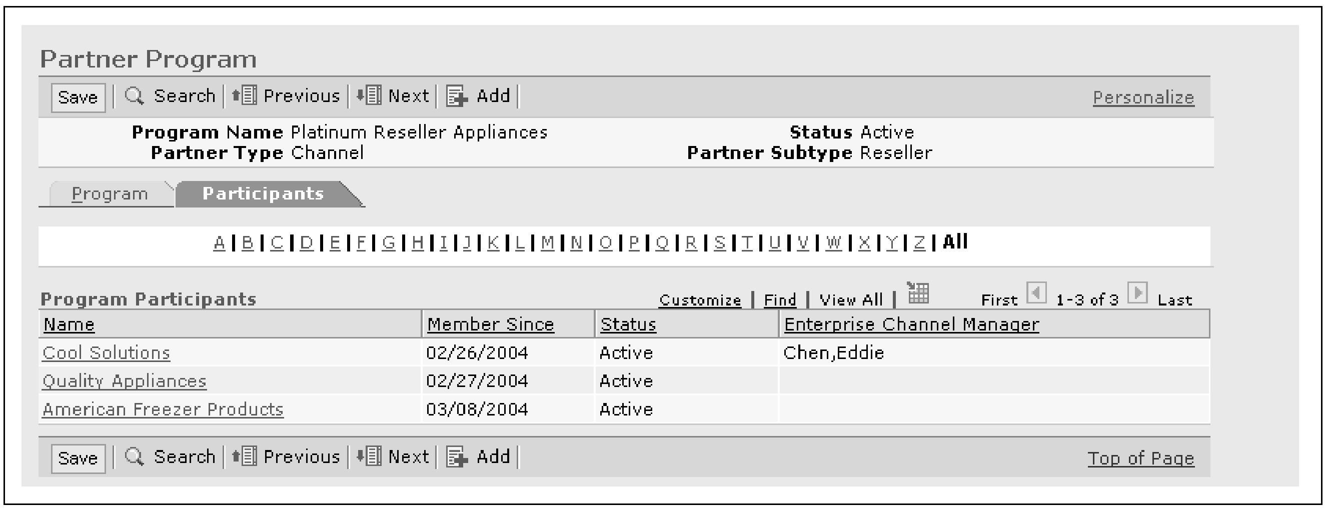
Choose all the partner benefits that you want to associate with this partner program.

Fees

Choose all the partner fees you want to associate to this partner program.

Viewing Partner Program Participants

Access the Partner Program — Participants page.



Partner Program — Participants page

On this page, you can view those partner companies that are associated with this program. The alphabetical sorting search feature allows you to quickly identify partner companies. If you drill into the partner company name you will see a summary of that company. You can also add a partner company to this partner program.

Note. If you want to add an entirely new partner company to the enterprise system you must return to the Partner Company page.

CHAPTER 5

Creating and Maintaining Partner Profiles

This chapter provides an overview of the partner company profile and explains how to:

- Create and manage partner companies.
- Create and manage partner users.
- Add partner contacts.

Understanding Partner Profiles

As part of on going Partner relationship management, the Enterprise needs to be able to maintain the Partner profile in the following scenarios:

- Add new partners.
- Update partner profile attributes.
- Terminate existing partners.
- Reactivate terminated partners.

Partner profile information is the center of the Partner Relationship Management universe. As part of the overall Partner Platform solution, Partner Profile allows the Enterprise Channel Manager to manage profile data and allow other partner processes, such as application security and partner registration, to retrieve and update business object data. The Enterprise Channel Manager can create new Partner Profile data. New Partner profiles can be created by the following means:

- Through the self-service registration process.

  In this case, the partner provides information over the web without action by the Enterprise.

- Data entry from paper applications.

  In this case, and Enterprise would be responsible for manual data entry.

- Augmentation of an existing customer, meaning the adding of a Partner role.

  This privilege is only to the appropriate Enterprise Channel Manager(s), and is not accessible to all Enterprise users. PeopleSoft CRM provides a facility for the Enterprise Channel Manager to create and maintain partner profile data.

Note. Quick Create functionality is disabled for the Partner Role Type. We do not allow Quick Create to create partner companies because enabling the feature would circumvent the standard partner registration approval process.

Partner Profile Terminology

Augmentation
This refers to adding a partner role to an existing company.

Business Object (BO)
Practically all objects in the PeopleSoft CRM Customer Data Model (or BORM) are considered business objects. There are three types of business objects:

1. Organization. (For example, a company, partner, or site)
2. Individual. (For example, a worker, consumer, or contact).
3. Other Database Object. (For example, an account).

Enterprise
This refers to the organization that is deploying PeopleSoft PRM. This is the PeopleSoft customer.

Enterprise Channel Administrator
Employee of the Enterprise who is responsible for administering the Partner Relationship Management system. This could be the same role as the Enterprise Administrator, or the same role as the Enterprise Channel Manager, depending on the size of the Partner management organization. This role is slightly more technically-oriented because it involves an understanding of system setup and configuration for functions such as security and privileges.

Enterprise Channel Manager
Employee of the Enterprise who is responsible for managing specific Partner relationships.

Enterprise Alliance Manager (EAM)
Enterprise Alliance Manager is another valid role that is similar to ECM. An EAM is someone who manages alliance partners.

Partner
An organization that sells products or services on behalf of the Enterprise.

Partner Contact
A representative for the partner organization. This is usually an employee of the partner organization.

Partner Registration
This refers to the self-service facility that prospective partners use to apply to become enterprise partners.

Partner Relationship Administrator/Manager
Employee of the partner organization who is responsible for administering the relationship with the Enterprise, or managing the relationship with the Enterprise.

Partner Search
The business object search engine in PeopleSoft CRM allows users to search for partner business objects.

Creating and Managing Partner Companies

This section explains how to:

- View partner company information.
- Update partner company information.
- Enter market coverage information.

- View catalogs.
- Maintain competency, training, and certification information.
- View the partner company's access to customer data.
- View the partner company's sales organization tree.
- Maintain the partner company's customer references.
- Maintain resale tax certificate information.
- View partner program history.
- Maintain the account team assigned to the partner.
- Maintain partner-related tasks.
- View partner call reports.
- Maintain partner business plans.
- Enter and update partner company notes.
- Maintain partner company contacts.
- Maintain partner company address, phone, and email information.
- View and maintain partner relationships.
- Maintain marketing profile information.

Pages Used to Create and Manage Partner Companies

Page Name	Object Name	Navigation	Usage
Partner Company - Summary	RD_PARTNER_SUMMARY	Partners CRM, Search Partner Company, Partner Company, Summary	View a summary of partner company information.
Partner Company - Details	RD_PARTNER_DETAILS	• Partners CRM, Add Partner Company, Partner Company, Details • Partners CRM, Search Partner Company, Partner Company, Summary Click the Details link.	Update general partner company information.
Partner Company - Summary: Market	RD_PTNR_MARKET	• Partners CRM, Add Partner Company, Partner Company Click the Market link. • Partners CRM, Search Partner Company, Partner Company Click the Market link.	Enter market coverage information that describes the target market that the partner services.

Page Name	Object Name	Navigation	Usage
Partner Company - Summary: Products	RD_PTNR_PRODUCTS	• Partners CRM, Add Partner Company, Partner Company Click the Products link. • Partners CRM, Search Partner Company, Partner Company Click the Products link.	View catalogs to which the partner has access.
Partner Company - Summary: Expertise	RD_PTNR_EXPERTISE	• Partners CRM, Add Partner Company, Partner Company Click the Expertise link. • Partners CRM, Search Partner Company, Partner Company Click the Expertise link.	Maintain competency, training, and certification information.
Partner Company - Summary: Security	RD_PTNR_SECURITY	• Partners CRM, Add Partner Company, Partner Company Click the Security link. • Partners CRM, Search Partner Company, Partner Company Click the Security link.	View the partner company's access to customer data.
Partner Company - Summary: Organization	RD_PTNR_ORG	• Partners CRM, Add Partner Company, Partner Company Click the Organization link. • Partners CRM, Search Partner Company, Partner Company Click the Organization link.	View the partner company's sales organization tree.
Partner Company - Summary: References	RD_PTNR_REFERENCES	• Partners CRM, Add Partner Company, Partner Company Click the References link. • Partners CRM, Search Partner Company, Partner Company Click the References link.	Maintain the partner company's references from customers.

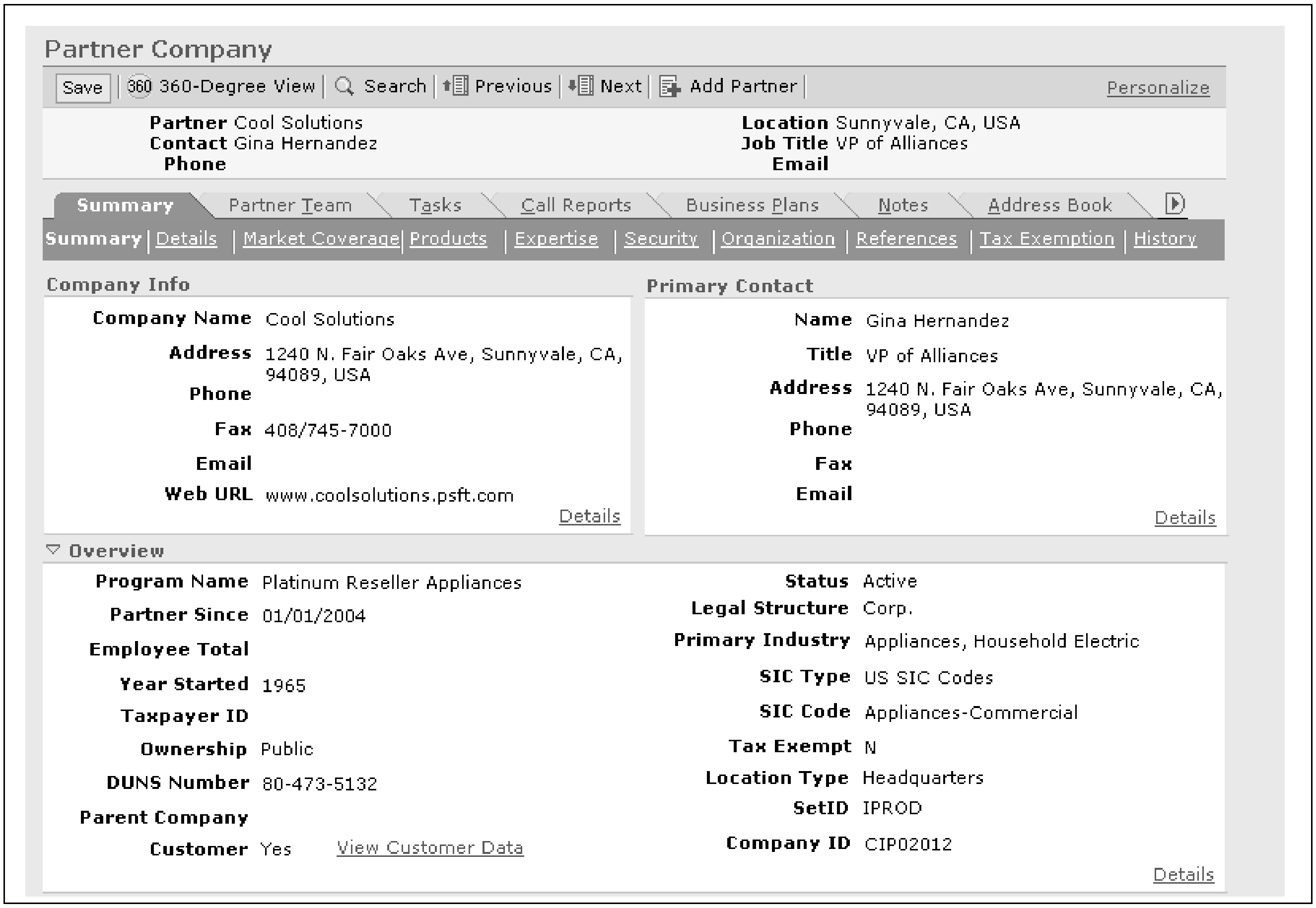
Page Name	Object Name	Navigation	Usage
Partner Company - Summary: Tax Exemption	RD_PTNR_TAX_EXEMPT	• Partners CRM, Add Partner Company, Partner Company Click the Tax Exemption link. • Partners CRM, Search Partner Company, Partner Company Click the Tax Exemption link.	Maintain resale tax certificate information.
Partner Company - Summary: History	RD_PTNR_HISTORY	• Partners CRM, Add Partner Company, Partner Company Click the History link. • Partners CRM, Search Partner Company, Partner Company Click the History link.	View the partner program history for the partner company.
Partner Company - Partner Team	RD_ACCOUNT_TEAM	• Partners CRM, Add Partner Company, Partner Company Select the Partner Team tab. • Partners CRM, Search Partner Company, Partner Company Select the Partner Team tab.	Maintain the account team that is assigned to the partner.
Partner Company - Tasks	RD_TASK_LIST	• Partners CRM, Add Partner Company, Partner Company Select the Task List tab. • Partners CRM, Search Partner Company, Partner Company Select the Task List tab.	Maintain tasks that are related to the partner.
Partner Company - Call Reports	RD_CALLRPT_LST_TXN	• Partners CRM, Add Partner Company, Partner Company Select the Call Reports tab. • Partners CRM, Search Partner Company, Partner Company Select the Call Reports tab.	View call reports for the partner.

Page Name	Object Name	Navigation	Usage
Partner Company - Business Plans	RD_ACCOUNT_PLAN	• Partners CRM, Add Partner Company, Partner Company Select the Business Plans tab. • Partners CRM, Search Partner Company, Partner Company Select the Business Plans tab.	Maintain partner company business plans.
Partner Company - Notes	RD_NOTES	• Partners CRM, Add Partner Company, Partner Company Select the Notes tab. • Partners CRM, Search Partner Company, Partner Company Select the Notes tab.	Enter and update partner company notes.
Partner Company - Contacts	RD_PTNR_CONTACTS	• Partners CRM, Add Partner Company, Partner Company Select the Address Book tab. Click the Contacts link. • Partners CRM, Search Partner Company, Partner Company Select the Address Book tab. Click the Contacts link.	Maintain partner company contacts.
Partner Company - Address Book	RD_PTNR_ADDR_BOOK	• Partners CRM, Add Partner Company, Partner Company Select the Address Book tab. Click the Addresses link. • Partners CRM, Search Partner Company, Partner Company Select the Address Book tab. Click the Addresses link.	Maintain partner company address, phone, and email information.

Page Name	Object Name	Navigation	Usage
Partner Company - Relationships	RD_COMPANY_REL	• Partners CRM, Add Partner Company, Partner Company Select the Relationships tab. • Partners CRM, Search Partner Company, Partner Company Select the Relationships tab.	View and maintain partner relationships.
Partner Company - More Info	RD_PROFILE	• Partners CRM, Add Partner Company, Partner Company Select the More Info tab. • Partners CRM, Search Partner Company, Partner Company Select the More Info tab.	Maintain marketing profile information.

Viewing Partner Company Information

Access the Summary page.



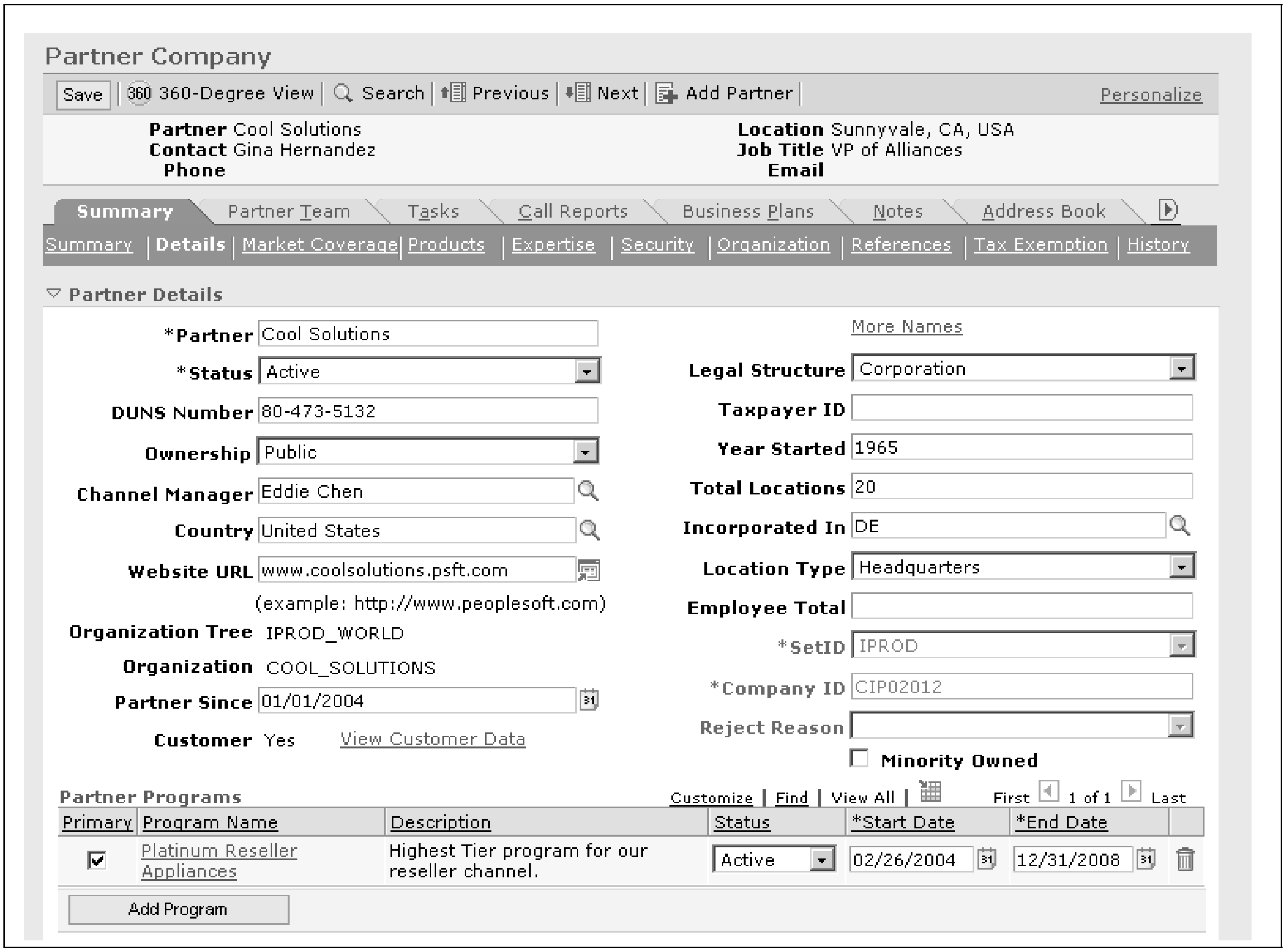
Partner Summary page

Company Info

View all relevant company data.

Updating Partner Company Information

Access the Partner Company - Details page.



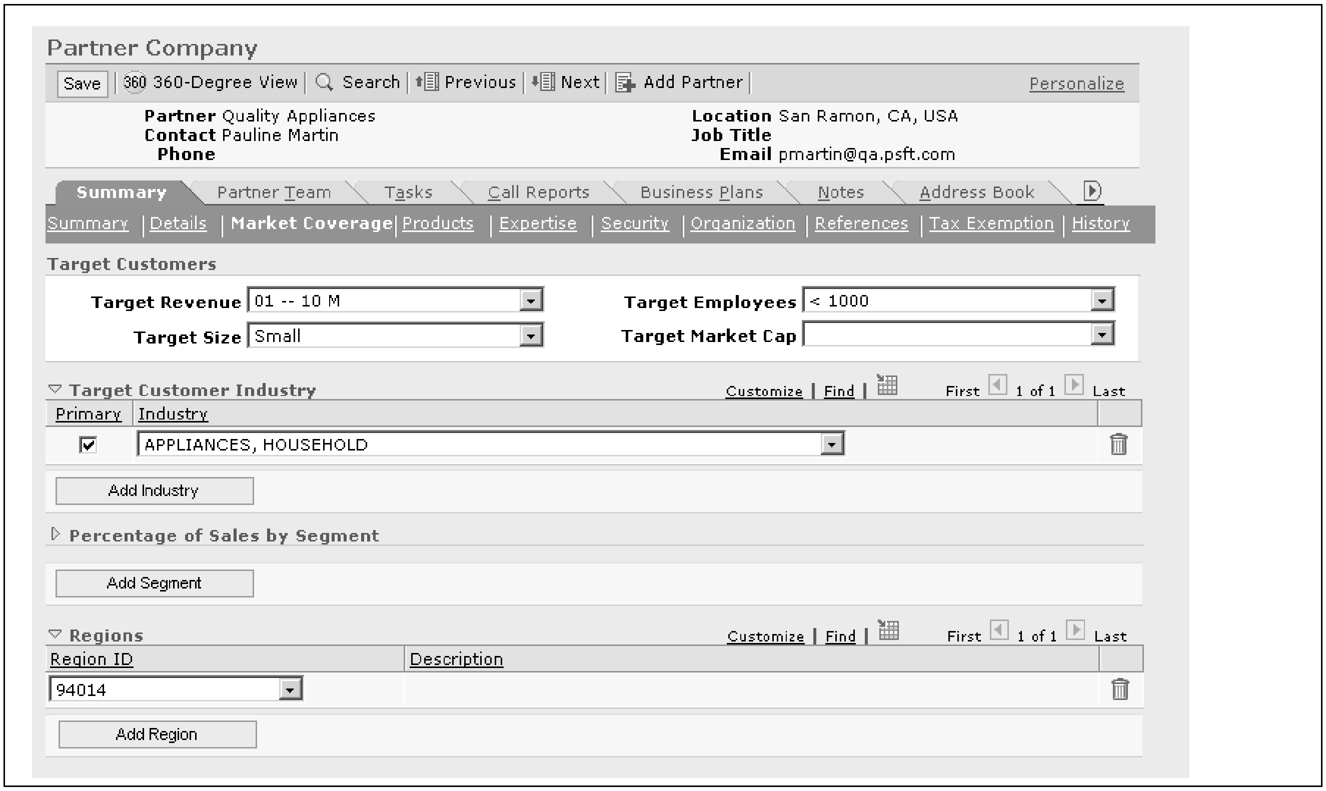
Partner Company - Details page

The Partner Program is linked to the partner on this page. The partner must be linked to an active partner in order to save the page.

Partner and **Program** These fields are required fields for the partner.

Entering Market Coverage Information

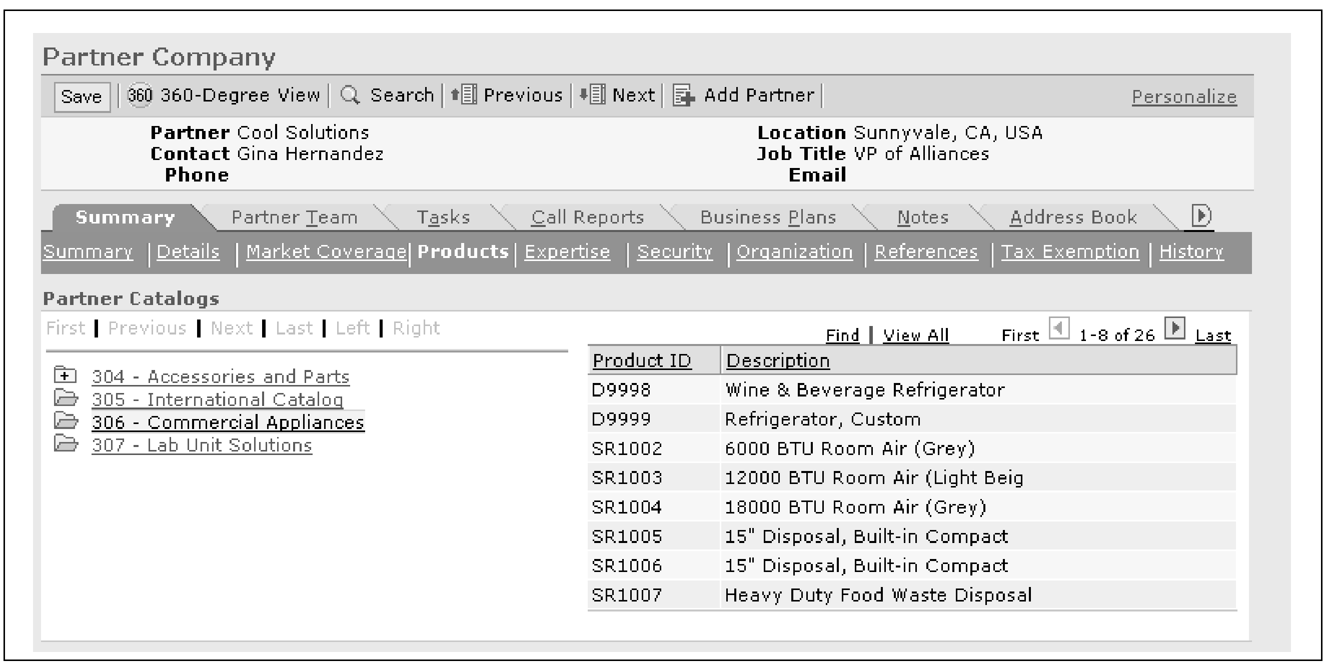
Access the Partner Company - Summary: Market page.



Partner Company - Summary: Market page

Viewing Catalogs

Access the Partner Company - Summary: Products page.

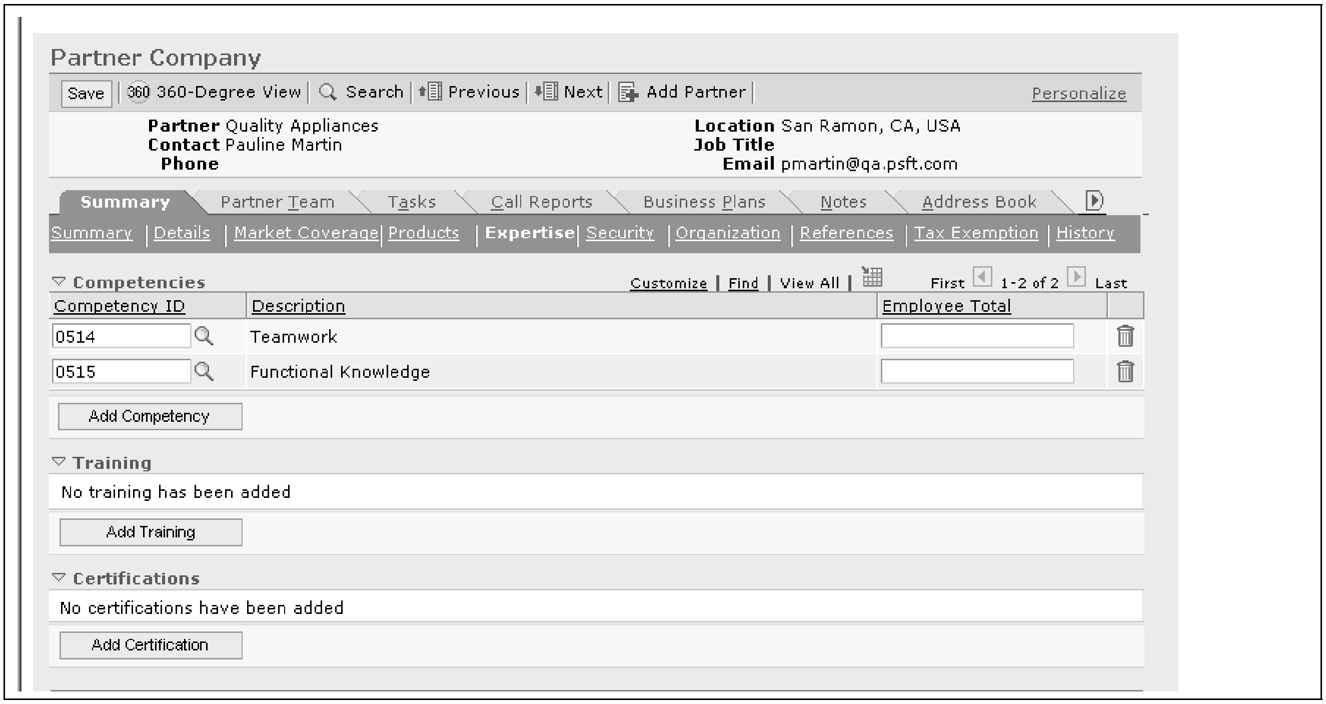


Partner Company - Summary: Products page

Note. PeopleSoft CRM application security determines the list of catalogs. All catalogs that any of the partner's users can view the catalogs are displayed.

Viewing Competency, Training, and Certification Information

Access the Partner Company - Summary: Expertise page.



Partner Company - Summary: Expertise page

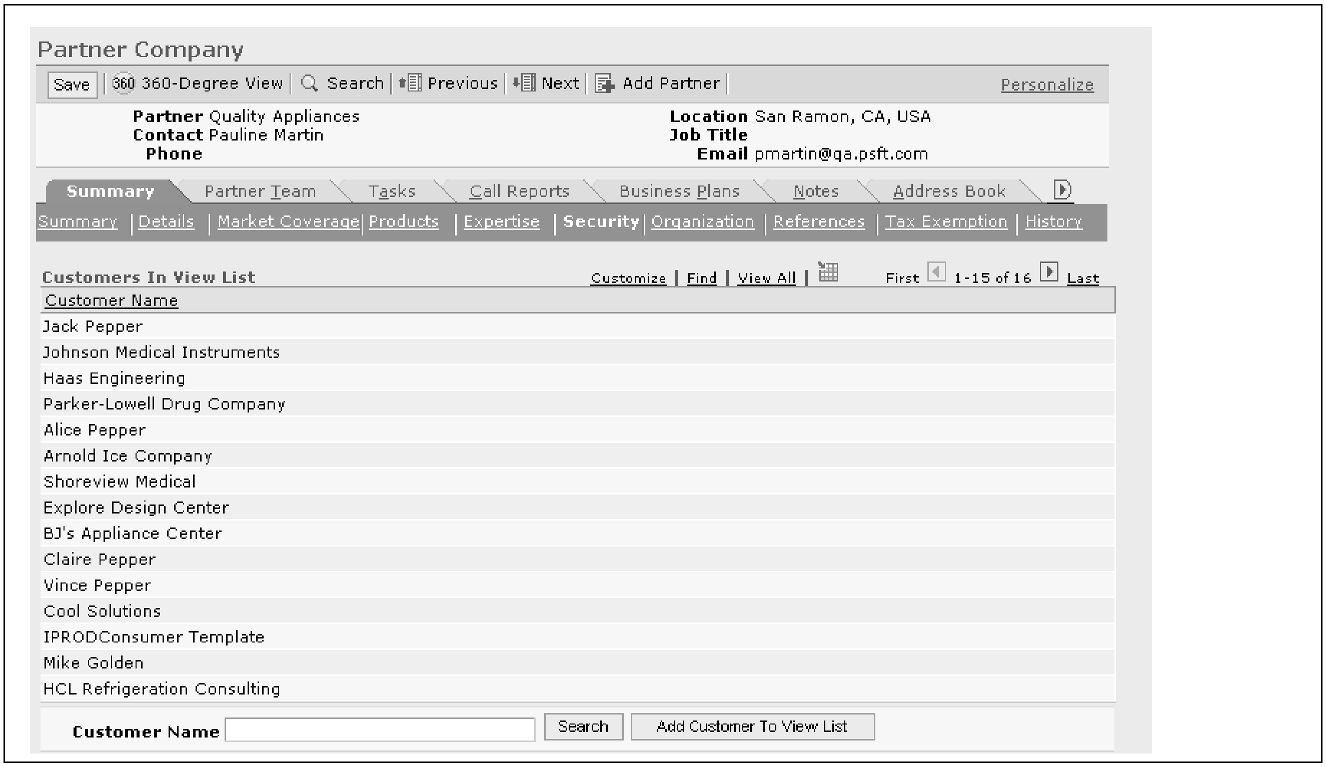
Viewing Partner Access to Customer Data

Access the Partner Company - Summary: Security page.

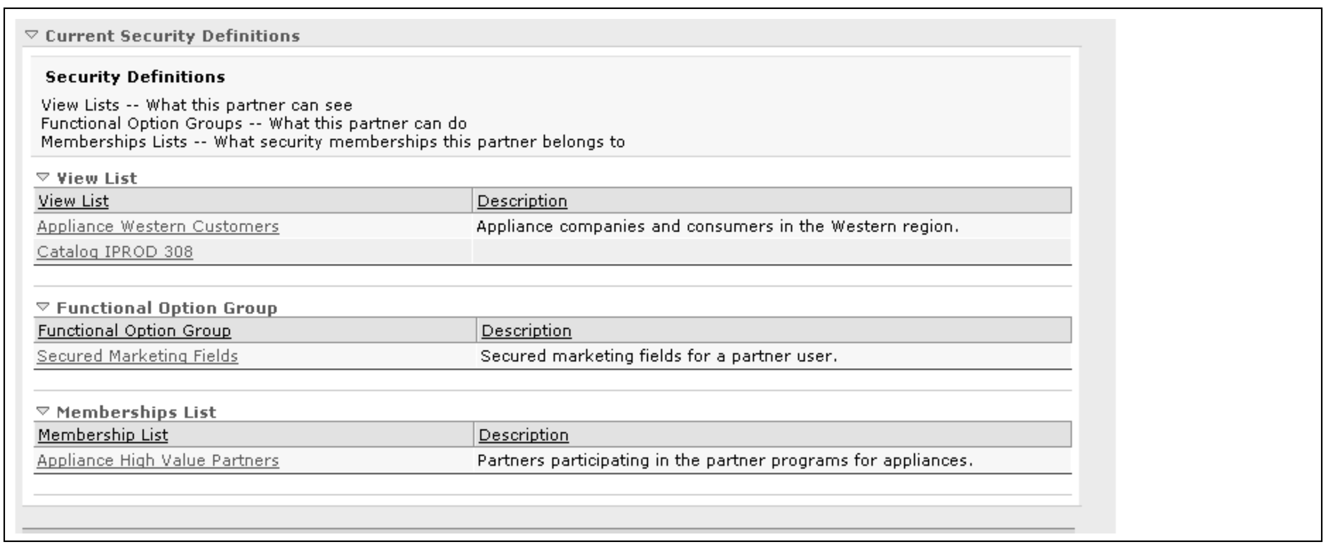
Customers in View List is the net customer list that the Partner has access due to static and dynamic view lists and security profiles.

Search button enables searching for the Customers that the Partner is authorized to view.

Add Customer To View List enables authorizing the Partner to an explicit list of Customers or named accounts.



Partner Company - Summary: Security page (1 of 2)



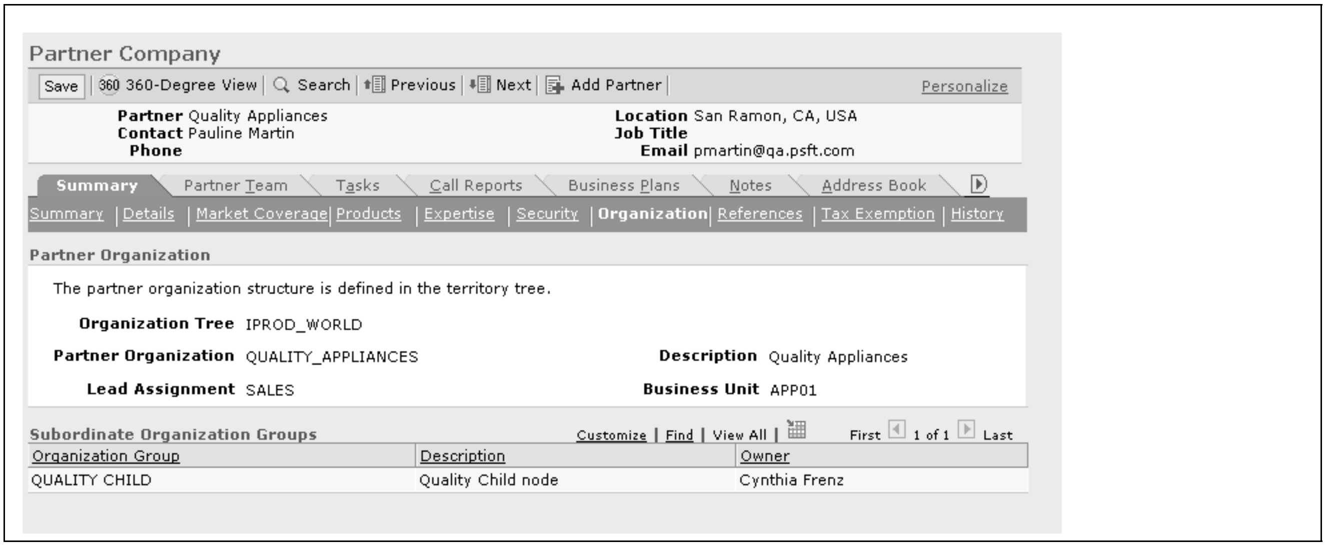
Partner Company - Summary: Security page (2 of 2)

See Also

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

Viewing the Partner Company’s Sales Organization Tree

Access the Partner Company - Summary: Organization page.



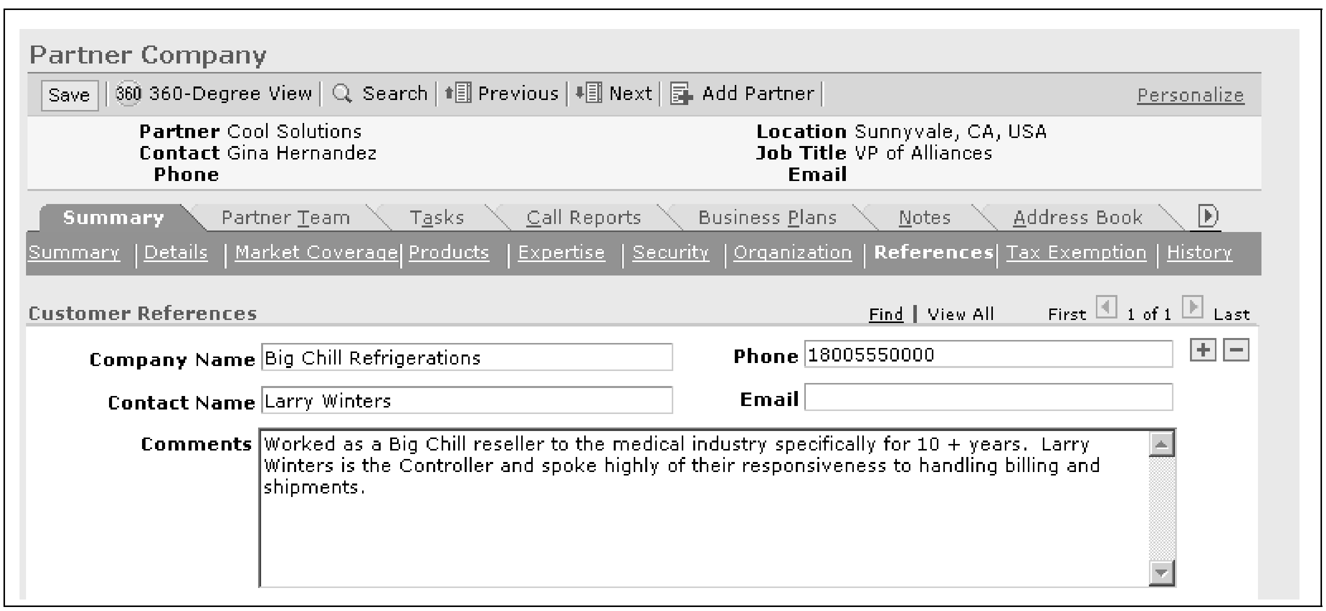
Partner Company - Summary: Organization page

The options for creating a Partner Organization are based on the business unit for the Parent Organization and the setID for the partner.

When the Partner Organization is created, the Business Unit and Lead Assignment group are copied from the Parent Organization. The subordinate organizations displayed are only restricted to the immediate child organizations of the Partner Organization.

Viewing the Partner's Customer References

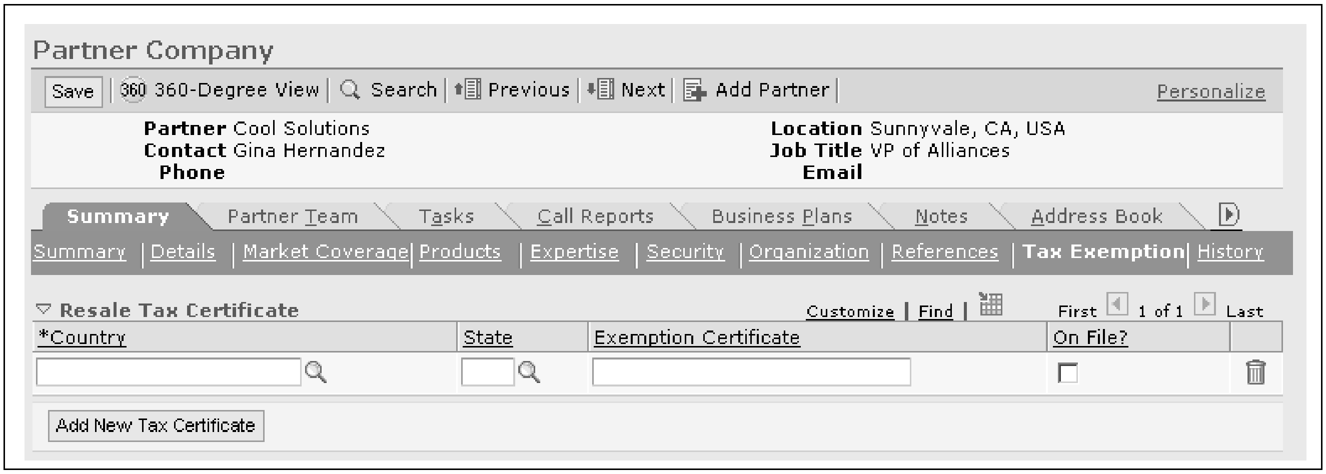
Access the Partner Company - Summary: References page.



Partner Company - Summary: References

Viewing Resale Tax Certificates

Access the Partner Company - Summary: Tax Exemption page.



Partner Company - Summary: Tax Exemption page

Viewing Partner Program History

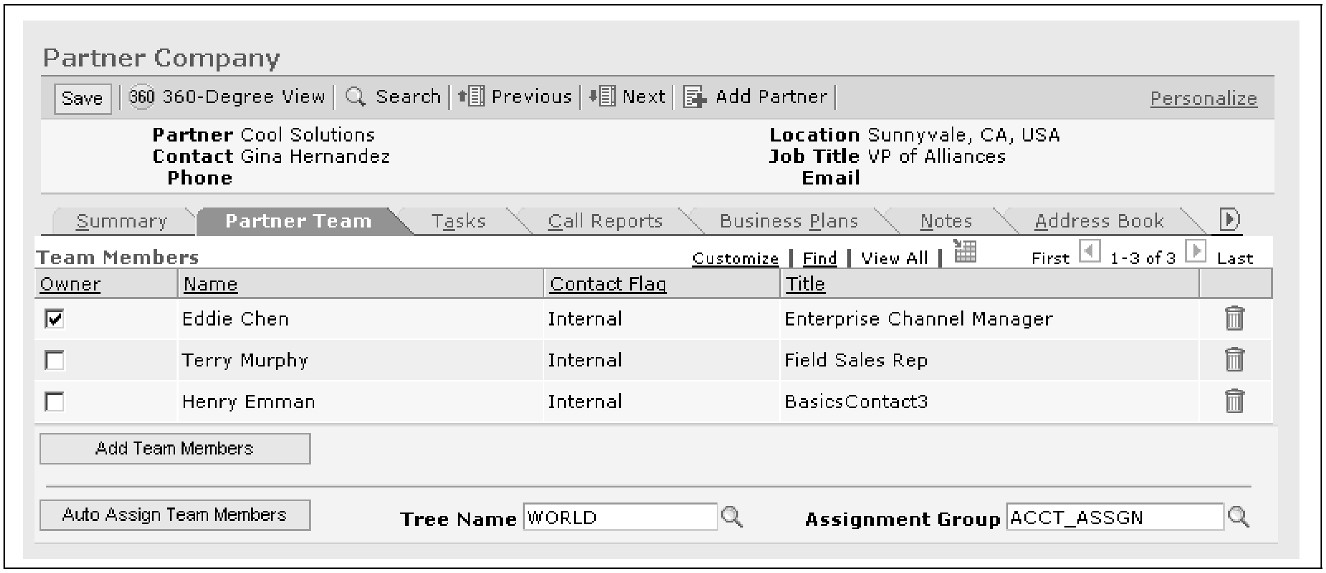
Access the Partner Company - Summary: History page.

Partner Company - Summary: History page

This page displays the partner's history as it relates to the various programs that they have participated in.

Maintaining the Account Team Assigned to the Partner

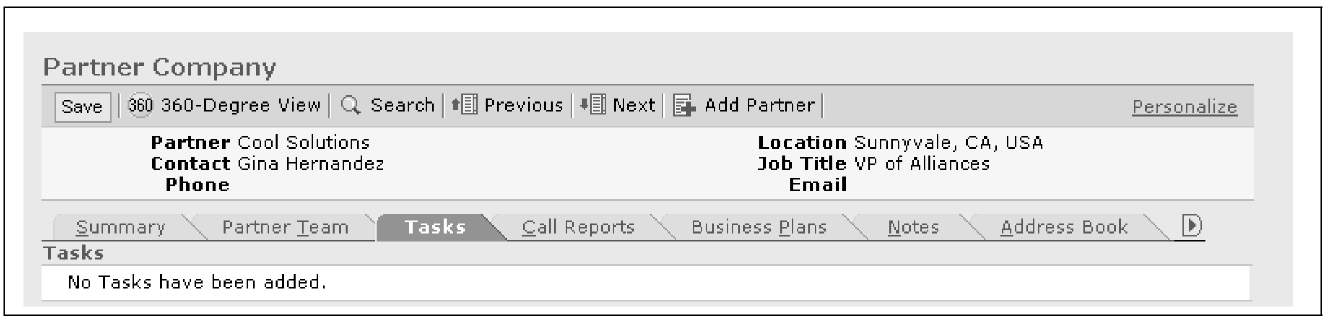
Access the Partner Company - Partner Team page.



Partner Company - Partner Team page

Maintaining Partner-Related Tasks

Access the Partner Company - Tasks page.

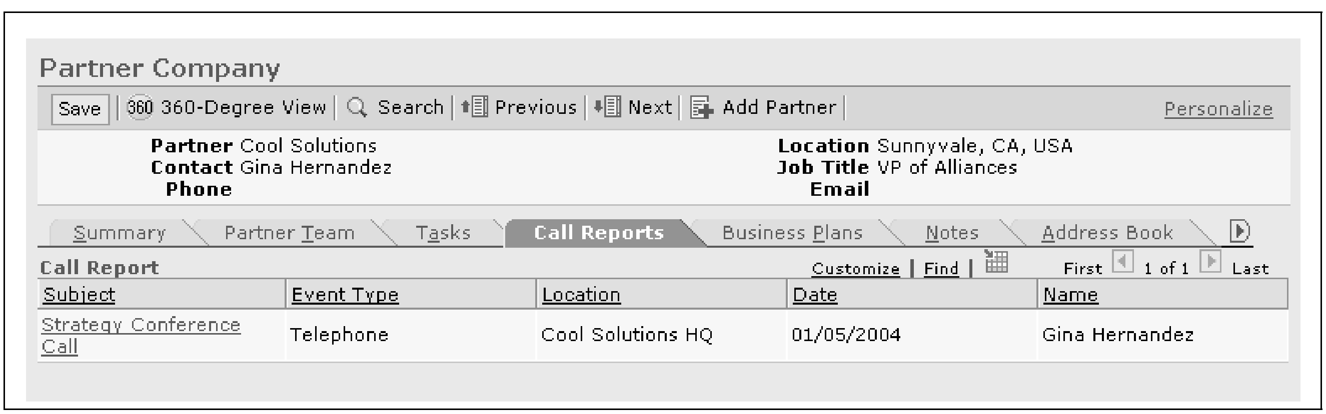


Partner Company - Tasks page

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

Viewing Partner Call Reports

Access the Partner Company - Call Reports page.

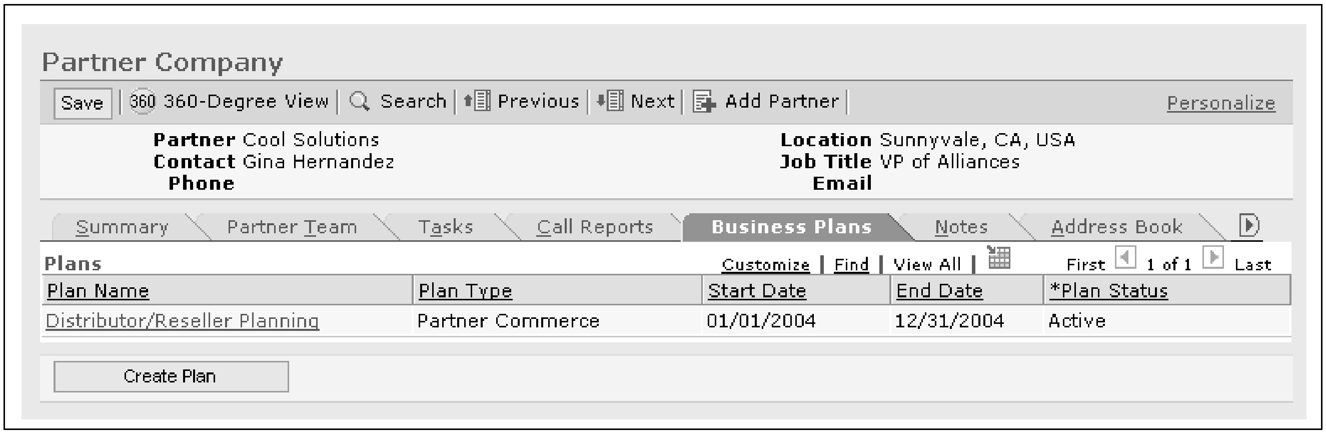


Partner Company - Call Reports page

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

Maintaining Partner Business Plans

Access the Partner Company - Business Plans page.

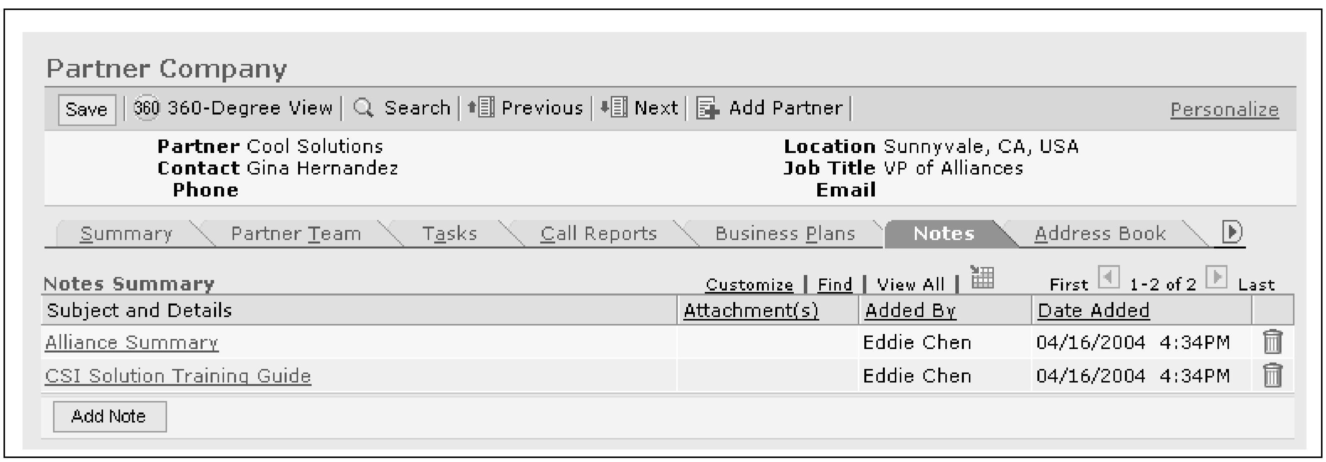


Partner Company - Business Plans page

See *PeopleSoft Enterprise Strategic Account Planning 8.9 PeopleBook*, “Creating Account Plans”.

Entering and Updating Partner Company Notes

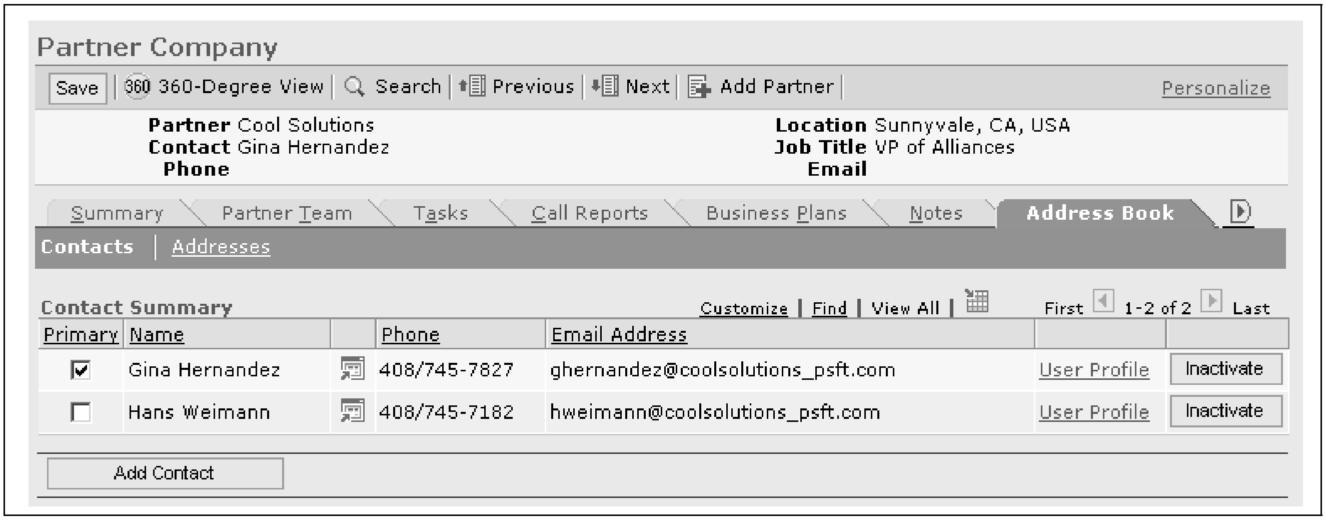
Access the Partner Company - Notes page.



Partner Company - Notes page

Maintaining Partner Company Contacts

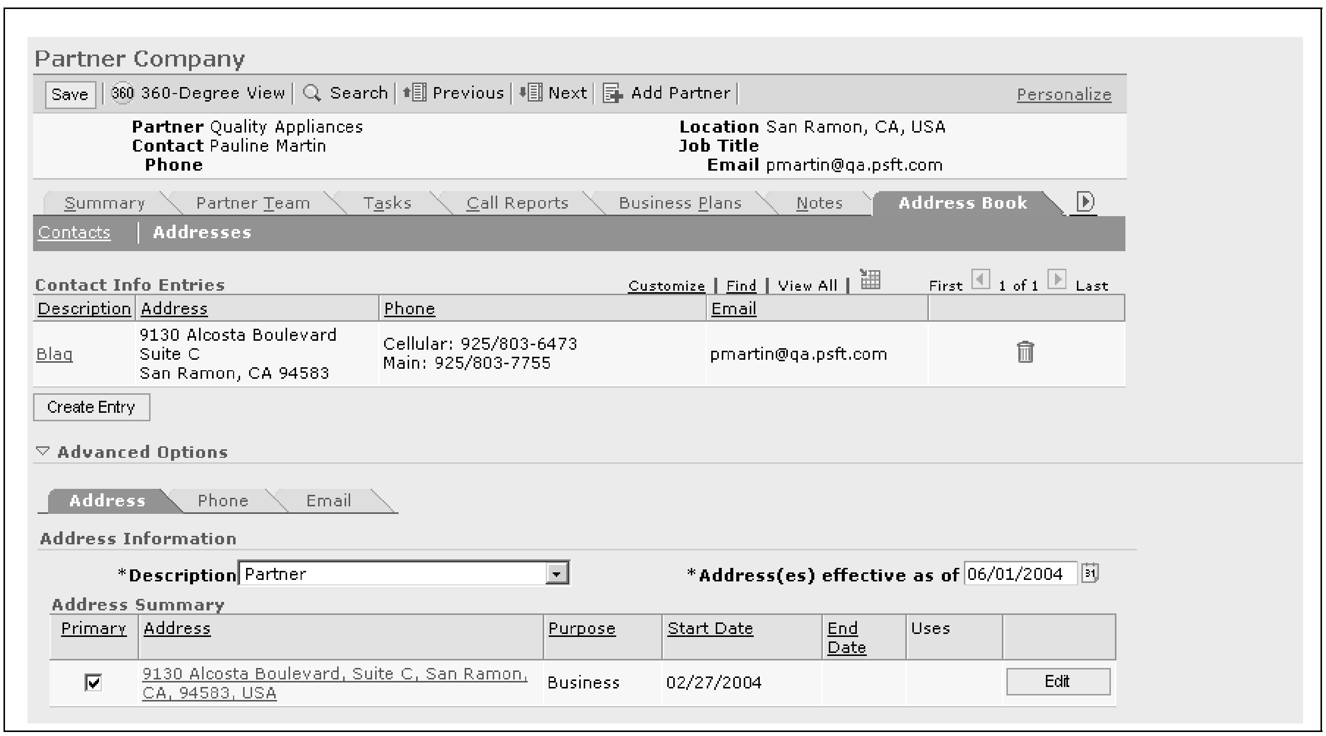
Access the Partner Company - Address Book page.



Partner Company - Address Book page

Maintaining Partner Company Address, Phone, and Email Information

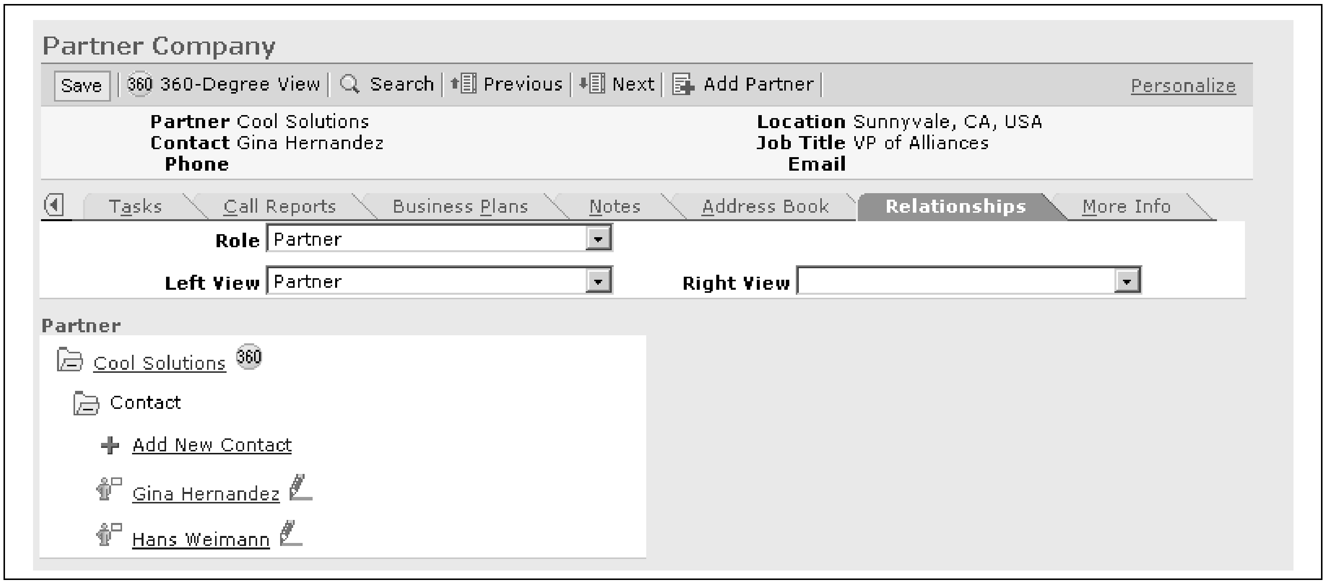
Access the Partner Company - Address Book page.



Partner Company - Address Book: Address page

Viewing and Maintaining Partner Relationships

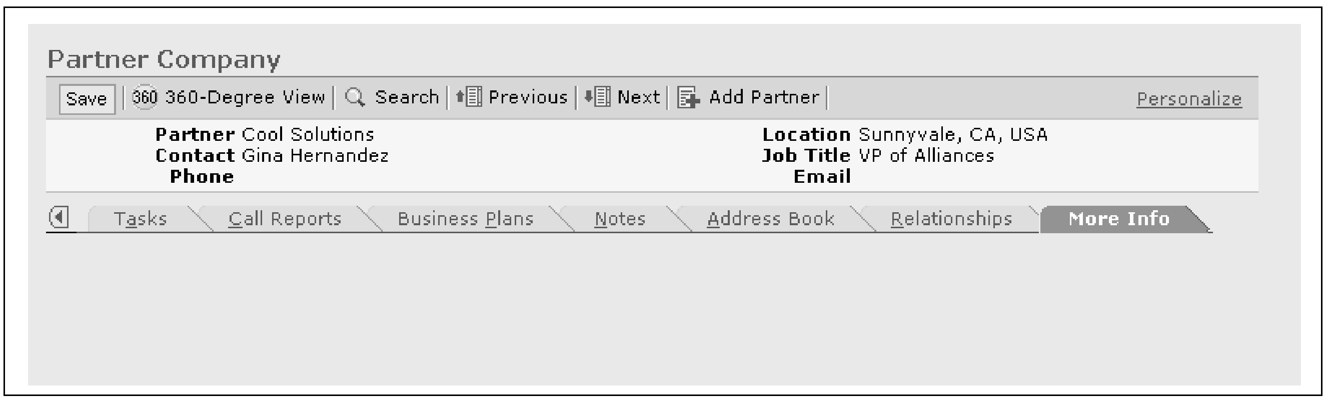
Access the Partner Company - Relationships page.



Partner Company - Relationships page

Maintaining Marketing Profile Information

Access the Partner Company - More Info page.



Partner Company - More Info page

Creating and Managing Partner Users

This section provides an overview and explains how to manage:

- Partner user information.
- Organization groups for partners.
- Additional roles for partners.

Understanding Managing Partners

The User Information and Organization Group pages are used to manage the organization structure and lead assignment for the partner. The sales tree controls the organization group that the partner can be assigned to.

Additional trees can be added by performing the following:

1. Adding additional sales territory trees from the Tree Manager page.

   Note. The appropriate security must be set up in order to add trees.

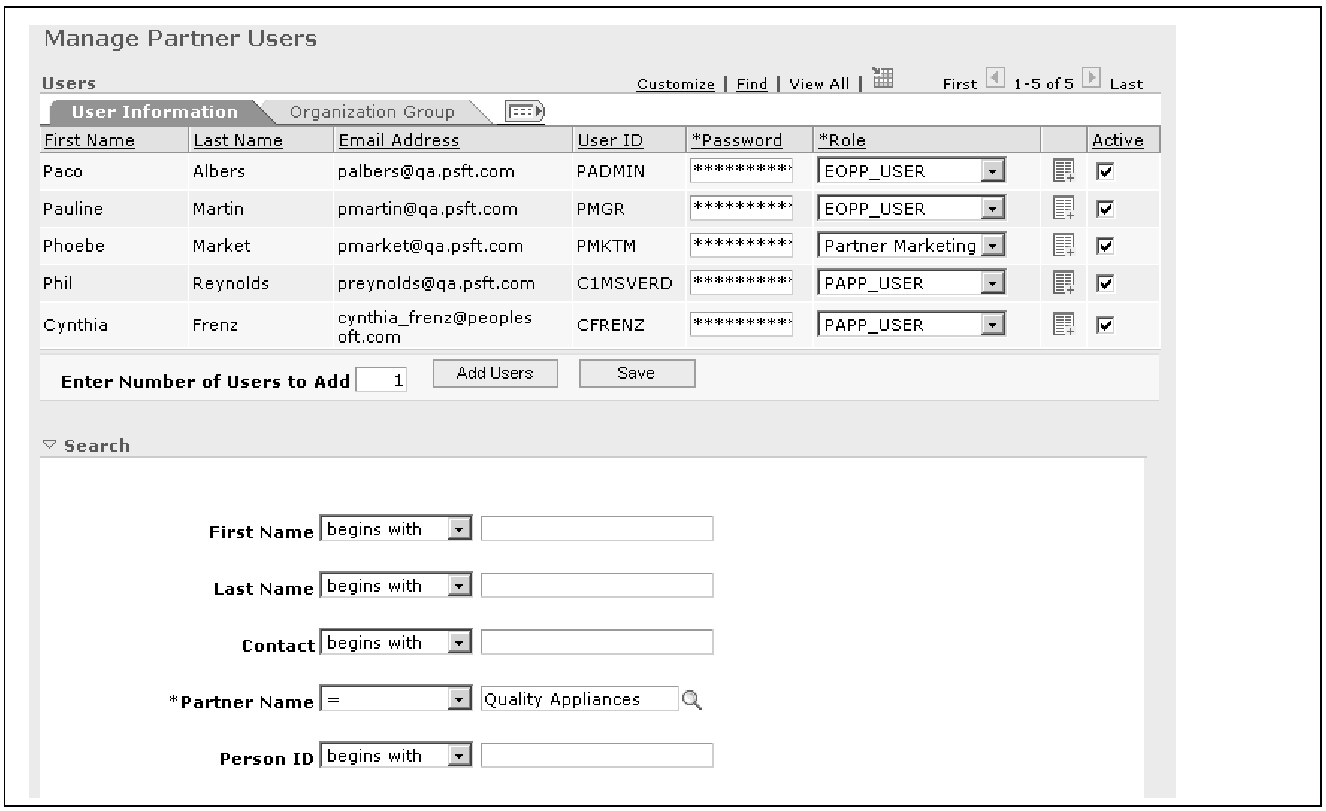
2. Add the new tree for the user on the Organization Groups page.

Pages Used to Manage Partners

Page Name	Object Name	Navigation	Usage
Manage Partner Users — User Information	RD_PTNR_USER_SRCH	Partners CRM, Manage Partner Users	Use to add partners.
Manage Partner Users — Organization Group	RD_PTNR_USER_SRCH	Partners CRM, Manage Partner Users	Use to organization groups for the partner.
Additional Roles	RD_PTNR_USER_ROLES	Click the Additional Roles button on the Manage Partner Users — Users page.	Use to add more then one role for the partner.

Managing Partner User Information

Access the User Information page.



User Information page

Role This is used to determine what the partner can do.

Additional Roles Additional roles can be added by clicking the button.

Note. Roles can only be deleted from the Additional Roles page. Changing the role will add additional roles, but not delete the previously assigned role.

Add Users Click the button to add additional users for the partner.

Save Click the button to save new users for the partner.

Search

Partner Name This is a required field for the search. Use the other fields to limit the search.

Managing Organization Groups for Partners

Access the Organization Group page.

Organization Group The options available for the user are controlled by the Organization Tree.

Group Owner Select the user that you want to be the primary owner for the group.

Adding Additional Roles for Partners

Access the Additional Roles page.

Role Name All of the roles display for the user. Use the Add and Delete buttons to remove or add roles for the user.

Adding Partner Contacts

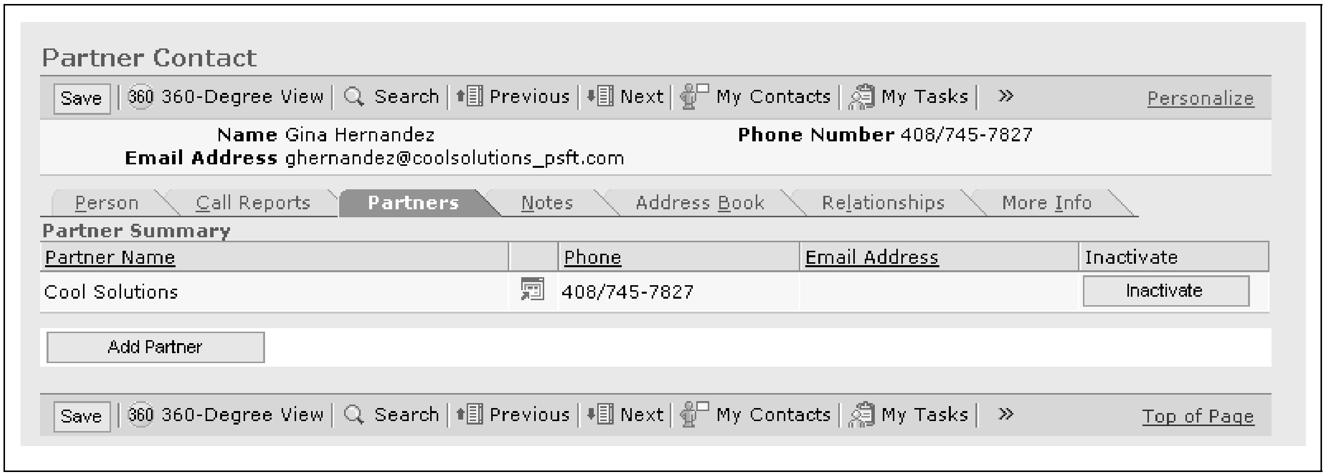
This section explains how to manage partner contacts.

Pages Used to Add Contacts

Page Name	Object Name	Navigation	Usage
Partner Contact - Partners	RD_PRSN_PARTNERS	Partners CRM, Add Partner Contact, Partner Contact, Partners	Add a partner contact

Adding a Partner Contact

Add a partner contact is similar to adding any other contact in the PeopleSoft CRM system. To add a partner contact, access the Partner Contact component - Partners page.



Partner Contact - Partners page

This page is the only unique page when you want to add a partner contact. Be sure to fill out all of these other pages. The information is stored in the PeopleSoft Customer Data Model.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Company Business Objects,” Defining Company Contacts

CHAPTER 6

Setting Up Security for Partners

This chapter identifies new security terminology relevant to PeopleSoft Partner Relationship Management (PRM), provides an overview of PRM security, and explains how to:

- Understand transaction security as applied to PRM.
- Understand and set up PeopleSoft CRM application security for PRM.

PRM Security Terminology

Transaction	A primary business activity such as campaigns, cases, leads, opportunities, orders, and service orders.
Configurable Search	A transaction search page with a common interface that is shared across all CRM transactions. A system administrator can configure the relevant search fields for each transaction. Configurable Searches can use dataset definitions for achieving row-level security in the search results.
Functional Options	A unique code that defines a specific action or privilege that can be performed within a transaction or component. For example, a single functional option could control whether a partner can add a customer address.
Functional Option Group	A grouping of function options. A partner can maintain orders, can add customers, and view customer addresses.
Membership List	A dynamically or statically defined group of people—for example partner contacts —whose functional and data access needs to be secured.
View List	A dynamically or statically defined group of objects—for example, customers, accounts—that are being secured for viewing by the Membership List. For example, all Fortune 500 companies in the North America
Security Profile	A logical security container that groups the view lists and functional privileges that can be granted to a membership list. A security profile is given to one or multiple membership lists. An example would be all partners in the gold program (membership list) have access to Fortune 500 companies (view list) with the ability to *maintain orders* and *add customer addresses* (functional options).

Overview of Security as Applied to Partner Relationship Management

One of the foundational components of the PeopleSoft Partner Relationship Management (PRM) Solution is security. Security is a combination of transaction (or PeopleTools) security, application security, and distributed security (for partner users). Transaction security includes the menu navigation and component access achieved through a combination of the existing PeopleSoft portal navigation security, PeopleTools component security, and dataset security frameworks. PeopleTools security provides a mechanism to control PIA menu navigation access through Portal Security, Permission Lists and user roles. Application security includes securing data, prompts, and functions within a transaction. Dataset security controls row-level access to transactions, and is achieved by associating the definition of a dataset to the Configurable Search definition for a transaction that has multiple dataset rules. Dataset rules will be assigned to PeopleTools Roles.

PeopleSoft Partner Relationship Management provides for the most stringent requirements for securing partner access to transactions and customer data. You need to define role-based and characteristics-based security. This includes the transactions that can be accessed, the transaction rows that should be accessible, the customers that can be seen by the partner, and what the partner can do within the general transaction or transaction row. PeopleSoft PRM also requires that user management and security administration of partner users be delegated to partner organizations to manage with minimal intervention from the enterprise organization. Administering partner security is seamless, and easy to implement. An enterprise administrator can set up the partner system and delegate administration responsibility to partner administrators. The partner administrator should then be able to create subsequent partner users and manage security for those users in a distributed manner.

Understanding Transaction (PeopleTools) Security in PRM

In this section, we provide an overview of transaction security in PRM, and identify:

- Partner roles and permissions.
- Sample user IDs for PRM.
- PRM dataset security in PeopleSoft Partner Commerce, Partner Sales, and Marketing.

Overview of Transaction Security

Transaction Security (PeopleTools Security) includes PeopleTools Security, Portal Registry, and Dataset Security. This can be implemented with existing PeopleTools functionality.

- *PeopleTools Security:* Set up permission lists, roles, and sample users.
- *Portal Registry:* Define folders and content references; set up security for the folders and content references.
- *Dataset Security:* Define data distribution rules, assign data distribution rules to PeopleTools roles, and attach the dataset to a Configurable Search definition.

Partner Roles and Permissions

Below is a guideline for defining the roles and permissions to achieve PRM role-based navigation access to PeopleSoft transactions. These roles will be delivered out of the box. You can add or modify, new or existing roles and permissions to fit their business requirements

Role	Permissions
Enterprise Channel Manager	Responsible for managing the day-to-day transactional sales relationship between the Enterprise and the Channel Partner: • Review new leads and determine distribution if manual. • Review status of leads already distributed. • Review pipeline. • Approve quotes generated by partner. • Manage one or more partners. • Manage partner registration and partner profiles. • Manage territory trees. • Manage application security.
Partner Administrator	Responsible for performing any administrative tasks that the enterprise has enabled for the partner: • Search and select customers. • Create new partner employees and establish security parameters. • Create organization groups (territories). • Clear and approve orders that are in “Hold” status. • View product catalog.
Partner Sales Manager	Responsible for a team of sales representatives: • Search and select customers. • Create and approve quotes and orders. • Search quotes and orders. • Access product catalog.
Partner Marketing Analyst	Responsible for marketing programs: • Add partner related tasks. • Adds partner related costs . • Views overall campaign status and progress.
Partner Marketing Manager	Responsible for marketing programs and views overall campaign status and progress.

Sample User IDs for PRM

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

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

PRM Dataset Security

We deliver dataset security that will be used for the PRM solution. Please reference the table below for the dataset security that is enabled out of the box and which PRM product enables that security.

Partner Commerce Dataset Rules

Dataset Rule	Partner Administration	Partner Sales Manager	Partner Representative	Partner Marketing Analyst	Partner Marketing Manager
Orders as Partner Contact	No	Yes	Yes	No	No
Orders as Partner Manager	No	Yes	No	No	No

Partner Sales Dataset Rules

Dataset Rule	Partner Administration	Partner Sales Manager	Partner Representative	Partner Marketing Analyst	Partner Marketing Manager
Leads as Partner Owner	Yes	Yes	Yes	No	No
Leads as Partner Manager	Yes	Yes	No	No	No
Leads as Partner Team Member	No	Yes	Yes	No	No
All Organization Groups	No	No	No	No	No

Dataset Rule	Partner Administration	Partner Sales Manager	Partner Representative	Partner Marketing Analyst	Partner Marketing Manager
Organization Groups as Owner	Yes	No	No	No	No
Organization Groups as Manager	Yes	No	No	No	No

Partner Marketing Dataset Rules

Dataset Rule	Partner Administration	Partner Sales Manager	Partner Representative	Partner Marketing Analyst	Partner Marketing Manager
All Audiences as Owner	No	No	No	Yes	Yes
All Audiences as Team Member	No	No	No	Yes	Yes
Published Audiences	No	No	No	Yes	Yes
Programs as Team Member	No	No	No	Yes	Yes

Partner for Financial Accounts Dataset Rules

Dataset Rule	Partner Administration	Partner Sales Manager	Partner Representative	Partner Marketing Analyst	Partner Marketing Manager
Accounts as Partner	Yes	No	Yes	No	No
Accounts as Owner	Yes	No	Yes	No	No

Setting Up PeopleSoft CRM Application Security for PRM

This section provides an overview of CRM application security as applied to PRM, and explains how to:

- Define partner security objects.
- Add partner membership and view lists.
- Define functional options and functional option groups.
- Add partner security profiles.

- Set up other security options.

Understanding PeopleSoft CRM Application Security for PRM

The application security framework (CRM Application Security) is a characteristic-based security framework that will allow PeopleSoft Customers to secure data and functions within a transaction. A group of partners — for example, European partners — are given access to a group of customers and this group of partners can add customers, generate quotes, submit orders, etc. Application Security involves setting up and defining membership lists, view lists, and functional options. Together these three constructs constitute what we call a PRM Security Profile.

- Membership List

  Define the characteristics of one or a group of users — for example, partner users — to whom system and data access and functional options are being granted. Users in a security membership list definition are recipients of a security profile. Membership lists can be either dynamic or static. A dynamic membership list is a set of characteristics that result in a constantly updated list of members for a membership list object. Even if the domain type is dynamic, you can still edit the membership criteria using the appropriate configurable search definition. A static membership list contains a specific list of members that you may associate with any security profile available in the system. So if you wish to specify the partners who will be part of a membership list you would use a static list, but if you want the list to continually update its list of partners, old and new, depending on defined criteria, you would use a dynamic selection.

- View List

  Define characteristics of the viewing object — for example, partner customers, accounts — that are being secured from the Membership List.

- Functional Options

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

The following example illustrates how security can be set up for partners:

1. Create a dynamic membership list that contains All Platinum Reseller type Partners in USA and in the State of California.

   Run the list builder process to insert the list results into a list table.

2. Create a dynamic list of All Consumers in the state of California.

   Run the list builder process to insert the list results into a list table.

3. Create a Security profile that has the membership list from step 1 and view list from step 2.

4. Log in and enter an order as:

   - A partner using the Platinum Reseller group.
   - An agent, entering an order on behalf of a partner using the Platinum Reseller group.

   Note. In both cases, the view list (all consumers in state of California) will be restricted based on the fact that the order contains the partner who is a member of the Platinum Reseller membership list.

See Also

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

Pages Used to Set Up PRM Application Security

Page Name	Object Name	Navigation	Usage
Security Object	RSEC_OBJECT_DEFN	Set Up CRM, Security, CRM Application Security, Security Object, Security Object	View or edit the Partner security object.
Add Membership List	RSEC_MEMBER_SMRY	Set Up CRM, Security, CRM Application Security, Add Membership List, Add Membership List	Add a partner membership list. You can activate or deactivate the membership list. The membership list you create here will be associated to a security profile.
Add Membership List	RSEC_SRTY_WIZ1	Click the Nextbutton on the first Add Membership List page.	Select the partner membership object and the partner members to which you want the security object to apply.
Add Membership List	RSEC_SRTY_WIZ2	Click the Nextbutton on the second Add Membership List page.	Select a partner Membership Type of either *dynamic* or *static*.
Add Membership List (Dynamic)	RSEC_PARTNER_SRCH	Select the *Dynamic* radio button and click the Nextbutton on the third Add Membership List page.	Choose the dynamic criteria that you want to use to select partners.
Add Membership List (Static)	RSEC_ML_PARTNER	Select the *Static* radio button and click the Next button on the third Add Membership List page.	Select the specific partners you want to add to the membership list.
Add View List	RSEC_VIEW_SMRY	Set Up CRM, Security, CRM Application Security, Add View List, Add View List	Enter the view list name and description. You can activate or deactivate the view list here.
Add View List	RSEC_SRTY_WIZ1	Click the Next button on the first Add View List page.	Select the Security Object type and the members to which you want the security object to apply.
Add View List	RSEC_SRTY_WIZ2	Click theNext button on the second Add View List page.	Select either a *Dynamic* or *Static* view type.
Add View List (Dynamic)	RSEC_CUSTOMER_SRCH	Select the *Dynamic* radio button and click the Next at the bottom of the third Add View List page.	Choose the dynamic criteria that you want to use to select customers, or view list objects.

Page Name	Object Name	Navigation	Usage
Add View List (Static)	RSEC_VL_CUSTOMER	Select the *Static* radio button and click the Next at the bottom of the third Add View List page.	Choose the specific customers (or other view list objects) that you want to use.
Functional Option	RSEC_FUNC_DEFN	Set Up CRM, Security, CRM Application Security, Functional Option, Functional Option	Define functional options, including enabling amount-related fields, conditional operators, application classes, and messages.
Functional Option Group	RSEC_FUNC_GROUP	Set Up CRM, Security, CRM Application Security, Functional Option Group, Functional Option Group	Group functional options.
Security Profile	RSEC_PROFILE	Set Up CRM, Security, CRM Application Security, Add Security Profile, Security Profile	Define a partner security profile.
Security Profile - Membership	RSEC_PROFILEMEMBER	Set Up CRM, Security, CRM Application Security, Add Security Profile, Membership	Add partner membership lists to the partner security profile
Refresh Dynamic Lists	RSEC_BUILDER_RUN	• Set Up CRM, Security, CRM Application Security, Refresh Dynamic Lists, Refresh Dynamic Lists • Click Run from the Security Profile page.	Set run controls for the List Build process.
Static Menu Transfer	RSEC_STAT_MENU	Set Up CRM, Security, CRM Application Security, Static Menu Transfer Path, Static Menu Transfer	Enter static menu transfer paths.

Defining Partner Security Objects

To set up a partner as a security object, access the Security Object page.

PeopleSoft PRM is delivered with several security objects. For example, Partner is a member security object and Customer is a view security object.

See Also

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

Adding Partner Membership and View Lists

To add a partner membership list, access the Add Membership List page.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Adding Membership List Names and Descriptions

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Adding View List Names and Descriptions

Defining Functional Options and Functional Option Groups

To define functional options and functional option groups, access the Functional Option and Functional Option Group pages.

The functional options that can be used with PRM are:

Functional Option Code	Description	Application/Function
CORE_RSF_FCAST_ROLLUP	Forecast will begin in rollup; otherwise it begins in summary.	Sales
CORE_RSF_FCAST_SIMPLE	Forecast simple reduces options presented to the forecast user.	Sales
CORE_RSF_ADVANCED	Controls basic versus advanced mode for lead and opportunity components.	Sales
CORE_RSF_AUTO_ASSIGN_OFF	Controls the ability to automatically assign a lead or opportunity at save in add mode.	Sales
CORE_RSF_DEFAULT_OWNER	When lead or opportunity is in add mode at save time, the current user is assigned as the primary sales representative by default. If revoked, then leave lead or opportunity unassigned.	Sales
CORE_RSF_SEARCH_PRODUCT_GROUP	Allows the end user to search for product group on leads and opportunities.	Sales
CORE_RSF_SHOW_SITE	Controls the ability to add a site to a lead or opportunity.	Sales
CORE_RSF_SUMMARY	Control the display of the summary page in lead and opportunity.	Sales
RO_MAX_DISCOUNT_PERCENT	Maximum discount percent.	Order Capture
RO_MAX_ORDER_TOTAL	Maximum order total reached.	Order Capture
RO_MAX_SURCHARGE_PERCENT	Maximum surcharge percent.	Order Capture
RO_MIN_MARGIN_PERCENT	Maximum profit margin percent.	Order Capture

Functional Option Code	Description	Application/Function
SEARCH_ALL_PRODUCTS	When searching for products in Order Capture, this functional option give the user the ability to search for any products that are defined in the system instead of limiting them to the products that are defined in a catalog.	Order Capture
MKTHIDE	Hides marketing fields.	Marketing
MKTDISP	Makes marketing fields display-only.	Marketing

See Also

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

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

Adding Partner Security Profiles

To define partner security profiles, access the Security Profile page and the Security Profile - Membership page.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Adding Functional Option Groups and View Lists to the Security Profile

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Adding Membership Lists to the Security Profile

Setting Up Other Security Options

You can set up run controls for the List Build process. This allows you to refresh the dynamic membership lists and view lists, all security objects, and profiles that you have created to implement security for PeopleSoft Partner Relationship Management. If the content of the lists, objects, and profiles changes frequently, you can set up this process to run daily, every few minutes, or every few hours.

You can also create static menu transfer paths for entering or viewing static list data that is either dynamically created or entered manually. Irrespective of how a membership or view list is created, the results of the list or the list members are stored in a list table. In order to see the list members, a page and a component are created and attached to a menu. The static menu transfer path shows the location of the transfer component.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Setting Run Controls for the List Build Process

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Entering Static Menu Transfer Paths

CHAPTER 7

Setting Up and Managing Partner Registration

This chapter provides an overview and discusses how to:

- Set up partner registration.
- Register a partner.

Understanding Partner Registration

In order to allow potential partners to apply for partnership online, your enterprise can provide a self-service registration process. The prospective partners can then access a public web site for your enterprise and enter their company information, answer questions, and submit an application.

The partner registration feature allows potential partners to apply for partnership online and receive email notification after submitting the application. The Enterprise administrator can configure the partner registration process, partner profile attributes, and email notifications. The Enterprise Channel Manager can receive email notification of new applications, review registration history, and send email to the prospective Partner Relationship Manager automatically.

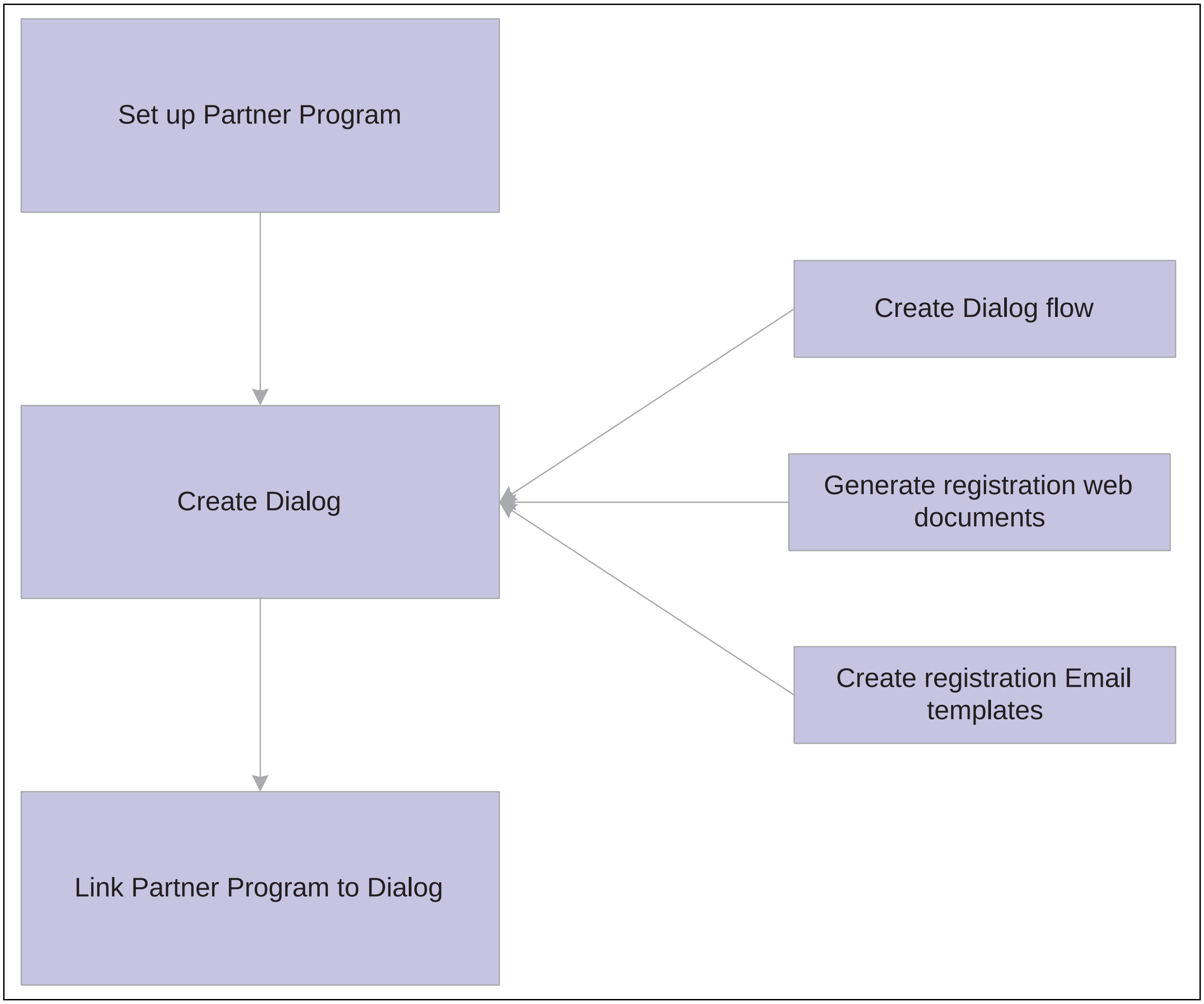
Using partner registration you can:

- Enable partner companies' applications for partnership and registration via an online self-service registration process.
- Maintain a history of partner status, including application and registration outcomes
- Configure the partner registration process to define your own partner registration process flow, profile attributes to track, registration documents, and Email templates.

PRM self-service registration is totally configurable, so you will use the PeopleSoft Online Marketing dialog feature to define your own partner registration process, including setting up registration confirmation/notification email documents. Dialog will also be used for designing and rendering registration web pages at run time. The Partner Platform product comes with a limited license to the dialog feature of PeopleSoft Online Marketing; an additional license of Peoplesoft Online Marketing is not required.

Partner Registration Setup Flow

The following diagram illustrates the registration setup flow.

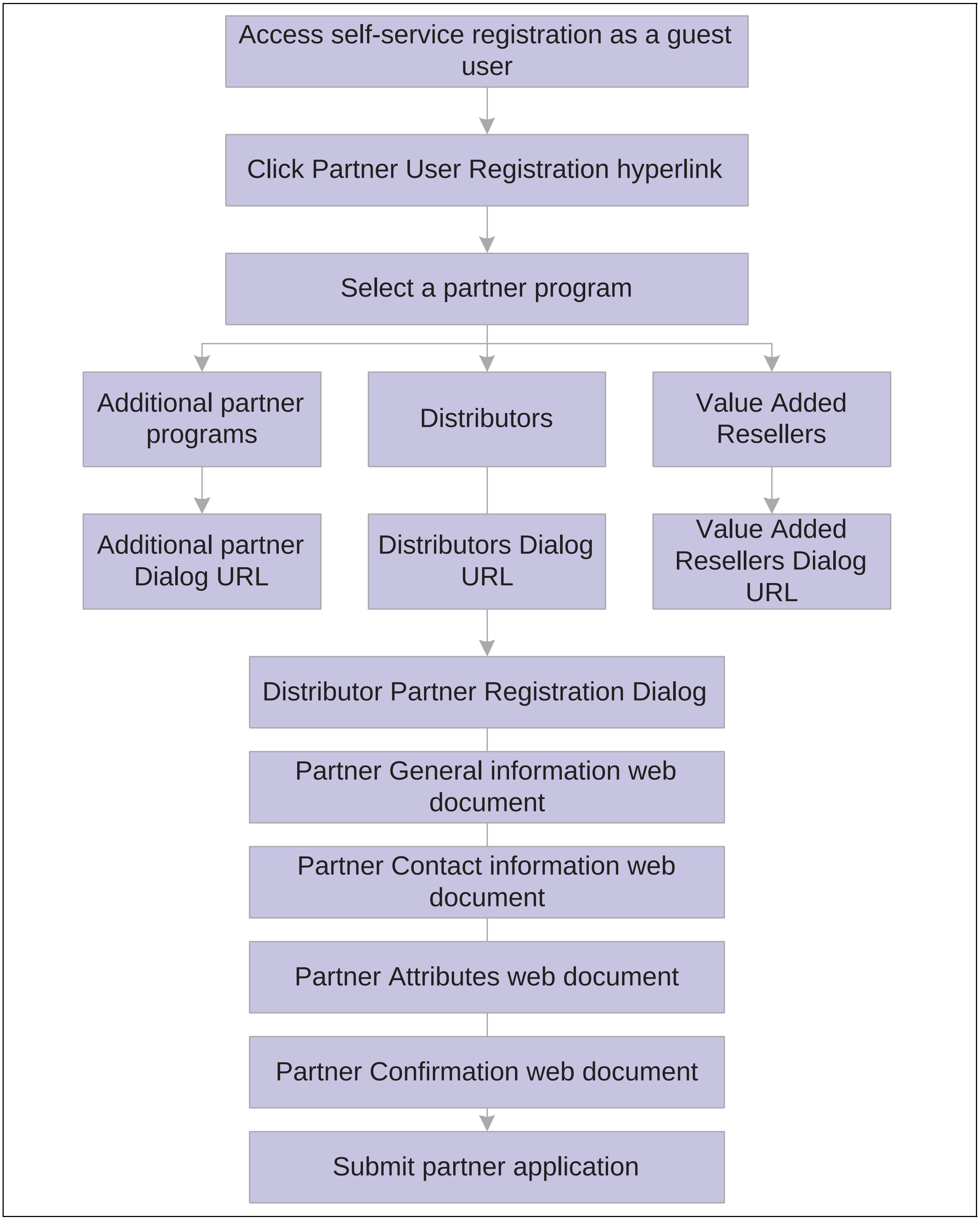


Partner registration setup flow

The setup includes setting up partner programs , defining customized profile attributes in Marketing Profile (optional), creating a dialog using the PeopleSoft Online Marketing dialog functionality, associating the dialog to the partner program, and creating a dialog flow, registration Web Documents and Email notification templates. You will need to follow through this flow and complete each task to create your self-service registration process.

Partner Registration Process Flow

The following diagram illustrates a typical partner registration process flow used during online registration. PeopleSoft delivers this sample dialog out of the box that you may wish to use and modify to suit your business requirements.



Partner registration process flow

Setting Up Partner Registration

This section discusses how to:

- Set up partner programs.
- Create dialogs.
- Link partner programs to dialogs.

Pages Used to Set Up Partner Registration

Page Name	Object Name	Navigation	Usage
Partner Program	RD_PR_PROG	Partners CRM, Add Partner Program, Partner Program	Set up a partner program.
Dialog Designer	RY_DIALOG	Marketing, Dialog Designer, Dialog Designer	Create a dialog flow.
Document	RY_EDOC	Marketing, Document Designer, Document	Generate registration web documents.
Document	RY_EDOC	Marketing, Document Designer, Document	Create registration confirmation and notification email templates.

Setting Up Partner Programs

Access the Partner Program page.

See Chapter 4, "Creating Partner Programs," Setting Up the Partner Program Environment, page 11.

Creating Dialogs

This section discusses how to:

- Create dialog flow.
- Generate registration web documents.
- Create registration confirmation and notification email templates.

See Chapter 4, "Creating Partner Programs," Creating Dialogs for Partner Programs, page 19.

Creating Dialog Flow

Access the Dialog Designer page.

See *PeopleSoft Enterprise Online Marketing 8.9 PeopleBook*, "Designing Online Dialogs," Creating a New Dialog.

Generating Registration Web Documents

Access the Dialog Designer page.

See *PeopleSoft Enterprise Online Marketing 8.9 PeopleBook*, “Designing Web Documents”.

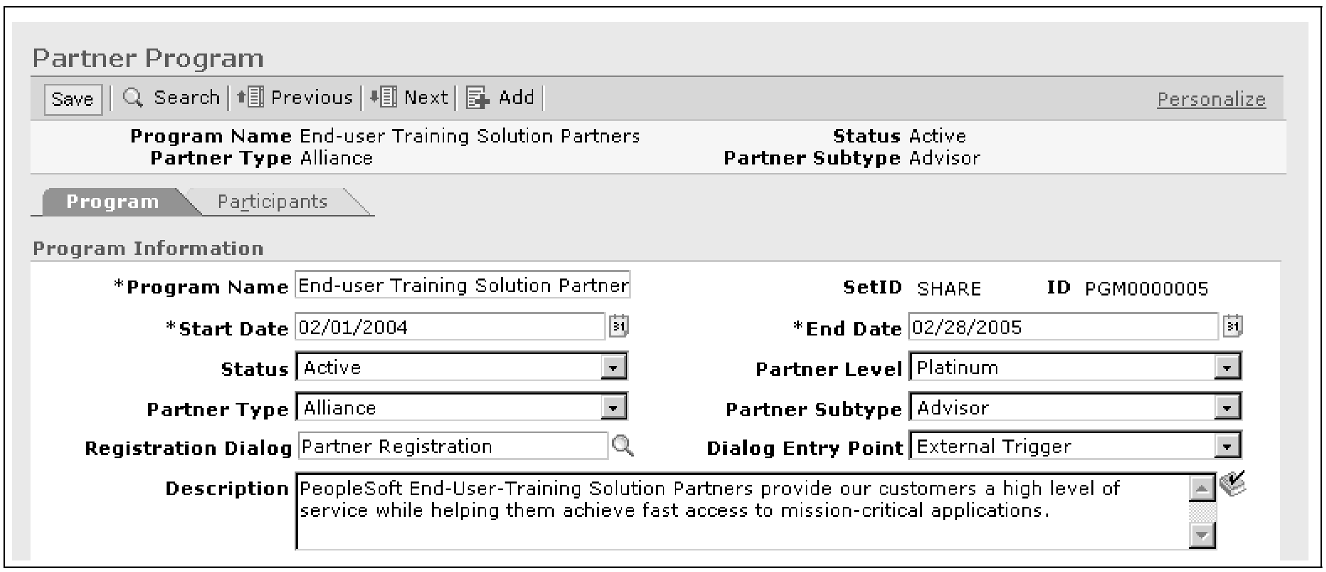
Creating Registration Confirmation and Notification Email Templates

Access the Dialog Designer page.

See *PeopleSoft Enterprise Online Marketing 8.9 PeopleBook*, “Designing Email Documents”.

Linking Partner Programs to Dialogs

Access the Partner Program page.



Partner Program page

Registration Dialog Displays the dialog that has been defined through the dialog creation process in PeopleSoft Marketing.

Dialog Entry Point Displays the document or trigger point of the dialog that will launch the dialog for the end user.

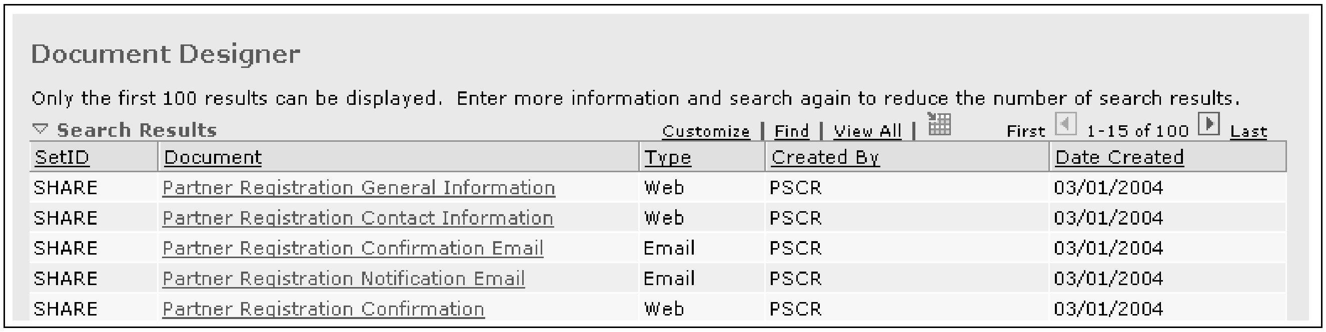
Registering a Partner

For partner registration, PeopleSoft delivers a sample dialog and sample documents. They are named *Partner Registration XXX* and can be found under Marketing, Dialog Designer or Marketing, Document Designer. Because of the data complexities surrounding the publishing of a dialog–Go Live–these are delivered in design mode and must be activated. You can start with the provided sample data, or use this as a guide to create your own registration dialogs. These dialogs are provided as samples only.

It is recommended that you work through the following steps to activate and test the delivered data before setting up your enterprise partner registration.

Validating Sample Documents

Navigate to Marketing, Document Designer. Confirm the following documents exist:



Document Designer

Only the first 100 results can be displayed. Enter more information and search again to reduce the number of search results.

Search Results — Customize | Find | View All | First 1-15 of 100 Last

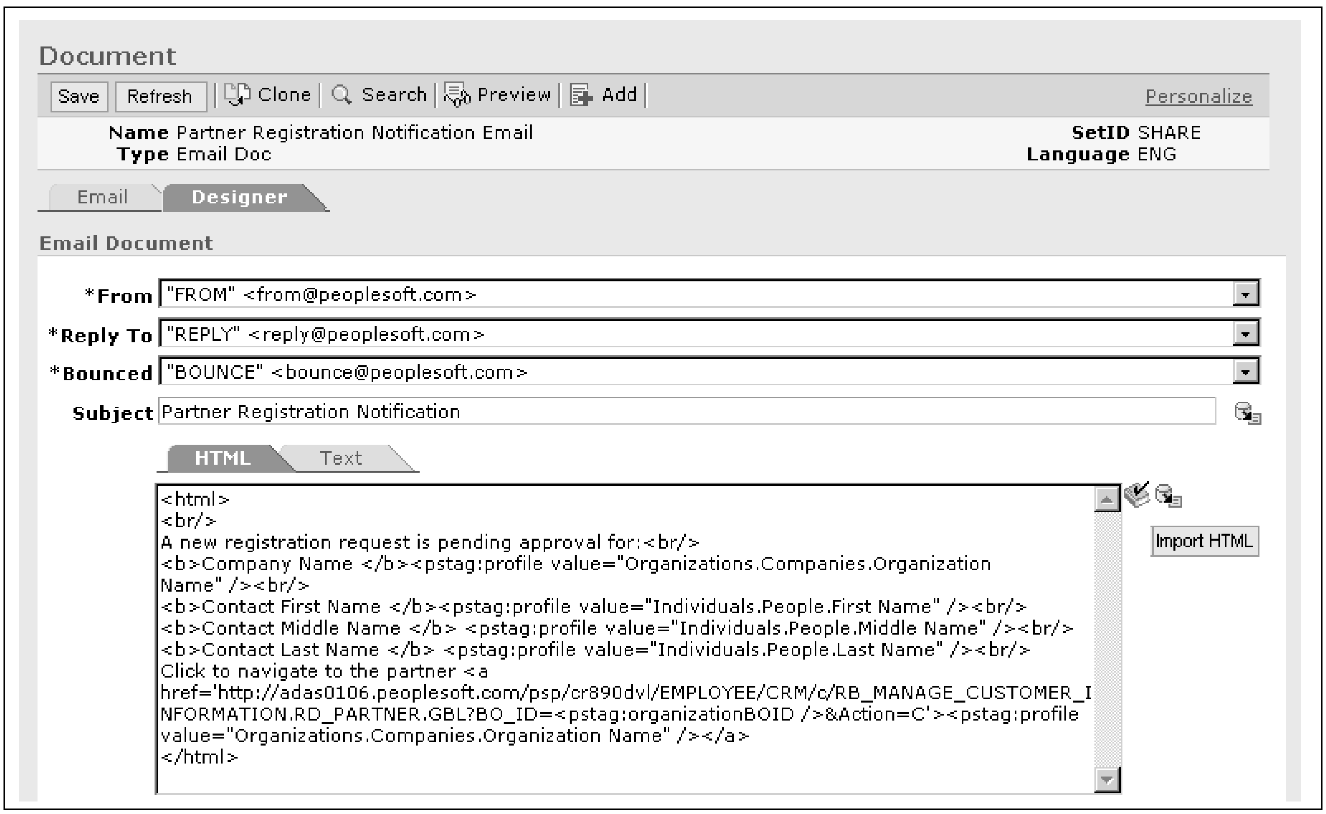
SetID	Document	Type	Created By	Date Created
SHARE	Partner Registration General Information	Web	PSCR	03/01/2004
SHARE	Partner Registration Contact Information	Web	PSCR	03/01/2004
SHARE	Partner Registration Confirmation Email	Email	PSCR	03/01/2004
SHARE	Partner Registration Notification Email	Email	PSCR	03/01/2004
SHARE	Partner Registration Confirmation	Web	PSCR	03/01/2004

Document Designer page

Updating the Notification URL

Open the *Partner Registration Notification Email.*

Update the <pia server path> portion of the URL in the document text to point to the PIA server, as shown in the example below:

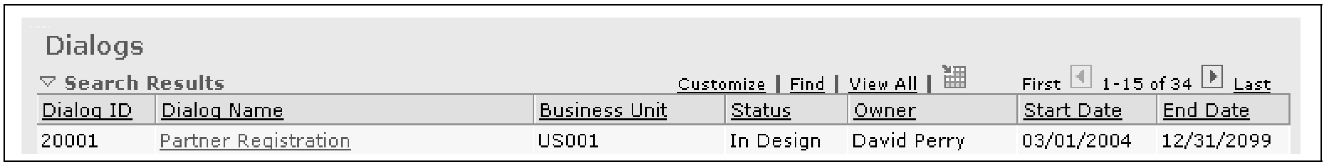


Document page

In the email you will now see a link with the company name that you can click on to navigate directly to the partner company. Click to navigate to the partner *test.*

Validating Sample Dialogs

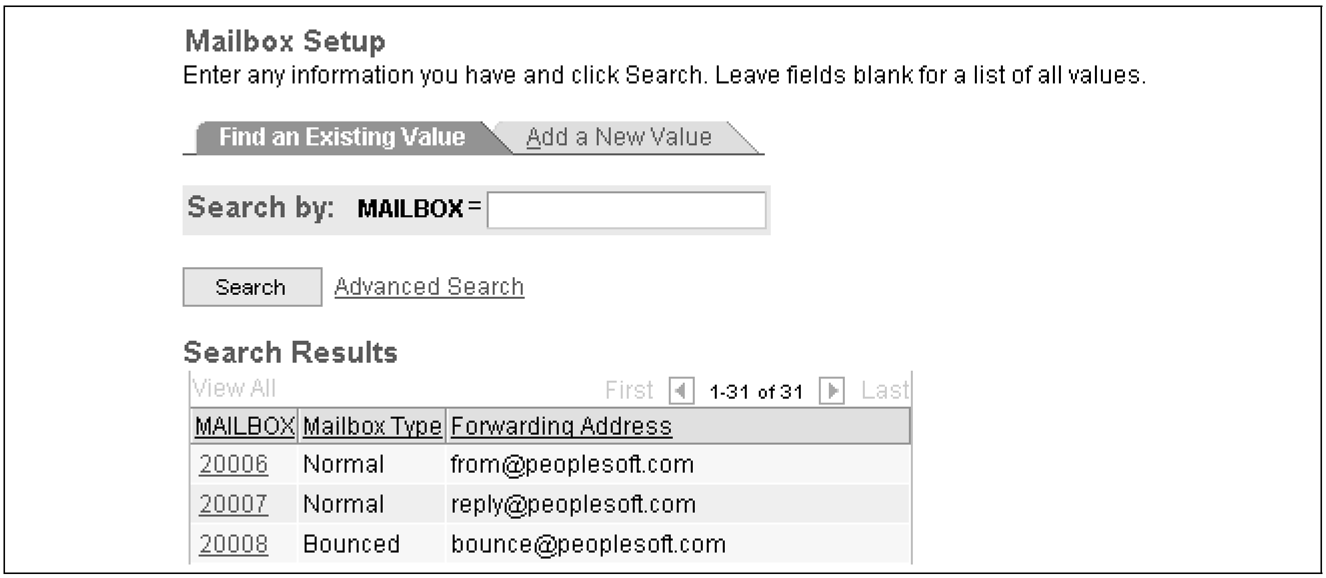
Navigate to Marketing, Dialog Designer. Confirm that the following dialog exists:



Dialogs page

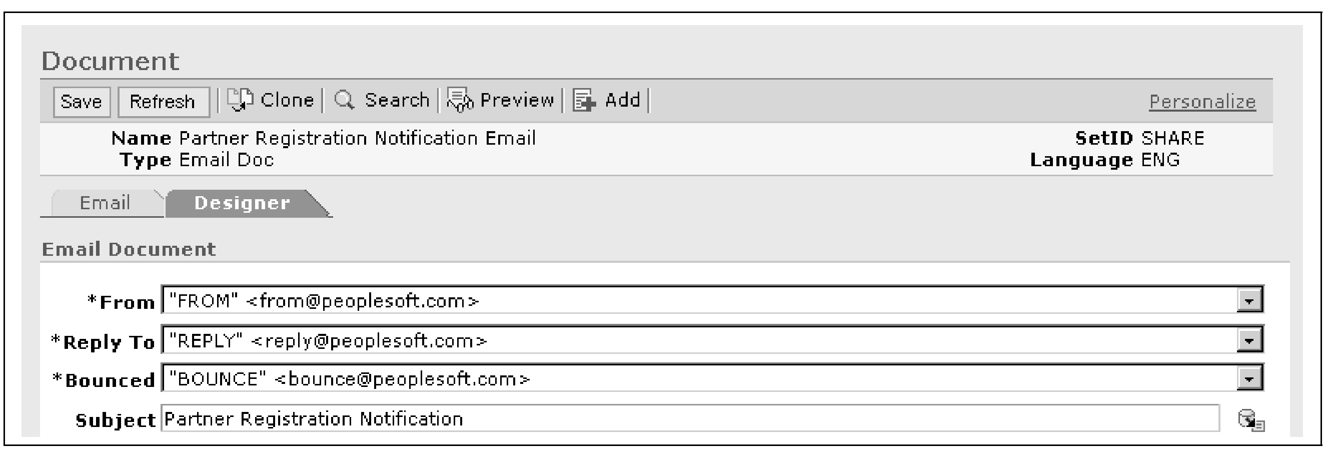
Validating Email Mail Boxes

Navigate to Set Up CRM, Product Related, Online Marketing, MailBox Setup. Set up your own email boxes with valid email addresses.



Mailbox Setup page

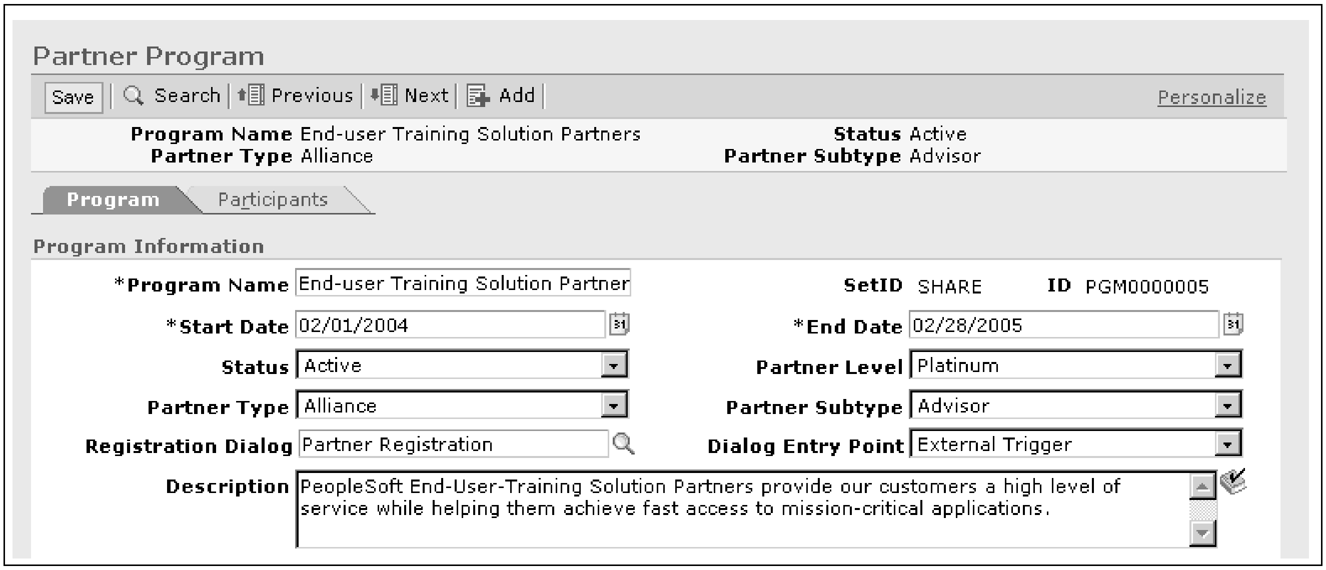
Validate these mailboxes appear on the two partner email documents. Navigate to Marketing, Document Designer. Open *Partner Registration Notification Email* and *Partner Registration Confirmation Email* to confirm.



Document page

Validating the Partner Program

Navigate to Partners, Search Partner Program, Partner Program. Verify that the Registration Dialog and Entry Point are specified for this dialog.



Partner Program page

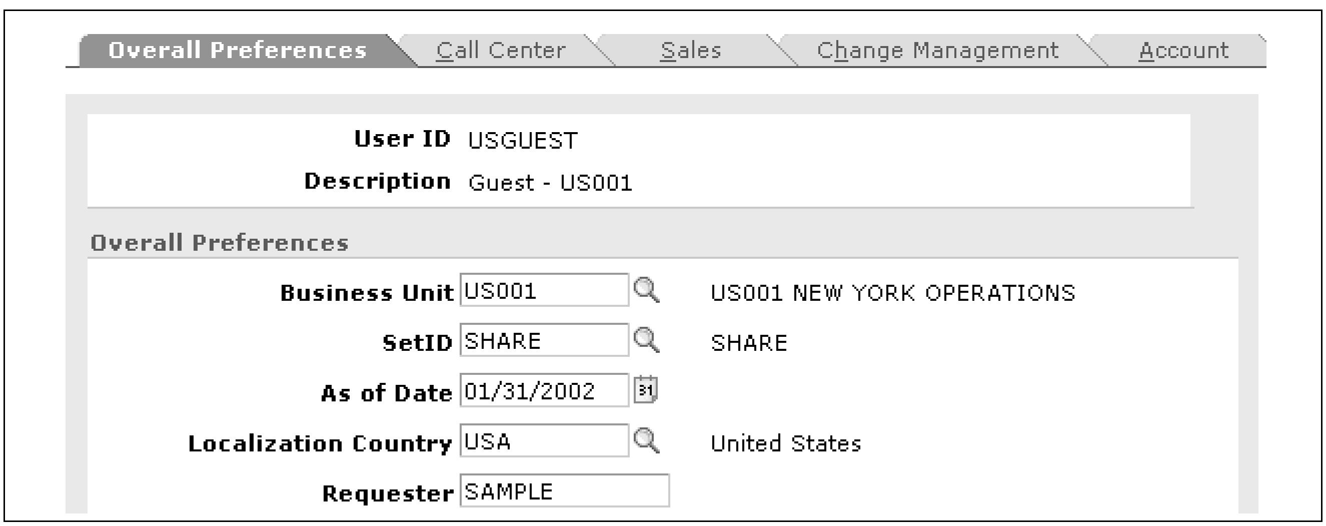
Note. This is setID driven.

Setting Up User Preferences

The registration page filters partner programs by setID if it is specified in the user's preferences. Change the setID of the user you will test with to match the setID of the dialog. Navigate to Set Up CRM, Security, User Preferences, Overall Preferences. These preferences are set up for the guest user that will be used for your Enterprise's CUSTOMER portal site in order to bypass signon.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Setting Up Customer Self-Service".

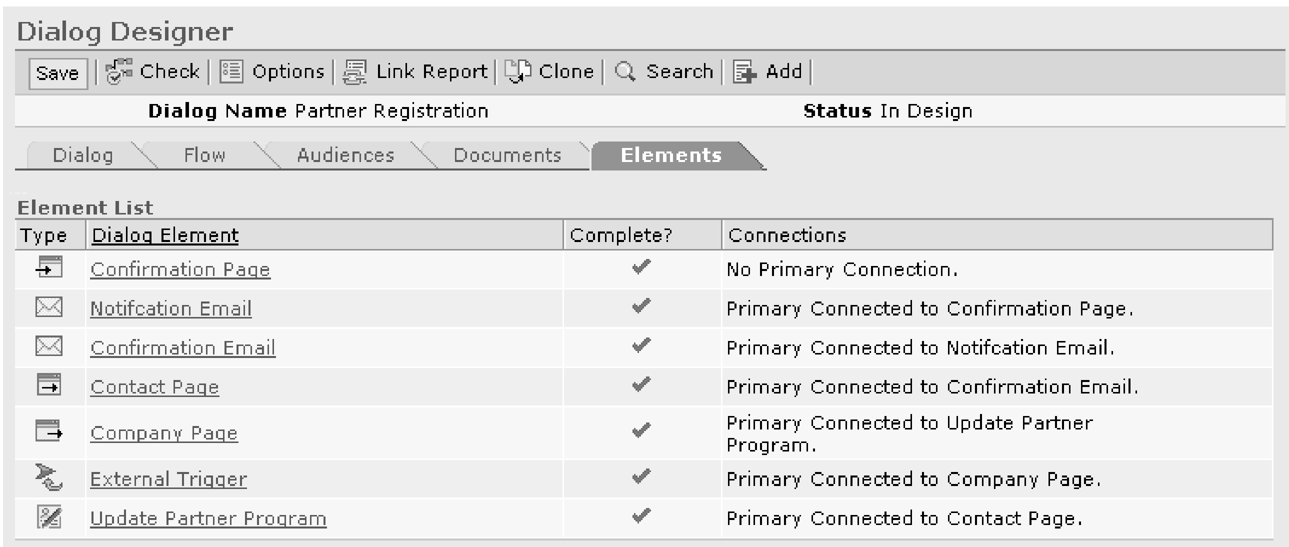
See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Setting Up PeopleSoft Customer Relationship Management Security and User Preferences".



Overall Preferences page

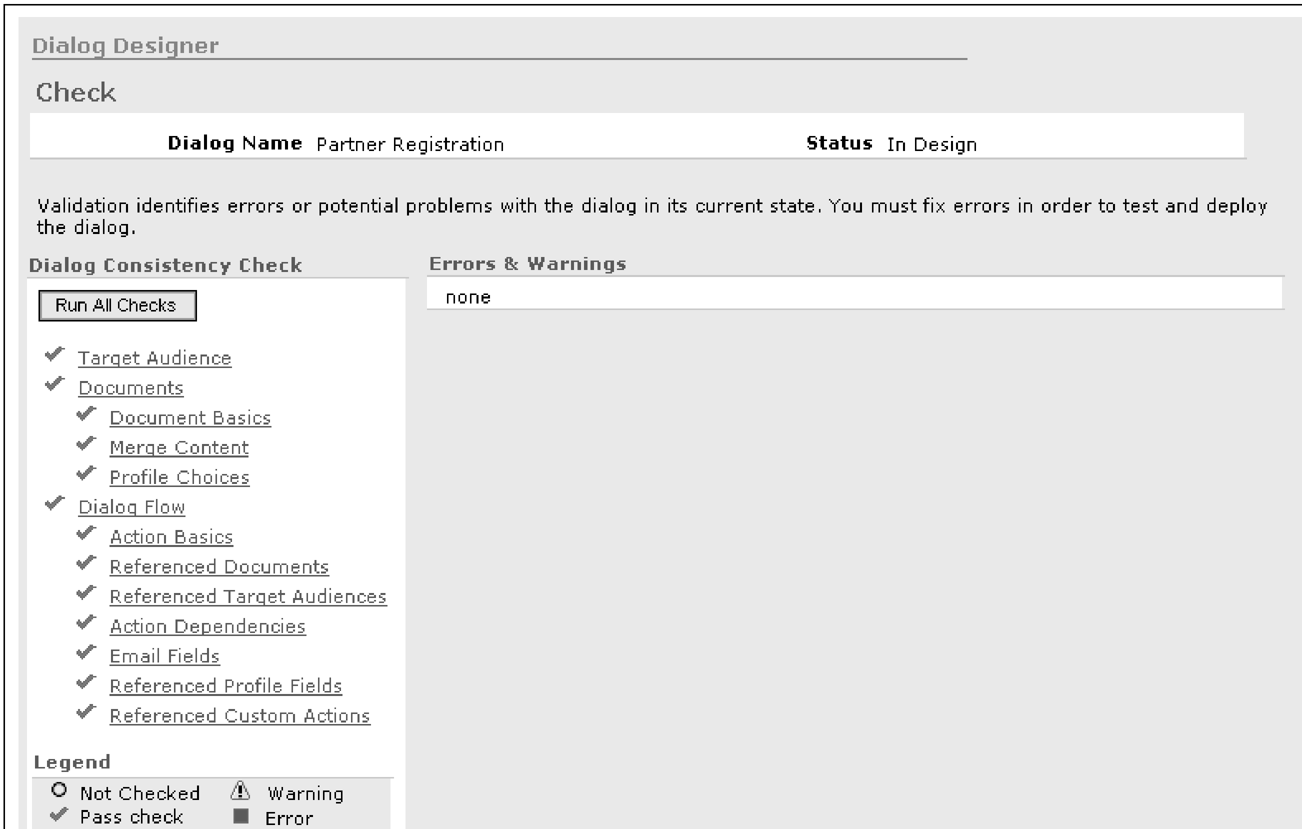
Going Live with the Partner Registration Dialog

Navigate to Marketing, Dialog Designer. Select *Partner Registration.* Confirm that *Update Partner Program* points to the correct partner program.



Dialog Designer - Elements page

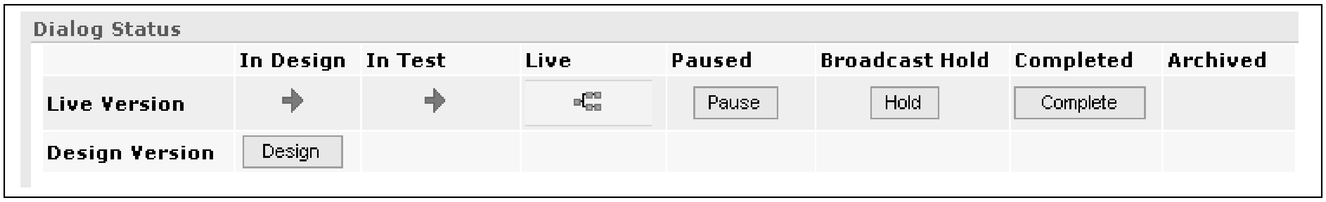
Click the Check button in the toolbar. Click the Run All Checks button.



Dialog Designer - Check page

All should pass the consistency check.

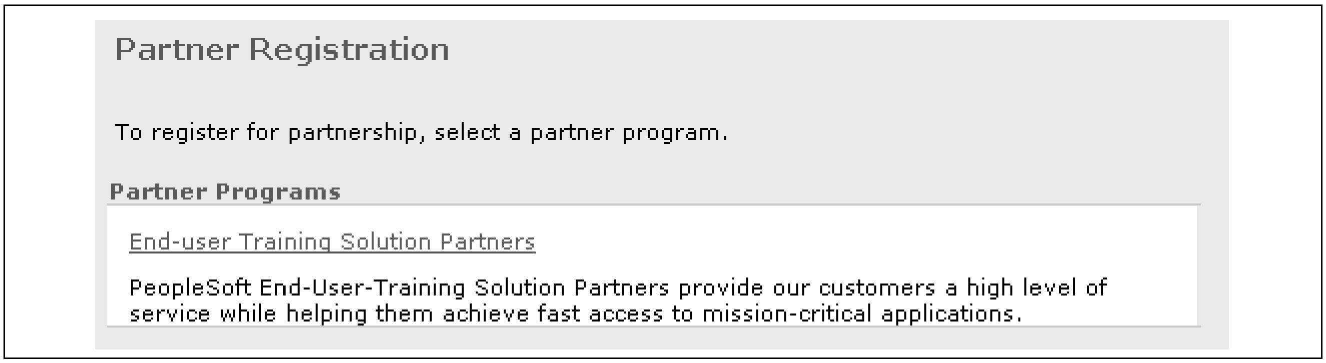
Return to Dialog Designer, Dialog page. Click Go Live. Live status will be confirmed.



Dialog Designer - Dialog Status page

Launching Registration

Access the customer portal registry. The guest user established in the steps above will automatically be used for guest access to the customer registry. Navigate to the Partner Registration to launch a partner registration dialog.



Partner Registration page

Select the partner program you have associated the dialog to. This will launch the dialog as you have configured it. Your partners will be able to fill in this information and register for partnership as you have configured it.

Submit and view the confirmation.

Validating Data

The partner registration data captured is then saved to the Online Marketing Profile tables (organization data is written to the BO_BASIC_ORG table and individual data is written to the BO_BASIC_IND table). The partner organization data is then also saved to the partner profile tables in the business object relationship model or BORM tables.

See Chapter 5, “Creating and Maintaining Partner Profiles,” page 25.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*.

CHAPTER 8

Setting Up Distributed Security for Partner Users

This chapter provides an overview of distributed security for partners, and explains how to:

- Set up distributed security for partner users.
- Manage partner user groups in self-service.

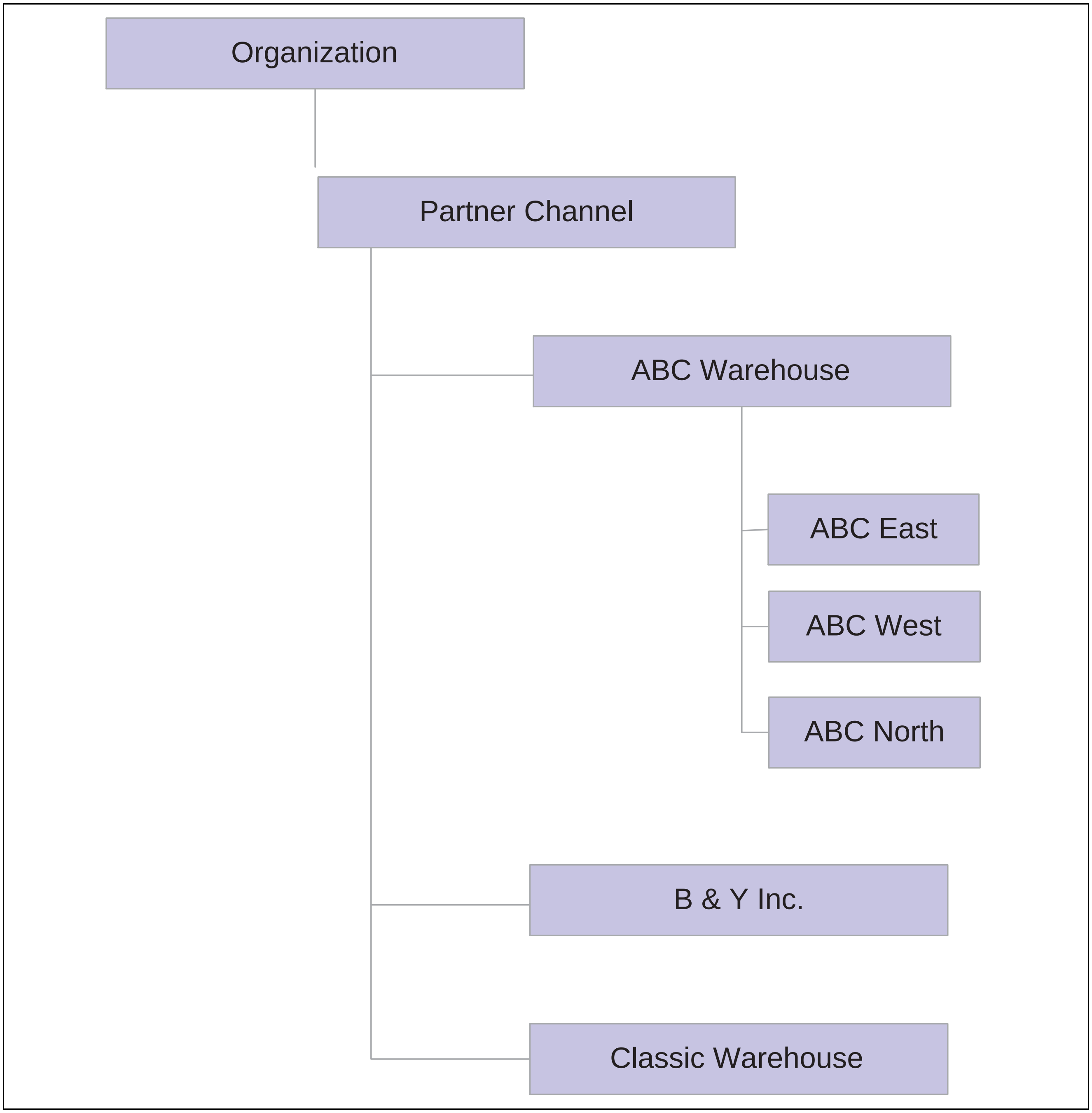
Understanding Distributed Security for Partners

Distributed security or delegated administration provides the ability to delegate administrative responsibility to multiple administrators and managers in an organization in a secured fashion. Distributed security for partners enables partner administrators to set up team members for the user groups they manage and also define subordinate user groups. Given the potentially large numbers of partners that an enterprise can do business with, it is absolutely critical for a partner to be able to manage application access and permissions for their own employees.

Centralized administration in a partner-intensive environment is extremely complex to manage and often doesn't scale in practice. By allowing partners to self-register, setup users, maintain their own profiles, and create and manage their own organizational groups, PeopleSoft's PRM solution addresses the need to simplify and decentralize partner management.

For distributed security and partner self-service requirements, the enterprise channel operations manager determines what roles and access privileges a partner administrator is allowed to assign when he creates additional accounts for partner employees. Ideally, a partner administrator should be able to customize the access privileges and further restrict what a partner user has access to, as long as any new access combination still remains within the confines of what the enterprise channel manager delegated in the first place.

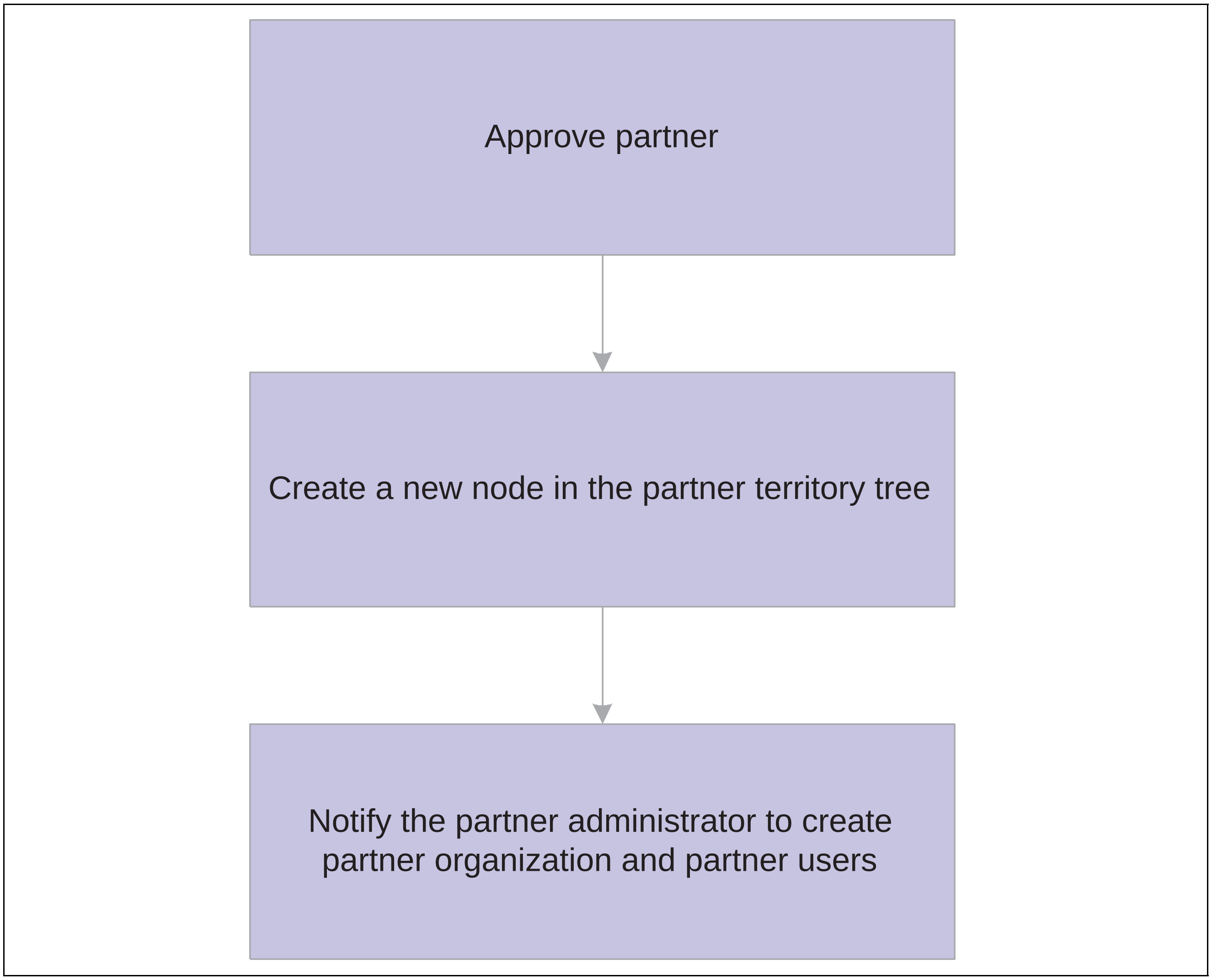
Following is an example of delegated security where the Enterprise Administrator or Channel Manager sets up user groups in the organization hierarchy for each partner company, for example ABC Warehouse, B&Y Inc, and Classic Warehouse.



Sample organization hierarchy

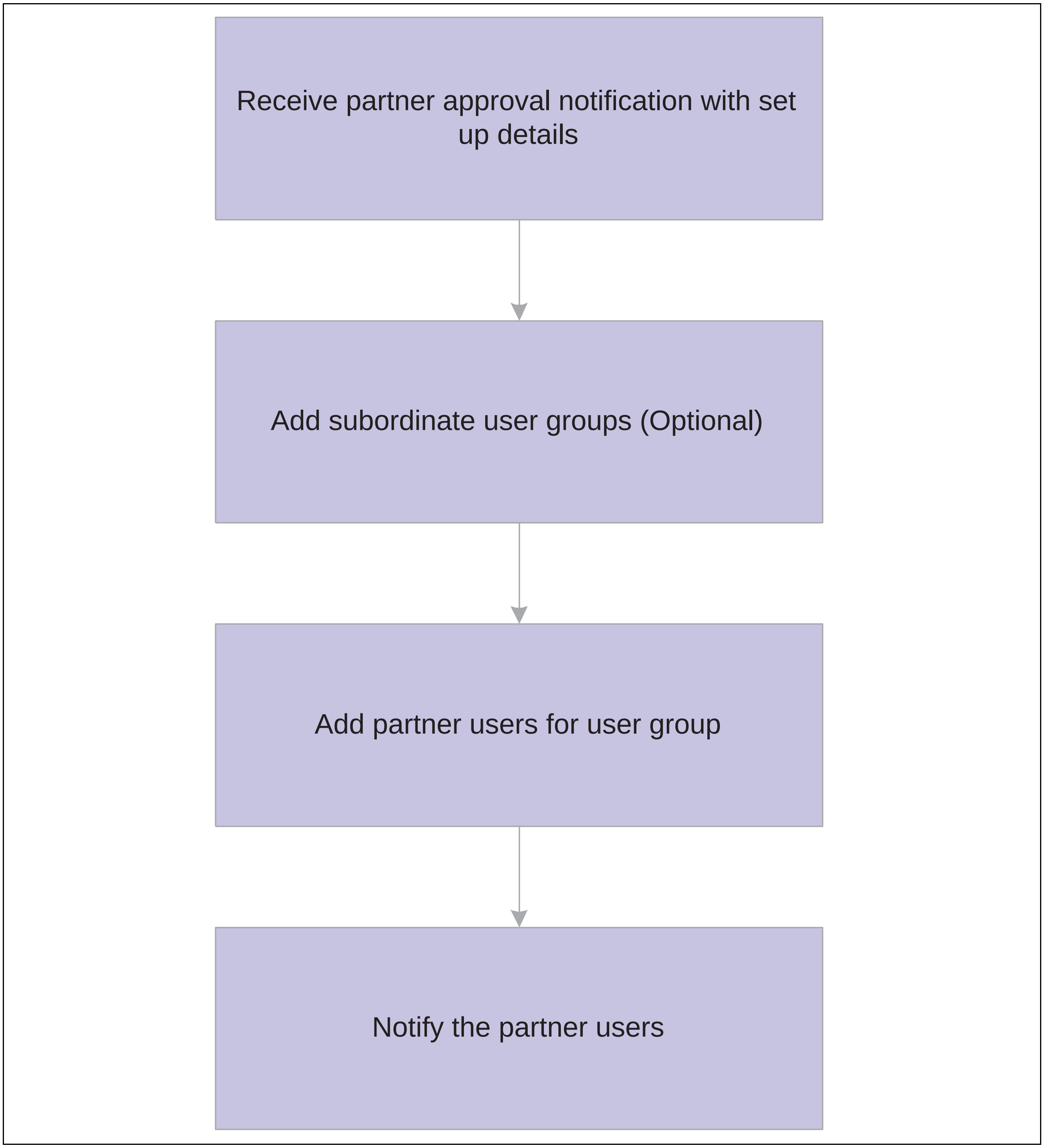
Understanding the Distributed Security Process Flow

The following diagram illustrates a distributed security process flow. Your enterprise may define a different process flow to suit your unique business needs.



Distributed security process flow for the enterprise channel manager

As the first step in the distributed security process, the partner company applies, and provides information about the company and a single point of contact, such as a partner administrator. The enterprise administrator sets up user groups in the organization hierarchy for each partner company. Once the enterprise completes the task of setting up partner user groups, an email notification is sent to the partner administrator. The enterprise grants the designated partner administrator access to the system.



Distributed security process flow for the partner administrator

The partner administrator can now define teams and maintain the hierarchy for their organization. For example, the partner administrator for ABC Warehouse has the ability to set up multiple team members in the ABC Warehouse user group. This feature enables the partner administrator to add subordinate groups below the ABC Warehouse user group. The Territory tree is used to model the partner organization hierarchy.

The partner administrator can create partner employees in the system by defining User IDs and default passwords and automatically emailing this information to the respective users.

Distributed security also provides the partner administrator with maintenance functionality. The partner administrator can:

- Add subordinate user groups.
- Transfer partner users from one user group to another.
- Activate and deactivate partner users.
- Reset passwords.

See Also

Chapter 6, "Setting Up Security for Partners," page 47

Setting Up Distributed Security for Partner Users

This section discusses setting up distributed security for partner users.

Pages Used to Set Up Distributed Security for Partner Users

Page Name	Object Name	Navigation	Usage
Partner Company	RD_PTNR_ORG	Partners CRM, Search Partner Company, Partner Company, Summary, Organization	Create a partner organization structure.
Manage Partner Users	RD_PTNR_USER_SRCH	Partners CRM, Manage Partner Users, Manage Partner Users	Add partner users.
Tree Manager	PSTREEMGR	Tree Manager, Tree Manager	Add partner user groups to the territory tree.

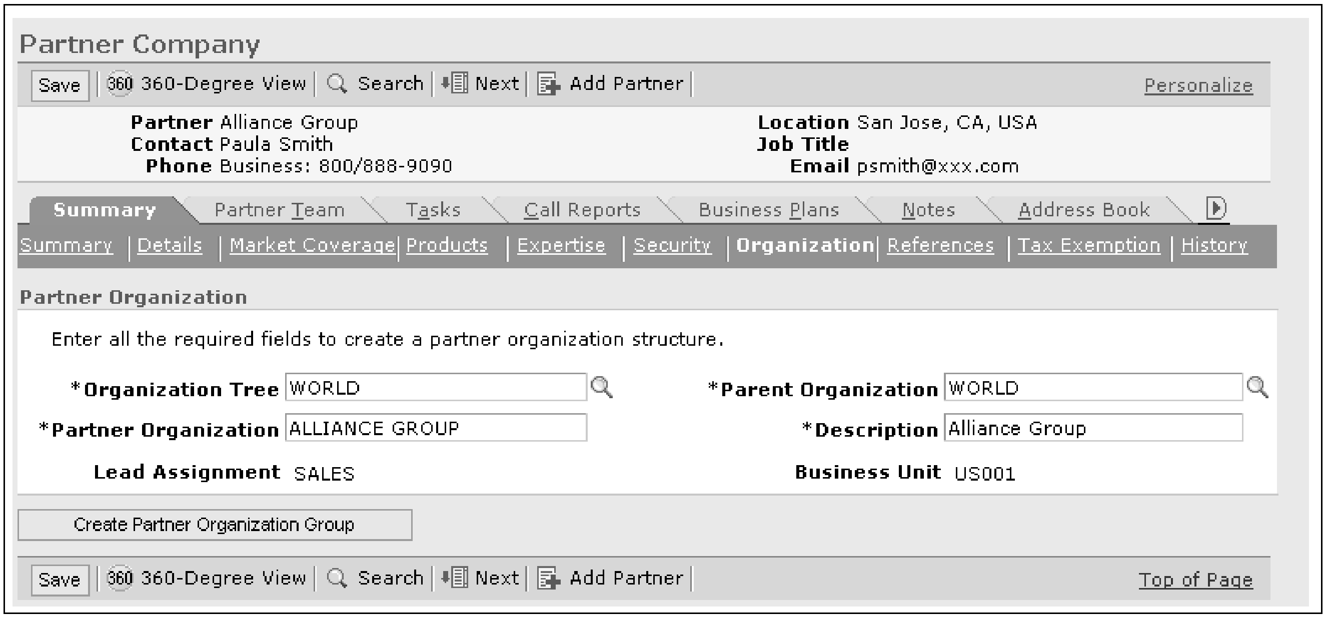
Setting Up Distributed Security

This section discusses how to:

- Create a partner organization structure.
- Add partner users.
- Add partner user groups to the partner organization structure /territory tree.

Creating a Partner Organization Structure

Access the Partner Company - Organization page.



Partner Company - Organization page

Organization Tree Select the organization tree that the partner organization will belong to.

Note. The tree prompt is restricted to those that the Enterprise user has access.

Parent Organization Select the parent organization for the tree. The prompt is restricted to those organizations or territories that have Business Units that are related to the setID of the Partner company.

Partner Organization Enter the name of the partner organization.

Description Enter the short description of the partner organization.

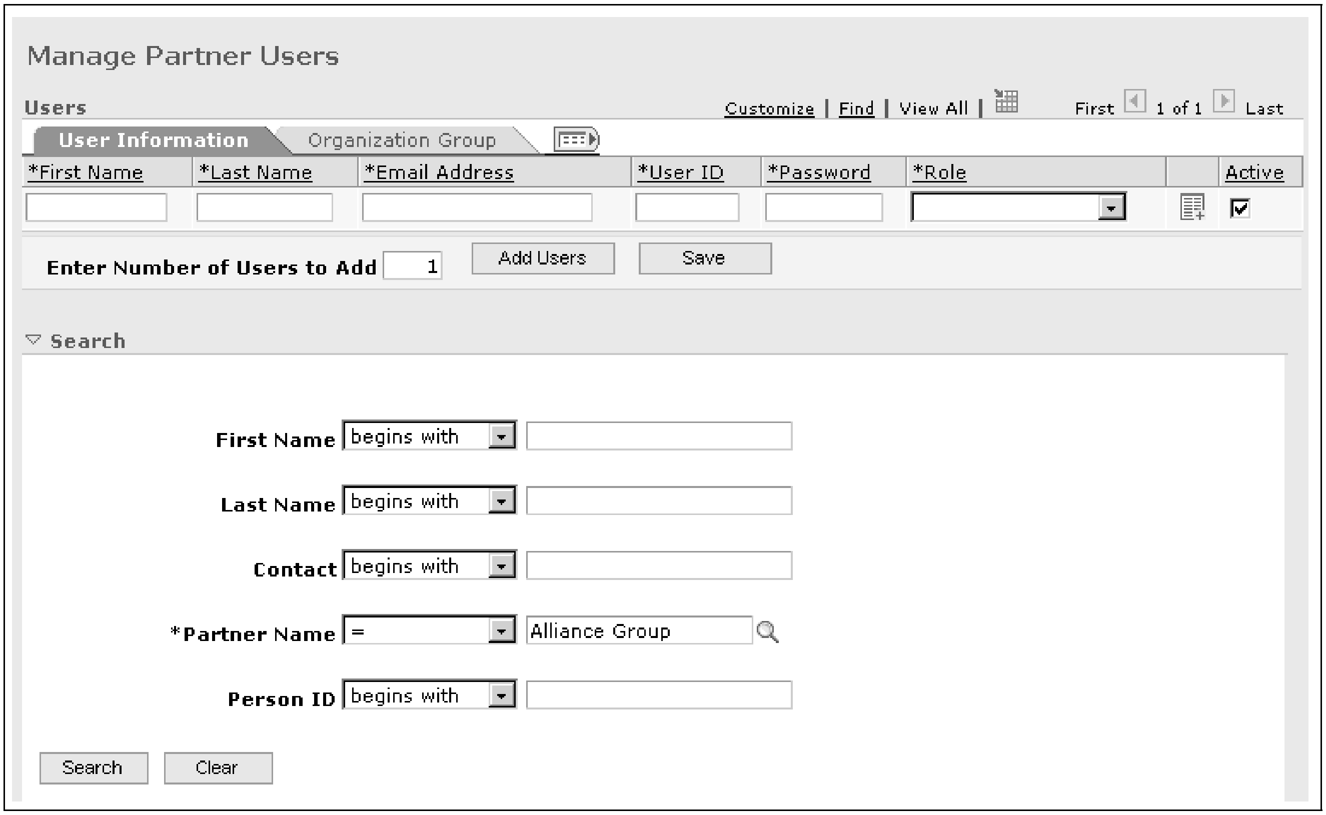
Lead Assignment The system displays the lead assignment. The lead assignment is defaulted from the Parent Organization Lead Assignment and copied to the Partner Organization.

Business Unit The system displays the business unit. The Business Unit is defaulted from the Parent Organization Business Unit and copied to the Partner Organization.

Create Partner Organization Group Click the Create Partner Organization Group to create the partner group.

Adding Partner Users

Access the Manage Partner Users page.



Manage Partner Users - User Information page

Use this page to add users to the user group. The user can also update Password information through self-service. Select a role for each user.

See Chapter 5, “Creating and Maintaining Partner Profiles,” Creating and Managing Partner Users, page 42.

Adding Partner User Groups/Child Territories to the Territory Tree

Access the Search Territories page under Sales, Search Territories menu.

The Sales Territory tree is used to model the partner organization. This organization hierarchy can be setup using the pages above, or the enterprise administrator or channel manager can access the territory tree in sales to add partner user groups and sub-organizations.

See *PeopleSoft Enterprise Sales 8.9 PeopleBook*, “Working with Territories”.

Managing Partner User Groups in Self-Service

This section discusses:

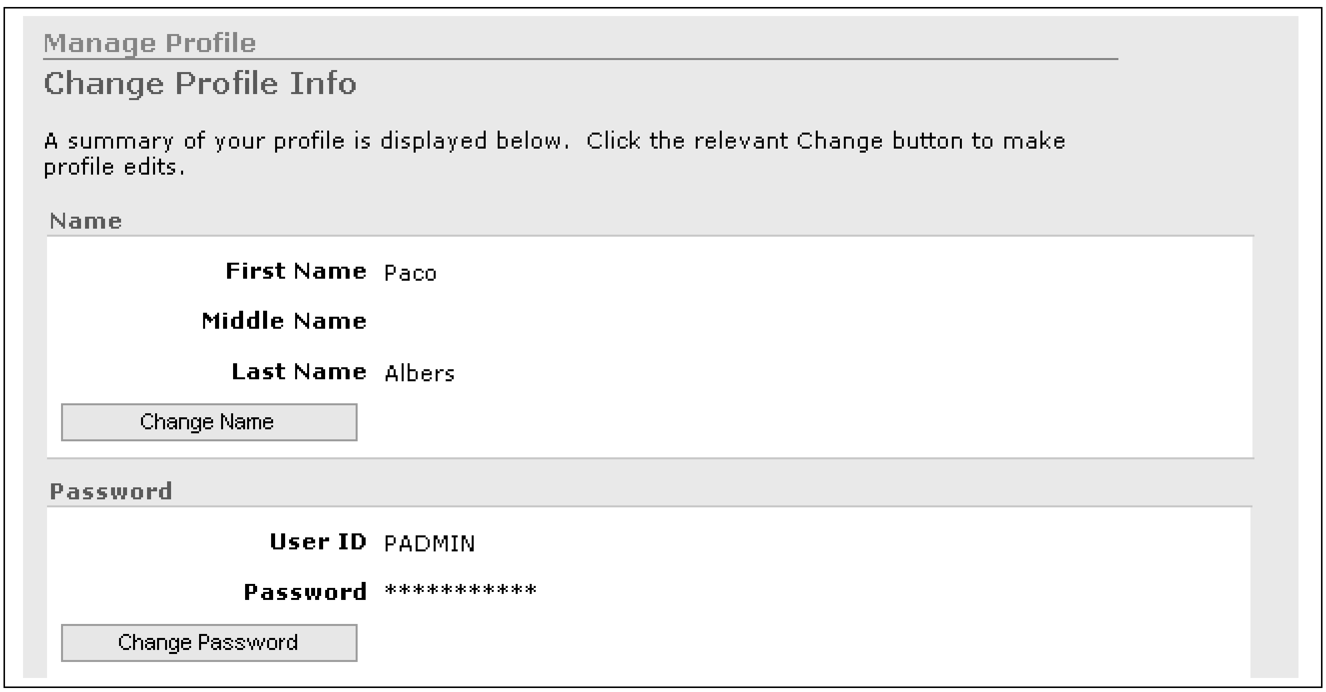
- Managing profiles.
- Managing partner user groups.
- Maintaining partner organization groups.
- Searching organization groups.

Pages Used to Manage Partner User Groups in Self-Service

Page Name	Object Name	Navigation	Usage
Manage Profile	RX_NAME_SIGNIN	Change Profile Info, Manage Profile	Change user name or password.
Register Users - User Information	RD_PTNR_USER_SRCH	Register Users, Register Users, User Information	Administer users in the partner user group.
Additional Roles	RD_PTNR_USER_ROLES	Click the Additional Roles icon.	View, add, or delete additional roles for the user.
Register Users - Organization Group	RD_PTNR_USER_SRCH	Register Users, Register Users, Organization Group	Add users to groups within the partner organization.
Search Organization Groups	RSF_TR_PTNORG_SRCH	Search Organization Groups	Search for groups in which the user is the owner or the manager or both.

Managing Profiles

Access the Manage Profile page.

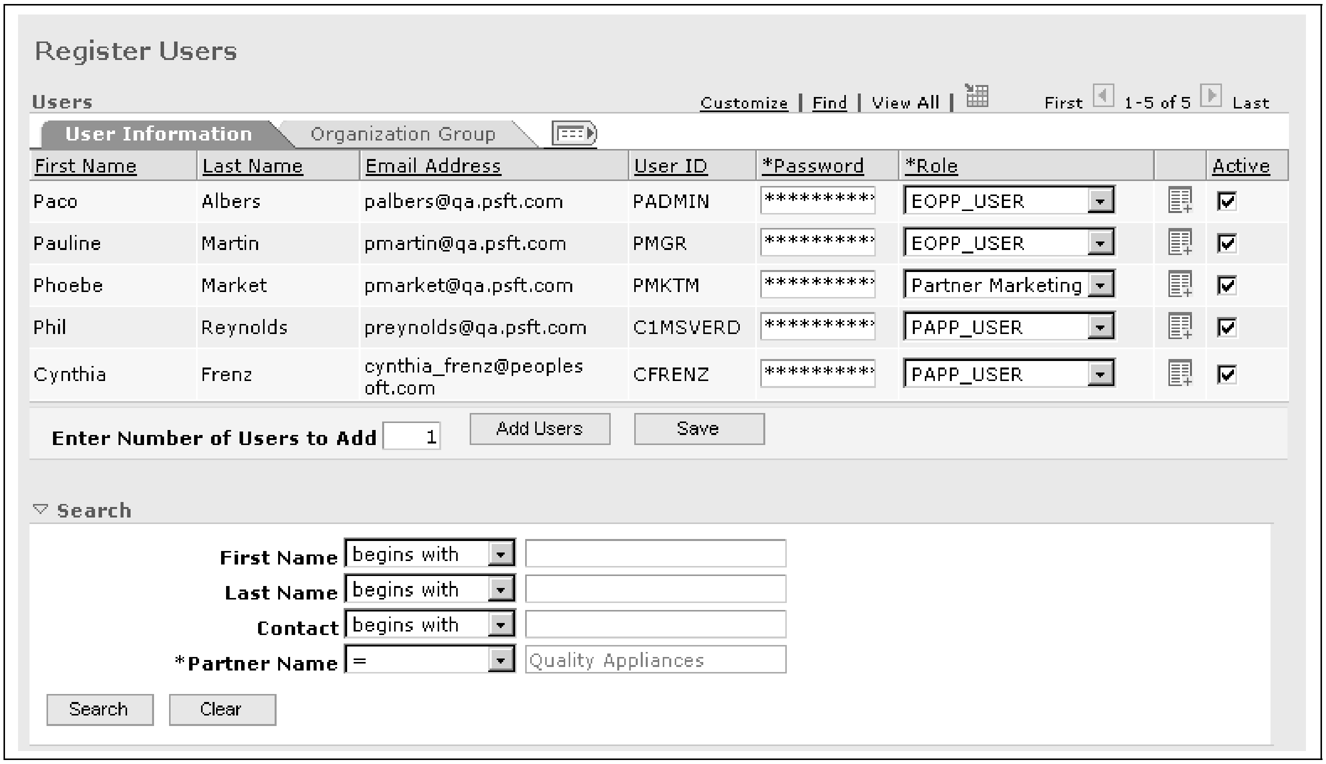


Manage Profile page

Users can change their names or passwords on this self-service page.

Managing Partner User Groups

Access the Register Users - User Information page. The Register Users page will list all of the partner users for the partner company associated with the partner administrator that is logged in. The partner company is derived from the User Preference information associated with the partner administrator.

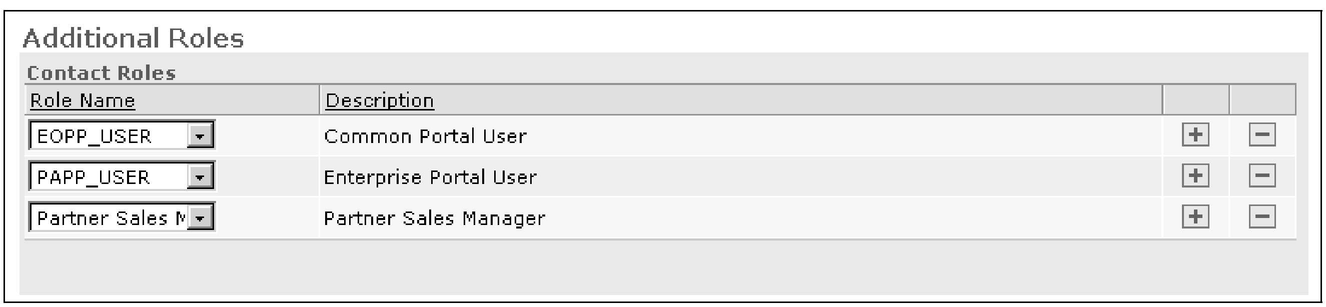


Register Users - User Information page

The partner administrator uses this self-service page to administer the users in the partner organization. The administrator can add or delete users and keep track of all users within the partner organization. Multiple roles can be selected for the user. It is required to add EOPP_USER and PAPP_USER roles to get access to PeopleSoft system. Besides these two roles, the Partner Administrator should select additional roles such as Partner Representative or Partner Sales Manager as appropriate for each user created. Note that in order to view, assign or delete multiple roles to a user, use the Additional Roles icon next to the role drop down.

Adding Multiple Roles for a User

Access the Additional Roles page.

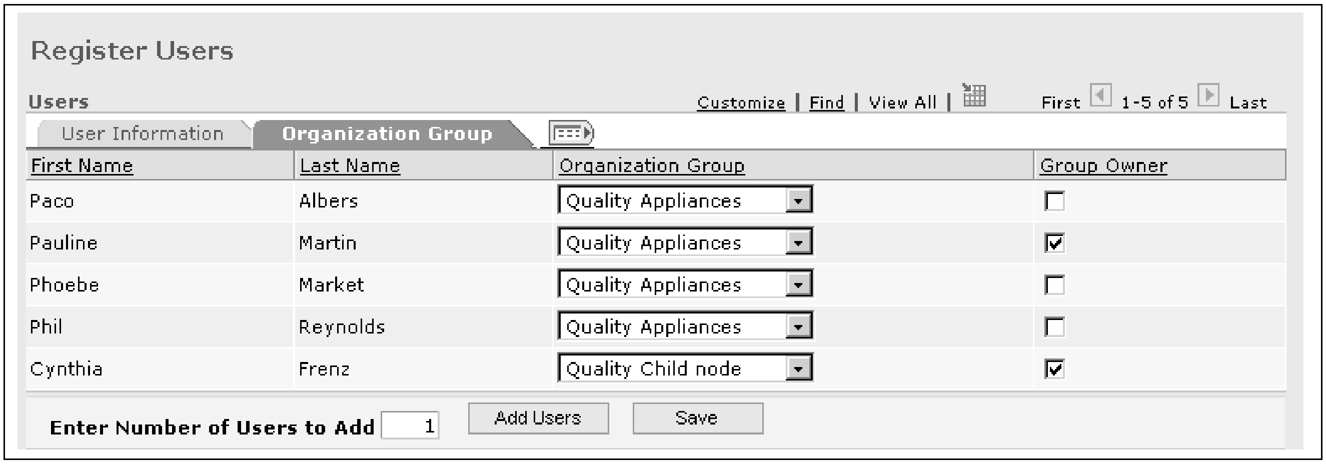


Additional Roles page

You can view all roles for a user and add or delete roles as required.

Managing Partner Organization Groups

Access the Register Users - Organization Group page.

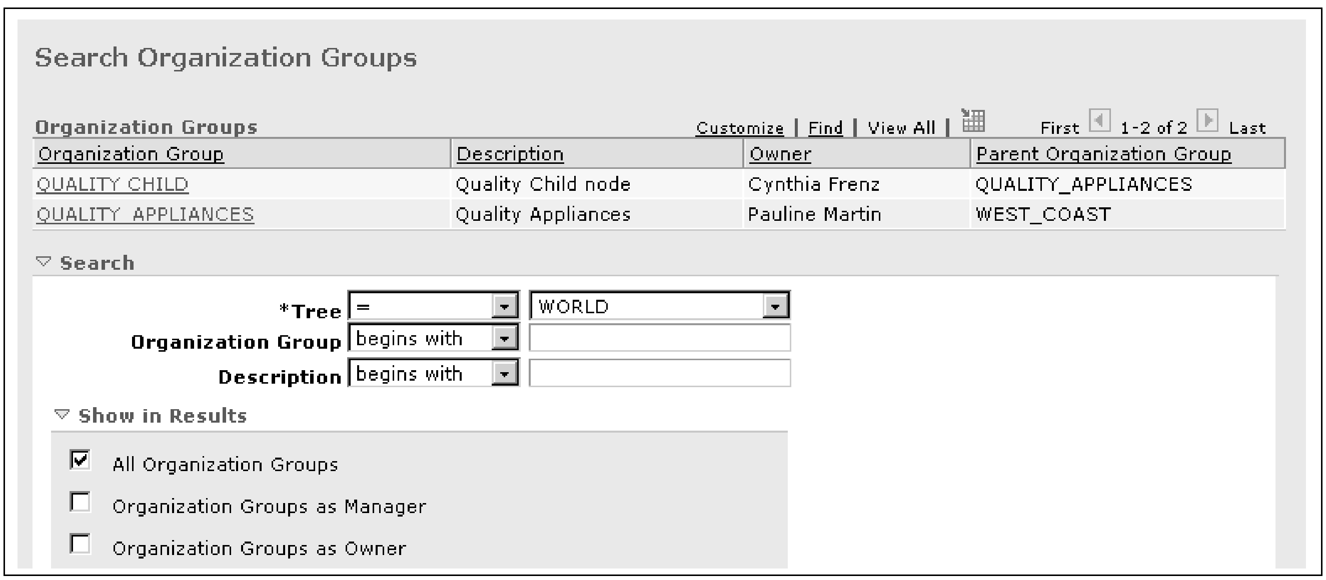


Register Users - Organization Group page

Partner administrators can view or change the organization group for registered users. Users can also be defined as the Group Owner.

Searching Organization Groups

Access the Search Organization Groups page.



Search Organization Groups page

Partner administrators can search for and view organization groups for which they are the manager, the owner, or both.

CHAPTER 9

Executing Partner Relationship Management Transactions

This chapter provides an overview of partner enabled transactions, and discusses how to:

- Create partner marketing campaigns and add tasks.
- Generate partner leads.
- Add orders and quotes by partners.
- Maintain service management orders by partners.
- View financial accounts.
- Add partners to support cases.

Understanding Partner Transactions

Partner company and contact information is available across the channels supported by Peoplesoft CRM applications. The enterprise can view and assign partner information within the context of many employee or enterprise facing transactions (found in the employee portal registry), customer facing transactions (found in the customer portal registry), and partner facing transactions (found in the partner portal registry). Within the employee facing transactions, partner data can be viewed and updated on the campaign, lead, opportunity, quote, order, service management order and case. Partner data can also be viewed for financial vertical customers on the financial account. Within the customer facing transactions, partner data can be viewed on the order and quote, and updated on the case and product registration transactions. Finally, the partner company is extended a set of transaction to act on behalf of your enterprise. Those transactions include the marketing program or campaign, lead, quote, order, service management order, and view financial account information. There are additional secondary or supporting transactions that a partner has access to as well. Those secondary transactions include product catalog, product configuration, and product advice or recommendations. Additional transactions exposed to the partner include partner profile, partner organization hierarchy and security maintenance.

See Chapter 5, “Creating and Maintaining Partner Profiles,” page 25; Chapter 4, “Creating Partner Programs,” page 11 and Chapter 6, “Setting Up Security for Partners,” page 47.

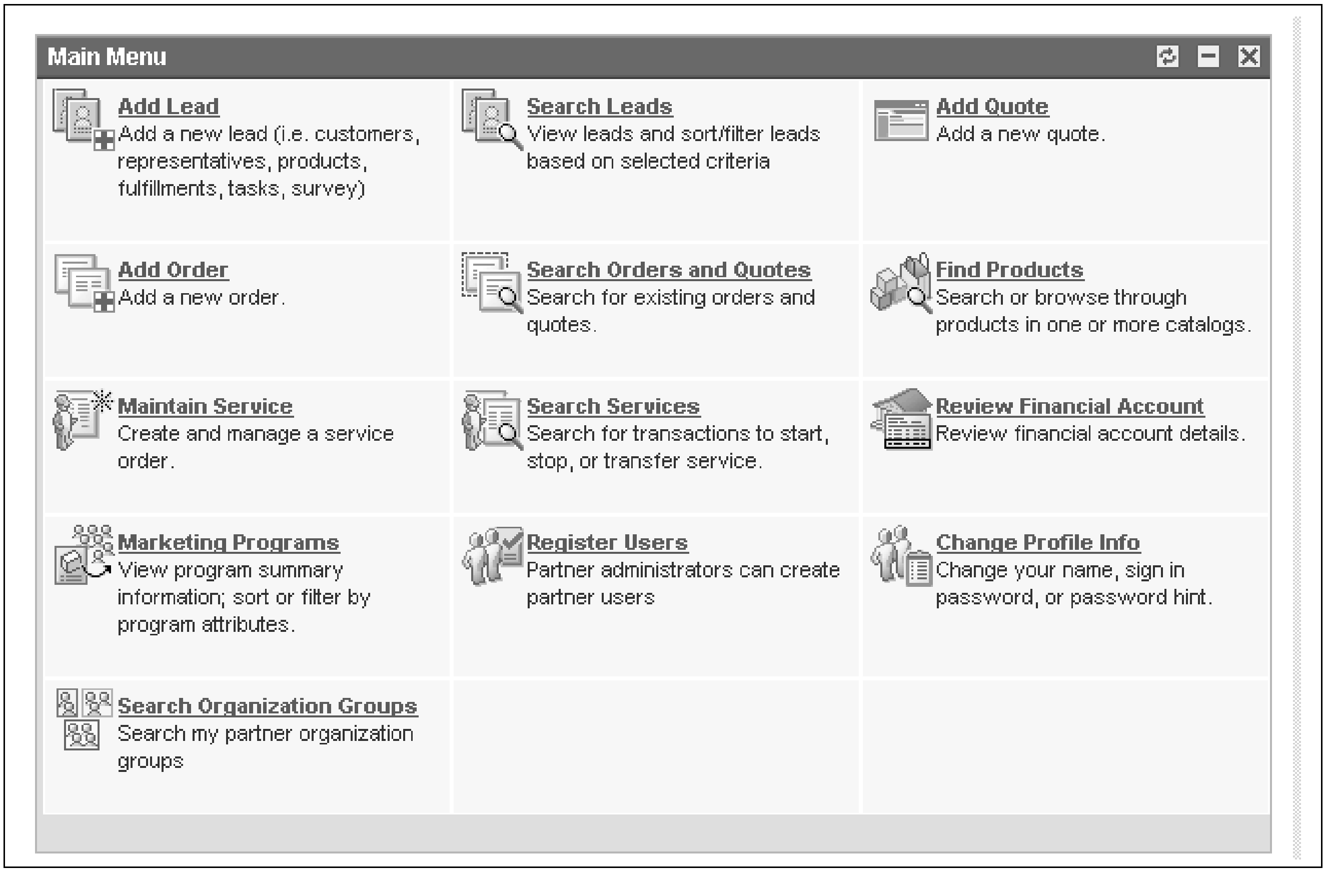
PeopleSoft Partner Portal

We deliver a PeopleSoft Partner Portal which enables partner representatives to transact on behalf of the Enterprise using the business processes exposed in the partner portal registry.

The transactions in the PeopleSoft Partner Portal include the ability to:

- View marketing campaigns and adding tasks to marketing campaigns.
- Add and updating leads.

- Add and updating quotes and orders.
- Add service management orders.
- View financial account information for customers.
- Update profile information.



The PeopleSoft Partner portal is delivered with a set of role filtered left hand menu navigation as well as a matching target page navigation page that is represented with function appropriate buttons

Partner Search

Search functionality has been enhanced to maintain security where the enterprise has exposed partner data across the main CRM transaction set. Maintaining the appropriate level of data access is critical in order to ensure that partners have access to only the customers that they have been secured to view and transact with. With the appropriate level of security defined using the CRM application security framework, the presence of partner data on a transaction will automatically restrict the customer search that takes place so that only the restricted list of customer for the partner is displayed. Additionally, if a customer is entered on a transaction, and subsequent entry of the partner data takes place, the partner prompt will be limited to only those partners that have access to the customer already on the transaction.

Partner and customer search restrictions are in force across all of the transactions covered in this chapter where partner data is exposed.

See Chapter 8, “Setting Up Distributed Security for Partner Users,” page 67; Chapter 6, “Setting Up Security for Partners,” page 47 and *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences”.

Creating Partner Marketing Campaigns

This section provides an overview of partner marketing campaigns and discusses how to:

- Update partner marketing campaigns.
- Update activities for marketing campaigns.
- Update tasks for marketing campaigns.
- View cost information for marketing campaigns.
- View cost information for marketing campaigns.

Understanding Partner Marketing Campaigns

By extending marketing functionality to PeopleSoft Partner Relationship Management, we enable the Enterprise Channel Manager to add partner members to an Activity Team and add partner companies to a list of sponsors. Within the partner organization, a partner manager can view lists of marketing programs or campaigns, and add tasks and notes to a marketing campaign (marketing program). The Enterprise Channel Manager can add partners to program teams, define promotional pricing for partners, disable the Audience icon from the Wave Detail page so the partner cannot access the audience, and allow partners to have display-only access to offers, tasks and costs.

The two types of marketing campaigns where partners are involved are joint marketing campaigns and marketing campaigns targeted at partners.

Joint Marketing Campaigns with Partners

To create a joint marketing program with a partner, the Enterprise users can add partners to marketing programs. Partners themselves cannot create marketing programs. Once a partner has been added to a marketing program, the partner can access the program and they can perform restricted tasks based on their security level.

Note. A partner user cannot create a new marketing campaign by themselves in PeopleSoft Marketing. If they log in to the Enterprise partner portal system as a partner user, security dictates that the relevant buttons and fields are unavailable to them.

Marketing Campaigns Targeted at Partners

The process of creating a marketing campaign directed solely at partners simply involves selecting audiences that consist of partners and creating marketing campaigns for them. The process of creation does not differ from the process that one would follow to create a regular marketing campaign.

See Also

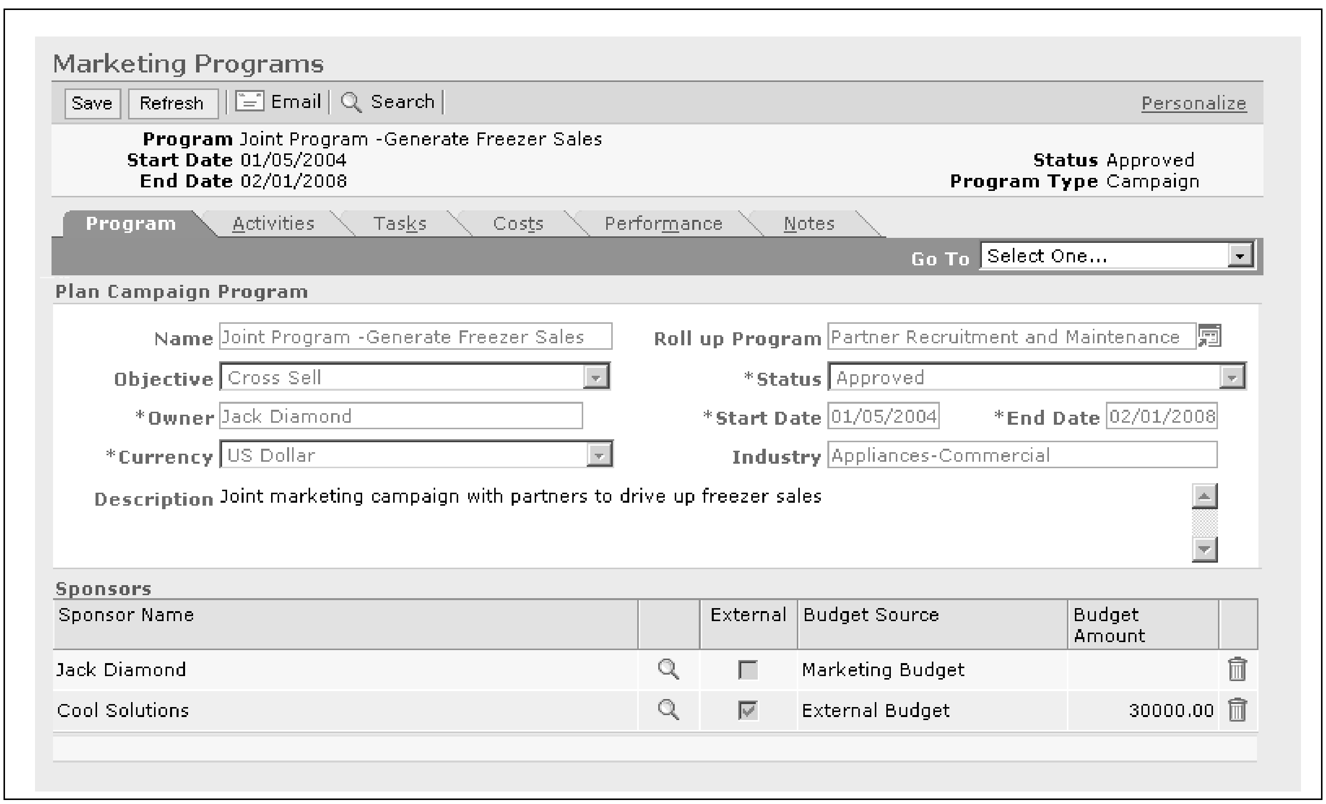
PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook, “Creating Campaigns and Activities”

Page Used to Update Partner Marketing Campaigns

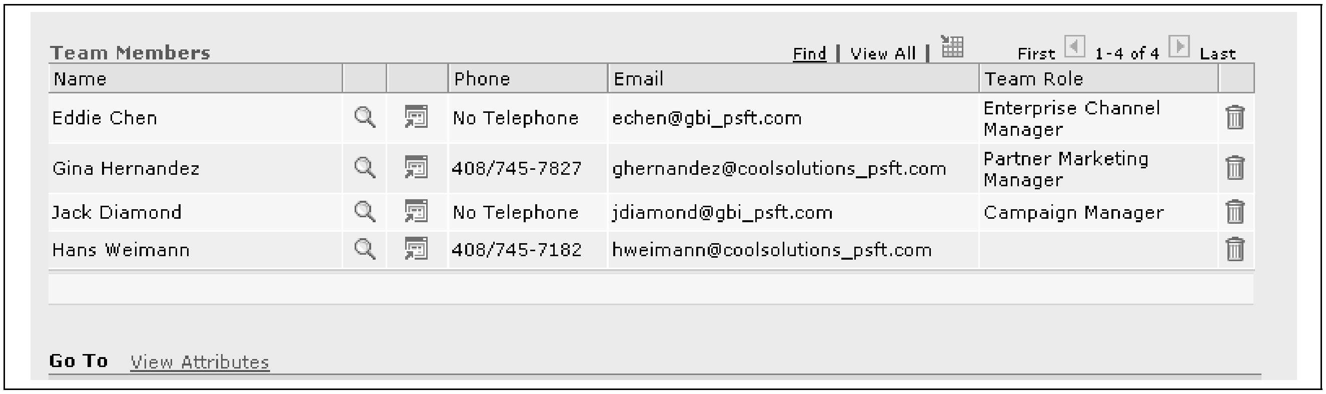
Page Name	Object Name	Navigation	Usage
Marketing Programs — Programs	RA_CAMPAIGN_DETAIL	Partner Portal, Marketing Programs, Marketing Programs	Create or view a joint partner marketing campaign.
Marketing Programs — Activities	RA_CMPGN_ACTIVITY	Partner Portal, Marketing Programs, Activities	View marketing campaign activities.
Marketing Programs — Tasks	RA_CAMPAIGN_TASK	Partner Portal, Marketing Programs, Tasks	Add tasks to marketing campaigns.
Marketing Programs — Costs	RA_CAMPAIGN_COSTS	Partner Portal, Marketing Programs, Costs	View marketing campaign costs.
Marketing Programs — Performance	RA_CMPGN_METRICS	Partner Portal, Marketing Programs, Performance	View marketing campaign performance.
Marketing Programs — Notes	RA_CMPGN_Notes	Partner Portal, Marketing Programs, Notes	Add notes and attachments to marketing campaigns.

Updating Partner Marketing Campaigns

Access the Marketing Programs page.



Marketing Programs — Program page (1 of 2)



Marketing Programs — Program page (1 of 2)

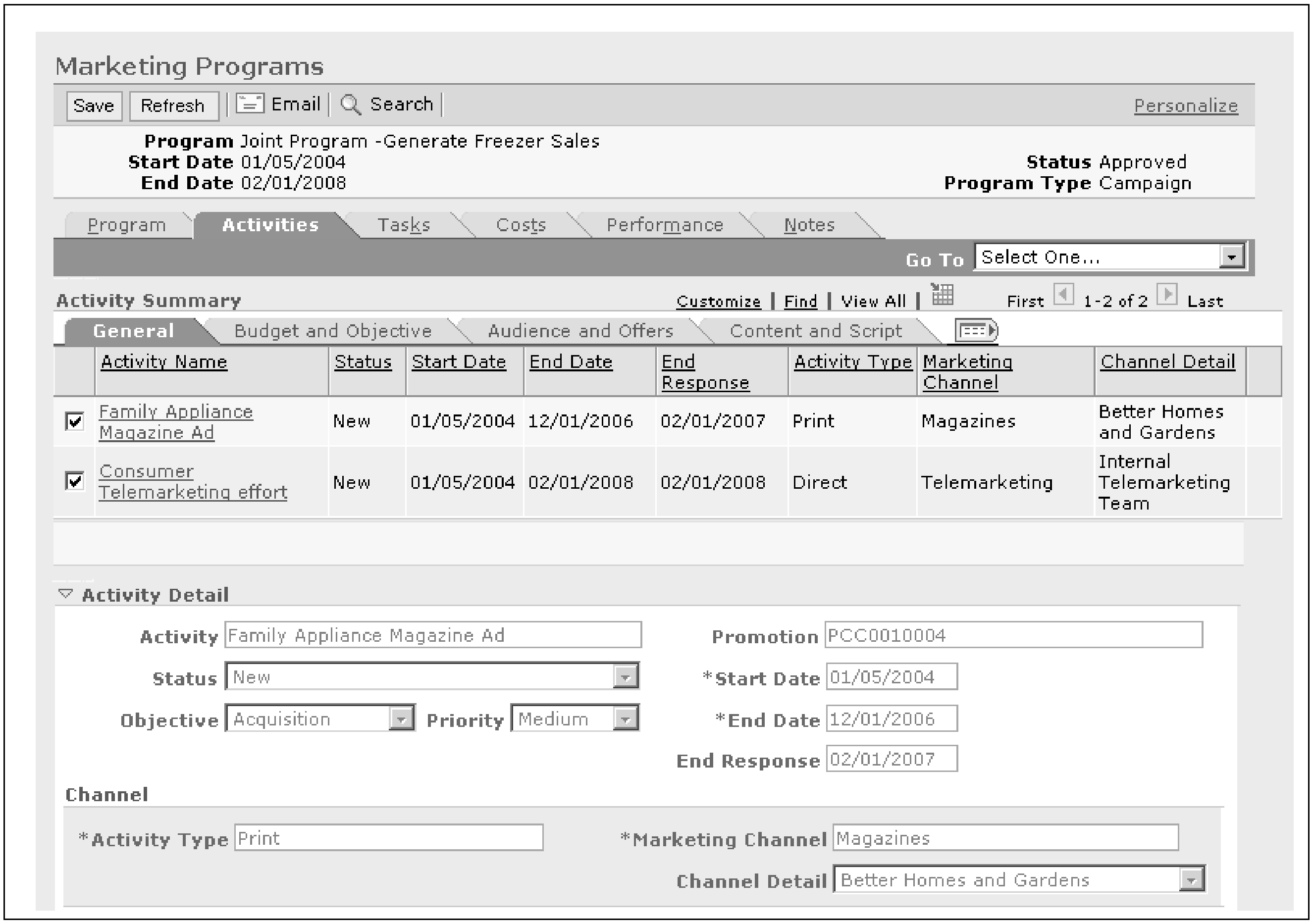
Note. The Activities, Triggers, Audience, and Performance pages—normally available in the Marketing component—are unavailable to partners. All other Marketing Programs pages are display-only for partners. For Tasks, partners can only view and modify tasks that they created or that were assigned or reassigned to them.

See Also

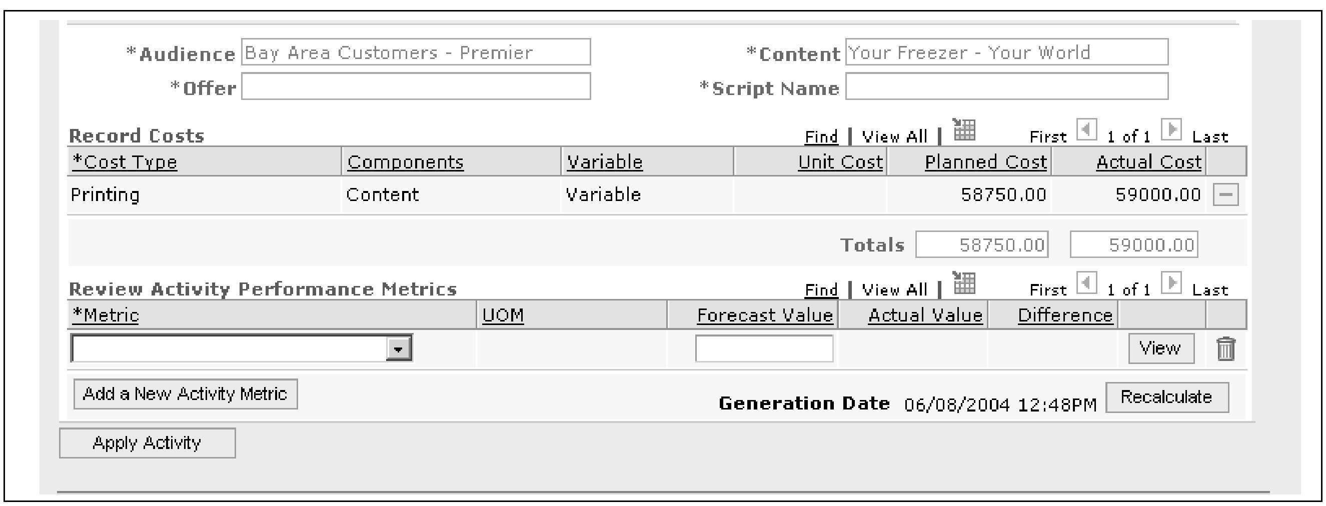
PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook, “Creating Campaigns and Activities,” Creating Campaigns

Updating Activities for Marketing Campaigns

Access the Marketing Programs — Activities page.



Marketing Programs — Activities page (1 of 2)



Marketing Programs — Activities page (1 of 2)

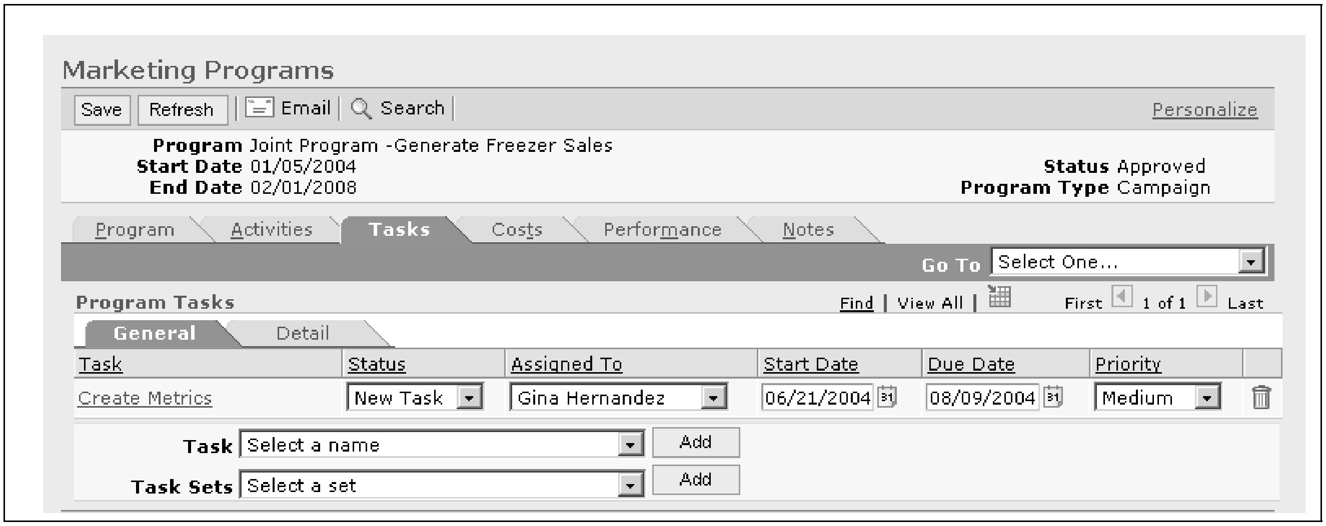
Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 CRM Marketing Applications PeopleBook.*

See Also

PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook, "Using Audiences"

Updating Tasks

Access the Marketing Programs — Tasks page.



Marketing Programs — Tasks page

Tasksand **Task Sets** Partners can add these to the marketing campaign.

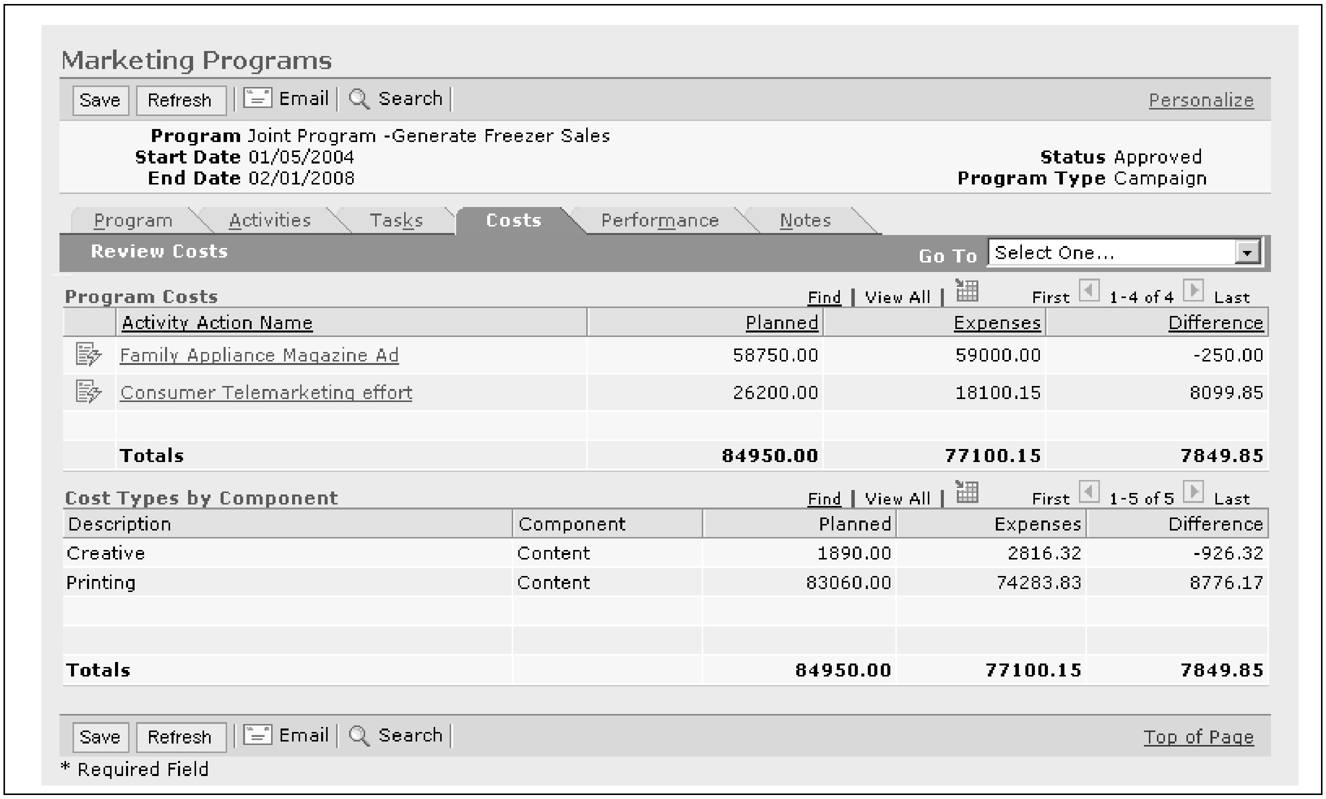
Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 CRM Marketing Applications PeopleBook.*

See Also

PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook, “Creating Campaign Content”

Viewing Cost Information

Access the Marketing Programs — Costs page.



Marketing Programs — Costs page

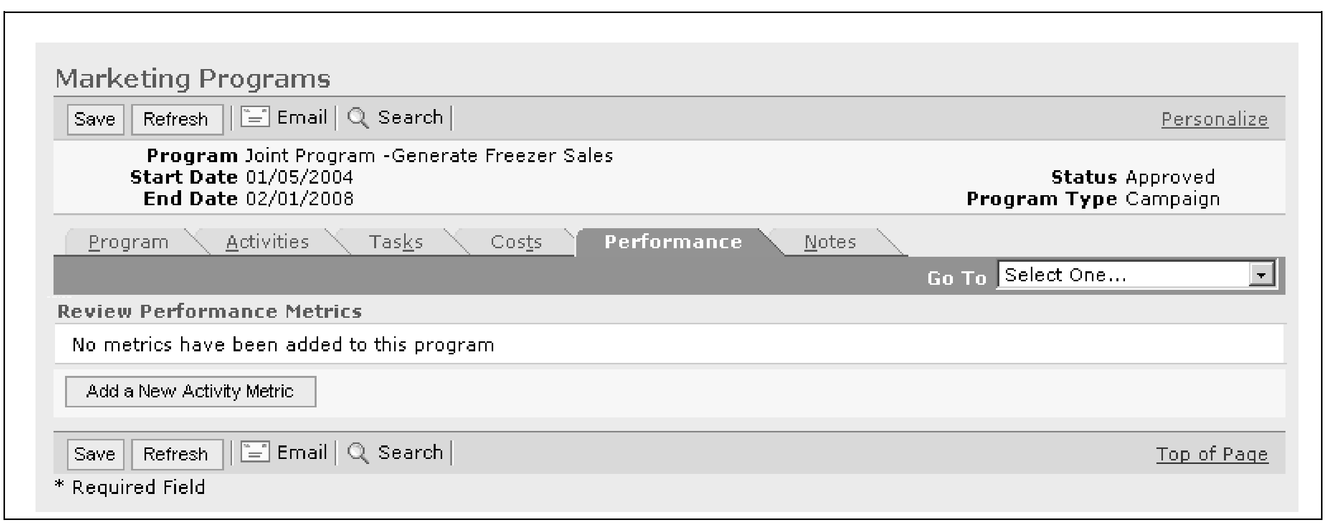
Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 CRM Marketing Applications PeopleBook.*

See Also

PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook, "Creating Campaign Content"

Viewing Performance for Marketing Campaigns

Access the Marketing Programs — Performance page.



Marketing Programs — Performance page

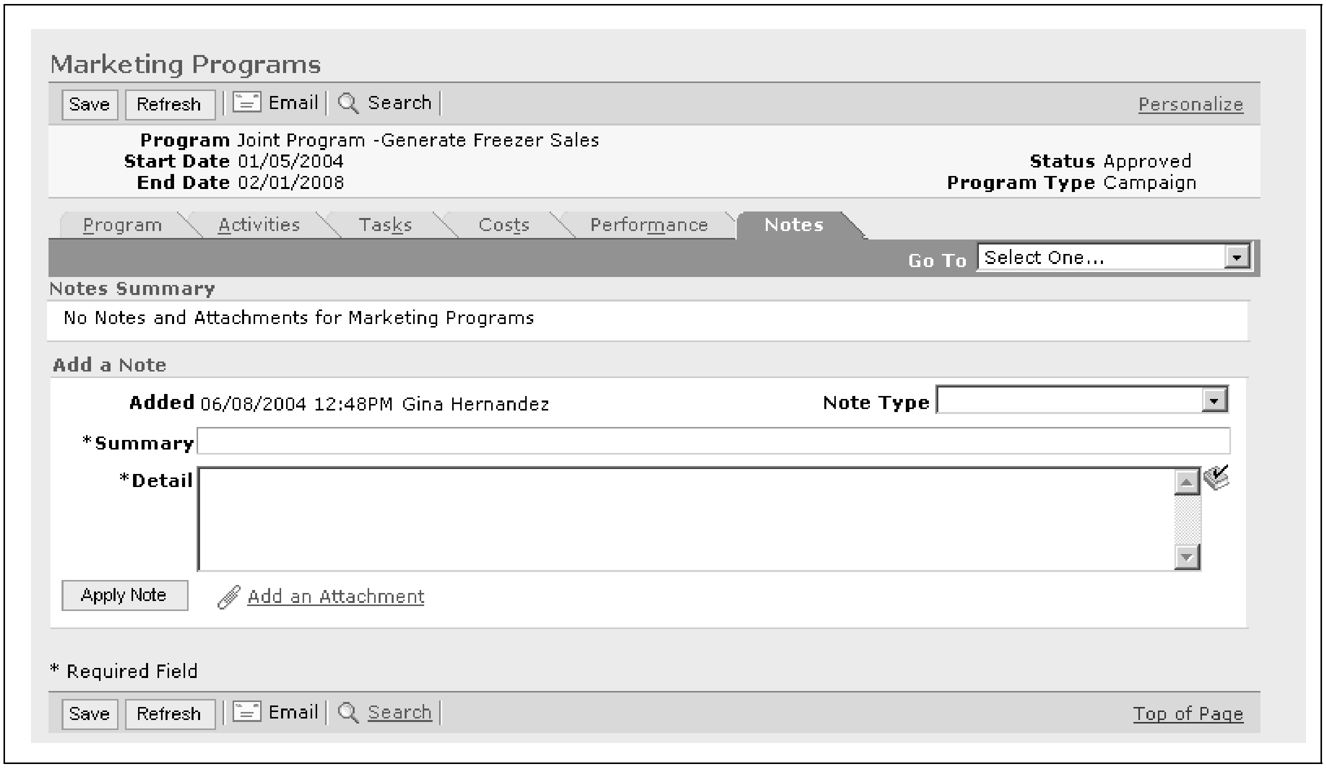
Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 CRM Marketing Applications PeopleBook.*

See Also

PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook, “Creating Campaign Content”

Adding Notes and Attachments to Marketing Campaigns

Access the Marketing Programs — Notes page.



Marketing Programs — Notes page

Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 CRM Marketing Applications PeopleBook.*

See Also

PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook, “Creating Campaign Content”

Generating Partner Leads

This section provides an overview of partner lead functionality and explains how to:

- Generate partner leads.
- Add assignments.
- Add products to the lead.

- Add notes and attachments to the lead.

Understanding Partner Functionality in PeopleSoft Sales

Your enterprise may choose to extend your sales channel to a partner company. In doing so, the partner company and it's partner representatives will therefore need access to the lead component in order to be assigned leads and manage lead information. In order to receive lead assignments, the partner should be represented on the territory tree . The automatic assignment rules will look across the partner and enterprise sales representatives and assign the best representative to the lead. These rules are configured by the enterprise. As soon as a lead has been assigned to a partner company and representative, the lead is viewable within the partner portal. The partner will not have access to the same lead information as the Enterprise user. A partner has access to only those leads that he has been assigned, and has customer access within the lead transaction to only those customers or consumers that he has been granted access to.

Sales representatives and or partner representatives can be added to leads manually or automatically. If they are added automatically, the system does the following:

1. If there is currently an enterprise sales representative that is marked as primary and the assignment engine finds a different primary one, the system will replace the current primary sales representative with the new sales representative.
2. If both the enterprise sales representative and partner representative are marked as primary, the system will replace the primary depending upon who is selected as primary by the Assignment Engine.
3. If there is a enterprise sales representative and partner representative, the system will replace the current primary. For example, if the sales representative is currently the primary and the Assignment Engine sends the partner representative as the primary, the enterprise sales representative is replaced by the partner representative.

Note. Partner sales representatives do not have to be sales users in order to be assigned.

To secure your enterprise, partner restrictions are applied to the PeopleSoft Sales system. When the Enterprise Channel Manager is searching for customers and partners in the context of the lead or opportunity transactions, the following security is enforced:

- Search for a customer and later search for a partner. Partners are restricted to the authorized list of customers.
- Search for a partner and later search for a customer. Customers are restricted to the authorized list of partners.
- Change the Business Unit and search for the customer and partner. The setID should restrict customer and partners.

Note. The system is not delivered with security on the contacts, sites, and partner sales representatives or enterprise sales representatives. Security should prevent the 'Primary' selection in the Sales Team to only those partners authorized for the customer. Security is not enforced if there is no customer or partner identified. For example if the Enterprise Channel Manager searches for a customer without a partner, the entire list of customers will display.

When entering a new lead or opportunity in the Enterprise, if only a partner is involved in the lead, the following is enforced:

- The representative who is entering the lead is defaulted as the primary sales representative.
- A partner with a contact can be selected from the main page. The contact of the partner will be defaulted in the Sales Team as a 'Primary' representative for the partner.

- When adding the partner, you can search for the Partner Reps from all partner companies filtered by setID. You can select multiple contacts from the list for the partner company.
- If partners are added automatically, the partner sales representatives found by the assignment engine will be added to the sales team. If the assignment engine finds the match on the ‘Primary’ sales representative, the partner will be marked as ‘Primary’.

If both an enterprise and partner sales representative are involved:

- An enterprise and a partner sales representative can both be marked as Primary.

Note. If there are more than two sales representatives in the Assign page, changing the Primary enterprise or partner representative will insert a new row or update an existing row for the new primary representative

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- If partners are added automatically and both enterprise and partner sales representatives are already in the ‘Assign’ page and marked as Primary, the assignment engine may find a different primary representative. If so, the existing representatives will not be removed from the sales team, but will be updated as non-primary.

Partner Leads in the PeopleSoft Partner Portal

Lead functionality is exposed in the PeopleSoft Partner Portal and is scaled to fit the partner role. Some of the options available in the Enterprise are not available in the PeopleSoft Partner Portal in order to simplify the user experience and limit the features and functions to only those that the partner should be performing.

The partner can only select from a restricted list of customers. Partners cannot add contacts unless a customer is identified on the lead and only the contacts of the customer can be added.

If the partner is the primary representative:

- The primary partner and partner contact are display only from the Discover page.
- Only the primary partner contact can delete or change the sales team on the lead.
- Only the primary partner contact can change the primary sales team member to a team member from his or her own partner company.
- Any team member viewing the lead can add more team members from his or her own partner company.
- The partner can change the status for the lead.

Note. If the lead is turned back, the system will remove the primary partner from the sales team. A new primary contact from the same partner company as the Partner who is signed in will be added when the page is saved. If none was found, the lead will be given to an enterprise sales representative if there is one, or it will be left unassigned.

If the partner is not the primary representative:

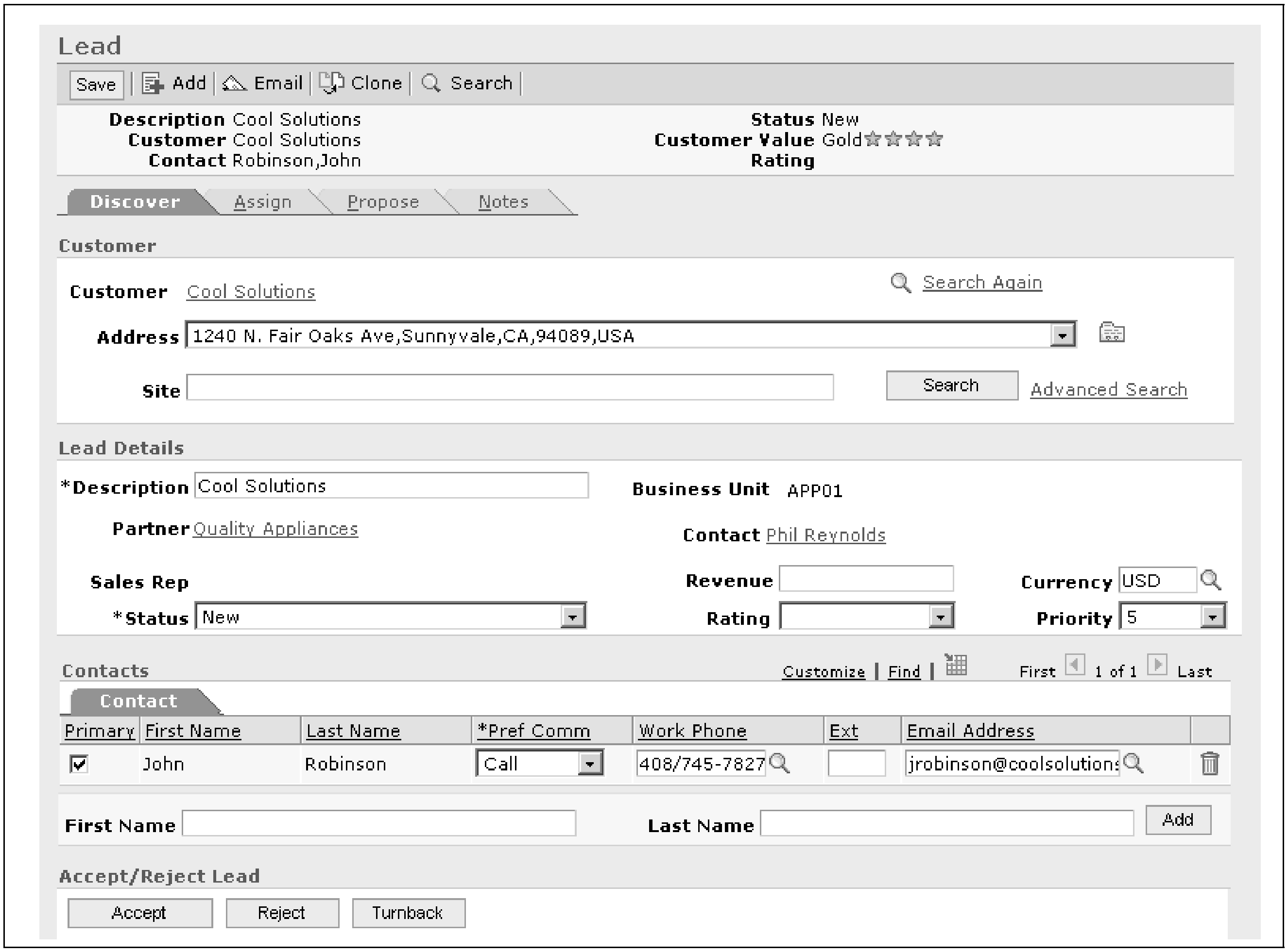
- The partner sales representatives will only be able to view the Discover, Propose and Notes pages.
- The partner sales representatives will still be to add more team members from their own partner company.

Page Used to Generate Partner Leads

Page Name	Object Name	Navigation	Usage
Search Leads	RSF_LEADS_HOME_GRD	Partner Portal, Search Leads	Use to search for leads.
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.
Lead - Assign	RSF_LEAD_ASSIGN	Sales Portal, Add Lead Select the Assign tab on the Lead — Discover page.	Assign the sales representative to the lead.
Lead - Propose	RSF_LEAD_PROPOSE	Select the Propose tab on the Lead — Discover page.	Select products and prices for the proposal for the lead.
Lead — Notes	RSF_LEAD_NOTES	Select the Notes tab on the Lead — Discover page.	Enter notes and attachments about the lead.

Generating Partner Leads

Access the Lead — Discover page.



Lead — Discover page

A partner representative can create brand new leads or be assigned existing leads created by the enterprise.

Note. The display template configuration is set to display the partner information in the Lead Details section. The display template can be configured to add a new section for the partner data.

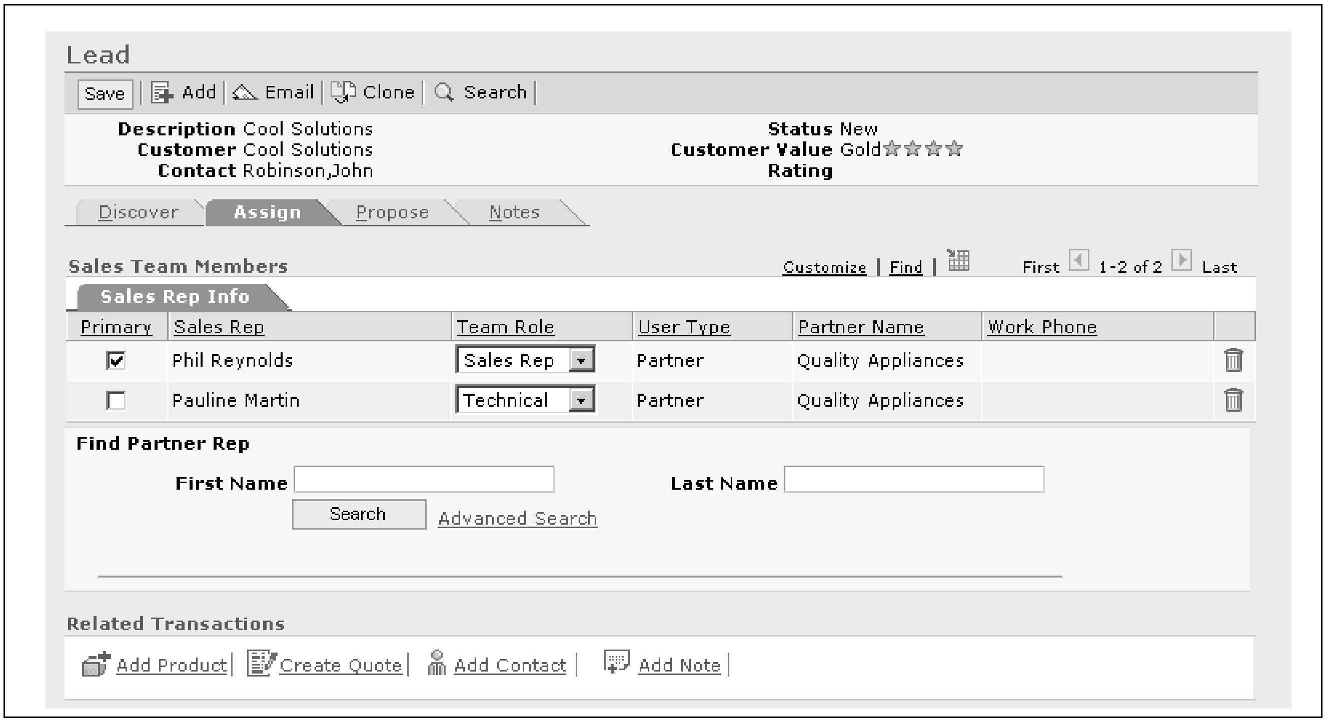
An explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Sales PeopleBook.*

See Also

PeopleSoft Enterprise Sales 8.9 PeopleBook, “Creating Sales Leads and Opportunities”

Adding Assignments

Access the Lead — Assign page



Lead — Assign page

On the assignment tab, the partner can assign additional partner reps and remove non-primary partner representatives.

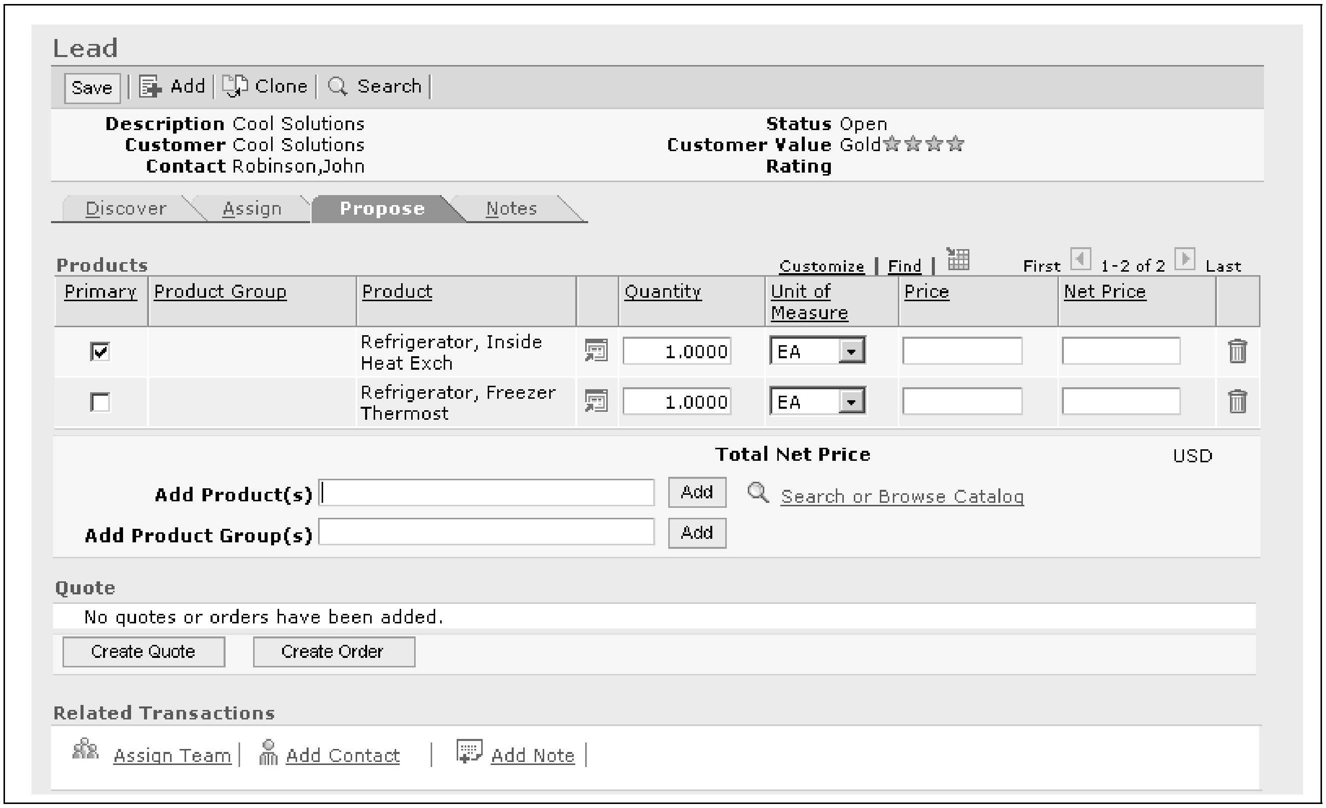
Additional explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Sales PeopleBook.*

See Also

PeopleSoft Enterprise Sales 8.9 PeopleBook, “Creating Sales Leads and Opportunities”

Adding Products to the Lead

Access the Lead — Propose page.



Access the Lead — Propose page

The partner rep has the ability to assign or remove products from the lead, and convert a lead to a quote or an order.

Additional explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Sales PeopleBook.*

See Also

PeopleSoft Enterprise Sales 8.9 PeopleBook, "Creating a Proposal for a Lead or Opportunity," Selecting Products and Prices for the Proposal

Adding Notes and Attachments to the Lead

Access the Lead — Notes page.

Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Sales PeopleBook.*

See Also

PeopleSoft Enterprise Sales 8.9 PeopleBook, "Creating Sales Tasks and Adding Notes for a Lead or Opportunity," Adding Notes and Attachments

Adding Orders and Quotes by Partners

This section provides an overview about partner orders and quotes and explains how a partner can:

- Enter orders.
- Access product recommendations.

- Check availability and price.
- Enter line details.
- View and remove holds.
- View notes.
- View related actions.
- View order history.

Orders and Quotes

Many of the options and pages available to the partner when entering an order from the PeopleSoft Partner Portal are the same as when an order is entered by a CSR during order entry. The differences are listed in this section.

When a partner enters an order or quote, they can only select from customers and products that they have been given access using the CRM application security framework.

Depending on how you set up hold processing, partners may be able to release some orders from hold status to expedite fulfillment.

Hold codes pertaining to partners are available to use in the following situations:

- The partner is placing an order for a product that exists in his catalog but not in the customer's catalog
- Minimum or maximum order total amounts for a specific partner. When the order is outside of these limits, the order is placed on hold.
- If the partner is allowed to apply a manual price adjustment, the order will go on hold if the manual discount or surcharge is greater than what the partner is allowed to give.
- If the partner name is specified but the partner contact field is empty, the order will go on hold.
- If configured products are added to the order, the order will go on hold.
- If the partner places an order for resale, the tax-exempt certificate should be included or the order will go on hold.

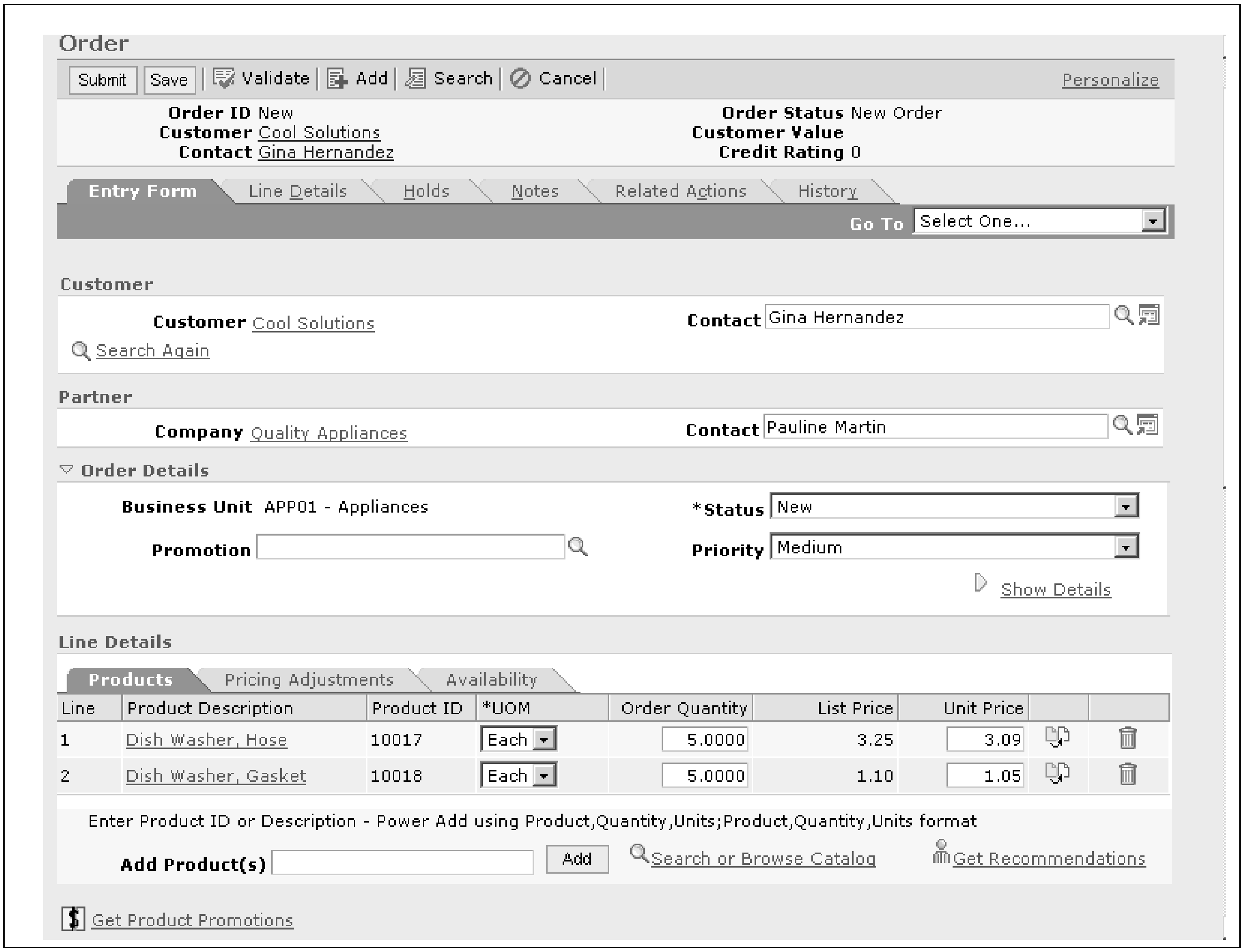
All of the hold codes can be edited or deleted. For example, you may decided that configured products that are ordered by partners do not need to be reviewed before the hold code is removed.

Pages Used to Enter Orders and Quotes by Partners

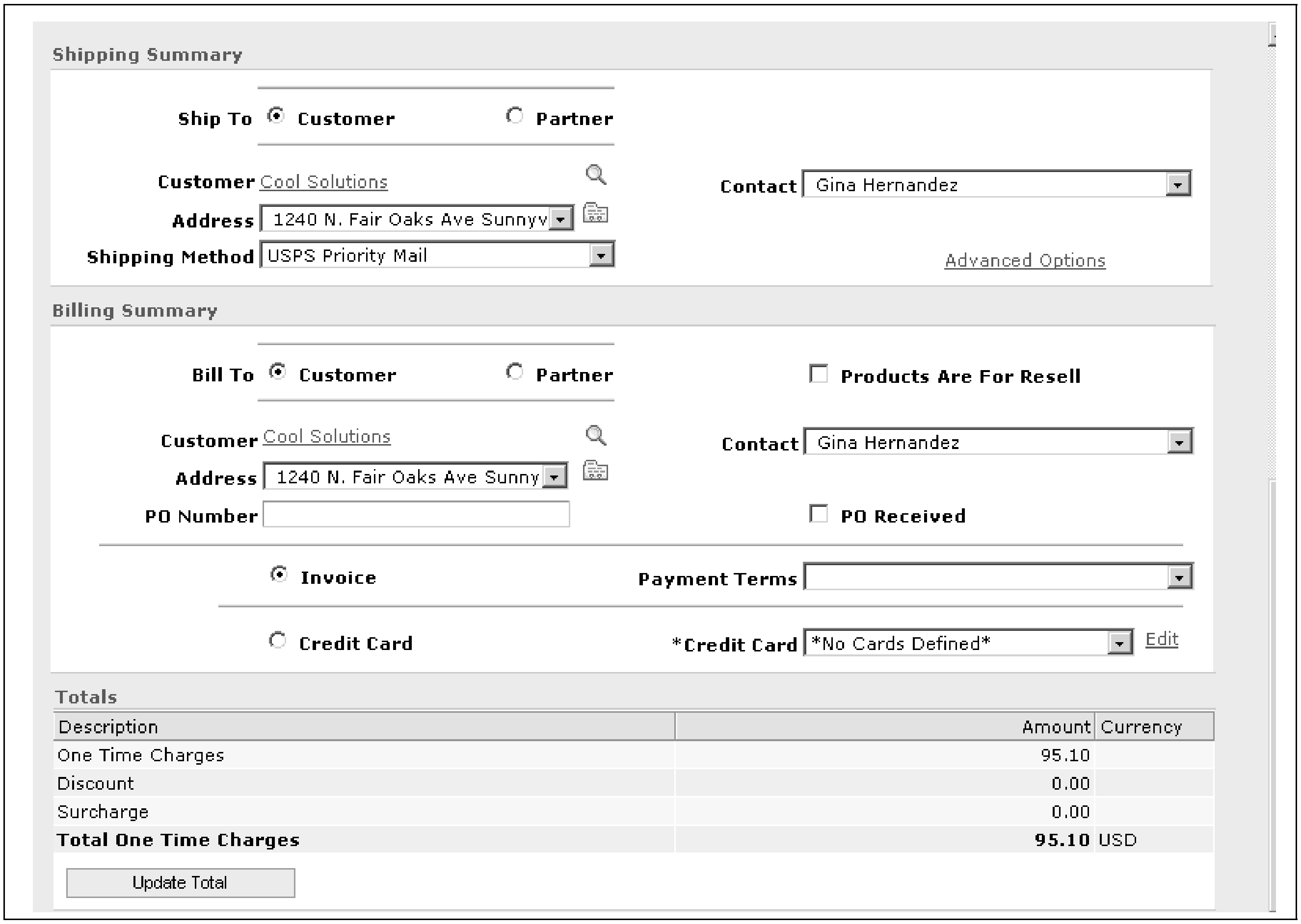
Page Name	Object Name	Navigation	Usage
Search	RO_SEARCH_UPDATE	Partner Portal, Search Orders and Quotes	Search for orders and quotes.
Order — Entry Form, Quote — Entry Form,	RO_FORM	• Partner Portal, Add Order • Partner Portal, Add Quote	As a partner, enter an order or quote for a customer.
Product Advisor List	RO_LISTDISP_SEC	Click the Get Recommendations link on the Quote - Entry Form or Order - Entry Form page.	Select a catalog from the list of catalogs available. You can then launch Advisor dialogs that are associated to the catalog.
Check Availability and Pricing	RO_FORM	Click the Availability tab on the Quote - Entry Form or Order - Entry Form page. Then click the Check Availability link.	Create partial shipments, add promotion codes, or view pricing details for order lines.
Line Details	RO_CAPTURELINE_DTL	Click the Line Details tab in the Order Details or Quote Details section on the Quote - Entry Form or Order - Entry Form page.	Check product availability. Partners can edit line details such as unit of measure, order quantity, unit price, promotion code and apply manual adjustments. They can also allow partial shipment for this product.
Entry Form — Holds	RO_HOLD	Click the Holds tab in the Order Details or Quote Details section on the Quote - Entry Form or Order - Entry Form page.	Use to view and remove holds for the order.
Notes	RO_NOTE	Click the Notes tab in the Order Details or Quote Details section on the Quote - Entry Form or Order - Entry Form page.	Use to view or add notes to the order.
Related Actions	RO_ASSOCIATION	Click the Related Action tab in the Order Details or Quote Details section on the Quote - Entry Form or Order - Entry Form page.	View related actions for the order, such as a business project that is somehow related to the order or quote.
History	RO_HISTORY	Click the History tab in the Order Details or Quote Details section on the Quote - Entry Form or Order - Entry Form page.	View changes or communication about the order.

Entering Orders

Access the Order — Entry Form page.



Order — Entry Form page (1 of 2)



Order — Entry Form page (2 of 2)

Customer	The customers that the partner can order for are displayed and can be selected.
Partner	The name defaults based on the security of the partner logging into the system.
Customer and **Partner**	Select whether to ship or bill to the customer or partner.

The partner fields can be displayed in the partner section as seen above or within the order/quote details section. Using the display template, the partner fields can be configured as appropriate for you business

Additional explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Order Capture Applications PeopleBook.*

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, “Managing Orders and Quotes,” Creating Orders or Quotes

Accessing Product Recommendations

Access the Product Advisor List page.

Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Order Capture Applications PeopleBook.*

See Also

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

Checking Availability and Pricing

Access the Check Availability and Pricing page.

Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Order Capture Applications PeopleBook.*

See Also

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

Entering Line Details

Access the Line Details page.

Configure	Click the button to launch the product PeopleSoft Sales Configurator.
Attributes	Click the button to add configurable product attributes to an order or quote line. Always specify the attribute value for products with required attributes.
Apply Adjustment	Depending on how you set up the partner, they may be restricted from applying manual adjustments.

Additional explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Order Capture Applications PeopleBook.*

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, “Managing Orders and Quotes,” Creating Configurations

Viewing and Removing Holds

Access the Holds page.

Hold	Displays the type of hold.
Hold Status	The current status of the hold and the holds that the partner can respond to are displayed. Available options include: *Requires Action:* The system defaults to this status when the hold is created. *In Progress:* Used to note that some action is taking place in relation to the hold. *Override Hold:* Used to pass the order to fulfillment without resolving the hold. *Resolved:* Use when the hold has been fixed. *Passed:* The system sets this status when the hold has been fixed. *Override Declined:* The Enterprise CSR can select this option to decline a hold for an order that was placed by a partner.
Pending Action By	Displays the roles that can correct the hold.

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, “Managing Orders and Quotes,” Managing Holds

Viewing Notes

Access the Entry Form — Notes page.

Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Order Capture Applications PeopleBook.*

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, “Managing Orders and Quotes,” Adding and Viewing Notes and Attachments

Viewing Related Actions

Access the Entry Form — Related Actions page.

Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Order Capture Applications PeopleBook.*

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, “Managing Orders and Quotes,” Viewing Related Actions

Viewing Order History

Access the Entry Form — History page.

Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Order Capture Applications PeopleBook.*

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, “Managing Orders and Quotes,” Viewing History

Maintaining Service Management Orders by Partners

This section provides an overview of partner management service orders and explains how a partner can:

- Add partner service management orders.
- Add service management order line details.
- View and remove holds.
- View notes.
- View related actions.

• View order history.

Partner Service Management Orders

Similar to the order entry discussed in the previous section, many of the options and pages available to the partner when entering a service order from the PeopleSoft Partner Portal are the same as when a service order is entered by a CSR The differences are listed in this section.

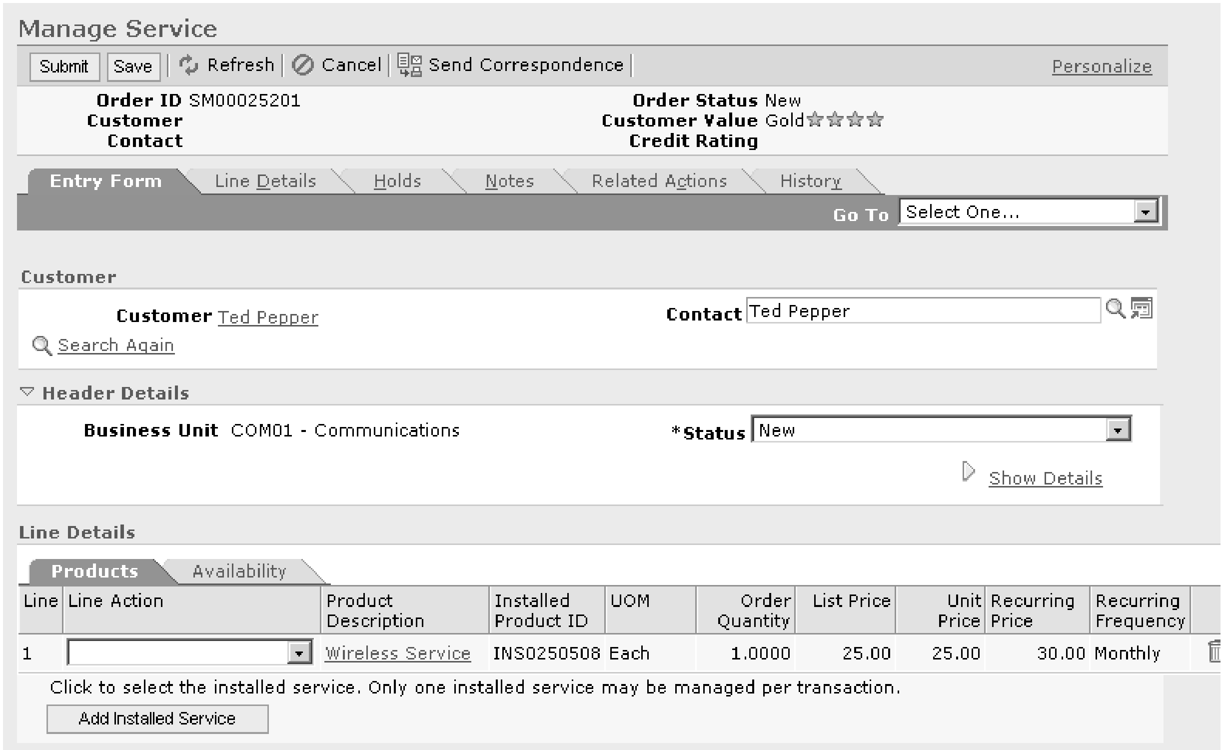
When partners log on to the PeopleSoft Partner Portal to maintain service orders, their partner and contact information is saved on the service order, but it is not displayed while they enter the order. The list of installed services that can be added to the service order are based on the partner and customer relationship.

Pages Used to Add Partner Service Management Orders

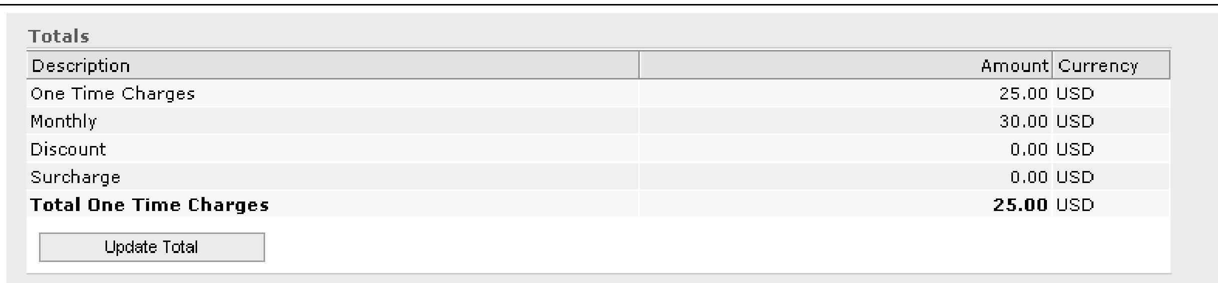
Page Name	Object Name	Navigation	Usage
Search	RO_SEARCH_UPDATE	Partner Portal, Search Orders and Quotes	Search for service orders.
Manage Service — Entry Form	RO_FORM	Partner Portal, Maintain Service	Use to manage customer service requests.
Manage Service — Line Details	RO_CAPTURELINE_DTL	Click the Line Details tab in the Entry Form section of the Manage Service — Entry Form page.	Use to view line details for the order.
Entry Form — Holds	RO_HOLD	Click the Holds tab in the Entry Form section of the Manage Service — Entry Form page.	Use to view and remove holds for the order.
Notes	RO_NOTE	Click the Notes tab in the Entry Form section of the Manage Service — Entry Form page.	Use to view or add notes to the order.
Related Actions	RO_ASSOCIATION	Click the Related Action tab in the Entry Form section of the Manage Service — Entry Form page.	View related actions for the order, such as a business project that is somehow related to the order or quote.
History	RO_HISTORY	Click the History tab in the Entry Form section of the Manage Service — Entry Form page.	View changes or communication about the order.

Adding Partner Service Management Orders

Access the Manage Service — Entry Form page.



Manage Service — Entry Form page (1 of 2)



Manage Service — Entry Form page (2 of 2)

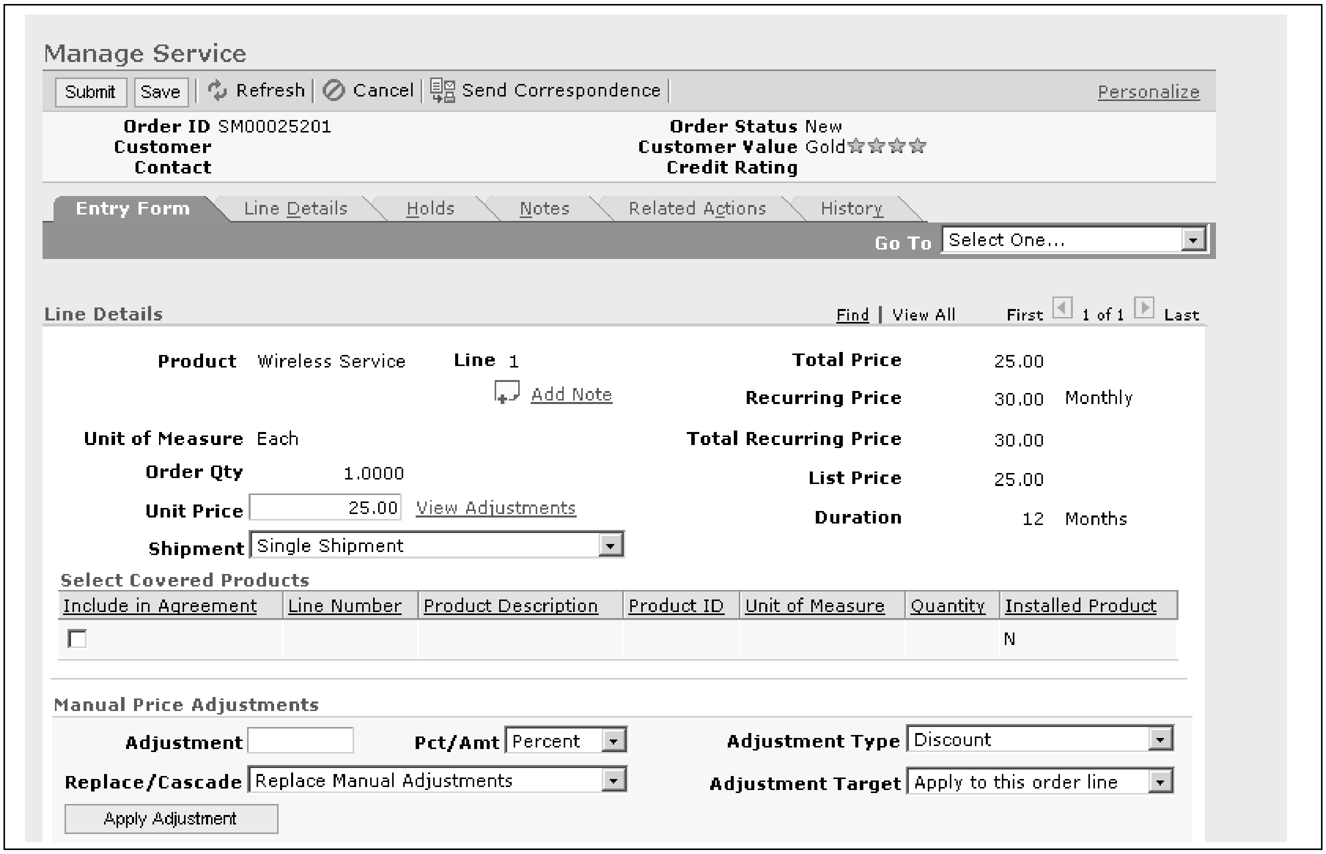
Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Order Capture Applications PeopleBook.*

See Also

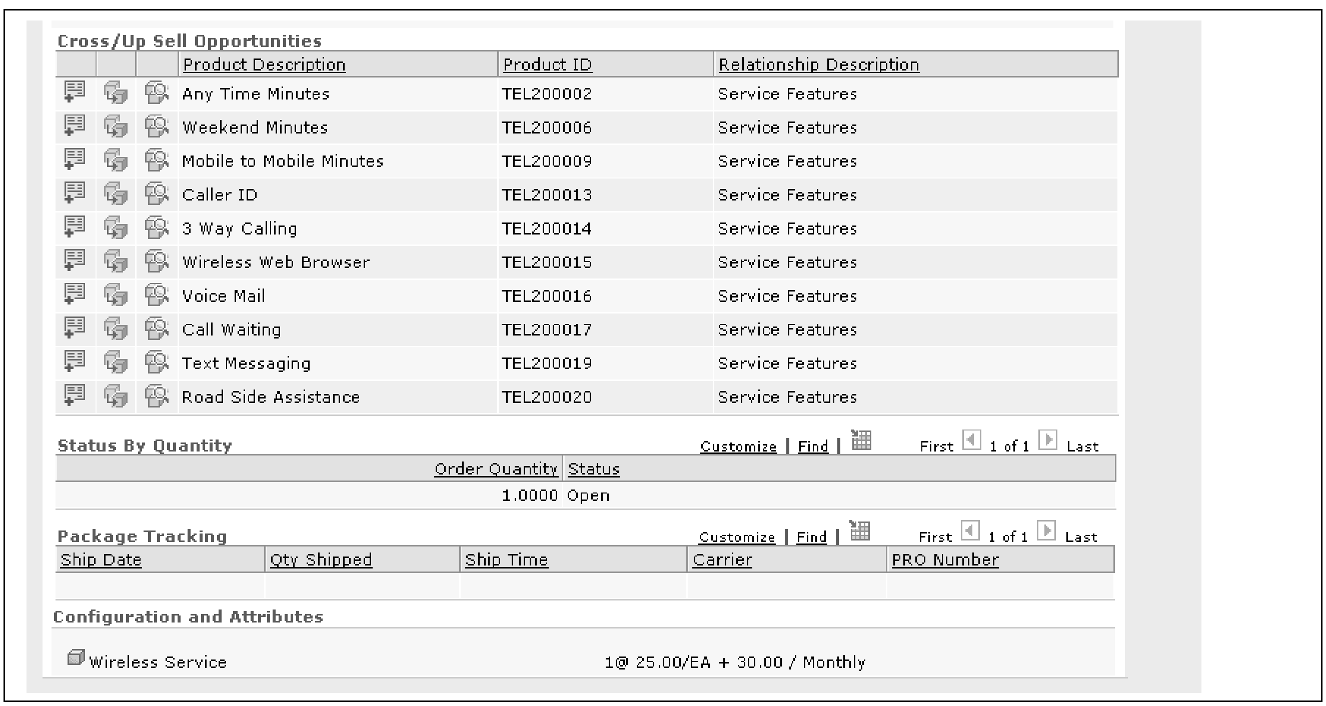
PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management"

Adding Service Management Order Line Details

Access the Manage Service — Line Details page.



Manage Service — Line Details page (1 of 2)



Manage Service — Line Details page (2 of 2)

Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Order Capture Applications PeopleBook.*

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management," Working with Service Management

Viewing and Removing Holds

Access the Holds page.

Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Order Capture Applications PeopleBook.*

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management," Working with Service Management

Viewing Notes

Access the Entry Form — Notes page.

Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Order Capture Applications PeopleBook.*

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management," Working with Service Management

Viewing Related Actions

Access the Entry Form — Related Actions page.

Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Order Capture Applications PeopleBook.*

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management," Working with Service Management

Viewing Order History

Access the Entry Form — History page.

Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Order Capture Applications PeopleBook.*

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management," Working with Service Management

Viewing Financial Information

This section provides an overview of the financial account transaction, and explains how partners can view customer information regarding:

- Financial accounts.
- ATM cards.
- Terms and conditions.
- Fees.
- Claims.
- Address History.

Customer Financial Information

In the PeopleSoft Partner Portal, partners can view financial account information for the customers that they represent. The financial account information is provided to PeopleSoft customers that are in the financial industry. The partner name and company are displayed on the main page of the component.

See Also

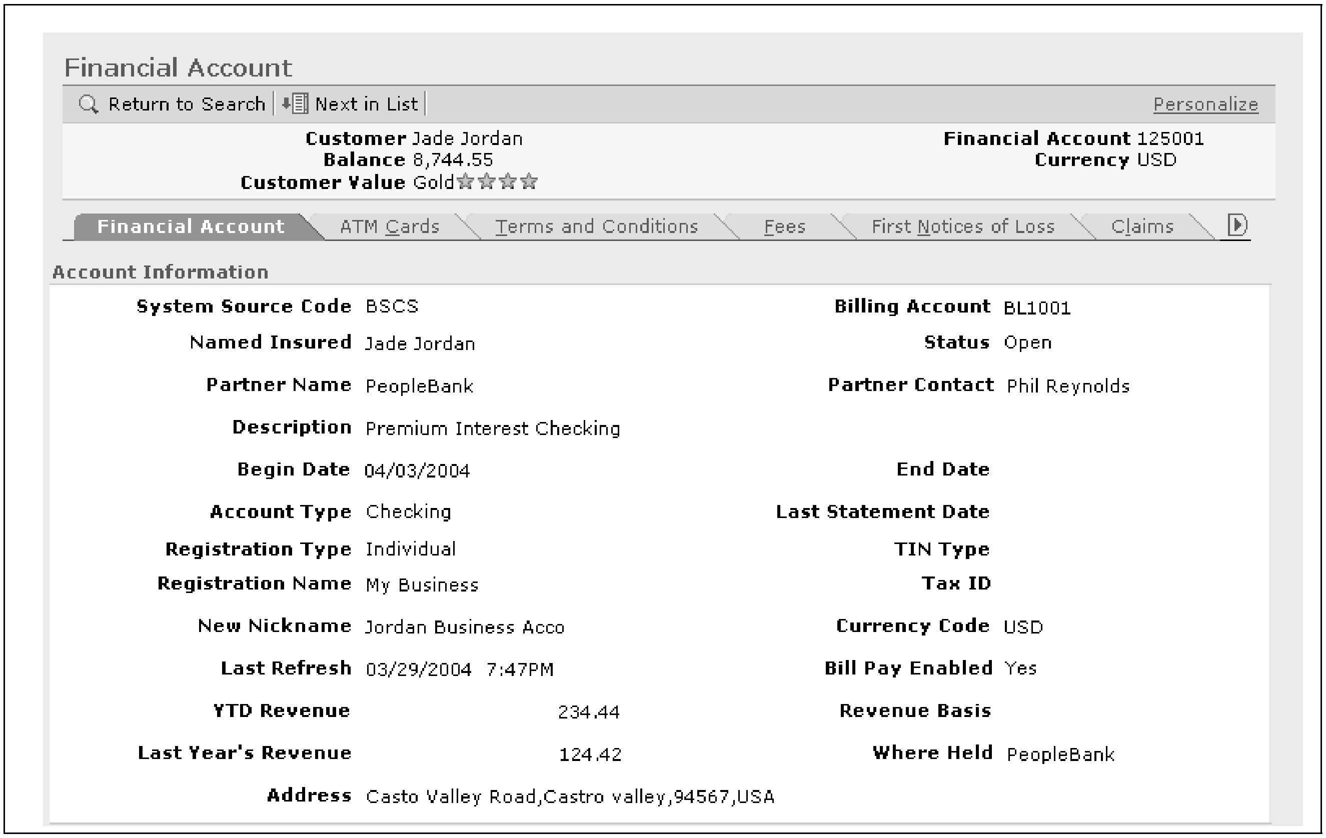
PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook

Pages Used to View Customer Financial Information by Partners

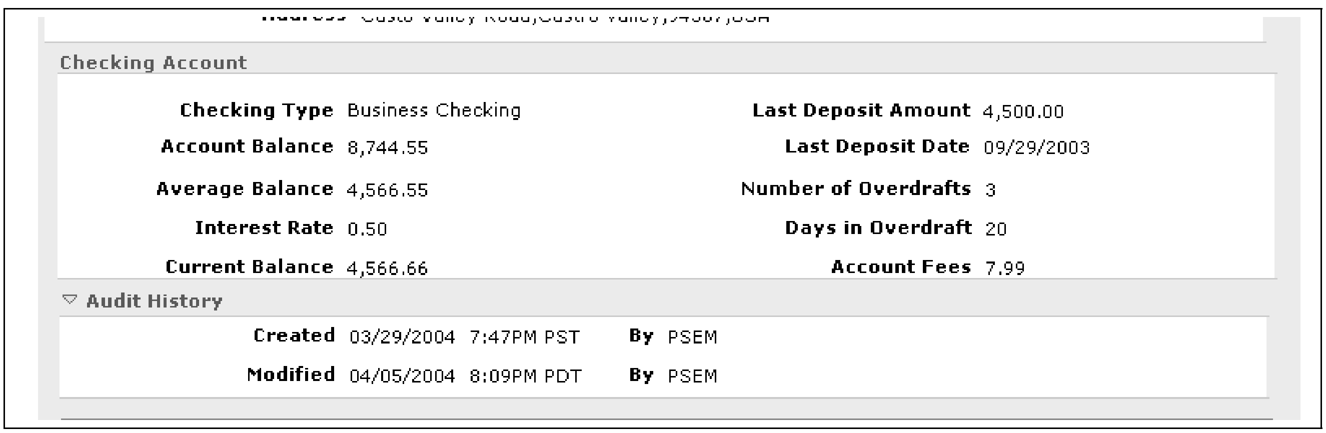
Page Name	Object Name	Navigation	Usage
Financial Account	RBF_FIN_ACCOUNT	Partner Portal, Review Financial Account	Use to view financial account information for customers that partners are associated with.
ATM Cards	RBF_ACCT_ATM_CARDS	Partner Portal, Review Financial Account	Use to review ATM cards.
Terms and Conditions	RBF_ACCT_ATTR	Partner Portal, Review Financial Account	Use to view the terms and conditions that are associated with the account.
Fees	RBF_FINACCT_FEES	Partner Portal, Review Financial Account	Use to view all account fees that are associated with the account.
Claims	RBF_FINACCT_CLAIMS	Partner Portal, Claims	Use to view claim information
Address History	RBF_ACTADR_HIST	Partner Portal, Review Financial Account	Use to view the address history that is associated with the account.

Viewing Financial Account Information

Access the Financial Account Information page.



Financial Account page (1 of 2)



Financial Account page (2 of 2)

The partner name and partner contact fields are displayed within the account information section. Partners can view only the customer account information that they have been secured to view. For additional field explanations reference *PeopleSoft Enterprise 8.9 Banking Transactions PeopleBook.*

See Also

PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook, “Setting Up Internet Banking”

Viewing ATM Card Information

Access the ATM Card page.

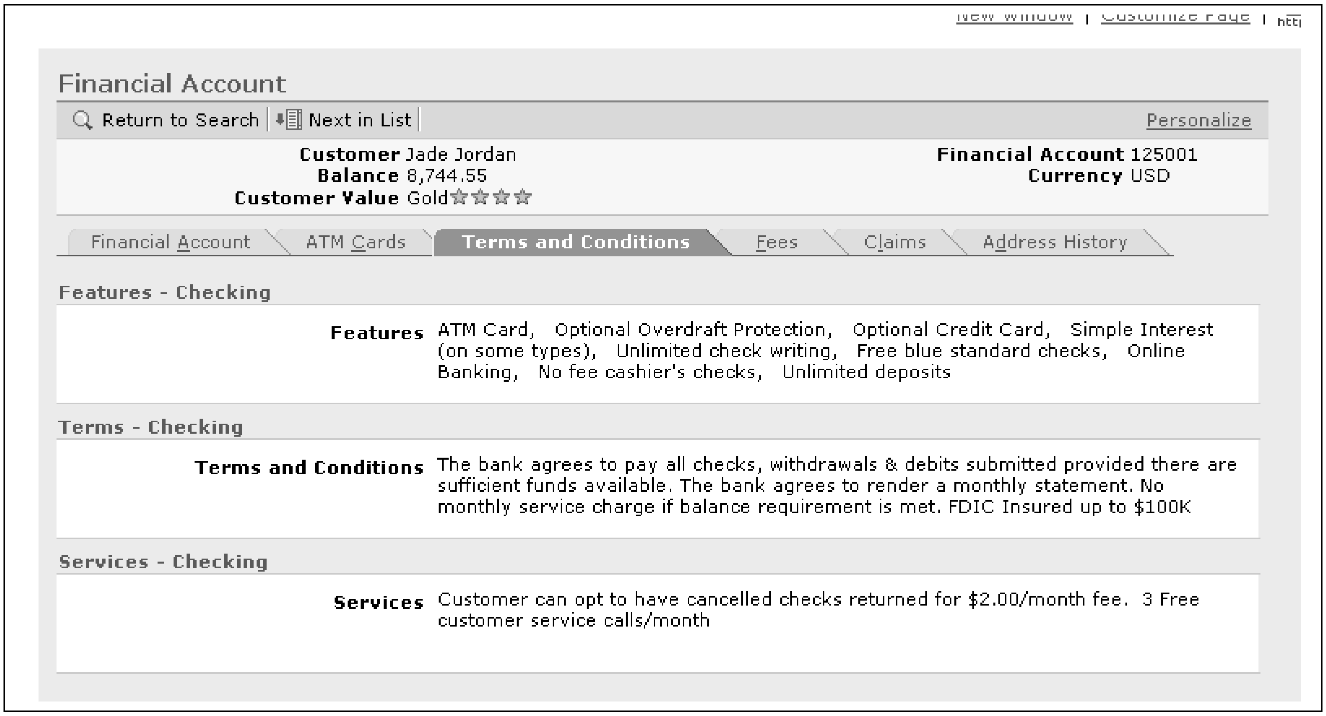
Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Banking Transactions PeopleBook.*

See Also

PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook, “Working with Agent Facing Banking Transactions,” Managing ATM Card Details

Viewing Terms and Conditions

Access the Terms and Conditions page.



Terms and Conditions page

Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Banking Transactions PeopleBook.*

Viewing Fee Information

Access the Fee page.

Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Banking Transactions PeopleBook.*

Viewing Claims Information

Access the Claims page.

Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Policy and Claims Presentment PeopleBook.*

See Also

PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook, “Working with Claims,” Viewing Claims

Viewing Address History

Access the Address History page.

Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Banking Transactions PeopleBook.*

Adding Partners to Support Cases

This section provides an overview of how partners are added to cases.

Partner Cases

You can now capture partner information when logging a case either in customer self-service, or within the enterprise or employee case transaction. The partner company and partner contact can be added to the case.

You can display the partner company and partner contact in the Case Information section of the main case page or in the Partner Information section on the main case page by configuring the display template. The partner fields can be displayed in two sections of the main case page, so you should select the location that makes sense for your business needs.

When adding a case, security performs the following:

- When a partner is selected, the customer selection must be limited to those customers who are in the view list for that partner.
- When a customer is selected, the partner selection must be limited to those partners who are in the membership list that grants access to that customer.

See Also

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

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

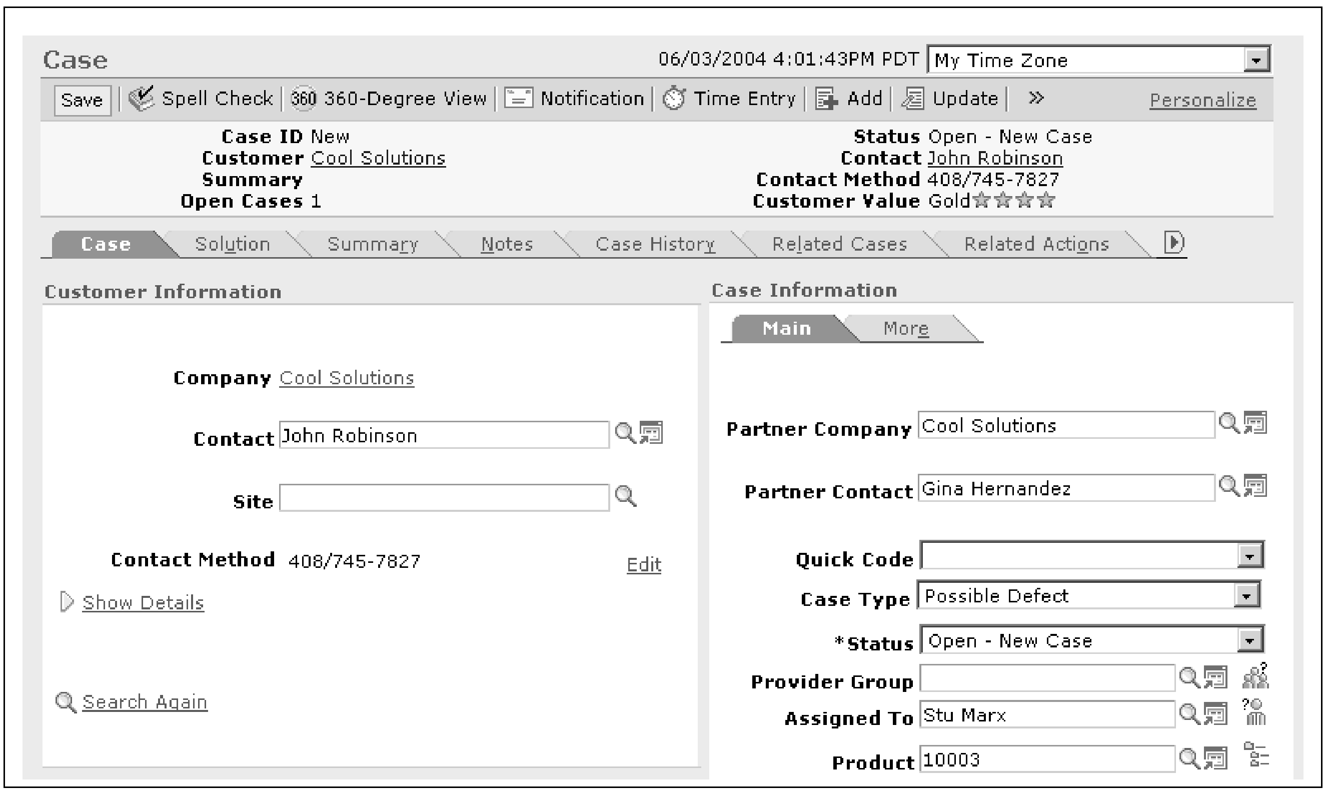
PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Configuring Display Templates”

Adding Partner Information to a Case

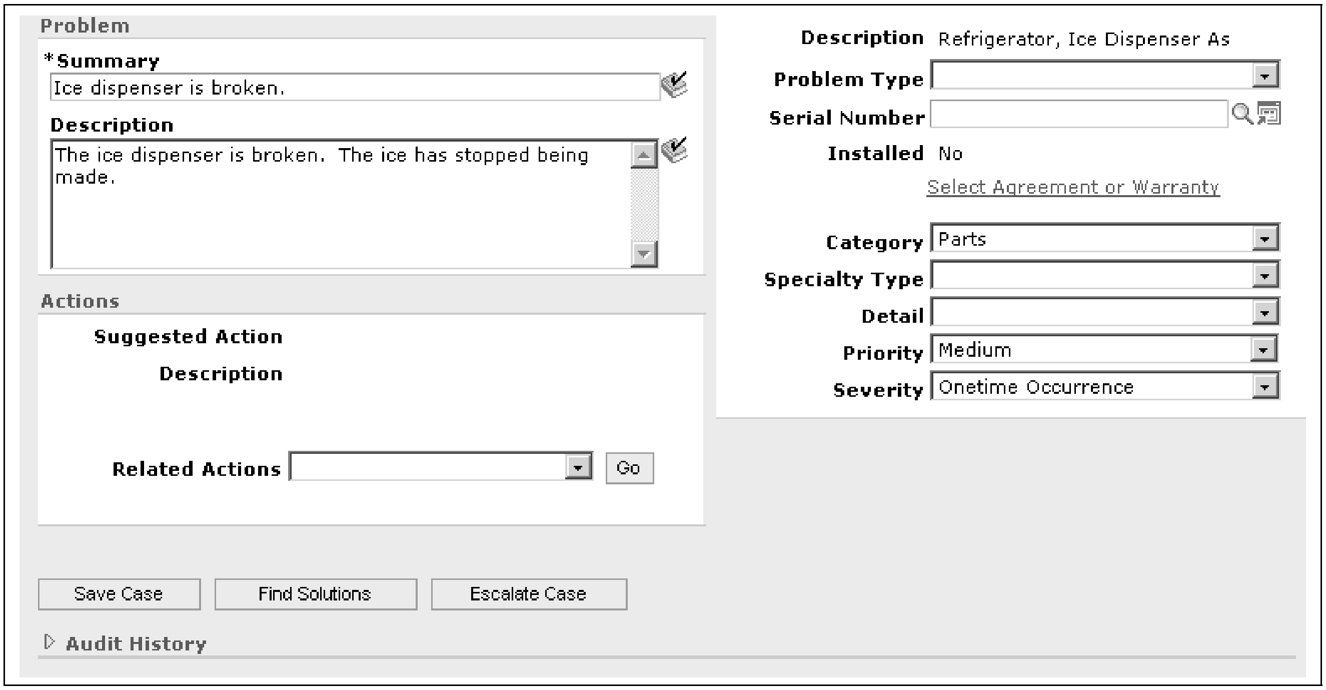
Page Name	Object Name	Navigation	Usage
Support Case	RC_CASE	• Support, Create a Case, Case • Support, Search Cases, Case	Add and manage PeopleSoft Support cases. Use this page to perform case management tasks such as reviewing identifying information, performing toolbar functions, tracking customer information, entering problem details, verifying customer entitlements, assigning as well as resolving cases.
Create Case	RC_CASE_SW_SS_RPT	Customer Portal, Customer Care, Create Case	Use to add partner information to self-service cases.

Adding Partners to Cases

Access the Case page.



Case page (1 of 2)



Case page (2 of 2)

The Partner fields are in the Case Information section in this screenshot and they can also be in their own Partner Information section which is not enabled in the screenshot. The display template associated with the case can be configured to use the partner section or the case information section.

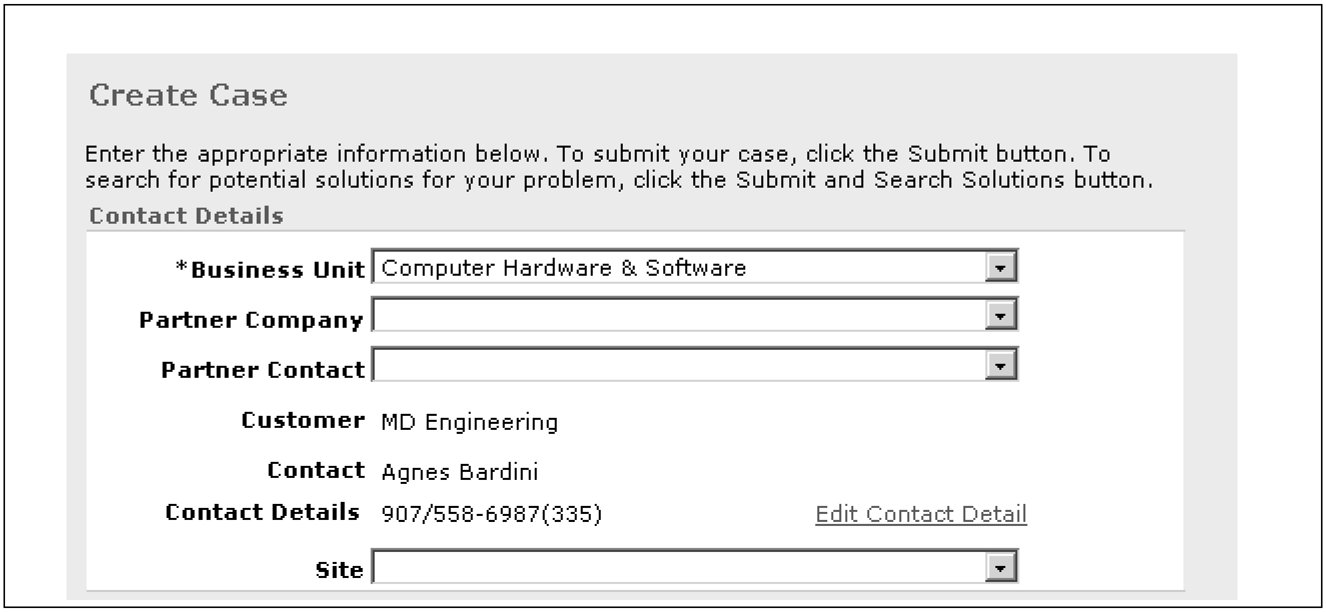
Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Call Center Applications PeopleBook.*

See Also

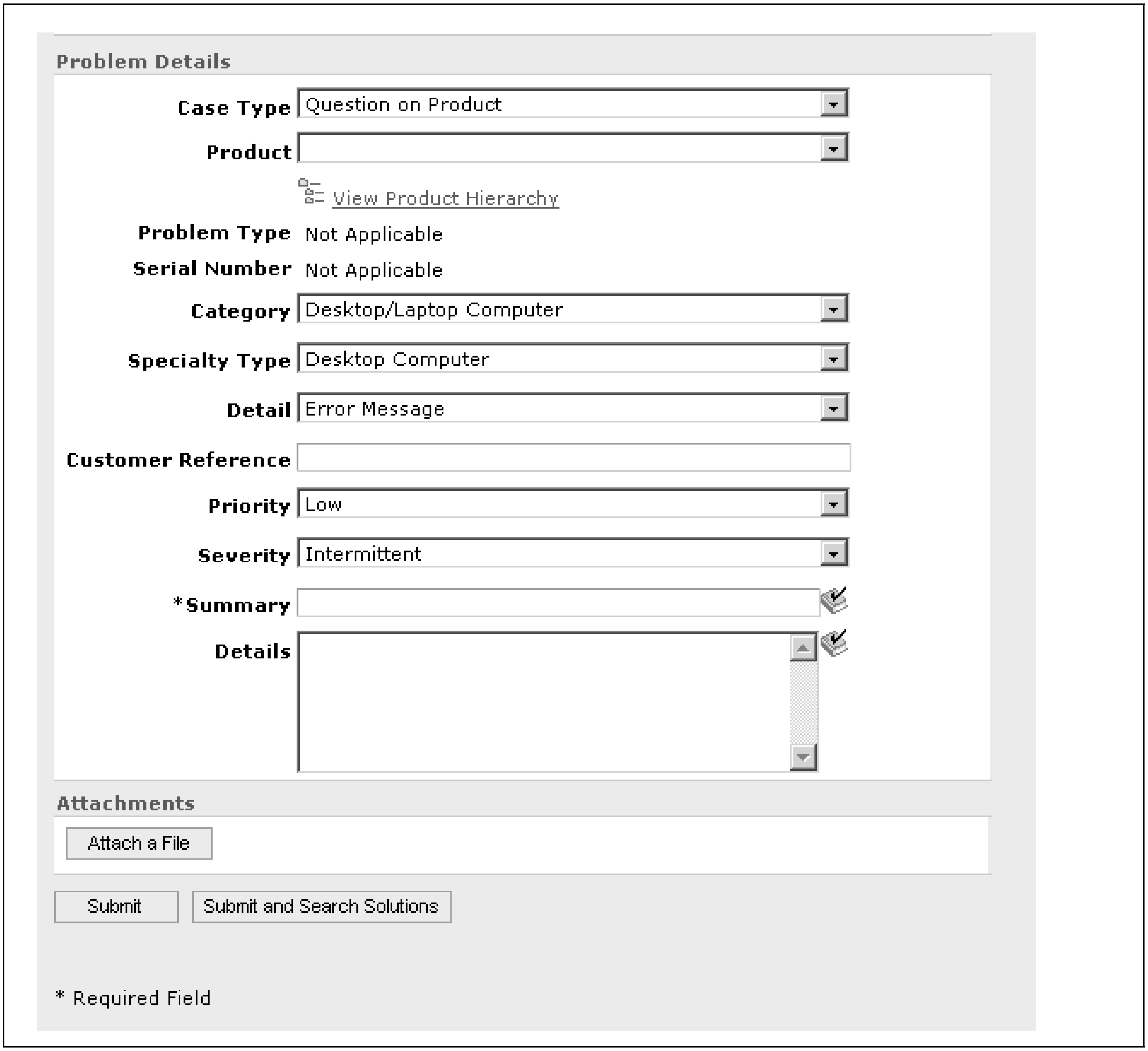
PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “Managing Cases”

Adding Partners to Self-Service Cases

Access the Create Case page.



Create Case page (1 of 2)



Create Case page (1 of 2)

Explanations of these fields are provided in the *PeopleSoft Enterprise 8.9 Call Center Applications PeopleBook.*

See Also

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

APPENDIX A

ISO Country and Currency Codes

PeopleBooks use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

This appendix discusses:

- ISO country codes.
- ISO currency codes.

See Also

"About This PeopleBook," Typographical Conventions and Visual Cues

ISO Country Codes

This table lists the ISO country codes that may appear as country identifiers in PeopleBooks:

ISO Country Code	Country Name
ABW	Aruba
AFG	Afghanistan
AGO	Angola
AIA	Anguilla
ALB	Albania
AND	Andorra
ANT	Netherlands Antilles
ARE	United Arab Emirates
ARG	Argentina
ARM	Armenia
ASM	American Samoa
ATA	Antarctica

ISO Country Code	Country Name
ATF	French Southern Territories
ATG	Antigua and Barbuda
AUS	Australia
AUT	Austria
AZE	Azerbaijan
BDI	Burundi
BEL	Belgium
BEN	Benin
BFA	Burkina Faso
BGD	Bangladesh
BGR	Bulgaria
BHR	Bahrain
BHS	Bahamas
BIH	Bosnia and Herzegovina
BLR	Belarus
BLZ	Belize
BMU	Bermuda
BOL	Bolivia
BRA	Brazil
BRB	Barbados
BRN	Brunei Darussalam
BTN	Bhutan
BVT	Bouvet Island
BWA	Botswana
CAF	Central African Republic
CAN	Canada
CCK	Cocos (Keeling) Islands

ISO Country Code	Country Name
CHE	Switzerland
CHL	Chile
CHN	China
CIV	Cote D'Ivoire
CMR	Cameroon
COD	Congo, The Democratic Republic
COG	Congo
COK	Cook Islands
COL	Colombia
COM	Comoros
CPV	Cape Verde
CRI	Costa Rica
CUB	Cuba
CXR	Christmas Island
CYM	Cayman Islands
CYP	Cyprus
CZE	Czech Republic
DEU	Germany
DJI	Djibouti
DMA	Dominica
DNK	Denmark
DOM	Dominican Republic
DZA	Algeria
ECU	Ecuador
EGY	Egypt
ERI	Eritrea
ESH	Western Sahara

ISO Country Code	Country Name
ESP	Spain
EST	Estonia
ETH	Ethiopia
FIN	Finland
FJI	Fiji
FLK	Falkland Islands (Malvinas)
FRA	France
FRO	Faroe Islands
FSM	Micronesia, Federated States
GAB	Gabon
GBR	United Kingdom
GEO	Georgia
GHA	Ghana
GIB	Gibraltar
GIN	Guinea
GLP	Guadeloupe
GMB	Gambia
GNB	Guinea-Bissau
GNQ	Equatorial Guinea
GRC	Greece
GRD	Grenada
GRL	Greenland
GTM	Guatemala
GUF	French Guiana
GUM	Guam
GUY	Guyana
GXA	GXA - GP Core Country

ISO Country Code	Country Name
GXB	GXB - GP Core Country
GXC	GXC - GP Core Country
GXD	GXD - GP Core Country
HKG	Hong Kong
HMD	Heard and McDonald Islands
HND	Honduras
HRV	Croatia
HTI	Haiti
HUN	Hungary
IDN	Indonesia
IND	India
IOT	British Indian Ocean Territory
IRL	Ireland
IRN	Iran (Islamic Republic Of)
IRQ	Iraq
ISL	Iceland
ISR	Israel
ITA	Italy
JAM	Jamaica
JOR	Jordan
JPN	Japan
KAZ	Kazakstan
KEN	Kenya
KGZ	Kyrgyzstan
KHM	Cambodia
KIR	Kiribati
KNA	Saint Kitts and Nevis

ISO Country Code	Country Name
KOR	Korea, Republic of
KWT	Kuwait
LAO	Lao People's Democratic Rep
LBN	Lebanon
LBR	Liberia
LBY	Libyan Arab Jamahiriya
LCA	Saint Lucia
LIE	Liechtenstein
LKA	Sri Lanka
LSO	Lesotho
LTU	Lithuania
LUX	Luxembourg
LVA	Latvia
MAC	Macao
MAR	Morocco
MCO	Monaco
MDA	Moldova, Republic of
MDG	Madagascar
MDV	Maldives
MEX	Mexico
MHL	Marshall Islands
MKD	Fmr Yugoslav Rep of Macedonia
MLI	Mali
MLT	Malta
MMR	Myanmar
MNG	Mongolia
MNP	Northern Mariana Islands

ISO Country Code	Country Name
MOZ	Mozambique
MRT	Mauritania
MSR	Montserrat
MTQ	Martinique
MUS	Mauritius
MWI	Malawi
MYS	Malaysia
MYT	Mayotte
NAM	Namibia
NCL	New Caledonia
NER	Niger
NFK	Norfolk Island
NGA	Nigeria
NIC	Nicaragua
NIU	Niue
NLD	Netherlands
NOR	Norway
NPL	Nepal
NRU	Nauru
NZL	New Zealand
OMN	Oman
PAK	Pakistan
PAN	Panama
PCN	Pitcairn
PER	Peru
PHL	Philippines
PLW	Palau

ISO Country Code	Country Name
PNG	Papua New Guinea
POL	Poland
PRI	Puerto Rico
PRK	Korea, Democratic People's Rep
PRT	Portugal
PRY	Paraguay
PSE	Palestinian Territory, Occupie
PYF	French Polynesia
QAT	Qatar
REU	Reunion
ROU	Romania
RUS	Russian Federation
RWA	Rwanda
SAU	Saudi Arabia
SDN	Sudan
SEN	Senegal
SGP	Singapore
SGS	Sth Georgia & Sth Sandwich Is
SHN	Saint Helena
SJM	Svalbard and Jan Mayen
SLB	Solomon Islands
SLE	Sierra Leone
SLV	El Salvador
SMR	San Marino
SOM	Somalia
SPM	Saint Pierre and Miquelon
STP	Sao Tome and Principe

ISO Country Code	Country Name
SUR	Suriname
SVK	Slovakia
SVN	Slovenia
SWE	Sweden
SWZ	Swaziland
SYC	Seychelles
SYR	Syrian Arab Republic
TCA	Turks and Caicos Islands
TCD	Chad
TGO	Togo
THA	Thailand
TJK	Tajikistan
TKL	Tokelau
TKM	Turkmenistan
TLS	East Timor
TON	Tonga
TTO	Trinidad and Tobago
TUN	Tunisia
TUR	Turkey
TUV	Tuvalu
TWN	Taiwan, Province of China
TZA	Tanzania, United Republic of
UGA	Uganda
UKR	Ukraine
UMI	US Minor Outlying Islands
URY	Uruguay
USA	United States

ISO Country Code	Country Name
UZB	Uzbekistan
VAT	Holy See (Vatican City State)
VCT	St Vincent and the Grenadines
VEN	Venezuela
VGB	Virgin Islands (British)
VIR	Virgin Islands (U.S.)
VNM	Viet Nam
VUT	Vanuatu
WLF	Wallis and Futuna Islands
WSM	Samoa
YEM	Yemen
YUG	Yugoslavia
ZAF	South Africa
ZMB	Zambia
ZWE	Zimbabwe

ISO Currency Codes

This table lists the ISO country codes that may appear as currency identifiers in PeopleBooks:

ISO Currency Code	Description
ADP	Andorran Peseta
AED	United Arab Emirates Dirham
AFA	Afghani
AFN	Afghani
ALK	Old Lek
ALL	Lek
AMD	Armenian Dram

ISO Currency Code	Description
ANG	Netherlands Antilles Guilder
AOA	Kwanza
AOK	Kwanza
AON	New Kwanza
AOR	Kwanza Reajustado
ARA	Austral
ARP	Peso Argentino
ARS	Argentine Peso
ARY	Peso
ATS	Schilling
AUD	Australian Dollar
AWG	Aruban Guilder
AZM	Azerbaijanian Manat
BAD	Dinar
BAM	Convertible Marks
BBD	Barbados Dollar
BDT	Taka
BEC	Convertible Franc
BEF	Belgian Franc
BEL	Financial Belgian Franc
BGJ	Lev A/52
BGK	Lev A/62
BGL	Lev
BGN	Bulgarian LEV
BHD	Bahraini Dinar
BIF	Burundi Franc
BMD	Bermudian Dollar

ISO Currency Code	Description
BND	Brunei Dollar
BOB	Boliviano
BOP	Peso
BOV	Mvdol
BRB	Cruzeiro
BRC	Cruzado
BRE	Cruzeiro
BRL	Brazilian Real
BRN	New Cruzado
BRR	Brazilian Real Dollar
BSD	Bahamian Dollar
BTN	Ngultrum
BUK	N/A
BWP	Pula
BYB	Belarussian Ruble
BYR	Belarussian Ruble
BZD	Belize Dollar
CAD	Canadian Dollar
CDF	Franc Congolais
CHF	Swiss Franc
CLF	Unidades de fomento
CLP	Chilean Peso
CNX	Peoples Bank Dollar
CNY	Yuan Renminbi
COP	Colombian Peso
CRC	Costa Rican Colon
CSD	Serbia Dinar

ISO Currency Code	Description
CSJ	Krona A/53
CSK	Koruna
CUP	Cuban Peso
CVE	Cape Verde Escudo
CYP	Cyprus Pound
CZK	Czech Koruna
DEM	Deutsche Mark
DJF	Djibouti Franc
DKK	Danish Krone
DOP	Dominican Peso
DZD	Algerian Dinar
ECS	Sucre
ECV	Unidad de Valor
EEK	Kroon
EGP	Egyptian Pound
EQE	Ekwele
ERN	Nakfa
ESA	Spanish Peseta
ESB	Convertible Peseta
ESP	Spanish Peseta
ETB	Ethiopian Birr
EUR	euro
FIM	Markka
FJD	Fiji Dollar
FKP	Falklands Isl. Pound
FRF	French Franc
GBP	Pound Sterling

ISO Currency Code	Description
GEK	Georgian Coupon
GEL	Lari
GHC	Cedi
GIP	Gibraltar Pound
GMD	Dalasi
GNE	Syli
GNF	Guinea Franc
GNS	Syli
GQE	Ekwele
GRD	Drachma
GTQ	Quetzal
GWE	Guinea Escudo
GWP	Guinea-Bissau Peso
GYD	Guyana Dollar
HKD	Hong Kong Dollar
HNL	Lempira
HRD	Dinar
HRK	Kuna
HTG	Gourde
HUF	Forint
IDR	Rupiah
IEP	Irish Pound
ILP	Pound
ILR	Old Shekel
ILS	New Israeli Sheqel
INR	Indian Rupee
IQD	Iraqi Dinar

ISO Currency Code	Description
IRR	Iranian Rial
ISJ	Old Krona
ISK	Iceland Krona
ITL	Italian Lira
JMD	Jamaican Dollar
JOD	Jordanian Dinar
JPY	Yen
KES	Kenyan Shilling
KGS	Som
KHR	Riel
KMF	Comoro Franc
KPW	North Korean Won
KRW	Won
KWD	Kuwaiti Dinar
KYD	Cayman Islands dollar
KZT	Tenge
LAJ	Kip Pot Pol
LAK	Kip
LBP	Lebanese Pound
LKR	Sri Lanka Rupee
LRD	Liberian Dollar
LSL	Loti
LSM	Maloti
LTL	Lithuanian Litas
LTT	Talonas
LUC	Convertib Francl
LUF	Luxembourg Franc

ISO Currency Code	Description
LUL	Financial Franc
LVL	Latvian Lats
LVR	Latvian Ruble
LYD	Libyan Dinar
MAD	Moroccan Dirham
MAF	Mali Franc
MDL	Moldovan Leu
MGF	Malagasy Franc
MKD	Denar
MLF	Mali Franc
MMK	Kyat
MNT	Tugrik
MOP	Pataca
MRO	Ouguiya
MTL	Maltese Lira
MTP	Maltese Pound
MUR	Mauritius Rupee
MVQ	Maldive Rupee
MVR	Rufiyaa
MWK	Malawian Kwacha
MXN	Mexican Peso
MXP	Mexican Peso
MXV	Mexican UDI
MYR	Malaysian Ringgit
MZE	Mozambique Escudo
MZM	Metical
NAD	Namibia Dollar

ISO Currency Code	Description
NGN	Naira
NIC	Cordoba
NIO	Cordoba Oro
NLG	Netherlands Guilder
NOK	Norwegian Krone
NPR	Nepalese Rupee
NZD	New Zealand Dollar
OMR	Rial Omani
PAB	Balboa
PEI	Inti
PEN	Nuevo Sol
PES	Sol
PGK	Kina
PHP	Philippine Peso
PKR	Pakistan Rupee
PLN	Zloty
PLZ	Zloty
PTE	Portuguese Escudo
PYG	Guarani
QAR	Qatari Rial
ROK	Leu A/52
ROL	Leu
RUB	Russian Ruble
RUR	Russian Federation Rouble
RWF	Rwanda Franc
SAR	Saudi Riyal
SBD	Solomon Islands

ISO Currency Code	Description
SCR	Seychelles Rupee
SDD	Sudanese Dinar
SDP	Sudanese Pound
SEK	Swedish Krona
SGD	Singapore Dollar
SHP	St Helena Pound
SIT	Tolar
SKK	Slovak Koruna
SLL	Leone
SOS	Somali Shilling
SRG	Surinam Guilder
STD	Dobra
SUR	Rouble
SVC	El Salvador Colon
SYP	Syrian Pound
SZL	Lilangeni
THB	Baht
TJR	Tajik Ruble
TJS	Somoni
TMM	Manat
TND	Tunisian Dinar
TOP	Pa'anga
TPE	Timor Escudo
TRL	Turkish Lira
TTD	Trinidad Dollar
TWD	New Taiwan Dollar
TZS	Tanzanian Shilling

ISO Currency Code	Description
UAH	Hryvnia
UAK	Karbovanet
UGS	Uganda Shilling
UGW	Old Shilling
UGX	Uganda Shilling
USD	US Dollar
USN	US Dollar (Next day)
USS	US Dollar (Same day)
UYN	Old Uruguay Peso
UYP	Uruguayan Peso
UYU	Peso Uruguayo
UZS	Uzbekistan Sum
VEB	Bolivar
VNC	Old Dong
VND	Dong
VUV	Vatu
WST	Tala
XAF	CFA Franc BEAC
XAG	Silver
XAU	GOLD
XBA	European Composite Unit
XBB	European Monetary Unit
XBC	European Unit of Account 9
XBD	European Unit of Account 17
XCD	East Caribbean Dollar
XDR	SDR
XEU	EU Currency (E.C.U)

ISO Currency Code	Description
XFO	Gold-Franc
XFU	UIC-Franc
XOF	CFA Franc BCEAO
XPD	Palladium
XPF	CFP Franc
XPT	Platinum
XTS	For Testing Purposes
XXX	Non Currency Transaction
YDD	Yemeni Din
YER	Yemeni Rial
YUD	New Yugoslavian Dinar
YUM	New Dinar
YUN	Yugoslavian Dinar
ZAL	Financial Rand
ZAR	Rand
ZMK	Zambian Kwacha
ZRN	New Zaire
ZRZ	Zaire
ZWC	Rhodesian Dollar
ZWD	Zimbabwe Dollar

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*
clone	In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method
In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type
In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

directory information tree
In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

document sequencing
A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree
A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table
A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date
A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger
Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set
In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event
In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization
In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

event
A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process
In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
KPI	An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

load In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template — In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

match group — In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server — Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity — In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL — Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring — Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook — In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency — The ability to process transactions in a currency other than the business unit's base currency.

national allowance — In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

node-oriented tree — A tree that is based on a detail structure, but the detail values are not used.

pagelet — Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

participant — In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object — Each participant object may be related to one or more compensation objects.

See also *compensation object*.

partner — A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle — In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

pending item — In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

price rule key In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

process definition Process definitions define each run request.

process instance A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

process job You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag
Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

reference data
In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object
In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction
In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing
In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object
In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data
Data that is extracted from a separate database and migrated into the local database.

REN server
Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester
In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

role
Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user
A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up
In a tree, to roll up is to total sums based on the information hierarchy.

run control
A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID
A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

serial genealogy In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

session In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

single signon With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source transaction In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

trace usage
In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation
In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state
In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.

Translate table
A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree
The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

unclaimed transaction
In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header
Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

user interaction object
In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable
In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

VAT exception
Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt
Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration
Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension
Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse
A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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