



PeopleSoft Enterprise Strategic Account Planning 8.9 PeopleBook

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About This PeopleBook

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

This preface discusses:

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

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

PeopleSoft Application Prerequisites

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

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

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

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

PeopleSoft Application Fundamentals

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

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

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Ordering Printed Documentation

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

- Web
- Telephone
- Email

Web

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

Telephone

Contact MMA Partners at 877 588 2525.

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

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

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

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

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

Once, Always, and Don't Run

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

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

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

Report Manager

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

Process Monitor

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

Run

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

Request ID

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

User ID

An ID that represents the person who generates a transaction.

SetID

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

Short Description

Enter up to 15 characters of text.

PeopleSoft Enterprise Strategic Account Planning Preface

This preface discusses:

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

PeopleTools PeopleBooks

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

CHAPTER 1

Getting Started with PeopleSoft Enterprise Strategic Account Planning

This chapter provides an overview of PeopleSoft Strategic Account Planning and discusses:

- PeopleSoft Strategic Account Planning business processes.
- PeopleSoft Strategic Account Planning integrations.
- PeopleSoft Strategic Account Planning implementation.

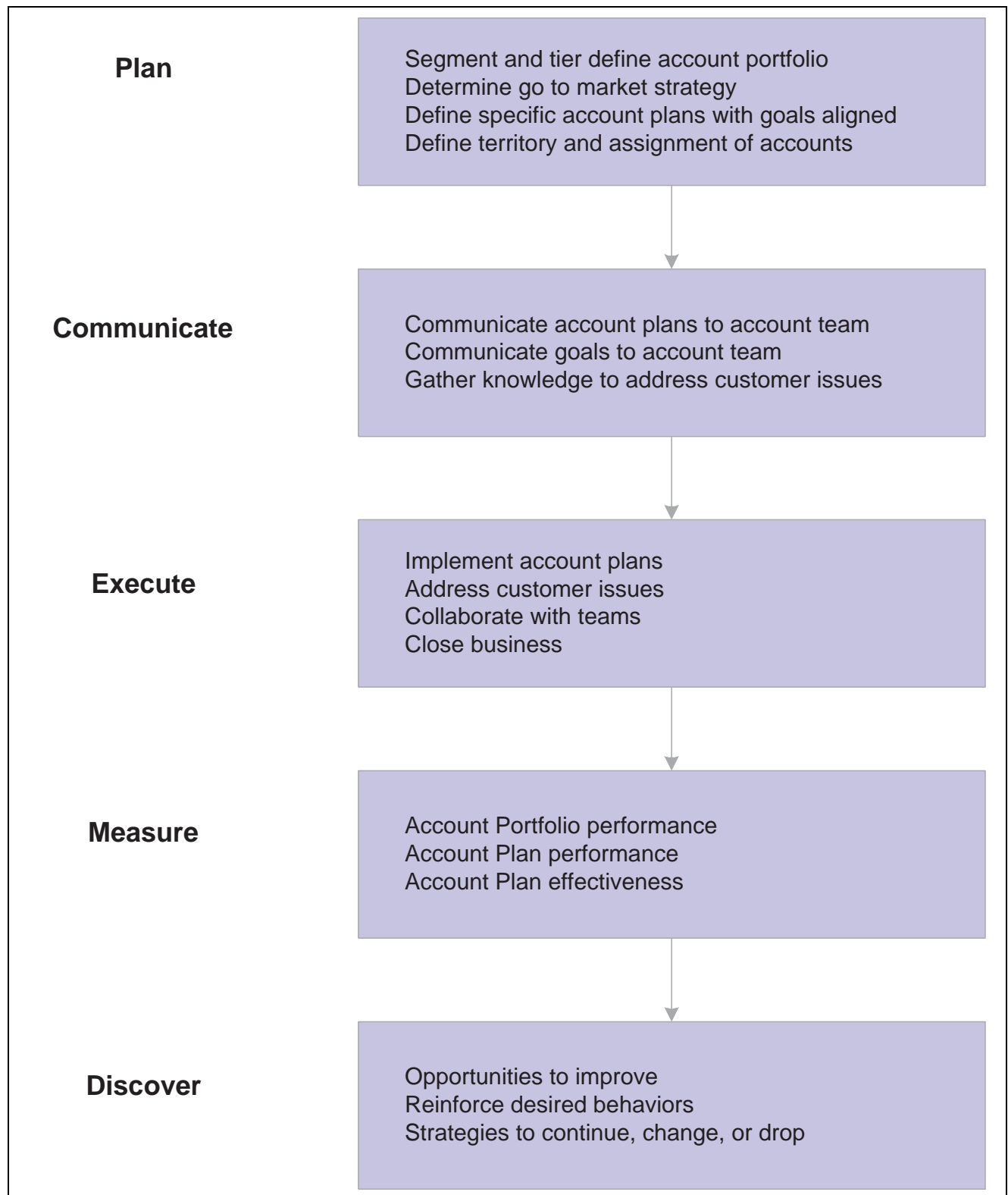
PeopleSoft Strategic Account Planning Overview

PeopleSoft Strategic Account Planning provides tools that enable you to leverage customer value data to drive strategic planning and budgeting for the entire customer lifecycle—marketing, sales, and service. With this application you can:

- Evaluate customer value and needs.
- Develop sales and support strategies to maximize customer value.
- Allocate resources based on customer value.
- Identify new opportunities to increase customer value.
- Collaborate with account team members and partners.
- Measure and improve account performance.

PeopleSoft Strategic Account Planning Business Processes

This diagram lists PeopleSoft Strategic Account Planning business processes. We discuss these business processes in the business process chapters in this PeopleBook:



Strategic Account Planning business processes

Using PeopleSoft Strategic Account Planning, you can:

- Organize account portfolio by segment or tier.

- Plan market strategy.
- Define specific account plans with goals aligned with market strategy.
- Define territory and assignment of accounts.
- Communicate account plans, goals and their target values to account team members.
- Identify and address customer issues.
- Measure account portfolio performance, account plan performance, the effectiveness of the account plan.

PeopleSoft Strategic Account Planning Integrations

By leveraging the Active Analytics framework, you can integrate PeopleSoft Strategic Account Planning with any of the other products in the CRM product line to obtain goal and metric data for account plans. For example, integration to PeopleSoft Sales enables you to set goals and track goal attainment using the information captured in the PeopleSoft Sales product, for example leads and opportunities. Integrate with PeopleSoft Client Manager to set and track account plan goals based on a client's personal goals, such as target retirement age.

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

In addition to supplying additional goal and metric data, integration with the following products expands the features of your strategic account planning solution:

PeopleSoft Marketing

Integrate with PeopleSoft Marketing to enable account plans at the segment level. Segmenting the customer base allows you to group like customers and enables uniform planning across them. Account managers who are responsible for a large set of accounts or consumers can segment them into smaller groups based on revenue, profitability, and common characteristics such as industry, geography, or buying requirements.

See *PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook*, “Using Audiences,” Understanding Audiences.

PeopleSoft SmartViews

Integrate with PeopleSoft SmartViews to make it easy to identify specific issues to address in the account. You can track performance in individual accounts or roll up key metrics to see aggregate performance in a single view. For each metric, account managers can compare actual versus target goal attainment.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “SmartViews”.

PeopleSoft Mobile Account Planning

Integrate with PeopleSoft Mobile Account Planning to enable your traveling field representatives to view goals and objectives for their accounts on their laptops. Mobile users can view account plans while they are on the road to make sure they are well informed about the account's history and performance targets before calling on the customer.

See *PeopleSoft Enterprise CRM 8.9 Mobile Applications PeopleBook*, “Using PeopleSoft Enterprise Mobile Account Planning”.

PeopleSoft Partner Planning

Integrate with PeopleSoft Partner Relationship Management to improve collaboration by clearly identifying key tasks, due dates, and owners to meet the plan objectives. Managers control who can access and edit the account plan.

See *PeopleSoft Enterprise Partner Relationship Management 8.9 PeopleBook*.

PeopleSoft Strategic Account Planning Implementation

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

Other Sources of Information

In the implementation planning phase, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources is in the preface of the *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook* and *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook* with information on where to find the most up-to-date version of each.

See Also

PeopleSoft Enterprise Setup Manager for Customer Relationship Management 8.9 PeopleBook

CHAPTER 2

Understanding PeopleSoft Strategic Account Planning

This chapter discusses:

- Strategic account planning.
- Strategic account planning business processes.
- Account assignment.
- Account planning.
- Audience segmentation.
- Reporting and metrics.

Strategic Account Planning

PeopleSoft Enterprise Strategic Account Planning enables your organization to capture maximum value throughout the customer lifecycle. It helps you align your strategy with customer needs and corporate objectives and measure progress against metrics-driven goals. You can segment your customers and consumers and work with partners to identify opportunities in high-potential or underperforming accounts. Performance metrics can be customized for your business, leveraging both internal and external data sources. You can also improve execution of the account strategy by triggering recommended actions based on actual versus target goal attainment. With Strategic Account Planning, you can proactively manage your resources to extract more value from every customer relationship.

At the simplest level, strategic account planning is the process of managing accounts at a company or client level rather than the opportunity level. An account can be a company, consumer, site or partner. Account planning is the process of setting the goals for the accounts and measuring those goals. Account management represents a fundamental shift— regardless of business model—away from a transaction-oriented approach to account based relationship building

PeopleSoft Strategic Account Planning Business Processes

Strategic Account Planning enables you to plan for and manage the customer relationship through the following stages:

- Evaluate customer value and needs.

Strategic Account Planning helps your organization identify the customers who will bring you the most value and greatest profit. It helps your account team evaluate each customer's current and long-term revenue potential, as well as strategic importance, so that you can invest the right level of resources to serve them profitably.

You can manage your customers at both the company and account manager level. Accounts will typically be grouped into customer portfolios at the company level. Your account managers can further segment their territory based on criteria they define.

Global account managers who cover a few major customers can segment them into smaller divisions to identify cross-sell and up-sell opportunities. Account managers who are responsible for a large set of accounts or consumers can segment them into smaller groups based on revenue, profitability, and common characteristics such as industry, geography, or buying requirements. This feature helps account managers focus their time and efforts on the right customers.

- Develop a measurable strategy.

The account strategy drives your plan for managing the customer lifecycle. It determines how you can capture more value from both high-potential and underperforming accounts. Different customers require different strategies. Each strategy must be based on measurable goals and objectives to help you track the progress your team and partners are making in the account.

Account managers can use Strategic Account Planning to:

- Define metrics-driven goals and qualitative objectives for each account.
- Align account goals and compensation with corporate objectives.
- Identify critical success factors for reaching plan targets.
- Outline the value proposition required to meet the customer's specific needs.

- Allocate resources based on customer value.

The next step is to determine how you will allocate limited resources to execute your account strategy. To drive profitable revenue growth, you need to choose the most cost-effective channels while ensuring a seamless experience that optimally meets your customers' needs.

Strategic Account Planning enables you to match the right resources to market, sell to, and provide service to your customers. Team members are automatically or manually assigned to accounts based on criteria that you define. Territory changes are automatically updated so that your accounts are always assigned to the right account manager. You can also create account plans to leverage partners in capturing more value from key customers. Finally, you can quickly adjust your resource allocation by measuring and monitoring performance against account goals and objectives.

- Identify new opportunities to increase customer value.

Strategic Account Planning provides a centralized repository of all account information, delivering a complete, 360-degree view across the enterprise of all the sales, marketing, and service interactions with the customer. PeopleSoft also has prebuilt integration to third-party data sources so that account managers can leverage real-time information to uncover new opportunities to increase customer value.

- Collaborate with account team and partners.

Strategic Account Planning improves collaboration by clearly identifying key tasks, due dates, and owners to meet the plan objectives. Managers control who can access and edit the account plan. You can also use PeopleSoft's inline analytics to drive plan execution. Based on progress against account goals, the application will trigger alerts and recommended actions.

The account plan helps the team identify which relationships they can leverage to influence key decision makers. The account team can view all the contacts associated with the account and track metrics, such as number of meetings with key contacts, to evaluate how well they are executing against the relationship strategy.

Account Assignment

This section discusses:

- Global account programs.
- National and regional account programs.
- Organizational structure.

Global Account Programs

A global account program is an integrated, multinational framework for implementing a strategic, global account management process. A closer look at global account programs in practice reveals the difficulty in both defining and understanding what exactly constitutes a global program versus a national, regional, international or multinational program, and what is a global account. Companies use varying criteria of geography and customer characteristics in classifying their accounts and programs. Yet, in-depth research with individual companies suggests that factors such as a high level of process and systems integration, geographical spread, and worldwide coordination of resources and operations distinguish the global account programs.

National and Regional Account Programs

A national or regional account program possesses a number of key processes to successfully implement corporate strategy for strategic accounts. These include: securing senior management support, creating the appropriate internal systems to coordinate activity nationally or regionally, building the appropriate product or service delivery model, account planning, program and account metrics, training and educating the right people, using compensation to drive the right behavior to achieve account objectives, and optimizing technology and IT systems for national and regional account communications and knowledge management.

National account programs establish centralized decision-making and operate within a uniform culture. Regional account programs may cross national boundaries but tend to develop semi-autonomous operations defined around geographical locations such as Europe, North America, or the Pacific Rim. Within these programs, decision-making is more decentralized; organizational processes are more complex, and the culture more diverse.

By contrast, global account programs coordinate worldwide process and operations, utilizing both centralized and decentralized decision-making to implement a corporate global strategy at regional and local levels worldwide. Organizational complexity is high and cultural sensibilities are a critical success factor for global account relationships.

Organizational Structure

Organizational structure for a strategic accounts program refers to the company reporting structure and design of infrastructure for delivery of product, service, and solutions to key customers.

In some corporations, organizational structure for strategic accounts is integrated into an existing centralized structure. Where existing corporate structure is decentralized, however, a strategic accounts organization can be created as an umbrella while the underlying structure is left in place. Functionally effective strategic account programs have been implemented using each of these approaches.

Internal alignment goes hand in hand with internal selling by the strategic accounts group to make the business case for strategic account management among all the stakeholders in the corporation. The sales force architecture that has territory and division salespeople staking claim to accounts and turf is deeply rooted in many corporate cultures.

Organizational structure for a global accounts program versus a national or regional program typically involves a higher degree of structural complexity, flexibility and a combination of both centralized and decentralized authority.

Account Planning

Account planning is a process of planning for a strategic account that provides an understanding of the customer or client's position, compiles and analyzes data, sets goals, establishes responsibilities, allocates resources, and sets measurable objectives. Unlike most traditional account planning, strategic account planning is meant to be a flexible, collaborative, and ongoing activity that is both comprehensive and linked to the day-to-day management of a strategic account.

Account planning usually involves the strategic account manager, their manager, account team, and possibly the customer, and the focus of an account plan will differ according to the go-to-market strategy developed for that account. Components of a plan frequently include: a mission statement, industry/market/ customer overview, business objectives alignment, position/performance in the account, resource allocation, strategic opportunities and value-based account plan objectives.

Audience Segmentation

Audience segmentation tools enable organizations to finely target customers and prospects based on customer or profile attributes. These tools are invaluable for organizations that need to prioritize customer investments and strategies based on tangible criteria such as customer value, customer profitability, and other custom metrics.

Audience segmentation tools provide an interactive graphical segmentation tree display and show hierarchical segment relationships and real-time counts. The visual and detailed nature of these new capabilities enables marketers to support the natural, iterative segmentation process while quickly gaining insight into customer segments.

Audience segmentation includes:

- A visual segment builder.

You can define segments (groups of customers defined by selection criteria). Hierarchical relationships between segments are included, and you can clearly and easily view them in a visual and interactive tree structure. Using the visual segment builder, you can see the hierarchies created by parent-child relationships of segments. Further, segments can be contained in segment groups, which enable you to group segments and segment hierarchies in a logical fashion.

- Enterprise segment definitions.

Segments can be published to be actionable. When a segment is published, it is available for use by various components, including the AAF, Strategic Account Planning, and SmartViews. In the AAF, these terms can be used to build any conditions in an AAF policy. For Strategic Account Planning and SmartViews, users can select published segments to create a segment plan. They can set objectives and goals, and they can view the overall performance of the segments through Strategic Account Planning and SmartViews.

- Integration with a virtual data library.

New types of selection criteria are supported, enabling you to select from the AAF data library terms, audience and segment membership, campaign execution data (for example, marketing contacts this month via email), and campaign response data (for example, individuals who placed an order and referenced a campaign's promotion code).

Reporting and Metrics

This section discusses:

- Metrics – Program / Account
- Account Selection and Segmentation

Metrics – Program / Account

The metrics of a strategic account program or strategic account are the measurements by which the objectives of an individual account plan, relationship or portfolio of account relationships are evaluated. The criteria for these assessments cover a range of expectations established individually and jointly by the supplier and the customer who anticipate mutually beneficial results from the relationship.

Metrics define the value or set of values the supplier brings to the customer, the value the customer provides to the supplier, and the shared value. Value is represented in both financial and relationship-based terms and, ideally, is incorporated into the account plan at the beginning of the partnership.

Examples of value and measurements include: segment loyalty and growth achievement, expanse of executive relationships (broad / deep), mutual gain in productivity and efficiency, increased share of client's total spend, acknowledgement of client of the value of partnership, and improvement in client's business results.

Account Selection and Segmentation

The process of account selection and segmentation is a systematic method for optimum customer portfolio management. Account selection is part of determining the go-to-market strategy for each customer. Using a set of tools and criteria, accounts are selected as well as de-selected, and they can be segmented or tiered according to varying levels of resource allocation, funding, and service. The process of account selection requires the supplier to first define a strategic account. For example, one company defines strategic accounts as “those accounts that are managed separately from the organization's traditional sales channels, by account managers who have total responsibility for the sales, business processes, value proposition and customer satisfaction ”

The account team's perspective and input contribute to objective evaluations of accounts, helping to match the supplier's comparative capability to customer opportunities. Importantly, the process can determine in which accounts a supplier is over-invested or under-invested, a critical determinant of business success. Proper account selection is considered a critical step in the design of a strategic account program.

CHAPTER 3

Setting Up PeopleSoft Strategic Account Planning

This chapter provides an overview and discusses how to:

- Set up objectives.
- Set up supported roles for planning.
- Define plan types.
- Define assessments.
- Define goals.
- Create a territory tree for accounts.

Understanding Setup for PeopleSoft Strategic Account Planning

This section provides an overview of:

- Objectives
- Supported roles for planning
- Plan types
- Assessments
- Goals

Understanding Objectives

Strategic objectives relate to outcomes that strengthen an organization's overall business position and competitive vitality. Objectives are defined at a higher level than goals. For example, an objective might be to increase revenue from additional sales. At the goal level, this objective would be defined in measurable terms such as increasing revenue by 25%.

Objectives are defaulted from the plan type to the template but you can select more objectives by either selecting from pre-defined objectives or by creating custom objectives.

Understanding Supported Roles for Planning

PeopleSoft delivers four supported roles for planning—company, consumer, partner, and site. Supported roles are used when defining accounts. Role types are associated with plan type to identify the plan types applicable to specific roles.

Understanding Plan Types

Plan types are used in the creation of the account template. The definition of a plan type controls the free form text fields in the Details section of the Account plan component. For example, Value Statement and Critical Success Factors appear because they are set up for the plan type of 'SALES'

Understanding Assessments

Assessments are the quantifiable definition of plan goals. The assessments are associated to plan goals in the template and in the account plan itself

Assessment name specifies what are the visual status breaks to display (Green, Red, Yellow and so on) and what is the variance indicator associated to the associated assessment.

The assessments show visual icons to depict the plan goal's status break. For example, if the plan meets 100% of the target, the system will show a green icon whereas it will show red when actual < 60% of the target. These icons will be displayed in the Dashboard as well. The purpose of the variance indicator is to indicate whether the high attainment is good or bad for a goal. For example, achieving high revenue number is good, whereas having high number of reported bugs is not good.

Understanding Goals

Goals are the quantifiable measurements of objectives. A goal has a target and an attainment. The attainment can be measured using the data library or can be entered manually.

In a template or in a plan, you can add a new goal by either selecting a shared goal, which is already set up, or by manually entering all the details. You can also add a minimum or maximum limit on the goal target.

Setting Up Objectives

To set up objectives, use the Objectives (RSP_OBJECTIVE) component.

This section discusses how to define objectives for account or segment planning.

Pages Used to Set Up Objectives

Page Name	Object Name	Navigation	Usage
Objectives	RSP_OBJECTIVE	Set Up CRM, Product Related, Strategic Account Planning, Objectives	Create objectives for account or segment planning.
Strategic Plan Objectives - Objective Details	RSP_OBJECTIVE_SEC	Set Up CRM, Product Related, Strategic Account Planning, Objectives, Enter Objective Description	Create objective descriptions.

Setting Up Objectives

Access the Objectives page.

Objectives

SetID IPROD Description Appliances

Define Objectives

Customize | Find |

First 1-16 of 16 Last

Objective Code	Objective Name	Description	Status		
OB01	Increase Revenue	Increase revenue from addition	Active	+	-
OB02	Lower Transaction Costs	Lower Transaction Costs for co	Active	+	-
OB03	Cross Sell and Up Sell	Cross Sell and Up Sell on ever	Active	+	-
OB04	Reduce Installation Costs	Reduce Installation Costs. Foc	Active	+	-
OB05	Increase Customer Satisfaction	Increase Customer Satisfaction	Active	+	-
OB06	Retain Customers	Retain Customers. Increase cu	Active	+	-
OB07	Increase Partner Loyalty	Ensure our partners are satisf	Active	+	-
OB08	Drive First Call Resolution	Drive First Call Resolution in	Active	+	-
OB09	Drive Service Sales	Drive Service Sales. Get the	Active	+	-
OB10	Qualify Prospects	Increase effort to qualify a h	Active	+	-
OB11	Initiate Increased Customer Inter.	Initiate Increased Customer In	Active	+	-
OB12	Key Business Drivers	In order to maximize the poten	Active	+	-
OB13	Value Proposition	After key business drivers hav	Active	+	-
OB14	Critical Success Factors	Listen, Observe and Respond in	Active	+	-
OB15	Account Strategy	The overall strategy is to inc	Active	+	-
		Enter Objective Description	Active	+	-

Objectives page

- Objective Code

Enter a four character code for the objective.
- Objective Name

Enter a name for the objective.

Setting Up Supported Roles for Planning

To set up supported roles for planning, use the Supported Roles for Planning (RSP_ROLES) component. This section discusses how to define supported roles for account planning.

Page Used to Set Up Supported Roles for Planning




Page Name	Object Name	Navigation	Usage
Supported Roles for Planning	RSP_ROLES	Set Up CRM, Product Related, Strategic Account Planning, Supported Roles for Planning	Define supported roles for account planning.













Setting Up Supported Roles for Planning

Access the Supported Roles for Planning page.

Supported Roles for Planning

SetID IPROD **Description** Appliances

Select Roles For Account Planning Customize | Find |  First  1-4 of 4  Last

Rolename		Role#	Status		
Company		2	Active		
Site		3	Active		
Consume		9	Active		
Partner		11	Active		

Supported Roles for Planning page

- Rolename** Select a role for account planning. Possible values are *Company*, *Consumer*, *Partner*, and *Site*.
- Role # (Role Number)** Displays the role number for the Rolename you entered.
- Status** Select a status for the role. Possible values are *Active* and *Inactive*.

Defining Plan Types

To define plan types, use the Plan Type (RSP_PLAN_TYPE) component.

This section discusses how to define plan types for account or segment planning. You use plan types when you define goals and create account templates.

Page Used to Define Plan Types

Page Name	Object Name	Navigation	Usage
Plan Type	RSP_PLAN_TYPE	Set Up CRM, Product Related, Strategic Account Planning, Plan Types	Define plan types for account planning.

Defining Plan Types

Access the Plan Types page.

Plan Type

SetID IPROD **Description** Appliances

Plan Type SALES **Status** Active

***Description** Sales

Subject Area Folder Name

Specify Default Subject Area folder to select Terms for automatic attainment Calculation.
Portfolio Management . Sales Metrics

Usage Customize | Find | View All | First 1-2 of 2 Last

***Usage**

Account Planning	+	-
Segment/Audience Planning	+	-

Objectives Customize | Find | First 1-5 of 5 Last

*Sequence	Objective Name		
1	Increase Revenue	+	-
2	Cross Sell and Up Sell	+	-
3	Initiate Increased Customer Interactions	+	-
4	Qualify Prospects	+	-
5	Increase Customer Satisfaction	+	-

Applicable Roles Customize | Find | First 1-2 of 2 Last

Role Type	Status		
Company	Active	+	-
Site	Active	+	-

Plan Type page

Description	Enter a description for the plan type. This is a required field.
Status	Select a status for the plan type. Possible values are <i>Active</i> and <i>Inactive</i> .
Subject Area	Select a default subject area to specify terms for the automatic attainment calculation.
Usage	Select the usage for the plan type. Possible values are <i>Account Planning</i> and <i>Segment/Audience Planning</i> . This is a required field. If you want the plan type to be used for both account planning and segment/audience planning, add a row and select both values.
Sequence	Enter a number that orders the objectives.
Objective Name	Select an objective that you defined on the Objectives page. Add lines as necessary to define additional objectives for the plan type.
Role Type	Select a role type that you defined on the Supported Roles For Planning page. Add lines as necessary to define additional role types for the plan type.
Status	Select a status for the role type. Possible values are <i>Active</i> and <i>Inactive</i> .

Defining Assessments

To define assessments, use the Assessments (RSP_ASSESSMENT) component.

This section discusses how to define assessments, which are user-defined methods of evaluating plan goals.

Page Used to Define Assessments

Page Name	Object Name	Navigation	Usage
Assessments	RSP_ASSESSMENT	Set Up CRM, Product Related, Strategic Account Planning, Define Assessments	Define assessments for evaluating plan goals.

Defining Assessments

Access the Assessments page.

Assessments

SetID IPROD Description Appliances

Define Assessments

Find | View All

First 1 of 3 Last

Assessment Code HGAssessment Name High Growth

+ -

*Variance Indicator High

Assessment Parameters

Customize | Find

First 1-3 of 3 Last

*Seq	Actual	*Operator	*Value	And	Value2	Target	*Label	*Image Name		
1	Actual	>	120			% of Target	Exceeds	PS_STATUS_GOAL_EXC		+ -
2	Actual	Between	80	And	120	% of Target	Meets	PS_STATUS_GOAL_MET		+ -
3	Actual	<	80			% of Target	Missed	PS_STATUS_GOAL_MIS		+ -

Assessments page

- Assessment Code

Enter a two character code for the assessment.
- Assessment Name

Enter a name for the assessment.
- Variance Indicator

Select either *High* or *Low*. This denotes whether a high value or a low value is a positive for a goal. For example, if the goal is revenue generation, then select *High*. If the goal is product failures, then select *Low*.
- Seq(Sequence)

Enter a sequence number for the assessment line.
- Operator

Enter an operator for the assessment line. Possible values are <, <=, =, >=, >, and *Between*.
- Value

Enter a numeric value to compare against the actual value. If you enter *Between* as the Operator, enter a numeric value that is the low end of the range.

Value2	If you enter <i>Between</i> as the Operator, enter a numeric value that is the high end of the range.
Label	Enter a label that describes the outcome specified on the assessment line. For example, if the actual is greater than 125% of the target, you can enter a label of “Very Good.”
Image Name	Select an image file that the system displays on the Dashboard and plan results pages when the actual results match the criteria specified on the assessment line. After you select the image file, the system displays the actual image to the right of this field.

Defining Goals

To define goals, use the Goal (RSP_GOAL_TBL) component.

This section discusses how to define goals. Each account or segment plan that you create contains goals. You can manually enter goals on each account or segment plan. Also, if you have goals that are used on multiple account and segment plans, you can define shared goals on the Goal page and then associate these shared goals with the appropriate account and segment plans.

Pages Used to Define Goals

Page Name	Object Name	Navigation	Usage
Goal	RSP_GOAL_TBL	Set Up CRM, Product Related, Strategic Account Planning, Define Goal	Define goals for account planning.
Term Selection Page	RSP_GOAL_EOCF_SEC	Set Up CRM, Product Related, Strategic Account Planning, Define Goal, Select Term	Select a term for the goal.

Defining Goals

Access the Goal page.

Goal page

Name	Enter a name for the goal.
Short Name	Enter a short name for the goal.
Usage	Select the usage for the goal. Possible values are: <i>Planning</i> This goal is used only for planning. <i>Portfolio Manager</i> This goal (metric) is used within Portfolio Manager for reporting purpose only. <i>Both Planning and Portfolio</i> This goal can be used for planning as well as Reporting purpose within Portfolio Manager.
Status	Select a status for the goal. Possible values are <i>Active</i> and <i>Inactive</i> .
Plan Type	Select a plan type for the goal.
Calc Method (calculation method)	Specify whether the attainment for the goal will be calculated automatically from the system or manually entered by the user.
Term Name	Click the Select Term link to access the Term Selection page. Strategic Planning integrates Terms setup under Active Analytics Framework (AAF) to calculate the attainment of a goal
Can Be Aggregated	Check to indicate that this value can be used in an aggregate calculation.
Type	Select a value based on the type of goal. Possible values are <i>Amount</i> , <i>Other</i> , <i>Percent</i> and <i>Quantity</i> . For example, if the goal is revenue generation, select <i>Amount</i> . If the goal is number of new accounts, select <i>Quantity</i> .
Variance Indicator	Select where a high or low value is positive for the goal. Possible values are <i>High is Positive</i> and <i>Low is Positive</i> .
Min Target (minimum target)	Enter the minimum target value for the goal.
Max Target (maximum target)	Enter the maximum target value for the goal.
Default Target	Enter the default target value for the goal.
Assessment	Select an assessment name that you defined on the Define Assessments page.

Creating a Territory Tree for Accounts

To set up a management structure for account planning and to set up automatic assignment of sales representatives to accounts, you must create a territory tree for accounts.

See *PeopleSoft Enterprise Sales 8.9 PeopleBook*, “Creating Territory Trees”.

CHAPTER 4

Setting Up Planning Templates

This chapter discusses how to:

- Set up planning templates.
- Clone planning templates.

Understanding Planning Templates

Strategic account managers need to be able to capture the goals for accounts and track the attainment towards those goals. You can use the Account Plan template to create one account plan and assign it to one or multiple accounts. It reduces the need to create the same account plan over and over for multiple accounts.

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

A planning template specifies a set of data used to create a plan. If you want to create the same plan for multiple accounts, you can use a planning template to decrease the amount of data entry. A planning template can be either used for account planning or segment and audience planning.

This component defines templates keyed by setID and can be used both by Strategic Account Management and SmartViews. Strategic Account Management defines goals to be measured against set targets, whereas SmartViews use templates to report metrics. The template type differentiates whether a template is applicable to the account plan, segment plan (both for Strategic Account Management), or to the segment group (for Dashboard). Only active templates can be associated to plans or to segment groups.

Working with Planning Templates

The planning template has three main sections:

- Template Details
- Identify Goals
- Template Owners

The Template Details section captures the high level information like the template name, the plan type to which a template belongs, and whether the template is being created for segment planning, account planning, or for tracking Dashboard metrics. The plan type controls which free form text fields appear in the Details section. For example *Value Statement* and *Critical Success Factors* appear, because they are set up for the plan type of Sales. The period type specifies the length of the target's setup, while *Valid Time Frames* captures the specific time frames for which this template can be used. For example, if the plan is applicable for a specific year, the administrator can specify one time frame to prevent the user from using this template for a different year. The template has a currency code associated to it; all the goal targets that have a type of amount are entered in this currency.

To identify goals, the user enters the details of each goal such as the name of the goal, the target score expected, and how this is to be calculated (automatic or manual). Target type specifies whether the target score being specified is an amount value, quantity, percentage, or some other type. The assessment name specifies which visual status breaks are to appear (green, red, yellow, and so forth), as well as which variance indicator is associated to the associated assessment.

Template owners is the list of people who own the template, and therefore, are allowed to view or modify it.

Setting Up Planning Templates

This section discusses how to:

- Define template details.
- Define tasks.
- Define notes and attachments.
- Define objectives.
- Identify goals.
- Define template editors.

To set up planning templates, use the Planning Template (RSP_PLANNING) component.

Pages Used to Set Up Planning Templates

Page Name	Object Name	Navigation	Usage
Planning Template - Header Details	RSP_PLANNING	Set Up CRM, Product Related, Strategic Account Planning, Planning Templates	Define planning template details.
Planning Template - Tasks	RB_TSK_EDIT_GRID	Set Up CRM, Product Related, Strategic Account Planning, Planning Templates, Tasks	Define tasks for planning templates.
Planning Template - Notes	RSP_PLANNING_NOTE	Set Up CRM, Product Related, Strategic Account Planning, Planning Templates, Notes	Add notes and attachments for planning templates.
Personalize Toolbar	RB_USER_TB_PRSN	Set Up CRM, Product Related, Strategic Account Planning, Planning Templates, Personalize	Define personal toolbar settings.
Objectives	RSP_TP_OBJ_SEC	Set Up CRM, Product Related, Strategic Account Planning, Planning Templates, View All Objectives	View and edit objective descriptions.
Select Objectives	RSP_OBJ_SEL_SEC	Set Up CRM, Product Related, Strategic Account Planning, Planning Templates, Add New Objective	Select predefined objectives or create new objectives.

Defining Template Details

Access the Planning Template - Header Details page.

Planning Template

Save Refresh Add Return Notify Clone Correspondence Personalize Personalize

Template Name: SetID IPROD Status: Draft
End Date: Start Date:

Header Details Tasks Notes

▼ Template Details

*Name: Targeted Accounts Sales Plan *Status: Draft

Description: Strategic account plan for internal enterprise sales representatives to drive our yearly goal. Specific for targeted key accounts.

Usage: Account Planning Plan Type: Sales

Frequency: Annual Currency: US Dollar

Start Time Frame: 2004 Fiscal Year End Time Frame: 2004 Fiscal Year

Start Date: 01/01/2004 End Date: 12/31/2004

☐ Lock Down Changes to Plan Targets

Planning Template - Header Details page (1 of 2)

Name Enter a name for the planning template.

Status Select a status for the planning template. Values are:

Active: The template can be used to create a new plan or can be associated with a segment group. When a plan has this status, the system does not allow you to edit the goals. Only template owners who have *write with override access* can change the status back to *Draft*.

Cancelled: The planning template is canceled and cannot be used.

Completed: The validity of the template has expired so it is not available for use.

Draft: The default value when you create a planning template. You can edit the template when it has this status. You must change the status to *Active* before you can use the template.

Inactive: The planning template can no longer be used when it is inactive.

Description Enter a description for the planning template.

Usage Select the usage for the planning template. Values are *Account Planning* and *Segment/Audience Planning*.

Plan Type Select a plan type for the planning template. A user can select a plan type, which is valid for the usage specified.

Frequency Select a frequency for the planning template. Values are *Annual*, *Bi-Weekly*, *Daily*, *Monthly*, *Quarterly*, *SemiAnnual*, and *Weekly*.

Currency Select a currency for the planning template.

Start Time Frame Select the starting time period for the planning template.

End Time Frame Select the ending time period for the planning template.

Start Date Displays the date for the start time frame selected.

- End Date** Displays the date for the end time frame selected.
- Lock Down Changes to Plan Targets** If this check box is selected, the user cannot modify the target values in the plans created from this template.

Defining Objectives

Access the Planning Template - Header Details page.

Objectives

Cross Sell and Up Sell
Cross Sell and Up Sell on every sales opportunity. All Enterprise touch points should be focused in increasing our cross sell and up sell business.




Increase Revenue
Increase revenue from additional sales.


View All Objectives

Qualify Prospects
Increase effort to qualify a higher percentage of our prospects so that our leads are clean and valuable. Thus making the sales cycle tighter and the field more productive and efficient.




Increase Customer Satisfaction
Increase Customer Satisfaction across the board via timely and pleasant service, complete follow through in the sales cycle and special recognition to valuable customers.



Identify Goals

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

Details **Variance Indicator** 

Goal/Metric Name	Target Value	Type	Prorate	Calc Method	Measured By	Assessment
Increase Opportunity Revenue	150,000.00	Amount	No	Automatic	Opportunity Revenue	High Growth
Customer Meetings	1.00	Quantity	No	Automatic	Meetings	High Growth
Oppy Revenue (days)	25,000.00	Amount	No	Manual		Medium Growth
Increase Sales Leads	25.00	Quantity	No	Automatic	Number of Leads	High Growth

Template Editors Customize | Find | View All |  First  1-2 of 2  Last

Owner	Name	Phone	Title	
<input type="checkbox"/>	Terry Murphy		Field Sales Rep	
<input checked="" type="checkbox"/>	Burt Lee		Sales Manager	

Planning Template - Header Details page (2 of 2)

Note. When you select a plan type for the template, the system adds the plan type's objectives to the template.

- Add New Objective** Click this button to access the Select Objectives page. You can choose a predefined objective or create a new objective for the planning template.
- View All Objectives** Click this link to access the Objectives page and view all the objectives for the planning template. You can delete an objective on this page.

Identifying Goals

Access the Planning Template - Header Details page.

- Add New Goal** Click this button to add a new goal.
- Goal Name** Select a predefined goal or enter a goal name for the custom goal.
- Target Value** Enter the target value for the goal.
- Type** Displays the type of value for the goal. Values are *Amount*, *Percent*, *Quantity* and *Other*.

Prorate	When the value for the Prorate field is set to <i>Yes</i> , the attainment is compared with a prorated value of the target. The prorating is done based on number of days in the plan period.
Calc Method (calculation method)	Displays how the attainment for the goal is to be calculated. Possible values are <i>Automatic</i> or <i>Manual</i> .
Measured By	Displays the term name used to measure the goal.
Assessment	Select an assessment name for the goal. The assessment name determines the images that the system displays and the variance indicator.
Variance Indicator	Displays the variance indicator associated with the assessment.

Defining Template Editors

Access the Planning Template - Header Details page.

Add New Editor	Click this button to add a new template editor.
Owner	Specifies that one of the editors is the owner of the template. You do not have to specify anyone as the owner of the template. If you do not specify an owner, then anyone can change the status of the template. If you specify an owner, then only the owner or the owner's manager can change the status.

Defining Tasks

You can attach tasks to an account plan. The tasks added to the account plan for a company appear when you view the tasks for the associated company.

Access the Planning Template- Tasks page.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Defining Company Business Objects,” Managing Sales Team Tasks.

Defining Notes and Attachments

Access the Planning Template - Notes page.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Defining Company Business Objects,” Adding Notes.

Cloning Planning Templates

This section discusses how to clone a planning template.

Pages Used to Clone Planning Templates

Page Name	Object Name	Navigation	Usage
Clone Template	RB_CLONE_TXN_SEC	Set Up CRM, Product Related, Strategic Account Planning, Planning Templates Select a template and click Clone.	Define parameters for cloning planning templates.

Cloning Planning Templates

If you want to create a template that is similar to an existing template, you can clone the existing template and make modifications to the new template.

Access the Clone Template page.

Clone Template

Template Name: Targeted Accounts Sales Plan

Number of Clones **Max Clones** 50

Specify New Values

New Template

Select Data to Copy [Customize](#) | [Find](#) | **First** 1-3 of 3 **Last**

Select	
<input type="checkbox"/>	Goals
<input type="checkbox"/>	Objectives
<input type="checkbox"/>	Template Editors

Clone Template page

Number of Clones

Enter the number of templates that you want to create.

New Template

Enter a name for the cloned template.

Select

Select the Goals, Objectives, and Template Editors check boxes to copy information to the new template.

CHAPTER 5

Managing Accounts

This chapter provides an overview of accounts, assigning a team to an account, reorganizing and assigning accounts, and discusses how to:

- Access accounts.
- Assign a team to an account.
- Reorganize and reassign accounts.

Understanding Accounts

PeopleSoft Strategic Account Planning enables you to plan and manage complex accounts for your most important customers, sites, and partners. An account is a business object, which can be a company, consumer, partner, or site. An account is a business object keyed by BO_ID + Role Type ID, which is captured in the customer data model.

Understanding Assigning a Team to an Account

The ability to assign teams automatically to accounts depends on the establishment of team structures and of the assignment criteria for selecting one team from within the structure of teams. Assigning account teams works in a similar way to assigning sales reps and sales teams to leads or opportunities and is based on comparable structures of trees and territories. Once you have set up the criteria necessary to enable automated selection, the system scans through available account teams and identifies the best-qualified choice. Assignment normally occurs during creation of the account object (company, site, partner, or consumer). You may then explicitly invoke assignment and review the account team or may default team assignment as a background event during the save. The component or application class creating an object may initiate team assignment whenever there is no existing account team and if you have set a user preference for an automated assignment.

The team to be assigned is found on a territory tree as a specific territory. Both the tree to be searched and the assignment group is supplied by user preference. The assignment group's criteria with their weightings, plus the territory's specific values for each criterion, produce a score—a degree of match to the new company—for each territory. Thus, company values for fields such as region, size, or zip code are captured from the component buffer or from parameters passed from the application class. These field values are compared, via the assignment criteria, with the territory values and results weighted and summed per territory. The best score among the territories is used for selecting the optimal team. That team is then attached to the object (for example company's) account's page for account team.

Teams are automatically assigned to an account or a partner. In this instance, an account is a business object such as company, site, or consumer. A partner team is the enterprise team that manages the partner program and not a team composed of, or including partner sales reps. Like the account team, the partner team is associated with the partner object. An account or partner team is initially assigned at the creation of the company, site, consumer, or partner, and thus, is independent of an account having an account plan.

Understanding Reorganizing and Reassigning Accounts

An organization needs the ability to reorganize or reassign accounts. Generally, an account administrator is responsible for reassigning accounts. This activity could occur when one or more account managers leaves the company or their position. The account administrator has the ability to reassign a set of leads and opportunities, with each reassigned activity automatically inheriting predefined tasks of the new owner. With reassignment, there is an automatic addition of predefined team members to the lead or opportunity.

Accessing Accounts

This section discusses how to access accounts.

Pages Used to Access Accounts

Page Name	Object Name	Navigation	Usage
My Accounts	RD_ACCOUNTS	My Accounts	View accounts and add plans.

Selecting Accounts

Access the My Accounts page.

My Accounts

Personalize | My Tasks | My Calendar | Add Call Report | Add Task

View Accounts [Basic Filter](#)

SetID = IPROD

▼ Account List Customize | Find | View All | First 1-8 of 65 Last

Select	Account Name	Account Owner	Role	Primary Contact	Account Plans
<input type="checkbox"/>	Alice Anderson		Individual Consumer		Create Plan
<input type="checkbox"/>	Alice Pepper		Individual Consumer		Create Plan
<input type="checkbox"/>	American Freezer Products		Partner	Todd Couson	Create Plan
<input type="checkbox"/>	Ardross Medical		Company	Carlie Henderson	Create Plan
<input type="checkbox"/>	Arnold Ice Company	View Team	Company	Steve Collins	View Account Plans
<input type="checkbox"/>	BJ's Appliance Center		Company	Kaley Parker	View Account Plans
<input type="checkbox"/>	Bo Chavez		Individual Consumer		Create Plan
<input type="checkbox"/>	Boris May & Company		Company	Michelle Tsutsui	View Account Plans

☐ Select All / Clear All

Create Plans For Selected Accounts

My Accounts page (1 of 3)

▼ Search

View Accounts

[Basic Filter](#) [Save Search Criteria](#) [Delete Saved Search](#) [Personalize Search](#)

Role = Company
SetID = IPROD IPROD
Account Name begins with
First Name begins with
Last Name begins with
Parent Account Name begins with
Account Team Member begins with
Plan Name begins with
Plan Type begins with
Plan Team Member begins with
Industry begins with
SIC Code begins with
DUNS Number begins with

My Accounts page (2 of 3)

▼ **Show in Results**

- ☒ Accounts as Plan Owner
- ☐ Accounts as Manager
- ☐ Accounts as an Owner
- ☐ Accounts as Plan Team Member
- ☐ Accounts as Team Member
- ☐ Customers as Lead Team Member
- ☐ Customers as Oppy Team Member
- ☐ Partners as Lead Team Member
- ☐ Partners as Oppy Team Member
- ☐ Sites as Lead Team Member
- ☐ Sites as Oppy Team Member
- ☐ Accounts as Temporary Assignee
- ☐ View All Accounts

Filter Clear [Basic Filter](#) [Save Filter Criteria](#) [Delete Saved Filter](#) [Personalize Filter](#)

My Accounts page (3 of 3)

View Accounts

Select to filter the list of accounts using a new search you create or a saved search previously created.



Click the 360-Degree button to access the 360 degree view for the account.

Create Plan

Click this link to create a new plan.

View Account Plans

Click this link to view the existing plans.

Show in Results

Select the following check boxes to choose which accounts appear when you perform a search.

Note. The check boxes available in the Show in Results section depends on how you set the configurable search options.

See make sure you reference the setup pages for configurable search

Accounts as Plan Owner

Select to display accounts for which you are the plan owner.

Accounts as Manager

Select to display accounts for which you are the manager of a representative on the account team.

Accounts as an Owner

Select to display accounts for which you are the owner.

Accounts as Plan Team Member

Select to display accounts for which you are a member of the plan team.

Accounts as Team Member

Select to display accounts for which you are a team member.

Customers as Lead Team Member	Select to display customer accounts that are associated with a lead on which you are a team member.
Customers as Oppy Team Member (customers as opportunity team member)	Select to display customer accounts that are associated with an opportunity on which you are a team member.
Partners as Lead Team Member	Select to display partner accounts that are associated with a lead on which you are a team member.
Partners as Oppy Team Member (partners as opportunity team member)	Select to display partner accounts that are associated with an opportunity on which you are a team member.
Sites as Lead Team Member	Select to display site accounts that are associated with a lead on which you are a team member.
Sites as Oppy Team Member (sites as opportunity team member)	Select to display site accounts that are associated with an opportunity on which you are a team member.
Accounts as Temporary Assignee	Select to display accounts on which you are a temporary assignee.
View All Accounts	Select to display all accounts.

Assigning a Team to an Account

This section discusses how to:

- Assign a team to an account.
- Reassign representative to accounts.

Pages Used to Assign a Team to an Account

Page Name	Object Name	Navigation	Usage
Company - Account Team	RD_ACCOUNT_TEAM	My Accounts, select a company	Assign the account team for a company.
Site - Account Team	RD_ACCOUNT_TEAM	My Accounts, select a site	Assign the account team for a site.
Person (Consumer) - Account Team	RD_ACCOUNT_TEAM	My Accounts, select an individual consumer	Assign the account team for a consumer.
Partner Company - Account Team	RD_ACCOUNT_TEAM	My Accounts, select a partner	Assign the account team for a partner.

Assigning a Team to an Account

Access the Company - Account Team page.

Company

History Select One...

Save | 360 360-Degree View | Search | Add Company | Add to My Contacts | Personalize

Customer Arnold Ice Company
Contact Steve Collins
Phone Business: 001-555/664-2232(983)

Location Colma, CA, USA
Job Title
Email scollins@aice_psft.com

Summary

Account Team

Tasks

Call Reports

Plans

Notes

Address Book

Team Members

Customize | Find | View All | First 1-2 of 2 Last

Owner	Name	Contact Flag	Title	
<input checked="" type="checkbox"/>	Burt Lee	Internal	Sales Manager	
<input type="checkbox"/>	Terry Murphy	Internal	Field Sales Rep	

Add Team Members

Auto Assign Team Members

Tree Name

Assignment Group

Save | 360 360-Degree View | Search | Add Company | Add to My Contacts | Top of Page

Company - Account Team page

Click Add Team Members to add company representatives manually to the account team.

Enter a tree name and assignment group, and then click Auto Assign Team Members to have the system assign team members to the account based on the configurable account assignment criteria set up on the territory tree.

See Sales PeopleBook for more information on Territory Tree.

Reorganizing and Reassigning Accounts

If you make changes to the account territory tree, you can use the Reorganize Territories component in PeopleSoft Enterprise Sales to reorganize the account team.

If you want to reassign accounts to different account representatives, you can use the Reassign Sales Activities component in PeopleSoft Enterprise Sales.

See *PeopleSoft Enterprise Sales 8.9 PeopleBook*, “Reorganizing or Deleting a Territory Tree”.

CHAPTER 6

Creating Account Plans

This chapter provides an overview of account plans and discusses how to:

- Create account plans.
- Create plans for multiple accounts.

Understanding Account Plans

Account plans contain the specific goals and objectives that have been established to manage a company, partner, site or consumer. You can associate a template with an account plan, or manually enter the information for a plan. An account plan has three main sections:

- Plan details
Contains detailed information about the plan, including the plan type, objectives, and status.
- Goals
Specifies the quantifiable results that are expected for the account.
- Plan team
Lists the people who can view or modify the plan.

You can create a plan for an account by either accessing a company, partner, site or consumer in the Customers CRM component, Partner Profile component, or by using the My Accounts page.

Understanding Account Access

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

Plan access follows these guidelines:

- When an account and a plan on that account are unassigned, everyone with visibility to the plan can edit and change status.
- When a plan has team members, but no one is identified as an owner, everyone with visibility to the plan can edit and change status.
- When a plan has team members, and one or more is identified as the owner, everyone with visibility can edit in *Draft* status, but only the owners or owners' managers can change status from *Draft* to *Active* and back.

- When a plan has no team members, but an account team exists with no owners, everyone with visibility to the plan can edit and change status.
- When a plan has no team members, but an account team exists with one or more owners, everyone with visibility can edit in *Draft* status, but only the account owners or owners' managers can change status from *Draft* to *Active* and back.

Creating Account Plans

This section discusses how to:

- Create account plan details.
- Identify goals and their targets.
- Define the plan team.

Pages Used to Create Account Plans

Page Name	Object Name	Navigation	Usage
Account Plan	RSP_PLANNING	My Accounts, Company - Plans, Site - Plans, Person (Consumer) - Plans and Partner Company - Plans pages Click Create Plan.	Create an account plan.
Selected Accounts	RD_SEL_ACCOUNT	My Accounts, select account Click Create Plans for Selected Accounts.	Create plans for an account.

Creating Account Plan Details

Access the Account Plan page.

Account Plan History Select One...

Account Name BJ's Appliance Center **Plan Name** California Region Sales Plan
Status Draft **SetID** IPROD
Start Date 01/01/2004 **End Date** 12/31/2004

Header Details **Tasks** **Notes**

▼ **Plan Details**

Plan Type Sales **Created From Template** Targeted Accounts Sales Plan
***Plan Name** California Region Sales Plan ***Plan Status** Draft
Description California Region Sales Plan
Time Frame 2004 Fiscal Year **Currency** US Dollar
Start Date 01/01/2004 **End Date** 12/31/2004

▼ **Objectives**

Cross Sell and Up Sell
 Cross Sell and Up Sell on every sales opportunity. All Enterprise touch points should be focused in increasing our cross sell and up sell business.

Qualify Prospects
 Increase effort to qualify a higher percentage of our prospects so that our leads are clean and valuable. Thus making the sales cycle tighter and the field.

Increase Revenue
 Increase revenue from additional sales.

Increase Customer Satisfaction
 Increase Customer Satisfaction across the board via timely and pleasant service, complete follow through in the sales cycle and special recognition to.

 [View All Objectives](#)

Account Plan page

Note. If you select a template, the system automatically populates the plan with the information from the template. This information includes objectives, goals, plan name, description, and so on. Though most of the information is already populated after a template is selected, the user is allowed to add additional personal objectives and goals which may not be listed on the selected template.

Plan Type

Select a plan type for the plan. Values include *Field Service*, *Marketing and Telemarketing*, *Partner Commerce*, *Sales* and *Support*.

Select Template

Select a template to populate the data for the plan.

Plan Name

Enter a name for the plan.

Plan Status

Select a status for the plan. Values are:

Active: The plan is in use. When a plan has this status, the system does not allow you to edit the goals. Only users who act as plan owners can change the status back to *Draft*.

Cancelled: The plan is canceled and attainment does not need to be calculated.

Completed: The plan attainment has been calculated and there are no more transactions expected that would change the goal attainment.

Draft: The default value when you create a plan. You can edit the plan when it has this status.

Inactive: The plan is no longer in use and attainment does not need to be calculated.

Description	Enter a description for the plan.
Time Frame	Select the time frame for the plan.
Currency	Select a default currency for the plan that is used to show all attainment and goals that have to do with a monetary value.
Start Date	Displays the start date for the plan time frame selected.
End Date	Displays the end date for the plan time frame selected.
Add New Objective	Click this button to access the Select Objectives page. You can choose a predefined objective or create a new objective for the plan.
View All Objectives	Click this link to access the Objectives page and view all the objectives for the plan. You can delete an objective on this page.

Identifying Goals

Access the Account Plan page.

Identify Goals

Customize | Find | View All |

First 1-5 of 5 Last

Details

Variance Indicator

Goal/Metric Name	Target Value	Type	Prorate	Calc Method	Measured By	Assessment	
Increase Opportunity Revenue	145,000.00	Amount	No	Automatic	Opportunity Revenue	High Growth	
Customer Meetings	3.00	Quantity	No	Automatic	Meetings	High Growth	
Oppy Revenue (days)	20,000.00	Amount	No	Manual		Medium Growth	
Increase Sales Leads	13.00	Quantity	No	Automatic	Number of Leads	High Growth	
Sales Leads - Portfolio	25.00	Quantity	<input checked="" type="checkbox"/> Yes	Automatic	NewLeads	High Growth	

Add Goal

Plan Team Members

Customize | Find | View All |

First 1-3 of 3 Last

Owner	Name	Phone	Title	
<input type="checkbox"/>	Stu Marx	555 5551260	Sales Manager	
<input type="checkbox"/>	Luke Quincy		Sales - Lead Qualification	
<input type="checkbox"/>	Peter Martin		Sales Product Management	

First Name

Last Name

Add Team Member

Account Plan page

Add Goal	Click this button to add a new goal.
Goal/Metric Name	Select a goal name for the plan.
Target Value	Enter the expected value for the goal.
Type	Displays the type of value for the goal. Values are <i>Amount</i> , <i>Percent</i> , <i>Quantity</i> , and <i>Other</i> .
Prorate	This should be set to <i>Yes</i> when the attainment needs to be compared with a prorated value of the target. The prorating is done based on number of days in the plan period. For example, if the target is to increase revenue by three million dollars in 90 days, and the attainment is being measured

on the 30th day of the plan, the prorated target appears as one million dollars and the assessment appears based on this value.

Calc Method(calculation method)

Displays how the attainment for the goal is to be calculated. Values are *Manual* or *Automatic*. If Automatic is specified, select a term to use for the calculation.

See [Chapter 8, “Measuring the Attainment of Plan Goals,”](#) page 51.

Measured By

Displays the term name used to measure the goal.

Assessment

Select an assessment name for the goal. The assessment name determines the image that the system displays and the variance indicator.

Variance Indicator

Displays the variance indicator associated with the assessment.

Copied From Template

Displays whether the system copied the goal from a template.

See [Chapter 4, “Setting Up Planning Templates,”](#) page 21.

Defining the Plan Team

Access the Account Team page.

The screenshot displays the 'Company' page for 'BJ's Appliance Center'. The 'Account Team' tab is selected, showing a list of team members. The page includes a 'History' dropdown, a 'Personalize' link, and a 'Summary' tab. The team members list has columns for Owner, Name, Contact Flag, Title, and a delete icon. Below the list is an 'Add Team Members' button. At the bottom, there are fields for 'Tree Name' (WORLD) and 'Assignment Group' (ACCT_ASSGN).

Owner	Name	Contact Flag	Title
<input type="checkbox"/>	Stu Marx	Internal	Sales Manager
<input type="checkbox"/>	Luke Quincy	Internal	Sales - Lead Qualification
<input type="checkbox"/>	Ian Steward	Internal	Sales Administration
<input type="checkbox"/>	Steve Moss	Internal	Sales Manager

Company - Account Team page

Add Team Member

Click this button to add a team member to the plan.

Owner

Specifies that one of the team members is the owner of the plan. You do not have to specify anyone as the owner of the plan. If you do not specify an owner, then anyone who can access the plan as per dataset security can change the status of the plan. If you specify one or more owners, then only the owners or the owners' manager can change the status.

Creating Plans for Multiple Accounts

This section discusses how to create plans for multiple accounts.


Pages Used to Create Plans for Multiple Accounts



Page Name	Object Name	Navigation	Usage
My Accounts	RD_ACCOUNTS	My Accounts	View accounts and add plans.
Selected Accounts	RD_SEL_ACCOUNT	My Accounts, select multiple accounts Click Create Plans for Selected Accounts.	Create plans for multiple accounts.

Creating Plans for Multiple Accounts


Access the Selected Accounts page.


Selected Accounts

Customize | Find | 




First  1-2 of 2  Last


Account Name	Parent Name
Angel Co.	
Coen Food Service	

Plan Type 

Select Template 

Plan Name

Description   

Time Frame 

Frequency

End Date

Select Plan Status

☒ Create Plans in Draft Status

☐ Activate Automatically

Create Plans

Cancel

Selected Accounts page

Note. You must select accounts with the same role and setID to create plans for multiple accounts.

- Plan Type

Select a plan type for the plan.
- Select Template

Select a template to populate the data for the plan.
- Plan Name

Enter a name for the plan.
- Description

Enter a description for the plan.
- Time Frame

Select the time frame for the plan.

Start Date	Displays the start date for the plan time frame selected.
End Date	Displays the end date for the plan time frame selected.
Select Plan Status	Select Create in Draft Status to create the plan with a status of <i>Draft</i> or Activate Automatically to create the plan with a status of <i>Active</i> .

CHAPTER 7

Creating Segment and Audience Plans

This chapter provides an overview and discusses how to:

- Create segment plans.
- Roll over segment plans.
- Create audience plans.
- Roll over audience plans.

Understanding Segment and Audience Plans

You can create plans for a group of contacts by creating a plan for an audience. You can rollover that plan and allocate the target values to the companies that the contacts work for. Similarly, you can create plans for a segment. The difference between a segment and an audience is that segments can contain a hierarchy of segments that at the bottom level finally contain people. When a segment plan is rolled over from the segment to the child segment groups, segment plans are created for those subsegments. When a segment plan is rolled over to the final level, it creates plans for the company for which those people work. For example, if a segment contains ten people who work for five distinct companies (two people for each company) it will create five account plans for those five companies. It does not create ten plans, one for each person. Plans can be rolled over more than once, but all the plans created from the previous rollover will be set to Cancelled.

Segment plans contain the specific goals for a segment of customers, consumers' sites, or partners. You can use PeopleSoft Marketing to create segments. You can associate a plan template with the segment, or manually enter the plan information. A segment plan can be created only for published segments. A segment plan has three main sections:

- Plan details
Contains detailed information about the plan, including the plan type, plan start, and end date, high-level objectives of the plan, and status.
- Goals
Specifies the quantifiable results that are expected for the account.
- Plan team
Lists the people who can view or modify the plan.

You can create a plan for a segment by accessing a segment in the Manage Audiences component.

See Also

PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook, “Using Audiences,” Creating and Updating Audiences

PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook, “Using Audiences,” Creating and Updating Segments

PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook, “Using Audiences,” Creating Audience and Segment Plans

Creating Segment Plans

This section discusses how to create segment plans.

Pages Used to Create Segment Plans

Page Name	Object Name	Navigation	Usage
Segment - Plans	RA_LIST_PLANS	Marketing, Manage Audiences, select a segment, Plans	View plans for a segment.
Segment Plan	RSP_PLANNING	Click Create Plan on the Segment - Plans page.	Create a segment plan.

Creating Segment Plans

Access the Segment Plan page.

Segment Plan

Save Refresh Search Return Notify Correspondence My SmartView Personalize

Segment Name Net Amount Customer Orders **Plan Name** Drive WalkIn SR2000 Sales
Status Active **SetID** IPROD
Start Date 01/01/2004 **End Date** 12/31/2004

Header Details Tasks Notes

Plan Details

Objectives

Identify Goals Customize Find View All First 1 of 1 Last

Details Variance Indicator

Goal/Metric Name	Target Value	Type	Prorated Target	Attainment	Variance %	Prorate
	0.00		0.00	0.00		No

Calculate Attainments View in Currency

Rollover Plan

Last Calculated **Last Rollover**

Segment Plan page

The Segment Plan page is identical to the Account Plan page except that it has the Rollover Plan button. The system displays this button when you change the status of the plan to *Active*. Click this button to roll over the segment plan to child segments. The Rollover Plan button appears when the current segment contains any child segments.

See [Chapter 6, “Creating Account Plans,” Creating Account Plans, page 36](#).

Rolling Over Segment Plans

This section discusses how to roll over a segment plan to child segments.

Page Used to Roll Over Segment Plans

Page Name	Object Name	Navigation	Usage
Rollover Segment Plan to Child Segments	RSP_TP_ROLLOVR_SEC	Click the Rollover Plan button from the Segment Plan page.	Roll over a segment plan.

Rolling Over Segment Plans

Access the Rollover Segment Plan to Child Segments page.

Rollover Segment Plan to Child Segments

Plan Name Lead Effectiveness - Mktg 04
Segment Name All CA Customers

Allocate Goal Targets

Customize | Find | View All

First 1-3 of 3 Last

Goal Name	Target Value	Target Type	Allocation Method
Lead Total for Mktg	25.00	Amount	
Average Executed Mktg Activities	3.00	Quantity	
Marketing Conversion	2.00	Percent	

Expand All | Collapse All

Find

First 1-3 of 3 Last

☐ All CA Customers- (57)
☒ CA Companies- (54)
☒ CA Consumers- (3)

☐ Select All / Clear All

Select Plan Status

☒ Create Plans in Draft Status

☐ Activate Automatically

Create Plans Cancel

Rollover Segment Plan to Child Segments page

Allocation Method

Specify how to allocate the target value among the child segments. Values are:

*# of Accounts in Segments:*The target value is assigned to a segment based on number of accounts it contains. For example, we need to distribute 3 million dollars target among two segments. The first segment has 100 accounts and second segment has 200 accounts. In this scenario, the target value for first segment will be allocated as 1 million dollars and for second segment, it will be allocated as 2 million dollars.

*# of Selected Segments:*The target value will be distributed by number of selected segment. This distribution depends on the tree level on which the segment resides. To distribute targets from root node of the tree, only the first level of selected segments are considered. For example, if the current (root) segment has three child segments and only two are selected, each of the selected segments will be allocated a target value of 50%. Similar target distribution logic is implemented when allocating targets from first level to second level and so on.

Copy as is: This method copies the target value (as it appears on current plan) to the new plan.

Set Target to 0: This method sets the target value as zero on the new plan. A user may select this value if the purpose is to get the new plan created to enable the user to view that plan and set the target values manually.

- Select Plan Status

Select Create Plans in Draft Status to create the plans with a status of *Draft*, or select Activate Automatically to create the plans with a status of *Active*.
- Create Plans

Click this button to create plans for the child segments.

Creating Audience Plans

This section discusses how to create segment plans.

Pages Used to Create Audience Plans

Page Name	Object Name	Navigation	Usage
Audience - Plans	RA_LIST_PLANS	Marketing, Manage Audiences, select an audience, Plans	View plans for an audience.
Audience Plan	RSP_PLANNING	Click Create Plan on the Audience - Plans page.	Create an audience plan.

Creating Audience Plans

Access the Audience Plan page.

Audience Plan

Save

Refresh

Return

Notify

Correspondence

My SmartView

Personalize

Audience Name

All Partners

Plan Name

Platinum Sales Plan

Status

Active

SetID

IPROD

Start Date

01/01/2004

End Date

12/31/2004

Header Details

Tasks

Notes

Plan Details

Objectives

Identify Goals

Customize

Find

View All

First

1 of 1

Last

Details

Variance Indicator

Goal/Metric Name	Target Value	Type	Prorated Target	Attainment	Variance %	Prorate
Partner Leads	6.00	Quantity	0.00	0.00		Yes

Calculate Attainments

View in Currency

Rollover Plan

Last Calculated

Last Rollover

Plan Team Members

Customize

Find

View All

First

1-3 of 3

Last

Owner	Name	Phone	Title
<input type="checkbox"/>	Terry Murphy		Field Sales Rep
<input checked="" type="checkbox"/>	Burt Lee		Sales Manager
<input type="checkbox"/>	Eddie Chen		Enterprise Channel Manager

First Name

Last Name

Add Team Member

Audience Plan page

The Audience Plan page is identical to the Account Plan page except that it has the Rollover Plan button. The system displays this button when you change the status of the plan to *Active*. Once an audience plan is in active stage, it can be rolled over to the member accounts. The Rollover Plan button appears only when the current audience contains any member accounts. The system captures the rollover date and the user who rolled over the plan on the current audience plan.

The plan can only be rolled over to the member accounts which are in the appropriate setID and have a role valid for the plan type. An audience plan can be rolled over multiple times as long as there are member accounts that don't already have the plan existing. The user will also be provided with the option to cancel the existing plan as long as they have appropriate access to the plan as per the dataset and edit control security.

See Chapter 6, "Creating Account Plans," Creating Account Plans, page 36.

Rolling Over Audience Plans

This section discusses how to roll over an audience plan to member accounts.

Page Used to Roll Over AudiencePlans

Page Name	Object Name	Navigation	Usage
Rollover Audience Plan to Member Accounts	RSP_TP_ROLLOVR_SEC	Click the Rollover Plan button from the Audience Plan page.	Roll over an audience plan.

Rolling Over Audience Plans

Access the Rollover Audience Plan to Member Accounts page.

Rollover Audience Plan to Member Accounts

Plan Name Platinum Sales Plan

Audience Name All Partners

Allocate Goal Targets Customize | Find | View All | First 1 of 1 Last

Goal Name	Target Value	Target Type	Allocation Method
Partner Leads	6.00	Quantity	

Audience Members Customize | Find | View All | First 1 of 1 Last

Select	Account Name
<input type="checkbox"/>	Cool Solutions

☐ Select All / Clear All

Select Plan Status

☒ Create Plans in Draft Status ☐ Activate Automatically

Create Plans Cancel

Rollover Audience Plan to Member Accounts page

Allocation Method

Specify how to allocate the target value among the member accounts. Values are:

of Accounts in Audience: The goal target will be evenly distributed and then applied to the selected members when creating new plan. For example – there are ten member accounts in the audience and the manager selects only two of them to create the plan and eight other accounts are not selected. The goal target is to increase revenue by 10 million dollars which means that from each account we want to get one million dollars revenue. So, the two plans which will be created will be allocated a target value of one million dollars each.

of Selected Accounts: The goal target will be distributed based on newly select accounts and members who already have the plan. This allocation method should be used when the manager wants to target few specific accounts in the audience. For example – there are ten member accounts in the audience and the manager selects only two of them to create the plan and three members already have the plan. The goal target is to increase

revenue by 10 million dollars which means that from each account we want to get two million dollars revenue. So, the two plans which will be created will be allocated a target value of two million dollars each.

Copy as is: This method is used primarily for allocating targets which are of *Percent* type. For example, the purpose of a goal is to increase customer satisfaction to 80 percent, so it should be met across the board and not just for one member.

Set Target to 0: This allocation method is used when the user wants to create the plan but wants to drill into the newly created plan and set the target manually.

Select Plan Status

Select Create Plans in Draft Status to create the plans with a status of *Draft*, or select Activate Automatically to create the plans with a status of *Active*.

Create Plans

Click this button to create plans for the member accounts.

CHAPTER 8

Measuring the Attainment of Plan Goals

This chapter provides an overview of goal attainment and discusses how to:

- Establish plan goal metrics.
- Measure the attainment of plan goals.

Understanding Measurement of Plan Goals

In order to measure the success of a strategic plan, each strategy must be based on measurable goals and objectives that help you track the progress your team and partners are making in the account.

Strategic Account Planning delivers configurable templates for setting the account strategy. Sales, marketing, and service managers can tailor these plan templates to track performance objectives for each plan. Each plan template contains suggested goals, or you can create new performance indicators that are specific to your business needs.

Metrics can be defined once and deployed across all account plans. Both internal and third-party data sources can be leveraged for metric calculations. For example, you can use market share data to track your competitive position or import survey results to measure customer satisfaction.

Dashboard views make it easy to identify specific issues to address in the account. You can track performance in individual accounts or roll up key metrics to see aggregate performance in a single view. For each metric, account managers can compare actual versus target goal attainment and adjust the customer strategy in real time.

Establishing Plan Goal Metrics

This section discusses how to establish the metrics for goals for a plan.

To establish goal plan metrics:

1. Establish a quantifiable goal.
2. Establish a target value for the goal.
3. Define the value type.
4. Define the attainment calculation method.
5. Determine if the target value should be prorated.

Pages Used to Establish Plan Goal Metrics

Page Name	Object Name	Navigation	Usage
Account Plan	RSP_PLANNING	Click a plan from My Accounts, Company - Plans, Site - Plans, Person (Consumer) - Plans and Partner Company - Plans pages.	Enter goal metrics to measure goal attainment.
Strategic Plan Term Selection	RSP_TP_EOCF_SEC	Click Select Term on My Accounts page.	Select a term to measure the calculation of attainment.

Entering Goal Metrics

Access the Account Plan page.

Account Plan History Select One...

Save Refresh Return Notify Next In List Correspondence Personalize

Account Name BJ's Appliance Center **Plan Name** Targeted Account Service Plan
Status Draft **SetID** IPROD
Start Date 01/01/2004 **End Date** 12/31/2004

Header Details Tasks Notes

Plan Details Objectives

Identify Goals Customize Find View All First 1-3 of 3 Last

Details Variance Indicator

*Goal/Metric Name	Target Value	Type	*Prorate	Calc Method	Measured By	Assessment
Number of Contacts	10.00	Amount	No	Manual		High Growth
Number of High Cases	10.00	Quantity	No	Automatic	Number of Priority <High> Cases	Low Growth
	0.00		No	Automatic	Select Term	

Add Goal

Account Plan page

Calc Method(Calculation Method) Select Manual to enter the goal values. Select Automatic to select the strategic plan term.

See [Chapter 6, "Creating Account Plans,"](#) page 35.

Selecting the Attainment Measurement

Access the Strategic Plan Term Selection page.

Strategic Plan Term Selection

Plan Name

Goal/Metric Name

[Switch to Search Mode](#)

Select Subject Area

360 Degree View

Agreement

Call Center

Change Management

Client Manager

Correspondence Template Terms

Customer History

Customer Scorecard KPIs

FieldService

Financial Accounts

Individuals

Installed Product

Leads

Marketing

Order Capture

Order History

Organizations

Policy and Claim Presentment

Portfolio Management

Financial Metrics

Marketing Metrics

PRM Metrics

Sales Metrics

Product Registration

Quality

Sales

Service

Services Plus

Solutions

Strategic Account Planning

Sales Metrics

Support Metrics

Find | View All

First 1-7 of 7 Last

Select Term

Compare Opportunity Revenue Amount Year Over Year

Opp Revenue PCT Change by BO/Role Days Over Days

Increase Sale of Product : <PRODUCT_ID>, Unit Of Measure <UNIT_OF_MEASURE>

Number of Leads

Compare Opportunity Revenue Amount By Days

Opportunity Revenue

Opp Revenue PCT Change by BO/Role Year Over Year

Strategic Plan Term Selection page

Select a term to measure the calculation of attainment.

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

Calculating Goal Attainments

This section discusses how to:

- Calculate attainments for one plan.
- Calculate attainments for multiple plans.

Pages Used to Calculate Goal Attainment

Page Name	Object Name	Navigation	Usage
Account Plan	RSP_PLANNING	Click a plan from My Accounts, Company - Plans, Site - Plans, Person (Consumer) - Plans and Partner Company - Plans page.	Calculate the attainment of goals for one plan.
Account Plan	RSP_PLANNING	Set Up CRM, Product Related, Strategic Account Planning, Auto Calc Plan Attainments	Calculate the attainment of goals for multiple plans.

Calculating Attainments for One Plan

Access the Account Plan page.

Note. The status of the plan must be *Active* before you can calculate attainment.

Identify Goals

Customize | Find | View All

First 1-4 of 4 Last

Details

Variance Indicator

Goal/Metric Name	Target Value	Type	Prorated Target	Attainment	Variance %	Prorate
Increase Opportunity Revenue	150,000.00	Amount	150000.00	0.00	-100.00	No
Customer Meetings	1.00	Quantity	1.00	2.00	100.00	No
Oppy Revenue (days)	25,000.00	Amount	25000.00	0.00	-100.00	No
Increase Sales Leads	25.00	Quantity	25.00	0.00	-100.00	No

Calculate Attainments

View in Currency

Last Calculated

04/26/2004 11:10AM

BLEE

Account Plan page

Target Value

Displays the target value assigned to the goal.

Type

Displays the type of value defined by the Target Value. Options are *Amount*, *Percent*, *Quantity*, and *Other*.

Prorated Target

Displays the target value with proration applied if applicable.

Attainment

Displays the actual attainment for the goals.

Note. If the goal is a manual goal, you enter a number for the goal in the Attainment field.

Variance % (variance percentage)

Displays the percentage difference between the target and attainment.

Prorate

Displays whether proration is to be applied to the target value.

Calculate Attainments

Click this button to calculate attainments.

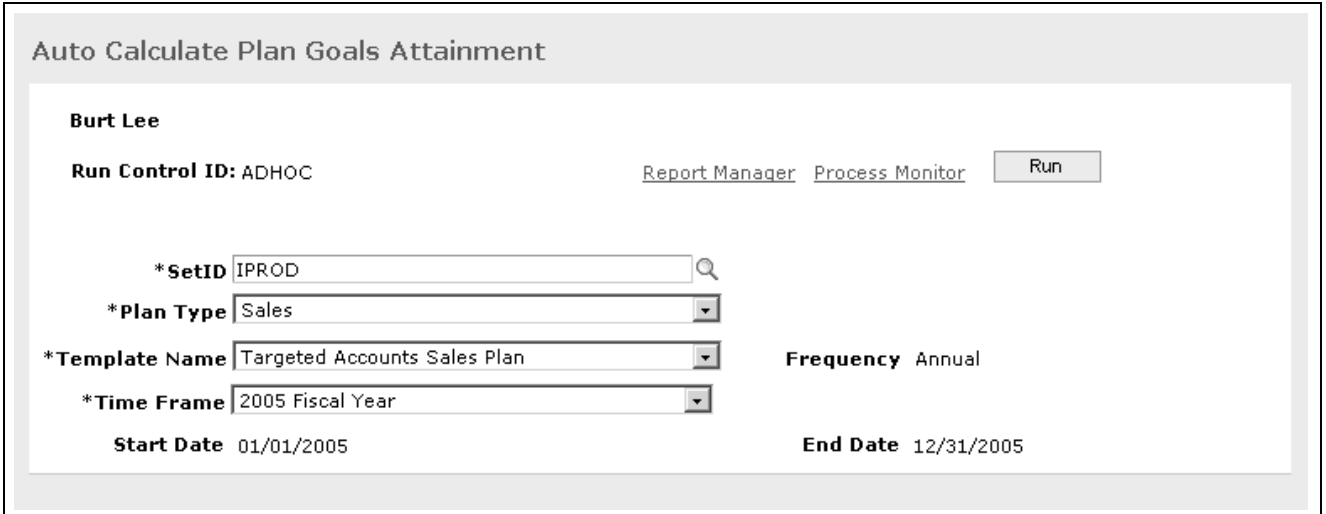
View in Currency

Select a currency to use for all monetary amounts displayed on the page.

Calculating Attainments for Multiple Plans

Based on specified parameters, the system selects matching plans which the current user has access to and calculates attainment for each of the matching plans. The last calculated date for each of these plans is updated.

Access the Auto Calculate Plan Goals Attainment page.



Auto Calculate Plan Goals Attainment

Burt Lee

Run Control ID: ADHOC [Report Manager](#) [Process Monitor](#)

***SetID** IPROD

***Plan Type** Sales

***Template Name** Targeted Accounts Sales Plan **Frequency** Annual

***Time Frame** 2005 Fiscal Year

Start Date 01/01/2005 **End Date** 12/31/2005

Auto Calculate Plan Goals Attainment page

Plan Type	Select a plan type. The system calculates goal attainment for plans of this type.
Template Name	Select a template name. The system calculates goal attainment for plans that use this template.
Time Frame	Select a time frame for calculating attainments.

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

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	Azerbaijani Manat
BAD	Dinar
BAM	Convertible Marks
BBD	Barbados Dollar
BDT	Taka
BEC	Convertible Franc
BEF	Belgian Franc
BEL	Financial Belgian Franc
BGJ	Lev A/52
BGK	Lev A/62
BGL	Lev
BGN	Bulgarian LEV
BHD	Bahraini Dinar
BIF	Burundi Franc
BMD	Bermudian Dollar

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

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

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

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

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

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

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

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

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

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	<p>In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.</p>

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

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

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

delivery method	<p>In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.</p> <p>In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.</p>
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
event	<p>A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.</p> <p>In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.</p>
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

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

LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new

	laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastings are special expressions included in SQL string literals. The metastings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

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

price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

	<p>on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.</p>
record output VAT flag	<p>Abbreviation for <i>record output value-added tax flag</i>.</p> <p>See <i>record input VAT flag</i>.</p>
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.

run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

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

	than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

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

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