PeopleSoft®

PeopleSoft Enterprise CRM 8.9 Mobile Applications PeopleBook

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PeopleSoft Enterprise CRM 8.9 Mobile Applications 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.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

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

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

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

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

Description — Enter up to 30 characters of text.

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

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

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

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

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

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

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

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

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

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

Short Description
: Enter up to 15 characters of text.

PeopleSoft Enterprise CRM Mobile Applications Preface

This preface discusses:

- PeopleSoft Enterprise CRM application fundamentals.
- Automation and configuration tools.
- Services foundation.
- PeopleTools documentation.

Note. All information found in this PeopleBook is applicable to PeopleSoft Enterprise CRM mobile applications.

PeopleSoft Enterprise CRM Application Fundamentals

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

The *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across thePeopleSoft Enterprise CRM product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire PeopleSoft Enterprise CRM system, 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.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook

Automation and Configuration Tools

The *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to the application 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 Enterprise CRM workflow, Active Analytics Framework (AAF), business projects, and scripts.

- Configuration tools.

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

- Knowledge management.

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

Services Foundation

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

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

- Entitlement management.

  This part discusses how solution management enables users to establish a set of predefined solutions that call center agents and field service technicians use to resolve customer problems.

- Transaction Billing Processor Integration.

  This part discusses how PeopleSoft Transaction Billing Processor enables PeopleSoft Enterprise FieldService, PeopleSoft Enterprise Support, and PeopleSoft Enterprise Order Capture to integrate with PeopleSoft Billing and PeopleSoft General Ledger through the use of the PeopleSoft Contracts architecture. Also covered is how this integration enables PeopleSoft Enterprise CRM users to bill and book revenue for recurring, one-time, and on demand service.

- Environmental Systems.

  This part covers the Research Institute (ESRI) integration. The integration with ESRI, a mapping software, enables users to view the location of reported cases and the location of field service activities through the Map Dashboard.

PeopleTools Documentation

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

PART 1

Getting Started with PeopleSoft Enterprise CRM Mobile Applications

CHAPTER 1

Getting Started with PeopleSoft Enterprise CRM Mobile Applications

This PeopleBook describes PeopleSoft Enterprise Customer Relationship Management (CRM) mobile applications: PeopleSoft Enterprise Mobile Order Capture, PeopleSoft Enterprise Mobile Sales, PeopleSoft Enterprise Mobile FieldService, PeopleSoft Enterprise Mobile Account Planning, and PeopleSoft Enterprise Mobile Sales for WAP Phones.

This chapter discusses:

- PeopleSoft Enterprise CRM mobile applications.
- PeopleSoft Enterprise CRM mobile applications business processes.
- PeopleSoft Enterprise CRM mobile applications implementation.

PeopleSoft Enterprise CRM Mobile Applications Overview

PeopleSoft mobile applications provide mobile functionality for order capture, sales, and field service.

Through PeopleSoft Mobile Agent, you can download information from a database server to a mobile device. Mobile sales professionals can access customer information from the PeopleSoft Enterprise Sales database and display it on Wireless Application Protocol (WAP) enabled devices.

Note. This book focuses on the set up and usage of mobile functionality and does not discuss core PeopleSoft Enterprise CRM setup or usage. Review the references that are provided in each chapter before beginning the implementation.

PeopleSoft Enterprise CRM Mobile Business Processes

PeopleSoft Enterprise mobile applications provide these business processes:

- Mobile order capture.
- Mobile sales.
- Mobile account planning.
- Mobile field service.

We discuss these business processes in the business process chapters in this PeopleBook.

PeopleSoft Enterprise CRM Mobile Applications Implementation

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

Other Sources of Information

In the planning phase of implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface of the *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook,* with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise Setup Manager for Customer Relationship Management 8.9

PART 2

Disconnected PeopleSoft Enterprise CRM Mobile Applications

CHAPTER 2

Working with PeopleSoft Enterprise CRM Mobile Applications

This chapter provides an overview of mobile device initialization and discusses how to:

- Initialize mobile devices.
- Perform synchronizations.
- View errors and notifications.

Understanding Mobile Device Initialization

Before you can initialize and begin using the PeopleSoft Enterprise Customer Relationship Management (CRM) mobile application, install PeopleSoft Mobile Agent on the mobile device.

See *PeopleTools Mobile Agent PeopleBook.*

When you initialize a mobile device, application metadata and business data are installed for the first time. Although PeopleSoft Mobile Agent may be installed on the device by an administrator, only the user of Mobile Agent (defined by user ID and user role) can synchronize application metadata and business instance data from the server to the device.

Note. Instance data is synonymous with business data, and metadata is synonymous with application metadata.

Initializing Mobile Devices

Initializing a mobile device first requires a bootstrap synchronization. To perform a bootstrap synchronization:

1. Install PeopleSoft Mobile Agent software on the device.
2. Perform a bootstrap synchronization.
   a. Verify that the PSMOBILE.INI file in the WINNT folder identifies the server you will use to transfer PeopleSoft Enterprise Mobile Sales data between the server and the remote device when you launch the application.

      This URL should be identified in the SyncGateway parameter. (For example, SyncGateway=http://psuser110200/SyncServer).
   b. Launch PeopleSoft Mobile Agent by selecting Start, Programs, PeopleSoft Mobile Agent, Start PeopleSoft Mobile Agent.

      If PeopleSoft Mobile Agent is already running on the local machine, you can stop the application by selecting Start, Programs, PeopleSoft Mobile Agent, Stop PS Mobile Agent.

c. Select Start, Programs, PeopleSoft Mobile Agent, PS Mobile Application.

If the device has not previously been initialized, the PeopleSoft Mobile Device Bootstrap page appears.

d. Sign in to the application with the user ID and password.

The user ID, such as the delivered user ID and password, FLDSLSREP, identifies the appropriate application metadata (application definitions) and instance data (business data) to be downloaded to the device. When you sign in, the synchronization begins, and you must wait for this process to complete before launching the application. Subsequent synchronizations do not require a complete synchronization of both metadata and instance data, but only upload changes from the device to the server and reconcile changes between the device and server.

e. Click Synchronize.

The PeopleSoft Mobile Synchronization Results page appears, showing the progress of the bootstrap synchronization.

When complete, check for alerts or notifications.

Both the PeopleSoft Mobile Agent and the mobile application should now be running. You are now ready to use the mobile application.

Understanding Synchronization Options

After device initialization, you have three synchronization options:

- Upload changes
- Update business data
- Update applications

Synchronize with the mobile device connected and logged on to the company network server. You can be connected directly to the local area network, through dial-up or through the internet.

See Also

PeopleTools PeopleBook: PeopleTools Mobile Agent

Performing Synchronization

This section discusses how to:

- Upload changes only.
- Perform update business data.
- Update applications.

Uploading Changes Only

Use this option to update changes from the mobile device to the server. Data that is received from the server is limited to error responses to your update requests, and any server-side changes that are made to objects that you updated. To receive updates to all of your data, perform Update Business Data.

To upload changes:

1. Select PeopleSoft Mobile, Synchronization, Upload Changes.

   The Upload Changes page appears.

2. Enter the user ID and password.
3. Click Synchronize.

   The PeopleSoft Mobile Synchronization Results page appears, showing the progress of the synchronization.

4. When it's complete, check for synchronization errors and notifications.

Performing a Full Synchronization to Update Business Data

Use this option to reconcile the business data on the device with the data on the server. All of the updates are first uploaded to the server for processing, and any errors are returned to the device. After uploading changes, any modified or new data on the server is downloaded onto the device. If data that you modified on your device generates an error, and the same data was modified on the server, the new data is not retrieved until you reconcile the errors. To send only your changes to the server, upload changes only.

To perform a full synchronization:

1. Select PeopleSoft Mobile, Synchronization, Update Business Data

   The Update Business Data page appears.

2. Enter the user ID and password.
3. Click Synchronize.

   The PeopleSoft Mobile Synchronization Results page appears, showing the progress of the synchronization.

4. When it's complete, check for synchronization errors and notifications.

Updating Applications

With this option, you first attempt to upload all changes from the device. If any errors occur during this upload, the Update Applications option terminates. Resolve all errors prior to performing the Update Applications option again. If the upload is successful, the Update Applications option removes all data from the device and retrieves the current version of your business applications. If your applications load successfully, a full synchronization is performed to load business data onto the device. The Update Applications option is irreversible.

To update applications:

1. Select PeopleSoft Mobile, Synchronization, Update Applications.

   The Update Applications page appears.

2. Enter the user ID and password.
3. Click Synchronize.

   The PeopleSoft Mobile Synchronization Results page appears, showing the progress of the synchronization.

4. When it's complete, check for synchronization errors and notifications.

Viewing Errors and Notifications

After initialization or any other synchronization, you can view errors and notifications.

To view errors:

1. Select Alerts, Error List.
2. Click the ID link of any error to view additional information.
3. You have two options: click the Delete Error link to remove the data change that caused the synchronization to fail, or use information that the message provides to correct the error.

   You can try synchronizing again.

To view notifications:

1. Select Alerts, Notifications.
2. View notifications that were sent to you during synchronization.

See Also

PeopleTools PeopleBook: PeopleTools Mobile Agent

Reviewing and Correcting Synchronization Errors

After viewing synchronization errors, you can correct errors, depending on the nature of the error and the information that is provided:

If the error is related to a system problem, such as an invalid password or the synchronization server being available, attempt the synchronization again. If the error is related to a conflict with a server-side change (after evaluation by the conflict resolution rules that are defined for the application), delete the error or change and accept the new data. If the error is related to a business-rule violation, the text of the message should contain enough information to identify the changes that are required. Correct the errors and then attempt the synchronization again.

Because business-rule validation occurs only during synchronization, be careful to enter only valid values when creating, editing, or changing business information.

See Also

PeopleTools PeopleBook: PeopleTools Mobile Agent

CHAPTER 3

Setting Up Data Distribution for a Mobile Device

This chapter provides an overview of data distribution and discusses how to:

- Define mobile customer options.
- Define mobile attachment rules.
- Set up out-of-date detection.

Understanding Data Distribution

Mobile devices may have limited processing power, storage capacity, and display space. You can limit the range and quantity of data that is passed to the mobile device by specifying a data distribution method.

Data distribution for mobile applications:

- Implements security.
- Filters the data that is downloaded to the mobile device.

Depending on the business objects, PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) mobile applications utilize the distribution rules and spider out methods to distribute data from the database to the mobile device.

Distribution Rules Defining data distribution rules creates structured query language statements that run during synchronization to select the data set that is delivered to the mobile device. The result of data distribution rules is a set of data that is appropriate to the user's roles. The data set may differ depending on the mobile device.

Spider Out The result of spidering are rows of data can be required for the mobile device in addition to those selected by the OnSelect event. For example, a contact list on a mobile device includes three people: two from the U.S. states of New York and New Jersey and one from the Canadian province of Ontario. The OnSelect event for state calls for only states or provinces that are in the U.S. Using spidering, the Sync Server retrieves all the U.S. states, but it also retrieves Ontario because Ontario is already present on the mobile device.

Objects	Data Distribution Method
Company (RDM_COMPANY_2)	• Data Distribution Rules • Spider Out— referenced by transactions such as lead, opportunity, or relationship between a contact and company, and so on. So companies will be downloaded along with those leads, opportunities, contacts, and so on.
Person (RDM_PERSON) Consumer (RDM_PERSON_CI)	• Data Distribution Rules. • Spider Out from company and consumer as well as from reference by other transactions such as contact of a Lead.
Site (RDM_SITE_2)	• Data Distribution Rules. • Spider Out from company and consumer as well as from reference by transactions.

Relationship Component (BO_REL_MOBILE)

The Relationship component sources the data in the various components' relationship viewers.

Using distribution rules, you can restrict the amount of relationship instances that are downloaded to the mobile device. If the distribution rules are too restrictive, then only a small amount of relationships will be downloaded. Conversely, if the rules are too broad, then performance may suffer as too many transactions are downloaded to the device during synchronization. There is an option in the mobile installation options to spider out from the customer components. This will enable automatic spider-out of relationships one level deep from each customer. This is one mechanism to supplement or replace data distribution rules.

See Also

PeopleTools PeopleBook: PeopleSoft Enterprise Components

PeopleTools PeopleBook: PeopleTools Mobile Agent

PeopleTools PeopleBook: PeopleCode Reference

Defining Mobile Customer Options

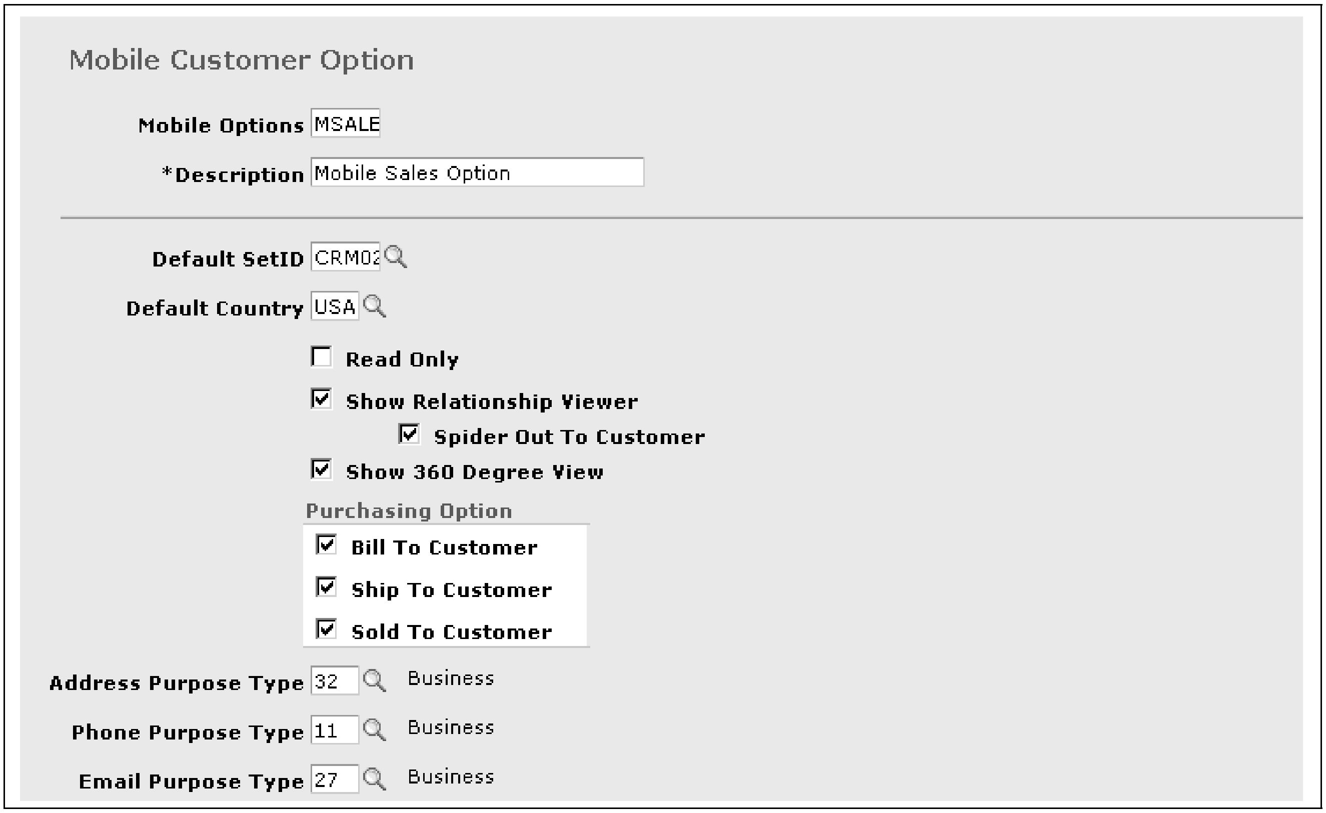
In PeopleSoft Enterprise CRM, you can define the options for using the PeopleSoft Enterprise CRM Customer Data Model for the mobile application. The PeopleSoft Enterprise CRM Customer Data Model maintains entries and relationships among company, site, contact, consumer, worker, and other business entities.

Page Used to Define Mobile Customer Options

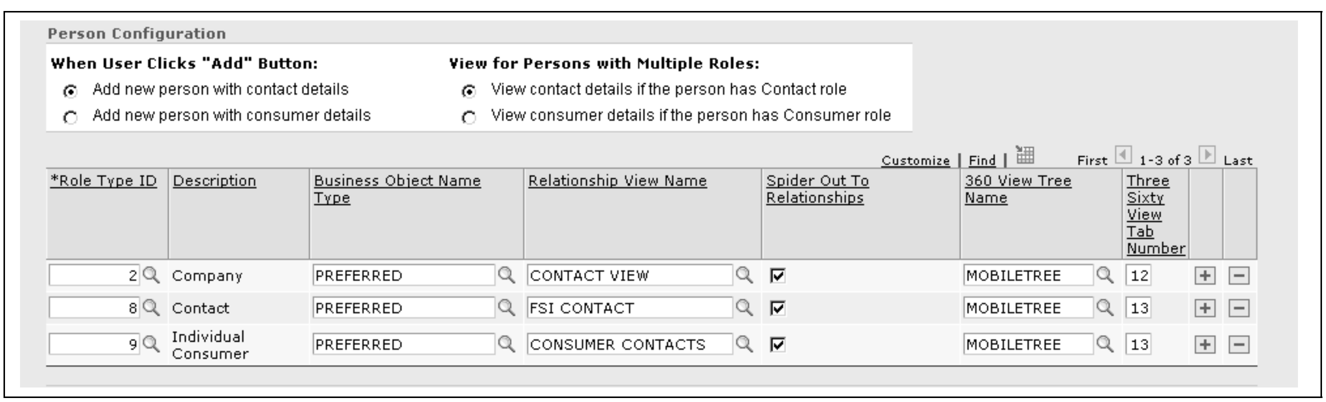
Page Name	Object Name	Navigation	Usage
Mobile Customer Option	RDM_MOBILE_DFLT	Set Up CRM, Install, Mobile, Mobile Customer Option	Define the data distribution methods that are used to display the Relationship Viewer and the 360–Degree View on mobile devices.

Defining Mobile Customer Options

Access the Mobile Customer Option page.



Mobile Customer Option page (1 of 2)



Mobile Customer Option page (2 of 2)

Default SetID Filters the customer data.

Show Relationship Viewer Select this check box to display the Relationship Viewer on mobile devices. This field will not be enabled if the corresponding option in the Business Object Model System Options is not checked.

Spider Out to Customer During a synchronization, this option controls whether the synchronization process spiders out to retrieve the full object , that is, Company, Consumer, and so forth, or if only the Name is retrieved.

Note. If you check this box, there may be a slight decrease in system performance.

Show 360 Degree View Select this check box to display the 360–Degree View on mobile devices. This field will not be enabled if the corresponding option in the Business Object Model System Options is not checked.

Bill To Customer Select this check box if you want customers created on the mobile device to be Bill To customers. Addresses created for a Bill To customer will automatically be marked as a Bill To Address and the primary address will automatically be marked as a Primary Bill To Address. Bill To Customer means that invoices can be sent to the customer or site.

Ship To Customer Select this check box if you want customers created on the mobile device to be Ship To customers. It should be noted that addresses created for such a Ship To customer will automatically be marked as a Ship To Address and the primary address will automatically be marked as a Primary Ship To Address. Ship To Customer means that invoices can be shipped to the customer or site.

Sold To Customer Select this check box if you want customers created on the mobile device to be Sold To customers. It should be noted that addresses created for such a Sold To customer will automatically be marked as a Sold To Address and the primary address will automatically be marked as a Primary Sold To Address. Sold To Customer means that invoices can be sold to the customer or site.

Address Purpose Type These are the defaults for the address contact methods that are created on the device. Delivered values are: *Physical Location, Business, Campus, Dormitory, Home, Legal, Mailing,* and *Other*.

Email Purpose Type These are the defaults for the email contact method. Delivered values are: *Business, Campus, Dorm, Home* and *Other*.

Phone Purpose Type These are the defaults for the phone contact method. Delivered values are: *Business, Cell, Default, FAX, Home, Telex, Campus, Dormitory, main* and *Other*.

Person Configuration Select options to set default actions in the Person component. These actions determine how you view the content in the person component. Delivered options include:

When User Clicks "Add" Button

- Add new person with contact details
- Add new person with consumer details

View for Persons with Multiple Roles

	• View contact details if the person has Contact role • View consumer details if the person has Consumer role
Role Type ID	Displays the identification code associated with the business object role type. When adding a new role type, the system automatically assigns a value using automatic numbering functionality.
Role	Displays the role for which you want to view relationships.
Business Object Name Type	Displays the business object name type for which this role type is valid.
Relationship View Name	Select the relationship view that you want to associate with the role
Spider Out to Relationships	During a synchronization, as transactions are encountered this option will control whether the sync process will spider out to the relationships. **Note.** If you select this option and also select *Spider out to Customer*, all customer data will be moved to the mobile device which may impact the performance (depending on the volume of customer data in the system).
360 Degree Tree Name	The tree displays all activities and interactions for the company or contact. Plus, it can display an add and search node for the particular activity of the tree. Click the detail link to navigate to the detail pages for the activity. Click the add link to access a page where you can add the activity. Click the search link to access a page where you can search for the activity.
360 Degree Tab Number	Displays the tab number of the page in the corresponding component.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Working with the Relationship Viewer”

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Business Object Management Basics”

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Interactions and 360-Degree Views”

Defining Mobile Attachment Rules

Before you use the mobile product, you need to set up the following options:

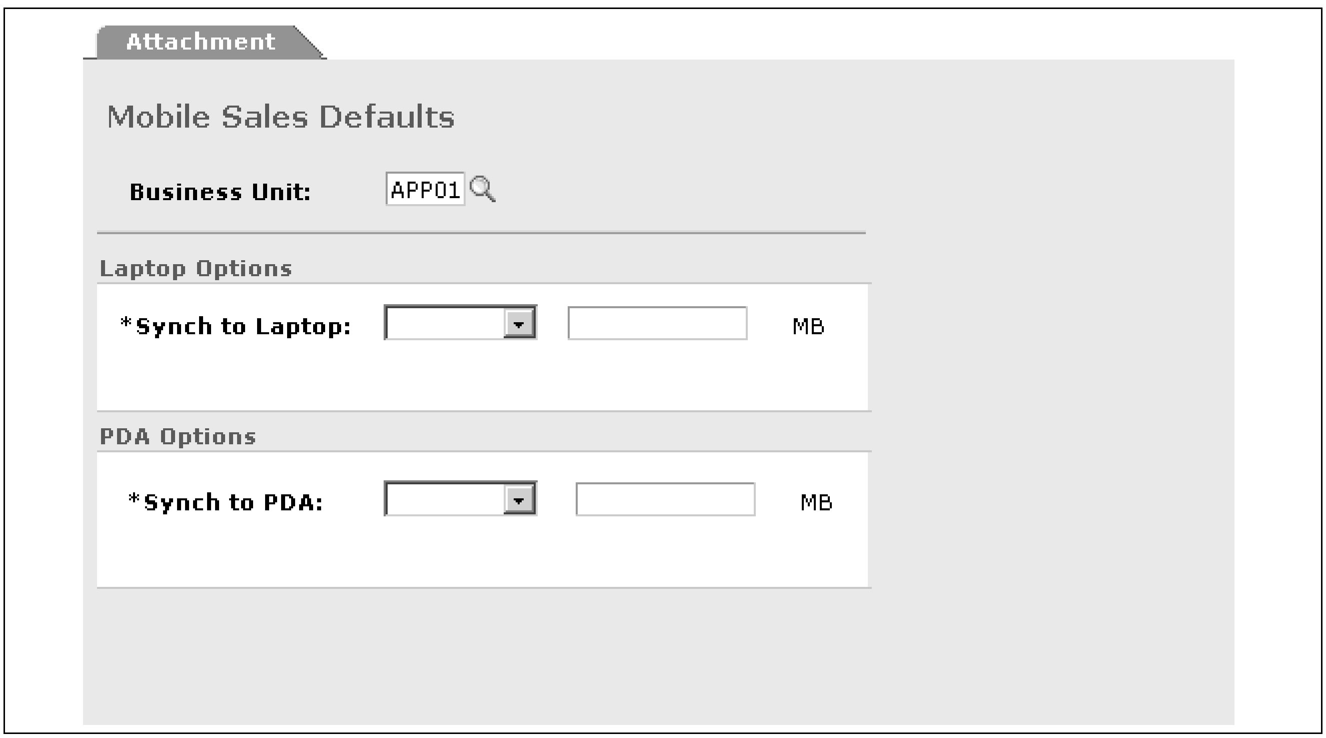
- Type of attachments.
- Custom size of the attachments (if you want to specify the size of some attachments).
- Size of the product images to be displayed on the mobile device.

Pages Used to Define Mobile Attachment Rules

Page Name	Object Name	Navigation	Usage
Attachment	RSF_SYNC_ATTACH	Set Up CRM, Business Unit Related, Mobile Rules	Define mobile sales attachment rules.
Mobile Product Defaults	MOC_OPTIONS_PG	Set Up CRM, Install, Mobile, Mobile Product Options	Define mobile product attachment rules.
Mobile Order Capture Defaults	MOC_OC_OPTIONS_PG	Set Up CRM, Install, Mobile, Mobile Order Capture Options	Define mobile order capture attachment rules.
Mobile Field Service Options	RF_MOB_SYNC_OPT	Set Up CRM, Install, Mobile, Mobile Field Service Options	Define mobile field service attachment rules.

Defining Mobile Sales Attachment Rules

Access the Attachment page.



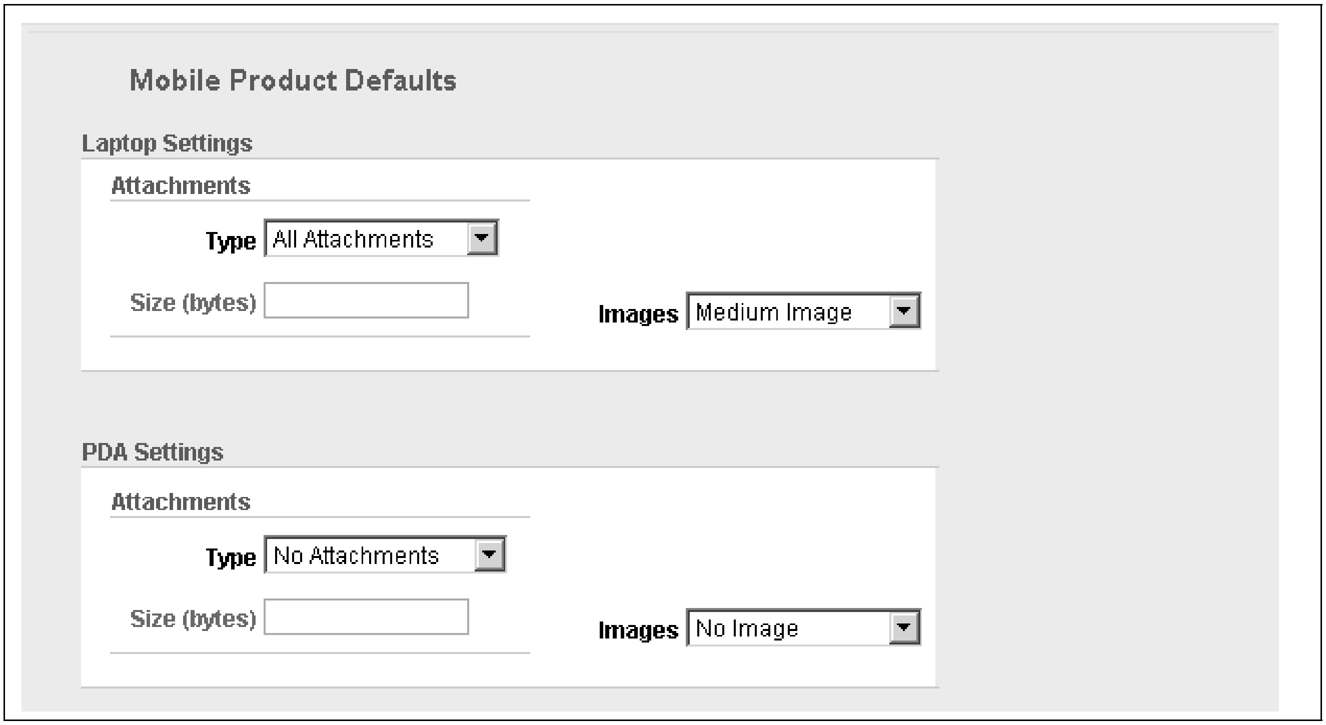
Attachment page

Sync to Laptop(synchronize to laptop)
Select the synchronization options for attachments to be passed down from the database to the mobile device. Valid values are: *All*, *Size Up To*, and *None*. When you select *Size Up To*, the system enables you to select attachments up to a certain size.

Sync to PDA(synchronize to personal digital assistant)
Select the synchronization options for attachments to be passed down from the database to the mobile device. Valid values are: *All*, *Size Up To*, and *None*. When you select *Size Up To*, the system enables you to select attachments up to a certain size.

Defining Mobile Products Attachment Rules

Access the Mobile Product Defaults page.



Mobile Product Default page

Laptop Settings

Type

Select the synchronization option for attachments that are to be passed down from the database to the laptop computer. Valid values are: *All Attachments*, *Custom Size* and *No Attachments.* When you select *Custom Size*, the system enables you to select attachments that are less than a certain size.

Size (bytes)

Specify the size (in bytes) of the attachments that you want to pass down from the database to the laptop computer. The system delivers only attachments that are less than the specified size.

Images

Select the size of the product images that you want to pass down from the database to the laptop computer. Values are: *Large Image, Medium Image*, *No Image*, *Small Image*,and *Zoom Image.* The default is *Medium Image.*

PDA Settings

Type

Select the synchronization option for attachments that are to be passed down from the database to the PDA. Values are: *All Attachments*, *Custom Size* and *No Attachments.* When you select *Custom Size*, the system enables you to select attachments that are less than a certain size.

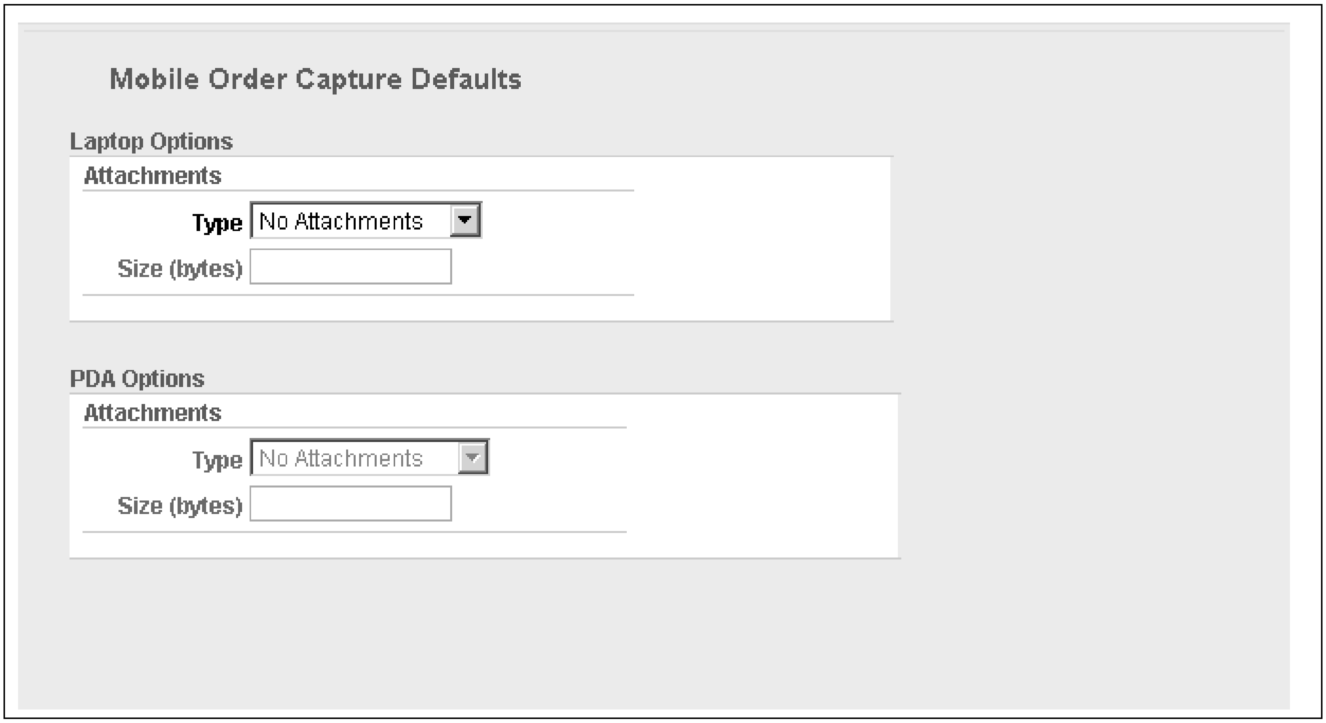
Size (bytes)

Specify the size (in bytes) of the attachments that you want to pass down from the database to the PDA. The system will only deliver attachments that are less than the specified size.

Images Select the size of the product images that you want to pass down from the database to the PDA. Valid values are: *Large Image, Medium Image, No Image, Small Image,*and *Zoom Image.* The default is *Medium Image.*

Defining Mobile Order Capture Attachment Rules

Access the Mobile Order Capture Defaults page.



Mobile Order Capture Defaults page

Laptop Settings

Type Select the synchronization option for attachments that are to be passed down from the database to the laptop computer. Valid values are: *All Attachments, Custom Size* and *No Attachments.* When you select *Custom Size*, the system enables you to select attachments that are less than a certain size.

Size (bytes) Specify the size (in bytes) of the attachments that you want to pass down from the database to the laptop computer. The system delivers only attachments that are less than the specified size.

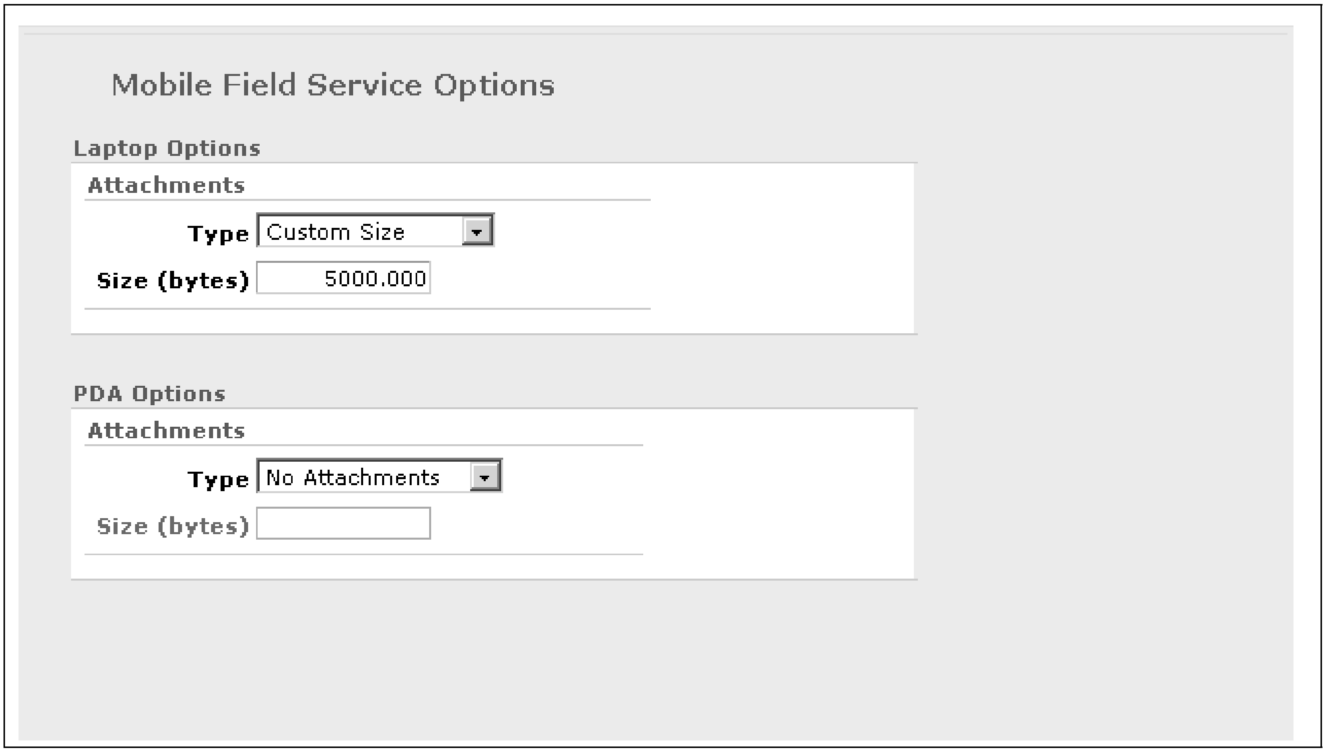
PDA Settings

Type Select the synchronization option for attachments that are to be passed down from the database to the PDA. Values are: *All Attachments, Custom Size* and *No Attachments.* When you select *Custom Size*, the system enables you to select attachments that are less than a certain size.

Size (bytes) Specify the size (in bytes) of the attachments that you want to pass down from the database to the PDA. The system will only deliver attachments that are less than the specified size.

Defining Mobile Field Service Attachment Rules

Access the Field Service Options page.



Mobile Field Service Options page

Laptop Settings

Type

Select the synchronization option for attachments that are to be passed down from the database to the laptop computer. Valid values are: *All Attachments*, *Custom Size* and *No Attachments.* When you select *Custom Size,* the system enables you to select attachments that are less than a certain size.

Size (bytes)

Specify the size (in bytes) of the attachments that you want to pass down from the database to the laptop computer. The system delivers only attachments that are less than the specified size.

PDA Settings

Type

Select the synchronization option for attachments that are to be passed down from the database to the PDA. Values are: *All Attachments*, *Custom Size* and *No Attachments.* When you select *Custom Size*, the system enables you to select attachments that are less than a certain size.

Size (bytes)

Specify the size (in bytes) of the attachments that you want to pass down from the database to the PDA. The system will only deliver attachments that are less than the specified size.

Setting Up Out-of-Date Detection

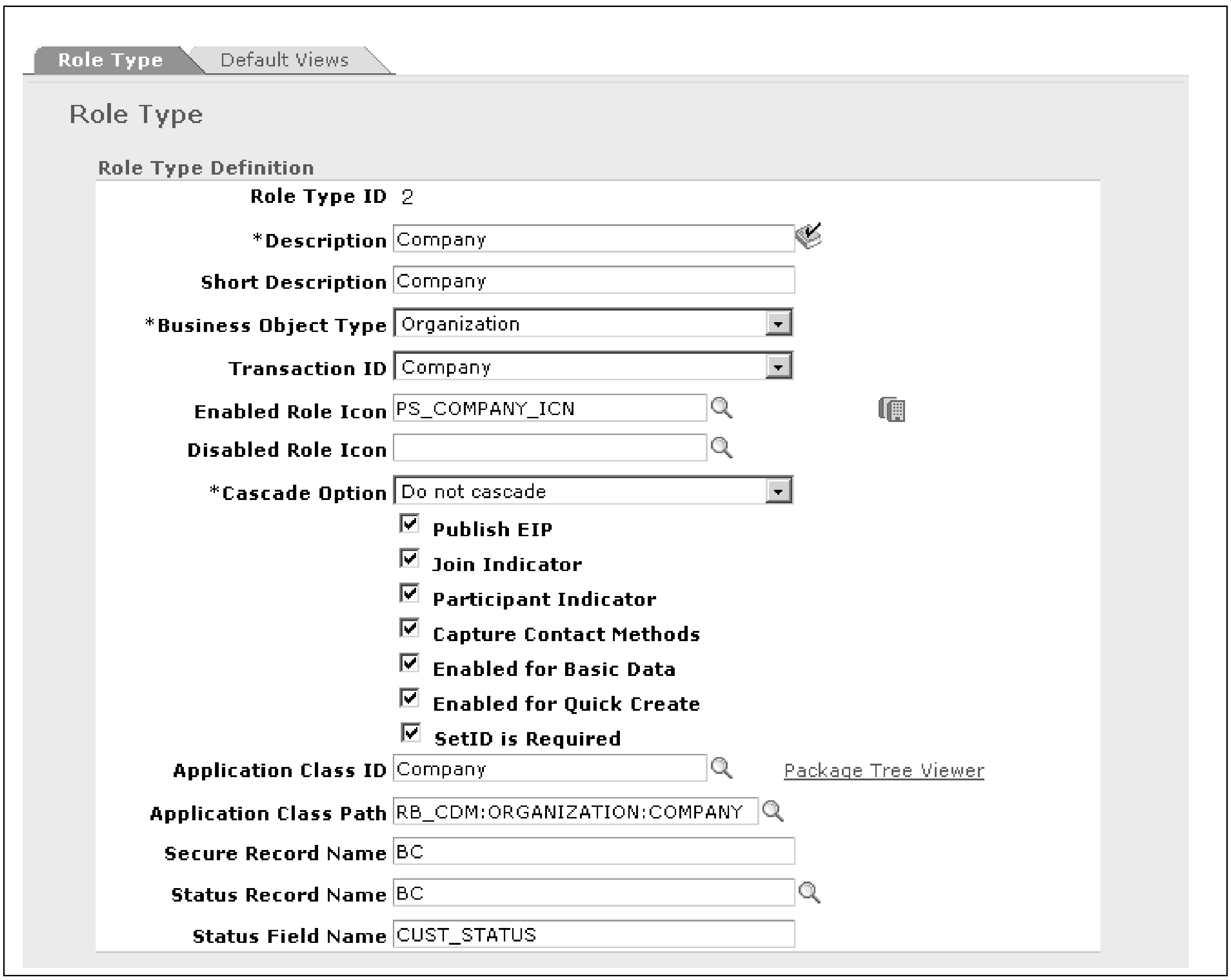
The four components (Company, Contact, Consumer, Site) in the PeopleSoft Enterprise CRM mobile applications utilize the Basic table to accommodate out-of-date detection. In order to set up for out-of-date detection, you must enable basic data for the company, contact, individual consumer, worker and site roles on the Role Type page.

Page Used to Set Up Out-of-Date Detection

Page Name	Object Name	Navigation	Usage
Role Type	RBM_DD_ROLE	Set Up CRM, Common Definitions, Customer, Role Type	Define the role type for the components and to enable out-of-date detection.

Enabling Basic Data

Access the Role Type page.



Role Type page

Enabled for Basic Data Select to enable maintenance of the Basic Data table. This also enables out-of-date detection for mobile customer applications.

See Also

PeopleTools PeopleBook: PeopleSoft Mobile Agent

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Working with the Relationship Viewer”

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Interactions and 360-Degree Views”

CHAPTER 4

Working with Customer and Product Information on a Mobile Device

This chapter provides an overview of customer information in PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) mobile applications and discusses how to:

- Work with companies, consumers, contacts, workers and sites.
- Work with tasks.
- Work with product information.

Understanding Customer Information in PeopleSoft Enterprise CRM Mobile Applications

PeopleSoft Enterprise CRM mobile applications enable you to view customer information for one predefined business unit on mobile devices. The functionality that is available on the device may differ, depending on the device and the permissions and data distribution rules that are set by the administrator.

Note. Although the business units that PeopleSoft Enterprise Mobile Sales and PeopleSoft Enterprise Mobile Order Capture use can be different, their business units must be referenced to the same setID for product and customer. However, the setIDs for product and customer can be different.

Object	Actions Available
Company	• View and update a company. • Create a new company. • Add contacts. • View site information. • Maintain notes and attachments. • View, add or modify a phone number/pager, address, and email. • View Account Team. • View Account Plan. • View Tasks. • View Call Reports • Financial Accounts (if the company is for "Financial Service" or "Insurance" industry market)
Person	• View and update a consumer or contact. • Create a new consumer or contact. • View worker information (if the person is a worker). • Add or modify an address, phone number, email, or pager number. • View site information. • Maintain notes and attachments. • View associated customers. • View, Add, or modify Tasks. • View, Add, or modify Call Reports. • Under the person's "Consumer" view, one can view Account Team, Account Plan, and (If market is Financial Service or Insurance) Financial Account.
Site	• View the site. • View the site name. • View the site address.
My Contacts	• Add a contact. • View a contact. • Remove a contact from My Contacts list on the Person detail page.

Understanding Tasks in CRM Mobile Applications

PeopleSoft Enterprise CRM Mobile applications enable you to create and view tasks. A task enables a relationship manager to plan and manage the day-to-day activities that are associated with managing an account. Tasks might include attending meetings, following up on prospects, or sending birthday cards to a valued customer.

Understanding Products in CRM Mobile Applications

PeopleSoft Enterprise CRM mobile applications enable you to view product information for one predefined business unit on mobile devices.

Note. PeopleSoft Enterprise Mobile Sales and PeopleSoft Enterprise Mobile Order Capture both use products for their transactions. While products are supported on the PDA, orders and quotes are supported only on the laptop computer.

Note. Although the business units that PeopleSoft Enterprise Mobile Sales and PeopleSoft Enterprise Mobile Order Capture use can be different, their business units must be related to the same setID for product and customer. However, the setID for product and customer can be different.

Object	Actions Available
Product	• View product information. • Search for products.

See Also

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

Working with Companies, Consumers, Contacts, Workers and Sites

The data distribution rules that are defined for the user ID and role determine the set of data that is loaded onto the mobile device.

For help with PeopleSoft Enterprise CRM mobile applications, return to this PeopleBook.

Note. If you enter invalid information in a company or contact record, or fail to enter required information, an error may occur during synchronization. Be sure that the information that you enter is valid for that object, and be sure to complete all required fields (marked with *).

This section discusses how to use companies, consumers, contacts, workers, and sites on a mobile device.

Note. You can't access the Relationship Viewer on a PDA.

See Also

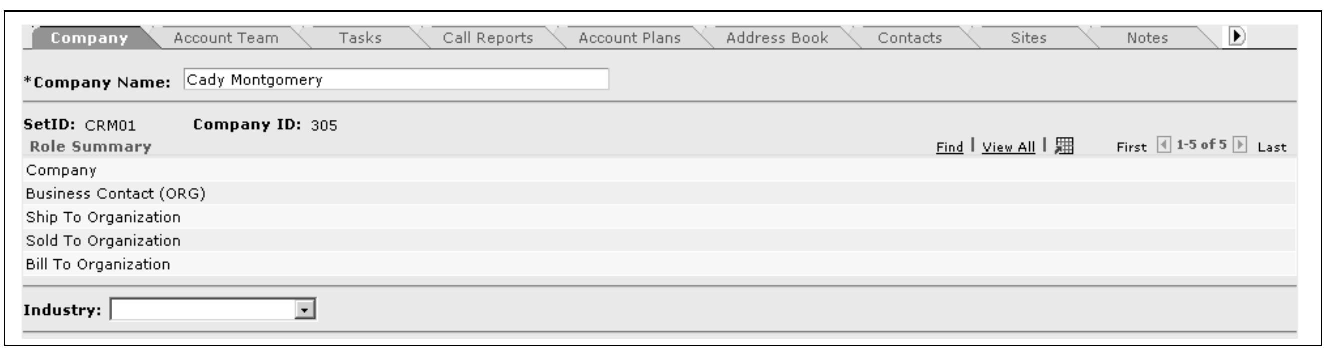
PeopleTools PeopleBook: PeopleSoft Enterprise Components

Pages Used to Work with Companies, Consumers, Contacts, Workers, and Sites

Page Name	Object Name	Navigation	Usage
Company	RDM_COMPANY_2	Customers CRM, Add/Search Company, Company	Add, update, or view company information.
Person	RDM_PERSON	Customers CRM, Add/Search Person, Person	Add, update, or view consumer or contact information.
Call Reports	RDM_CALL_REPORT	Customers CRM, Add/Search Person, Call Report	Add or view call reports for a consumer or contact.
Worker	RDM_WORKER	Customers CRM, Add/Search Person. Select a worker.	View worker information.
Sites	RDM_SITE_2	Customers CRM, Add/Search Site, Site	View site information.
My Contacts	RDM_CONTACT_LIST	My Contacts	View a list of contacts for the mobile user.

Using Companies

Access the Company page.



Company page on a laptop computer

The Company component:

- Allows you to view, edit, add, or delete some company detail.
- View Tasks, Call Reports, Account Team, and Account Plan.
- Provides no view of company profile information.

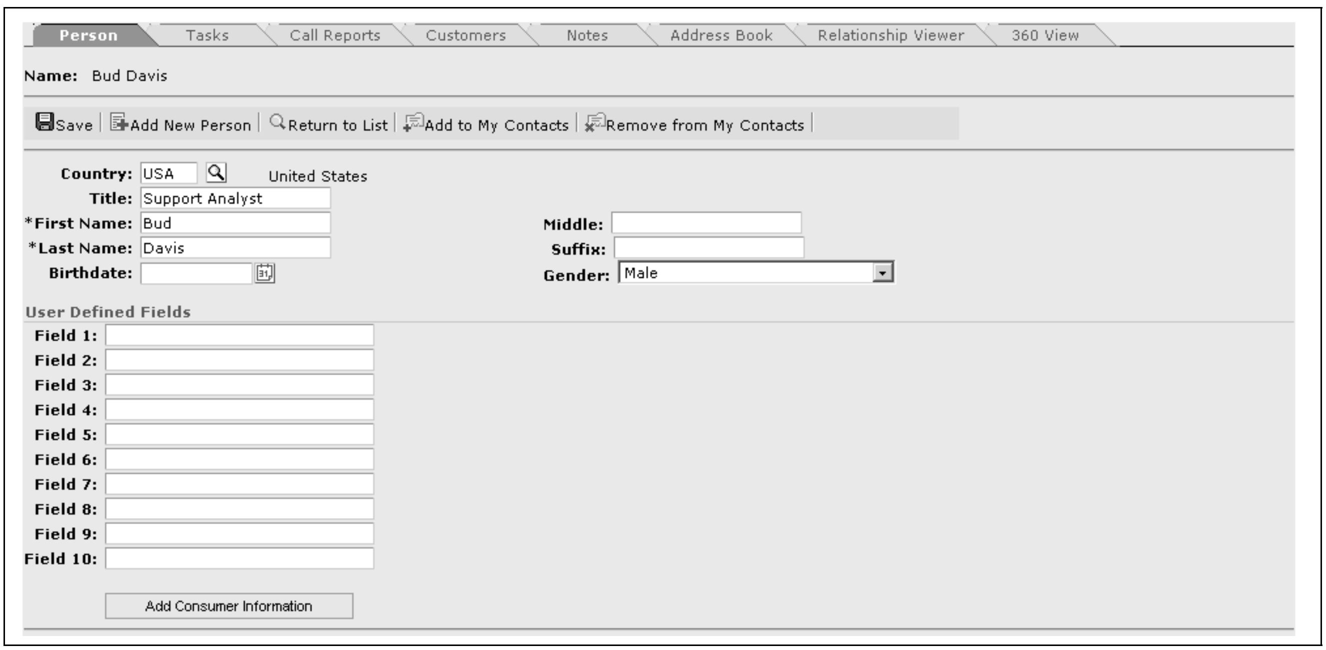
- Provides no access to edit roles, relationships, sites, purchasing options, attributes, or account information.
- Provides no access to lookup or selection of currency type.
- Provides no access to managing addresses, phone numbers, email addresses, or pager numbers for a site.
- Supports global address formats.
- Determines the default company currency from the user preferences.
- When creating new company in mobile device, sets the default the company setID to the default setID, as determined by the user preferences.
- When creating a new company, sets the company market to the mobile user's default market as determined by user's user preferences. If the market is not specified in user preference then "GBL" is the default value.
- In configuring the Relationship Viewer company, you can only select views where the role of the company would be at the top of the tree.
- In the 360-Degree View, you can click the link on the tree to transfer to a detail component, but you can't initiate any other actions such as background processing.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, "Defining Company Business Objects"

Using Consumers and Contacts

Access the Person component.



Person page on a laptop computer

The Person component:

- Provides the user with access to view, edit, add or delete consumer and contact information.
- Provides the user with access to view, edit, or add Task with the person.
- Provides the user with access to view, edit, or add Call Report associated with the person.

- Provide up to 10 user definable fields for the user to enter information for a person.

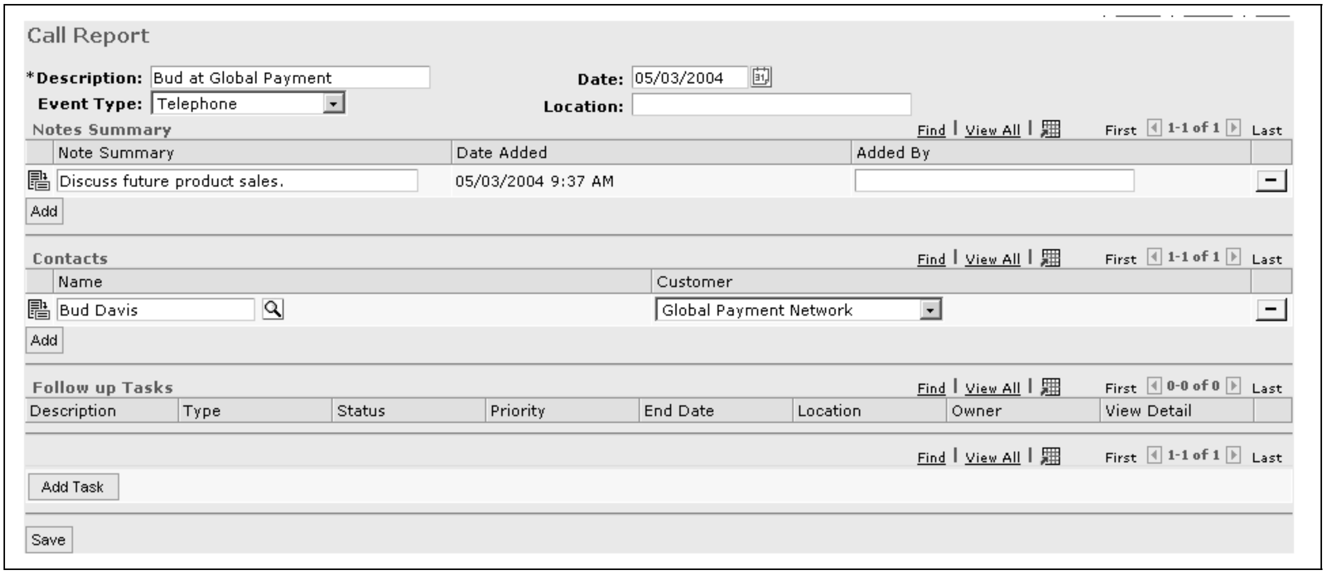
  The information entered here can only be viewed by the user whose account they were created from. The information can be viewed from either online or mobile. The labels of those fields cannot be changed on mobile — they can be changed only from online Person page.
- Provides the user with access to view, edit or add notes and attachments.
- Enables the user to add a person to My Contacts list, or remove the person from My Contacts.
- Does not provide the user with a view of consumer or contact profile information.
- Does not provide the user with access to edit roles, relationships, user profiles, bill payees, or purchasing options.
- Does not provide the user with access to employment or credit card information.
- In the 360–degree view, the user can click the link on the tree to see a detail component, but you cannot initiate any other actions such as background processing.
- Does not provide the user with access to lookup or selection of currency type.
- Supports global address formats.
- When the user creates a new Person and the role is consumer, the system defaults the setID to the default setID, as determined by the users preferences.
- When the user creates a new Person, the system defaults the market to be the default market, as determined by the user's preferences. If no user preferences have been set up for the user account, then GBL (for global) is default the value.
- In configuring the Relationship Viewer company, views can only be selected where the role of the consumer or contact is at the top of the tree.

Note. You can add a new contact to a lead or opportunity, but the contact will not appear in the mobile database until you add the contact in the connected application and perform a full synchronization.

Note. A person may have one or multiple roles among Contact, Consumer, or Worker roles. The Person Detail page displays different information based on the role of the person. On the Person Search page there is an indication of what role(s) a person has. If a user opens a person detail page and the person has multiple roles, the details that initially appear on the page are based on the setup in the person configuration section of the Mobile Customer Options page. However, the user can choose to open or add different role for the person from the initial person display page. Another set up parameter in "Person Configuration" determines which view will show when the user adds a new person.

Creating Call Reports

Access the Call Reports page.



Call Report page on a laptop computer

Note. After creating a new Call Report on mobile device, you must perform an Upload Change or Update Business Data sync to upload the new Call Report. Only then will it appear in the corresponding page of the Person component.

General Information

Enter information that describes the event.

Notes Summary

Enter notes and attachments that relate to the event.

Contacts

View the list of contacts that attended the event and add contacts.

Follow Up Tasks

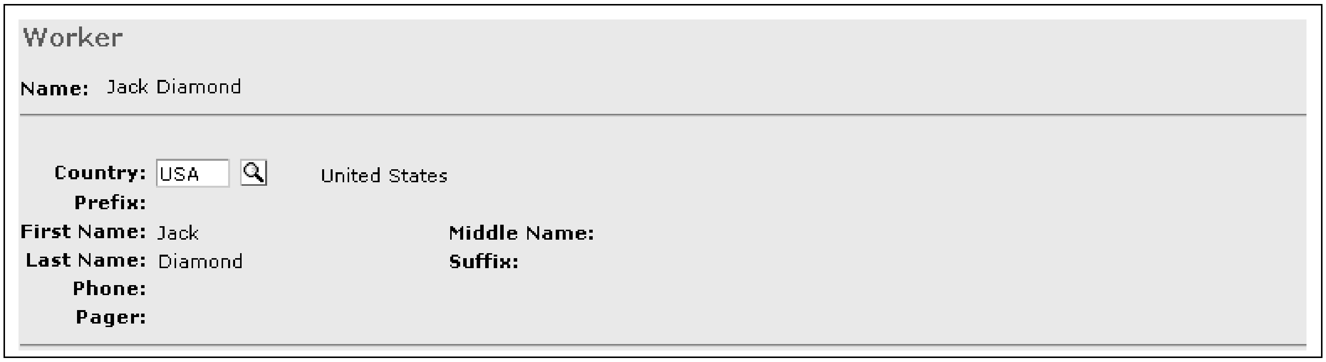
View the list of tasks associated with the event. When creating a new follow up task, you must first save the call report.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Working with Contacts," Working with Call Reports

Viewing Worker Information

Access the Worker page.

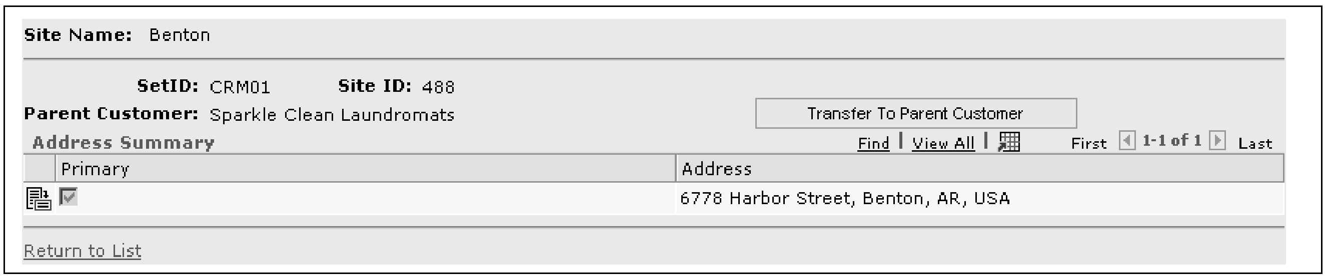


Worker page on a laptop computer

The Worker page provides view-only information for workers.

Using Sites on a Mobile Device

Access the Site page.



Site page on a laptop computer

The mobile Site component:

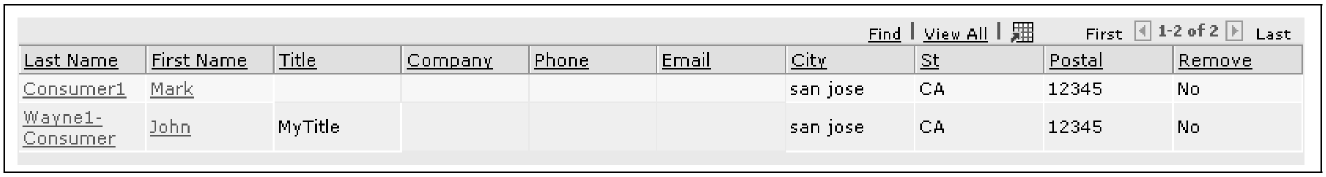
- Provides no editing capabilities.
- Provides no phone number, email address, and pager information.
- Provides no status and currency data.
- Provides no company profile information.
- Provides no site type (premise and super-premise).
- Provides no installed services information.
- Provides no purchasing options and attributes.
- Provides a transfer to the parent company information.

See Also

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

Using the My Contacts Page

Access the My Contacts page.



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

Last Name	First Name	Title	Company	Phone	Email	City	St	Postal	Remove
Consumer1	Mark					san jose	CA	12345	No
Wayne1-Consumer	John	MyTitle				san jose	CA	12345	No

My Contacts page on a laptop computer

The My Contacts page:

- Provides view access to all of the contact person(s) who are in this user's "My Contacts" list.

  The My Contacts list is user specific. The list is generated either through online My Contacts management or being added to the list on mobile device using the Person page.
- Provides no ability to import a contact to the My Contacts list.
- Provide the ability to add or remove a contact into or from the My Contacts list by clicking the toolbar icon buttons on the Person page.

Note. Users can search contacts from the My Contacts list using various fields including Last Name, First Name, Title, Company(ies) the person representing, Phone, Email address, City, State, and Postal code. The last column, "Removed" indicates whether or not the person has been marked to be removed from the list on the mobile device. To remove a contact from the My Contacts list in the database, the user must run Upload Change or Update Business Data to upload to the server database.

Working with Tasks on a Mobile Device

This section illustrates how to manage Tasks on a mobile device.

Managing task details on a mobile device is essentially the same as on a tethered device. The only difference is that the mobile application has additional means by which the task details are accessed.

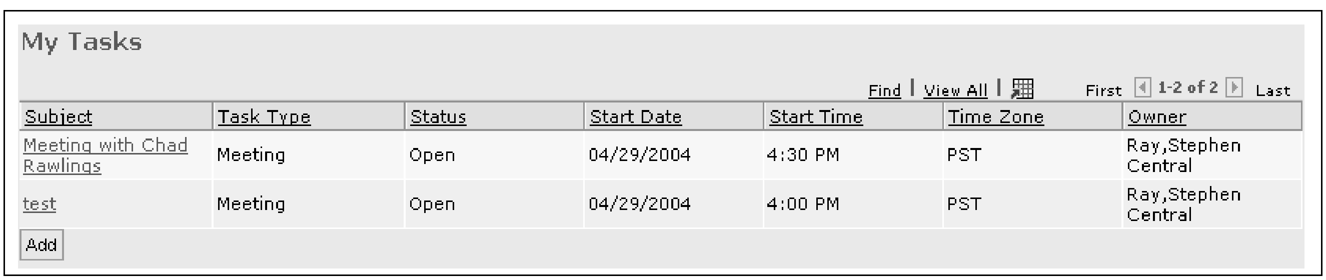
Note. After creating a task for a consumer or contact on mobile device, the user must perform an Update Business Data sync to upload the new task. Only then will it appear in the corresponding page of the Person component.

Pages Used to Manage Tasks

Page Name	Object Name	Navigation	Usage
My Tasks	RBM_TSK	My Tasks	View a list of the users tasks.
Task Details	RBM_TSK	• My Tasks ,Select a task subject link. • Leads ,Click the Tasks tab, Click the icon for a Task, Task Details • Opportunities ,Click the Tasks tab, Click the icon for a Task, Task Details • Sales Homepage ,Click the View Task button. • Person ,Click the Tasks tab, Click the icon for a Task, Task Details • My Calendar ,Select a calendar entry link.	Enter or maintain task details.
My Calendar	RBM_CALANDAR	My Calendar	View the users daily, weekly or monthly calendars.

Using the My Tasks Page

Access the My Tasks page.



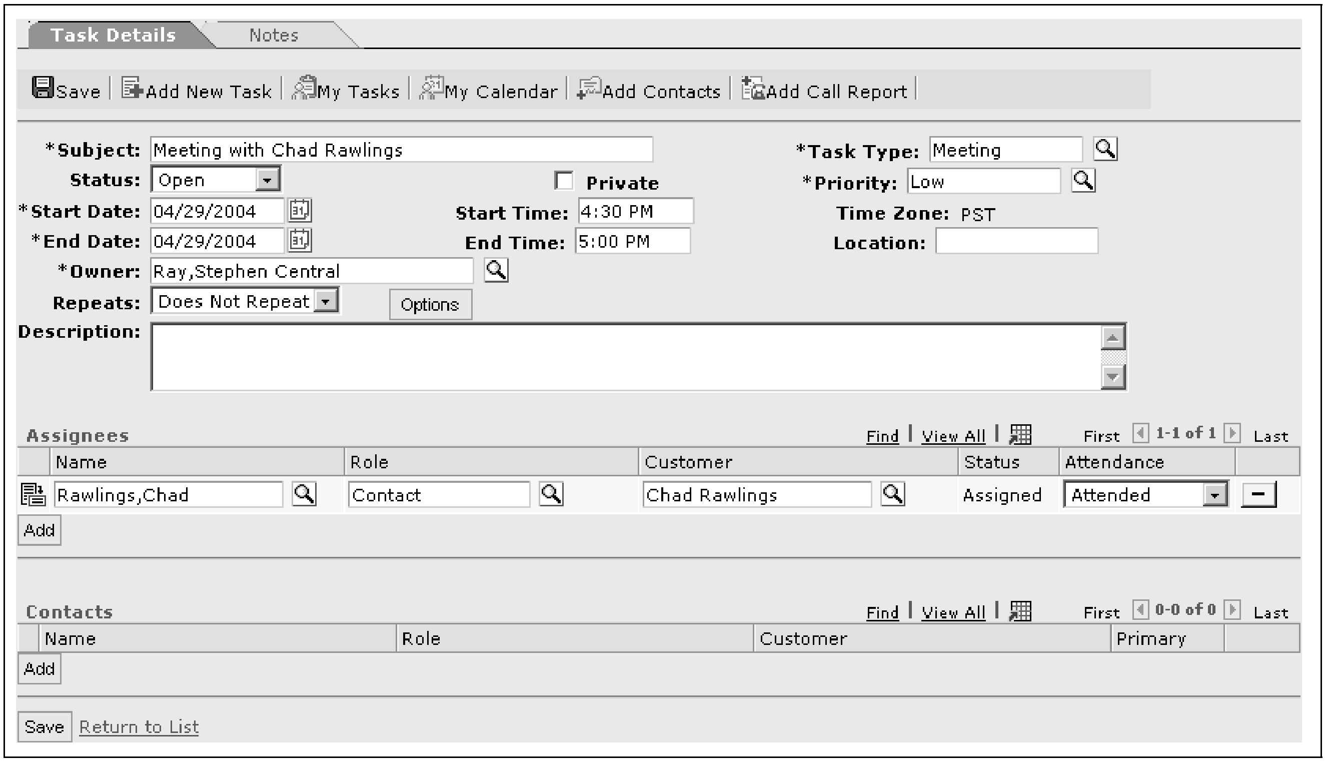
My Tasks page on a laptop computer

The My Tasks page:

- Provides a separate menu option to view tasks apart from their associated leads and opportunities.
- Provides access to standalone and transaction-related tasks.
- Provides no task deletion.

Task Details

Access the Task Details page.



Task Details page on a laptop computer

The Task Details page:

- Provides links to the associated lead or opportunity for each task.
- Provides the ability to update tasks.
- Provides the ability to add or view personal tasks.
- Provides no task deletion.

  If you select *Completed* or *Cancelled* from the Status drop-down list, or add a closed date, the task will be moved to task history for the sales transaction on the server upon synchronization.

My Calendar

Access the My Calendar page.

My Calendar page on a laptop computer

The My Calendar page:

- Provides the user with daily, weekly and monthly calendar views.
- Provides the user with access to task details.
- Enables the user to add a task in the form of a calendar entry.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Working with Tasks"

Working with Product Information on a Mobile Device

The dataset rules enable role-based filtering and distribution of data. You can determine what products are passed to the mobile device by defining data distribution rules based on datasets. The data set may differ depending on the mobile device.

Note. You should always verify the dataset rules by clicking the TEST SQL button. If you enter invalid product information, for example, a set of product ID range that is not in the database, no error will occur during synchronization. However, no product will be synchronized to the mobile device.

PeopleSoft delivers these data distribution rules for products:

- Product range.

You can restrict the range of products that can be passed to the mobile device. For example, you can specify product IDs A1000–A2999.

- Product group.

  You can include products from a particular product group.

- Product category.

  You can include products from a particular product category.

- All products by a setID.

  You can include all products with a particular setID.

- Products for businesses.

  You can include any business products.

- Products for consumers.

  You can include any consumer products.

- Configurable products.

  You can include any configurable products.

- Products by market.

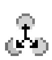
  You can include any products for a particular market.

- Products that are based on a dynamically selected business unit.

  You can include products for the business unit or setID for the person who is logged on to the mobile device.

Common Elements Used in this Section

This icon is for information only and indicates that the selected product is part of a dynamic product package.



This icon is for information only and indicates that the selected product is a configured product.

Using Products on a Mobile Device

Access the Details page.

Details page on a laptop computer

The mobile Details page enables you to:

- View product status.
- View product image (if available).
- View product attachment.

  You can click an attachment file name link and save it to local file system.
- View product group information.
- View product relationship information.

  Click the related product ID link under Product Relationship Detail page to transfer to that related product detail page.
- View product ID.
- View product description.
- View unit of measure.
- View currency.
- View list price.
- Determine if the product is a package.
- Determine if the product is a configured product.
- Enter product notes.

See Also

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

CHAPTER 5

Using PeopleSoft Enterprise Mobile Order Capture

This chapter describes the features of PeopleSoft Enterprise CRM Order Capture available on a laptop computer, including how to work with orders and quotes.

Note. To start PeopleSoft Enterprise Mobile Order Capture, you need to run the PeopleSoft Mobile Agent first, and then run the application in a browser. Select Start, Programs, PeopleSoft Mobile Agent, Start PS Mobile Agent to launch PeopleSoft Mobile Agent. Then, select Start, Programs, PeopleSoft Mobile Agent, PS Mobile Application to launch the application itself.

Working with Orders and Quotes

In this section, we explain how to:

- Create new orders or quotes.
- View existing orders or quotes.

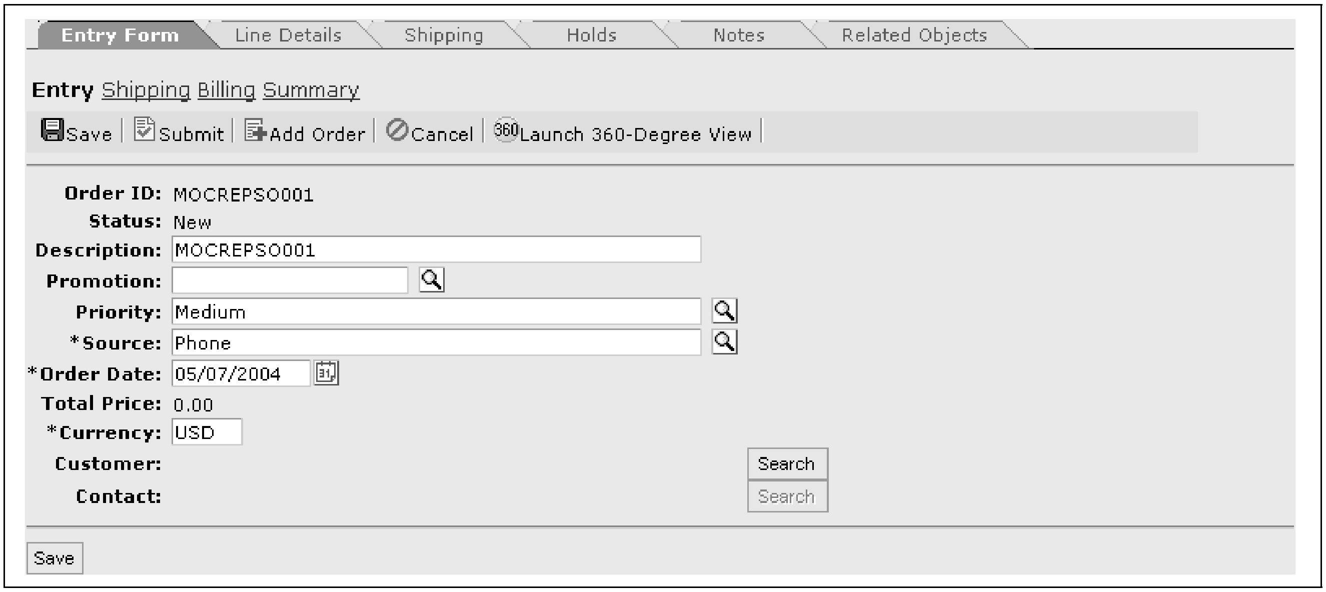
Pages Used to View or Create Orders or Quotes

Page Name	Object Name	Navigation	Usage
Add Order/Quote	MOC_DUMMY_PG	Add Order/Quote ,Click the Add Order button	Use the Add Order/Quote page to create new orders.
Entry Form	MOC_FORM	Add Order/Quote ,Click the Add Order button, Entry Form	Use the Entry Form page to begin creating a new order or quote, or view an existing order.
Line Details (Summary)	MOC_FORM	Add Order/Quote ,Click the Add Order button, Entry Form, Line Details	Use the Line Details (summary) page to view all order lines for this order, and to add order lines to the order.
Line Details	MOC_FORM	Add Order/Quote ,Click the Add Order button, Entry Form, Line Details, Click the details icon for an existing line to view details, or click the *Add* button to add a new line to the order.	Use the Line Details page to view all a single line’s details, to make edits to the line details, and to add to the order.

Page Name	Object Name	Navigation	Usage
Shipping (Summary)	MOC_FORM	Add Order/Quote ,Click the Add Order button, Entry Form, Click the Shipping tab or select the Shipping link	Use the Shipping page to view a summary of Ship To information, such as *Customer, Contact*, and *Requested Date of Shipment.*
Shipments (Details)	MOC_FORM	Add Order/Quote ,Click the Add Order button, Entry Form, Click the Shipping tab or select the Shipping link, Click the details icon next to the Customer	Use the Shipments page to change or view detailed shipping information.
Billing	MOC_FORM	Add Order/Quote ,Click the Add Order button, Entry Form, Select the Billing link	Use the Billing page to change or view billing information related to the order.
Summary	MOC_FORM	Add Order/Quote ,Click the Add Order button, Entry Form, Select the Summary link	Use the Summary page to view an entire summary of the order.
Holds	MOC_FORM	Add Order/Quote ,Click the Add Order button, Entry Form, Select the Holds tab	Use the Holds page to view holds on the order.
Notes	MOC_FORM	Add Order/Quote ,Click the Add Order button, Entry Form, Select the Notes tab	Use the Notes page to add or view a note or attachment.
Related Objects	MOC_FORM	Add Order/Quote ,Click the Add Order button, Entry Form, Select the Related Objects tab	Use the Related Objects page to view objects (such as business projects, and leads) that are related to the order.

Creating New Orders or Quotes

Access the Entry Form page.



Entry Form page

Note. The toolbar buttons displayed within PeopleSoft Enterprise Mobile Order Capture are standard PeopleSoft Enterprise Order Capture icons, and are explained in the Common Elements section of the Managing Orders and Quotes chapter of the *PeopleSoft Enterprise Order Capture 8.9 PeopleBook.* Here the icons represent, *Save Order, Submit Order, Add Order Line, Cancel Order,* and *Launch 360–Degree View*, respectively. Personalization of the toolbar icons is not supported in PeopleSoft Enterprise Mobile Order Capture.

Order ID

The order ID will initially default to <user id><capture type><sequence number>. For example, if the user ID is “MOCREP” and you are entering your first order, the order ID will be set to “MOCREPSO001.” If you are entering your second quote, the quote ID will be “MOCREPQUO002.”

Note. The order ID will be overwritten by the server upon synchronization. For example, if you have created a mobile order with the ID of “MOCREPSO001,” it will change to a number. The format is determined by the Capture Type workbench when you next synchronize.

Status

There are nine delivered statuses: *Canceled*, *Generating*, *New*, *Submitted*, *Partial Hold*, *In Fulfillment*, *Expired*, *Complete*, or *Hold*

Description

Enter descriptive information here. The Order ID is the default entry.

Promotion

Select a Promotion for the line.

Priority

Enter an order priority of *Urgent, High, Medium,* or *Low* to specify the default priority for all orders that are created in the business unit.

Source

Enter an informational code that identifies the source of the order. For example, you could specify *Phone* if you received this order by telephone.

Note. This is a required field so you must choose a value.

Order Date

Select the date of order entry. By default, today’s date will be entered here.

Total Price

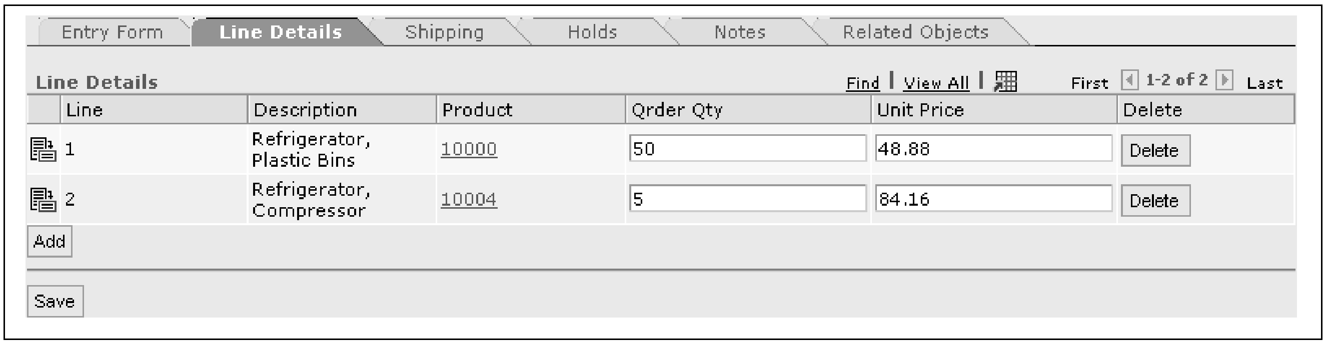
Total price of the order appears here.

Currency	Currency code is selected on the Create Order/Quote page, and displays here.
Customer	Select the sold-to customer for this order.
Contact	Select the contact person for this customer. The Sold To contact will be automatically populated after selecting a Sold To customer.

See *PeopleSoft Enterprise Order Capture 8.9 PeopleBook*

Adding Products to the Order

Access the Line Details page.



Line Details (summary) page

Line Details displays a summary of products (or order lines) on this order. Click the details icon next to the line number to drill into product detail information for a specific order line. Click the *Add* button to add another product to the order. When you click the *Add* button, and choose a product, the following Line Details page appears:

Line Details page

The Line Details page indicates the list price and total price for the line. If the order has been synchronized, the price is the final price that includes all surcharges or discounts as set up in pricing. Any special pricing is applied when synchronizing the order with the server.

Unit of Measure — Select the unit of measure for this product.

List Price — List price displays from the product definition, and is the price before the application of any price adjustments, such as discounts or surcharges.

Order Qty — Enter the quantity of product for this order line.

Unit Price — Unit price is the price of the product after pricing adjustments are applied (by the pricing engine).

Note. For PeopleSoft Enterprise Mobile Order Capture, pricing adjustments are only applied once the order has been synchronized with the main application.

Promotion — Select a promotion code from the lookup.

Minimum Price — Minimum price is determined by product setup. If you enter a unit price that is below the minimum price on the line, and then attempt to submit the order, a hold is generated at synchronization, and the order cannot continue without a manual override.

Recurring Price — If this product has a recurring price, that recurring price amount appears here. You combine the recurring price with recurring frequency to arrive at a price. This could be, for example, a price that repeats each month, or a charge that occurs each year.

Recurring Frequency — This is the frequency of the recurring price (if any), for example *weekly, monthly,* or *annual* charges.

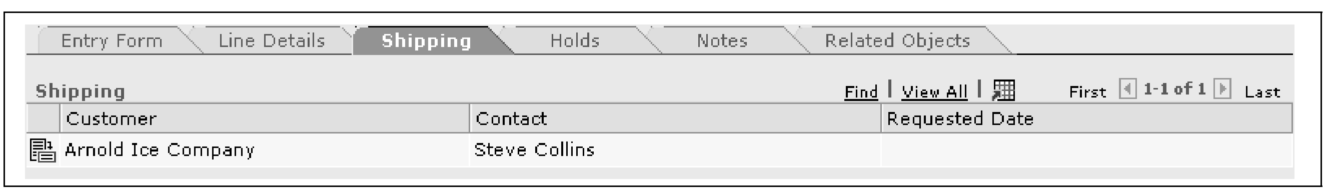
Total Price — This is the total price of the one time charges for this order line.

Save — Click the *Save* button to add this line to the order.

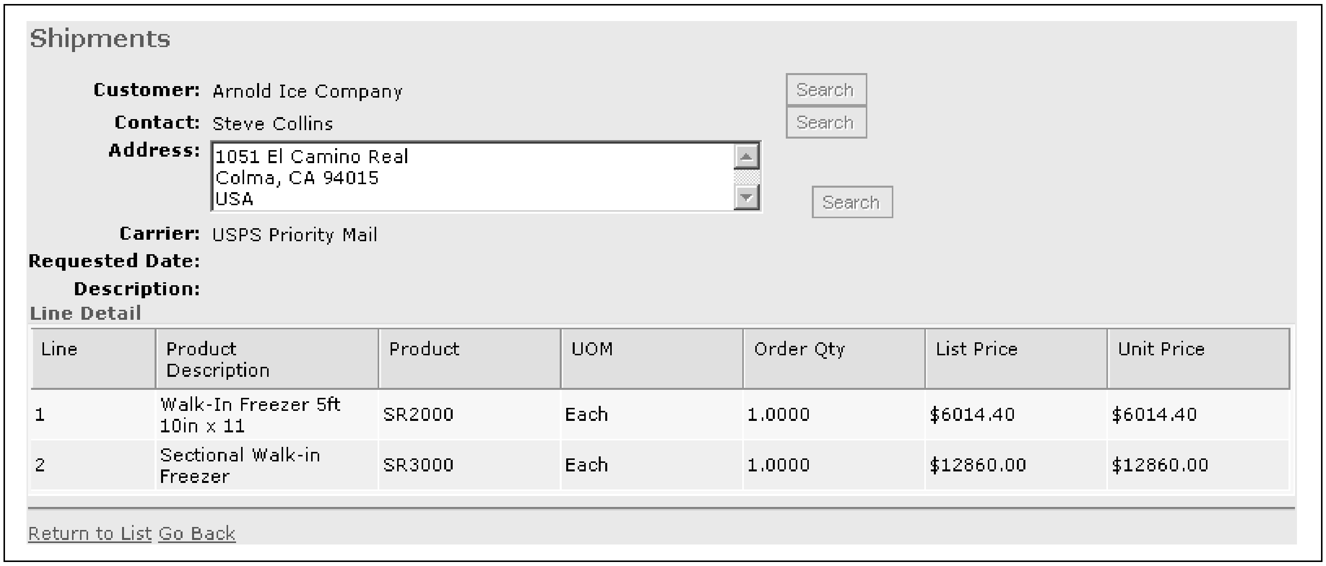
Note. You can order configured products and dynamic packages, but you cannot configure them on the mobile device. If the user orders one or more of these products and submits the order, it will be placed on hold at synchronization time. The Customer Service Representative (CSR) must configure these products from within PeopleSoft Enterprise Order Capture. You can also exclude these products from being passed to the mobile device by enforcing the appropriate data distribution rules.

Changing or Viewing Shipping Information

Access the Shipping page to view a summary of shipment information. Click the details icon next to a specific customer to access the Shipping (details) page and enter or change shipping information:



Shipping (summary) page



Shipments (details) page

Customer, Contact Change the customer and contact information by clicking the *Search* button and making a different selection.

Address The address where the shipment is delivered. This address defaults primary shipping contact (and primary shipping address for the customer) from the customer data model.

Carrier Select a carrier for this shipment by clicking the *Search* button, and making a selection.

Requested Date Enter a requested arrival date for the shipment here. Note that you can specify a future shipment date.

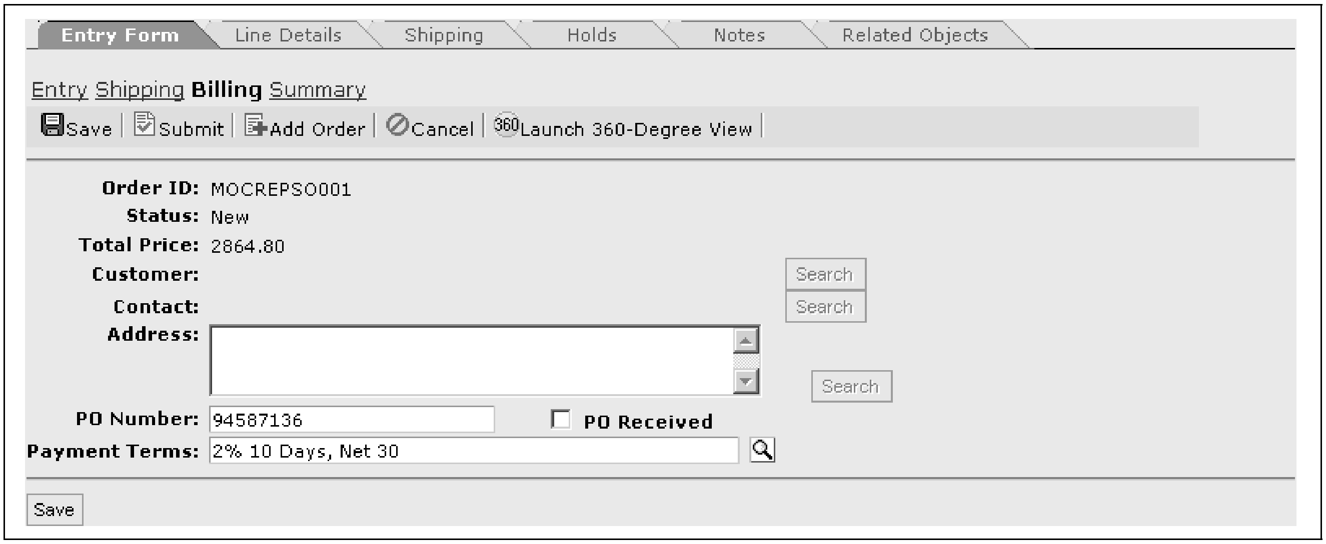
Description Enter any additional shipment information in this field.

Note. Mobile orders are restricted to a single shipment. However, if this order or quote was created in PeopleSoft Enterprise Order Capture and is shipping to multiple locations, all of those locations will be displayed here.

The Line Detail grid displays the order lines associated with each ship-to location.

Changing or Viewing Billing Information

Access the Billing page.



Billing page

We have previously explained fields that appear on the Billing page, with the exception of the following:

Customer, Contact Customer and Contact displayed here are the Bill To Customer and Contact. They are not necessarily the same ones as those that are on the Shipping or Entry Form pages.

Address This address is the billing address. By default, the primary billing contact and the primary billing address are populated from the customer data model.

PO Number Enter the Purchase Order number, if applicable.

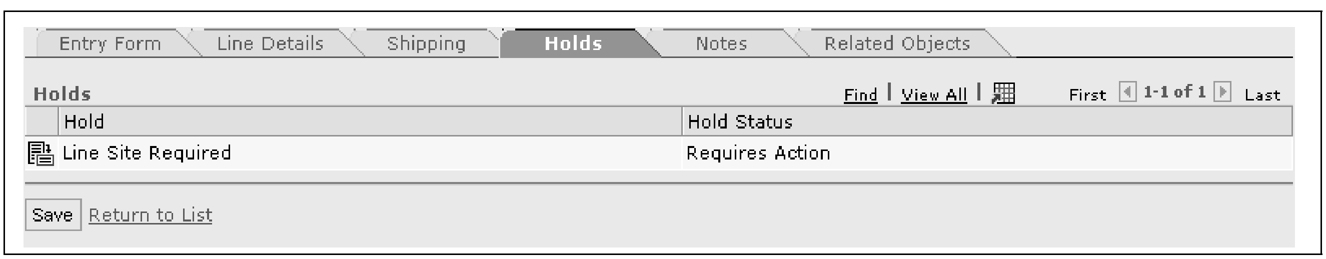
PO Received Select this check box if a Purchase Order has been received.

Note. This functionality is designed solely for auditing purposes. There is no attached business logic.

Payment Terms Select terms of payment, such as *Due Immediately.*

Managing Holds

Access the Holds page.



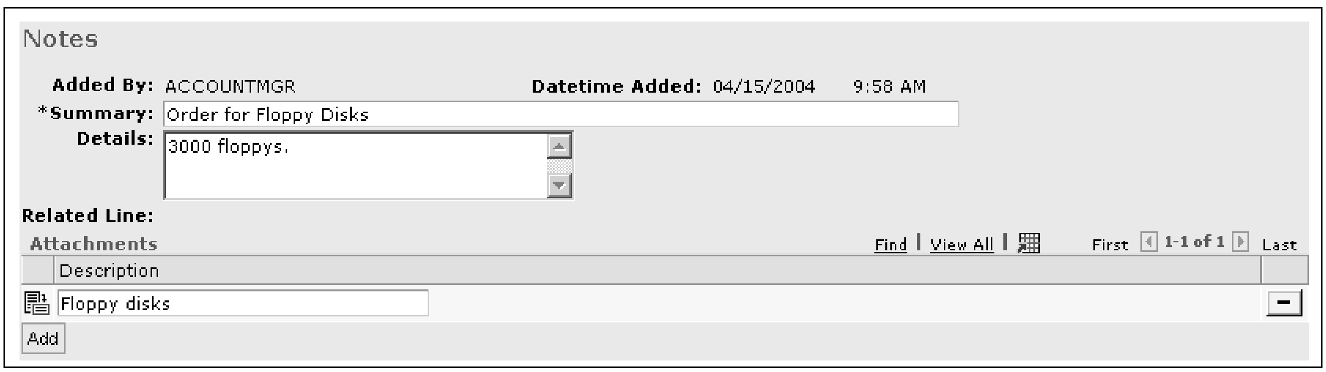
Holds page (Summary)

Holds page (Details)

Holds appear on the Holds page. You cannot remove holds in PeopleSoft Enterprise Mobile Order Capture, you can only view them. Held orders are maintainable; thus you can correct the problems caused by certain holds from the main PeopleSoft Enterprise Order Capture application. For example, if the order is held because an invalid Bill To customer was specified on the order (or no Bill To customer was specified at all), the user can change the Bill To customer and perform a synchronization. The hold is then lifted.

Adding Notes

Access the Notes summary page, and then click on the details icon to drill into Notes details.



Notes (Detail) page

Added By Displays the user name of who created the note.

Datetime Added Displays the date and time the note was added.

Summary Enter a short summary of the note.

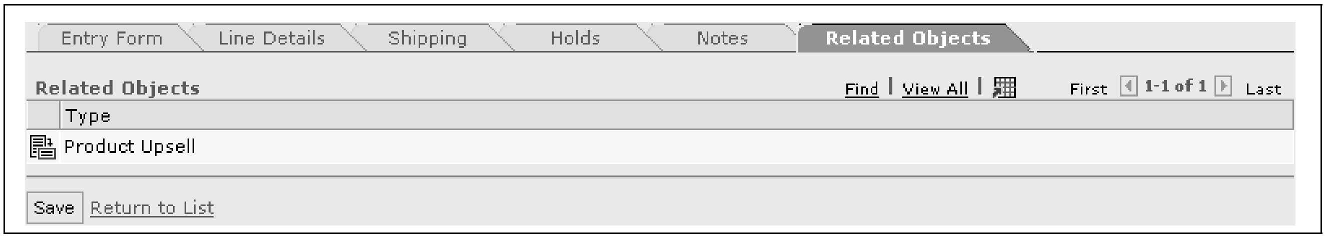
Details Enter the full text of the note.

Description Displays the description of the attachment.

Add Click the Add button to add an attachment.

Viewing Related Objects

Access the Related Objects page.



Related Objects

View related objects on this page. A related object is data, such as a business project, that is somehow related to the order or quote. If the data exists on the mobile device, you will have the option to link to that data. For example, if there is an sales opportunity associated with this order and it exists on the mobile device, you will be able to transfer to that opportunity from here.

Understanding Third-Party and Miscellaneous Calculations

These following third-party and miscellaneous charges may be applied to the order during synchronization. After synchronization these charges will be reflected on the order in Mobile Order Capture.

- Pricing discounts, surcharges, or both.
- Freight.
- Tax.
- VAT.
- Product giveaways.

Viewing Existing Orders or Quotes

You may view existing orders or quotes by using the “Search Orders and Quotes” menu option. The pages will be the same as above. Only quotes, unsubmitted orders and orders that are on hold can be modified.

CHAPTER 6

Using PeopleSoft Enterprise Mobile Sales

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

- Use the Sales Homepage on a laptop.
- Work with leads and opportunities on a laptop.
- Use forecasts on a laptop.

Note. To start PeopleSoft Enterprise Mobile Sales, you need to run the PeopleSoft Mobile Agent first, then launch Mobile Sales in a browser. Select Start, Programs, PeopleSoft Mobile Agent, Start PS Mobile Agent to launch PeopleSoft Mobile Agent. Then, select Start, Programs, PeopleSoft Mobile Agent, PS Mobile Application to launch the application itself.

Understanding Transactions in PeopleSoft Enterprise Mobile Sales

PeopleSoft Enterprise Mobile Sales delivers much of the functionality of PeopleSoft Enterprise Sales to the laptop. The functionality that is available to you may differ depending on the permissions that are set by the administrator.

The dataset rules that you define for the user ID and role determine the set of data that is loaded onto the laptop. Although business units used by PeopleSoft Enterprise Mobile Sales and PeopleSoft Enterprise Mobile Order Capture can be different, their business units must be related to the same setID for customers and products. The setID for customers and products can be different.

The table below lists the components available in PeopleSoft Enterprise Mobile Sales and describes the functionality of each component.

Mobile Object	Actions Available
Sales Homepage	View summaries of accounts, leads, opportunities, forecasts, and tasks.

Mobile Object	Actions Available
Lead	• View and update a lead. • Create a new lead. • Convert a lead to an opportunity. • Clone a lead. • Add a product, task, or note. • Delete a product or note. • Turn back a lead. • Create a quote or order (when Mobile Order Capture is installed).
Opportunity	• View and update an opportunity. • Create a new opportunity. • Add or delete a product, task, forecast, or note. • Add a forecast amount to an opportunity. • Create an order or quote (when Mobile Order Capture is installed).
Forecast	• View the revenue forecasts. • Update the forecasts. • Submit the forecasts • Reforecast. • Display subtotals. • Display a bar chart of the forecast data. • Export forecast subtotals.

Using the Sales Homepage

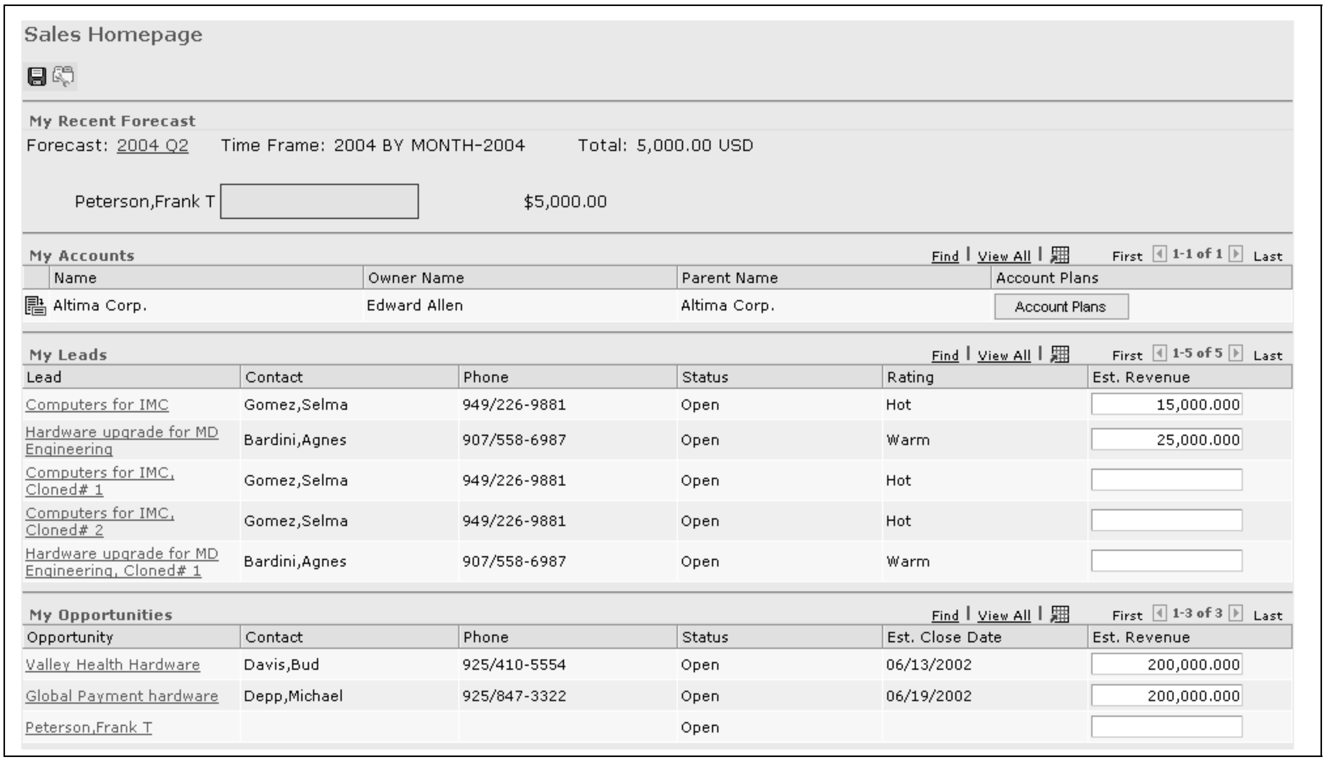
This section illustrates the Sales Homepage and explains how to set the Sales Homepage preferences.

Pages Used to View and Set Up the Sales Homepage

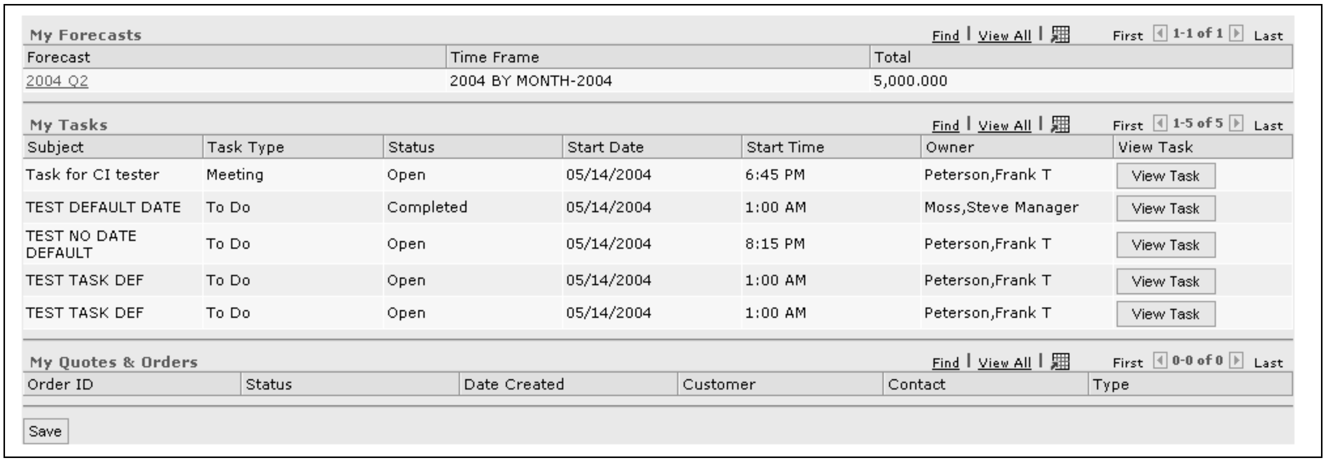
Page Name	Object Name	Navigation	Usage
Sales Homepage	RSFM_SALES_VIEWER	Sales Homepage	View summarized information about selected sales objects.
My Sales Homepage Preferences	RSFM_SV_PREFS	Click the Personalize this Page icon on the Sales Homepage.	Define what information will appear on the Sales Homepage.

Using the Sales Homepage

Access the Sales Homepage.



Sales Homepage (1 of 2)



Forecast	Time Frame	Total
2004 Q2	2004 BY MONTH-2004	5,000.000

Subject	Task Type	Status	Start Date	Start Time	Owner	View Task
Task for CI tester	Meeting	Open	05/14/2004	6:45 PM	Peterson,Frank T	View Task
TEST DEFAULT DATE	To Do	Completed	05/14/2004	1:00 AM	Moss,Steve Manager	View Task
TEST NO DATE DEFAULT	To Do	Open	05/14/2004	8:15 PM	Peterson,Frank T	View Task
TEST TASK DEF	To Do	Open	05/14/2004	1:00 AM	Peterson,Frank T	View Task
TEST TASK DEF	To Do	Open	05/14/2004	1:00 AM	Peterson,Frank T	View Task

Order ID	Status	Date Created	Customer	Contact	Type

Sales Homepage (2 of 2)

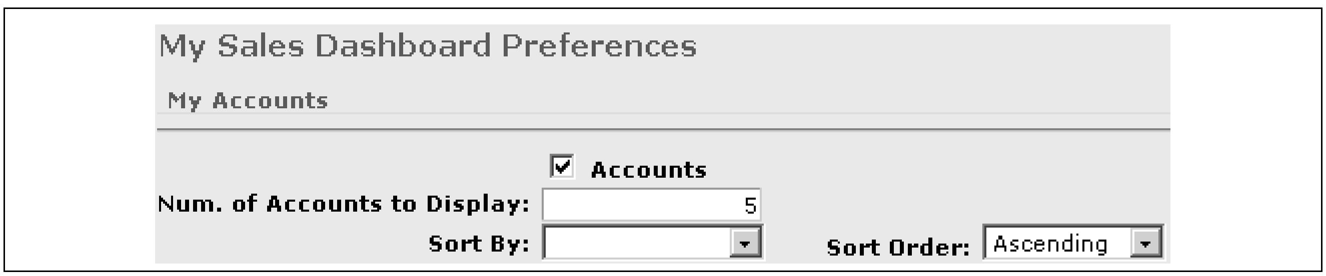
The Sales Homepage provides:

- A summarized view of the sales reps activity and direct access to Accounts, Leads, Opportunities, and Tasks.
- The latest forecast graph.
- The ability to customize the sales homepage.
- Links to the customer.
- Links to the contact and the contact's phone number.

Setting the Sales Homepage Preferences

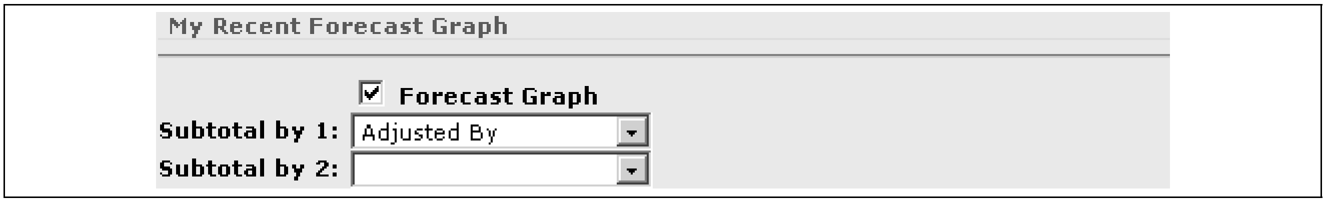
The My Sales Homepage Preferences page is split into multiple sections which enable you to define what information displays on the Sales Homepage. Selecting or clearing the check box in each section determines what type of information will be displayed. You can also define how the information is displayed by selecting Sort By and Sort Order options.

Access the My Sales Homepage Preferences page.



My Sales Homepage Preferences Page — My Accounts section

Accounts	Select to display accounts on the Sales Homepage page
Num. of Accounts to Display(number of accounts to display)	Indicate the maximum number of accounts to display on the Sales Homepage.
Sort By	Select the column by which results are sorted.
Sort Order	Select ascending or descending sort order for results.



My Sales Homepage Preferences Page — My Recent Forecast Graph section

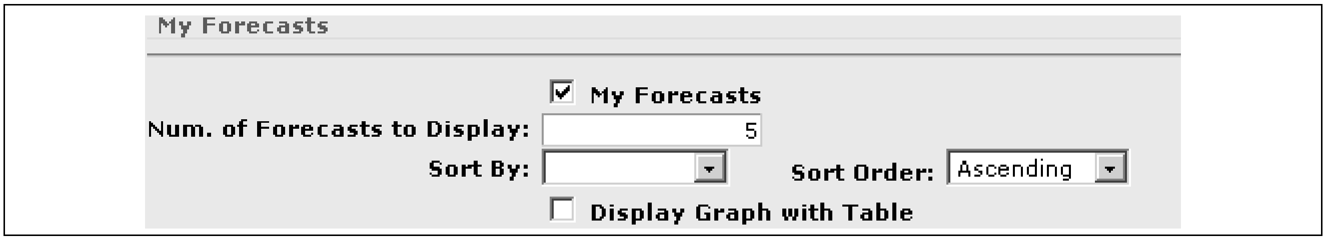
Forecast Graph	Select to display a forecast graph on the Sales Homepage.
Subtotal by 1 and **Subtotal by 2**	You must enter a value for Subtotal by 1 to display a graph. Selecting an object for Subtotal by 2 enables you to view more detailed information about a forecast. For example, the overall forecast might be for March, 2003. To display a graph that shows confidence level groups by region, you would select *Confidence %* for Subtotal by 1 and *Region* for Subtotal by 2.

My Sales Homepage Preferences Page – My Leads section

My Leads	Select to display only leads that belong to the logged in user on the Sales Homepage page.
Num. of Leads to Display(number of leads to display)	Indicate the maximum number of leads to display on the Sales Homepage.
Sort By	Select the column by which results are sorted.
Sort Order	Select ascending or descending sort order for results.

My Sales Homepage Preferences Page – My Opportunities section

My Opportunities	Select to display only opportunities that belong to the logged in user on the Sales Homepage page.
Num. of Oppys. to Display (number of opportunities to display)	Indicate the maximum number of opportunities to display on the Sales Homepage.
Sort By	Select the column by which results are sorted.
Sort Order	Select ascending or descending sort order for results.



My Sales Homepage Preferences Page – My Forecasts section

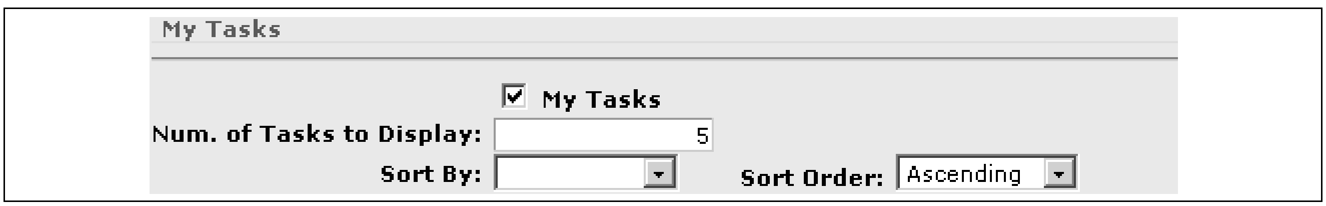
My Forecasts Select to display only forecasts that belong to the logged in user on the Sales Homepage page.

Num. of Forecasts to Display(number of forecasts to display) Indicate the maximum number of forecasts to display on the Sales Homepage.

Sort By Select the column by which results are sorted.

Sort Order Select ascending or descending sort order for results.

Display Graph with Table Select check box to display the forecast graph on the page with the subtotals table. Clear the check box to display the graph on a separate tab.



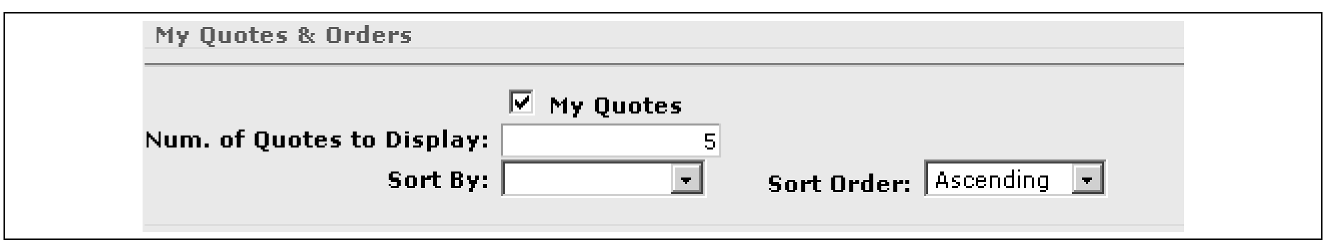
My Sales Homepage Preferences Page – My Tasks section

My Tasks Select to display tasks on the Sales Homepage page.

Num. of Tasks to Display(number of tasks to display) Indicate the maximum number of tasks to display on the Sales Homepage.

Sort By Select the column by which results are sorted.

Sort Order Select ascending or descending sort order for results.



My Sales Homepage Preferences Page – My Quotes & Orders section

My Quotes Select to display quotes on the Sales Homepage page.

Num. of Quotes to Display(number of quotes to display) Indicate the maximum number of quotes to display on the Sales Homepage.

Sort By Select the column by which results are sorted.

Sort Order Select ascending or descending sort order for results.

Using Leads and Opportunities in Mobile Sales

There are differences to be aware of when working with off-line leads and opportunities. The PeopleSoft Enterprise Mobile Sales Lead and Opportunity components are different than the tethered products in that:

- The user interface on the mobile device is slightly different. Access to contacts, products, tasks, and notes from tabs rather than using drop-down list boxes or expand-all options.
- History and attributes are not part of the mobile application.

In this section we explain how to use PeopleSoft Enterprise Mobile Sales to:

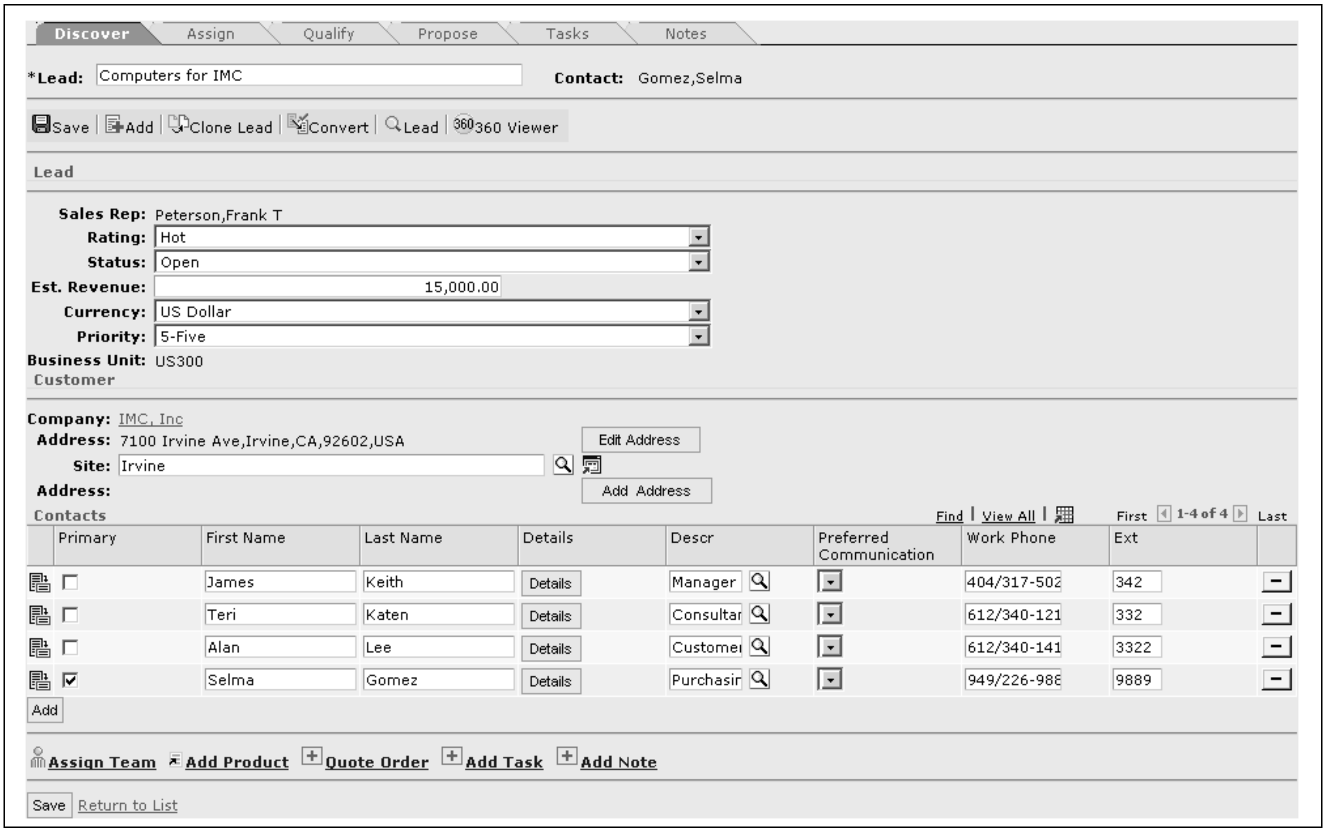
- Manage Leads.
- Convert a lead to an opportunity.
- Manage opportunities.
- Clone leads and opportunities.
- Close leads.
- Close opportunities.

Pages Used to Manage Leads and Opportunities

Page Name	Object Name	Navigation	Usage
Discover (Leads)	RSFM_LEAD	CRM, Leads, Select a Lead, Discover.	View and manage leads.
Convert Lead to Opportunity	RSFM_CONVERTLEAD	Click the Convert Lead to Opportunity icon on the (Leads) Discover page.	Select options to convert a lead to an opportunity.
Discover (Opportunities)	RSFM_OPPORTUNITY	CRM, Opportunities, Select an Opportunity, Discover.	View and manage opportunities.
Clone Lead	RSFM_CLONELEAD	Click the Clone Lead icon on the Discover page.	Select items to copy from the original lead to a clone.
Clone Opportunity	RSFM_DT_OPP_CLONE	Click the Clone Opportunity icon on the (Opportunities) Discover page.	Select items to copy from the original opportunity to a clone.

Managing Leads on a Mobile Device

Access the Discover page for Leads.



Discover page for leads on a laptop computer

The Leads component:

- Provides access to territory, region, and business unit on the Lead Details page.
- Provides a range of products for selection based on data distribution and user rules.
- The default business unit for the mobile role determines the business unit that is displayed on the laptop. As a result, you can only enter and view leads in the default business unit.

Note. When you clone a lead in the online lead component, not all of the cloned data will be downloaded to the laptop.

When you synchronize the data back to the server, any data that was previously not downloaded to the mobile device will be reattached to the old lead.

See Also

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

Converting a Lead to an Opportunity in Mobile Sales

Access the Convert Lead to Opportunity page.

Convert Lead To Opportunity page

Select

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

Note. Only opportunities from the same company as the lead are available to merge.

Create New Opportunity

Select to convert the lead into a new opportunity.

Transfer to New Opportunity

Select to transfer to the opportunity when you click OK.

When cleared, the system returns you to the Leads page that you were on when you clicked the convert button.

(Check boxes)

Select the data to carry over from the lead to the opportunity.

If you associate the lead with an existing opportunity, the system adds the selected information from the lead to the selected opportunity.

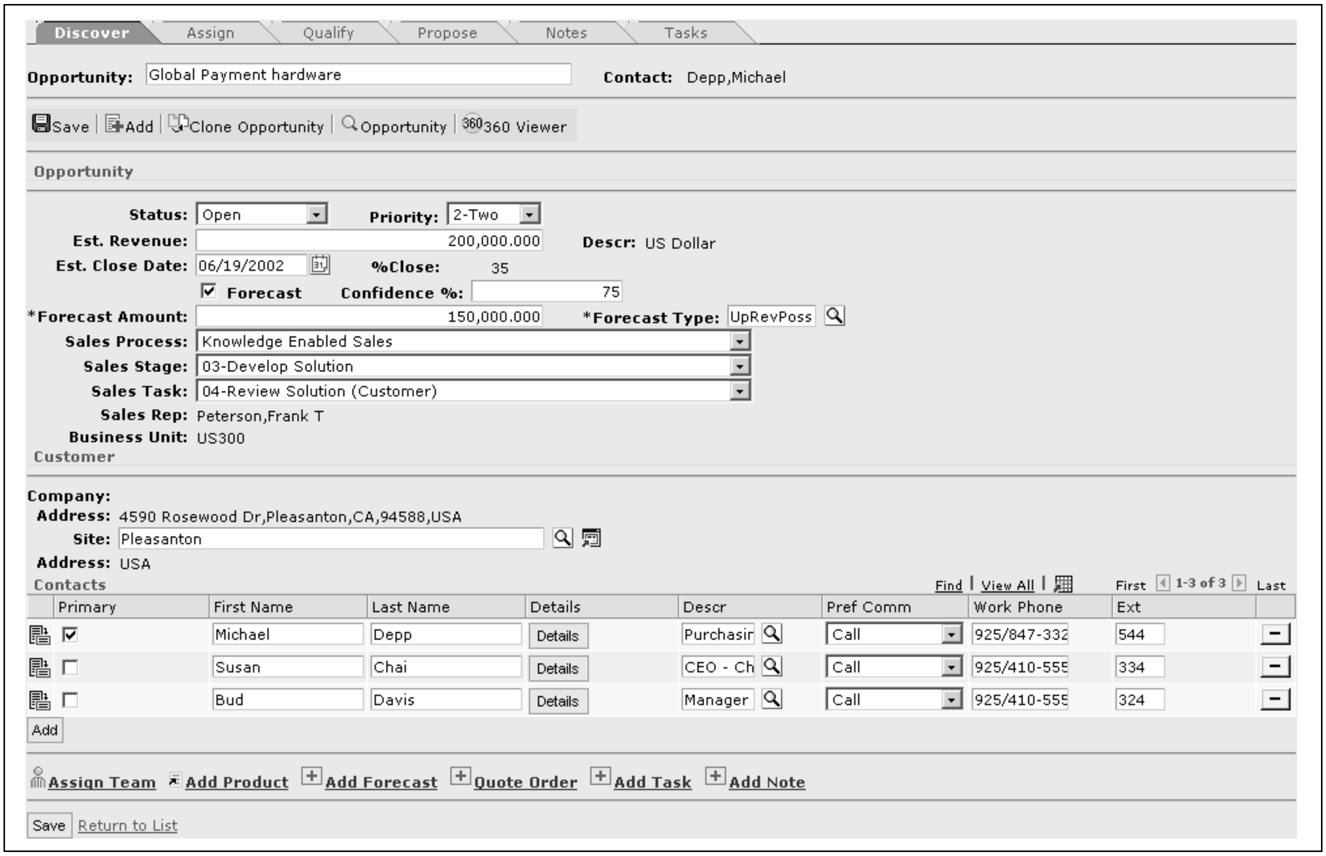
OK

Click to save the opportunity.

To transfer directly to the new opportunity upon successful conversion, select the Transfer to Opportunity check box before clicking OK.

Managing Opportunities in Mobile Sales

Access the Discover page.



Discover page for opportunities on a laptop computer

The Opportunity component:

- Provides the user with sales opportunity's details, including the name, status, and priority of the opportunity as well as the customer's name, address, and contact people.
- Enables the user to assign the opportunity to a sales representative.
- Enables the user to associate an opportunity with a source campaign.
- Enables the user to add the specific products, quantities and prices on a proposal.
- Enables the user to enter notes and attachments for the lead.
- Enables the user to create and track sales tasks required for opportunity follow up and sale closure.
- Providesthe user with PeopleSoft Enterprise Order Capture functionality if the customer has purchased PeopleSoft Enterprise Mobile Order Capture.

See Also

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

Cloning Leads and Opportunities In Mobile Sales

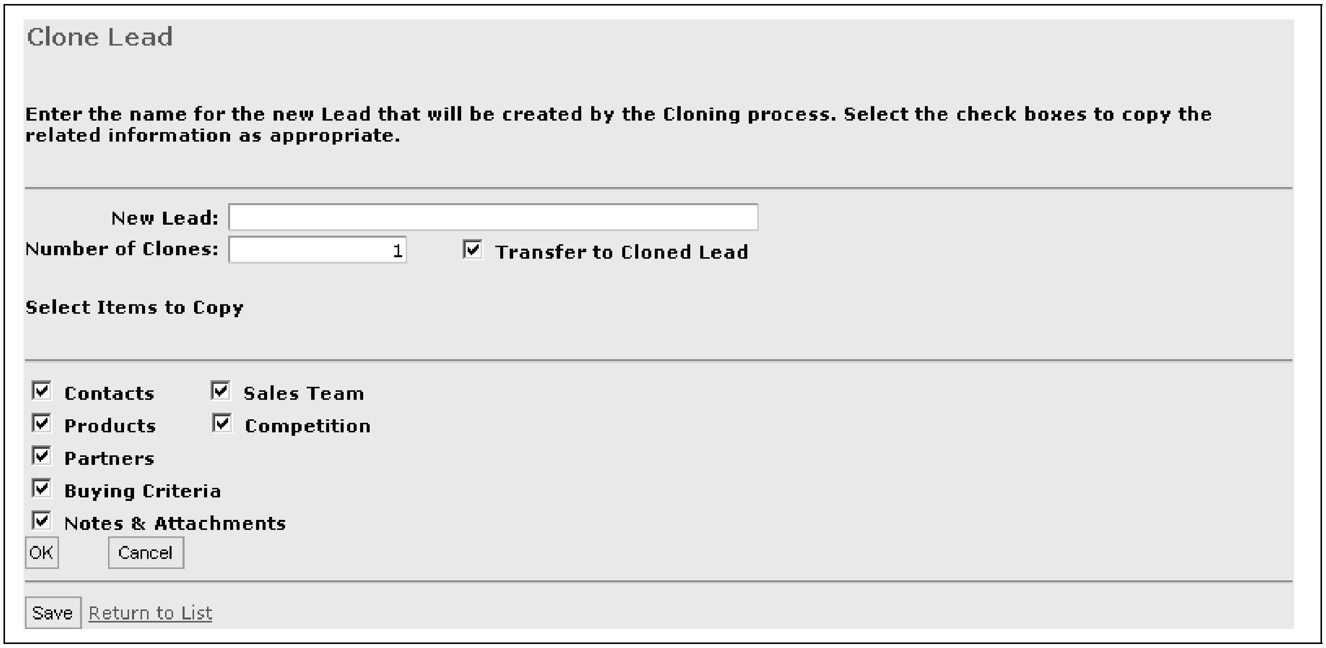
You may clone an existing lead or opportunity in two ways:

- For leads, access the Leads List page, and then click the Edit This Sales Lead button to the left of the lead that you want to copy.

  The Discover page of the Leads details component appears. Click the Clone Lead toolbar button.

- For opportunities, access the Opportunities List page, and click the Edit This Sales Opportunity button to the left of the opportunity that you want to copy.

  The Discover page of the Opportunities details component appears. Click the Clone Opportunity toolbar button.



Clone Lead page on a laptop computer

New Lead or Opportunity Name	Enter a name or description for the new lead or opportunity that you want to create.
Number of Clones	Enter the number of copies that you want to make from the original lead or opportunity. The system will create that number of identical clones of the original and append the clone number to the lead description.
Transfer to Cloned Lead (or **Transfer to Cloned Opportunity**)	Select to transfer to the new cloned lead or opportunity when you click OK. If you do not select this check box, the system returns you to the original lead or opportunity from which you were copying. If you are making more than one cloned copy and you select this check box, the system takes you to the last cloned item. Each cloned item is available from the list pages for you to edit.
Select Items to Copy	Select the data that you want to copy from the original to the clone.

Closing Leads

To close a lead, access the Lead details component Discover page and enter the appropriate status, either *Closed* or *Closed - Duplicate.* You may also close a lead by setting the status to *Turnback* When this status is selected, a Reason field displays on the page. You must select a reason that the lead was turned back before saving the page.

Closing Opportunities

To close an opportunity, access the Opportunities details component Discover page and enter the appropriate status, either *Closed - Won* or *Closed - Lost.* If the opportunity is Closed — Lost, you must enter comments and other data regarding the loss before saving the page. Also, you must review the forecast items and either select or clear the Forecast check box to keep them in or remove them from the forecast, respectively.

After you close the opportunity, the system displays the actual close date and actual revenue on the Close tab of the Opportunities List page for the opportunity.

Status Values are *Closed - Won* and *Closed - Lost.*

Comment Enter a reason for the win or loss.

Actual Revenue Displays the actual revenue from the closed - won opportunities.

An actual revenue amount is required to close the opportunity successfully.

Actual Close Date Enter the close date; the system's current date is the default.

Fallout Reason This field appears only for closed - lost opportunities. You must select a reason for why the sale was lost. Define fallout reasons on the Fallout Reason page.

Entering a fallout reason helps to track and identify patterns of losses.

Forecast Select for each item that you want to include in forecasting from the closed opportunity. Be sure that the check box is cleared for all items that you do *not* want to include in forecasting.

Items from a closed - lost opportunity that remain in the forecast show up as leaks.

Working with Forecasts

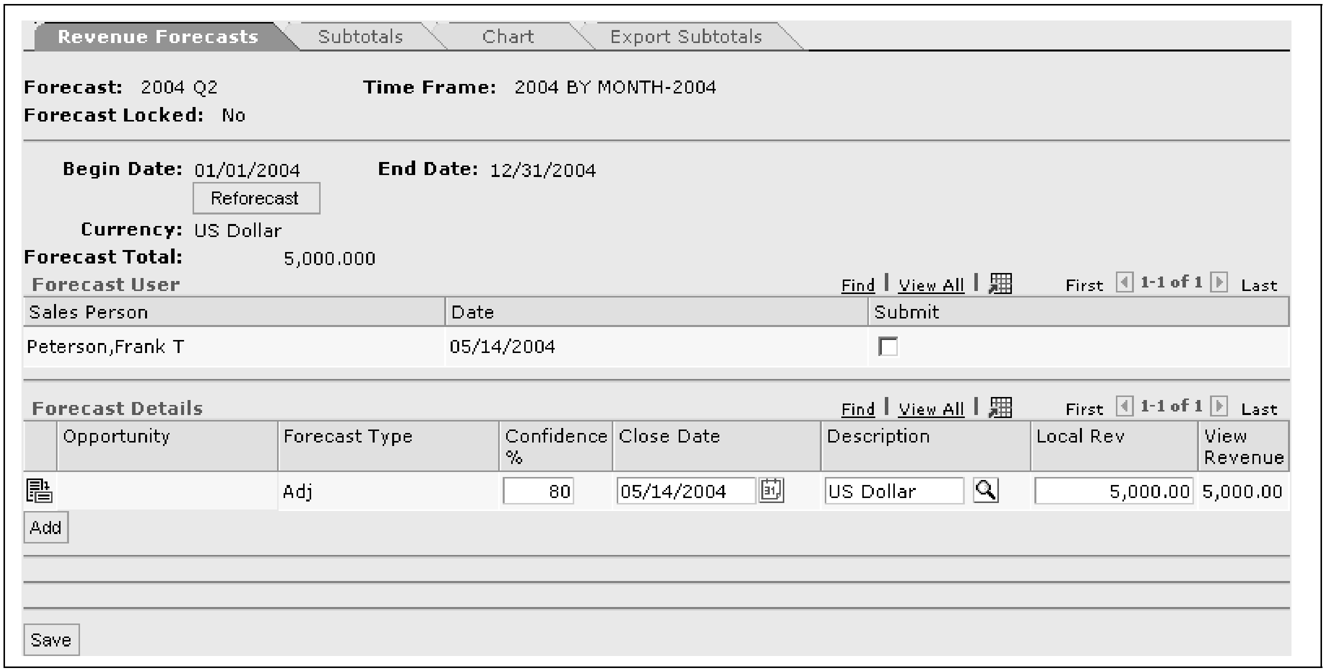
This section illustrates how to manage Forecasts and export Forecast subtotals.

Pages Used to Manage Forecasts

Page Name	Object Name	Navigation	Usage
Revenue Forecasts	RSFM_REV_ENTER	CRM, Forecasts, Select a Forecast, Revenue Forecasts.	View and manage revenue forecasts.

Using Forecasts on a Laptop

Access the Revenue Forecasts page.



Revenue Forecasts page on a laptop computer

The mobile Forecast component:

- Displays only the revenue forecast.
- Reflects all currencies established as part of the data synchronization rules.
- Provides flexibility in editing the data.

  In the online Forecast component, you can't change the data once you've selected the Submitted check box and saved it. In the mobile application, you can clear the check box and change the data, as long as you haven't performed synchronization
- Provides detail of forecast data for individual salespeople.

Exporting Forecast Subtotals

Forecast subtotals can be exported to an Excel spreadsheet by accessing the Export Subtotals page and clicking on the Export Subtotals icon.

CHAPTER 7

Using PeopleSoft Enterprise Mobile Account Planning

PeopleSoft Enterprise Mobile Account Planning enables sales professionals to build and manage highly integrated relationships with organization including the sale of products and services.

Note. PeopleSoft Enterprise Mobile Account Planning is not available on a PDA.

Understanding Transactions in PeopleSoft Enterprise Mobile Account Planning

PeopleSoft Enterprise Mobile Account Planning delivers much of the functionality of PeopleSoft Enterprise Account Planning to the laptop. The functionality that is available on a laptop computer may differ depending on the device and the permissions set by the administrator.

The dataset rules that are defined for the user ID and role determine the set of data loaded onto the laptop.

Object	Actions Available
Account Planning Details	View Account Plans in detail with read-only access on a laptop computer.
Account Team	View team members at account level as well as account plan level on a laptop computer.

Working with Accounts

In this section we explain how to:

- View account plans.
- View account teams.

Pages Used to View Account Information

Page Name	Object Name	Navigation	Usage
Account Planning Details	RSPM_PLANNING	• Company, Account Plans tab, Account Planning Details Person, Account Plans tab, Account Planning Details • Sales Homepage, Account Plan button, Account Planning Details	View each account plan in detail with read-only access on a laptop computer.
Account Team	RDM_COMPANY_2	• Company, Account Team • Person, Account Team	View each person or company associated with an account team with read-only access on a laptop computer.

Viewing Account Plans

Access the Account Planning Details page.

Account Plan Details page on a laptop computer

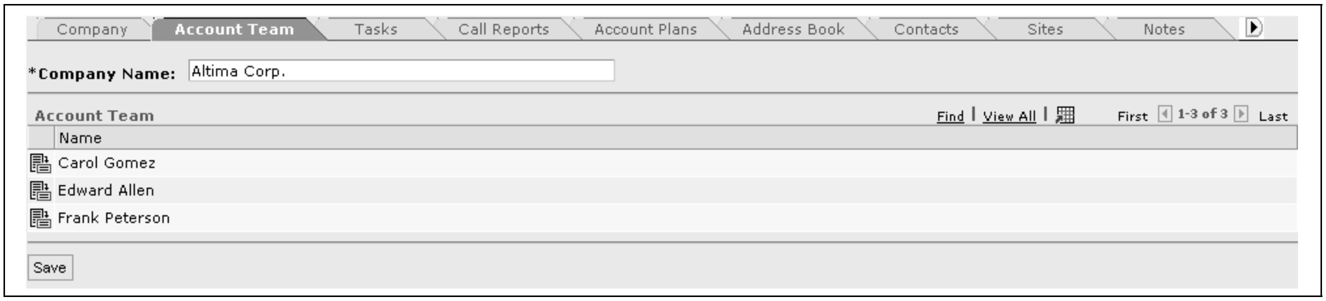
The mobile account planning component:

- Provides the user with view access to account plan details on a laptop.
- Enables the user to view multiple account plans, with start and end dates, for a company on a laptop.
- Provides the user with view access to account team members at the account level.

- Provides the user with view access to account plans for a consumer on a laptop.
- Provides the user with view access to plan details, objectives, and goals.
- Enables the user to view and add tasks with a start date within the account plan's start and end dates.
- Enables the user to view and add notes to an account plan.

Viewing Account Teams

Access the Account Team page.



Account Team page from the Company component.

The mobile Account Team page:

- Provides the user wtih view access of account team members for a consumer.
- Provides the user with view access of account team members for a company.

See Also

PeopleSoft Enterprise Strategic Account Planning 8.9 PeopleBook

CHAPTER 8

Using PeopleSoft Enterprise Mobile FieldService

This chapter provides an overview of PeopleSoft Enterprise Mobile FieldService and discusses how to:

- Manage service orders on a mobile device.
- View service inventory on a mobile device.

Note. The pages in the following sections represent pages viewed on a laptop. PDA pages have a different layout showing fewer fields because of limited space.

Understanding Transactions in Mobile FieldService

PeopleSoft Enterprise Mobile FieldService delivers a condensed version of PeopleSoft Enterprise FieldService to the mobile device.

Object	Actions Available on Mobile Devices
Service Order Detail	• Add a new service order. • View service order detail. • Change status or priority. • Select a line. • Merge with an existing service order. • Copy an existing service order.
Activity Details	• View or update the status or priority of activity. • View or edit planned start date, end date, start time, end time.
Installed Products	View the service order history for an installed product, including materials that were used or removed.
Time Material Expense	View or enter time, expense, and material information.
My Inventory	View item ID, description, quantity and unit of measure for items on a technicians truck.

Managing Service Orders

PeopleSoft Enterprise Mobile FieldService provides filtering, sorting and searching capabilities for service order selection on the mobile device. Data distribution and user rules determine the service orders that are delivered to the mobile device during synchronization.

Note. Only service orders assigned to the tech using the mobile device are downloaded during synchronization.

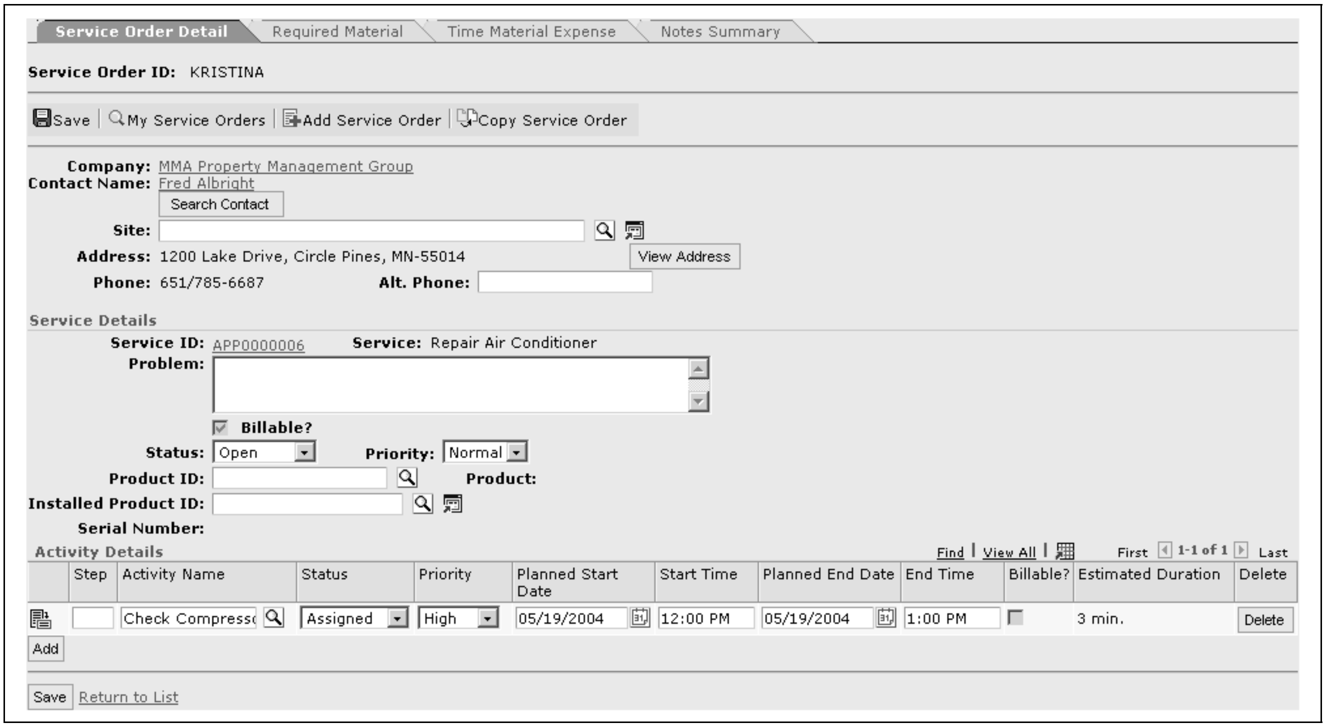
Note. Because mobile devices have limited processing power, storage capacity, and display space, mobile computing is different from online tethered computing.

Pages Used to Manage Service Orders

Page Name	Object Name	Navigation	Usage
Service Order Detail	RFM_SO_TECH_2	My Service Orders	Create or review service orders.
Activity Details	RFM_SO_TECH_2	Click the drill-down icon for the activity you wish to view.	Enter detailed information about a service order activity.
Installed Products	RFM_INST_PRODUCT	CRM, My Service Orders Select the Installed Product ID link.	View the service order history for an installed product, including materials that were used or removed.
Time Material Expense	RFM_SO_TECH_2	CRM, My Service Orders Select the Time Material Expense tab.	Record time, material and expense information.

Creating Service Orders

Access the Service Order Detail page.



Service Order Detail page

Merge SO#

This field is used if a service order has been created online by a dispatcher/agent and the technician hasn't synchronized with the database. The technician can create a new service order the mobile device specifying the service order ID that was given to them by the dispatcher as the merge service order ID. Upon synchronization, the data that was entered on the added mobile service order will be merged with the original service order.

Company or Consumer

Enter the name of the company or consumer requesting service.

Contact Name

Enter the name of the person who placed the service request.

Search Contact

Click this button to access the BO Lookup page, where you can select the contact for the service order.

Site

Enter the site where the requested service will be performed.

Address

If you select a customer that is associated with a primary ship-to address (specified in the Customer record), the system automatically populates this field with that address when you select the customer. Later, if you select a site and this site is also associated with a primary ship-to address (specified in the Site record), the system populates this field with that address and overwrites any current address.

View Address

Click this button to access the Address Information page, where you can view or select the address where the requested service will be performed and the phone number.

Phone

Displays the phone number of the contact.

Alt. Phone

Enter the alternate phone number of the contact. The alternate phone number is stored only with the service order and can be used if there is an alternate phone that needs to be tracked for this service order.

Filter
If there are multiple technicians assigned to the service order, this check box is available. When you first come into the page, it will only display the assigned activities. If you check the check box, it will display all activities.

Note. You can only update activities assigned to you.

Service
Select the requested service.

Problem
Use this free-form field to enter any additional information about the service or problem.

Billable
Indicates that some portion of the time, materials, and expenses that are associated with the service order can be billed to the customer.

Status
Select the current status of the service order.

Priority
Select the current priority that is associated with the service order.

Product ID
Enter the product ID that requires service. Before you can specify a product ID, the product must be established in the system.

Serial Number
The serial number is automatically displayed when a installed product ID is selected.

Step
Displays the order in which activities are to be completed.

Activity Name
Displays the activity name.

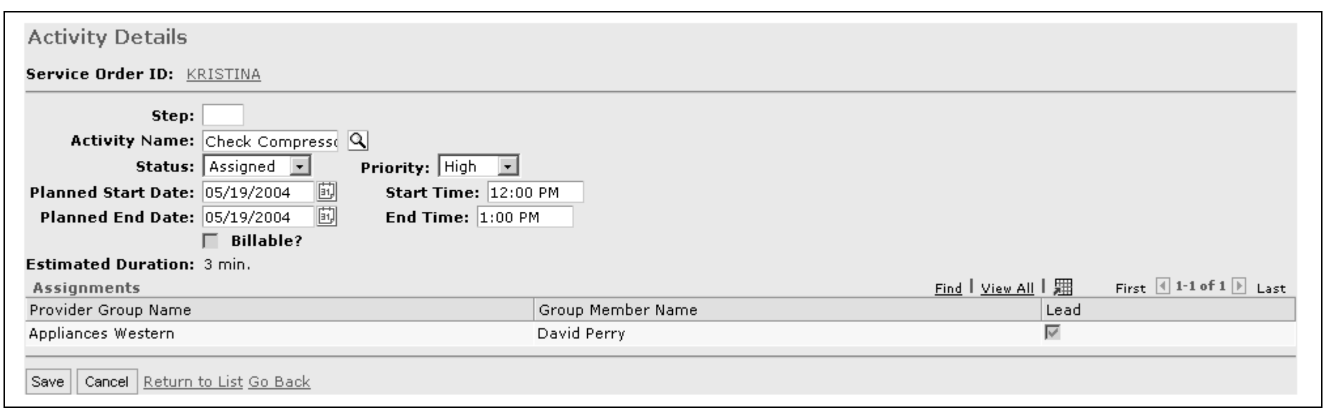
Status
Select the current status of the activity.

Priority
Select the current priority that is associated with the service order: *High, Low, Normal,* or *Urgent.*

Planned Start Date, Start Time, Planned End Date, End Time
Enter estimated dates and times based on technician and material availability, as well as the estimated duration to perform the work.

Creating Activities

Access the Activity Details page.



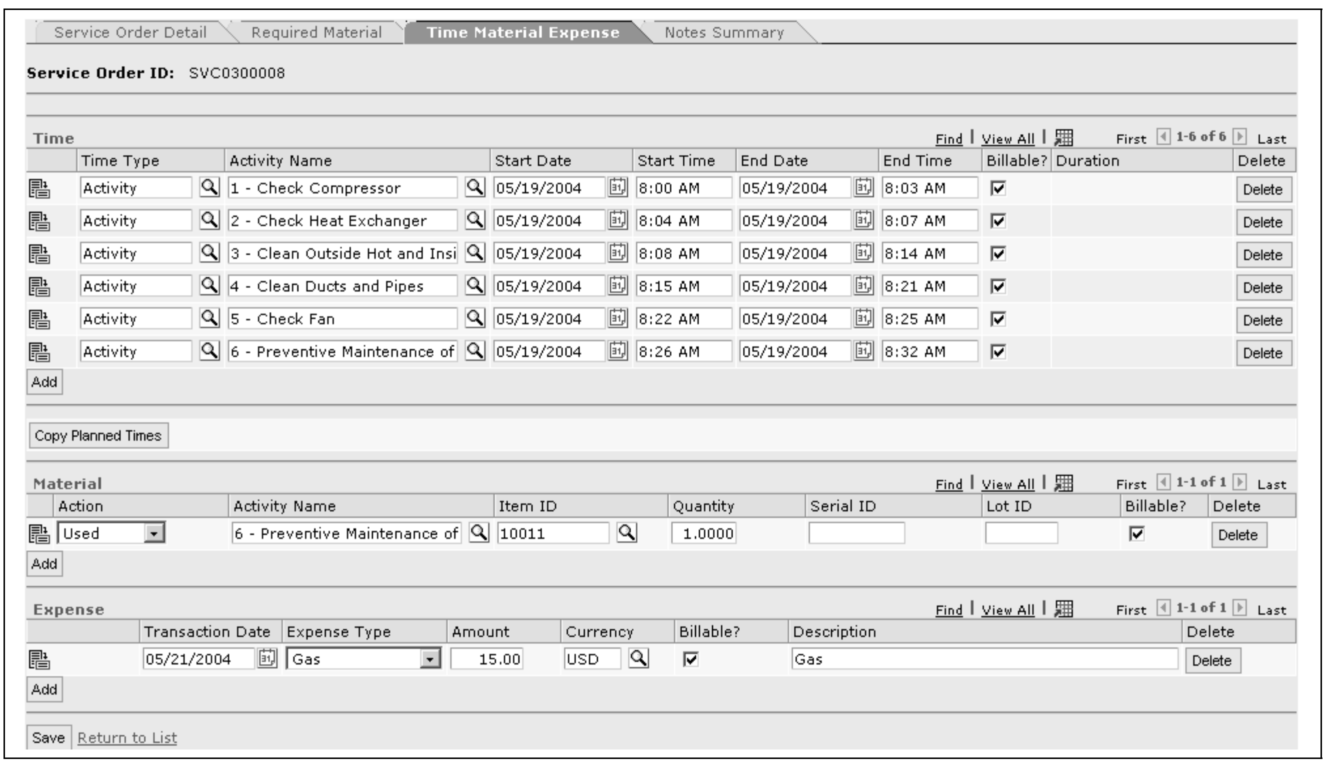
Service Order Line Detail page

Service Order ID
Displays the service order ID.

Activity Name	Displays the activity name.
Status	Select the current status of the activity.
Priority	Select the current priority that is associated with the service order: *High, Low, Normal,* or *Urgent.*
Planned Start Date, Start Time, Planned End Date, End Time	Enter estimated dates and times based on technician and material availability, as well as the estimated duration to perform the work.
Billable	Indicates that some portion of the time, materials, and expenses that are associated with the service order can be billed to the customer.
Estimated Duration	Displays the estimated duration of the activity.
Provider Group Name	Displays the name of the provider group that will perform the requested service work
Group Member Name	Displays the name of the provider group member (technician) who will perform the requested service work.
Lead	Indicate that the group member in the Technician Name field of the row is the technician who is responsible for the service order activity.

Managing Time, Materials, and Expenses on a Mobile Device

Access the Time Material Expense page.



Time Material Expense page

Time

Click this icon to access the Time page where you can enter more information for the time being reported.

Time Type

Displays the time types defined by the user in Setup CRM, Product Related, FieldService, Timetypes.

Activity Name

Select the activity for which you want to record time. You can choose all activities if you don’t want to record time for each.

Start Date, Start Time, End Date, End Time

Enter dates and times for the activity.

Billable?

Select this check box if the time is billable to the customer.

Duration

Displays the difference between the start and end of the time entry. The system displays a grand total at the bottom of the page.

Delete

Click the delete button to remove the time recorded on this line.

Add

Click the add button to add a line to record time.

Copy Planned Times

Click to copy the existing activities and their planned times into the time log. Use this feature to reduce data entry if the actual time is the same as the planned time. If there are any variations in the planned and actual times, you can update or delete the entries and add new entries.

Material

Click this icon to access the Material page where you can enter additional information for the material.

Activity Name

Enter the activity name that the material is to be used for.

Item ID

Enter the item ID of the material used.

Action

Select the action for the material. Available actions are *Used* and *Remove*.

Quantity

Enter the quantity of the material.

Serial ID

Enter the serial ID for the material. A serial ID is only required if the item is serial controlled.

Lot ID

Enter the lot ID for the material. A lot ID is only required if the item is lot controlled.

Billable?

Select this check box if the material is billable to the customer.

Delete

Click the delete button to remove the material line.

Note. Once you have synced you will no longer be able to delete any materials that have been reported.

Add

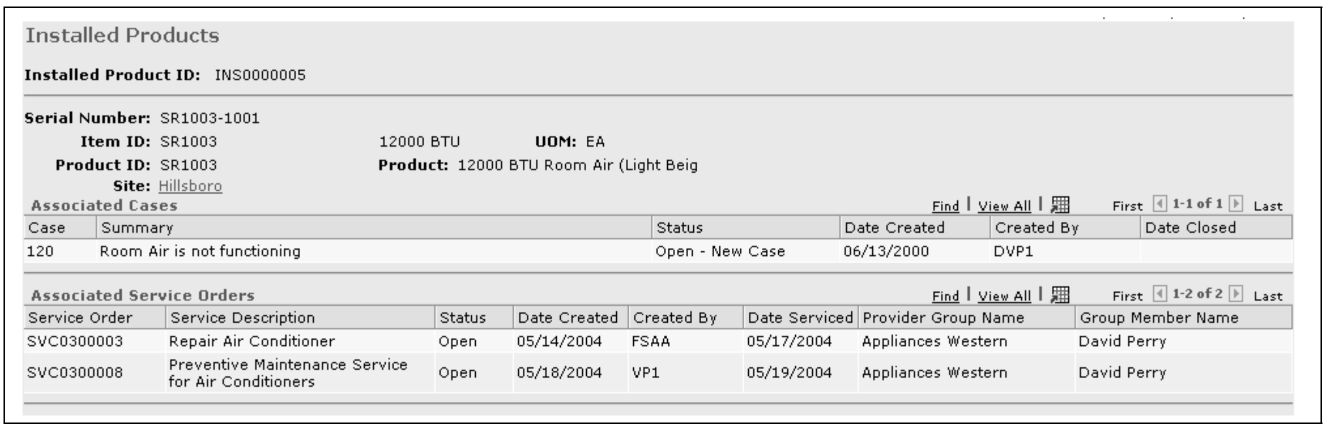
Click the add button to create a new material line.

Expense

	Click this icon to access the Expense page where you can enter additional information for the expense entry.
Transaction Date	Enter the date for the expense entry.
Expense Type	Select an expense type.
Amount	Enter the amount of the expense.
Currency	Select the currency of the expense.
Billable?	Read only check box that expense if the time is billable to the customer.
Description	Enter a description of the expense.
Delete	Click the delete button to remove the expense line.
Add	Click the add button to create a new expense line.

Viewing Service History for Installed Products on a Mobile Device

Access the Installed Products page.



Installed Products

Installed Product ID: INS0000005

Serial Number: SR1003-1001
Item ID: SR1003 12000 BTU **UOM:** EA
Product ID: SR1003 **Product:** 12000 BTU Room Air (Light Beig
Site: Hillsboro

Associated Cases — Find | View All | First 1-1 of 1 Last

Case	Summary	Status	Date Created	Created By	Date Closed
120	Room Air is not functioning	Open - New Case	06/13/2000	DVP1	

Associated Service Orders — Find | View All | First 1-2 of 2 Last

Service Order	Service Description	Status	Date Created	Created By	Date Serviced	Provider Group Name	Group Member Name
SVC0300003	Repair Air Conditioner	Open	05/14/2004	FSAA	05/17/2004	Appliances Western	David Perry
SVC0300008	Preventive Maintenance Service for Air Conditioners	Open	05/18/2004	VP1	05/19/2004	Appliances Western	David Perry

Installed Products on a laptop computer

The Installed Products page provides:

- Provides the user with Installed product detail information.
- Enables the user to access related cases.
- Provides the user with view access to associated service orders.

Viewing Service Inventory on a Mobile Device

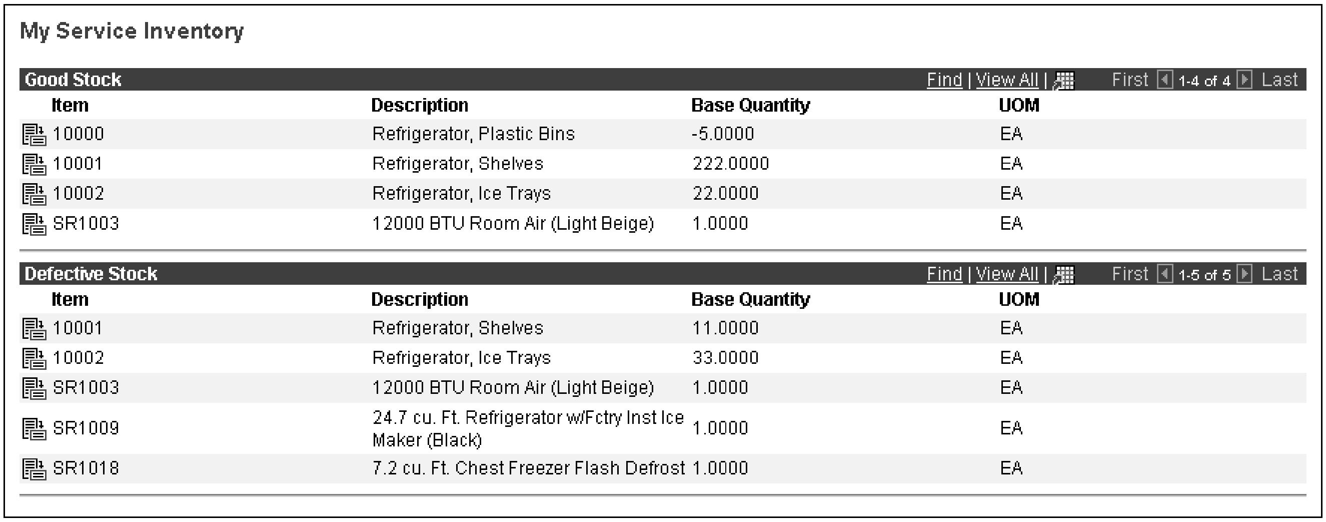
This section discusses how service inventory in formation is viewed on a mobile device.

Pages Used to View Inventory

Page Name	Object Name	Navigation	Usage
My Service Inventory	RFM_TRUCK_INQ	My Service Inventory	View good and bad inventory on a technicians truck.

Viewing Service Inventory on a Mobile Device

Access the My Service Inventory page.



My Service Inventory

Good Stock — Find | View All | First 1-4 of 4 Last

Item	Description	Base Quantity	UOM
10000	Refrigerator, Plastic Bins	-5.0000	EA
10001	Refrigerator, Shelves	222.0000	EA
10002	Refrigerator, Ice Trays	22.0000	EA
SR1003	12000 BTU Room Air (Light Beige)	1.0000	EA

Defective Stock — Find | View All | First 1-5 of 5 Last

Item	Description	Base Quantity	UOM
10001	Refrigerator, Shelves	11.0000	EA
10002	Refrigerator, Ice Trays	33.0000	EA
SR1003	12000 BTU Room Air (Light Beige)	1.0000	EA
SR1009	24.7 cu. Ft. Refrigerator w/Fctry Inst Ice Maker (Black)	1.0000	EA
SR1018	7.2 cu. Ft. Chest Freezer Flash Defrost	1.0000	EA

My Service Inventory on a laptop computer

The My Service Inventory page:

- Provides the user with view access to good and bad inventory items on a technicians truck.
- Provides the user with access to product details.

PART 3

PeopleSoft Enterprise Mobile Sales for WAP Phones

CHAPTER 9

Understanding Enterprise PeopleSoft Mobile Sales for WAP Phones

PeopleSoft Enterprise Mobile Sales for WAP is part of the PeopleSoft Enterprise Mobile Sales solution. PeopleSoft Enterprise Mobile Sales for WAP enables the mobile sales professional to access Sales related information from the PeopleSoft Enterprise Sales database and display it on their WAP-enabled devices.

This chapter discusses:

- Features.
- Prerequisites for Implementation.

Features of PeopleSoft Enterprise Mobile Sales for WAP

This section discusses how users of PeopleSoft Enterprise Mobile Sales for WAP can interact with:

- Contacts
- Companies
- Tasks
- Leads
- Opportunities

Contacts

Users access the Contacts page from the PeopleSoft CRM main menu screen and are prompted to enter the first few characters of the contact's last name. A list of contacts is returned that matches the character string provided. From the Contact List screen, users can access a contact's phone and address information. They can view and edit the information, or they can make a telephone call using one of the contact's phone numbers.

See Also

Chapter 11, "Using PeopleSoft Enterprise Mobile Sales for WAP Phones," Viewing or Modifying Contact Information, page 87

Companies

When mobile users click the Companies link from the PeopleSoft CRM main menu screen, they are presented with a setID filter menu. This filter limits the search results to only those companies that are in the business unit associated with the selected setID. After selecting a setID, the user can further limit the search results by entering the first few characters of the company name.

Note. When mobile users represent multiple business units within a particular company, they can view and select those different business unit entities from the setID Filter screen.

See Also

Chapter 11, "Using PeopleSoft Enterprise Mobile Sales for WAP Phones," Searching for Companies, page 89

Tasks

From the Tasks link on the PeopleSoft CRM main menu screen, mobile users can view their PeopleSoft Enterprise CRM task calendars. They can navigate to view details, such as time of appointment, contact name, and type of task. A direct link is provided if the task is associated with a lead or opportunity.

See Also

Chapter 11, "Using PeopleSoft Enterprise Mobile Sales for WAP Phones," Viewing Tasks, page 91

Leads

The Leads link takes mobile users to the Leads Detail screen where they can view or edit a lead's status, type, and rating. From there, they can navigate to view company details, contacts, and opportunities.

See Also

Chapter 11, "Using PeopleSoft Enterprise Mobile Sales for WAP Phones," Viewing or Modifying Leads, page 92

Opportunities

The Opportunities screen enables mobile users to remotely manage their sales opportunities. They can either view or edit fields, such as Status, Estimated Revenue, Confidence, Estimated Close Date, Forecast, and Forecast Type.

See Also

Chapter 11, "Using PeopleSoft Enterprise Mobile Sales for WAP Phones," Viewing or Modifying Opportunities, page 94

Implementation Requirements

This section discusses the following requirements for PeopleSoft Enterprise Mobile Sales for WAP Phones:

- Platform requirements
- Service provider requirements

Platform Requirements

The variety of wireless devices available in today's marketplace and the speed at which the technology changes require that our documentation be general when referring to wireless devices as platforms for PeopleSoft Enterprise Mobile Sales for WAP Phones.

PeopleSoft Enterprise Mobile Sales for WAP Phones requires:

- The wireless devices on which you intend to run the application must be WAP compliant.
- Digital wireless telephones must be minimally equipped with the Openwave Systems, Inc. 4.1 microbrowser, supporting WML 1.1 or later.

Note. For a list of PeopleSoft supported mobile browsers, refer to the “Supported Platforms” section on*Customer Connection*.

See Also

Chapter 11, “Using PeopleSoft Enterprise Mobile Sales for WAP Phones,” page 83

Service Provider Requirements

Before implementing PeopleSoft Enterprise Mobile Sales for WAP Phones, you must establish wireless data service with an appropriate wireless service provider.

CHAPTER 10

Setting Up PeopleSoft Enterprise Mobile Sales for WAP

This section provides overviews of PeopleSoft Enterprise Mobile Sales for Wireless Access Protocol (WAP) Phones setup and WAP terminology and discusses how to use permissions.

Understanding PeopleSoft Enterprise Mobile Sales for WAP Phones Setup

Before you can set up PeopleSoft Enterprise CRM Mobile Sales for WAP phones, you need to:

Note. Installation information is provided in the PeopleSoft Enterprise CRM installation guide, which is available on Customer Connection.

- Include PeopleSoft Enterprise Sales and PeopleSoft Enterprise Mobile Sales as part of the installation.
- Ensure that the wireless device on which you intend to run PeopleSoft Enterprise Mobile Sales for WAP Phones supports WAP capabilities.
- PeopleSoft Enterprise Mobile Sales for WAP Phones must be installed on a web server that is open to the internet.

  This enables the WAP gateway to locate the web server from the internet. The WAP gateway is usually located at and operated by the wireless service provider.
- Properly define permissions.

  Note. When you define user IDs and passwords for mobile sales users, consider keypad usability. For example, a user ID or password that contains special characters, extensive use of upper and lower character cases, or alphanumeric combinations can significantly lengthen the sign-in process. Due to the limited text input capability of WAP devices, user IDs that are short and all lowercase tend to be more user friendly.

See Also

Chapter 11, "Using PeopleSoft Enterprise Mobile Sales for WAP Phones," Display Controls and Search Parameters, page 84

Chapter 11, "Using PeopleSoft Enterprise Mobile Sales for WAP Phones," Navigation, page 83

Understanding WAP Terminology

This section defines terms related to WAP terminology.

Wireless Application Protocol (WAP) A communications protocol and application environment for the deployment of information resources, advanced telephony services, and internet access from mobile devices.

Wireless Markup Language (WML) A structured XML document template used to define the content that appears on a WAP-compliant mobile device. In HTML, one page is loaded and appears in a browser. A WAP device, on the other hand, does not load a page, but instead a deck of cards.

Card A WML document that contains both content and navigational controls. A WAP device displays only one card at a time.

Note. In this document, PeopleSoft refers to cards as *screens.*

Deck A collection of cards that are sent to the WAP browser as a single unit. A compiled deck cannot exceed approximately 1400 characters.

Using Permissions

This section provides an overview of delivered permission lists and discusses how to modify permissions lists.

Understanding Delivered Permission Lists

Two WAP-related permission lists are delivered with the application. Each permission list identifies PeopleSoft Enterprise Mobile Sales for WAP Phones web libraries (iScripts) and component interfaces that the user is authorized to access. Permission lists are assigned to roles and roles are assigned to users.

The following permissions lists are delivered with PeopleSoft Enterprise Mobile Sales for WAP Phones:

- CRWS1000

  This permission list contains the permissions necessary to access tasks, companies, and contacts. It also contains the permissions necessary to edit contacts.

- CRWS1100

  This permission list contains all CRWS1000 permissions, plus the ability to access and update leads and opportunities. It provides complete access to all features of the application.

Note. By default, CRWS1100 is assigned to the Field Sales Rep and Sales Manager roles, while CRWS1000 is assigned to the Field Service Engineer role.

Modifying Permission Lists

To modify user access to specific PeopleSoft Enterprise Mobile Sales for WAP Phones functions, perform one of the following:

- Modify the role definition by removing or adding permission lists.

- Modify the permission lists by enabling or disabling web libraries (“iScipts”).

Each user that signs into PeopleSoft Enterprise Mobile Sales for WAP Phones then sees the appropriate menu structure based on the security that you have defined.

To create a permission list that can view everything but is not allowed to update anything:

- Copy an existing permission list.
- Disable the edit transactions in the web library portion of the permission list.

To disable one or more of the main menu links in PeopleSoft Enterprise Mobile Sales for WAP Phones:

- Make a copy of the delivered permission list.
- Deny access for the selected web library in either permission list.

For example, you would follow these steps to remove the Tasks option from PeopleSoft Enterprise Mobile Sales for WAP Phones remove access for the iScript_taskSearch function.

Note. When modifying a permission list, you change access for all users who are assigned to roles to which the permission list is linked.

See Also

PeopleTools PeopleBook: PeopleTools Security

CHAPTER 11

Using PeopleSoft Enterprise Mobile Sales for WAP Phones

This chapter provides an overview of PeopleSoft Enterprise CRM Mobile Sales for Wireless Application Protocol (WAP) Phones and discusses how to:

- Sign in to PeopleSoft Enterprise Mobile Sales for WAP Phones.
- View or modify Contact information.
- Search for companies.
- View tasks.
- View or modify leads.
- View or modify opportunities.
- Sign out.

Note. PeopleSoft recommends that the wireless device come equipped with the Openwave microbrowser software version 3.1 or later.

See Also

Chapter 9, "Understanding Enterprise PeopleSoft Mobile Sales for WAP Phones," Platform Requirements, page 76

Understanding PeopleSoft Enterprise Mobile Sales for WAP Phones

In this section, we discuss:

- Navigation.
- Display controls and search parameters.
- Wireless telephone keypad usage.

Navigation

The following navigational tools within PeopleSoft Enterprise Mobile Sales for WAP Phones help you to move quickly from screen to screen.

Links and Numbers Appear throughout the application screens. Some devices display links in brackets:*[link name]*; however, links might not be bracketed in every microbrowser. Use the scroll or arrow key to move the cursor to a link, and click the OK or Yesbutton to access the link.

Other devices display a number next to the link. Optionally, you can use the keypad to select the number of the link that you want to access.

More Indicates that additional items are available. Click this link for the next set of items to appear. If the phone uses a WAP browser from Openwave then you can use the "9" as a hot key to go to the next page of items.

Sign Off Prompts you to confirm that you want to end the PeopleSoft Enterprise Mobile Sales for WAP Phones session. If you click OK, the Sign-in screen appears.

Back Usually appears in the bottom right corner of the screen unless overridden by the microbrowser's character control button in a data entry screen. Also, if you are positioned on a hyperlink the back button may not be available. The Back button returns you to the previous screen. Most phones also have a dedicated (hardwired) back button.

Note. Note. The Back button does not appear on some phone browsers if an input field is present. In this case, use the dedicated (hardwired) back button of the browser.

Display Controls and Search Parameters

PeopleSoft Enterprise Mobile Sales for WAP Phones predefines the total allowable number of search items that appear and the total number of rows to return. If the search yields more than 300 results, narrow the search criteria.

If the system can return only one record in response to the request, it displays the record immediately instead of requiring you to select it from a list.

Return Codes

Return codes on the phone generally take the following form: <message> (18050, y)

Parameter	Description
<message>	Description of the situation encountered.
18050	PeopleSoft Enterprise Mobile Sales for WAP Phones message set.
Y	PeopleSoft Enterprise Mobile Sales for WAP Phones message number.

Note. You can find descriptions of these messages in the Message Catalog. Sign in to PeopleSoft Enterprise CRM with a user ID that is authorized to view the Message Catalog in PeopleTools. You can change the message string.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Tools and Utilities

Wireless Telephone Keypad Usage

To use the PeopleSoft Enterprise Mobile Sales for WAP Phones, you must understand the functionality of the wireless telephone's keypad.

Note. Because different Web-enabled cellular phones have different keypad designs and microbrowser functionality, we discuss keypad usage in general terms. Consult the device's documentation for further details.

On most phones, you can enter a letter by pressing the corresponding key until the character appears. For example, to enter the letter *"e"*, press *3* twice in quick succession. To enter the letter "*"z"*, press *9* four times in quick succession. Usually, by default, the first letter of a word is capitalized and the letters following are lowercase. When you enter a character using the phone keypad, the character remains highlighted for a moment before the cursor advances automatically to the next space. Continue tapping the key until the character that you want appears. You can wait for the cursor to advance automatically, or press the right arrow key (if available) to advance to the next space.

When presented with an entry field, use the device's character control button to gain access to additional characters. Some common options include:

ALPHA or alpha	Uppercase or lowercase alphabetic characters.
NUM	Numeric characters.
SYM	Sets of special symbols.
	SMART or smart
	Uppercase or lowercase alphabetic characters followed by the numerals and special symbols available in a single scroll of each key.

Note. Screenshots in the documentation might not reflect the application's exact appearance on the device. This is due to the high number of wireless devices available on the market, and the variety of screen sizes. This documentation shows all selections available on a particular screen. On the actual device, you might have to scroll down to see all available selections.

Signing In to PeopleSoft Enterprise Mobile Sales for WAP Phones

The sign-in procedure includes application security authentication. PeopleSoft Enterprise Mobile Sales for WAP Phones verifies user information so that sales users see only the leads and opportunities that they have been authorized to see:

- Non-sales users can see Contacts, companies, and task information only.
- Sales users who have the role of manager can view all the sales-related information for the sales users who report to them.

This section discusses how to:

- Sign into PeopleSoft Enterprise Mobile Sales for WAP Phones.
- Use the PeopleSoft CRM screen.
- Use the Support Menu screen.

Signing in to PeopleSoft Enterprise Mobile Sales for WAP Phones

To sign in to PeopleSoft Enterprise Mobile Sales for WAP Phones:

1. Enter the predefined URL for PeopleSoft Enterprise Mobile Sales for WAP Phones in the wireless device's microbrowser to initially access the PeopleSoft Sign-in screen. Once you reach the sign-in screen it is recommended that you bookmark that page to avoid having to enter the URL more than once.
2. Select LOGIN to confirm that you want to access PeopleSoft Enterprise Mobile Sales for WAP Phones.
3. (Optional) Select LANG (language) to access the Language Selection screen.

   Select the language that you want to define as the preferred language for the Sign-in screen. To return to the Sign-in screen without changing the language, select Link or click the phone's Back button.
4. Enter a valid User ID and Password when prompted to do so.

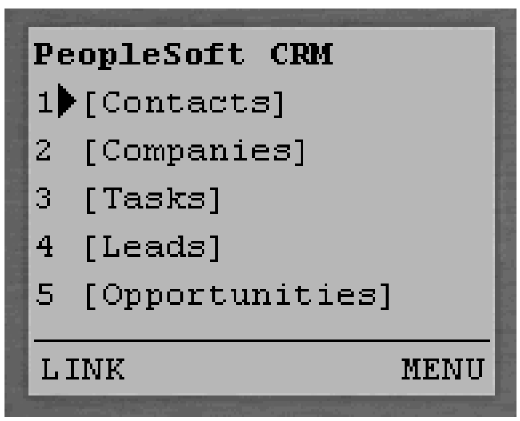
   User IDs and passwords are case sensitive.

   If an error occurs during the login process, an error message appears. Depending on the error type, you might be prompted to select LOGIN to return to the Sign-in screen, or you might be returned to the Sign-in screen. On most phones, scroll to see the entire error message.

   After you successfully sign in, the PeopleSoft CRM screen appears.

Using the PeopleSoft CRM Screen

The PeopleSoft CRM screen is the main screen in the PeopleSoft Mobile Sales for WAP Phones application.



PeopleSoft CRM screen

Select any one of the following options, and click OK.

Contacts
Select to access the screen where you can view and modify any Contact defined in the PeopleSoft CRM system.

Companies
Select to access the setID Filter screen, where you can do one of the following:

- Restrict the company (customer) search by setID to certain business units.
- Search all companies (customers) in the PeopleSoft Enterprise CRM system

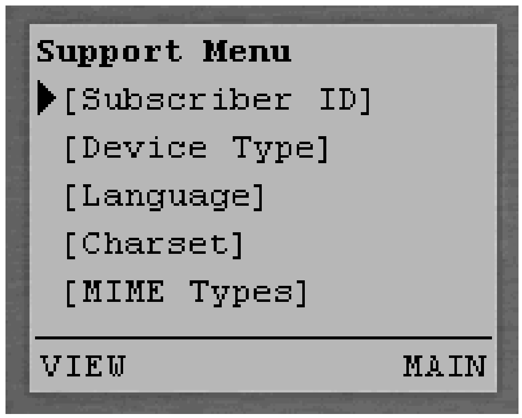
Tasks
Select to view tasks.

Leads
Select to access the Leads screen, where you can view or modify sales lead information.

Opportunities	Select to access the Opportunities screen, where you can view or modify sales opportunities.
Sign Out	Select to sign out.

Using the Support Menu Screen

You can access the Support Menu screen from the Mobile Sales screen with the options key on the right (this is usually MENU). The Support Menu provides information that might be useful when contacting PeopleSoft technical support.



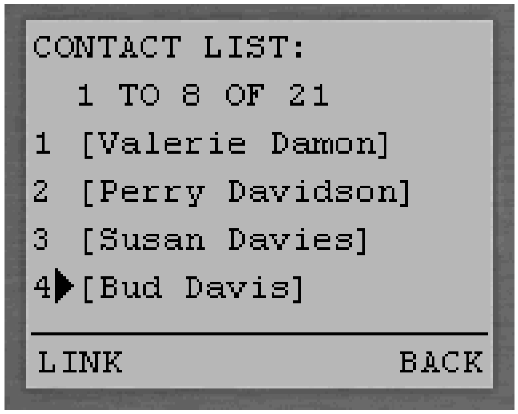
Support Menu screen

Select any one of the following options, and click VIEW to see the associated information:

Subscriber ID	Unique identifier associated with the phone user. This ID helps identify log entries associated with a particular user.
Device Type	Browser type and version and the WAP gateway type and version.
Language	Language defined for the phone (not as defined for the application). Phones purchased in different countries might have different languages defined.
Charset (character set)	Character set used by the phone. This set helps diagnose problems related to the phone’s display of certain characters.
MIME Types (Multipurpose Internet Mail Extensions types)	MIME types supported by the phone, which should include WML.

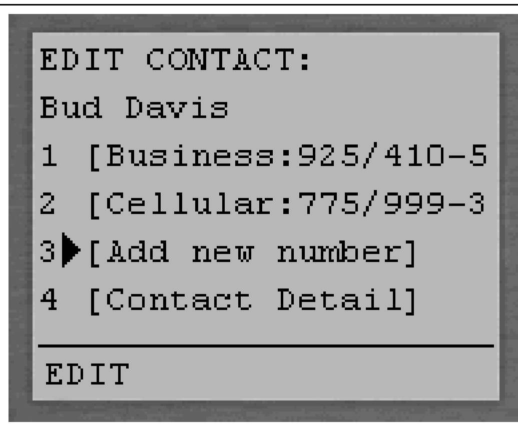
Viewing or Modifying Contact Information

Users manage Contact information using the Contact List screen, the Contact Detail screen, and the Edit Contact screen.



Contact List screen

Contact Detail screen



Edit Contact screen

To view Contact information:

1. Select Contacts from the PeopleSoft CRM screen.

   The Contact Search screen appears.

2. Enter the Contact’s full name to retrieve details for this Contact, or enter a partial last name to retrieve a list of matching Contacts.

   The Contact List screen displays a list of Contacts that meet the specified search criteria. Select the desired Contact’s name to view the details for that Contact.

Note. If there is only one Contact, the system immediately displays the Contact Detail screen for that Contact.

3. Select a Contact name from the list of names to view a Contact's details.

   There are several possible views of the Contact Detail screen shown above:

   - The Contact has multiple associated companies, in which case a Companies link appears.

     The destination screen for the Companies link is the Company List screen.

   - The Contact has a single associated company, in which case the name of the company appears as a link.

4. Click the link to view the company details.

   If the Contact has no associated companies, only the Contact's business number appears as a link.

   If the Contact is not associated with a company and no phone numbers have been assigned, then the only item that appears is the Contact's name.

To modify Contact information:

1. Access the Contact Detail screen as described in the previous steps.
2. Scroll down (or up) so that the black cursor arrow disappears entirely from the screen, and click the EDIT button.

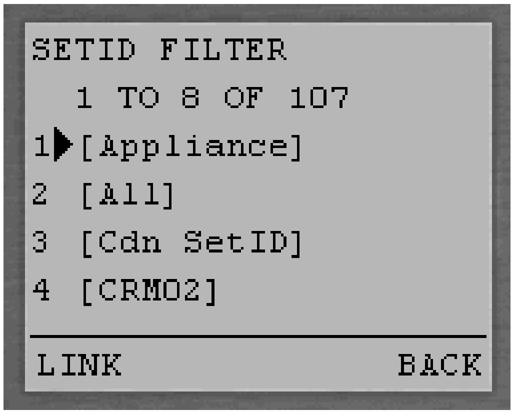
   The LINK button changes to the EDIT button; you are now in edit mode. The Edit Contact screen appears:

Business, Cellular, Home, FAX	Allows you to edit the phone number type, including extension (if desired), and country code. Save the changes.
Add new number	Allows you to add a new phone number. Select the phone type, enter the information, and save the addition.

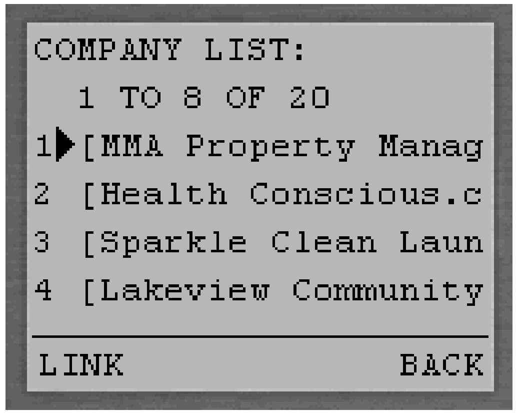
Note. When a phone number is changed or added, it is effective-dated using the current date.

Searching for Companies

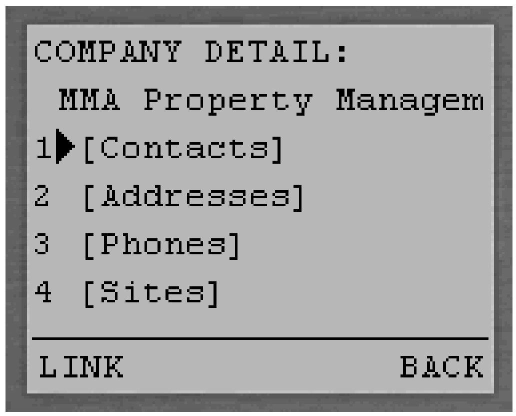
Users manage company information using the SetID Filter screen, the Company List screen, and the Company Detail screen.



SetID Filter screen



Company List screen



Company Detail screen

To locate company information:

1. Select Companies from the PeopleSoft CRM screen.

   The SetID Filter screen appears. The first selection is always the mobile user's default setID. The second item is always All and, when selected, enables an enterprise-wide search across all setIDs. The remaining setIDs are sorted in ascending order by the short description.

2. Select the applicable setID to access the Company Search screen.

3. Enter the full name of the company to retrieve details for that company, or enter a partial name to retrieve a list of matching companies.

   The Company List screen displays a list of companies that meet the specified search criteria.

   Note. If there is only one company, the system displays the Company Detail screen for that company.

4. Select the desired company to view the details for that company.

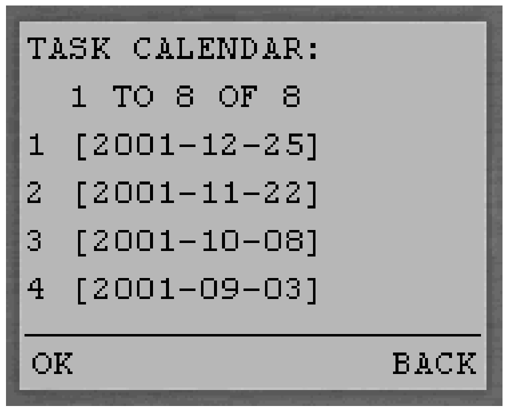
   The following options appear on the Company Detail screen:

Contacts	Takes you to the Contact List screen when multiple Contacts are defined for this company. If only one Contact is defined for the company, this link takes you directly to the Contact Detail screen.
Addresses	Displays the company nickname.
Main Menu	Takes you to the PeopleSoft CRM main menu screen.

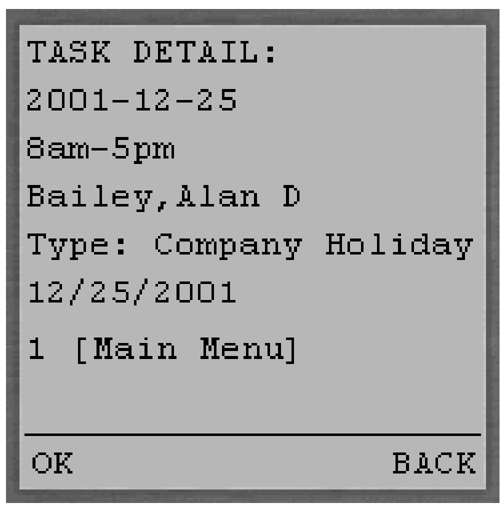
Viewing Tasks

In PeopleSoft Enterprise CRM, every worker defined in the system is associated with a monthly and daily calendar. Workers and managers can manually update the calendars to reflect daily tasks. In PeopleSoft Enterprise CRM Sales (WAP), system events can automatically update sales Contacts' calendars to reflect leads and opportunities. Similarly, in PeopleSoft Enterprise CRM FieldService, system events can automatically update technicians' calendars to reflect service order assignments.

Users manage task information using the Task Calendar screen and the Task Detail screen.



Task Calendar screen



Task Detail screen

To view task information:

1. Select Tasks from the PeopleSoft CRM screen.

   The Task Calendar screen displays all dates for which a task has been defined in the PeopleSoft Enterprise CRM System.

2. Select a specific date to access the Task Detail screen.

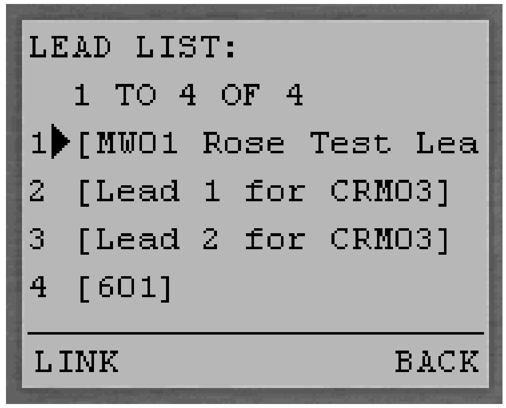
   Here you can view the date, Start and End times, Task Owner, Task type, and Task Subject of the task.

Note. The Task Details page has direct links to leads and opportunities if the Task is associated to a leads or opportunity. If the task is not associated to a lead or opportunity, they will not be visible.

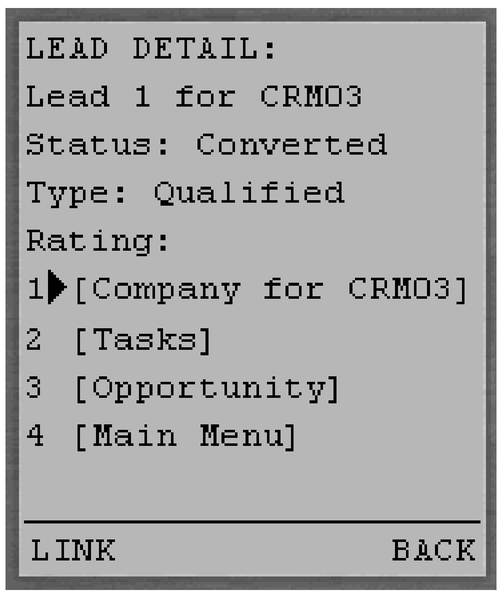
Viewing or Modifying Leads

You can modify lead information such as Type and Status. You can also convert leads to opportunities directly on a mobile phone.

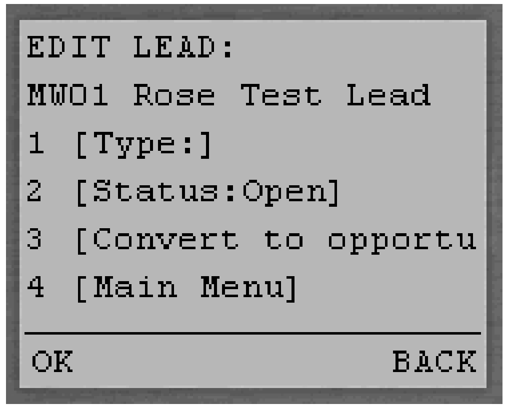
Users manage lead information using the Lead List screen, the Lead Detail screen, and the Edit Lead screen.



Lead List screen



Lead Detail screen



Edit Lead screen

To view leads:

1. Select Leads from the PeopleSoft CRM screen.

   By default the list of leads that appear for each user will be: Leads as Manager, Leads as Owner, Leads as Task Assignee, New Leads as Owner, Team Member Leads, and Team Member Manager Leads. The leads are additionally filtered based on the status field. Only leads with status of Accepted, Deferred, Imported, New, Open, Referred or Working will be displayed in the list. If you would like to modify the search filter for the Lead list transaction, you can use the configurable search tool in the HTML version of the Lead List transaction. To do this, sign-in to the CRM application using the HTML browser and access the Sales->Leads->Lead List transaction. Once you are in Lead List, configure the search the way that you would like it to behave in the WAP client then save the search using the name "WAP." The next time that you access the Lead option from the WAP Sales main menu, this new saved search filter will be used to retrieve the Lead List.

   When you select a lead from the list, the Lead Detail screen appears.

   Note. If there is only one lead, you need not select from a list because the Lead Detail screen automatically appears.

2. Access any related information.

   The Lead Detail screen links to the associated Contacts and company. If there are any tasks associated with the lead, a task link appears. If a lead has been converted to an opportunity, then it displays a link to the opportunity.

   From the Lead Detail screen, you can view lead details such as Status, Type, and Rating.

To modify lead information or convert a lead to an opportunity:

1. Access the Lead Detail screen as described in the previous steps.
2. Scroll down (or up) so that the black cursor arrow disappears entirely from the screen, and click the EDIT button.

   The LINK button changes to an EDIT button; you are now in edit mode. The Edit Lead screen appears:

Type	Allows you to edit the lead type.
Status	Allows you to change the status of the lead.
Convert to opportunity	Converts this lead to an opportunity.
Main Menu	Return to PeopleSoft CRM screen

See Also

Chapter 6, "Using PeopleSoft Enterprise Mobile Sales," Using Leads and Opportunities in Mobile Sales, page 53

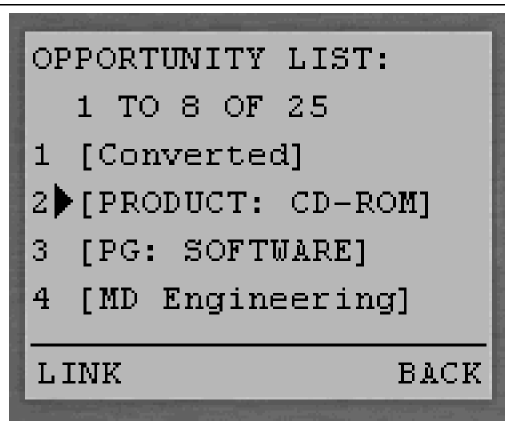
Viewing or Modifying Opportunities

You can view or modify sales opportunities by accessing the Opportunities link from the PeopleSoft CRM screen.

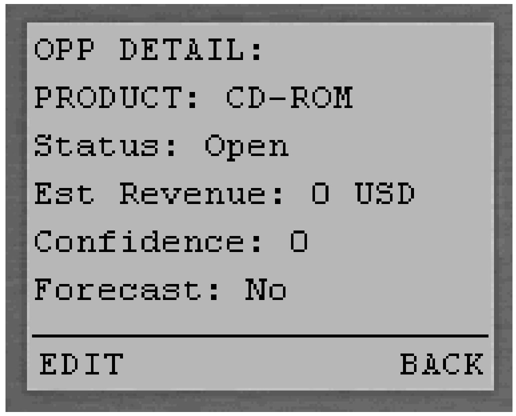
By default the list of opportunities that appear for each user will be: Opportunities as Manager, Opportunities as Owner, Opportunities as Task Assignee, New Opportunities as Owner, Team Member Opportunities, and Team Member Manager Opportunities. The opportunities are additionally filtered based on the status field. Only opportunities with status of Open will be displayed in the list. Opportunities with a status of Closed Lost, Closed Won or Inactive will be filtered out. If you would like to modify a search filter for the Opportunity list transaction you can use the configurable search tool in the HTML version of the Opportunity List transaction. To do this, sign-in to the CRM application using a HTML browser and access the Sales->Opportunities->Opportunities List transaction. Once you are in there, configure the search the way that you would like it to behave in the WAP client then save the search using the name "WAP." The next time that you access the Opportunities option from the WAP Sales main menu, this new saved search filter will be used to retrieve the Opportunity List.

Note. Opportunities has an anchor to any associated Contacts and company. If there are any tasks associated with the opportunity, a task link appears. If the opportunity is converted from a lead, the opportunity has a link to the lead.

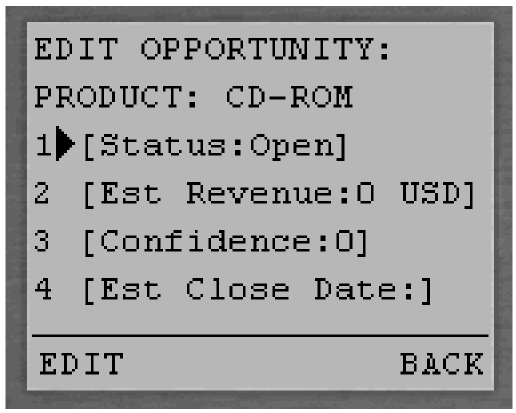
Users manage opportunity information using the Opportunity List screen, the Opportunity Detail screen, and the Edit Opportunity screen.



Opportunity List screen



Opportunity Detail screen



Edit Opportunity screen

To view or modify sales opportunities:

1. Select Opportunities from the PeopleSoft CRM screen.

   The Opportunity List screen appears.

   Note. If there is only one opportunity, you need not select from a list because the Opportunity Detail screen automatically appears.

   ---

2. Select an opportunity to view or modify details.

To modify an opportunity:

1. Access the Opportunity Detail screen as described in the previous steps.
2. Scroll down (or up) so that the black cursor arrow disappears entirely from the screen, and click the EDIT button.

   The LINK button changes to an EDIT button; you are now in edit mode. The Edit Opportunity screen appears:

Status	Shows whether the opportunity is *Open, Closed, Closed-Won,* or *Closed-Lost*. If you change the status to *Closed-Won* you will be prompted to enter the actual close date and the actual revenue. If you change the status to *Closed-Lost* , you will be prompted for the actual close date and you will be asked to select a fallout reason from a list.

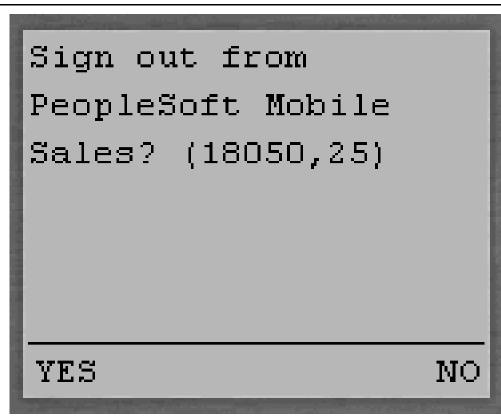
Est Revenue (Estimated Revenue)	Estimated revenue for the opportunity.
Confidence	Confidence from 0% to 100%.
Est Close Date (Estimated Close Date)	Estimated closing date.
Forecast	Include in Forecast? Values are: *Yes* or *No.*
Forecast Type	Forecast type that indicates the degree of likelihood in closing the deal. Values include: *Committed* or *Stretch.*
Main Menu	Return to PeopleSoft CRM screen.

See Also

Chapter 6, "Using PeopleSoft Enterprise Mobile Sales," Using Leads and Opportunities in Mobile Sales, page 53

Signing Out

Click the Sign Out link on the PeopleSoft CRM screen to access the Sign Out screen, where you are prompted to confirm whether you want to sign out. Click Yes to sign out; click No to remain connected.



Sign Out screen

APPENDIX A

ISO Country and Currency Codes

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

This appendix discusses:

- ISO country codes.
- ISO currency codes.

See Also

"About This PeopleBook," Typographical Conventions and Visual Cues

ISO Country Codes

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

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

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

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

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

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

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

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

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

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

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

ISO Currency Codes

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

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

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

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

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

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

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

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

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

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

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

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

Glossary of PeopleSoft Terms

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

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

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

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

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

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

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

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

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

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

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

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

agreement In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

AR specialist Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

asset class An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

authentication server A server that is set up to verify users of the system.

base time period In PeopleSoft Business Planning, the lowest level time period in a calendar.

benchmark job In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

book In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

branch A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called “system-maintained account.”

budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business event In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

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

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

catalog item In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.

catalog partner In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

collection To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

condition In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

cost profile A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

cost row A cost transaction and amount for a set of ChartFields.

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

data acquisition In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data elements Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

See also *compensation object.*

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

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

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

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

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

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

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

See *record input VAT flag.*

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

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

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

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

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

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

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

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

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

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

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

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

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

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

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

template A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

TimeSpan A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

work order — In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worksheet — A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

worklist — The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML schema — An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

yield by operation — In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT — Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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