



PeopleSoft Enterprise CRM 8.9 Process Integration Packs PeopleBook

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PeopleSoft Enterprise CRM 8.9 Process Integration Packs 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>

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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.

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See Also

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

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

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

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

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

Once, Always, and Don't Run

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

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

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

Report Manager

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

Process Monitor

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

Run

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

Request ID

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

User ID

An ID that represents the person who generates a transaction.

SetID

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

Short Description

Enter up to 15 characters of text.

PeopleSoft CRM Process Integration Packs Preface

This preface discusses:

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

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

PeopleSoft Application Fundamentals

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

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

- CRM Multi-Product Foundation.

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

- Workforce Management.

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

- Interactions and 360-Degree Views.

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

- Self-Service for Customers.

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

- Relationship Management.

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

- Entitlement Management.

This part discusses setting up agreements and warranties.

- SmartViews.

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

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook

PeopleSoft CRM Automation and Configuration Tools

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

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

- Correspondence management.

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

- Automation tools.

This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (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.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook

PeopleTools PeopleBooks

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

CHAPTER 1

Getting Started with CRM Process Integration Packs

This chapter provides an overview of CRM Process Integration Packs and discusses:

- Supported business processes.
- Implementation tasks.

CRM Process Integration Packs Overview

The CRM Process Integration Packs integrate business processes and data between PeopleSoft CRM 8.9 and Oracle applications 11.5.5 or PeopleSoft CRM 8.9 and SAP 4.6C. PeopleSoft Integration Broker enables the communication between these applications.

CRM Process Integration Packs include inbound and outbound gateways for each supported application: PeopleSoft CRM, Oracle, and SAP. When business objects are created or modified, the outbound gateway converts messages from the sending applications native Extensible Markup Language (XML) format to a standard XML format, Open Application Group Integration Specification (OAGIS) 8.0, and publishes the messages to the transport protocol. Similarly, the inbound gateway converts the messages back from the standard format to the receiving applications native format before the messages are accepted by the gateway.

Supported Business Processes

CRM Process Integration Packs support these business processes:

- Order management.

Supports the generation and management of sales orders, including processes for checking part availability, tracking shipments, and maintaining inventory levels.

- Service fulfillment.

Supports the generation and management of service orders, including processes for creating service part requisitions, tracking service costs, and generating invoices.

- Service return materials authorization (RMA).

Supports the generation and management of RMAs, including processes for creating support cases, handling customer returns, and maintaining service agreements.

CRM Process Integration Packs ensure bi-directional realtime information exchange between the supported applications.

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

CRM Process Integration Packs Implementation

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

In the planning phase of the implementation, take advantage of all sources of information, including installation guides and other documentation for PeopleSoft CRM, Oracle, and SAP applications. A complete list of these resources appears in the preface.

Other Sources of Information

In the planning phase of your 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 in the *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook* and *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook* with information on where to find the most up-to-date version of each.

See Also

PeopleSoft Enterprise Setup Manager for Customer Relationship Management 8.9 PeopleBook

CHAPTER 2

Understanding CRM Process Integration Packs Architecture

This chapter discusses:

- Overall CRM Process Integration Packs architecture.
- PeopleSoft outbound architecture.
- PeopleSoft inbound architecture.

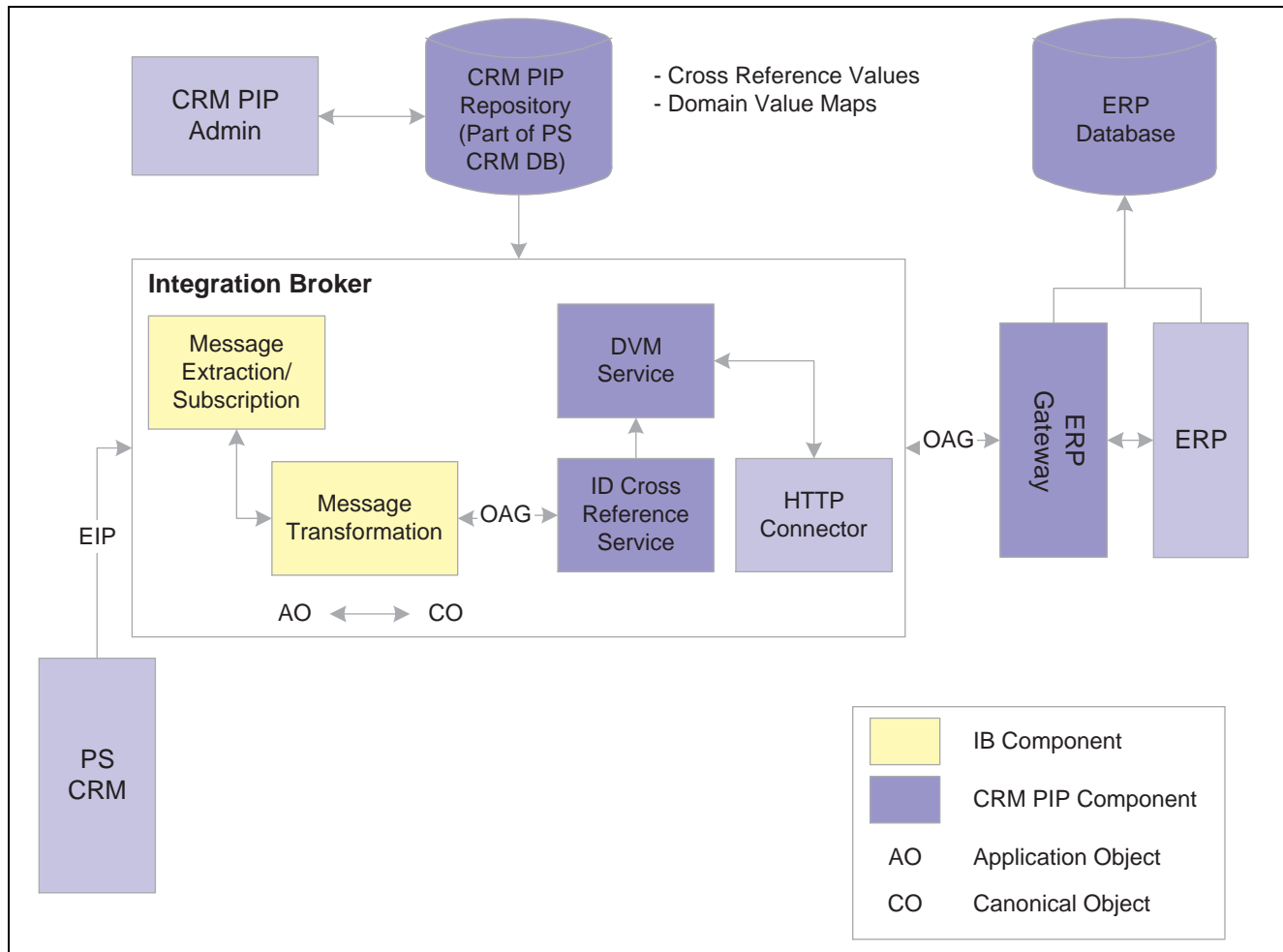
Overall CRM Process Integration Packs Architecture

CRM Process Integration Packs include gateways for each supported application: PeopleSoft CRM, Oracle, and SAP.

Each application gateway consists of an inbound module and an outbound module. The outbound gateway moves changed business objects from PeopleSoft CRM to Oracle or SAP. The inbound gateway moves changed business objects from Oracle or SAP to PeopleSoft CRM.

When business objects are changed, a message is generated. The outbound gateway processes the message in the applications native Extensible Markup Language (XML) format and converts the message to the Open Application Group (OAG) XML format before publishing. Similarly, the inbound messages in OAG XML are converted to native XML before being accepted by the gateway. When a message is published, the integration server checks for echo. After echo suppression, a confirmation business object document is generated.

OAGIS 8.0 is the standard format for this integration.



CRM Process Integration Packs High Level Architecture

PeopleSoft Outbound Architecture

The following steps occur when information is sent from PeopleSoft CRM to Oracle or SAP applications:

1. Data from PeopleSoft CRM is extracted using either PeopleCode or an Application Engine running within the context of PeopleSoft Integration Broker.

PeopleSoft native XML (also called an enterprise integration point [EIP]) is transformed into OAG format using Extensible Stylesheet Language (XSL) transformations available within the PeopleSoft Integration Broker integration engine.

2. The OAG document is automatically routed and sent to the active node.
3. The ID cross-reference service processes the OAG document.
4. The domain value mapping receives the OAG document and searches the repository to find the list of values to transform.

This step is necessary because values can have different meanings in different applications.

5. PeopleSoft Integration Broker posts the OAG document to the appropriate applications, using HTTP as the mode of transport.

6. The application connector running in the target application receives the OAG document and converts it into the native application data format using XSL transformations.

The XSL transformation converts the OAG document into a set of SQL statements, which are run against the target applications database. This step inserts data into the interface tables. The concurrent manager (if the target application is Oracle) or the SAP Connector program (if the target application is SAP) is invoked to process the data.

See Also

Chapter 3, “Setting Up the CRM Process Integration Packs Admin Utility,” Managing Initial ID Cross-References , page 14

Chapter 3, “Setting Up the CRM Process Integration Packs Admin Utility,” Setting Up Domain Value Maps , page 10

PeopleSoft Inbound Architecture

The following steps occur when information is sent from Oracle or SAP applications to PeopleSoft CRM:

1. Any newly created business object within Oracle or SAP initiates a set of database triggers, which insert a new record into the Notification table.

A database poller (part of the application connector) picks up this record. This data is given to the event extractor, which runs a SQL procedure against the Oracle applications database to extract the native XML.

Any newly created business object within SAP R/3 is posted to the Application Linking Enabling (ALE) layer, which is picked up by the application connector. This listener program converts the incoming intermediate document into XML format.

2. The native XML is converted to OAG format by XSL transformation.
3. The OAG document is posted to PeopleSoft using HTTP as the transport medium.
4. The integration gateway receives the OAG document and forwards it to the integration engine.
5. The OAG document is automatically routed and sent to the active node.
6. The ID cross-reference service processes the OAG document in the same way as outbound transactions.
7. The domain value map receives the OAG document and searches the repository for the values to transform. This step is necessary because values may have different meanings in different applications.
8. PeopleSoft Integration Broker posts the OAG document to the appropriate applications, using HTTP as the mode of transport.

CHAPTER 3

Setting Up the CRM Process Integration Packs Admin Utility

This chapter provides an overview of the CRM Process Integration Packs Admin utility and discusses how to:

- Sign in to CRM Process Integration Packs.
- Configure CRM Process Integration Packs Admin.
- Diagnose object document and cross-reference values.
- Set up domain value maps.
- Configure initial ID cross-references.
- Manage initial ID cross-reference services.

Understanding CRM Process Integration Packs Admin

The CRM Process Integration Packs Admin (CRM PIP Admin) utility is used to configure parameters such as domain value maps and ID cross-references. It creates the cross-reference keys for storing such references. The cross-reference information is maintained in the database.

The ID cross-reference service generates and maintains a common reference ID for a business object in relation to all participating applications.

The domain value mapping service receives the Open Application Group (OAG) document and searches the CRM Process Integration Packs repository to obtain the list of values to transform within the OAG document. This is required when the two applications use different values to represent the same information for a given field.

Signing In to CRM Process Integration Packs

To sign into CRM Process Integration Packs, use the CRM Process Integration Packs username and password assigned to you on the PeopleSoft sign-in page.

You access CRM Process Integration Packs modules just like you access PeopleSoft CRM applications and business processes.

Configuring the CRM Process Integration Packs Admin

You use the CRM PIP Admin utility to configure parameters such as domain value maps and initial ID cross-references. To manage the portal structure and content, you need portal administration rights for folder management and content reference management.

See Also

PeopleTools 8.45 PeopleBook: PeopleTools Internet Technology, Administering Portals

Diagnosing Canonical Object Document and Object Cross-Reference Values

Canonical Object Document data maintains the original and external reference paths in the XML for the business objects. When the object value is propagated from source to target, before Extensible Stylesheet Language (XSL) transformation to target native XML format, the system checks for the reference path and retrieves the field value to be incorporated in the target.

The object cross-reference option enables you to modify the cross-references generated for the business objects by the ID cross-reference service.

Note. Using the PIP Diagnosis options, records can only be updated and not deleted.

Pages Used to Diagnose Object Document and Cross-Reference Values

Page Name	Object Name	Navigation	Usage
Canonical Object Document Key Values	DOCKEYDISP	Set Up CRM, Common Definitions, Integration Rules, CRM PIP Admin, PIP Diagnosis, Canonical Object Document	View the canonical object document key values.
Cross-Reference Values	DISPCOMP	Set Up CRM, Common Definitions, Integration Rules, CRM PIP Admin, PIP Diagnosis, Object Cross-Reference	View the cross-reference values inserted for the business objects for each participating application.

Viewing the Cross-Reference Values

Access the Cross Reference Values page.

Cross Reference Values

Cross Reference Id:	<input style="width: 90%;" type="text" value="1"/>
Cross Reference Key:	<input style="width: 90%;" type="text" value="1"/>
Application Instance Id:	<input style="width: 90%;" type="text" value="GWSAP1"/>
Master Object:	<input style="width: 90%;" type="text" value="ItemMaster"/>
Master Object Id:	<input style="width: 90%;" type="text" value="MATMAS2"/>
Sub Object:	<input style="width: 90%;" type="text" value="ItemMaster"/>
Sub Object Id:	<input style="width: 90%;" type="text" value="MATMAS2"/>

Modify

This object is maintained by PeopleSoft. (17831,8511)

Last Update Date/Time:
Last Update User ID:

Cross Reference Values page

The field values displayed are:

Cross Reference ID	The ID for the cross-reference value generated. This value is incremented for each master and sub object in each participating application.
Cross Reference Key	<p>The cross-reference key value, which is the same for a master object in all participating applications.</p> <p>The cross-reference key value for the sales order master object will be the same in all participating applications.</p>
Application Instance ID	<p>The instance of the participating application for which the cross-reference key was generated.</p> <p>A separate row is added in the cross-reference tables for each participating application.</p>
Master Object	The master object for which the cross-reference key was generated. For example, it could be sales orders, item master, party, and so on.
Master Object ID	The corresponding reference value for the master object in each application.
Sub Object	The sub object for which the cross-reference key was generated. For example, it could be sales order line, item, address, and so on.
Sub Object ID	The reference value for the sub object corresponding to the master object in each application.
Modify	Click to modify the generated cross-reference values.

Note. The cross reference ID and cross reference key values cannot be modified.

Setting Up Domain Value Maps

This section provides an overview of domain value maps and lists pages used to set up domain value maps.

Understanding Domain Value Maps

During integration, you transform field values from the source application according to the requirements of the target application. The domain value mapping service receives an OAG document and searches the CRM Process Integration Packs repository to obtain a list of values to transform.

You apply domain value maps to a message before it reaches the target application. Domain value maps are stored in the Domain Value Mapping table (ANET_IS_DVM) in the database.

For example, the country field attribute value in the source application might be *USA* and in the target application, the attribute value might be *US*.

Pages Used to Set Up Domain Value Maps

Page Name	Object Name	Navigation	Usage
Domain Value Maps	ANET_DVM_COMP	Set Up CRM, Common Definitions, Integration Rules, CRM PIP Admin, Domain Value Maps, Domain Value Maps	Add domain value maps.

Adding Domain Value Maps

Access the Domain Value Maps page.

Domain Value Mapping		
Domain Value Id	94	
Touch Point	RTR02	RTR02-Sales Order of type RMA
Business Object	SalesOrder	
Attribute	//SyncSalesOrder/DataArea/SalesOrder/Header/UserArea/OrderReason	
Dummy Name		
Source Application:	PeopleSoft	PeopleSoft
Source Instance:	GWPSFT1	PSFT
Source Value:	00	
Dummy Name		
Target Application:	SAP	SAP
Target Instance:	GW SAP1	SAP
Target Value:	106	
<input type="button" value="Modify"/> <input checked="" type="checkbox"/>		
This object is maintained by PeopleSoft.		
Last Update Date/Time:		Last Update User ID:

Domain Value Maps

The field values displayed are:

Touch Point ID	The touch point ID for which the domain value mapping is applicable.
Attribute	The XML path where the source application field value is replaced by the target application field value.
Source Application	The source application whose business object field value is to be replaced.
Source Instance	The source application instance.
Source Value	The value for the business object in the source application. For example, the alternative unit of measure value could be B15 in PeopleSoft and BG in SAP.
Target Application	The target application whose corresponding business object field value is replaced.
Target Instance	The target application instance.

Target Value	The value for the business object in the target application.
Enabled	Select this check box to enable the domain value map.

Configuring Initial ID Cross-References

This section provides an overview of initial ID cross-references and lists pages used to configure initial ID cross-references.

Understanding Initial ID Cross-References

Use these pages to enter values for instance and organization. These values are required to configure the ID cross-reference service and generate cross-reference keys for business objects.

The update customer and item data options are used to receive corresponding table fields from Oracle or SAP as a flat file to PeopleSoft CRM during initial synchronization.

Pages Used to Configure Initial ID Cross-References

Page Name	Object Name	Navigation	Usage
Configure Application Instance	CONFIG_INSTANCE	Set Up CRM, Common Definitions, Integration Rules, CRM PIP Admin, Configure Initial ID Cross-Reference, Instance	Add an application instance.
Configure Organization	CONFIG_ORG	Set Up CRM, Common Definitions, Integration Rules, CRM PIP Admin, Configure Initial ID Cross-Reference, Organization	Add an organization.
Upload Customer Data	CUSTOMERUPLOAD	Set Up CRM, Common Definitions, Integration Rules, CRM PIP Admin, Configure Initial ID Cross-Reference, Upload Customer Data	Update customer data.
Upload Item Data	ITEMUPLOAD	Set Up CRM, Common Definitions, Integration Rules, CRM PIP Admin, Configure Initial ID Cross-Reference, Upload Item Data	Update item data.

Uploading Customer Data

Access the Upload Customer Data page.

A screenshot of a web application window titled "Upload Customer Data". The window contains three input fields. The first field is labeled "*Application:" and contains the text "ORACLE", with a magnifying glass icon to its right. The second field is labeled "*Instance:" and contains the text "GWOA1", also with a magnifying glass icon to its right. The third field is labeled "*File Name:" and contains the text "C:\temp\customer.txt".

Upload Customer Data

*Application: ORACLE

*Instance: GWOA1

*File Name: C:\temp\customer.txt

Upload Customer Data page

To upload customer data:

1. Select Add a New Value.
2. Enter the run control ID.
3. Select the application from which the customer data is uploaded.
4. Select the application instance from which data is uploaded.
5. Enter the name and path of the file that will contain the customer data.
6. Click Save.

Uploading Item Data

Access the Upload Item Data page.

A screenshot of a web application window titled "Upload Item Data". The window contains three input fields. The first field is labeled "*Application:" and contains the text "PEOPLESOFT", with a magnifying glass icon to its right. The second field is labeled "*Instance:" and contains the text "GWPSFT1", also with a magnifying glass icon to its right. The third field is labeled "*File Name:" and contains the text "C:\temp\item.txt".

Upload Item Data

*Application: PEOPLESOFT

*Instance: GWPSFT1

*File Name: C:\temp\item.txt

Upload Item Data

To upload item data:

1. Select Add a New Value.
2. Enter the run control ID.
3. Select the application from which the item data is uploaded to PeopleSoft CRM.
4. Select the application instance from which data is uploaded.
5. Enter the name of the file that will contain the item data.
6. Click Save.

Managing Initial ID Cross-References

This section provides an overview of initial ID cross-reference services and lists pages used to manage initial ID cross-reference services.

Understanding Initial ID Cross-Reference Services

The object ID cross-reference service stores the reference of the same business object in each participating application. It creates cross-reference keys for storing such references. The cross-reference information is maintained in the database.

The ID cross-reference service searches the repository to find the list of keys to map for the OAG document. New records are inserted for primary keys at each level in the OAG document.

Multiple cross-references might be required for a single OAG document. For example, a customer object might contain address information along with customer information. In this case, two records are inserted for each of the participating applications, one for the customer ID and one for the address ID.

For updates, the cross-reference key and the subobject key in the target application are retrieved and substituted in the external reference and original reference tags.

The list of the attributes that require cross-referencing is prepopulated in the CRM Process Integration Packs repository through SQL scripts. Using these values, the ID cross-reference service identifies the attributes in the business object document and generates the cross-reference keys.

Assumptions and Dependencies for Customer Cross-References

When referencing customer business objects, the following assumptions are made:

- Data is available at the PeopleSoft database level.
- The PeopleSoft setID is mapped to the SAP sales area or the Oracle organization code.
- The PeopleSoft customer name is equal to the SAP customer name or the Oracle customer name.
- Customers are propagated to SAP or Oracle from PeopleSoft separately (that is, PeopleSoft to SAP or PeopleSoft to Oracle).

Assumptions and Dependencies for Item Cross-References

When referencing item business objects, the following assumptions are made:

- Data is available at the PeopleSoft database level.
- The PeopleSoft setID is mapped to the SAP sales area or Oracle organization code.
- The PeopleSoft inventory item ID is equal to the SAP material number or Oracle Segment1.
- Items are propagated to PeopleSoft from SAP or Oracle separately (that is, SAP to PeopleSoft or Oracle to PeopleSoft).

Batch Processing

When you generate cross-reference keys using the batch process, the process can be scheduled to use the system resources effectively. After completion, a report in a specified format is generated for diagnostic purposes. Unsuccessful processes can be resumed through the online process, or another batch process can be initiated. This process is effective for large volumes of data.

Single Item Processing

This process generates cross-reference keys instantly. Use this process for small volumes of data.

Pages Used to Manage Initial ID Cross-References

Page Name	Object Name	Navigation	Usage
Customer ID Cross Reference	CUSTIDCR	Set Up CRM, Common Definitions, Integration Rules, CRM PIP Admin, Initial ID Cross-Reference, Customer Master (Batch)	Set the batch process run for customer data.
ID Cross-Reference	ITEMIDCR	Set Up CRM, Common Definitions, Integration Rules, CRM PIP Admin, Initial ID Cross-Reference, Item Master (Batch)	Set the batch process run for item data.
IDCR	CUST	Set Up CRM, Common Definitions, Integration Rules, CRM PIP Admin, Initial ID Cross-Reference, Customer Master (Online)	Run the process individually for customer objects.
IDCR	CRRCOMP	Set Up CRM, Common Definitions, Integration Rules, CRM PIP Admin, Initial ID Cross-Reference, Item Master (Online)	Run the process individually for item objects.

Setting the Customer Master Batch Process

Access the Customer ID Cross Reference page.

Customer ID Cross Reference page

To set the customer master batch process:

1. Select Add a New Value.
2. Enter the process run control ID.
3. Select the source and target applications whose cross-reference keys are to be mapped.

4. Select the application instances.
5. Select the source and target organizations whose cross-references are to be mapped.
6. Click Save.

Note. Follow the same procedure for the setting the item master batch process.

Setting the Item Master Online Process

Access the ID Cross Reference page.

The screenshot shows the 'ID Cross Reference' page with two tabs: 'ID Cross Reference' (active) and 'Automap'. The page is divided into 'Source' and 'Target' sections. In the 'Source' section, there are input fields for '*Instance:' (GWPST1) and '*Organization:' (V1), each with a search icon. Below these are two data grids. The first grid has columns 'Item ID' and 'Description' and is currently empty. The second grid is also empty. In the 'Target' section, there are input fields for '*Instance:' (GWSAP1) and '*Organization:' (ACUS), each with a search icon. Below these is a 'Refresh' button and another empty data grid with columns 'Item ID' and 'Description'. At the bottom of the page are two buttons: 'Auto Map' and 'Map'.

ID Cross Reference page

To set the item master online process:

1. Select the source and target applications whose cross-reference keys are to be mapped.
2. Select the application instances.
3. Select the source and target organizations whose cross-reference keys are to be mapped.
4. Click the Refresh button to display the values in the source and target. Select the rows in the source and target to be mapped.

When you use the Automap option, you need not refresh and select the source and target rows.

5. Click the Map button to generate the cross-reference key explicitly.
6. If you click the Auto Map button, the list of data that can be mapped is displayed. Select the required rows and click IDCR.

Important! If you click the Map button, the system does not check if the item name in the source is equivalent to the item name in the target.

However, if you click the Auto Map button, the cross-reference key is generated only after checking that the source item name is equivalent to the target item name. If no two rows are equivalent, in the Automap tab page no row is displayed in the Mapped data grid.

Follow the same procedure for the customer master online process.

CHAPTER 4

Integrating Master Business Objects

This chapter lists prerequisites and discusses how to:

- Integrate items.
- Integrate customers.
- Integrate price lists.

Important! Start all gateways as explained in the *CRM Process Integration Pack Installation Guide*.

Prerequisites

Before you integrate master business objects, you need to:

- Map PeopleSoft CRM setIDs to sales areas in SAP and item operating units and master organizations in Oracle.
- Map unit of measure values between Oracle or SAP and PeopleSoft CRM.
- Map required storage locations in SAP and subinventories in Oracle applications as inventory locations in PeopleSoft CRM.

Integrating Items

This section provides an overview of item integration, lists prerequisites, and discusses how to:

- Create items in Oracle applications.
- Create items in SAP.
- Check for items in PeopleSoft CRM.
- Check for products in PeopleSoft CRM.

Understanding Item Integration

Items are created in Oracle or SAP and propagated to PeopleSoft CRM, which creates new items as well as corresponding products. This process goes one way only: from Oracle or SAP to PeopleSoft. This integration supports the following scenarios:

- Item created in Oracle or SAP is propagated to PeopleSoft CRM.
- Item updated in Oracle or SAP is propagated to PeopleSoft CRM.

Saving the item definition in Oracle or SAP automatically initiates the process to propagate items to PeopleSoft CRM.

Because items in PeopleSoft CRM can be attached to multiple products, only create items in Oracle or SAP. New products created in PeopleSoft CRM will not have a corresponding cross-reference key.

Item Full Sync is not supported. Configured items (configurators and packages) are not supported.

Item substitutions are not integrated from Oracle or SAP to PeopleSoft CRM.

Prerequisites

Before you can integrate items, you need to:

- Define values in Oracle for:
 - Item status.
 - Serial number control.
- Define values in SAP for:
 - Material types.
 - Serial number profiles (for serialized materials).
 - If the serial number profile is attached to a material, a serialized flag is marked in PeopleSoft.
- Define values in PeopleSoft CRM for:
 - Item number and product ID control values (autonumbering).
 - Item groups and product groups.
 - Item status.
 - Stock types.
 - Installed product default status settings.

Pages Used to Integrate Items

Page Name	Object Name	Navigation	Usage
Master Items	Oracle Applications	Inventory, Items, Master Items	Add new items.
Organization Item	Oracle Applications	Inventory, Items, Organization Items	Update item attributes.
Create Material	SAP	Logistics, Material Management, Material Master, Material, Create, Immediately Enter the transaction code <i>MM01</i> in the command field.	Add new items.
Change Material	SAP	Logistics, Material Management, Material Master, Material, Change, Immediately Enter the transaction code <i>MM02</i> in the command field.	Modify item details.
Item Definition	PeopleSoft CRM	Items CRM, Review Item Definition	Search for items.
Product Definition	PeopleSoft CRM	Products CRM, Product Definition	Search for products.

Creating Items in Oracle Applications

Access the Master Items screen.

To create items:

1. Select an item master organization.
2. For integrating items, specify details for:
 - Item ID.
Keep item IDs to 18 characters or less. Although item IDs in Oracle can be up to 30 characters long, PeopleSoft item IDs can only be 18 characters. If an item ID created in Oracle has more than 18 characters, the corresponding PeopleSoft item ID will contain only the first 18 characters of the Oracle ID.
 - Short and long description.
 - Unit of measure.
 - Current status.
 - Inventory organization to which the item is assigned.
 - Item group and category definition.
 - Item type. For example, indicate if the item is finished goods or a serviceable item.
3. Assign the item to organizations.
4. Save the record.

See Also

Oracle applications 11.5.5 documentation

Creating Items in SAP

Access the Create Material Screen.

To create items:

1. Enter the material name.
2. Select the industry sector to which the material belongs.
3. Select the material type.
4. Click Enter
5. Click *Organization levels*.
6. Select the plant, sales organization, and distribution channel, and click Enter.
7. On the screen that appears, specify details for:
 - Unit of measure.
 - Material group.
 - General item category group.
8. Enter all other mandatory data and save the record.
9. To trigger the material creation, enter the transaction code *BD21* in the command field.
10. Select the message type as *MATMAS*.

An outbound intermediate document for that material is created.

See Also

SAP R/3 release 4.6C documentation

Checking for Items in PeopleSoft CRM

Access the Item Definition page.

Check if the information that you transferred from Oracle or SAP is reflected in PeopleSoft CRM.

See Also

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

Checking for Products in PeopleSoft CRM

Access the Product Definition page.

Check if the information that you transferred from Oracle or SAP is reflected in PeopleSoft CRM.

See Also

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook, “Setting Up Product Definitional Elements”

Integrating Customers

This section provides an overview of customer integration, lists prerequisites, and discusses how to:

- Create customers in PeopleSoft CRM.
- Update customers in PeopleSoft CRM.
- Check for customers in Oracle applications.

Understanding Customer Integration

You can integrate customer and contacts data between PeopleSoft CRM and Oracle or SAP. This integration supports the following scenarios:

- The customers and contacts created in PeopleSoft CRM are propagated to Oracle or SAP.
- The customers and contacts updated in PeopleSoft CRM are propagated to Oracle or SAP.
- Customers and contacts updated in Oracle or SAP are propagated to PeopleSoft CRM.

Although PeopleSoft CRM supports multiple bill-to and ship-to addresses, multiple bill-to and ship-to addresses are not supported in the integration with SAP. Use a single bill-to and ship-to address only. The primary address specified is used by the system.

Consumer and Site Sync not supported. Contacts are not populated from SAP to PeopleSoft CRM.

Currently, one-time ship-to and bill-to address and contacts are not handled.

Save the customers in PeopleSoft CRM to automatically integrate to Oracle or SAP.

Important! A customer or contact record is only ready to be transferred after entering key data elements (such as bill-to and ship-to addresses, contact details, and correct status).

Prerequisites

Before you can integrate customers, you need to:

- Define values in Oracle for:
 - Customer and site numbering.
 - Operating units.
 - Profile classes.
- Define values in SAP for:
 - Organization unit settings.
 - Customer account group settings.
- Define values in PeopleSoft CRM for:
 - Customers and contact autonumbering.
 - Customer types.
 - Location types.
 - Country and address formats.
 - State codes.

- Site types.
- Time zones.
- Business object roles.
- Industry types.
- Payment terms and payment methods.
- Name type defaults.
- User roles.

Pages Used to Integrate Customers

Page Name	Object Name	Navigation	Usage
Company	PeopleSoft CRM	Customers CRM, Company, Add Company	Add new customers.
Update Customer	PeopleSoft CRM	Customers CRM, Company, Company Search	Update customer details.
Find / Enter Customers	Oracle Applications	Receivables, Customers, Standard	Search for customers.
Display Customer	SAP	Enter the transaction code <i>XD03</i> in the command field.	Search for customers.
Update Customer	SAP	Enter the transaction code <i>XD02</i> in the command field.	Update customer details

Creating Customers in PeopleSoft CRM

Access the Company page.

Company

[Save](#)
[360-Degree View](#)
[Search](#)
[Add Company](#)
[Add to My Contacts](#)
[Personalize](#)

Customer DELL1

Location

Contact

Job Title

Phone

Email

[Summary](#)
[Account Team](#)
[Tasks](#)
[Call Reports](#)
[Plans](#)
[Notes](#)
[Address Book](#)

[Summary](#)
[Details](#)
[Purchasing Info](#)

Company Details

* Company

DELL1

Country

United States

Incorporated In

DUNS Number

Ownership

Legal Structure

Customer Type

Business

Website URL

(example: http://www.peoplesoft.com)

Minority Owned

Partner

No

More Names

Taxpayer ID

Location Type

Employee Total

Parent Company

Year Started

Year Incorporated

* SetID

CRM01

* Company ID

NEXT

Privacy

Do Not Contact

Do Not Email

Do Not Call

Do Not Mail

Contact Info Entries

*Description

Business

More...

Phone

*Type	Country Code	Number	Ext/PIN
Main			
Cellular			
FAX			
Pager			

Email

*Type

Email Address

Business

Other

Address

Look up Address

*Type

Business

*Country

United States

Address 1

6544 San Tomas Blvd

Address 2

Address 3

City

San Jose

County

State

CA

California

Postal

95744

Set Display

Status and Currency Data

*Customer Status

Active

Status Date

05/20/2004

Customer Since

05/20/2004

Segment Code

*Currency Code

USD

*Currency Type

CRRNT

Credit Rating Value

Assessment

Financial Details

Industry Classifications

Purchasing Options

Sold To Customer

This company can make purchases.

Bill To Customer

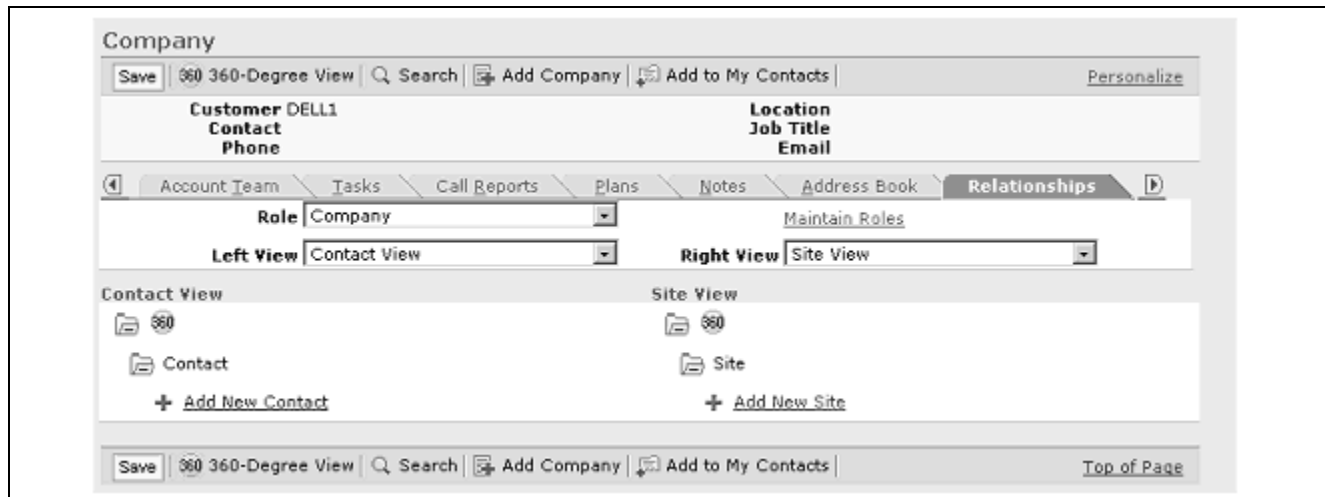
This company can receive bills.

Ship To Customer

This company can receive shipments.

[Save](#)
[360-Degree View](#)
[Search](#)
[Add Company](#)
[Add to My Contacts](#)
[Top of Page](#)

Company page



Company - Relationships page

To create customers:

1. Specify the details for:
 - Company name, name type, purchasing options, currency code, and currency type.
 - Ship-to, bill-to, and sold-to addresses and start and end date.
 - Phone number and effective dates.
 - Contact name type, first name, last name, and purchasing options.
 - Company site, site contacts, and relationships.
2. Save the record.

Important! The county and postal codes are mandatory for integrating customers to Oracle, and the postal code should be valid for the county.

Checking for Customers in Oracle Applications

Access the Customer Addresses screen.

Check the customer details on this screen.

Important! For all customers propagated from PeopleSoft CRM, the sold-to, bill-to, and ship-to check boxes should be selected at the header level.

See Also

Oracle applications 11.5.5 documentation

Checking for Customers in SAP

Access the Customer Display screen.

The customer general details are displayed.

See Also

SAP R/3 release 4.6C documentation

Integrating Price Lists

This section provides an overview of price list integration, lists prerequisites, and discusses how to:

- Create price lists in Oracle applications.
- Create price lists in SAP.
- Check for price lists in PeopleSoft CRM.

Understanding Price List Integration

The list price is the base price used for the item. Master price lists are created in Oracle or SAP for pricing a product or service. Price list integration is one way from Oracle or SAP to PeopleSoft CRM. The integration supports these scenarios:

- Price list created in Oracle or SAP is propagated to PeopleSoft CRM.
- Price list updated in Oracle or SAP is propagated to PeopleSoft CRM.

Saving the price lists in Oracle or SAP to automatically creates a message in PeopleSoft CRM.

Price lists can be created in SAP using one of these options:

- Material price list: Create price list for materials.
- Price list: Create price list for a group of customers, based on price list type and currency.
- Individual price list: Create price list for a specific customer.

Prerequisites

Before integrating price lists, you need to:

- Map business units in PeopleSoft CRM to operating units in Oracle.
- Define values in SAP for:
 - Condition types.
 - Price list types.
 - Sales organizations.
 - Distribution channels.
 - Divisions.
- Define values in PeopleSoft CRM for:
 - Pricing key fields.
 - Pricing rule sequences.
 - Price rules.
 - Price sets.

- Exclusive pricing.
- Price lists.
- Services.
- Service activities.
- Purchase options.
- Transaction types.

Pages Used to Integrate Price Lists

Page Name	Object Name	Navigation	Usage
Advanced Pricing - Price Lists	Oracle Applications	Order Management, Pricing, Price Lists, Price List Setup	Create price lists.
Create Condition Records	SAP	Logistics, Sales and Distribution, Master data, Conditions, Create Enter the transaction code <i>VK31</i> in the command field.	Create price lists.
Price List	PeopleSoft CRM	Order Pricing CRM, Pricing Configuration, Price Lists	Search for price lists.

Creating Price Lists in Oracle Applications

Access the Advanced Pricing - Price Lists screen.

To create price lists:

1. Enter the price list name and description.
2. Select Active.
3. Select the currency code and enter effective dates.
4. Specify the product context as *Item*.
5. Select the product attribute.
6. Enter the product value, unit of measure, line type, and item value.
7. Save the price list.

Creating Price Lists in SAP

Access the Create Condition Records screen.

To create price lists:

1. Select Prices, Price List.
2. Select the sales organization, distribution channel, price list type, and currency.
3. Enter values for the following:
 - Condition type.

- Material.
 - Rate.
 - Valid on and valid to dates.
4. Save the record.

If the price list created in SAP is purely based on material, the Name field is populated with the sales organization concatenated with distribution channel and condition type. For each material in a SAP price list, for the particular pricing condition, equivalent price list line items are created in PeopleSoft CRM.

If the SAP price list is based on price list type and currency, the Name field in the header of the PeopleSoft Price List page is populated with the sales organization concatenated with the distribution channel and price list type.

If the SAP price list created is based on a customer, the Name field in the header of the PeopleSoft Price List page is populated with the sales organization concatenated with the distribution channel and the first four letters of the customer name.
 5. To trigger the price list creation, enter the transaction code *BD21* in the command field.
 6. Select the message type as *COND_A*.

The outbound intermediate document is triggered, which guarantees that the price list has been created.

Checking Price Lists in PeopleSoft CRM

Access the Price List page.

Check for the following price list details in PeopleSoft CRM.

- Price list ID.
- Description.
- Status.

See *PeopleSoft Enterprise Pricer 8.9 PeopleBook*, “Creating Price Lists,” Setting Up Price Lists.

CHAPTER 5

Managing Orders

This chapter provides an overview of order management process and discusses how to:

- Check product availability.
- Integrate sales orders.
- Change order status.
- Propagate sales order updates from Oracle or SAP.
- Propagate sales order updates from PeopleSoft Order Capture.
- Receive order status updates.
- Integrate shipment information.
- View invoice details.
- View payment details.

Understanding Order Management

This section lists prerequisites and discusses order management process.

Prerequisites

Before you integrate Order Management business process objects, you need to:

- Map unit of measure values between Oracle or SAP and PeopleSoft CRM.
- Map currency types and codes between PeopleSoft CRM and Oracle or SAP.
- Map required storage locations in SAP and subinventories in Oracle applications as inventory locations in PeopleSoft.
- Synchronize customers and contacts between Oracle or SAP and PeopleSoft CRM.
- Synchronize products between Oracle or SAP and PeopleSoft CRM.
- Synchronize price lists between Oracle or SAP and PeopleSoft CRM.

Order Management

The Order Management business process spans PeopleSoft Order Capture and relevant Oracle and SAP applications. Price quotes and order entry are initiated in PeopleSoft CRM, and the order is processed in Oracle or SAP.

Once the order is submitted, its status is *Submitted*. At this point, no modifications can be implemented. However, after the order is propagated and an acknowledgement is received from Oracle or SAP, the order status changes to *In Fulfilment*, which allows order maintenance.

The business process flows like this:

1. The customer requests information regarding a product.
2. A sales order is created in PeopleSoft Order Capture with status *New*.
3. When the sales order is submitted, the CORE_ORDER_BP business project is triggered, and an installed product is created with status *Pending*. The order status changes to *Submitted*.
4. The customer service representative (CSR) checks for the availability of the product requested by the customer.
5. The submitted order is propagated from PeopleSoft Order Capture to Oracle or SAP.
Order processing is done in Oracle or SAP.
6. Oracle or SAP sends the order acknowledgement to PeopleSoft Order Capture.
The order status in PeopleSoft is updated to *In Fulfilment*.
7. The order details are changed in Oracle or SAP and propagated to PeopleSoft Order Capture.
8. The order details can be changed in PeopleSoft Order Capture and propagated to Oracle or SAP.
This is allowed only once.
9. The order is released, and when the product is available, it is shipped to the customer against the sales order.
If the item is available partially in the inventory, customer may be asked to accept partial shipment.
10. An advanced shipment notification is triggered from Oracle or SAP to PeopleSoft Order Capture, which updates the installed product status.

Checking Product Availability

This section provides an overview of product availability checking and discusses how to check for availability of sales order line items in PeopleSoft Order Capture.

Understanding Product Availability Checking

This integration point enables the CSR, who captures the order, to check for product availability in Oracle or SAP before confirming the order for the customer. The data is retrieved from Oracle or SAP and displayed in PeopleSoft Order Capture. The product availability is checked against the inventory.

This integration point is synchronous.

Pages Used to Check Product Availability

Page Name	Object Name	Navigation	Usage
Add Order	PeopleSoft CRM	Orders and Quotes, Add Order	Check the inventory balance for the sales order line item.
Find On-Hand Quantities	Oracle Applications	Inventory, On-Hand Availability, On-Hand Quantity	Check the inventory balance for the sales order line item.
Stock Overview	SAP	Logistics, Materials Management, Material master, Other, Stock Overview Enter the transaction code <i>MMBE</i> in the command field.	Check the inventory balance for the sales order line item.

Checking for Availability of Sales Order Line Items in PeopleSoft Order Capture

Access the Add Order page.

Note. You can check the product availability for a new sales order or an existing order.

To check for availability:

1. Enter the customer name and contact.
2. Enter the product name and click Add.

A line is added for the product specified, along with unit price and unit of measure.

By default, the ordered quantity is 1. You can change the value.

3. Click the Availability tab and then click the Check Availability link.

The product stock available in inventory is displayed.

The data is retrieved and displayed in PeopleSoft CRM. You can also view the data in Oracle or SAP.

Integrating Sales Orders

This section provides an overview of sales order integration, lists prerequisites, and discusses how to:

- Create sales orders in PeopleSoft Order Capture.
- Check sales orders in Oracle applications.
- Check sales orders in SAP.

Understanding Sales Order Integration

This integration point propagates order details captured in PeopleSoft Order Capture to Oracle or SAP for fulfillment and updating.

This integration point is asynchronous.

The sales order header and lines, no matter how many there are, are propagated at the same time. When a sales order is created in PeopleSoft Order Capture, the system requests the CORE_ORDER_BP business project. The Publish Order enterprise integration point (EIP) is triggered, and the order is propagated to Oracle or SAP.

Save the orders in PeopleSoft Order Capture to automatically integrate to Oracle or SAP.

Prerequisites

Before you integrate sales orders, you need to:

- Map PeopleSoft Order Capture business units to sales areas in SAP and operating units in Oracle.
- Define values in Oracle applications for:
 - Order priority order.
 - Transaction types (order and line types).
- Define values in SAP for:
 - Order type.
 - Sales order external number ranges.
 - Payment terms.
 - Inco terms.
- Define values in PeopleSoft Order Capture for:
 - Order source.
 - Auto numbering.
 - Promotion code.
 - Payment terms and payment methods.
 - Installed product definition and status.
 - Freight carriers.
- The order status in PeopleSoft Order Capture should be *Open*.

Pages Used to Integrate Sales Orders

Page Name	Object Name	Navigation	Usage
Add Order	PeopleSoft CRM	Orders and Quotes, Add Order	Create sales orders.
Sales Orders	Oracle Applications	Order Management, Orders, Returns, Order Organizer	Check for sales orders.
Display Sales Order	SAP	Logistics, Sales and Distribution, Sales, Order, Display Enter the transaction code <i>VA03</i> in the command field.	Check for sales orders.

Creating Sales Orders in PeopleSoft Order Capture

Access the Order Entry Form page.

To create sales orders:

1. Select the source of the order, customer name, and the primary sold-to contact.
2. Enter the product and click Add.
A line is added.
3. Enter the ordered quantity.
4. Click Update Total to refresh the total price of the product ordered.
5. Check the Billing and Shipping details and select the line for the destination.
6. Submit the order.

The CORE_ORDER_BP business process is initiated, and the order status changes to *Open*. An installed product is also created.

The submitted sales order is propagated to the Oracle or SAP for processing.

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook

Checking Sales Orders in Oracle Applications

Access the Find Orders screen.

To check for sales orders:

1. Specify the order source as *PSCRM*.
2. For the order reference, use the order number from PeopleSoft Order Capture.
3. Click OK.
4. Click Find.

The sales order created in PeopleSoft CRM is displayed. Check to see if all the details have been integrated.

Important! The order number is different from that in PeopleSoft Order Capture. This number is used for further processing.

See Also

Oracle applications 11.5.5 documentation

Checking Sales Orders in SAP

Access the Display Sales Order screen.

Enter the order number or the search criteria and click Search.

The sales order created in PeopleSoft Order Capture is displayed. Check to see if all details have been integrated.

See Also

SAP R/3 release 4.6C documentation

Changing Order Status

This section provides an overview of order status changes, lists prerequisites, and discusses how to check sales order status in PeopleSoft Order Capture.

Understanding Order Status Changes

This integration point propagates the order status to PeopleSoft Order Capture after the order is successfully created in Oracle or SAP. The order acknowledgement updates the status of the order to *In Process* and the order line status to *In Fulfillment*.

This integration point is asynchronous. The flow is from Oracle or SAP to PeopleSoft CRM.

Prerequisites

Before you integrate the order status, you need to:

- Propagate open sales orders from PeopleSoft Order Capture to Oracle or SAP.
- Check if the new order status is *Booked* in Oracle and *Open* in SAP.

Pages Used to Change Order Status

Page Name	Object Name	Navigation	Usage
Search Order	PeopleSoft CRM	Orders and Quotes, Search Order and Quotes	Update sales order status.
Sales Orders	Oracle Applications	Order Management, Orders, Returns, Order Organizer	Check for sales orders.
Change Sales Order	SAP	Logistics, Sales and Distribution, Sales, Order, Display Enter the transaction code VA03 in the command field.	Check for sales orders.

Checking Sales Order Status in PeopleSoft Order Capture

Access the Search Order page.

Retrieve the required sales order details and check if its status is *In Fulfillment*.

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, “Integrating with Fulfillment and Billing Systems,” Subscribing to Order and Quote Acknowledgements

Propagating Sales Order Updates from Oracle or SAP

This section provides an overview of updates from Oracle or SAP to PeopleSoft Order Capture, lists prerequisites, and discusses how to:

- Update sales order details in Oracle applications.
- Update sales order details in SAP.
- Check sales order details in PeopleSoft Order Capture.

Understanding Updates from Oracle or SAP to PeopleSoft Order Capture

This integration point propagates order updates in Oracle or SAP to PeopleSoft Order Capture. Tax and freight values are calculated in Oracle or SAP. These, with any other changes, are propagated.

With related objects, the system keeps a record of and link to the original quote or order, so that you can maintain a history of how the order progressed.

This integration point is asynchronous. Save the order updates in Oracle or SAP to automatically integrate to PeopleSoft Order Capture.

Prerequisites

Before you integrate the order updates, you need to make sure that:

- Sales order status in PeopleSoft Order Capture is *In Process*.
- The order status is *Booked* in Oracle applications and *Open* in SAP.

Pages Used to Propagate Sales Order Updates from Oracle or SAP

Page Name	Object Name	Navigation	Usage
Search Orders	PeopleSoft CRM	Orders and Quotes, Search Orders and Quotes	Search sales order updates.
Sales Orders	Oracle Applications	Order Management, Orders, Returns, Order Organizer	Update sales order details.
Change Sales Order	SAP	Logistics, Sales and Distribution, Sales, Order, Display Enter the transaction code <i>VA02</i> in the command field.	Update sales order details.

Updating Sales Order Details in Oracle Applications

Access the Sales Orders screen.

To update sales orders:

1. Retrieve an order.
2. For integrating order updates, modify the details for:
 - Freight values.
 - Tax values.
 - Order quantity.

For multiple line orders, you can change the quantity for one line or multiple lines.
3. Save the changes.

Updating Sales Order Details in SAP

Access the Change Sales Order screen.

To update sales orders:

1. Retrieve an order.
2. For integrating order updates, modify the details for:
 - Freight values.
 - Tax values.
 - Order quantity.

For multiple line orders, you can change quantity for one line or multiple lines.
3. Save the changes.

Checking Sales Order Details in PeopleSoft Order Capture

Access the Search Orders page.

To check for sales order updates:

1. Retrieve an order.
2. Check if the following updates were made:
 - The freight amount is added to the Total Charges grid.
 - The tax amount is added to Total Charges grid.
 - The order quantity is updated.

The change order quantity changes for both single and multiple lines are reflected.

See Also

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

Propagating Sales Order Updates from PeopleSoft Order Capture

This section provides an overview of updates from PeopleSoft Order Capture, lists prerequisites, and discusses how to:

- Update sales order details in PeopleSoft Order Capture.
- Check sales order details in Oracle applications.
- Check sales order details in SAP.

Understanding Updates from PeopleSoft Order Capture

This integration point propagates changes to the order from PeopleSoft Order Capture to Oracle or SAP. After each modification, you receive a confirmation from the target system regarding the acceptance of the modification.

When the order is modified in PeopleSoft Order Capture, the updates are propagated to Oracle or SAP only once. As the sales order changes in PeopleSoft Order Capture are not implemented using the Sales Order Change Notice EIP, sales order changes are propagated only once from PeopleSoft CRM to Oracle or SAP.

This integration point is asynchronous.

Save the order updates once in PeopleSoft Order Capture to automatically integrate to Oracle or SAP.

Prerequisites

Before you integrate the order updates, you need to:

- Check if the sales order status in PeopleSoft Order Capture is *In Fulfillment*.
- Check if the order status is *Booked* in Oracle applications and *Open* in SAP.

Pages Used to Propagate Sales Order Updates from PeopleSoft Order Capture

Page Name	Object Name	Navigation	Usage
Search Order	PeopleSoft CRM	Orders and Quotes, Search Orders and Quotes	Search sales orders and update details.
Sales Orders	Oracle Applications	Order Management, Orders, Returns, Order Organizer	Check for sales order updates.
Display Sales Order	SAP	Logistics, Sales and Distribution, Sales, Order, Display Enter the transaction code <i>VA03</i> in the command field.	Check for sales order updates.

Updating Sales Order Details in PeopleSoft Order Capture

Access the Search Orders page.

To update sales orders:

1. Retrieve an order.
2. For integrating order updates, modify the details for:
 - Ship-to or bill-to locations.
 - Site for installation.
 - Requested date.
 - Contacts.
 - Method of payment and payment terms.
 - Sales order lines.
 - Sales order lines order quantity.
3. Submit the changes, which saves and initiates the business project to propagate the changes.

See Also

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

Checking Sales Order Details in Oracle Applications

Access the Sales Orders screen.

To check sales order updates:

1. Retrieve an order.
2. Check if updates are reflected for:
 - Ship-to or bill-to locations.
 - Site for installation.

- Requested date.
- Contacts.
- Method of payment and payment terms.
- New sales order lines.
- Sales order lines order quantity.

The change order quantity changes for both single and multiple lines are reflected.

Checking Sales Order Details in SAP

Access the Display Sales Orders screen.

To check for sales order updates:

1. Retrieve an order.
2. Check if updates are reflected for:

- Ship-to or bill-to locations.
- Site for installation.
- Requested date.
- Contacts.
- Method of payment and payment terms.
- New sales order lines.
- Sales order lines order quantity.

The change order quantity changes for both single and multiple lines are reflected.

Propagating Sales Order Change Notice from Oracle Applications or SAP

This section provides an overview of Sales Order Change Notice from Oracle Applications or SAP to PeopleSoft Order Capture and lists prerequisites.

Understanding Sales Order Change Notice from Oracle Applications or SAP to PeopleSoft Order Capture

The purpose of this integration point is to propagate the Sales Order Change Notice or Status to the PeopleSoft CRM system after the order is successfully updated in either Oracle Applications or SAP system. This Sales Order Change Notice is sent as an acknowledgement of the updates made in the ERP system.

By doing so, the sales orders can be maintained in both PeopleSoft Order Capture and Oracle Applications or SAP systems.

This integration point is asynchronous.

Prerequisites

Before you integrate the sales order change notice, you need to make sure that:

- The sales order status in PeopleSoft Order Capture is *In Process*.
- The order status is *Booked* in Oracle Applications and *Open* in SAP.

Receiving Order Status Updates

This section provides an overview of sales order status changes, lists prerequisites, and discusses how to:

- Change order status in Oracle applications.
- Change order status in SAP.
- Refresh order status in PeopleSoft Order Capture.

Understanding Sales Order Status Changes

This integration point propagates changes to the order status from Oracle or SAP to PeopleSoft Order Capture.

This integration point is synchronous.

Save the order updates in PeopleSoft Order Capture to automatically integrate to Oracle or SAP.

Prerequisites

Before you receive the order status, you need to:

- Check if the sales order status in PeopleSoft Order Capture is *In Process*.
- Check if the order status is *Booked* in Oracle applications and *Open* in SAP.

Pages Used to Receive Order Status Updates

Page Name	Object Name	Navigation	Usage
Search Order	PeopleSoft CRM	Orders and Quotes, Search Quotes and Orders	Search sales orders and refresh status.
Sales Orders	Oracle Applications	Order Management, Orders, Returns, Order Organizer	Check sales order status.
Display Sales Order	SAP	Logistics, Sales and Distribution, Sales, Order, Display Enter the transaction code <i>VA03</i> in the command field.	Check sales order status.

Changing Order Status in Oracle Applications

Access the Sales Orders screen.

To change sales order status:

1. Retrieve an order.
2. Change the sales order header status or sales order line status.

See Also

Oracle applications 11.5.5 documentation

Changing Order Status in SAP

Access the Modify Sales Orders screen.

To change sales order status:

1. Retrieve an order.
2. Change the sales order header status or sales order line status.

See Also

SAP R/3 release 4.6C documentation

Refreshing Order Status in PeopleSoft Order Capture

Access the Search Orders page.

To refresh the sales order status:

1. Retrieve an order.
2. Click Refresh to update sales order status or sales order line status.

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, “Integrating with Fulfillment and Billing Systems,” Subscribing to Order Status Messages

Integrating Shipment Information

This section provides an overview of shipment integration, lists prerequisites, and discusses how to:

- Process sales orders in Oracle applications.
- Process sales orders in SAP.
- Check installed products in PeopleSoft Order Capture.

Understanding Shipment Integration

This integration point deals with installed product status updates.

This integration point is asynchronous from Oracle or SAP to PeopleSoft CRM.

Important! For nonserialized items, only one installed product is created for the complete quantity shipped. For serialized items, one installed product record is created for each serial number.

Prerequisites

Before you view invoice details, you need to:

- Define installed product definitions and status in PeopleSoft Order Capture.
- Define serial numbers for serialized items in Oracle or SAP.
- Check if the sales order status is *Booked* in Oracle and *Open* in SAP.

Pages Used to Integrate Shipment Information

Page Name	Object Name	Navigation	Usage
Release Sales Orders	Oracle Applications	Order Management, Shipping, Release Sales Orders, Release Sales Orders	Process sales orders.
Change Sales Order	SAP	Logistics, Sales and Distribution, Sales, Order, Display Enter the transaction code VA02 in the command field.	Process sales orders.
Installed Product	PeopleSoft CRM	Installed Products, Installed Product	Check for the installed product.

Processing Sales Orders in Oracle Applications

Access the Release Sales Orders screen.

To process sales orders:

1. Specify the order number and select the Inventory tab.
2. Specify the warehouse to which the item is to be shipped and click Online.
3. Using the Query Manager screen, retrieve the order.
4. In the shipment line details, check if the pick status of the order is *Staged*.
5. Select the Delivery tab.
6. Select *Ship Confirm* in the Actions field and click Go.
7. On the Confirm Delivery screen, click OK.

Processing Sales Orders in SAP

Access the Change Sales Order screen.

To process sales orders:

1. Retrieve the order.
2. Select *Delivery* from the Sales Document menu.
3. Select the Picking tab and enter the pickup quantity and storage location to which the stock is to be returned.

Important! If the product is serial-controlled, the system prompts you to enter the serial numbers.

- Click Post goods issue.

The delivery document is saved, which updates the installed product status in PeopleSoft Order Capture.

- Enter *WE02* in the command field to look for the outbound intermediate document that was created.

Checking Installed Product Status in PeopleSoft Order Capture

Access the Installed Product page.

View the installed product details and check if its status is *Installed*.

Note. After the installed product is updated, the sales order status in PeopleSoft Order Capture changes to *Completed*.

Viewing Invoice Details

This section provides an overview of invoice details, lists prerequisites, and discusses how to view invoice details in PeopleSoft Order Capture.

Understanding Invoice Details

This integration point enables you to view invoice details. The data from Oracle or SAP is retrieved and displayed in PeopleSoft Order Capture.

This integration point is synchronous.

Prerequisites

Before you view invoice details, you need to:

- Complete the 360-Degree View setup process.
- Assign the CRM user or CSR appropriate permissions to sign in into Oracle or SAP and view the required information.

Pages Used to View Invoice Details

Page Name	Object Name	Navigation	Usage
360-Degree View	PeopleSoft CRM	360-Degree View	View invoice details using 360-Degree view.

Viewing Invoice Details in PeopleSoft Order Capture

Access the 360-Degree View page.

To view invoice details:

- Select the customer. The overview for the selected customer is displayed.
- Click Bills.
The list of all bills appears.
- Click a bill number to view details.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up the 360-Degree View,” Setting Up the 360-Degree View Tree

Viewing Payment Details

This section provides an overview of payment details, lists prerequisites, and discusses how to view payment details in PeopleSoft Order Capture.

Understanding Payment Details

This integration point enables you to view customer payment details. The data from Oracle or SAP is retrieved and displayed in PeopleSoft CRM.

This integration point is synchronous.

Prerequisites

Before you view payment details, you need to:

- Complete the 360-Degree View setup process.
- Assign appropriate access permission to the CRM user or CSR to sign in into Oracle or SAP to view the required information.

Pages Used to View Payment Details

Page Name	Object Name	Navigation	Usage
360-Degree View	PeopleSoft CRM	360-Degree View	View payment details using 360-Degree view.

Viewing Payment Details in PeopleSoft Order Capture

Access the 360-Degree View page.

To view payment details:

1. Select the customer. The overview for the selected customer is displayed.
2. Click Payments.

The list of all payments for the customer appears.

3. Click a payment number to view details.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up the 360-Degree View,” Setting Up the 360-Degree View Tree

CHAPTER 6

Providing Service

This chapter provides an overview of service fulfillment process and discusses how to:

- Check item availability.
- Submit item requisitions.
- Receive expected receipts.
- Propagate service orders with time, expense, and material lines.
- Receive items.

Understanding Service Fulfillment

This section lists prerequisites and discusses service fulfillment process.

Prerequisites

Before you integrate Service Fulfillment business process objects, you need to:

- Map PeopleSoft CRM business units to plant locations in SAP and inventory organizations in Oracle.
- Synchronize items between PeopleSoft CRM and Oracle or SAP.
- Map unit of measure values between Oracle or SAP and PeopleSoft CRM.
- Map storage locations in SAP and subinventories in Oracle applications to inventory storage locations in PeopleSoft CRM.
- Synchronize customers, sites, and contacts between PeopleSoft CRM and Oracle or SAP.
- Define entitlements and warranties for customers and items in PeopleSoft CRM.

Service Fulfillment

The Service Fulfillment business process provides integration points that tie this process together between PeopleSoft FieldService and Oracle or SAP.

Service orders are initiated in PeopleSoft FieldService, and the processing is done in Oracle or SAP.

The Service Fulfillment process flows like this:

1. A customer calls regarding a problem with an installed product, which is received by a customer support representative (CSR).
2. The CSR checks service entitlements and contracts for the customer.

3. The CSR provides assistance over the phone.
4. If the issue is still not closed, a service order is created.
5. The service order is assigned to a service engineer.
6. The service engineer evaluates the need for service at the customer site.
If the item is to be replaced, availability is checked at two levels: for inventory location or provider group member.
7. If a required item is not available, a purchase requisition is submitted.
The requisition is propagated to Oracle or SAP.
8. In Oracle or SAP, the requisition is approved and a corresponding purchase order is created.
The service engineer can see when the material should arrive.
9. The items or parts are received at the customer site or service field.
This data is entered in PeopleSoft FieldService.
10. The received item is used and the service is completed.
11. The service engineer logs the material used, time spent, and other expenses for the service in PeopleSoft FieldService.
For each log, a line is added in the service order.
12. The `SERVICE_ORDER_SYNC` enterprise integration point (EIP) takes care of the used or removed material inventory adjustments for the service order. Accordingly, the inventory adjustments take place (the balance is reduced or increased).
If the service call was received in the warranty period, or if the service agreement requires free service, the cost is zero.
13. The service order is sent to the finance department to check for billing and contract conditions.
14. The order is closed with relevant finance updates, and the invoice is sent to the customer.

Checking Item Availability

This section provides an overview of item availability checking, lists prerequisites, and discusses how to check service order line item balances in PeopleSoft FieldService.

Understanding Item Availability Checking

This integration process is useful when the service engineer checks for the availability of the material, before ordering it for a service order line.

You can check for item balances in:

- Inventories associated with the members of the provider group assigned to the service order line.
- Business unit inventories.

The flow is from PeopleSoft FieldService to Oracle or SAP. The transaction is synchronous.

Prerequisites

Before you check item availability, you need to:

- Create provider groups and assign members to them in PeopleSoft FieldService.
- Assign storage locations for core group members.
- Create a service order.

Pages Used to Check Item Availability

Page Name	Object Name	Navigation	Usage
Manage Material	PeopleSoft CRM	Field Service, Service Orders, Manage Material	Receive the purchase order ID and link it to the service order line.
Find On-Hand Quantities	Oracle Applications	Inventory, On-Hand Availability, On-Hand Quantity	Check item balances.
Stock Overview	SAP	Logistics, Materials Management, Material master, Other, Stock Overview Enter the transaction code <i>MMBE</i> in the command field.	Check the item balance.
Service Order	PeopleSoft CRM	Field Service, Service Orders	Check the inventory balance for the service order line item.

Check Service Order Line Item Balances in PeopleSoft FieldService

Access the Manage Material page.

To check service order line balances:

1. Select an item and click View Related Links.
2. Click the Item Balance By Group Members or Item Balance By Business Units links.

See Also

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

Submitting Item Requisitions

This section provides an overview of item requisition generation, lists prerequisites, and discusses how to:

- Submit item requisitions in PeopleSoft FieldService.

- Check requisitions in Oracle applications.
- Check requisitions in SAP.

Understanding Item Requisition Generation

This integration point is initiated after you specify the item quantity required for service in PeopleSoft FieldService. A purchase requisition is sent to Oracle or SAP from PeopleSoft FieldService. Further processing is done in Oracle or SAP. Depending upon the material availability, the requisition is converted into either an interunit transfer request (item transferred from another inventory location) or a purchase order (from an external vendor).

For any requisition submitted, there are three possible scenarios:

- The complete order is fulfilled from within the organization in Oracle or SAP, and an interunit transfer order is created.
- The complete order cannot be fulfilled from within the organization in Oracle or SAP, and a purchase order for an external vendor is created.
- If the order can be fulfilled partially, you create a transfer order in the Oracle or SAP inventory system and a purchase order to the external vendor.

Save the requisitions in PeopleSoft FieldService to automatically integrate with Oracle or SAP.

Prerequisites

Before you submit a purchase requisition, you need to:

- Map valid requester IDs between PeopleSoft FieldService and Oracle or SAP.
- Check item availability.
- Define values in PeopleSoft FieldService for:
 - Service types.
 - Services.
 - Activity types.

Pages Used to Submit Item Requisitions

Page Name	Object Name	Navigation	Usage
Service Order	PeopleSoft CRM	Field Service, Service Orders	Submit a requisition for the service order line.
Requisition Summary	Oracle Applications	Purchasing, Requisitions, Requisition Summary	Check for the requisition.
Display: Purchase Requisition	SAP	Logistics, Materials Management, Purchasing, Purchase Requisition, Display Enter the transaction code <i>ME53</i> in the command field.	Check for the requisition.

Submitting Requisitions in PeopleSoft FieldService

Access the Service Order page.

To submit requisitions:

1. Click the Manage Material link.
2. Specify the item ID, requester, and quantity ordered.
3. Click Save.
4. (Optional) To submit requisitions for multiple items, add more lines.

Important! Once you save the service order line, the 10-digit requisition ID is generated, which is a combination of the material header ID and material line number.

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Ordering and Receiving Materials”

Checking Requisitions in Oracle Applications

Access the Requisition Summary screen.

To check for requisitions:

1. Retrieve and view requisition details.

Note. Requisition information can be modified only when the status is *Incomplete*.

2. Select the source for the transfer of items.

If it is an interunit transfer, the source is *Inventory*, and if it is external vendor purchase order, specify the source as *Supplier*.

3. Click Approve.

The interunit ID or purchase order is created.

See Also

Oracle applications 11.5.5 documentation

Checking Requisitions in SAP

Access the Display: Purchase Requisition screen.

Select the requisition ID. The requisition details are displayed.

Important! You can get the SAP reference for the requisition created in PeopleSoft FieldService from the confirmation business object document.

See Also

SAP R/3 release 4.6C documentation

Receiving Expected Receipts

This section provides an overview of expected receipts, lists prerequisites, and discusses how to:

- Create purchase orders in Oracle applications.
- Create purchase orders in SAP.
- Link purchase orders to the service order line in PeopleSoft FieldService.

Understanding Expected Receipts

This integration point enables field service engineers to view the status of the material receipt against the purchase requisition.

You can check for the status of the order using the requisition ID. You can check receipt information for either a purchase order or an interunit transfer order. Once a purchase order is generated, you look for the receipt information for the purchase order or an interunit transfer order. If the purchase order is not created, a message is displayed in PeopleSoft FieldService.

The flow is from Oracle or SAP to PeopleSoft FieldService. The transaction is synchronous.

Prerequisites

Before you can receive order details, you need to:

- Create supplier details in Oracle and SAP.
- Check that the requisition status in Oracle is *Approved*.

Pages Used to Receive Expected Receipts

Page Name	Object Name	Navigation	Usage
Create Purchase Order	Oracle Applications	Purchasing, Autocreate	Create a purchase order and approve it.
Create Purchase Order	SAP	Logistics, Material Management, Purchasing, Purchase Order, Create Enter the transaction code <i>ME21</i> in the command field.	Create a purchase order.
Manage Material	PeopleSoft CRM	Field Service, Service Orders, Manage Material	Receive the purchase order ID and link it to the service order line.

Creating Purchase Orders in Oracle Applications

Access the Find Requisition Lines screen.

To create purchase orders:

1. Retrieve requisition details.
2. On the Autocreate Documents screen, click Automatic.

3. Click Create.

The number of the purchase order created is displayed.

4. Submit the purchase order for approval.

A confirmation message appears.

Important! Depending on the hierarchy, the order is approved.

Note. The status of the purchase order should be *Approved* for this integration point.

Creating Purchase Orders in SAP

Access the Create Purchase Order screen.

To create a purchase order:

1. Select the vendor, purchase organization, and purchasing group.

For interunit transfer, specify the supplying plant instead of the vendor.

2. Click Reference to PReq.

3. Select the purchase requisition number and click Enter.

The new purchase order or interunit ID is created.

Note. The standard purchase order number appears in the status bar.

Linking Purchase Orders to the Service Order Line in PeopleSoft FieldService

Access the Manage Material page.

For the service line, click the Expected receiving link.

If the purchase order or interunit ID was created in Oracle or SAP, the corresponding value is retrieved.

Along with the purchase order number, the other field values integrated for Oracle are:

- Unit of measure.
- Ship quantity and ordered quantity.

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Service Order Management”

Propagating Service Orders with Time, Expense, and Material Lines

This section provides an overview of time, expense, and material details, lists prerequisites, and discusses how to:

- Create service orders in PeopleSoft FieldService.
- Enter used item details in PeopleSoft FieldService.
- Enter time details in PeopleSoft FieldService.
- Enter expense details in PeopleSoft FieldService.
- Close service orders in PeopleSoft FieldService.
- Check time, expense, and material details for service orders in Oracle applications.
- Check time, expense, and material details for service orders in SAP.

Understanding Time, Expense, and Material Details

This integration point enables the propagation of the service order, along with time, expense, and material details. When the service order is created, you specify whether it is billable.

Save the order details in PeopleSoft FieldService, the SERVICE_ORDER_SYNC EIP takes care of the inventory adjustments for the service order line items used or removed.

Note. Nonbillable activities associated with the service order are not propagated to Oracle or SAP. However, the material details are propagated for the inventory adjustments of used or removed material.

Prerequisites

Before you can integrate service orders with time, expense, and material details, you need to:

- Create workers and provider groups.
- Assign members to provider groups.
- Create entitlements and warranties for the customer in PeopleSoft FieldService.
- Define values in PeopleSoft FieldService for:
 - Entitlement plans.
 - Entitlements.
 - Agreements templates.
 - Agreements.
 - Service types.
 - Activity types.
 - Activity codes.
 - Cost categories.
 - Services.
- Create and synchronize a serviceable item STRT.
- Map expense types between PeopleSoft FieldService and Oracle or SAP.
- Attach storage locations to workers.

Pages Used to Propagate Service Orders with Time, Expense, and Material Lines

Page Name	Object Name	Navigation	Usage
Service Orders	PeopleSoft CRM	Field Service, Service Orders	Create service orders.
Manage Material	PeopleSoft CRM	Field Service, Service Orders, Manage Material	Add used or removed item details.
Manage Time	PeopleSoft CRM	Field Service, Service Orders, Manage Time	Add time details.
Manage Expense	PeopleSoft CRM	Field Service, Service Orders, Manage Expense	Add expense details.
Service Orders	PeopleSoft CRM	Field Service, Service Orders	Close a service order.
Sales Orders	Oracle Applications	Order Management, Returns, Orders, Order Organizer	View a service order and its lines.
Display Sales Orders	SAP	Logistics, Sales and Distribution, Sales, Order, Display Enter the transaction code /nVA03 in the command field.	View a service order and its lines.

Creating Service Orders in PeopleSoft FieldService

Access the Service Orders page.

Add service order details and save.

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Creating and Managing Service Orders”

Entering Used Item Details in PeopleSoft FieldService

Access the Manage Material page.

You can enter used and removed item quantity details.

To enter used item details:

1. Go to the service order line whose parts were received.
2. Expand the Used grid.
3. Enter the quantity used for the service.
4. Save the transaction.

Important! This task can be performed only after an item requisition is submitted and the item required for the service is received.

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Ordering and Receiving Materials”

Entering Time Details in PeopleSoft FieldService

Access the Manage Time page.

To enter time details:

1. Specify the values for:
 - Start date and time.
 - End date and time.
 - Total number of hours.
 - Billable status.
2. Save the record.

See Also

PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook

Entering Expense Details in PeopleSoft FieldService

Access the Manage Expenses page.

To enter expense details:

1. Specify the description, transaction date, expense type, amount, and billable amount.
2. Save the transaction.

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook

Closing Service Orders in PeopleSoft FieldService

Access the Service Orders page.

To close service orders:

1. Retrieve a service order.
2. Enter the actual start and end dates.
3. Enter the actual start and end times.
4. Change the status of service order line to *Closed*.
5. Click Billing information.
6. Select the Ready to Bill check box and click OK.
7. Change the service order status to *Closed* and save.

Important! The service order is only propagated from PeopleSoft FieldService to Oracle or SAP after the service order is closed.

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Creating and Managing Service Orders”

Checking Time, Expense, and Material Details in Oracle Applications

Access the Find Orders screen.

To check service orders:

1. Specify the order source as *PSCRM*.
2. Specify the order reference as the service order number in PeopleSoft FieldService.
3. Click Find.

The service order created in PeopleSoft FieldService appears.

4. Check for:
 - Service order header and line status.
 - Lines created for material, time, and expense details using the Line Items tab.

Note. The order number is different from the number used in PeopleSoft FieldService. Oracle applications recognize this number only.

See Also

Oracle applications 11.5.5 documentation

Checking Time, Expense, and Material Details in SAP

Access the Display Sales Order page.

To check service orders:

1. Retrieve an order.
2. View the details and check for:
 - Service order header and line status.
 - Lines created for material, time, and expense details.

See Also

SAP R/3 release 4.6C documentation

Receiving Items

This section provides an overview of item receipts, lists prerequisites, and discusses how to receive service order items in PeopleSoft FieldService.

Understanding Item Receipts

This integration point enables field service engineers to receive an item against the purchase order, corresponding to the purchase requisition. After the item received, it can be used, and the service completed. The service order is closed and is ready to bill, if billable.

Prerequisites

Before you can receive items, you need to:

- Create service entitlements and agreements for the customer.
- Create supplier details in Oracle or SAP.
- Create a purchase order or interunit ID in Oracle or SAP with *Approved* status.

Pages Used to Receive Items

Page Name	Object Name	Navigation	Usage
Manage Material	PeopleSoft CRM	Field Service, Service Orders, Manage Material	Receive item quantities for the service order line.
Find On-Hand Quantities	Oracle Applications	Inventory, On-Hand, Availability, On-Hand Quantity	Check item balances.
Stock Overview	SAP	Logistics, Materials Management, Material Master, Other, Stock Overview Enter the transaction code <i>MMBE</i> in the command field.	Check item balances.

Receiving Service Order Items in PeopleSoft FieldService

Access the Manage Material page.

To receive service order line items:

1. Click the Expected receiving link.
If the purchase order or interunit ID is created in Oracle or SAP, the corresponding value is retrieved.
2. In the Received grid, enter the item quantity received and save the record.

Important! The Received grid appears if automatic receiving has not been enabled for the business unit on the FieldService Definition page.

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Ordering and Receiving Materials”

CHAPTER 7

Processing Return Orders

This chapter gives an overview of the Service Return Material Authorizations (RMAs) process and discusses how to:

- Check item availability.
- Propagate RMA orders.
- Integrate installed products.

Understanding Service RMAs Process

This section lists prerequisites and discusses:

- Overall process flow.
- Advanced exchange process flow.
- Return and replace process flow.
- Repair and return process flow.
- Return to stock process flow.

Prerequisites

Before you integrate Service RMAs business process objects, you need to:

- Map PeopleSoft CRM business units to plant locations in SAP and inventory organizations in Oracle.
- Synchronize items between PeopleSoft CRM and Oracle or SAP.
- Map unit of measure values between Oracle or SAP and PeopleSoft CRM.
- Map required storage locations in SAP and subinventories in Oracle applications as inventory locations in PeopleSoft.
- Map currency types and codes between PeopleSoft CRM and Oracle or SAP.
- Synchronize price lists between PeopleSoft CRM and Oracle or SAP.
- Define call center business units as valid requisition sources in Oracle or SAP and enable them to create RMAs.
- Create return order types in PeopleSoft CRM.
- Define valid requester IDs.
- Create customer entitlements and warranties.

Overall Process Flow

The Service RMAs business process spans PeopleSoft Support and the relevant modules of Oracle applications and SAP back-office systems. This business process addresses:

- Requesting help.
- Resolving problems.
- Handling customer returns.
- Enhancing service agreements.

A customer service representative (CSR) may handle requests for product returns from customers. The CSR generates an RMA, which is the reference document to handle returns.

In the Service RMAs process, a support call is received from the customer. A CSR first creates a case, and then checks for the service entitlements and warranties for the customer. If the customer wants to return a product, the CSR creates an RMA. Processing differs depending on the RMA type: exchange, return for replacement, return for repair, and return to stock.

Advanced Exchange Process Flow

When a replacement item is shipped in advance, the process flows like this:

1. A customer speaks with a CSR regarding a problem with an installed product.
2. The CSR creates a case.
If the issue is resolved, the case is closed.
3. If the customer wants to return the item after receiving the new product, the CSR creates an RMA with type Advanced Exchange in PeopleSoft Support.
Specify the return and replacement item.
The replacement item in the RMA order can be the same as the returned item or different. The CSR checks for the availability of the replacement item.
When an advanced exchange RMA order is created, the purchase requisition enterprise integration point (EIP) is also fired. However, this EIP is not propagated to Oracle or SAP.
4. The RMA is propagated to Oracle or SAP.
Processing in Oracle applications involves booking the order, receiving the returns, checking for the increase in the on-hand quantity of the returned item, and shipping the replacement item.
Processing in SAP involves opening the order, delivering the item after specifying pickup quantity and storage location, and handling post-goods issue.
5. If the return and replacement items are the same, the installed product status is updated to *Installed*.
If the replacement item is different, a new installed product is created.

Return and Replace Process Flow

When customer replaces a product, the process flows like this:

1. A customer speaks with a CSR regarding a problem with an installed product.
2. The CSR creates a case.
If the issue is resolved, the case is closed.

3. If the customer wants to replace the item, the CSR creates an RMA with type Return and Replace in PeopleSoft Support.
4. The RMA order is propagated to Oracle or SAP.
5. The return item is received and the replacement item is shipped.
6. When the replacement item is received, the installed product status is updated to *Installed*.

Repair and Return Process Flow

When customers return products for repair, the process flows like this:

1. A customer speaks with a CSR regarding a problem with an installed product.
2. The CSR creates a case.
If the issue is resolved, the case is closed.
3. If the customer wants to repair the item, the CSR creates an RMA with type Repair and Return in PeopleSoft Support.
4. The RMA order is propagated to Oracle or SAP.
5. The order is processed in Oracle or SAP.
If the item is serialized, make sure that the same item is repaired and returned.
When the item is received for repair, the installed product status becomes *In Repair*.
6. When the repaired item is received, the installed product status is updated to *Installed*.

Return to Stock Process Flow

When customers return products, the process flows like this:

1. A customer speaks with a CSR regarding an installed product.
2. The CSR creates a case.
If the issue is resolved, the case is closed.
3. If the customer wants to return the item, the CSR creates an RMA with type Return to Stock in PeopleSoft Support.
4. The RMA order is propagated to Oracle or SAP.
Only one line is added for the return item.
5. If the item is returned and received in inventory, the RMA is closed.
The installed product status is updated to *Uninstalled*.

Checking Item Availability

This section provides an overview of item availability checking and discusses how to check availability for a return order line item in PeopleSoft Support.

Understanding Item Availability Checking

This integration point deals with item returns. The CSR opens a case for the support call. Then the CSR checks availability for the replacement item.

This integration is synchronous. The flow is from Oracle or SAP to PeopleSoft Support.

Pages Used to Check Item Availability

Page Name	Object Name	Navigation	Usage
RMA Header	PeopleSoft CRM	Support, Returns	Check availability of a replacement item.
Find On-Hand Quantities	Oracle Applications	Inventory, On-Hand, Availability, On-Hand Quantity	Check item availability.
Stock Overview	SAP	Logistics, Materials Management, Material Master, Other, Stock Overview Enter the transaction code <i>MMBE</i> in the command field.	Check item availability.

Checking Availability for a Return Order Line Item in PeopleSoft Support

Access the RMA Form page.

To check balance of replacement items:

1. Open the RMA page.
2. In the Replacement Item grid, select the item and click View Related Links.
3. Click the Item Balance link to view the item stock balance.

Important! The item availability check is required only if the RMA type is advanced exchange.

Propagating RMA Orders

This section provides an overview of RMA order integration, lists prerequisites, and discusses how to:

- Create RMA orders in PeopleSoft Support.
- Check RMA orders in Oracle applications.
- Check RMA orders in SAP.

Understanding RMA Order Integration

All customer interactions regarding returns for repair or replacement are first captured in PeopleSoft Support. Further processing, such as receipt, repair, creation of credit notes, and so on, is normally done in Oracle or SAP.

When CSRs create RMAs for the return, this information is propagated from PeopleSoft Support to Oracle or SAP. This integration is unidirectional from PeopleSoft Support to Oracle or SAP.

One time ship-to address on the RMA is not handled.

Prerequisites

Before you can propagate RMA orders, you need to:

- Create RMA types.
- Define inventory locations.
- Create support cases for the customer and product.
- Define values in Oracle applications for:
 - Sales order type.
 - Order source.
- Define the return order type (non-billable) in SAP.
- Map requestor ID values.
- Define values in PeopleSoft Support for:
 - RMA order numbering codes.
 - Case type.
 - Priority.
 - Severity.
 - Case status.
 - Source.
 - Problem codes.

Pages Used to Propagate RMA Orders

Page Name	Object Name	Navigation	Usage
RMA Header	PeopleSoft CRM	Support, Returns	Create new RMA orders.
Sales Order	Oracle Applications	Order Management, Orders, Returns, Order Organizer	Check for RMA orders.
Display Sales Order	SAP	Logistics, Sales and Distribution, Sales, Order, Display Enter the transaction code VA03 in the command field.	Check for RMA orders.

Creating RMA Orders in PeopleSoft Support

Access the RMA Form page.

To create RMA orders:

1. Create a case for the customer.
2. Create an RMA from the case page.
3. Select the RMA type, problem code, phone and email address.
4. Enter the item and quantity returned.
5. Enter the requestor ID.
6. (Optional) Enter the replacement item.
7. Click Save.

An RMA with a unique number is created.

Important! The RMA order returns a confirmation business object document after the order is propagated to Oracle or SAP.

See Also

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “Managing Material Returns,” Creating RMA Transactions

Checking RMA Orders in Oracle Applications

Access the Find Orders screen.

To check for sales orders:

1. Specify the order source as *PSCRM*.
2. Specify the order reference using the order number from PeopleSoft Order Capture.
3. Click OK.
4. Click Find.

The RMA order created in PeopleSoft Support is displayed. Check to see if all details have been integrated.

See Also

Oracle applications 11.5.5 documentation

Checking RMA Orders in SAP

Access the Display Sales Order screen.

Enter the order number or the search criteria and click Search.

The RMA order created in PeopleSoft Support is displayed. Check to see if all details have been integrated.

Important! The RMA order returns a confirmation business object document after the order is propagated to Oracle or SAP. The business object document provides the internal reference number for SAP.

See Also

SAP R/3 release 4.6C documentation

Integrating Installed Products

This section provides an overview of installed product integration and discusses how to:

- Process RMA orders in Oracle applications.
- Process RMA orders in SAP.
- Check installed products in PeopleSoft Support.

Understanding Installed Product Integration

Installed products are defined as products (items or services) installed at a customer site. Use this integration point to create or update an installed product.

Pages Used to Integrate Installed Products

Page Name	Object Name	Navigation	Usage
Release Sales Orders	Oracle Applications	Order Management, Shipping, Release Sales Orders, Release Sales Orders	Process sales orders.
Find Expected Receipts	Oracle Applications	Inventory, Transactions, Receiving, Receipts	Process sales orders for serialized items.
Change Sales Order	SAP	Logistics, Sales and Distribution, Sales, Order, Display Enter the transaction code VA02 in the command field.	Process sales orders.
Installed Product	PeopleSoft CRM	Installed Products, Installed Product	Check for installed products.

Processing RMA Orders in Oracle Applications

Access the Find Orders screen.

To process the RMA order for non-serialized replacement items:

1. Specify the order number and select the Inventory tab.
2. Specify the warehouse to which the item is to be shipped and click Online.

Note. For Return to Stock, only one line appears.

For Return to Replace, only one line appears. A message is sent to create a manual replacement order, which is shipped in the same manner as the replacement item.

For Repair and Return, two lines are created for advanced exchange.

3. Using the Query Manager screen, retrieve the order.
4. In the shipment line details, the pick status of the order should be *Staged*.
5. Select the Delivery tab.

6. Select *Ship Confirm* from the Actions field.
7. Click Go.
8. On the Confirm Delivery screen, click OK.

Note. The status of the replacement item line in the order is *Shipped*.

9. To receive the return item, on the Find Expected Receipts screen, specify the RMA order and retrieve it.
If the RMA type is Return to Stock and you are receiving returns, select the Create Debit memo check box.
10. For the receipt header, select the receipts line.
11. Enter the subinventory location and save the transaction.

Note. The status for the first line in the RMA order is now *Returned*.

Processing RMA Orders in SAP

Access the Display Sales Order screen.

To process RMA orders:

1. Retrieve an order.
2. Select *Deliver* from the Sales Document menu.
3. Enter the pickup quantity and storage location to which the stock is to be returned.
4. Click Post goods issue.
5. Enter *WE02* in the command field.

You can search for the intermediate document that was created.

Checking for Installed Products in PeopleSoft Support

Access the Installed Product page.

To check for installed products:

1. Retrieve the installed product.
2. View details and check if the status is *Installed*.

See Also

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “Managing Material Returns,” Creating RMA Transactions

CHAPTER 8

Troubleshooting CRM Process Integration Packs

This chapter discusses how to:

- Troubleshoot installation and deployment.
- Troubleshoot Oracle gateways.
- Troubleshoot customer integration.
- Troubleshoot sales order integration to Oracle.
- Troubleshoot sales order integration and sales order updates to SAP.
- Troubleshoot outbound order acknowledgements, sales order updates from SAP, and advanced shipment notification.
- Troubleshoot sales order updates from SAP.
- Troubleshoot inbound inventory transactions.
- Troubleshoot inbound purchase order requisitions in Oracle.
- Troubleshoot inbound requisition creation in SAP.
- Troubleshoot inbound receiving transactions in SAP.
- Troubleshoot inbound goods receipts.
- Troubleshoot inbound goods issue.
- Troubleshoot inbound Return Materials Authorization (RMA) order creation and updates in SAP.
- Troubleshoot inbound RMA order creation and updates in Oracle.
- Troubleshoot synchronous messages.

Troubleshooting Installation and Deployment

The following table lists tips for working around problems that you may encounter during or following the installation of CRM Process Integration Packs:

Problem	Cause	Resolution
You see a message that there is a socket exception.	The database server may not be up.	Restart the database server.
You see a message that the connection is closed.	The database could have been shut down and restarted.	Restart the gateway.

Problem	Cause	Resolution
Messages are not coming out of or going in to PeopleSoft.	<p>The messaging servers may not be configured.</p> <p>Message channels and messages may not be active.</p> <p>Nodes, transactions, and relationships may not be active.</p>	<p>Configure the messaging servers.</p> <p>Activate the messages and message channels.</p> <p>Activate the nodes, transactions, and relationships.</p>
Connector Component (Oracle Gateway/SAP Gateway/CRMnet Service Component) does not start up.	Port used by the connector is already in use by some other component/service.	<p>Change the port number of the connector in the *_conf.xml file and start the connector.</p> <p>Stop the service that is using the port, and then start the connector.</p>
Connector Component (Oracle Gateway/SAP Gateway/CRMnet Service Component) does not start up and the system cannot find the file	Connector is not able to load the Extensible Stylesheet Language (XSL) Templates into memory while starting up, as it is not able to find the files in the specified location.	<p>If the XSL files are not present in the component Bin folder, install the component again.</p> <p>If the problem still persists, contact technical support for help.</p>
Connector Component (Oracle Gateway/SAP Gateway/CRMnet Service Component) does not start up and the network adapter could not establish the SQL connection.	The database service is not up and running.	<p>If the database service is running, restart the connector component.</p> <p>If the database service is not running, start the database service and the connector.</p>
Properties file not found exception is displayed.	Properties files not copied onto PeopleSoft Server.	Copy crmpipservice properties and crmnetresources.properties files to the <PS_HOME>/appserv/<Domain> folder.
The messages not triggered from PeopleSoft after creation of business objects.	The messages and message channels are not active.	Activate the messages and message channels.
The CRR table is not updated properly after the business objects have been created.	The instance IDs may not be specified correctly in the properties files.	Update instance ID in properties files of all CRM PIP components.

Troubleshooting Oracle Gateways

Different issues may occur with inbound and outbound gateways.

Inbound

The following table lists solutions for problems with inbound gateways:

Problem	Cause	Resolution
The event status is 0 (NEW) in the status column of the ANET_INBND table.	<ul style="list-style-type: none"> An error occurred in the transformation from the Open Application Group (OAG) document to the Oracle Extensible Stylesheet Language (XSL) document. The event may be a duplicate event. DVMs may be wrong. 	<ul style="list-style-type: none"> Check the XSL transformation in the Gateway Console screen. Check the errors. Check with functional person and resend the message
The event status is 3 (ERROR) in the status column of the ANET_INBND table.	<ul style="list-style-type: none"> An error occurred in the prevalidation program. The event may be a duplicate event. 	<ul style="list-style-type: none"> Check the errors reported by the prevalidation program in the Error_Msg column of the ANET_INBND table. Make the corrections in the PeopleSoft application and resend the event. The gateway does not process duplicate events.
The event status is 2 (SUCCESS), and the object was not imported into Oracle applications.	<ul style="list-style-type: none"> An error occurred while importing the object into Oracle applications. The Oracle applications server may be down. The concurrent program manager may be down. 	<ul style="list-style-type: none"> Check the errors in the output and log files generated by the import concurrent program. Make the corrections in PeopleSoft and resend the event. Restart the Oracle applications server. Check the concurrent manager status. If the concurrent manager is down or inactive, restart it.

Outbound

This following table lists solutions for problems with outbound gateways:

Problem	Cause	Resolution
The event status is 0 (NEW) in the status column of ANET_OUTBND table.	The Oracle applications gateway is down.	Restart the Oracle applications gateway.
The event status is 3 (ERROR) in the status column of ANET_OUTBND table.	An error occurred while extracting the data from Oracle applications tables.	Inform the system administrator.
The event status is 2 (SUCCESS), and PeopleSoft did not receive the object.	An error occurred in the transformation from Oracle format to OAG XSL format.	Check the XSL transformation status in the Oracle Gateway Console screen.

Troubleshooting Customer Integration

The following table lists resolutions for possible problems with customer integration:

Problem	Cause	Resolution
The Error_Msg column in the ANET_INBND table displays a message that the system customer reference cannot be NULL.	The original system reference column (ANET_RA_CUSTOMERS_INT. ORIG_SYSTEM_CUSTOMER_REF) value is NULL.	Check the value in the DataArea /Party/UserArea/ OriginalReference tag of the OAG Extensible Markup Language (XML) document received by the Oracle gateway. This tag should contain a value. Resend the customer.
The Error_Msg column in the ANET_INBND table displays a message that the original system address reference cannot be NULL.	The original system reference column (ANET_RA_CUSTOMERS_INT. ORIG_SYSTEM_ADDRESS_REF) value is NULL.	Check the value in the DataArea /Party/Addresses/ Address/UserArea/ OriginalReference tag of the OAG XML document received by the Oracle gateway. This tag should contain a value. Resend the customer.
The Error_Msg column in the ANET_INBND table displays a message that the insert or update cannot be determined for the account.	The address reference in Oracle applications base tables with the specified original address reference and the corresponding customer reference was not found.	You might receive this error when you reinitialize the customer reference key generation sequence.
The Error_Msg column in the ANET_INBND table displays a message that the customer type for the account is invalid.	The Customer Type column (ANET_RA_CUSTOMERS_INT. CUSTOMER_TYPE) does not contain either <i>I</i> or <i>R</i> .	Check the value in the DataArea/Party /UserArea/ CustomerType tag of the OAG XML document received by the Oracle gateway. This tag should contain either <i>I</i> or <i>R</i> . Populate this field and resend the message.
The Error_Msg column in the ANET_INBND table displays a message that an address is required for the address reference.	The Address1 column (ANET_RA_CUSTOMERS_INT. ADDRESS1) does not contain the address.	Check the value in the DataArea /Party/Addresses/ Address/UserArea /AddressLine tag of the OAG XML document received by the Oracle gateway. This tag should contain a value. Check with the functional person and resend the message.

Problem	Cause	Resolution
The Error_Msg column in the ANET_INBND table displays a message that the primary site use code is invalid.	The Primary Site Use Flag column (ANET_RA_CUSTOMERS_INT. PRIMARY_SITE_USE_FLAG) does not contain either <i>Y</i> or <i>N</i> .	Check the values in the DataArea/Party/Addresses/ Address/UserArea/PrimaryBillTo and DataArea/Party/Addresses/ Address/UserArea/PrimaryShipTo and DataArea/Party/Addresses/ Address/UserArea/PrimarySoldTo tags of the OAG XML document received by the Oracle gateway. These tags should contain either <i>Y</i> or <i>N</i> . Populate this tag and resend the message.
The Error_Msg column in the ANET_INBND table displays a message that the customer status is invalid.	The Customer Status column (ANET_RA_CUSTOMERS_INT. CUSTOMER_STATUS) does not contain either <i>A</i> or <i>I</i> .	Check the value in the DataArea/Party /UserArea/Active tag of the OAG XML document received by the Oracle gateway. This tag should contain either <i>A</i> or <i>I</i> . Populate this tag and resend the message.
The Error_Msg column in the ANET_INBND table displays a message that the country doesn't exist.	The Country column (ANET_RA_CUSTOMERS_INT. COUNTRY) does not contain a valid country code.	Check whether the country code exists in the defined territories of Oracle applications. Contact the functional person.
The Error_Msg column in the ANET_INBND table displays a message that the site code is invalid.	The Site Use Code column (ANET_RA_CUSTOMERS_INT. SITE_USE_CODE) does not contain a valid site use code.	Check whether the site use code exists in the defined sites or Oracle applications. Contact the functional person.
The Error_Msg column in the ANET_INBND table displays a message that the customer category is invalid.	The Customer Category column (ANET_RA_CUSTOMERS_INT. CUSTOMER_CATEGORY_CODE) does not contain a valid customer category code.	Check whether the customer category code exists in the defined customer categories of Oracle applications. Contact the functional person.
The Error_Msg column in the ANET_INBND table displays a message that the customer name cannot be NULL.	The Customer Name column (ANET_RA_CUSTOMERS_INT. CUSTOMER_NAME) does not contain a customer name.	Check the value in the DataArea /Party/Name tag of the OAG XML document received by the Oracle gateway. This tag should contain a customer name. Edit the Customer name and resend the message.
The Error_Msg column in the ANET_INBND table displays a message that the county cannot be NULL.	The County column (ANET_RA_CUSTOMERS_INT. COUNTY) does not contain a county.	Check the value in the DataArea/Party /Addresses/ Address/County tag of the OAG XML document received by the Oracle gateway. This tag should contain a county name. Add a DVM and resend the message.

Problem	Cause	Resolution
The Error_Msg column in the ANET_INBND table displays a message that the profile class is invalid.	The profile class specified in the user-defined parameters does not exist in Oracle applications.	Define the customer profile class with the name specified in the user defined parameters (PARAMETER_NAME = CUSTOMER_PROFILE_CLASS in the ANET_PARAMETERS table)
The Error_Msg column in the ANET_INBND table displays a message that the currency code is not defined or is inactive.	The currency specified in the user-defined parameters does not exist in Oracle applications.	Define the currency with the name specified in the user-defined parameters (PARAMETER_NAME = CUSTOMER_PROFILE_CURRENCY in the ANET_PARAMETERS table)
The Error_Msg column in the ANET_INBND table displays a message that the telephone type is invalid.	The Telephone Type column (ANET_RA_CONTACT_PHONES_INT.TELEPHONE_TYPE) does not contain a telephone type.	Check whether the telephone type exists in the defined telephone types for Oracle applications. Contact the functional person.
The Error_Msg column in the ANET_INBND table displays a message that the contact title is invalid.	The Contact Title column (ANET_RA_CONTACT_PHONES_INT. CONTACT_TITLE) does not contain a contact title.	Check whether the contact title exists in the defined contact titles for Oracle applications. Contact the functional person.
The Error_Msg column in the ANET_INBND table displays a message that both the contact reference and telephone reference cannot be NULL.	The Contact Reference column (ANET_RA_CONTACT_PHONES_INT.ORIG_SYSTEM_CONTACT_REF) or the telephone reference column (ANET_RA_CONTACT_PHONES_INT.ORIG_SYSTEM_TELEPHONE_REF) does not contain a reference.	Check the value in the DataArea /Party/Contacts/ Contact/UserArea/ OriginalReference. This tag should contain a value. Resend the customer.

Troubleshooting Sales Order Integration to Oracle

The following table lists sales order integration problems and resolutions:

Problem	Cause	Resolution
The Error_Msg column in the ANET_INBND table displays a message that the order source cannot be decided.	The Order Source column (ANET_OE_HEADERS_IFACE_ALL.ORDER_SOURCE) value is NULL, or the order source was not found for the SOURCE_CODE user-defined parameter.	<p>Check the value in the DataArea /SalesOrder/Header/UserArea/OrderSource tag of the OAG XML document received by the Oracle gateway. If this tag contains a value, that order source should exist in Oracle applications.</p> <p>If the tag value is NULL, define the order source with the name specified in the user-defined parameters (PARAMETER_NAME = SOURCE_CODE in the ANET_PARAMETERS table).</p>
The Error_Msg column in the ANET_INBND table displays a message that the order type was not found.	The Order Type column (ANET_OE_HEADERS_IFACE_ALL.ANET_ORDER_TYPE) value is NULL.	<p>Check the value in the DataArea /SalesOrder/Header/OrderStatus/UserArea/OrderType tag of the OAG XML document received by the Oracle gateway. This tag should contain a value.</p> <p>Add a DVM and resend the message.</p>
The Error_Msg column in the ANET_INBND table displays a message that the customer reference is invalid.	The Sold To Org ID column (ANET_OE_HEADERS_IFACE_ALL.SOLD_TO_ORG_ID) value is invalid.	<p>The value inserted into SOLD_TO_ORG_ID column of the ANET_OE_HEADERS_IFACE_ALL table is not a valid customer ID in Oracle applications.</p> <p>Resend the customer and create the order again.</p>
The Error_Msg column in the ANET_INBND table displays a message that the customer ID cannot be determined.	The Sold To Org ID column (ANET_OE_HEADERS_IFACE_ALL.SOLD_TO_ORG_ID) value is NULL.	Check the value in the DataArea /SalesOrder/Header/Parties/UserArea/OriginalSoldToReference tag of the OAG XML document received by the Oracle gateway. This tag should contain a value. Resend the customer and create the order again.
The Error_Msg column in the ANET_INBND table displays a message that the ship-to address is invalid.	The Sold To Org Id column (ANET_OE_HEADERS_IFACE_ALL.SHIP_TO_ORG_ID) value is invalid.	The value inserted into SHIP_TO_ORG_ID column of the ANET_OE_HEADERS_IFACE_ALL table is not a valid address ID, or that customer does not have a ship-to site defined in Oracle applications. Contact the functional person.
The Error_Msg column in the ANET_INBND table displays a message that the ship-to address cannot be determined.	The Sold To Org IDcolumn (ANET_OE_HEADERS_IFACE_ALL.SHIP_TO_ORG_ID) value is NULL.	Check the value in the DataArea /SalesOrder/Header/Parties/UserArea/OriginalShipToOrgReference tag of the OAG XMLdocument received by the Oracle gateway. This tag should contain a value. Resend the customer and create the order again.

Problem	Cause	Resolution
The Error_Msg column in the ANET_INBND table displays a message that the invoice is invalid.	The Invoice To Org ID column (ANET_OE_HEADERS_IFACE_ALL.INVOICE_TO_ORG_ID) value is invalid.	The value inserted into INVOICE_TO_ORG_ID column of the ANET_OE_HEADERS_IFACE_ALL table is not a valid address ID, or that customer does not have a bill-to site defined in Oracle applications. Resend the customer and create the order again.
The Error_Msg column in the ANET_INBND table displays a message that an invoice ID wasn't found for the header reference.	The Invoice To Org ID column (ANET_OE_HEADERS_IFACE_ALL.INVOICE_TO_ORG_ID) value is invalid.	Check the value in the DataArea /SalesOrder/Header/Parties/UserArea /OriginalBillToOrgReference tag of the OAG XML document received by the Oracle gateway. This tag should contain a value. Resend the customer and create the order again.
The Error_Msg column in the ANET_INBND table displays a message that the item ID is invalid.	The Organization ID and Inventory Item ID columns (ANET_OE_LINES_IFACE_ALL.ORGANIZATION_ID, ANET_OE_LINES_IFACE_ALL.INVENTORY_ITEM_ID) do not contain a valid organization ID and inventory item ID.	The inventory item does not exist in the specified organization in Oracle applications.
The Error_Msg column in the ANET_INBND table displays a message that the line type is invalid.	The Order Type column (ANET_OE_HEADERS_IFACE_ALL.ANET_ORDER_TYPE) value is NULL, or the line type is not in the concatenated values list.	Check the value in the DataArea /SalesOrder/Header/OrderStatus/UserArea/OrderType tag of the OAG XML document received by the Oracle gateway. This tag should contain a value. Add a DVM and resend the message.

Troubleshooting Sales Order Integration and Sales Order Updates to SAP

The following table lists sales order integration problems and resolutions:

Problem	Cause	Resolution
You see a message that the sales document is not yet complete.	One of the following fields does not exist: INCOTERMS1, INCOTERMS2, PMNTTRMS, or REQ_QTY.	Add the DVMs and resend the message.
You see a message that the sales organization does not exist.	The SALES_ORG field does not exist or was provided incorrectly.	Add the DVMs and resend the message.

Problem	Cause	Resolution
You see a message that the sales area does not exist.	The SALES_ORG, DISTR_CHAN, or DIVISION field was given incorrectly.	Add the DVMs and resend the message.
You see a message that the condition is missing in the pricing procedure.	The COND_TYPE field is not given correctly.	Add the DVMs and resend the message.
When you change the schedule line, an item number is missing.	The ITM_NUMBER field is missing.	Add the DVMs and resend the message.

Troubleshooting Outbound Order Acknowledgements, Sales Order Updates from SAP, and Advanced Shipment Notification

The following table lists order acknowledgement problems and resolutions:

Problem	Cause	Resolution
The event status is 0 (NEW) in the status column of the ANET_OUTBND table.	The SAP gateway is down.	Restart the SAP gateway.
The event status is 3 (ERROR) in the status column of the ANET_OUTBND table.	An error occurred while extracting the data from SAP applications tables.	Inform the systems administrator.
The event status is 2 (SUCCESS), and PeopleSoft applications did not receive the object.	An error occurred in the transformation from SAP native format to OAG XSL format.	Check the XSL transformation status in the SAP Gateway Console screen.
An entry is not created in the ANET_OUTBND table, but an SAP intermediate document was triggered.	The SAP receiver gateway is down.	Restart the SAP receiver gateway.
An intermediate document was not created, but the triggering mechanism fired.	The intermediate document message type setting may not be correct.	Inform the intermediate document administrator.

Troubleshooting Inbound Inventory Transactions

The following table lists inventory transaction problems and resolutions.

Problem	Cause	Resolution
The Error_Msg column in the ANET_INBND table displays a message that the item ID is invalid.	The Organization ID and Inventory Item ID columns (ANET_MTL_TRANSACTION_INT. ORGANIZATION_ID, ANET_MTL_TRANSACTION_INT. INVENTORY_ITEM_ID) do not contain a valid organization ID and inventory item ID.	The inventory item does not exist in the specified organization in Oracle applications or SAP. Create the item and resend the message.
The Error_Msg column in the ANET_INBND table displays a message that a miscellaneous account is missing.	The Miscellaneous Account ID column (ANET_PARAMETERS. MISCELLANEOUS_ACCOUNT_ID) column value is NULL.	Enter a valid miscellaneous account ID in the MISCELLANEOUS_ACCOUNT_ID parameters VALUE column in the ANET_PARAMETERS table.

Troubleshooting Inbound Purchase Order Requisitions in Oracle

The following table lists purchase order requisition problems and resolutions:

Problem	Cause	Resolution
The Error_Msg column in the ANET_INBND table displays a message that the source organization code does not exist.	The source organization code column (ANET_PO_REQUISITIONS_INT. SOURCE_ORGANIZATION_CODE) value is either NULL or not a valid Oracle-defined organization code.	Check the value in the DataArea /Requisition/Header/Site/Id tag of the OAG XML document received by the Oracle gateway. This tag should contain a valid Oracle applications organization code. Add a DVM and resend the message.
The Error_Msg column in the ANET_INBND table displays a message that the destination organization code does not exist.	The destination organization code column (ANET_PO_REQUISITIONS_INT. DESTINATION_ORGANIZATION_CODE) value is either NULL or not a valid Oracle-defined organization code.	Check the value in the DataArea /Requisition/Line/Site/Id tag of the OAG XML document received by the Oracle gateway. This tag should contain a valid Oracle applications organization code. Add a DVM and resend the message.
The Error_Msg column in the ANET_INBND table displays a message that an organization ID was not found for the source organization code.	The source organization code column (ANET_PO_REQUISITIONS_INT. SOURCE_ORGANIZATION_CODE) value is not a valid Oracle defined organization code.	Check the value in the DataArea /Requisition/Header/Site/Id tag of the OAG XML document received by the Oracle gateway. This tag should contain a valid Oracle applications organization code.

Problem	Cause	Resolution
The Error_Msg column in the ANET_INBND table displays a message that an organization ID was not found for the destination organization code.	The Destination Organization Code column (ANET_PO_REQUISITIONS_INT. DESTINATION_ORGANIZATION_CODE) column value is not a valid Oracle-defined organization code.	Check the value in the DataArea /Requisition/Line/Site/Id tag of the OAG XML document received by the Oracle gateway. This tag should contain a valid Oracle applications organization code.
The Error_Msg column in the ANET_INBND table displays a message that the item ID does not exist.	The Source Organization and Inventory Item ID columns (ANET_PO_REQUISITIONS_INT. SOURCE_ORGANIZATION_CODE, ANET_PO_REQUISITIONS_INT. INVENTORY_ITEM_ID) should contain a valid organization code and inventory item ID.	The specified inventory item does not exist in the specified source organization in Oracle applications. Sync the item and resend the message.
The Error_Msg column in the ANET_INBND table displays a message that the operating unit was not found.	The source organizations operating unit was not found in the organization definitions.	Check the value in the DataArea /Requisition/Header/Site/Id tag of the OAG XML document received by the Oracle gateway. This tag should contain a valid Oracle applications organization code. If this tag contains a valid organization code, and check whether the code has an operating unit in the Oracle organization definitions.
The Error_Msg column in the ANET_INBND table displays a message that the preparer ID does not exist in the employees list.	The Preparer ID column (ANET_PO_REQUISITIONS_INT. PREPARER_ID) value is NULL or not a valid employee ID in Oracle applications.	The value inserted into the PREPARER_ID column of the ANET_PO_REQUISITIONS_INT table is not a valid employee ID in Oracle applications.
The Error_Msg column in the ANET_INBND table displays a message that the destination location ID cannot be determined for the destination organization.	The location ID for the destination organization was not found in the organization definitions.	Check the value in the DataArea /Requisition/Line/Site/Id tag of the OAG XML document received by the Oracle gateway. This tag should contain a valid Oracle applications organization code. If this tag contains a valid organization code, and check whether the code has a location ID or in the Oracle organization definitions.

Troubleshooting Inbound Requisition Creation in SAP

The following table lists purchase requisition create problems and resolutions in SAP:

Problem	Cause	Resolution
A message that the Plant is not defined is displayed.	The Plant field is not given or is incorrect.	Check for the following field in the respective table in native SAP XML. REQUISITION_ITEMS PLANT Add a DVM and resend the message.
A message that the material group is not defined is displayed.	The MAT_GRP field is not given or is incorrect.	Check for the following field in the respective table in native SAP XML. REQUISITION_ITEMS MAT_GRP Add a DVM and resend the message.
A message that the document type is not allowed with doc. category B is displayed.	The DOC_TYPE field is not given or is incorrect.	Check for the following field in the respective table in native SAP XML. REQUISITION_ITEMS DOC_TYPE Add a DVM and resend the message.
A message that the material does not exist or is not activated is displayed.	The MATERIAL field is not given or is incorrect.	Check for the following field in the respective table in native SAP XML. REQUISITION_ITEMS MATERIAL Sync the material and resend the message.

Troubleshooting Inbound Receiving Transactions

The following table lists receiving transaction problems and resolutions:

Problem	Cause	Resolution
The Error_Msg column in the ANET_INBND table displays a message that the item ID is invalid.	The To Organization Code and Inventory item ID columns (ANET_RCV_TRANSACTIONS_INT.TO_ORGANIZATION_CODE, ANET_RCV_TRANSACTIONS_INT.INVENTORY_ITEM_ID) do not contain a valid organization code and inventory item ID.	The inventory item does not exist in the specified organization in Oracle applications. Sync the item and resend the message.

Problem	Cause	Resolution
The Error_Msg column in the ANET_INBND table displays a message that the organization code does not exist.	The To Organization Code column (ANET_RCV_TRANSACTIONS_INT. TO_ORGANIZATION_CODE) does not contain a valid Oracle organization code.	Check the value in the Header /Charges/Charge/Distribution/Business/RelatedUnit/Unit/Id tag of the OAG XML document received by the Oracle gateway. This tag should contain a valid Oracle organization code. Add a DVM and resend the message.
The Error_Msg column in the ANET_INBND table displays a message that the ship-to code does not exist.	The To Organization Code column (ANET_RCV_HEADERS_INT. SHIP_TO_ORGANIZATION_CODE) does not contain a valid Oracle organization code.	Check the value in the DataArea /DeliveryReceipt/Header/Charges/Charge/Distribution/Business/RelatedUnit/Unit/Id tag of the OAG XML document received by the Oracle gateway. This tag should contain a valid Oracle organization code. Add a DVM and resend the message.
The Error_Msg column in the ANET_INBND table displays a message that the employee ID does not exist in the employees list	The Employee ID column (ANET_RCV_HEADERS_INT. EMPLOYEE_ID) value is NULL or not a valid Oracle employee ID.	The value inserted into the EMPLOYEE_ID column of the ANET_RCV_HEADERS_INT table is not a valid Oracle employee ID.

Troubleshooting Inbound Goods Receipt

The following table lists goods receipt problems and resolutions:

Problem	Cause	Resolution
You see a message that no goods receipt possible for purchase order.	The PO_NUMBER and PO_ITEM field values are not given or are incorrect.	Check for the following fields in their respective structures in native SAP XML. GOODSMVT_HEADER: PO_NUMBER PO_ITEM
You see a message that the material document data and PO data do not match (Material)	The MATERIAL field is not given or is incorrect.	Check for the following fields in their respective structures in native SAP XML. GOODSMVT_HEADER: MATERIAL Sync the material and resend the message.

Problem	Cause	Resolution
You see a message that the material document data and PO data do not match (Plant).	The PLANT field value is not given or is incorrect.	Check for the following fields in their respective structures in native SAP XML. GOODSMVT_HEADER: PLANT Add a DVM and resend the message.
You see a message that the material document data and PO data do not match (Storage location)	The STGE_LOC field is not given or is incorrect.	Check for the following fields in their respective structures in native SAP XML. GOODSMVT_HEADER: STGE_LOC Add a DVM and resend the message.
You see a message that posting only possible in periods YYYY/MM and YYYY/MM in company code	The correct posting periods are not maintained in SAP	Contact the SAP functional resource to resolve the posting periods issue.
You see a message that stock data of serial number is not suitable for movement	For serialized material, the SERIALNO field is not given correctly.	Check for the following field in their respective table in native SAP XML. GOODSMVT_SERIALNUMBER SERIALNO Contact the functional person.
You see a message to maintain serial numbers for total quantity	The MATDOC_ITM and SERIALNO field values are missing.	Check for the following field in their respective table in native SAP XML. GOODSMVT_SERIALNUMBER MATDOC_ITM SERIALNO Contact the functional person.
You see a message that the movement type is not supported.	The MOVE_TYPE field is incorrect.	Check for the following fields in their respective tables in native SAP XML. GOODSMVT_ITEM MOVE_TYPE Add a DVM and resend the message.

Problem	Cause	Resolution
You are prompted to enter the movement type.	The MOVE_TYPE field is not given.	Check for the following fields in their respective tables in native SAP XML. GOODSMVT_ITEM MOVE_TYPE Add a DVM and resend the message.
You see a message that the unit of measure can not be converted to stock keeping unit.	The proper unit of measure is not given	Check for the following fields in their respective tables in native SAP XML. ENTRY_UOM
You see a message that the update control of movement type is incorrect.	The MVT_IND field is incorrect.	Check for the following fields in their respective tables in native SAP XML. GOODSMVT_ITEM MVT_IND Add a DVM and resend the message.

Troubleshooting Inbound Goods Issue

The following table lists the goods issue problems and resolutions:

Problem	Cause	Resolution
You see a message that the sales document is not available.	The SALES_ORD field may be incorrect.	Check for the following fields in their respective structures in native SAP XML. GOODSMVT_HEADER: SALES_ORD
You see a message that the item in sales document does not exist.	The S_ORD_ITEM field may be incorrect.	Check for the following fields in their respective structures in native SAP XML. GOODSMVT_HEADER: S_ORD_ITEM
You see a message that posting is only possible in periods YYYY/MM and YYYY/MM in company code.	The correct posting periods are not maintained in SAP	Contact the SAP functional resource to resolve the posting periods issue.

Problem	Cause	Resolution
You see a message that the stock data of serial number is not suitable for movement.	For a serialized material, the SERIALNO field may be incorrect.	Check for the following field in their respective table in native SAP XML. GOODSMVT_SERIALNUMBER SERIALNO Contact functional person.
You see a message to maintain serial numbers for total quantity.	The MATDOC_ITM and SERIALNO fields are missing.	Check for the following field in their respective table in native SAP XML. GOODSMVT_SERIALNUMBER MATDOC_ITM SERIALNO Contact functional person.
You see a message that the material is not maintained in plant.	The MATERIAL field value is incorrect.	Check for the following fields in their respective tables in native SAP XML. GOODSMVT_ITEM MATERIAL Contact functional person.
You see a message that no stock posting possible for this material.	The MATERIAL field is not given.	Check for the following fields in their respective tables in native SAP XML. GOODSMVT_ITEM MATERIAL Add a DVM for plant and resend the message.
You see a message that the plant is not supported.	The PLANT field is incorrect.	Check for the following fields in their respective tables in native SAP XML. GOODSMVT_ITEM PLANT Add a DVM and resend the message.
A message prompting you to enter the plant is displayed.	The PLANT field is not given.	Check for the following fields in their respective tables in native SAP XML. GOODSMVT_ITEM PLANT Add a DVM and resend the message.

Problem	Cause	Resolution
You see a message that the Storage location is not supported.	The STGE_LOC field is incorrect.	Check for the following fields in their respective tables in native SAP XML. GOODSMVT_ITEM STGE_LOC Add a DVM and resend the message.
A message prompting you to enter the storage location is displayed.	The STGE_LOC field is not given.	Check for the following fields in their respective tables in native SAP XML. GOODSMVT_ITEM STGE_LOC Add a DVM and resend the message.
You see a message that the movement type is not supported.	The MOVE_TYPE field is incorrect.	Check for the following fields in their respective tables in native SAP XML. GOODSMVT_ITEM MOVE_TYPE
A message prompting you to enter the movement type is displayed.	The MOVE_TYPE field is not given.	Check for the following fields in their respective tables in native SAP XML. GOODSMVT_ITEM MOVE_TYPE
You see a message that the unit of measure is not convertible to stock keeping unit.	The ENTRY_UOM field value may be incorrect.	Check for the following fields in their respective tables in native SAP XML. ENTRY_UOM
A message prompting you to maintain the serial numbers for total quantity is displayed.	The MATDOC_ITM and SERIALNO field values are missing.	Check for the following field in their respective table in native SAP XML. GOODSMVT_SERIALNUMBER MATDOC_ITM SERIALNO
You see a message that the CODE is not supported by BAPI2017_GOODSMVT_CREATE.	The GM_CODE field may be incorrect.	Check for the following fields in their respective Structure in native SAP XML. GOODSMVT_CODE GM_CODE

Troubleshooting Inbound RMA Order Creation and Updates in SAP

The following table lists RMA creation problems and resolutions.

Problem	Cause	Resolution
You see the message that sales document type is not defined	The DOC_TYPE field is not given or is incorrect.	<p>In case of creation of RE ORDER in SAP, check for the following fields in their respective structures/tables in native SAP XML.</p> <p>RETURN_HEADER-IN:</p> <p>DOC_TYPE</p> <p>In case of creation of SD ORDER in SAP, check for the following fields in their respective structures/tables in native SAP XML.</p> <p>ORDER-HEADER-IN:</p> <p>DOC_TYPE</p> <p>Check the existing DVMs with the ones provided with the setup.</p>
You see the message that terms of delivery are not defined.	The INCOTERMS1 field is not given or is incorrect.	<p>In case of creation of RE ORDER in SAP, Check for the following fields in their respective structures in native SAP XML.</p> <p>RETURN-HEADER-IN</p> <p>INCOTERMS1</p> <p>In case of creation of SD ORDER in SAP, Check for the following fields in their respective structures in native SAP XML.</p> <p>ORDER-HEADER-IN:</p> <p>INCOTERMS1.</p> <p>Check the existing DVMs with the ones provided with the setup.</p>

Problem	Cause	Resolution
You see the message that no customer master record exists for customer.	The PARTN_NUMB field is incorrect.	<p>In case of creation of RE ORDER in SAP, Check for the following fields in their respective structures in native SAP XML.</p> <p>RETURN_PARTNERS:</p> <p>PARTN_NUMB</p> <p>In case of creation of SD ORDER in SAP, Check for the following fields in their respective structures in native SAP XML.</p> <p>ORDER_PARTNERS:</p> <p>PARTN_NUMB</p> <p>Update the CRR entries.</p>
You see the message that you have to specify either address number or address handle.	The PARTN_NUMB field is not given.	<p>In case of creation of RE ORDER in SAP, check for the following fields in their respective structures in native SAP XML.</p> <p>RETURN_PARTNERS:</p> <p>PARTN_NUMB</p> <p>In case of creation of SD ORDER in SAP, check for the following fields in their respective structures in native SAP XML.</p> <p>ORDER_PARTNERS:</p> <p>PARTN_NUMB</p> <p>Update the CRR entries.</p>
You see the message that you have to enter sold-to party or ship-to party.	The PARTN_ROLE field is not given.	<p>In case of creation of RE ORDER in SAP, check for the following fields in their respective structures in native SAP XML.</p> <p>RETURN_PARTNERS:</p> <p>PARTN_ROLE</p> <p>In case of creation of SD ORDER in SAP, check for the following fields in their respective structures in native SAP XML.</p> <p>ORDER_PARTNERS:</p> <p>PARTN_ROLE</p> <p>Update the CRR entries.</p>

Problem	Cause	Resolution
You see the message that the terms of payment are not defined.	The PMNTTRMS field is not given.	<p>In case of creation of RE ORDER in SAP, check for the following fields in their respective structures in native SAP XML.</p> <p>RETURN_HEADER_IN:</p> <p>PMNTTRMS</p> <p>In case of creation of SD ORDER in SAP, check for the following fields in their respective structures in native SAP XML.</p> <p>ORDER_HEADER_IN:</p> <p>PMNTTRMS</p> <p>Check the existing DVMs with the ones provided with the setup.</p>
<p>You see the message that the sales document is not yet complete:</p> <p>Edit Data</p>	<p>The following fields are not given:</p> <p>INCOTERMS1</p> <p>INCOTERMS2</p> <p>PMNTTRMS</p> <p>REQ_QTY</p>	<p>In case of creation of RE ORDER in SAP, check for the following fields in their respective structures/tables in native SAP XML.</p> <p>RETURN-HEADER-IN:</p> <p>PMNTTRMS</p> <p>INCOTERMS1</p> <p>INCOTERMS2.</p> <p>RETURN_SCHEDULES_IN:</p> <p>REQ_QTY.</p> <p>In case of creation of SD ORDER in SAP, check for the following fields in their respective structures/tables in native SAP XML.</p> <p>ORDER-HEADER-IN:</p> <p>PMNTTRMS</p> <p>INCOTERMS1</p> <p>INCOTERMS2.</p> <p>ORDER_SCHEDULES_IN:</p> <p>REQ_QTY</p> <p>Contact the functional person.</p>

Problem	Cause	Resolution
You see the message that the sales organization does not exist.	The SALES_ORG field is not given or is incorrect.	<p>In case of creation of RE ORDER in SAP, check for the following field in their respective structure in native SAP XML.</p> <p>RETURN_HEADER_IN:</p> <p>SALES_ORG</p> <p>In case of creation of SD ORDER in SAP, check for the following field in their respective structure in native SAP XML.</p> <p>ORDER_HEADER_IN:</p> <p>SALES_ORG</p> <p>Update the DVMs.</p>
You see the message that the sales area does not exist.	<p>The following fields are incorrect:</p> <p>SALES_ORG</p> <p>DISTR_CHAN</p> <p>DIVISION</p>	<p>In case of creation of RE ORDER in SAP, check for the following fields in their respective structure in native SAP XML.</p> <p>RETURN_HEADER_IN:</p> <p>SALES_ORG</p> <p>DISTR_CHAN</p> <p>DIVISION</p> <p>In case of creation of SD ORDER in SAP, check for the following fields in their respective structure in native SAP XML.</p> <p>ORDER_HEADER_IN:</p> <p>SALES_ORG</p> <p>DISTR_CHAN</p> <p>DIVISION</p> <p>Update the DVMs.</p>

Problem	Cause	Resolution
You see the message that the condition is missing in pricing procedure.	The COND_TYPE field is not correct.	<p>In case of creation of RE ORDER in SAP, check for the following field in their respective table in native SAP XML.</p> <p>RETURN_CONDITIONS_IN</p> <p>COND_TYPE</p> <p>In case of creation of SD ORDER in SAP, check for the following field in their respective table in native SAP XML.</p> <p>ORDER_CONDITIONS_IN</p> <p>COND_TYPE</p> <p>Check the existing DVMs with the ones provided with the setup.</p>
You see the message that the item number is missing when you changed the schedule line.	The ITM_NUMBER field is missing.	<p>In case of creation of RE ORDER in SAP, check for following field in their respective table in native SAP XML.</p> <p>RETURN_SCHEDULES_IN</p> <p>ITM_Number</p> <p>In case of creation of SD ORDER in SAP, check for following field in their respective table in native SAP XML.</p> <p>ORDER_SCHEDULES_IN</p> <p>ITM_Number</p> <p>Check the existing DVMs with the ones provided with the setup. Update the CRR entries also.</p>

Problem	Cause	Resolution
You see the message that the material is not defined for sales org, distribution channel, and language EN	The MATERIAL field is incorrect.	<p>In case of creation of RE ORDER in SAP, check for the following field in their respective structure in native SAP XML.</p> <p>RETURN_ITEMS_IN:</p> <p>MATERIAL</p> <p>In case of creation of SD ORDER in SAP, check for the following field in their respective structure in native SAP XML.</p> <p>ORDER_ITEMS_IN:</p> <p>MATERIAL</p> <p>Update the CRR entries.</p>
You see the message that the plant is not defined.	The PLANT field is incorrect.	<p>In case of creation of RE ORDER in SAP, check for the following field in their respective structure in native SAP XML.</p> <p>RETURN_ITEMS_IN:</p> <p>PLANT</p> <p>In case of creation of SD ORDER in SAP, check for the following field in their respective structure in native SAP XML.</p> <p>ORDER_ITEMS_IN:</p> <p>PLANT</p> <p>Update the DVMs.</p>

Troubleshooting Inbound RMA Order Creation and Updates in Oracle

The following table lists RMA order problems and resolutions:

Problem	Cause	Resolution
The Error_Msg column in the ANET_INBND table displays a message that the source order ID cannot be decided.	The Order Source column (ANET_OE_HEADERS_IFACE_ALL. ORDER_SOURCE) value is NULL, or the order source was not found for the SOURCE_CODE user-defined parameter.	Check the value in the DataArea /SalesOrder/Header/UserArea /OrderSource tag of the OAG XML document received by the Oracle gateway. If this tag contains a value, the order source should exist in Oracle order sources. If the tag value is NULL, define the order source with the name specified in the user-defined parameters (PARAMETER_NAME = SOURCE_CODE in the ANET_PARAMETERS table).
The Error_Msg column in the ANET_INBND table displays a message that the order type ID isn't found.	The Order Type column (ANET_OE_HEADERS_IFACE_ALL. ANET_ORDER_TYPE) value is NULL.	Check the value in the DataArea /SalesOrder/Header/OrderStatus/ UserArea/OrderType tag of the OAG XML document received by the Oracle gateway. This tag should contain a value.
The Error_Msg column in the ANET_INBND table displays a message about an invalid customer reference.	The Sold To Org ID column (ANET_OE_HEADERS_IFACE_ALL. SOLD_TO_ORG_ID) value is invalid.	The value inserted into SOLD_TO_ORG_ID column of the ANET_OE_HEADERS_IFACE_ALL table is not a valid Oracle customer ID.
The Error_Msg column in the ANET_INBND table displays a message that the customer ID cannot be determined.	The Sold To Org ID column (ANET_OE_HEADERS_IFACE_ALL. SOLD_TO_ORG_ID) value is NULL.	Check the value in the DataArea /SalesOrder/Header/Parties/ UserArea/OriginalSoldToReference tag of the OAG XML document received by the Oracle gateway. This tag should contain a value.
The Error_Msg column in the ANET_INBND table displays a message that the ship-to organization ID is invalid.	The Sold To Org ID column (ANET_OE_HEADERS_IFACE_ALL. SHIP_TO_ORG_ID) value is invalid.	The value inserted into the SHIP_TO_ORG_ID column of the ANET_OE_HEADERS_IFACE_ALL table is not a valid address ID, or that customer does not have a SHIP_TO site defined in Oracle.
The Error_Msg column in the ANET_INBND table displays a message that the ship-to ID cannot be determined.	The Sold To Org ID column (ANET_OE_HEADERS_IFACE_ALL. SHIP_TO_ORG_ID) value is NULL.	Check the value in the DataArea /SalesOrder/Header/Parties/ UserArea /OriginalShipToOrgReference tag of the OAG XML document received by the Oracle gateway. This tag should contain a value.
The Error_Msg column in the ANET_INBND table displays a message about an invalid invoice.	The Invoice To Org ID column (ANET_OE_HEADERS_IFACE_ALL. INVOICE_TO_ORG_ID) value is invalid.	The value inserted into the INVOICE_TO_ORG_ID column of the ANET_OE_HEADERS_IFACE_ALL table is not a valid address ID, or that customer does not have a bill-to site defined in Oracle.

Problem	Cause	Resolution
The Error_Msg column in the ANET_INBND table displays a message that the invoice ID was not found for the header reference.	The Invoice To Org ID column (ANET_OE_HEADERS_IFACE_ALL.INVOICE_TO_ORG_ID) value is invalid.	Check the value in the DataArea /SalesOrder/Header/Parties/ UserArea /OriginalBillToOrgReference tag of the OAG XML document received by the Oracle gateway. This tag should contain a value.
The Error_Msg column in the ANET_INBND table displays a message that the item ID is invalid.	The Organization ID and Inventory Item ID columns (ANET_OE_LINES_IFACE_ALL.ORGANIZATION_ID, ANET_OE_LINES_IFACE_ALL.INVENTORY_ITEM_ID) do not contain a valid organization ID and inventory item ID.	The inventory item does not exist in the specified organization in Oracle.
The Error_Msg column in the ANET_INBND table displays a message about an invalid line type.	The Order Type column (ANET_OE_HEADERS_IFACE_ALL.ANET_ORDER_TYPE) value is NULL, or the line type is not in the concatenated values list.	Check the value in the DataArea /SalesOrder/Header/OrderStatus/ UserArea/OrderType tag of the OAG XML document received by the Oracle gateway. This tag should contain a value.

Troubleshooting Synchronous Messages

The following table lists synchronous message problems and resolutions:

Problem	Cause	Resolution
<p>After clicking the Check Availability link, no details are displayed, or an error is displayed.</p>	<ul style="list-style-type: none"> • The routing to the target application may be incorrect. • Parameters passed to the application programming interface (API) may be incorrect. 	<ul style="list-style-type: none"> • Open the CRMPIPService_conf.xml file. Check the value in Flow model name = SyncFlowModel/Flow Name = RoutingEngine /Routes/Route TouchPoint =ITM01/Targets/TargetID =GWOA1. For this tag, enter the URL of the Oracle gateway. • If the participating application is SAP, TargetID = GWSAP1. For the tag enter the URL of the SAP gateway. • Check the parameters passed to Oracle applications or SAP API by checking the OAG XML document received for that object in the Oracle applications Gateway Console screen or in the SAP Gateway Console screen.
<p>After clicking the Expected Receiving link, no details displayed or an error displayed.</p>	<p>The routing to the target application may be incorrect.</p> <p>Parameters passed to API may be incorrect.</p>	<ul style="list-style-type: none"> • Open CRMPIPService_conf.xml file. Check the value in Flow model name = SyncFlowModel/Flow Name = RoutingEngine /Routes/Route TouchPoint = ITM03/Targets/TargetID = GWSAP1. For this tag, enter the URL of the SAP Gateway. • If the participating application is Oracle applications, TargetID = GWOA1. For the tag, enter the URL of the Oracle gateway. • Check the parameters passed to SAP or Oracle applications API, by checking the OAG XML received for that object in the SAP Gateway console screen or Oracle applications Gateway Console screen.

APPENDIX A

Appendix: Understanding Application Messages and Patches

This appendix discusses application messages and patches.

Application Messages

The following table lists messages for each business object and business process task supported by CRM Process Integration Packs.

Sequence Number	Business Object or Business Process Task	Message Name
1	Item or product	<ul style="list-style-type: none">• ITEM_SYNC• PRODUCT_SYNC• SYNCITEMMASTER
2	Customer	<ul style="list-style-type: none">• CUST_COMPANY_SYNC• CONTACT_SYNC• SYNCPARTY
3	Price list	<ul style="list-style-type: none">• ANET_PRICELIST_SYNC• SYNCPRICELIST
4	Product availability checking	SCM_GET_PROD_AVAIL
5	Sales order propagation	CRM_SALES_ORDER
6	Sales order acknowledgement	SALES_ORDER_ACKNOWLEDGEMENT
7	Sales order update	SALES_ORDER_STATUS
8	Sales order update	CRM_SALES_ORDER_CHANGE
9	Sales order status update	SCM_GET_ORDER_STATUS
10	Advanced shipment notification	<ul style="list-style-type: none">• ADVANCED_SHIPPING_NOTICE• SHOWSHIPMENT

Sequence Number	Business Object or Business Process Task	Message Name
11	360-Degree view View invoices	BI_EIP360_REQ / BI_EIP360_RSP
12	360-Degree view View payments	AR_CRM_REQUEST / AR_CRM_RESPONSE
13	Item availability checking	RF_IN_ITEM_BALANCES
14	Item requisition	PURCHASE_REQUISITION_ LOAD_CRM
15	Expected receiving	RF_GET_POIUT
16	Material, time, and expense propagation	<ul style="list-style-type: none"> • SERVICE_ORDER_SYNC • TIME_SYNC • EXPENSE_SYNC • INVENTORY_ADJUSTMENT
17	Purchase order and interunit receiving	<ul style="list-style-type: none"> • INTERUNIT_RECEIPT • PURCHASE_ORDER_RECEIPT
18	Product availability checking	<ul style="list-style-type: none"> • GET_PROD_AVAILABILITY • RF_IN_ITEM_BALANCES
19	Return materials authorization (RMA) order	<ul style="list-style-type: none"> • RMA_LOAD • PURCHASE_REQUISITION_ LOAD_CRM
20	Installed product creation and updates	<ul style="list-style-type: none"> • ANET_RMA_ASN • SHOWSHIPMENT

Patches

These patches are the minimum requirement to run the integration packs. Please check Customer Connection for the most current PeopleSoft patches. The following table lists application patches for Oracle applications.

Patch Number	Application	Module Name
2211374	Oracle Applications	Purchasing Module, Prerequisite for 2268014.
1786778	Oracle Applications	Purchasing Module, Prerequisite for 2268014.

Patch Number	Application	Module Name
2268014	Oracle Applications	Purchasing Module, Error description::: fact: RCVRCERC - Enter Receipts, symptom: Receive error when saving Inter-Org transfer, symptom: APP-PO-14142: post_query-096, symptom: ORA-01403: no data found.
2177442	Oracle Applications	Prerequisite patches AD minipack 'E' plus patch 2177442 for 2211374 and 1722239, 1656361, 1698831, 1357858 for 1786778 are already applied.
1620087	Oracle Applications	Oracle Order Management only.

The following table lists application patches for SAP.

Patch Number	Application	Module Name
SAPKH36C34	SAP	R/3 Support Package 34 for 4.6C

APPENDIX B

ISO Country and Currency Codes

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

This appendix discusses:

- ISO country codes.
- ISO currency codes.

See Also

“About This PeopleBook,” Typographical Conventions and Visual Cues

ISO Country Codes

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

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

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

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

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

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

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

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

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

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

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

ISO Currency Codes

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

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

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

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

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

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

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

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

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

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

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

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

Glossary of PeopleSoft Terms

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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