PeopleSoft CRM FieldService PeopleBook

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About This PeopleBook

The book provides you with the information that you need to implement and use *PeopleSoft PeopleSoft CRM FieldService*. You can order the online version by requesting SKU *CRMB8R0* or the print version by requesting SKU *CRMr8CFLD-B 0601.*

This section describes information that you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the *PeopleSoft Customer Relationship Management* product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in this book, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating through the system and adding, updating, and deleting information 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.

Because we assume that you already know how to navigate around the PeopleSoft system, much of the information in this book is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information that you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. This book expands on the material covered in PeopleSoft training classes.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (**www.peoplesoft.com**). We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection web site: **http://www.peoplesoft.com/.**

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of 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 delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *Customer Relationship Management* SKU *CRMB8R0*.

Note. Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet	From the main PeopleSoft internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order. PeopleSoft internet site: **http://www.peoplesoft.com/**.
Telephone	Contact Consolidated Publishing Incorporated (CPI) at 800 888 3559.
Email	Email CPI at callcenter@conpub.com.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font`	Indicates a code example.
Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold).
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0,* not the letter *O.*
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Cross-references	The phrase "For more information" indicates where you can find additional documentation on the topic at hand.

- Capitalized titles in *italics* indicate the title of another PeopleBook. For example: For more information about billing, see *PeopleSoft 8 Billing PeopleBook.*
- Capitalized titles in *italics* followed by chapter title in quotes refer to a chapter in another PeopleBook. For example: For more information about establishing rate templates, see *PeopleSoft 8 Projects PeopleBook,* "Integrating With PeopleSoft Billing and PeopleSoft Contracts."
- Capitalized titles in quotes refer to another chapter of this PeopleBook. For example: For more information about contract status security, see "Securing Your PeopleSoft Contracts System."
- Capitalized titles refer to sections within this chapter of this PeopleBook. For example: For more information about Defining Contract Statuses, see Defining Your Own Contract Statuses.

Note. Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Text in this bar indicates **For more information** cross-references to related or additional information.

Warning! Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Page and Panel Introductory Table

In the documentation, each page or panel description in the application includes an introductory table with pertinent information about the page. Not all of the information will be available for all pages or panels.

Usage	Describes how you would use the page, panel, or process.
Object Name	Gives the system name of the page, panel, or process as specified in PeopleTools Application Designer. For example, the Object Name of the Detail Calendar page is DETAIL_CALENDAR1.
Navigation	Provides the path for accessing the page, panel, or process.
Prerequisites	Specifies which objects must have been defined before you use the page, panel, or process.
Access Requirements	Specifies the keys and other information necessary to access the page or panel. For example, **SetID** and **Calendar ID** are required to open the Detail Calendar page.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed, about our documentation, 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 comments by email to the authors of PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

PeopleSoft CRM FieldService PeopleBook

This book provides information about setting up and using the functions offered by PeopleSoft CRM FieldService.

Note. See the *PeopleSoft CRM Application Fundamentals PeopleBook* for information about setting up and using the common application elements for the products that make up the PeopleSoft 8 CRM group of applications. The *PeopleSoft CRM Application Fundamentals PeopleBook* for includes information about customers, workers, products, agreements, solutions, and other common PeopleSoft CRM objects.

This section describes the chapters in this book.

PART: Setup Data

Defining Business Units in PeopleSoft CRM FieldService describes how field service business units are used in your system and document the fields on the FieldService Definition page.

Defining Inventory Storage Locations for Technicians explains how to associate the field service technicians in your workforce with storage locations in your inventory system that represent their good and defective truck stock.

Setting Up Your Services describes the data model for service records, defines the procedure for creating and updating service records, and documents the pages used for this procedure.

PART: Service Order Management

Creating and Managing Service Orders details the service order data model, service order status values, workflow notifications available for service orders, and the pages of the Service Order component.

Managing Service Order Material Requirements describes the process flow of material management transactions initiated from the Manage Material component, detail the prerequisites setup steps for the component's functionality, and document the fields on each page of the component.

Tracking Expenses Associated With a Service Order details how you can log expenses associated with performing the work for each service order line using the Manage Expenses component.

Working With My Service Orders explains the functionality of the My Service Order component, which enables technicians to work with a streamlined version of the service orders that they have been assigned.

Working With the Dispatch Board explains the setup requirements and functionality of the dispatch board, which offers a graphical representation of the task assignments for technicians.

PART: PeopleSoft Product Integration

Integrating With PeopleSoft Applications highlights requirements, provides recommendations, and describes points to consider when implementing Peoplesoft CRM FieldService with applications in the PeopleSoft Supply Chain Management and Peoplesoft HRMS product lines.

PART: Reports

Running PeopleSoft CRM FieldService Reports describes the reports that you can generate for PeopleSoft CRM FieldService.

CHAPTER 2

Defining Business Units in PeopleSoft CRM FieldService

To implement PeopleSoft CRM FieldService, you must map your field service organization to field service business units in your system using the FieldService Definition page.

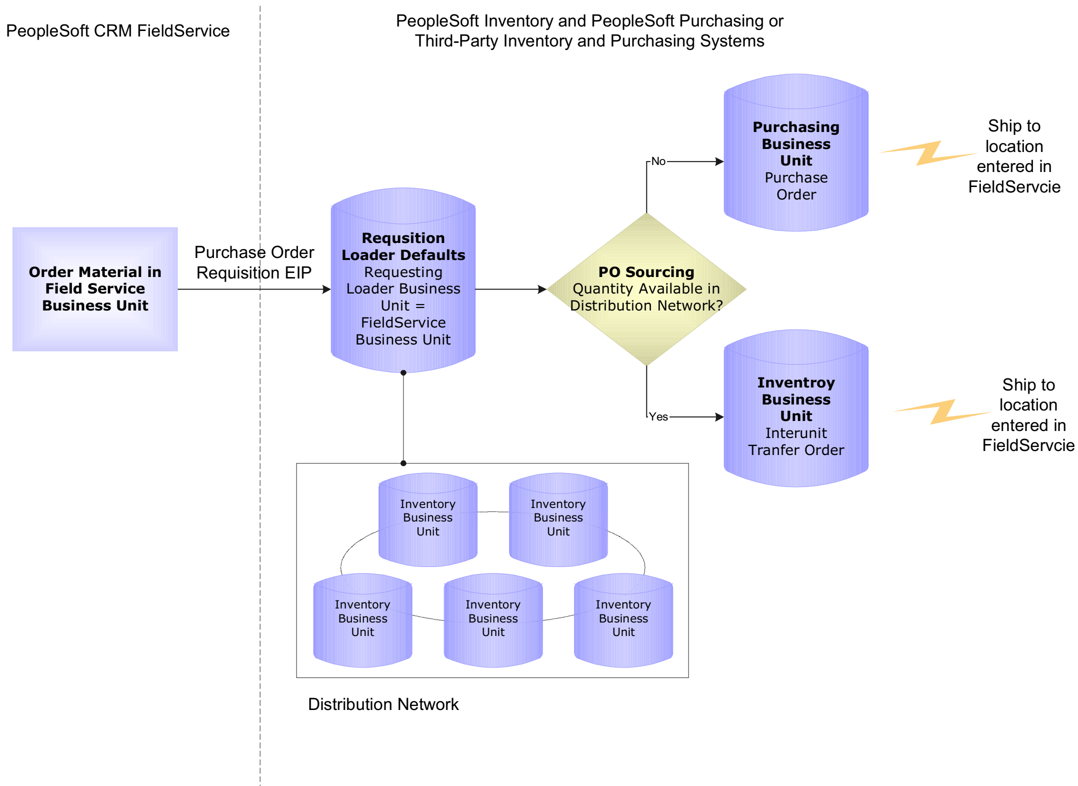
The following sections describe how field service business units are used in your system and document the fields on the FieldService Definition page.

Understanding Field Service Business Units

In PeopleSoft CRM, field service business units are used to track service orders created by each of your field service organizations. The field service business unit ID also serves as a reference key when integrating with PeopleSoft Purchasing and PeopleSoft Inventory. If you're integrating with PeopleSoft Purchasing to create requisitions for truck stock, you must define each field service business unit as a valid source of requisitions in PeopleSoft Supply Chain Management. Using the Requisition Loader Defaults component in PeopleSoft Supply Chain Management, you define each field service business unit as a Loader BU and establish processing defaults for requisitions staged by the field service business unit, including the purchasing business unit in PeopleSoft Purchasing that will process the requisitions.

When defining procurement options in PeopleSoft Supply Chain Management, you can associated the field service business unit with an appropriate distribution network on the Ship To Locations page. Sourcing processes in PeopleSoft Purchasing can be configured to check available quantity first in the distribution network before creating a purchase order with an external vendor. If quantity exists in one of the inventory business units in the defined distribution network, an interunit transfer is created to fulfill the requisition.

The following diagram illustrates the relationship between a field service business unit in PeopleSoft CRM and your inventory and purchasing system.



Orders initiated in a field service business unit are sent to your purchasing system for sourcing.

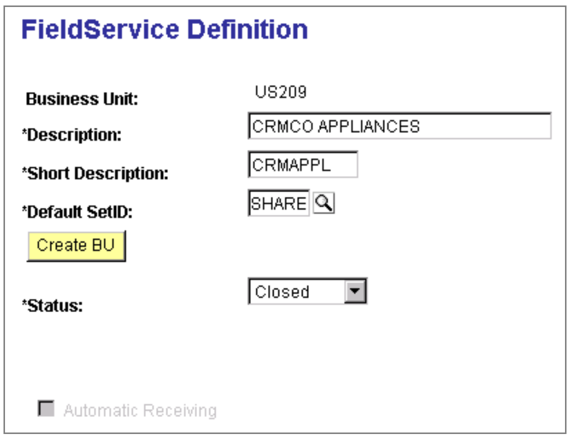
For more information about distribution networks, see the *PeopleSoft Applications Fundamentals for FSCM PeopleBook.* **For more information** about requisitions, sourcing processes, distribution networks, and purchase orders in PeopleSoft Purchasing, see the *PeopleSoft Purchasing PeopleBook.* **For more information** about interunit transfers in PeopleSoft Inventory, see the *PeopleSoft Inventory PeopleBook.*

For integration purposes, business unit definition records must be synchronized across all systems. Business unit definitions created in PeopleSoft CRM must be available in PeopleSoft Purchasing and your inventory business unit definitions must be available in PeopleSoft CRM. To synchronize business unit records across your enterprise, use the Business Unit EIP (enterprise integration point).

For more information about the Business Unit EIP, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook.* **For more information** about considerations and recommendations for implementations of PeopleSoft CRM FieldService that include PeopleSoft Purchasing or PeopleSoft Inventory, see Integrating With PeopleSoft Applications.

FieldService Definition Page

Usage	Use the FieldService Definition page to define the business units that correspond to your field service organizations.
Object Name	BUS_UNIT_RF1
Navigation	**Define Business Rules, Establish Business Units, Use, FieldService Definition**
Access Requirements	Enter a business unit ID. **Note.** For best performance, we recommend that your business unit IDs be exactly five alphanumeric characters.



FieldService Definition page

The system displays the **Business Unit** ID that you entered to access the page.

Note. If your company uses more than one PeopleSoft application and defines the same business units across applications, ensure that you use the same name for business units designed to share the same setID.

Description The long description of the business unit. When you add a business unit, you can enter a long description using up to 30 alphanumeric characters.

Short Description The short description of the business unit. When you add a business unit, you can enter a short description using up to 10 alphanumeric characters.

Default SetID

The setID that determines your preliminary tableset sharing setup. The system displays this field when you open the page in Add mode. The setID that you select determines your preliminary tableset sharing setup by determining the setIDs assigned to each record group for the new business unit. The setID assigned to a record group determines which tableset is used as valid values for that specific business unit. If you enter a value that is equal to an existing business unit, it uses the set control definition of that business unit and copies it to the new business unit.

For more information about setIDs and tableset controls, see Planning Records, Control Tables, and TableSets in the *PeopleTools PeopleBook.*

Create BU (create business unit)

Click this button to establish the setID controls for the field service business unit based on the **Default SetID** that you specify.

Note. You must click the **Create BU** button before you can specify the **Status** or select the **Automatic Receiving** option.

Status

Indicates whether the facility represented by the business unit is ***Open*** or ***Closed.*** No transactions can be processed for a ***Closed*** business unit.

Automatic Receiving

Indicates whether orders placed using the Manage Material page can be received automatically when material usage is recorded or if technicians must record receipt of the order shipment before they can record material usage. By default, automatic receiving is disabled. This setting applies to all material requisitions created for the field service business unit.

For more information about material management activities in PeopleSoft CRM FieldService, see the Managing Service Order Material Requirements chapter.

CHAPTER 3

Defining Inventory Storage Locations for Technicians

In PeopleSoft CRM, you associate the field service technicians in your workforce with storage locations in your inventory system that represent their good and defective truck stock on the Storage Locations page of the Worker component.

The following section explains how truck stock storage locations are set up.

For more information about the fields on the Storage Location page of the Worker component, see Managing Workers in the *PeopleSoft CRM Application Fundamentals PeopleBook*.

Understanding Truck Stock Storage Locations

When you record receipt, usage, and removal of item quantity for a service order line on the Manage Material page, the PeopleSoft CRM system publishes transaction messages to update the storage locations in your inventory system that have been associated with the lead technician on the service order line. From the Manage Material component, you can also view stock balances for the good truck stock storage locations that have been associated with each member of the provider group assigned to the service order.

For more information about material movement transactions for service orders, see the Managing Service Order Material Requirements chapter.

To support this functionality, each technician in your workforce must be associated with two storage locations in your inventory system—one location for good stock that can be used to complete work on a service order line and another location for defective stock that was removed from customers' sites. The stock removed from a customer's site may not necessarily be defective. Typically, however, stock removed from a customer's site must undergo inspection processing before it can be included in your available stock stores.

Before you can associate technicians with truck stock storage locations in PeopleSoft CRM, an inventory business unit and its material storage locations must be defined in PeopleSoft Inventory or your third-party inventory system.

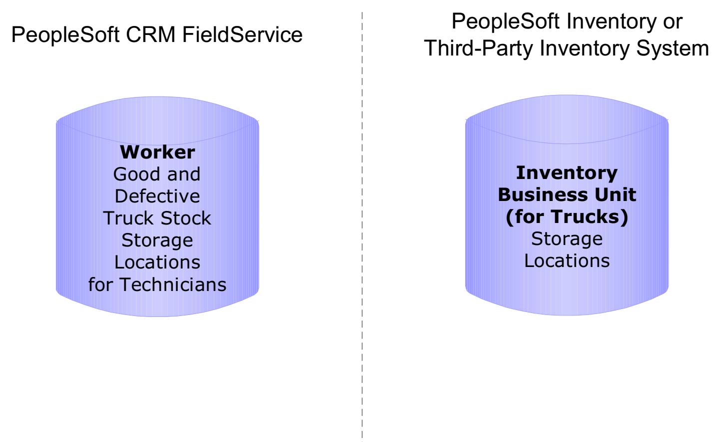
If you are integrating with PeopleSoft Inventory, we recommend that you define an inventory business unit to track only truck stock storage locations. The records of the business units in your inventory system that represent your field service trucks must also be available in your

PeopleSoft CRM system. Activate the Business Unit EIP (enterprise integration point) to automatically insert business units defined in your inventory system in the BUSINESS_UNIT_FS table in PeopleSoft CRM. This enables you to reference the appropriate inventory business unit for the technician's storage locations on the Storage Location page.

Note. When PeopleSoft CRM is integrated with PeopleSoft Supply Chain Management, the BUSINESS_UNIT_FS table in PeopleSoft CRM contains all business units defined in PeopleSoft Supply Chain Management, including all inventory business units defined in PeopleSoft Inventory. On the Storage Location page, select the appropriate inventory business unit.

For more information about the Business Unit EIP, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook.*

As the following diagram illustrates, the good and defective storage locations are manually defined in two systems. For material movement transactions initiated from the Manage Material page to be successfully recorded in your inventory system, the technician's truck stock storage location definition—the area and up to four storage levels—must define a valid storage location definition for the inventory business unit in your inventory system.



The definitions of the good and defective storage locations associated with a technician in PeopleSoft CRM must match valid storage location definitions in your inventory system.

For more information about defining storage locations in PeopleSoft Inventory, see the *PeopleSoft Inventory PeopleBook.* **For more information** about considerations and recommendations for implementations of PeopleSoft CRM FieldService that include PeopleSoft Inventory, see the Integrating With PeopleSoft Applications chapter.

Your business processes dictate how material in a technician's defective storage location should be handled. Typically, this stock is transferred to an inspection storage location within a distribution center where a decision is made to scrap, recycle, repair, or restock the item in your inventory stores.

CHAPTER 4

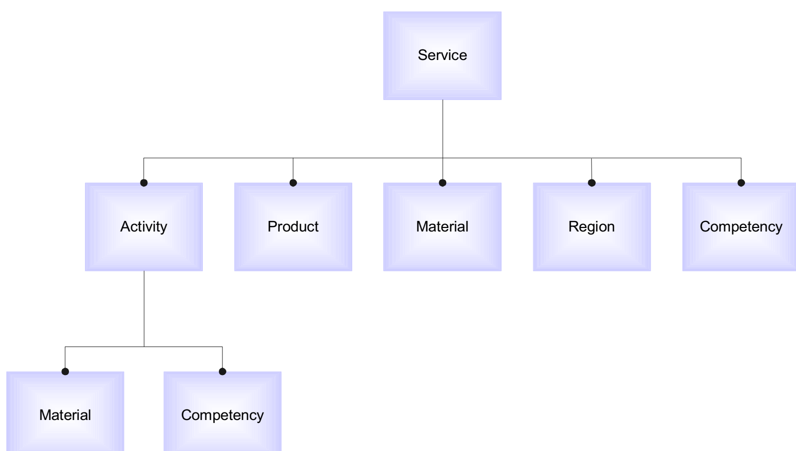
Setting Up Your Services

Every field service organization performs services for their customers. In PeopleSoft CRM FieldService, you create a service record for each of the services you offer using the Service component. Once a service has been defined in your system, you can define how it will be priced, include it on an agreement line, and enter service orders to track customer requests for it.

The next sections describe the data model for service records, define the procedure for creating and updating service records, and document the pages used in this procedure.

Understanding the Service Data Model

The next diagram illustrates the component records of a service definition in PeopleSoft CRM FieldService:



Service Data Model

When you define a service in your system, you can define the following information:

- *Service activities.* Service activities are steps required to complete the service. Service activities are not a required part of the service definition. However, defining your services as a collection of activities enables you to manage requests for the service at a more granular level. On a service order, customer service representatives and technicians can add or delete activities defined for the service on the service order to meet the specific needs of the customer. When a service is requested on a service order, the system automatically creates service order lines for any activities defined for the service. The service order lines can be modified or deleted as necessary.

Note. If you define service activities, you must also define material and technician competency requirements for the activity. The system does not retrieve material and technician competency requirements from the service level, if activities have been defined for the service.

- *Products.* You can define the products covered by the service. You can indicate that the service applies to all products in your system or you can define a subset of products for which the service is applicable. When you specify the service on an agreement line, the system verifies that only the products defined for the service can be listed as products under service on the agreement line. Similarly, when the service is requested on a service order, the system validates that only the products defined for the service are specified on the service order.

For more information about defining products in your system, see Setting Up Products in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

- *Materials*. You can define required quantities of the items defined in your system that are required to perform the service or the service activity. If service activities are defined, the system uses the service activity material information to populate the required material list associated with the service order line on the Manage Material page. If there are no service activities, the system uses the material information at the service level to populate the required material list associated with the service order lines. From the Manage Material page, you can add additional items and order required materials as necessary.

For more information about item definition, see Defining Items in the *PeopleSoft CRM Application Fundamentals PeopleBook.* **For more information** about the Manage Material page, see the Managing Service Order Material Requirements chapter.

- *Regions.* You can define the geographic regions in which the service can be sold and deployed. You can indicate that the service can be sold and deployed in all regions defined for your system or you can define a subset of regions for which the service can be sold or deployed. When you specify the service on an agreement line, the system verifies that the customer has a region defined as a salable region for the service. Similarly, when the service is requested on a service order, the system validates that only the region derived from the customer information on the service order is defined as a deployable region for the service.

For more information about region definition, see Setting General Options in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

- *Competencies.* You can specify a minimum level of proficiency for the technicians that the system suggests for service order line assignment. The minimum competency can be specified at the service level or the service activity level if activities are defined. When you click the Suggest Technician link on the Service Order page, the system will calculate a lower fit score for any technician that does not meet or exceed the competency level specified for the service activity or for the service.

For more information about defining competencies for your system and recording a technician's competency level, see Managing Workforce Competencies in the *PeopleSoft CRM Application Fundamentals PeopleBook*. **For more information** about how the system suggests technicians for assignment, see Setting Up and Performing Task Assignment Searches in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Defining and Maintaining Services and Service Activities

As indicated by the data model in the previous section, service definitions reference data that should exist in your system prior to defining services, such as products, items, regions, and competencies. Once these elements are in place, you must start the service definition procedure by defining control information for services and service activities.

To define services:

1. Establish the codes used to categorize your services on the Service Types page (optional).

   A service type code references the general category that a service belongs to. You can create service types to categorize, for example, delivery services, installation services, preventative maintenance services, and so forth. Service types are not used by the system; however, you may want to develop reports based on service types for your own informational purposes. Once defined, an appropriate service type code can be referenced for the service on the Service page.

2. Establish the codes used to categorize service activities on the Activity Types page.

   Similar to service type codes, service activity type codes reference the general category that a service activity belongs to. For a particular product service area, you may want to define categories of related service activities. For example, a home appliance company may choose to define several categories of service activities for refrigerator services, such as activities related to refrigerator repair and activities related to refrigerator preventative maintenance. Activity types are required for service activity definitions. However, if you do not define activities for your services, you do not need to define activity types.

3. Define the activities that comprise your services on the Service Activity Codes page.

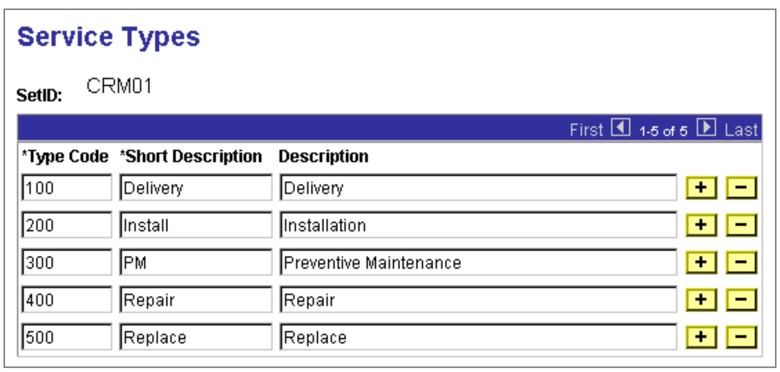
   Activity definition is optional—you can define services without activities. However, defining your services as a series of default activity steps provides the flexibility to manage technician competency and material requirements for each step of the service. It also enables the customer service representative or technician to tailor a service to the needs of the customer by adding or deleting activities for the service on the service order. In addition, activity codes can be attached to multiple service definitions, which reduces data entry requirements.

4. Define the services offered by your organization using the Service component.

   Using the pages of the Service component, you establish the name of the service, define when and under what circumstances the service is available, define material, competency, region, and product information for the service, define the activities that comprise the service, and record any notes and attachments pertaining to the service. You can add new services or update existing service definitions with this component.

Service Types Page

Usage	Use the Service Types page to establish codes that can be used to categorize your services. For informational purposes, you can develop reports based on these service categories.
Object Name	RF_SERVICE_TYPE
Navigation	**Define Business Rules, Structure FieldService, Use, Service Types**
Access Requirements	Enter a setID.



Service Types page

The system displays the **SetID** that you entered to access the page.

In the grid, the system displays the service types that have been defined for the setID.

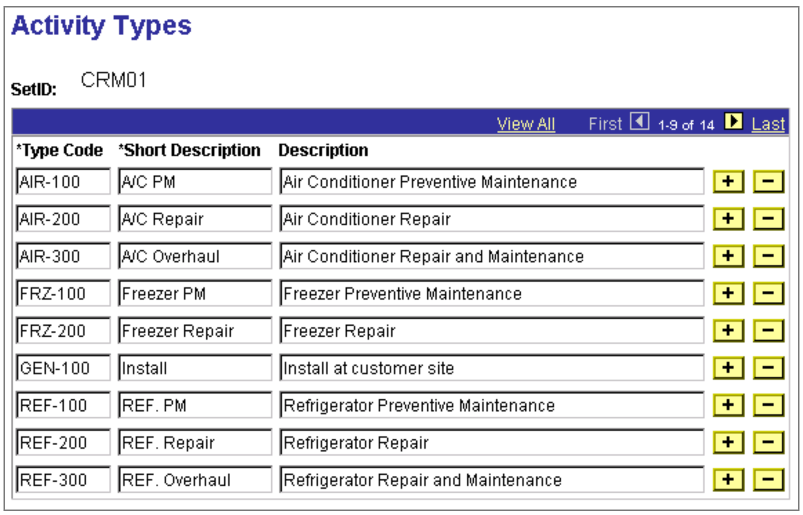
Type Code — The code that identifies the service in your system. When defining a new service type, you can enter a code using up to 8 alphanumeric characters.

Short Description — The short description associated with the service type. When defining a new service type, you can enter a short description using up to 15 alphanumeric characters.

Description — The long description associated with the service type. When defining a new service type, you can enter a long description using up to 40 alphanumeric characters.

Activity Types Page

Usage	Use the Activity Types page to establish codes that can be used to categorize your service activities. For informational purposes, you can develop reports based on these activity categories.
Object Name	RF_SVC_ACT_TYPE
Navigation	**Define Business Rules, Structure FieldService, Use, Activity Types**
Access Requirements	Enter a setID.


Activity Types

SetID: CRM01

View All First 1-9 of 14 Last

*Type Code	*Short Description	Description
AIR-100	A/C PM	Air Conditioner Preventive Maintenance
AIR-200	A/C Repair	Air Conditioner Repair
AIR-300	A/C Overhaul	Air Conditioner Repair and Maintenance
FRZ-100	Freezer PM	Freezer Preventive Maintenance
FRZ-200	Freezer Repair	Freezer Repair
GEN-100	Install	Install at customer site
REF-100	REF. PM	Refrigerator Preventive Maintenance
REF-200	REF. Repair	Refrigerator Repair
REF-300	REF. Overhaul	Refrigerator Repair and Maintenance

Activity Types page

The system displays the **SetID** that you entered to access the page.

In the grid, the system displays the service activity types that have been defined for the setID.

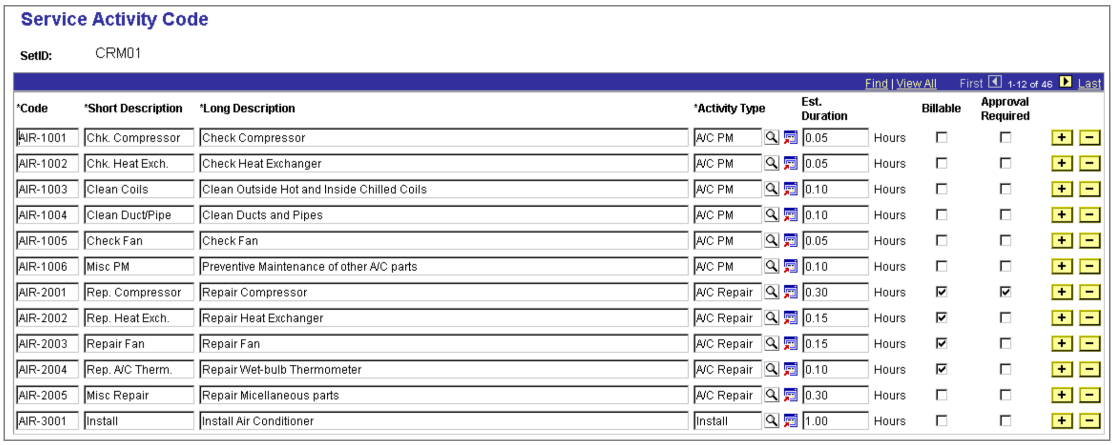
Type Code The code that identifies the activity type in your system. When defining a new activity type, you can enter a code using up to 8 alphanumeric characters.

Short Description The short description associated with the activity type. When defining a new activity type, you can enter a short description using up to 15 alphanumeric characters.

Description The long description associated with the activity type. When defining a new activity type, you can enter a long description using up to 40 alphanumeric characters.

Service Activity Code Page

Usage	Use the Service Activity Code page to define the activities that your services will comprise. The values defined on this page become the default values on the Service Activity page of the Service component, which is documented later in this chapter.
Object Name	RF_ACT_CODE
Navigation	**Define Business Rules, Structure FieldService, Use, Activity Codes**
Access Requirements	Enter a setID.



Service Activity Code

SetID: CRM01

Find | View All First 1-12 of 46 Last

*Code	*Short Description	*Long Description	*Activity Type	Est. Duration		Billable	Approval Required
AIR-1001	Chk. Compressor	Check Compressor	A/C PM	0.05	Hours	☐	☐
AIR-1002	Chk. Heat Exch.	Check Heat Exchanger	A/C PM	0.05	Hours	☐	☐
AIR-1003	Clean Coils	Clean Outside Hot and Inside Chilled Coils	A/C PM	0.10	Hours	☐	☐
AIR-1004	Clean Duct/Pipe	Clean Ducts and Pipes	A/C PM	0.10	Hours	☐	☐
AIR-1005	Check Fan	Check Fan	A/C PM	0.05	Hours	☐	☐
AIR-1006	Misc PM	Preventive Maintenance of other A/C parts	A/C PM	0.10	Hours	☐	☐
AIR-2001	Rep. Compressor	Repair Compressor	A/C Repair	0.30	Hours	☑	☑
AIR-2002	Rep. Heat Exch.	Repair Heat Exchanger	A/C Repair	0.15	Hours	☑	☐
AIR-2003	Repair Fan	Repair Fan	A/C Repair	0.15	Hours	☑	☐
AIR-2004	Rep. A/C Therm.	Repair Wet-bulb Thermometer	A/C Repair	0.10	Hours	☑	☐
AIR-2005	Misc Repair	Repair Micellaneous parts	A/C Repair	0.30	Hours	☐	☐
AIR-3001	Install	Install Air Conditioner	Install	1.00	Hours	☐	☐

Service Activity Code page

The system displays the **SetID** that you entered to access the page.

In the grid, the system displays the service activity codes that have been defined for the setID.

Code The identification of the service activity in your system. When defining a new service activity, you can enter a code using up to 8 alphanumeric characters.

Short Description The short description associated with the service activity. When defining a new service activity, you can enter a short description using up to 15 alphanumeric characters.

Long Description The long description associated with the service activity. When defining a new service activity, you can enter a long description using up to 80 alphanumeric characters.

Note. Service activity long descriptions display on system prompts when a user is selecting a service activity on the Service component and the Service Order component. Enter a description that will be meaningful to people using these components.

Activity Type The category of activity that the service activity represents. When defining a new service activity, you can associate the service activity with an activity type for informational purposes. Activity types must first be established on the Activity Types page. To access the Activity Types page, click the transfer button. The Activity Types page is documented earlier in this chapter.

Est. Duration (estimated duration) The estimated time in hours required to perform the activity. The system uses this value as the default value for estimated duration on service order lines for this activity. You can change the estimated duration for specific service order lines as necessary.

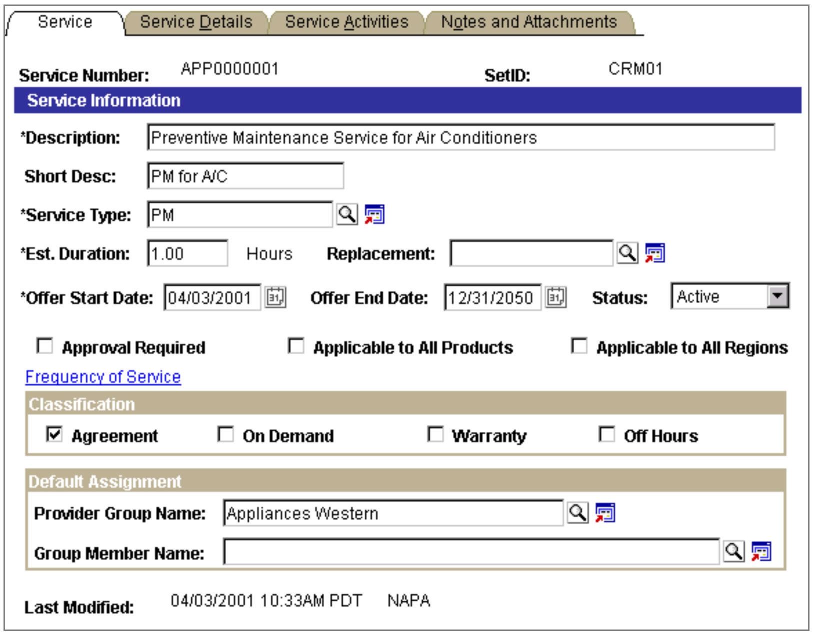
Billable Indicates whether some portion of the time, materials, and expenses associated with the activity can be billed to the customer when the activity is included on a service order line. The system populates the service order lines with the setting indicated by this check box. You can change the setting for specific service order lines as necessary.

Approval Required Indicates that when the activity is specified for a service order line, the service order line must be manually approved before time, expense, and material management transactions can be entered. The system populates the service order lines with the setting indicated by this check box. If approval processing is not defined for the service, you can change the approval setting on the service order line to require approval processing. However, if approval processing is required for the service, it will also be required on the service order line. You cannot change the approval setting on the service order line when the service specifies approval processing.

Service Page

Usage	Use the Service page to define information for the service header.
Object Name	RF_SERVICE
Navigation	**Define Business Rules, Structure FieldService, Use, Service**

Access Requirements	Enter a setID and service number. You can enter *Next* as the service number if automatic numbering for services has been enabled. **For more information** about automatic numbering, see Using Automatic Numbering in the *PeopleSoft CRM Application Fundamentals PeopleBook.*



Service page

The system displays the **SetID** and **Service Number** that you entered to access the page.

Service Information

The fields under **Service Information** define the service offering.

Description

The long description of the service. When you define a new service, you can enter a long description of the service using up to 80 alphanumeric characters.

Note. Service descriptions display on system prompts when a user is selecting a service on the Agreement component and the Service Order component. Enter a description that will be meaningful to people using these components.

Short Desc (short description)

The short description of the service. When you define a new service, you can enter a short description of the service using up to 15 alphanumeric characters.

Service Type	The category of service. Service types must first be established on the Service Types page, which is documented earlier in this chapter. Click the transfer button to access the Service Types page.
Est. Duration (estimated duration)	The estimated amount of time in hours required to perform the service. When this page is saved, the system issues a warning if this value is less than the sum of the estimated duration times for each associated activity defined on the Service Activity Code page, which is documented earlier in this chapter.
Replacement	The service scheduled to replace this service when this service is no longer offered. When a replacement service is specified, the system sets the status of the original service to *Inactive*, which prevents the service from being selected on agreements and service orders.
Offer Start Date	The first date that the service can be offered on agreements and on-demand service orders. Prior to this date, the service is not available on system prompts for agreements or on-demand service orders.
Offer End Date	The last date that the service can be offered on agreements and on-demand service orders. After this date, the service is not available on system prompts for agreements or on-demand service orders.
Status	The current status of the service definition. ***Active:*** Select this option to make the service available in your system during the time period specified by the offer start and end dates. ***Inactive:*** Select this option to make the service unavailable in your system, regardless of the offer start and end dates. An inactive service does not appear as an option on system prompts for service orders or agreements.
Approval Required	Indicates whether service orders that specify this service will require approval by a designated person in your company before the service can be performed for the customer. The system automatically populates the service order header with this setting. If approval is required at the service order header level, no service order line can be approved until the header is approved.

Note. You can also require approval for activities on a service order. However, the Approval Required check box on the service order header and the Approval Required check box on the service order activity operate independently.

Applicable to All Products Indicates whether the service can be performed for all of your products. To limit the service to specific products, clear this check box and define the applicable products for this service on the Service Details page of this component.

Applicable to Regions Indicates whether the service can be performed in all regions. To limit the service to specific regions, clear this check box and define the applicable regions for this service on the Service Details page of this component.

Note. When you select the **Applicable to Regions** check box, the system assumes that the service is saleable and deployable in all regions.

Frequency of Service Click this link to access the Frequency of Service page, where you can define the frequency offered for this service for informational purposes. The Frequency of Service page is documented later in this chapter.

Classification

The **Classification** group box indicates how the service can be offered to customers.

Agreement Indicates whether the service can be offered to customers on agreements. If this check box is not selected, the service does not appear as an option on system prompts for agreements.

On Demand Indicates whether the service can be offered to customers on demand. For a service order not covered by a warranty or an agreement, the system validates that the service is available on demand when the service order is saved.

Warranty Indicates whether the service can be provided under warranty. This field is provided for informational purposes only. The system does not validate whether a service can be provided for products under warranty on service orders.

For more information about warranties, see Setting Up and Managing Agreements and Warranties in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Off Hours Indicates whether the service can be provided outside of your standard hours of operation for informational purposes only.

Default Assignment

The **Default Assignment** group box enables you to define a preferred provider group and group member to perform the service. If a service order is not covered by an agreement or if the selected agreement does not have a provider group or group member assigned, the system uses the default assignment values to populate the service order header, where they can be changed if necessary.

Provider Group Name The name of the provider group that the system will assign to service order lines requesting this service by default. The system first populates the service order header with this value. The system populates the service order lines using the values defined at the service order header level. You can override the default provider group value at either the service order header or the service order line level, if necessary.

Group Member Name The name of the provider group member that the system will assign to service order lines requesting this service. The system populates the service order lines using the values defined at the service order header level. You can override the default group member value at either the service order header or the service order line level, if necessary. To establish a new provider group member, click the transfer button to access the Group Member page.

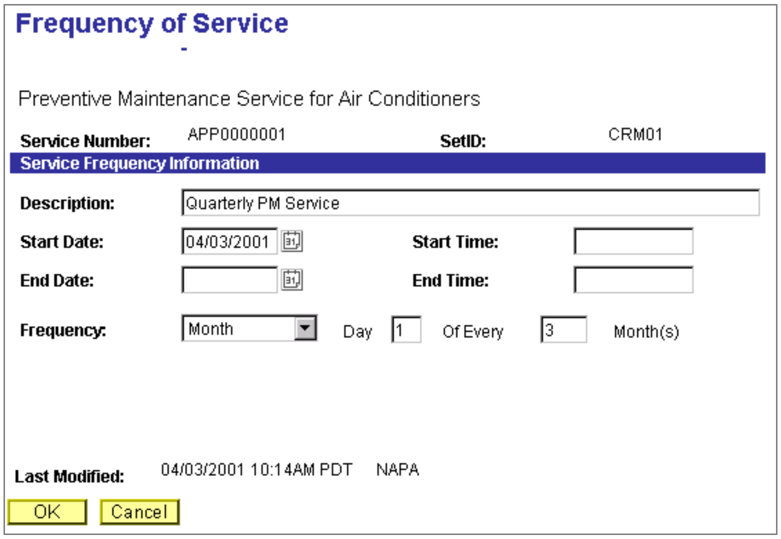
For more information about provider group and group member definition, see Setting Up and Maintaining Provider Groups and Group Members in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

The **Last Modified** field displays a time stamp showing when the service definition record was last updated and the name of the person who made the change.

Frequency of Service Page

Usage	Use the Frequency of Service page to define for informational purposes how often a service should be performed. You can use this information to schedule, for example, preventative maintenance service orders for customers with agreements that include this type of service.
Object Name	RF_SERVICE_FREQ1
Navigation	**Define Business Rules, Structure FieldService, Use, Service**

Access Requirements	Click the Frequency of Service link on the Service page of the Service component, which is documented earlier in this chapter.



Frequency of Service page

The system displays the service activity name, **Service Number,** and the **SetID** of the service.

Service Frequency Information

For informational purposes, the fields under **Service Frequency Information** define how often a service should be performed.

Description	A description of the service frequency. When you define a new service, you can enter a description of the service frequency using up to 80 alphanumeric characters.
Start Date	The beginning date of the period for which service frequency is defined. The system displays the offer start date defined for the service on the Service page.
Start Time	The beginning time of the period for which service frequency is defined. The time zone displayed for this value represents the time zone of the database server.
End Date	The end date of the period for which service frequency is defined. A blank value indicates an unlimited frequency period.
End Time	The end time of the period for which service frequency is defined. The time zone displayed for this value represents the time zone of the database server.
Frequency	A combination of values that specify how often the service should be preformed.

Month: If you select a monthly service frequency, define the day of the month on which the service should be scheduled and the duration of this frequency in number of months.

Day: If you select a daily service frequency, define the duration of this frequency in number of days.

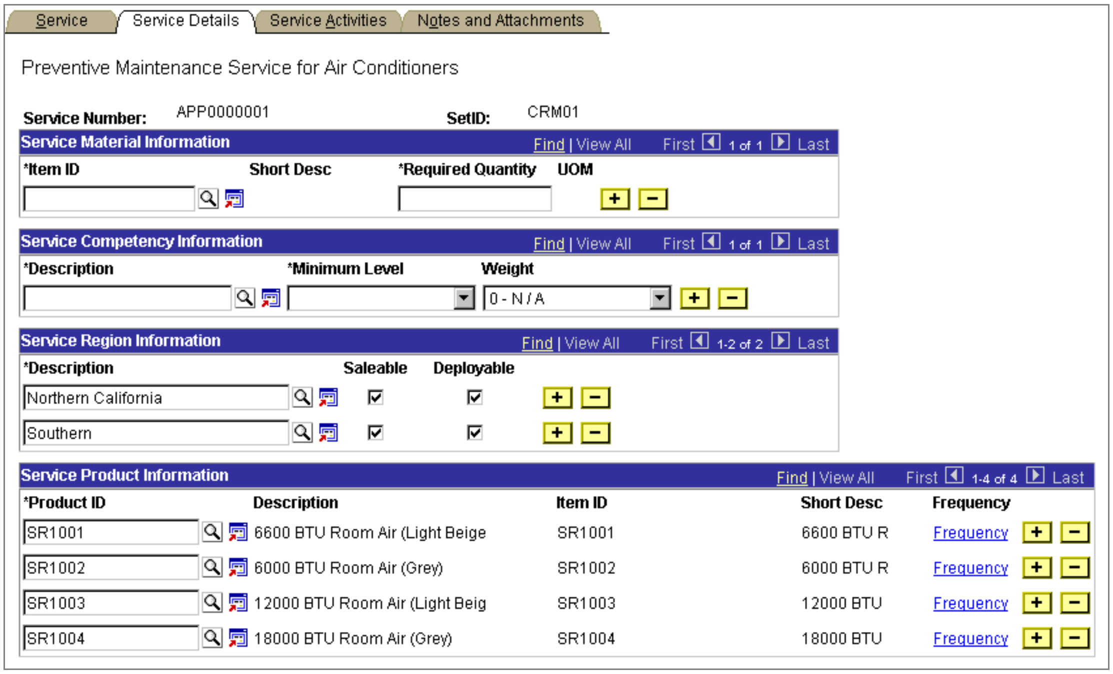
Week: If you select a weekly service frequency, define the duration of this frequency in number of weeks and specify the day or days of the week on which to perform the service.

Year: If you select a yearly service frequency, define the month and the day of the month to perform the service.

The **Last Modified** field displays a time stamp showing when the frequency record was last updated and the name of the person who made the change.

Service Details Page

Usage	Use the Service Details page to define materials, regions, products, and competencies associated with the service.
Object Name	RF_SERVICE_ATTRIB
Navigation	**Define Business Rules, Structure FieldService, Use, Service**
Access Requirements	Select the Service Details tab.



Service Details page

The system displays the service description, the **Service Number** of the service, and the **SetID.**

Service Material Information

The **Service Material Information** grid captures information about the items used to perform the service. When a service order is created for this service, if there are no activities, the system uses the service material information to populate the material list associated with the service order. From the Manage Material component, you add additional items and order the required materials as necessary.

Note. The system does not retrieve the service material information, if activities have been defined for the service. If you define service activities, define service activity material information on the Service Activity page.

For more information about the Manage Material component, see the Managing Service Order Material Requirements chapter.

Item ID	The ID of the item used to perform the service. Before you can add an item to the service, the item must first be established in your system tables either by using an EIP application message or the Item Definition component and the item must have a status of *Active*. Click the transfer button to access the Item Definition component.

For more information about item definition, see Defining Items in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Short Desc (short description)
The short description associated with the item definition.

Required Quantity
The minimum amount of the item that the technician needs to perform the service. The system uses this value to populate the quantity required on the Manage Material page.

For more information about the Manage Material component, see the Managing Service Order Material Requirements chapter.

UOM (unit of measure)
The standard unit of measure for the item quantity.

Service Competency Information

The **Service Competency Information** grid displays the competency requirements that the assigned technician needs to perform the service. If there are no activities defined for the service, this information is used by the system to find the best technician to assign to the service order.

For more information about how competency information is set up and used by the system, see Managing Workforce Competencies in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Description
The description of the competency required to perform the service. Competencies must first be established on the Competencies page under the General Options menu.

For more information about the Competencies page, see Managing Workforce Competencies in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Minimum Level
The minimum level of competency that the assigned technician must have to perform the service. The available options depend on the competency rating model defined for the selected competency. When searching for technicians to assign to service orders, the system calculates higher fit scores for those technicians who meet or exceed the minimum level of competency defined for the service.

For more information about how competencies are used in task assignment searches, see Setting Up and Performing Task Assignment Searches in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Weight

The relative importance of this competency. Each activity competency can have a value from ***0*** to **5,** where ***5*** represents the highest level of importance. A weight of ***0*** indicates that the competency is not included in the assignment search.

Service Region Information

The **Service Region Information** grid displays the regions in which the service is offered. If you select the Applicable to All Regions check box on the Service page, the system does not display this grid.

Name

The name of the region. Regions must first be established on the Region page. Only regions with an *Active* status can be selected.

For more information about the Region page, see Setting General Options in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Saleable

Indicates whether the service can be sold in the region. When you select the service on an agreement, the system validates that the customer or customer site corresponds to a saleable region.

Deployable

Indicates whether the service can be provided in the region. When you select the service on an agreement, the system validates that the customer or customer site corresponds to a deployable region.

Service Product Information

The **Service Product Information** grid displays the products to which this service applies, if applicable. If you select the Applicable to All Products check box on the Service page, the system does not display this grid.

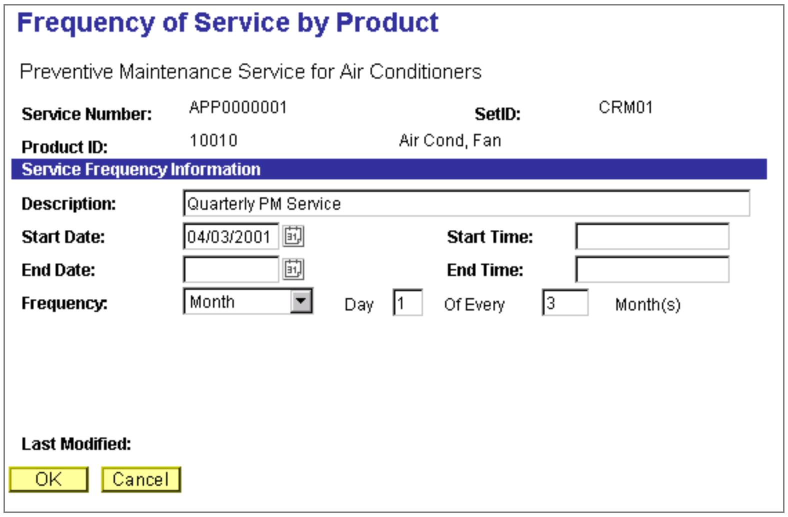
Product ID	The identification of the product to which the service applies. When you add a product to an agreement line or service order, the system validates that the product has been defined for the service. Before you can add a product to the service, the product must first be established in your system tables either by using the Product EIP or the Product Definition component. The product must have a status of *Active* and the corresponding item must be defined as *Serviceable*. Click the transfer button to access the Product Definition component.

For more information about product definition, see Setting Up Products in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Description	The description associated with the product.
Item ID	The item ID associated with the product.
Short Desc (short description)	The short description associated with the **Item ID.**
Frequency	Click the **Frequency** link to access the Frequency of Service by Product page, where you can view and if necessary modify the service frequency defined for the product. The Frequency of Service by Product page is documented in the next section.

Frequency of Service by Product Page

Usage	Use the Frequency of Service by Product page to define for informational purposes how often a service should be performed for a specific product. You can use this information to schedule, for example, preventative maintenance service orders for customers with service agreements that cover a specific product.
Object Name	RF_SVC_PRD_FREQ
Navigation	**Define Business Rules, Structure FieldService, Use, Service**
Access Requirements	Click the Frequency link on the Service Details page, which is documented earlier in this chapter.



Frequency of Service by Product page

The system displays the service description, **Service Number,** the **SetID,** and the **Product ID** and product description of the product for which the service frequency is defined.

Service Frequency Information

For informational purposes, the fields under **Service Frequency Information** define how often a service should be performed.

Description A description of the service frequency for the product. When you define a new service for a product, you can enter a description of the service frequency using up to 80 alphanumeric characters.

Start Date The beginning date of the period for which product service frequency is defined. The system displays the offer start date defined for the service on the Service page.

Start Time The beginning time of the period for which product service frequency is defined. The time zone displayed for this value represents the time zone of the database server.

End Date The end date of the period for which the product service frequency is defined. A blank value indicates an unlimited frequency period.

End Time The end time of the period for which the product service frequency is defined. The time zone displayed for this value represents the time zone of the database server.

Frequency A combination of values that specify how often the product service should be preformed.

Month: If you select a monthly service frequency, define the day of the month on which the product service should be scheduled and the duration of this frequency in number of months.

Day: If you select a daily product service frequency, define the duration of this frequency in number of days.

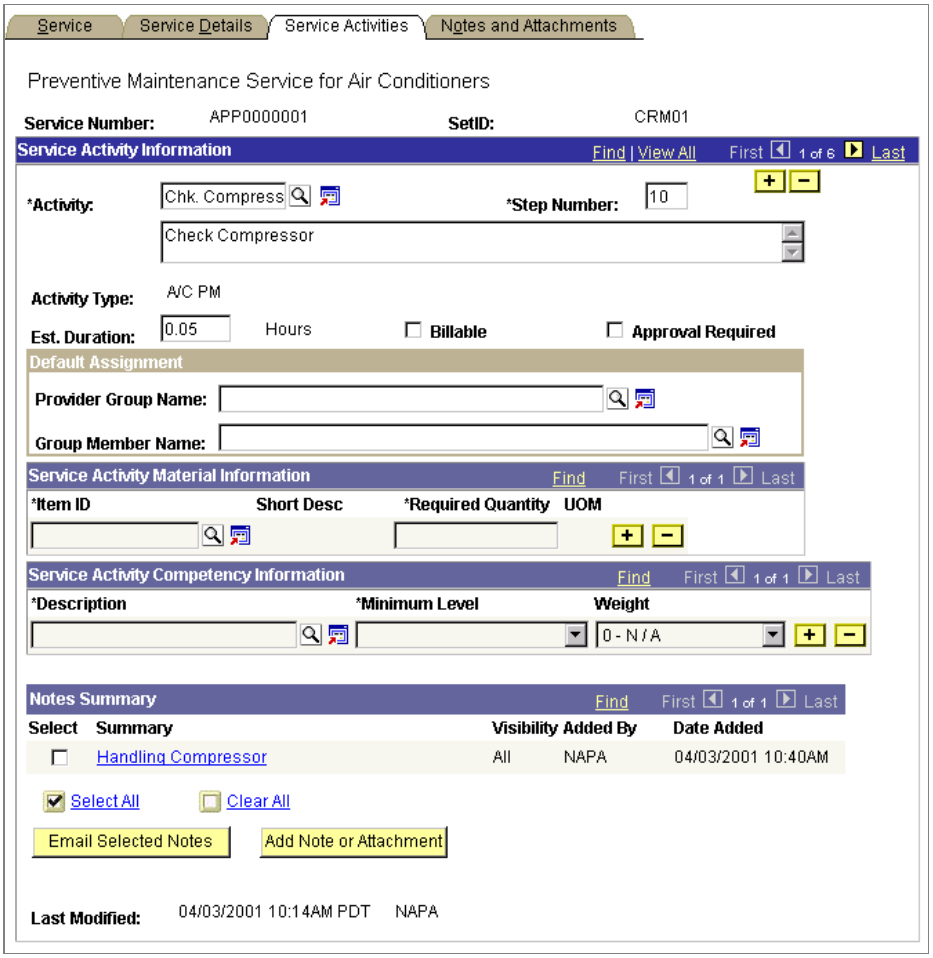
Week: If you select a weekly product service frequency, define the duration of this frequency in number of weeks and specify the day or days of the week on which to perform the service.

Year: If you select a yearly product service frequency, define the month and the day of the month to perform the service.

The **Last Modified** field displays a time stamp showing when the product service frequency record was last updated and the name of the person who made the change.

Service Activities Page

Usage	Use the Service Activities page to define the activities required to perform the service. **Note.** Activities are not required for service definition.
Object Name	RF_SERVICE_ACT
Navigation	**Define Business Rules, Structure FieldService, Use, Service**
Prerequisites	Before you can define activities for a service, service activity codes must first be defined for the setID on the Service Activity Code page, which is documented earlier in this chapter.
Access Requirements	Select the Service Activities tab.



Service Activities page

The system displays the service name, the **Service Number** of the service, and the **SetID.**

Service Activity Information

The **Service Activity Information** grid captures details about each activity associated with the service.

Activity	The identification of the activity. Activity codes must first be defined on the Service Activity Code page. When you select an activity code, the system populates the service activity information with the information defined for the activity code.
Activity Type	The code used to categorize the activity for informational purposes. Activity type codes are defined on the Activity Types page and associated with activities on the Service Activity Code page. The Activity Types page is documented earlier in this chapter.
Step Number	The number used to sequence the service activity list.

Est. Duration (estimated duration)
The estimated time in hours required to perform the activity. By default, the system populates this field with the valued defined on the Activity Code page.

Billable
Indicates that some portion of the time, materials, and expenses associated with the activity can be billed to the customer when the activity is included on a service order line. By default, the system populates this field with the valued defined on the Activity Code page. The system populates the service order lines with the setting indicated by this check box. You can change the setting for specific service order lines as necessary.

Approval Required
Indicates that when the activity is specified for a service order line, the service order line must be manually approved before time, expense, and material management transactions can be entered on the service order line. By default, the system populates this field with the valued defined on the Activity Code page.

The system populates the service order lines with the setting indicated by this check box. If approval processing is not defined for the service, you can change the approval setting on the service order line to require approval processing. However, if approval processing is required for the service, it will also be required on the service order line. You cannot change the approval setting on the service order line when the service specifies approval processing.

Default Assignment

The **Default Assignment** group box enables you to define a preferred provider group and group member to perform the activity. The system uses these values to initially populate the service order line, but you can modify the default assignment for specific order lines as necessary.

Provider Group Name
The name of the provider group that the system automatically populates on service order lines requesting this service. This value can be modified on the service order line as necessary.

Group Member Name
The name of the provider group member that the system automatically populates on service order lines requesting this service. This value can be modified on the service order line as necessary.

Service Activity Material Information

The **Service Activity Material Information** grid lists the items used to perform the service activity. When a service order line is created for this service activity, the system populates the associated manage material record with the activity material information defined in this grid. From the Manage Material component, you add additional items and order the required materials as necessary.

Note. The system does not retrieve the service material information, if activities have been defined for the service. If you define service activities, define service activity material information in the **Service Activity Material Information** grid.

For more information about the Manage Material component, see the Managing Service Order Material Requirements chapter.

Item ID

The ID of the item used to perform the service activity. Before you can add an item to the service activity, the item must first be established in your system tables either by using an EIP application message or the Item Definition component and the item must have a status of *Active*. Click the transfer button to access the Item Definition component.

For more information about item definition, see Defining Items in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Short Desc (short description)

The short description associated with the item definition.

Required Quantity

The minimum amount of the item that the technician needs to perform the service activity. The system uses this value to populate the quantity required on the Manage Material page.

For more information about the Manage Material component, see the Managing Service Order Material Requirements chapter.

UOM (unit of measure)

The standard unit of measure for the item quantity.

Service Activity Competency Information

The **Service Activity Competency Information** grid displays the competency requirements that the assigned technician needs to perform the service activity. This information is used by the system to find the best technician to assign to the service order line. The system compares the group member's competencies with the competency at the activity level.

For more information about how competency information is set up and used by the system, see Managing Workforce Competencies in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Competency The description of the competency required to perform the service activity. Competencies must first be established on the Competencies page under the General Options menu.

For more information about the Competencies page, see Managing Workforce Competencies in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Minimum Level The minimum level of competency that the assigned technician must have to perform the service. The available options depend on the competency rating model defined for the selected competency. When searching for technicians to assign to service order lines, the system calculates higher fit scores for those technicians who meet or exceed the minimum level of competency defined for the activity.

For more information about how competencies are used in task assignment searches, see Setting Up and Performing Task Assignment Searches in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Weight The relative importance of this competency. Each activity competency can have a value from ***0*** to ***5,*** where ***5*** represents the highest level of importance. A weight of ***0*** indicates that the competency is not included in the assignment search.

Notes Summary

The **Notes Summary** grid lists notes and attachments that are related to the activity.

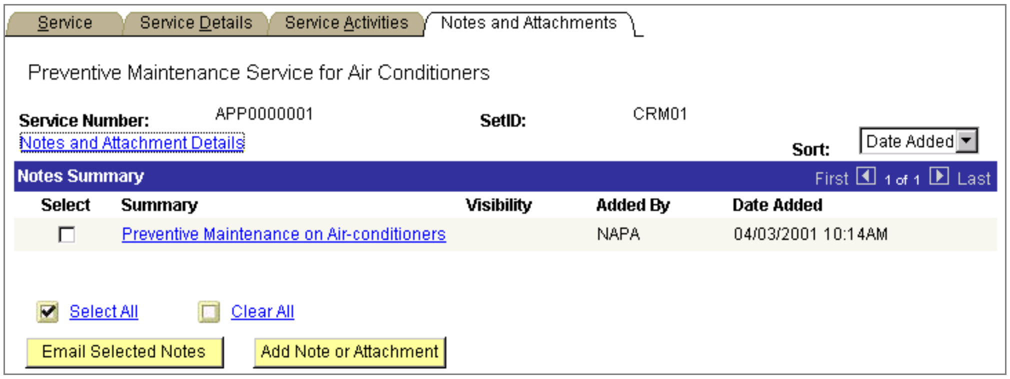
For more information about the fields in the Notes Summary grid, see Adding Notes and Attachments in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

The **Last Modified** field displays a time stamp showing when the service definition record was last updated and the name of the person who made the change.

Notes and Attachments Page

Usage	Use the Notes and Attachments page to add, view, and modify notes associated with a service definition.
Object Name	RF_SVC_NOTES_SUM
Navigation	**Define Business Rules, Structure FieldService, Use, Service**

Access Requirements	Select the Notes and Attachments tab.



Notes and Attachments page

For more information about the fields on this page and about notes functionality in PeopleSoft CRM, see Adding Notes and Attachments in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

CHAPTER 5

Creating and Managing Service Orders

A service order records a request for one of the services provided by your company. Once created, you can assign a service order to the technicians who will perform the requested work, order any materials required to perform the work, and track the progress of the work using the status values available on the service orders. You can also record expenses and labor time incurred while performing the requested work.

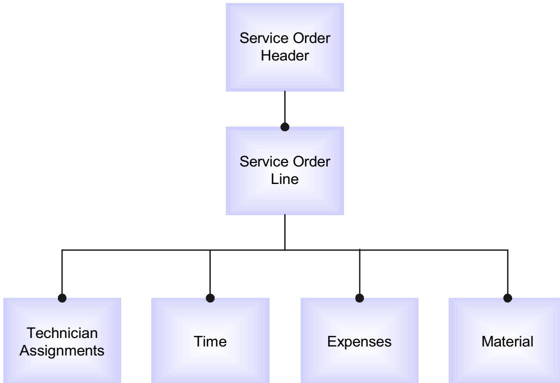
In PeopleSoft CRM applications, you can enter multiple service orders for a case in PeopleSoft CRM Support or enter a service order directly in PeopleSoft CRM FieldService. The pages of the Service Order component are designed to meet the needs of dispatchers and call center agents. In addition to the Service Order component, PeopleSoft CRM FieldService offers the My Service Order component, which enables service technicians to work with a streamlined view of the service orders that have been assigned to them.

For more information about the My Service Order component, see the Working With My Service Orders chapter.

The following sections detail the service order data model, service order status values, workflow notifications available for service orders, and the pages of the Service Order component.

Understanding the Service Order Data Model

Each service order is composed of a header, which captures customer information, and at least one line, which represents the work requested by the customer. As illustrated in the following diagram, each line of a service order is associated with one or more technician assignment, time, expense, and material management records.



Service order data model

Time, expense, and material management records are automatically created for each line added to the service order. Update these records using the corresponding component pages: the Manage Time page, the Manage Expenses page, and the Manage Material page. Technician assignments are made directly on the Service Order page.

Understanding Service Order Status

The service order status reflects the current processing state of a service request. The processing status is tracked at two levels: the service order header and the service order line. The header level reflects the general processing status of the entire service request, while the status at the line level provides a more detailed view of the processing status of each activity associated with the service request.

Status at the Service Order Header Level

At the header level, a service order can have one of four status values:

Open	The service request is still in process and has not been completed. This is the initial status of a new service order. At the service order header level, the status will remain open until all associated service order lines have a status of *Completed*, *Canceled*, or *Closed*.

Completed

The service request has been finished, but not all of the time, expense, and material information has been entered. When all associated service lines have a status of *Completed*, *Canceled*, or *Closed*, the system automatically changes the status at the service order header level to *Completed.* While the service order header reflects a *Completed* status, you can record time, expense, material usage, and billing information (if the service order is billable) and you can view address information. However, you cannot order additional material for the service order or change any of the field values on the Service Order page except the status value. You can change the status from *Completed* to *Closed* or *Canceled.*

Note. A service order can have the status *Completed* at the header level only if both of the following are true:

- The status of all associated lines is *Canceled* or *Completed.*
- The service order has been approved at the header level, if approval is required.

Closed

The service request has been finished and all time, expense, and material information has been entered. For billable service orders, select the Ready to Bill check box on the Billing Information page when all time, material, expense, and billing information has been recorded for a *Completed* service order and then set the service order status to *Closed* to indicate that billing processes may now be initiated for the service order. Once the service order header status is *Closed*, you cannot change the status again nor make any changes to the service order or to the associated time, material, and expense records or billing information.

Note. You can change the status to *Closed* at the service order header level only if both of the following are true:

- The current header status is *Completed.*
- If the service order is billable, the Ready to Bill check box on the Billing Information page has been selected.

Note. As delivered, PeopleSoft CRM FieldService does not provide integration with billing systems. Billing data recorded in the system is for informational purposes only.

Canceled The service request has been canceled. You can select the *Canceled* status at the service order header level only if all associated service lines have a status of *Completed*, *Canceled, or Closed.* Once the service order header is set to *Canceled*, you cannot change the status again nor modify any other fields on the Service Order page. However, you can continue to enter associated time, material, and expense records for the associated *Completed* or *Canceled* service order lines and you can initiate billing processes for any time, material, or expenses previously recorded for the *Closed* lines on the *Canceled* service order.

Status at the Line Level

Each service line on a service order can have one of ten status values:

Open – Hold Assignment No technician has been assigned to the service order line. When you first create a service order, the system sets the header status to *Open* and the line status to this value.

Open - Assigned A technician has been assigned to the service order line. When a technician is assigned to a service order line, the system automatically changes the line status to this value.

Open - Accepted The assigned technician has accepted assignment of the service order line. To accept an assignment, the technician or a representative for the technician manually changes the line status to this value.

Note. Once the status has been set to Open - Accepted, it cannot be changed to Open - Hold Assignment, Open - Assigned, or Open - Rejected.

Open - Rejected The technician assigned to perform the work has rejected the task. To reject an assignment, the technician or a representative for the technician manually changes the line status to this value. Lines with this status can be manually changed to *Open - Hold Assignment* or *Open - Assigned.*

Note. Changing the service order line to *Open - Accepted* or *Open - Rejected* applies to all technicians assigned to the line. You cannot accept or deny specific assignments on a service order line.

Open - On Site	The technician is at the customer's site performing the work for the service line. On arrival at the customer's site, the technician or a representative for the technician manually changes the line status to this value. The system records the date and time that this status value is selected as the Actual Start Date and Actual Start Time for the service order line if values do not already exist for these fields. If necessary, you can modify the actual start date and time information. **Note.** Once the status has been set to Open - On Site, it cannot be changed to Open - Hold Assignment, Open - Assigned, or Open - Rejected.
Open - Hold Customer	Work for the service order line is on hold pending some action required from the customer. This status value is informational only and can be set manually for a service order line in any of the *Open* status values.
Open - Hold Part	Work for the service order line is on hold pending receipt of ordered material. This status value is informational only and can be set manually for a service order line in any of the *Open* status values.
Completed	The requested service activity on the service order line has been finished, but not all of the time, expense, and material information has been entered. When all associated service lines have a status of *Completed*, *Canceled*, or *Closed*, the system automatically changes the status at the service order header level to *Completed*. When the service order line reflects this status value, you can record time, expense, and material usage; however, you cannot order additional material for the service order or change any of the field values on the service order line except the status value. You can change the status on the service order line from *Completed* to *Closed* or *Canceled.* The system records the date and time that the *Completed* status value is selected for the service order line as the Actual End Date and Actual End Time for the service order line if values do not already exist for these fields. If necessary, you can modify the actual end date and time information. **Note.** If the service order line requires approval, the line must be approved before you change its status to *Completed*.

Closed Indicates a service order line has been finished and all time, expense and material information has been entered. When all time, material, expense, and billing information has been recorded for a *Completed* service order line, you can select this status to indicate that billing processes can be initiated for the service order. Once the service order line status is *Closed*, you cannot make any changes to the line or to the time, material, and expense records associated with the line.

Canceled Indicates a service order line as been canceled. You cannot select this status value if the service order line status is *Completed.* Once the service order line status is *Canceled*, you cannot make any changes to the fields on the service order line or order material for the line. However, you can continue to capture associated time, material, and expense records for the line until the status at the header level is changed to *Closed*.

Summary of Time, Expense, and Material Availability Based on Status

For combinations of *Open, Completed, Closed,* and *Canceled* status values at the service order header and line levels, the following table summarizes when the time, expense, and manage material transactions can be recorded.

Header Status	***Line Status***	***Time/Expense/Material***
Open	Canceled	Enabled
Open	Completed	Enabled
Open	Closed	Disabled
Canceled	Canceled	Enabled
Canceled	Completed	Enabled
Canceled	Closed	Disabled
Completed	Canceled	Enabled
Completed	Completed	Enabled
Completed	Closed	Disabled
Closed	Canceled	Disabled
Closed	Closed	Disabled

Understanding Service Order Assignment Notifications

Service order assignment workflow rules can be enabled to notify the affected provider groups and group members when a service order is assigned and when the service order assignment is changed. Notifications to the provider group and the assigned group member are triggered when you make a new assignment, when you reassign a previously assigned service order line, and when you delete an assignment. If you select the Broadcast to All Members option on the

Provider Group page, assignment notifications will also be sent to all members of the provider group, which means that the assigned group members will receive two notifications for each trigger event.

For more information about the Provider Group page, see Setting Up and Maintaining Provider Groups and Group Members in the *PeopleSoft CRM Application Fundamentals PeopleBook.* **For more information** about enabling service order assignment workflow, see Setting Up Assignment Workflow Notifications in this chapter.

When a service assignment is accepted or rejected or when a service order line is canceled, assignment workflow rules also send notification messages to the person who created the service order—that is, the person who's user ID is listed in the Entered By field on the service order.

Notifications can be published as worklist entries, emails, or both, depending on the user profile of the person receiving the notification and other system settings. Email notifications provide a link to the service order where the notification trigger event occurred.

As delivered, the system offers the following workflow rules for service order assignment notifications:

Service Order Assignment Change Workflow

Workflow Description	Sends an "assigned" message to the affected provider groups and group member when a service order line is assigned and when the service order line assignment is modified. When the assignment of a service order line is modified, the workflow also sends "unassigned" messages to the previously assigned provider group and group members.
Trigger Event	Saving the service order after a provider group or group member assignment for a service order line is specified or changed. A notification is triggered for each service order line that is assigned or reassigned.

Service Order Line Cancellation Workflow

Workflow Description	Sends a "canceled" message to the assigned provider groups and group members on a service order line when the service order line's status is changed to *Canceled*.
Trigger Event	Saving the service order after any of the service order line status values have been changed to *Canceled.* A notification is triggered for each service order line that is canceled.

Service Order Assignment Accepted Workflow

Workflow Description	Sends an "assignment accepted" message to the creator of the service order when any of the service order line status values are changed to *Open - Accepted.*

Trigger Event	Saving the service order after any of the service order line status values have been changed to *Open - Accepted.* A notification is triggered for each service order line assignment that is accepted.

Note. The *Open - Accepted* status applies to all assignments on the line. You cannot accept or deny specific assignments on a service order line.

Service Order Assignment Rejection Workflow

Workflow Description	Sends an "assignment rejected" message to the creator of the service order when any of the service order line status values are changed to *Open - Rejected.*
Trigger Event	Saving the service order after any of the service order line status values have been changed to *Open - Rejected.* A notification is triggered for each service order line assignment that is rejected.

Note. The *Open - Rejected* status applies to all assignments on the line. You cannot accept or deny specific assignments on a service order line.

Setting Up Assignment Workflow Notifications

To enable assignment notifications, you must define provider groups and group members, establish routing preferences and email addresses for the provider groups and group members, and establish routing preferences and email addresses for the people who create service orders.

To set up service order assignment notification workflow:

1. Associate worklist groups with each provider group (optional).

   When a service order line assignment is made or modified, a worklist entry can be created for the worklist group established for the provider groups that were affected by the assignment or assignment change. A worklist group must first be defined on the Worklist Groups page and then associated with a provider group on the Provider Group page.

   For more information about defining worklist groups, see Using Worklists in the *PeopleSoft CRM Application Fundamentals PeopleBook.* **For more information** about defining provider groups, see Setting Up and Maintaining Provider Groups and Group Members in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

2. Define an email address for the Provider Group (optional).

   In addition to creating an entry in the group worklist associated with the provider group, the system can also send assignment notifications to an email address representing the provider group. To implement this notification option, enter an appropriate email address for the provider group in the Email Address field on the Provider Group page.

3. Define whether assignment notifications will be sent to each member of the provider group.

   In addition to or instead of sending assignment notifications to the provider group, you might want to send assignment notifications to each member of the provider group. To implement this notification option, select the Use Members to Broadcast check box on the Provider Group page. When this check box is selected, each member of the provider group will receive notification when an assignment or an assignment change affects the provider group. The notification will be published as a worklist entry, an email, or both, depending on the routing preferences defined for the group member on the Workflow page of the User Profiles component.

For more information about defining user profiles, see User Profiles in the *PeopleTools PeopleBook.*

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4. Define valid email addresses for the people who receive email notifications.

   Provider group members and the people who can create service orders in your system are potential receivers of service order assignment notification email messages. Define a primary email address for these people on the Address/Phone/Email page of the Worker component.

Note. Person IDs defined in the Worker component are associated with user IDs in the User Profile component in the Maintain Security menu. For workflow notifications to function as designed, each person in your system should be linked to only one user ID.

For more information about defining user profiles, see User Profiles in the *PeopleTools PeopleBook.* **For more information** about the Worker component, see Managing Workers in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Understanding Service Order Escalation Notifications

Service order escalation workflow rules notify the creator of the service order—the person who's user ID is listed in the Entered By field on the service order—when the service order is not being processed within a set period. Escalation messages are triggered when a specific condition is not met at a system-defined point in the time period defined by when the service order was initially created and the required start time or required end time specified on the service order.

As delivered, the system offers the following workflow rules for service order escalation notifications:

Service Order Not Started Workflow

Description

The system schedules a service order line status check process to run at two time points equal to 100 percent and 120 percent of the required processing period. If there is no actual start date and time and the status of the service order line is not set to *Open - On Site, Completed, Closed,* or *Canceled* at either of these two points, the system sends a "not started" message to the service order creator. If the status of the service order line is set to *Open - On Site, Completed, Closed,* or *Canceled* at any of the check points, the scheduled notifications are canceled.

The service order creation date and the required start date on the service order line define the required processing period for the workflow.

The system reschedules notifications when both of the following events occur:

- The required start date or time on the service order line is changed.
- The actual start date and line values are deleted prior to the date and time recorded in the required end date and time fields.

When these events occur, the system reschedules the status check process to run at 100 percent and 120 percent of the new required processing period and any pending processes for the old processing period are canceled.

Trigger Event

Failure of the service order line to meet the required status condition at either of the two check points: 100 percent and 120 percent of the required processing period. A notification is triggered for each service order line that is not set to *Open - On Site, Completed, Closed,* or *Canceled* at the time the status check process runs.

Service Order Not Assigned Workflow

Description	The system schedules a service order line status check process to run at three time points equal to 20 percent, 50 percent, and 100 percent of the required processing period. If no technician is assigned to the line or if the status of the service order line is not set to *Open - On Site, Completed, Closed,* or *Canceled* at any of these three points, the system sends a "not assigned" message to the service order creator. If the service order line is assigned to the technician at any of the check points, the scheduled notifications are canceled. The service order creation date and the required start date on the service order line define the required processing period for the workflow. The system reschedules notifications when both of the following events occur: • The status is set to *Open - Rejected* for a service order line with a valid requested start date. • The line status is changed and there is no assignment. When these events occur, the system reschedules the status check process to run at 20 percent, 50 percent, and 100 percent of the new required processing period and any pending processes for the old processing period are deleted.
Trigger Event	Failure of the service order line to meet the required status condition at any of the three check points: 20 percent, 50 percent, and 100 percent of the required processing period. A notification is triggered for each service order line that does not have at least one technician assigned and is not set to *Open - On Site, Completed, Closed,* or *Canceled* at the time that the status check process runs.

Service Order Not Completed Workflow

Workflow Description	The system schedules a service order line status check process to run at two time points equal to 80 percent and 100 percent of the required processing period. If there is no actual end date and time and the status of the service order line is not set to *Completed, Closed,* or *Canceled* at either of these two points, the system sends a "not completed" message to the service order creator. If the status of the service order line is set to *Completed, Closed,* or *Canceled* at any of the check points, the scheduled notifications are canceled.

The service order creation date and the required end date on the service order line define the required processing period for the workflow.

The system reschedules notifications when both of the following events occur:

- The required end date or time on the service order line is changed.
- The actual end date and line values are deleted prior to the date and time recorded in the required end date and time fields.

When these events occur, the system reschedules the status check process to run at 80 percent and 100 percent of the new required processing period and any pending processes for the old processing period are canceled.

Trigger Event

Failure of the service order line to meet the required status condition at either of the two check points: 80 percent and 100 percent of the required processing period. A notification is triggered for each service order line that is not set to *Completed, Closed,* or *Canceled* at the time that the status check process runs.

Service Order Response Time Exceeded Workflow

Description

When an actual start date and time are entered for the service order line, the system compares this date and time with the required start date and time. If the actual start date and time is later than the required start date and time, the system sends a "response time exceeded" message to the service order creator. This message is also sent when the actual start date and time values are deleted after the date and time recorded in the required start date and time fields.

If the required start date and time or the actual start date and time is changed, the system checks again for an exceeded response time condition.

Trigger Event

An actual start date and time that is later than the required start date and time. A notification is triggered for each service order line for which work begins after the required start date and time.

Service Order Restore Time Exceeded Workflow

Description	When an actual end date and time are entered for the service order line, the system compares this date and time with the required end date and time. If the actual end date and time is later than the required end date and time, the system sends a "restore time exceeded" message to the service order creator. This message is also sent when the actual end date and time values are deleted after the date and time recorded in the required end date and time fields. If the required end date and time or the actual end date and time is changed, the system checks again for an exceeded restore time condition.
Trigger Event	An actual end date and time that is later than the required end date and time. A notification is triggered for each service order line for which work ends after the required start date and time.

Setting Up Escalation Workflow Notifications

To enable escalation notifications, you must activate the appropriate workflow rules and establish routing preferences and email addresses for the people who create service orders.

To set up service order escalation workflow:

1. Activate the workflow rule.

   As delivered, the system includes three workflow rules for service order escalations: Service Order Not Assigned, Service Order Not Completed, and Service Order Not Started. You must activate each of these rules by selecting the Active Flag check box on the Rules page of the Workflow Actions component.

   For more information about the Workflow Actions component, see Defining Workflow in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

2. Define notification routing preferences for the people who enter service orders.

   The escalation workflow processes send notifications to the person who entered the service order when work for each service order line is not progressing on time or if response and restore entitlements have not been met. These notifications are sent using the notification routing preferences specified for the person's user ID. On the Workflow page of the User Profiles component, indicate whether the person is a worklist user, an email user, or both. Note that if both the Worklist User and Email User check boxes are selected for the person, two notices—an email and a worklist entry—will be sent each time the workflow process is triggered for a service order line that he or she created.

For more information about defining user profiles, see User Profiles in the *PeopleTools PeopleBook.*

3. Define valid email addresses for the people who receive email notifications.

   All of the people who can create service orders in your system are potential receivers of service order escalation notification email messages. Define a primary email address for these people on the Address/Phone/Email page of the Worker component.

Note. Person IDs defined in the Worker component are associated with user IDs in the User Profile component in the Maintain Security menu. For workflow notifications to function as designed, each person in your system should be linked to only one user ID.

For more information about defining user profiles, see User Profiles in the *PeopleTools PeopleBook.* **For more information** about the Worker component, see Managing Workers in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Entering and Updating Service Orders

The Service Order component accessed from cases in PeopleSoft CRM Support or from the menu in PeopleSoft CRM FieldService enables you to record a customer's service request and manage the delivery of the requested service.

Understanding When Service Order Fields Can Be Modified

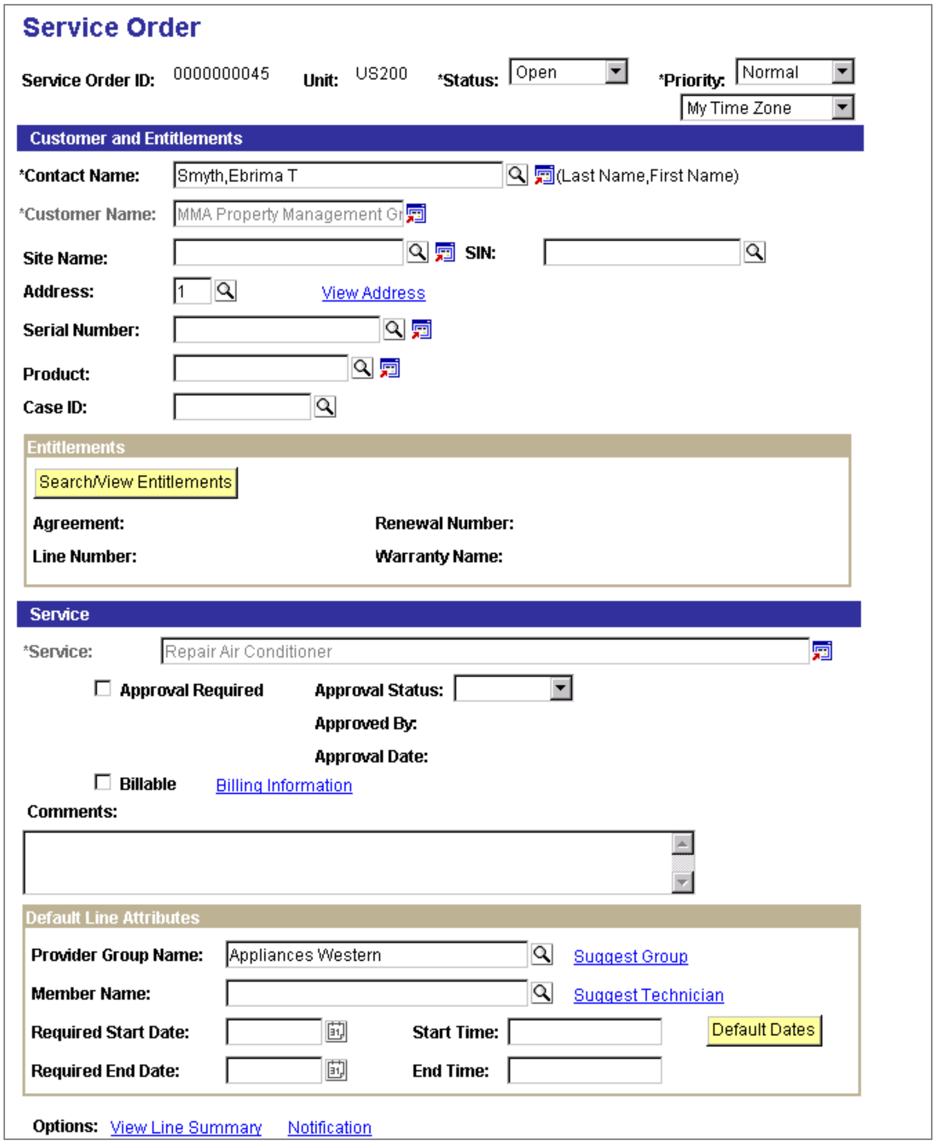
The availability of fields on the service order header depends on whether the service order has been saved, how you access the Service Order component, and whether the service order is covered by an agreement or warranty. The following list outlines the conditions that prevent changes to specific fields on the service order:

- After a service order is saved, you cannot modify the Customer Name field.
- If an agreement has been selected, you cannot modify the followings fields:
  - Customer Name
  - Site Name
  - SIN
  - Product
  - Serial Number

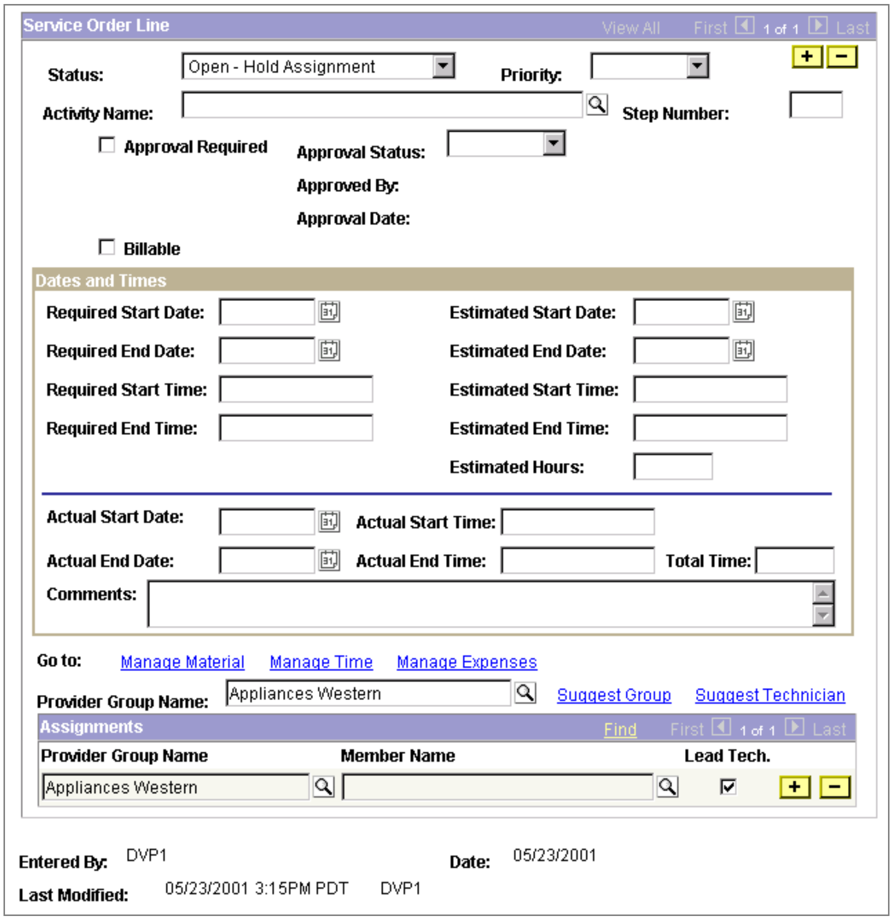
- If a warranty has been selected, you cannot modify the following fields:
  - Customer Name
  - Product
  - Serial Number
- For an on-demand service order—that is, a service order for which no agreement or warranty has been selected—you cannot modify the Customer Name field.
- If the service order was created from a case, the you cannot modify the following fields:
  - Customer Name
  - Site Name
  - Contact
  - Product
  - Serial
  - Case Number

Service Order Page

Usage	Use the Service Order page to create or review service orders. **For more information** about the service order business process, see Understanding the Service Order Data Model in this chapter.
Object Name	RF_SERVICE_ORDER
Navigation	• **Manage FieldService, Maintain Service Orders, Use, Service Order** • To add a service order to a PeopleSoft CRM Support case, access the Related Objects page of the PeopleSoft CRM Support Case component, select an action of *Create Service Order*, and click the Go button. • When a service order is related to a PeopleSoft CRM Support case, click the Details link for the service order on the Related Objects page.
Access Requirements	Enter a business unit and service order ID. You can enter *Next* as the service order ID if automatic numbering for service orders has been enabled. **For more information** about automatic numbering, see Using Automatic Numbering in *PeopleSoft CRM Application Fundamentals PeopleBook.*



Service Order page (1 of 2)



Service Order page (2 of 2)

The system displays the **Service Order ID** and business **Unit** that you entered to access the page. The top of the page also provides status, priority, and time zone information for the service order.

Status

The current status of the service order at the header level.

For more information about service order header and line status, see Understanding Service Order Status in this chapter.

Priority

The current priority associated with the service order: ***Low, Normal, High,*** or ***Urgent.*** Service order lines with an ***Urgent*** priority are displayed on the Dispatch Board with a stripe. You can also design notification processes based on these priorities using the workflow features available in PeopleTools. By default, new service orders have a ***Normal*** priority and new service order lines reflect the priority of the service order header.

For more information about the Dispatch Board, see the Working With the Dispatch Board chapter. **For more information** about designing workflow notifications, PeopleSoft Workflow in the *PeopleTools PeopleBook.*

Time Zone

The time zone that the system uses to display start and end times on the service order. To convert the displayed times to an alternate time zone, you can toggle between the following options:

My Time Zone: Your local time zone, according to your browser.

Customer: The customer's time zone, based on the time zone for the customer address associated with the contact person.

For more information about time zones, see Working With Time Zones in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Customer and Entitlements

The fields under **Customer and Entitlements** provide header-level information for the service order. When you create a service order from the PeopleSoft CRM Support Case component, the system automatically populates these fields using the data entered for the case.

The fields under **Customer and Entitlements** are not always available for entry. **For more information** about when these fields can be modified, see Understanding When Service Order Fields Can Be Modified in this chapter.

Contact Name

The name of the person who placed the service request. To add a contact name, use the last name, first name format for data entry. If you enter a contact name first, the system automatically populates the **Customer Name, Site Name,** and address information. Before you can specify a contact, the contact must first be established in your system. To define a new contact, click the transfer button to quickly access the Maintain Contact component.

For more information about the Maintain Contact component, see Maintaining Contacts in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Customer Name The name of the customer requesting service. A customer name is required on a service order. Before you can select a customer on a service order, the customer must first be established in your system. To define a new customer, click the transfer button to access the Maintain Customers component.

Site Name The site where the requested service will be performed. Multiple sites can be associated with each customer. To define a new site for a customer, click the transfer button to access the Sites page of the Maintain Customer component.

Note. You must enter the customer name first for the system to display the valid site names defined for the specified customer in the prompt list.

For more information about the Maintain Customer component, see Managing Customer Information in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

SIN (site identification number) The site identification number that is automatically generated for each valid site on an agreement at the time that the agreement was created.

Note. You must enter the customer name first for the system to display the valid SINs for the specified customer in the prompt list.

Address A specific address associated with a customer site. If only one address is associated with the site, the system automatically populates this address when you enter the customer and site. If multiple addresses are defined for the site, perform a search and select the applicable address. You can define multiple addresses for a customer on the Address page of the Maintain Customer component. If you specify an address you can click the View Address link to view the corresponding address on the Address Information page.

View Address Click this link to access the Address Information page, where you can view the address where the requested service will be performed. The Address Information page is documented later in this chapter.

Serial Number The serial number of the product that requires service. If you enter a serial number that is associated with an installed product record that does not have a status of *Uninstalled*, the system automatically populates the service order with the information available on the installed product record, including **Product, Customer Name, Contact Name,** and **Address.**

Product The identification of the product that requires service. Before you can specify a product ID, the product must be established in your system. To define a new product, click the transfer button to access the Product Definition component.

If you enter a product ID that is associated with an installed product record that does not have a status of *Uninstalled*, the system automatically populates the service order with the information available on the installed product record, including **Serial Number, Customer Name, Contact Name,** and **Address.**

Note. If more than one installed product record for a serial number or product is found, the system displays the Installed Product List page, where you can select the applicable installed product record.

For more information about installed product records, see Tracking Installed Products in the *PeopleSoft CRM Application Fundamentals PeopleBook.* **For more information** about the product definition, see Setting Up Products in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Case ID The identification of the case in PeopleSoft CRM Support associated with the service request, if applicable.

Entitlements

The fields in this group box display any warranty or agreement information returned by an entitlement search.

Search/View Entitlements

Click this button to perform an entitlement search or to view the details of entitlements for an agreement line or warranty that has already been associated with the service order. The system uses the information entered in the fields above the **Entitlements** group box to perform the initial entitlement search. If more than one agreement line or warranty matches the search criteria, the Entitlement Match page appears, enabling you to specify the applicable agreement line or warranty. When you select the applicable agreement line or warranty or if only one agreement line or warranty matches the search criteria, the system displays the Entitlement Detail page, where you can view the specific entitlements.

If you select OK on the Entitlement Detail page, the system populates the remaining fields in the **Entitlements** group box with the agreement or warranty information. In addition, the system populates the service order with the service defined on the agreement line. Once the service order has been saved, you cannot select another set of entitlements for the service order. After the agreement line or warranty information has been associated with the service order, you can click the **Search/View Entitlements** button to view the entitlement details on the Entitlement Detail page.

Note. For entitlement searches performed from the service order, the system considers only agreements with a scope of *Site.*

For more information about entitlement searches, see Performing Entitlement Searches for Cases and Service Orders in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Agreement

The identification of the customer's service agreement, if applicable.

Line Number

The agreement line number that defines the customer's entitlements, if applicable.

Renewal Number

The renewal number associated with the agreement, if applicable.

Warranty Name

The identification of the warranty that covers the specified installed product, if applicable.

Service

The fields under **Service** define the requested service and how the customer will be billed for the work, if applicable.

Service The requested service. Services must first be established in your system using the Service component. The system automatically creates service order lines for activities defined for the service on the associated agreement line or when the service is manually selected. You can modify the service order lines and add additional lines for other service activities if necessary.

For more information about the Service component, see the Setting Up Your Services chapter.

Approval Required Indicates whether a service order must be manually approved before any of the service order lines can be approved. The default value for this setting is specified when the service is defined in the Service component. If the approval is not required on the service definition, you can specify approval processing for the service on the service order. However, if the service definition requires approval, the **Approval Status** must be manually set to ***Approved*** on the service order.

Approval Status The current approval status of the service order. If the **Approval Required** check box is selected for the service, you must manually change the value from ***Pending*** to ***Approved.*** Once the approval status is changed to ***Approved,*** the field cannot be modified.

Note. If the service order requires approval, the status of the service order header cannot be changed to *Completed* or *Closed* until the approval status is set to ***Approved.***

For more information about service order status, see Understanding Service Order Status in this chapter.

Approved By The identification of the person who selected the status value ***Approved*** for the service order.

Approval Date The date that the status value ***Approved*** was selected for the service order.

Billable Indicates that some portion of the time, materials, and expenses associated with the service order can be billed to the customer. The default value for this field is specified during service definition on the Service page of the Service component but can be modified for the service order as necessary.

For more information about the Service component, see the Setting Up Your Services chapter.

Billing Information Click this link to access the Billing Information page, where you can view, and if necessary, modify the customer's billing method and address information. The Billing Information page is documented later in this chapter.

Comments Notes recorded about the service request.

Default Line Attributes

The fields in this group box define default values for new service order lines. When you add a new service order line, the system automatically populates the line with these values; however changing the field values in this group box will not affect values on any existing service order lines.

Provider Group Name The name of the provider group that will perform the requested service work. This field is initially populated with the provider group from the customer's agreement, if available, or from the specified service on the Service page. Provider groups must first be established on the Provider Group Definition page.

Suggest Group Click this link to select from a subset of provider groups on the Provider Group List page that are associated with the region derived from information on the service order.

For more information about provider group searches, see Setting Up and Performing Task Assignment Searches in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Member Name The name of the provider group member who will perform the requested service work. This field is initially populated with the group member from the customer's agreement, if available, or from the specified service on the Service page. To add a group member, use the last name, first name format for data entry. Group members must first be defined on the Provider Group Definition page or the Group Member page.

For more information about provider groups and group members, see Setting Up and Maintaining Provider Groups and Group Members in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Suggest Technician

Click this link to select from a ranked listing of qualified, available technicians on the Candidate List page. You must first select a provider group before you can generate a candidate list.

For more information about technician searches, see Setting Up and Performing Task Assignment Searches in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Required Start Date

The date that work on the service order line is required to begin. You must manually select an appropriate date based on the customer's entitlements or the customer's request. For new service orders, enter an appropriate default start date for the service order lines.

The system uses this date and the corresponding start time to trigger workflow processes that enable you to monitor and escalate service orders for which work has not begun on time and manage service orders for which the customer's guaranteed response time has been exceeded.

For more information about the service order workflow delivered with PeopleSoft CRM FieldService, see Understanding Service Order Assignment Notifications in this chapter.

Start Time

The time that work on the service order line is required to begin on the required start date.

Required End Date

The date that work on the service order line is required to be completed. You must manually select an appropriate date based on the customer's entitlements, the customer's request, or the total duration of the service. For new service orders, enter an appropriate default end date for the service order lines.

The system uses this date and the corresponding end time to trigger workflow processes that enable you to monitor and escalate service orders for which work has not ended on time and to manage service orders for which the customer's guaranteed restore time has been exceeded.

For more information about the service order workflow delivered with PeopleSoft CRM FieldService, see Understanding Service Order Assignment Notifications in this chapter.

End Time The time that work on the service order line is required to be completed on the required start date.

Note. Required start and end dates and times are used to populate the assigned technician's availability calendar. You cannot assign a technician to the service order line without specifying the required start and end dates and times.

Default Dates Click this button to populate the blank **Required Start Date** and **Required End Date** fields on the service order lines with the dates specified in the **Default Line Attributes** group box. Clicking this button will not override any existing date values on the service order line.

Options

The **Options** line offers two links:

View Line Summary Click this link to access the Service Order Line Summary page, where you can view a summary of all lines associated with the service order. The Service Order Line Summary page is documented later in this chapter.

Notification Click this link to access the Send Notifications page, where you can to send an action item to a worklist or email address.

For more information about the Send Notifications page notifications, see Using Worklists in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Service Order

The **Service Order Line** scroll area lists each line associated with the service order. Every service order has at least one line.

Status The current status of the service order line.

For more information about service order header and line status, see Understanding Service Order Status in this chapter.

Priority

The current priority associated with the service order line: ***Low, Normal, High,*** or ***Urgent.*** Service order lines with an ***Urgent*** priority are displayed on the Dispatch Board with a red stripe. Worklist entries created by the service order workflow notification processes also reference the priority of the service order line. You can design additional notification processes based on these priorities using the workflow features available in PeopleTools.

For more information about the Dispatch Board, see the Working With the Dispatch Board chapter.

Activity Name

The activity to be performed for the service order line. Activities are not required on a service order. Service activities must first be established in your system using the Service Activity Code page.

Multiple service activities can be associated with each service defined in your system using the Service Activity page of the Service component. The system automatically creates service order lines for any service activities defined for the service when you select the service. You can modify the service order lines and add additional lines for other service activities if necessary.

For more information about defining service activities, see the Setting Up Your Services chapter.

Step Number

The number used to sequence the service order lines. Service order lines are listed in order starting with the smallest step number.

Approval Required

Indicates that a service order line must be manually approved before time, expense and material can be recorded. Technicians can be assigned even if the service order line has not been approved. The service order header must be approved, if required, before you can approve any of the associated service order lines.

The default value for this setting is specified for the service activity when the service activity is defined with the Service component. If the approval is not required on the service activity definition, you can specify approval processing for the service activity on the service order line. However, if the service definition requires approval, the **Approval Status** must be manually set to ***Approved*** on the service order.

Approval Status The current approval status of the service order line. If the **Approval Required** check box is selected for the service order line, you must manually change the value from ***Pending*** to ***Approved.*** Once the approval status is changed to ***Approved,*** the field cannot be modified.

Approved By The identification of the person who selected the status value ***Approved*** for the service order line.

Approval Date The date that the status value ***Approved*** was selected for the service order line.

Billable Indicates that some portion of the time, materials, and expenses associated with the service order line can be billed to the customer. The default value for this option is set on the Service Activity page of the Service component.

Dates and Times

The fields in the **Dates and Times**this group box specify required, estimated, and actual start and end periods for performing the work on the service order line, plus the total amount of time to perform the work.

Required Start Date The date that work on the service order line is required to begin. You must manually select an appropriate date based on the customer's entitlements or the customer's request. For new service order lines, enter an appropriate start date or leave the field blank and click the **Default Dates** button to populate this field with the dates specified in the **Default Line Attributes** group box.

The system uses this date and the corresponding required start time to trigger workflow processes that enable you to monitor and escalate service orders for which work has not begun on time and manage service orders for which the customer's guaranteed response time has been exceeded.

For more information about the service order workflow delivered with PeopleSoft CRM FieldService, see Understanding Service Order Assignment Notifications in this chapter.

Required Start Time

The time that work on the service order line is required to begin on the required start date. You must manually enter an appropriate start time based on the customer's entitlements or the customer's request. For new service order lines, enter an appropriate start time or leave the field blank and click the **Default Dates** button to populate this field with the start time specified in the **Default Line Attributes** group box.

Required End Date

The date that work on the service order line is required to be completed. You must manually select an appropriate date based on the customer's entitlements, the customer's request, or the total duration of the service. For new service order lines, enter an appropriate end date or leave the field blank and click the **Default Dates** button to populate this field with the dates specified in the **Default Line Attributes** group box.

The system uses this date and the corresponding required end time to trigger workflow processes that enable you to monitor and escalate service orders for which work has not ended on time and to manage service orders for which the customer's guaranteed restore time has been exceeded.

For more information about the service order workflow delivered with PeopleSoft CRM FieldService, see Understanding Service Order Assignment Notifications in this chapter.

Required End Time

The time that work on the service order line is required to be completed on the required end date. You must manually enter an appropriate time based on the customer's entitlements, the customer's request, or the total duration of the service. For new service order lines, enter an appropriate end time or leave the field blank and click the **Default Dates** button to populate this field with the end time specified in the **Default Line Attributes** group box.

Note. Required start and end dates and times are used to populate the assigned technician's availability calendar. You cannot assign a technician to the service order line without specifying the required start and end dates and times.

Estimated Start Date

The date that work for the service order line is estimated to begin. This date is manually calculated based on technician and material availability. For new service order lines, enter an appropriate date.

Estimated End Date The date that work for the service order line is estimated to end. This date is manually calculated based on the estimated start date and the estimated hours to perform the work. For new service order lines, enter an appropriate date.

Estimated Start Time The time that work for the service order line is estimated to begin on the estimated start date. This time is manually calculated based on technician and material availability. For new service order lines, enter an appropriate time.

Estimated End Time The time that work for the service order line is estimated to end on the estimated end date. This time is manually calculated based on the estimated start date, the estimated start time, and the estimated hours to perform the work. For new service order lines, enter an appropriate time.

Estimated Hours The estimated number of hours required to perform the work on the service order line. The system populates this field with the estimated duration of the activity defined either on the Service Activities page, if the activity was defined as part of the service, or on the Service Activity Code page, if the activity is specified on a manually added service order line. You can override this value as necessary.

The Service Activities page and the Service Activity Code page are documented earlier in this chapter.

Actual Start Date The date that the work on the service order line actually began. If this field is blank when the service order line status is set to ***Open - On Site,*** the system automatically sets the value to the current date.

Actual Start Time The time the work on the service order line actually began on the actual start date. If this field is blank when the service order line status is set to ***Open - On Site,*** the system automatically sets the value to the current time.

Actual End Date The date that the work on the service order line actually ended. If this field is blank when the service order line status is set to ***Completed,*** the system automatically sets the value to the current date.

Actual End Time The time that the work on the service order line actually ended on the actual end date. If this field is blank when the service order line status is set to ***Completed,*** the system automatically sets the value to the current time.

Total Time The total time required to perform the work on the service line in hours. Enter an appropriate value based on the actual start and end dates and times.

Comments Notes pertaining to the service order line.

Go To

Each service order line offers three **Go To** options to record material, time, and expense information for the line. If the service order line requires approval, these links are not available.

Manage Material Click this link to access the Manage Material page, where you can view the material required to perform the work, order additional material if necessary, and record material receipt and usage for the service order line.

For more information about the processes initiated from the Manage Material page, see the Managing Service Order Material Requirements chapter.

Manage Time Click this link to access the Manage Time page, where you can record the time spent performing the work on the service order line.

For more information about recording labor time, see Tracking Time Spent on Service Orders and Cases in *PeopleSoft CRM Application Fundamentals PeopleBook.*

Manage Expenses Click this link to access the Manage Expenses page, where you can record expenses associated with performing the work for the service order line.

For more information about recording expenses, see the Tracking Expenses Associated With a Service Order chapter.

Assignment Search Fields

The system sets the assigned provider group and technician for each service line using the information in the **Default Line Attributes** group box. However, if no default information is defined or if you manually delete the default values for the service line, you can perform an assignment search for a specific service line.

Provider Group Name The name of the provider group that will perform the requested service work. This field is initially populated with the provider group listed in the **Default Line Attributes** group box. Provider groups must first be established on the Provider Group Definition page.

Suggest Group Click this link to select from a subset of provider groups on the Provider Group List page that are associated with the region derived from information on the service order.

Suggest Technician Click this link to select from a ranked list of qualified, available technicians on the Candidate List page. You must first select a provider group before you can generate a candidate list. You can select one or more candidates from the list. The system populates the first blank rows in the **Assignments** grid with the provider group name and the name of the provider group members that you select.

Note. Assignment selections made in the Default Line Attributes section of the service order are used only for defaulting purposes. Workers assignments are made at the service order line.

For more information about provider groups and group members, see Setting Up and Maintaining Provider Groups and Group Members in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

For more information about technician searches, see Setting Up and Performing Task Assignment Searches in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Assignments

The **Assignments** grid lists the technicians that have been assigned to perform the work on the service order line. If necessary, you can assign multiple technicians to perform the work from the same or from different provider groups.

Provider Group Name The identification of the provider group that will perform the work on the service line. Provider groups must first be established on the Provider Group Definition page.

Member Name The name of the provider group member who will perform the work on the service line. To add a group member, use the last name, first name format for data entry. Group members must first be defined on the Provider Group Definition page or the Group Member page.

Lead Tech (lead technician) Indicates whether the group member listed in the **Member Name** field of the row is the technician responsible for the service order line. By default, the first technician associated to the line is the lead technician.

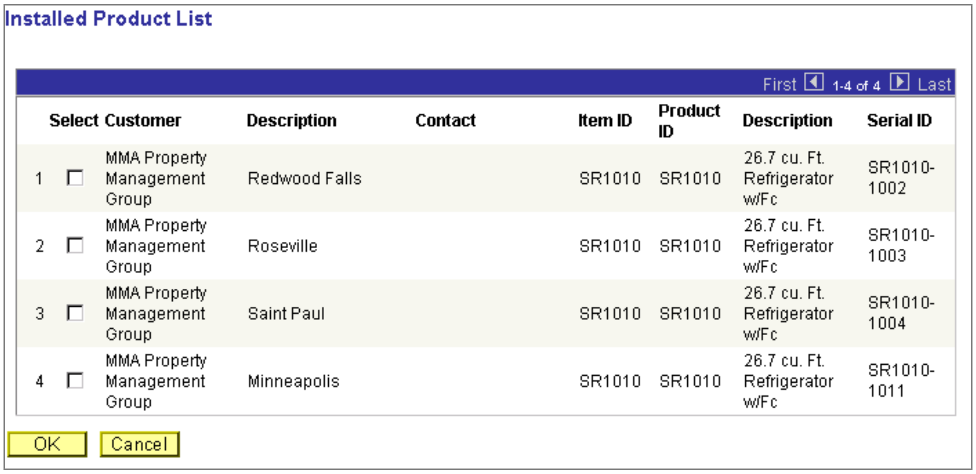
Note. Inventory transactions initiated from the Manage Material page for the service order line increase and decrease the storage locations in an inventory business unit that have been associated with the service order line's lead technician. Storage locations are associated with technicians on the Storage Locations page of the Worker component.

For more information about associated technicians with inventory storage locations, see the Defining Inventory Storage Locations for Technicians chapter. **For more information** about the processes initiated from the Manage Material page, see the Managing Service Order Material Requirements chapter.

The **Entered By** field indicates the user ID of the person who originally created the service order and the **Date** that the service order was saved. The **Last Modified** field displays a time stamp indicating when the service order was updated and the user ID of the person who made the change.

Installed Product List Page

Usage	Use the Installed Product List page to select the applicable installed product record when multiple records match the serial ID or product ID selected on the Service Order page. **For more information** about installed product records, see Tracking Installed Products in the *PeopleSoft CRM Application Fundamentals PeopleBook.*
Object Name	RF_SO_PROD_SEC
Navigation	Click the Lookup prompt button next to the Serial Number field or the Product field on the Service Order page or My Service Order page and select a value. The system displays the Installed Product List page when multiple installed product records match the serial ID or product ID that you selected. The Service Order page is documented earlier in this chapter. **For more information** about the My Service Order page, see the Working With My Service Orders chapter.



Installed Product List

First 1-4 of 4 Last

	Select	Customer	Description	Contact	Item ID	Product ID	Description	Serial ID
1	☐	MMA Property Management Group	Redwood Falls		SR1010	SR1010	26.7 cu. Ft. Refrigerator w/Fc	SR1010-1002
2	☐	MMA Property Management Group	Roseville		SR1010	SR1010	26.7 cu. Ft. Refrigerator w/Fc	SR1010-1003
3	☐	MMA Property Management Group	Saint Paul		SR1010	SR1010	26.7 cu. Ft. Refrigerator w/Fc	SR1010-1004
4	☐	MMA Property Management Group	Minneapolis		SR1010	SR1010	26.7 cu. Ft. Refrigerator w/Fc	SR1010-1011

OK Cancel

Installed Product List page

The grid lists all of the installed product records that matched the serial ID or product ID selected on the Service Order page.

Select Indicates the row that applies to your service order. Select the check box of the applicable row and click **OK** to return to the Service Order page. The system populates the fields on the service order with the values from the row that you select. Click **Cancel** to return to the Service Order page without making a selection.

Customer The name of the customer who owns or leases the installed product.

Description. The identification of the site defined for the customer on the Site page of the Maintain Customer component.

For more information about the Maintain Customer component, see Managing Customer Information in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Contact If a customer is listed, this is the contact name entered for the customer on the installed product record.

Item ID The identification of the item installed at the customer site.

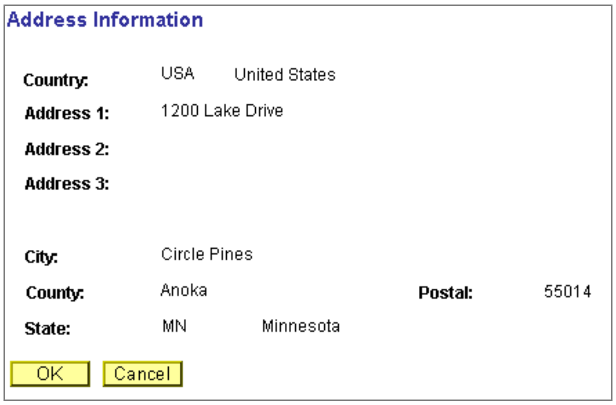
Product ID The identification of the product installed at the customer site.

Description The description associated with the product ID.

Serial ID The serial number recorded for the item on the installed product record.

Address Information Page

Usage	Use the Address Information page to view where the assigned technicians should go to perform the work on the service. This information is derived from the customer, site and address specified on the Service Order page, which is documented earlier in this chapter.
Object Name	RF_SO_ADDR_SEC
Navigation	Click the View Address link on the Service Order page.



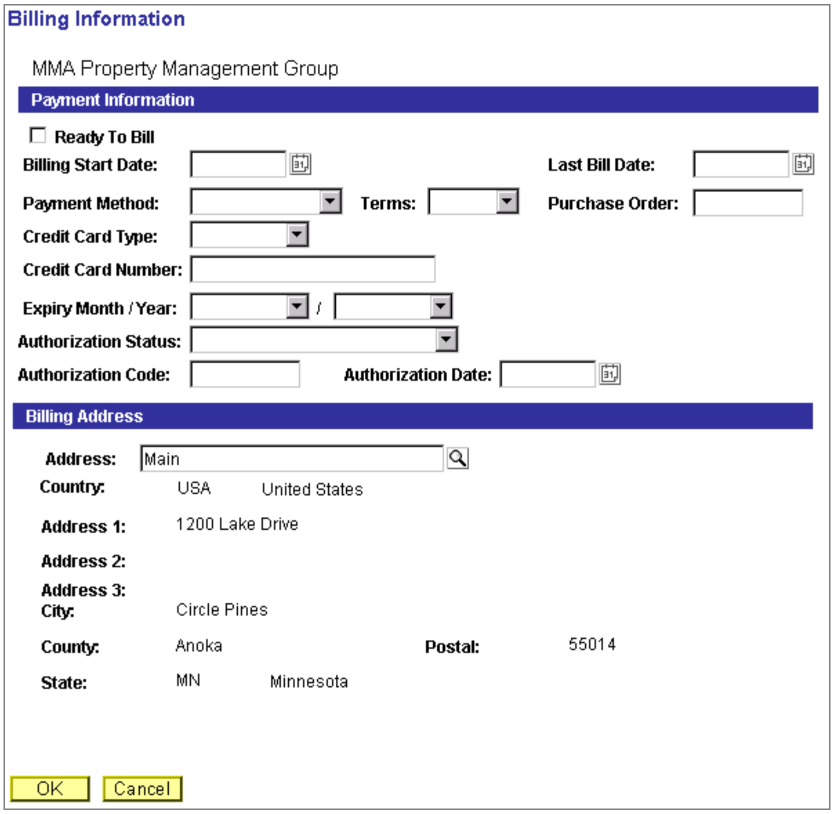
Address Information page

The system displays the address information associated with the customer, site, and address sequence number specified on the Service Order page. To modify this information for customers, you must update the customer record using the Address page of the Maintain Customer component.

For more information about the Maintain Customer component, see Managing Customer Information in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Billing Information Page

Usage	Use the Billing Information page to record, update, or view the customer's billing information for a service order. When the status of the service order at the header level is set to *Closed*, the information on this page is display-only. **Note.** As delivered, PeopleSoft CRM FieldService does not provide integration with billing systems. Billing data recorded in the system is for informational purposes only.
Object Name	RF_SO_BILL_INFO
Navigation	Click the Billing Information link on the Service Order page, which is documented earlier in this chapter.



Billing Information page

Payment Information

For informational purposes only, the fields under **Payment Information** specify information that can be used to determine when to bill the customer and the method of remittance that the customer will use.

Ready to Bill	Indicates that the service order can be submitted for processing by your billing system.
Billing Start Date	The date that the billing cycle began for this service order
Last Bill Date	The last date that an invoice was sent for this service order.
Payment Method	Indicates the customer's method of payment: ***Check, Credit Card,*** or ***Purchase Order.***
Terms	Indicates when payment is due: ***Free:*** No payment due. ***Net 30:*** Payment due within 30 days of the billing start date. ***Net 90:*** Payment due within 90 days of the billing start date.

	Pay Full: Payment due immediately.
Purchase Order	The purchase order number, if the customer's payment method is ***Purchase Order.***
Credit Card Type	The type of credit card that the customer is using, if the customer's payment method is ***Credit Card.*** As delivered, the system offers the following credit card options: ***AMEX*** (American Express), ***Diners Clu*** (Diners Club), ***Discover, EnRoute, MasterCard,*** and ***Visa.***
Credit Card Number	The credit card number provided by the customer, if the customer's payment method is ***Credit Card.***

Note. For security, the credit card information is encrypted when the page is saved. When the service order is displayed again, only the last four digits of the credit card appear.

Expire Month/Year (expiration month and year)	The month and year that the customer's credit card expires.
Authorization Status	The current state of authorization for the credit card transaction.

For more information about authorization status values, see Setting Up Credit Card Processing in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook.*

Authorization Code	The authorization code provided by the credit card company.
Authorization Date	The date that the credit card authorization was received.

Billing Address

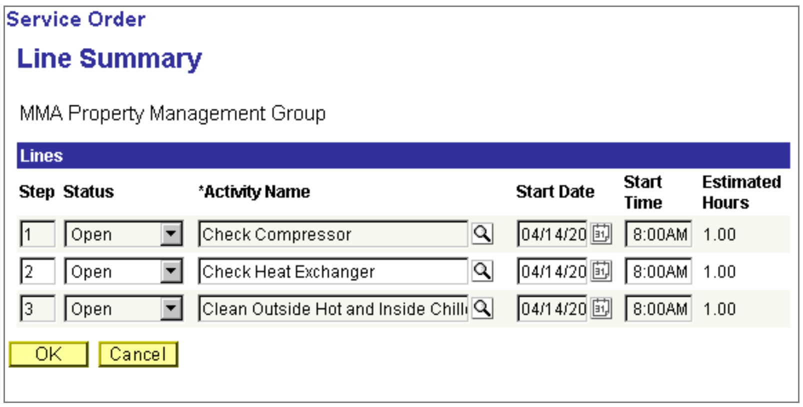
The fields under **Billing Address** display where to send the billing invoice. The billing address reflects the primary bill to address defined for the customer in the Maintain Customer component and cannot be changed on this page. If multiple billing addresses have been defined, you can specify the correct address.

For more information about the Maintain Customer component, see Managing Customer Information in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Click the **OK** button to save any changes that you made and return to the Service Order page. Click the **Cancel** button to return to the Service Order page without saving your changes.

Service Order - Line Summary Page

Usage	Use the Service Order - Line Summary page to view a summary of all lines associated with a service order.
Object Name	RF_SO_LINE_SEC
Navigation	Click the View Line Summary link on the Service Order page, which is documented earlier in this page.



Service Order - Line Summary page

The **Lines** grid lists all service order lines that have been defined for the service order. The fields on this page correspond to fields on the Service Order page.

Step The number used to sequence the service order lines. Service order lines are listed in order starting with the smallest step number. This field corresponds to the Step Number field on the Service Order page.

Status The current status of the service order line.

For more information about service order header and line status, see Understanding Service Order Status in this chapter.

Activity Name The activity to be performed for the service order line.

For more information about defining service activities, see the Setting Up Your Services chapter.

Start Date The date that work on the service order line is required to begin. This field corresponds to the Required Start Date field on the Service Order page.

Start Time The time that work on the service order line is required to begin on the required start date. This field corresponds to the Required Start Time field on the Service Order page.

Estimated Hours The estimated number of hours required to perform the work on the service order line.

Click the **OK** button to save any changes that you made and return to the Service Order page. Click the **Cancel** button to return to the Service Order page without saving your changes.

C H A P T E R 6

Managing Service Order Material Requirements

The Manage Material component in PeopleSoft CRM is a robust tool for managing the material requirements of your service order. However, the functionality of this component requires tight integration with your inventory and purchasing systems.

For more information about considerations and recommendations for implementations of PeopleSoft FieldService that include PeopleSoft Purchasing and PeopleSoft Inventory, see the Integrating With PeopleSoft Applications chapter.

The following sections describe the process flow of material management transactions initiated from the Manage Material component, detail the prerequisites setup steps for the component's functionality, and document the fields on each page of the component.

Understanding Material Management Transactions

For each line of a service order, the Manage Material page provides single-point access for the following transactions:

- Checking item balances
- Checking item availability
- Ordering material
- Checking requisition status
- Receiving material
- Recording material usage
- Recording material removed from customer sites

Note. All item transactions are based on the item's standard unit of measure.

The following sections detail the business process flows for each of these transactions.

Checking Item Balances

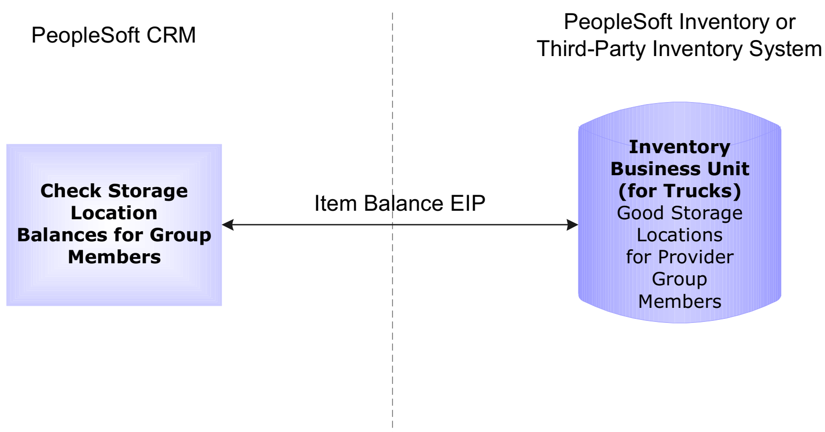
Before ordering an item for a service order line on the Manage Material page, you can check item balance information at two levels:

- Stock balances for the good truck stock storage locations that have been associated with each member of the provider group assigned to the service order line.
- Current quantity available and on-hand balances for the inventory business units that form the distribution network for your field service operations.

With this information, you can determine whether a material order is necessary and, if so, set expectations about when material will be received based on whether the required quantity is stocked in one of your distribution centers or must be ordered from an external vendor.

In PeopleSoft CRM, group members are associated with storage locations in your inventory system that represent their good and defective truck stock on the Storage Locations page of the Worker component. To check item balances for members of the assigned provider group on the Manage Material page, click the transfer button next to the item ID for the material line and select the Item Balance by Group Members link on the transfer page. The PeopleSoft CRM system uses the Item Balance EIP to retrieve balance information for the good truck stock storage locations associated with each member of the assigned provider group from PeopleSoft Inventory or your third-party inventory system. The balance information is displayed on the Item Balance by Group Member page in PeopleSoft CRM.

The following diagram illustrates the integration between PeopleSoft CRM and your inventory system that supports checking truck storage location balances.



Integration that supports checking truck storage location balances

The Item Balance EIP returns item balance information for truck stock storage locations defined in your inventory system.

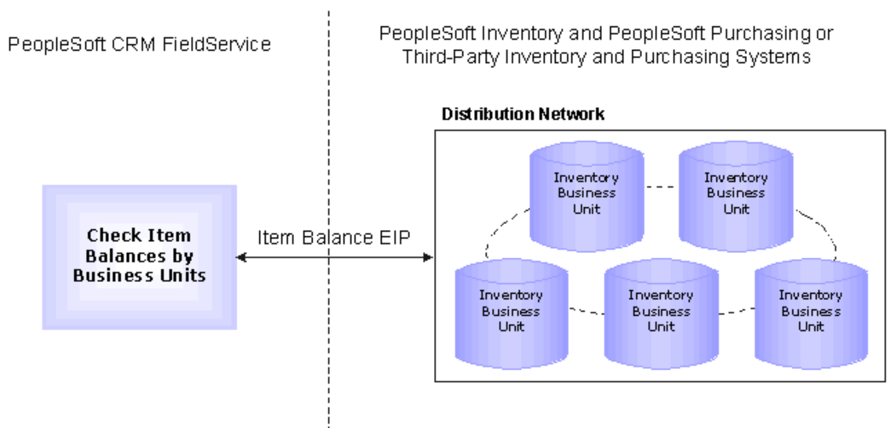
To check on-hand balances for the inventory business units included in the distribution network defined for your field service operations, click the transfer button next to the item ID for the material line and select the Item Balance by Business Unit link on the transfer page. The PeopleSoft CRM system uses the Item Balance EIP to retrieve quantity available and on-hand balance information from the appropriate inventory business units defined in PeopleSoft

Inventory or your third-party inventory system. The balance information is displayed on the Item Balance by Business Unit page in PeopleSoft CRM.

Note. When integrating with PeopleSoft Purchasing and PeopleSoft Inventory, you define a distribution network of inventory business units for each business unit in PeopleSoft CRM that can request material for service orders or as replacements or exchanges for material returns.

For more information about creating distribution networks, see the *PeopleSoft Purchasing PeopleBook.* **For more information** about considerations and recommendations for implementations of PeopleSoft FieldService that include PeopleSoft Purchasing and PeopleSoft Inventory, see the Integrating With PeopleSoft Applications chapter.

The following diagram illustrates the integration between the PeopleSoft CRM system and your inventory and purchasing system that supports checking quantity available and on-hand in your inventory distribution network.



Integration that supports checking quantity available and on-hand

The Item Balance EIP returns item balance information for the inventory business units in the distribution network that supports your field service operations.

For more information about the Item Balance EIP, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook.* **For more information** about defining truck stock storage locations, see the Defining Inventory Storage Locations for Technicians chapter. **For more information** about the Item Balance by Group Member page and the Item Balance by Business Unit page, see Checking Item Balances and Availability in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Checking Item Availability

If your PeopleSoft CRM system is integrated with PeopleSoft Inventory and you are accessing system pages through the portal using the single sign-on feature, a link to the Item/Product Availability inquiry component in PeopleSoft Inventory is available from the Manage Material component. With the Item/Product Availability inquiry component, you can confirm the current available quantity for an item, check cumulative available-to-promise (ATP) quantity for future dates, and view future supply and demand information for the item. This information enables you to set expectations about the expected receipt date for items that are being ordered to complete work on a service order line or to replace material that a customer is returning. This functionality is especially useful for items that are currently out of stock or for which demand often exceeds supply. To access the Item/Product Availability inquiry component in PeopleSoft Inventory for an item, click the transfer button next to the item ID for the material line and select the Item Availability link on the transfer page.

For more information about PeopleSoft's portal technology, see Portal Technology in the *PeopleTools PeopleBook.* **For more information** about the Item/Product Availability inquiry page in PeopleSoft Inventory, see the *PeopleSoft Inventory PeopleBook.*

Ordering Material

To order quantity of an item using the Manage Material page, enter an amount in the Quantity Ordered field of a material line. By default, the ship to address for the order is the location associated with the lead technician on the Work page of the Worker component. To modify the ship to address, click the Ship to Location link on the Manage Material page to access the Material - Ship To Address page. You can modify the ship to address until the order quantity is saved for the material line.

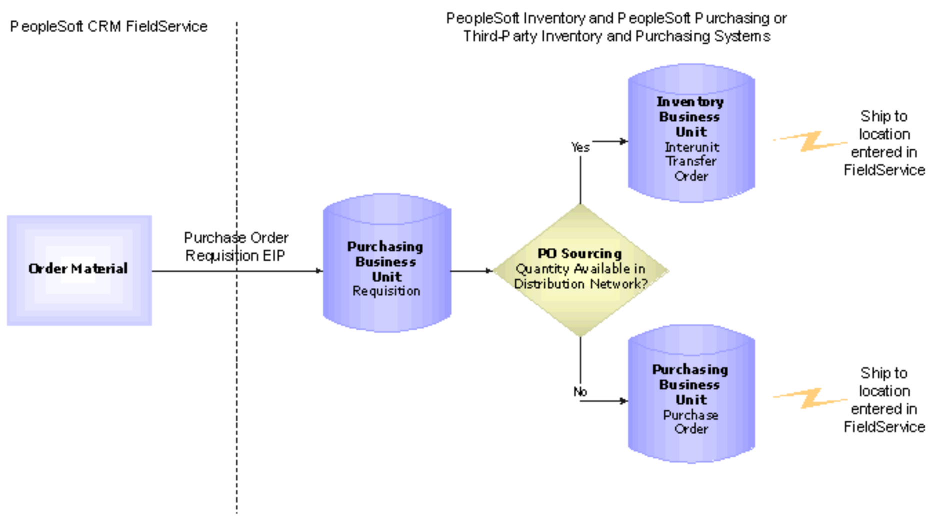
For more information about defining primary addresses for technicians in your workforce, see Managing Workers in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

When the correct ship to address for the order is entered, save the Manage Material page to initiate the order transaction. When you save the page, the PeopleSoft CRM system stages a requisition for the order quantity in PeopleSoft Purchasing or your third-party system using the Purchase Order Requisition EIP. If your implementation includes PeopleSoft Purchasing and PeopleSoft Inventory, sourcing processes in PeopleSoft Purchasing determine whether the order can be partially or completely fulfilled by an interunit transfer from the inventory business units in your distribution network or if a purchase order must be placed with an external vendor. The appropriate interunit transfer orders and purchase orders are created in the applicable systems, fulfilled by the inventory business unit or vendor, and shipped to the address specified for the material line in PeopleSoft CRM.

Note. In PeopleSoft, interunit transfers are stock transfers between inventory business units in your enterprise. One of the assumptions of the integration design supporting material orders for service order lines is that material will be transferred from one of your inventory business units to the inventory business unit in which the technician's good truck stock storage location is defined. For this reason, we recommend that you define an inventory business unit to track only truck stock storage locations. To prevent stock in the truck storage locations from being used to fulfill other material requests, the inventory business unit for trucks should not be included in any distribution networks defined in PeopleSoft Purchasing.

For more information about considerations and recommendations for implementations of PeopleSoft FieldService that include PeopleSoft Purchasing and PeopleSoft Inventory, see the Integrating With PeopleSoft Applications chapter.

The following diagram illustrates the integration between the PeopleSoft CRM system and your inventory and purchasing system that supports ordering the material required to complete work on a service order line.



Integration that supports ordering material required

The Purchase Order Requisition EIP stages requisitions for the material required to complete work on a service order line.

Note. PeopleSoft Purchasing or your third-party purchasing system handles processing of the requisitions staged by the Purchase Order Requisition EIP. In your purchasing system, you must set processing defaults for the staged requisitions and perform any required actions to complete the ordering process.

For more information about requisitions, sourcing processes, distribution networks, and purchase orders in PeopleSoft Purchasing, see the *PeopleSoft Purchasing PeopleBook.* **For more information** about interunit transfers in PeopleSoft Inventory, see the *PeopleSoft Inventory PeopleBook.* **For more information** about the Purchase Order Requisition EIP, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook.*

Checking Requisition Status

In implementations that include PeopleSoft Purchasing on the portal, you can transfer to the Requisition Workbench in PeopleSoft Purchasing to check the processing status of orders initiated from the Manage Material page. When an order is initiated from the Manage Material page, the system stages a requisition for the order in PeopleSoft Purchasing using the Purchase Order Requisition EIP and displays the requisition ID assigned to the order on the material line. Using the requisition ID as search criteria for the Requisition Workbench, you can check the status of the requisition in PeopleSoft Purchasing. The Requisition Workbench also enables you to check the status of all requisitions by requester listed on the material line. The requester is also listed on the material line displayed on the Manage Material page.

Note. In PeopleSoft CRM, you can define a default requester ID on the User Preferences - Overall Preferences page in the General Options menu. If your system integrates with PeopleSoft Purchasing, the requester ID on the requisition must be a valid user ID and requisition requester in PeopleSoft Purchasing.

For more information about defining requesters in PeopleSoft Purchasing, see the *PeopleSoft Purchasing PeopleBook*. **For more information** about the User Preference page, see Defining User Preferences in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

To transfer to the Requisition Workbench in PeopleSoft Purchasing, click the Requisition Workbench link on the Manage Material page. The system displays this link only if you are using the Manage Material page in the portal.

For more information about PeopleSoft's portal technology, see Portal Technology in the *PeopleTools PeopleBook.* **For more information** about using PeopleSoft Purchasing's Requisition Workbench component, see the *PeopleSoft Purchasing PeopleBook.*

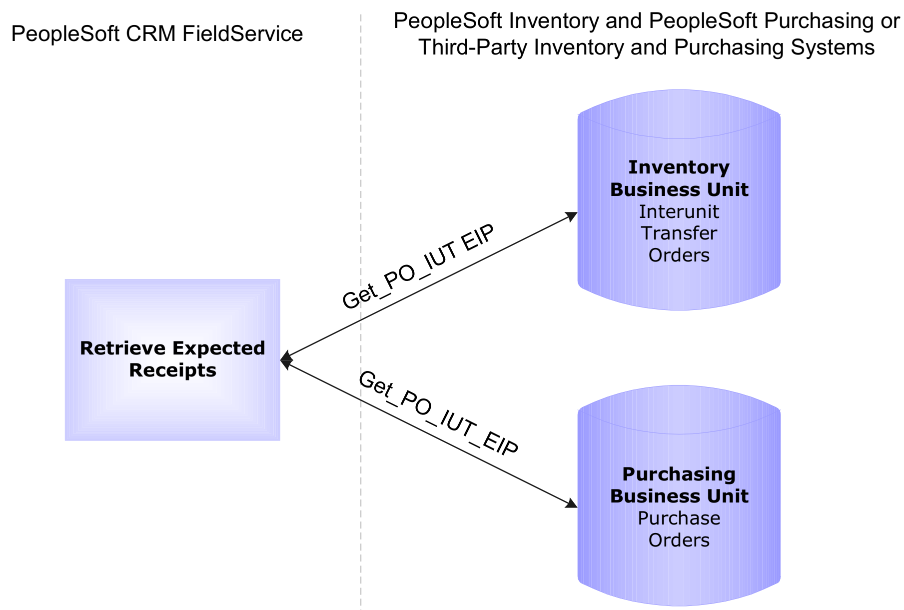
Receiving Material

When defining a field service business unit on the FieldService Definition page, you can determine whether the material orders initiated from the Manage Material page can be automatically received. In environments without automatic receiving, a technician or a dispatcher must enter receiving information for a material shipment before usage of the material can be recorded. With automatic receiving, technicians enter only usage information, from which the system automatically derives and posts the appropriate receiving transactions.

For more information about specifying automatic receiving for field service business units, see the Defining Business Units in PeopleSoft CRM FieldService chapter.

If automatic receiving is not allowed, technicians manually record receipt of ordered material in the Received grid of the Manage Material page. Once a purchase order or an interunit transfer order has been created for a requisition, you must click the Expected Receiving link to populate the Received grid with the expected receipt information. The PeopleSoft CRM system uses the Get_PO_IUT EIP to retrieve the expected receipt information for any purchase orders or interunit transfer orders created in your inventory and purchasing systems to fulfill the requested quantity on the material line.

The following diagram illustrates the integration between the PeopleSoft CRM system and your inventory and purchasing system that supports retrieving expected receipt information for any purchase orders or interunit transfer orders created in your inventory and purchasing systems to fulfill the ordered quantity on the material line.



Integration that supports retrieving expected receipt information

The Get_PO_IUT EIP retrieves expected receipt information from your inventory and purchasing systems.

You can modify the expected receipt information in the grid as necessary to reflect the actual material shipment. When you save the Manage Material page, the PeopleSoft CRM system stages the appropriate receipt transactions in your purchasing and inventory systems using the PO Receipt EIP for purchase orders and the Interunit Receipt EIP for interunit transfers.

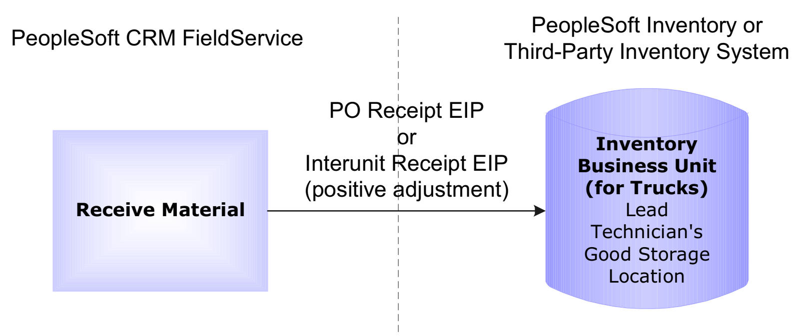
If automatic receiving is allowed, technicians enter usage information for a material shipment in the Used and Not Used grids of the Manage Material page. You must click the Expected Receiving link to populate the Used grid with expected receipt information from any purchase orders or interunit transfers created for the material line. When you save the Manage Material page, the PeopleSoft CRM system stages the appropriate receipt transactions in your purchasing or inventory systems using the PO Receipt EIP for purchase orders and the Interunit Receipt EIP for interunit transfers. The system derives the receipt quantity by adding the used and not used quantities.

Both interunit and purchasing receipt transactions are staged to your inventory system so that the quantity in the storage location associated with the lead technician's good truck stock can be incremented by the receipt quantity. If your system integrates with PeopleSoft Inventory, the system increases the quantity in the corresponding storage location when the Putaway process is run for the receipt.

Important! When integrating with Peoplesoft Inventory, you must deactivate the Flag Items for Auto-Putaway option to require a receipt transaction to be performed against all interunit receipts. When the Flag Items for Auto-Putaway option is active, the PeopleSoft Inventory system automatically sets the status of the interunit transfer to *Received* without requiring a receipt transaction. If the status of the receipt is *Received*, the PeopleSoft CRM system cannot retrieve the "expected receipt" information for the order on the Manage Material page. The Service Order component validates that all material ordered for a service order line is received before allowing the service order line to be closed. If interunit receipt information cannot be entered, the status of the service order line cannot be set to *Closed.*

For more information about the Flag Items for Auto-Putaway option, see the *PeopleSoft Inventory PeopleBook.*

The following diagram illustrates the integration between the PeopleSoft CRM system and your inventory system that supports recording receipt of material shipments ordered to complete work on a service order line.



Integration that supports recording receipt of material shipments

The Interunit Receipt EIP and PO Receipt EIP stage receipt transactions in your inventory system so that the quantity balance in the storage location associated with the lead technician's good truck stock can be increased by the quantity received.

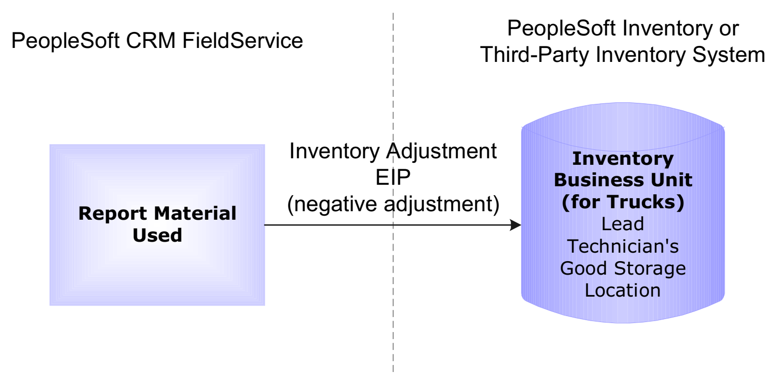
For more information about the Get_PO_IUT EIP, the PO Receipt EIP and the Interunit Receipt EIP, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook.*

Recording Material Usage

Technicians record the quantity of material used to perform the work for a service order line in the Used grid of the Manage Material page. When an item quantity is entered in the Used grid and saved, the PeopleSoft CRM system publishes the Inventory Adjustment EIP to stage negative adjustment transactions in your inventory system. Your inventory system processes the staged adjustment transactions to decrease the quantity in the storage location associated with the lead technician’s good truck stock by the usage quantity. If your system integrates with PeopleSoft Inventory, the system decreases the quantity in the lead technician’s good truck stock storage location when the Inventory Adjustment process is run for the staged transaction.

The system populates the Used grid with the material line item or the item recorded as received, if different from the material line item. You can modify the default item ID value as necessary. In field service business units that allow automatic receiving, technicians also record the portion of the material shipment that was not required to complete the work on the service order line in the Not Used grid of the Manage Material page. The system adds the used and unused quantity to derive the receipt quantity and increases the lead technician’s good storage location in PeopleSoft Inventory or your third-party inventory system. The system displays the Not Used grid on the Manage Material page only when the Automatic Receiving option is set for the field service business unit on the FieldService Definition page.

The following diagram illustrates the adjustment transaction that accounts for material usage.



Adjustment transaction

The Inventory Adjustment EIP stages negative adjustment transactions in your inventory system to reflect the material used to complete work on a service order.

Note. Because the order of positive and negative adjustment transactions to inventory storage locations cannot be predicted, we recommend that you set up your inventory system to allow transactions to drive inventory quantity balances negative.

For more information about enabling negative quantity balances in PeopleSoft Inventory, see the *PeopleSoft Inventory PeopleBook.* **For more information** about considerations and recommendations for implementations of PeopleSoft FieldService that include PeopleSoft Purchasing and PeopleSoft Inventory, see the Integrating With PeopleSoft Applications chapter. **For more information** about setting the Automatic Receiving option for field service business units, see the Defining Business Units in PeopleSoft CRM FieldService chapter. **For more information** about defining good and defective storage locations for technicians, see the Defining Inventory Storage Locations for Technicians chapter. **For more information** about the Inventory Adjustment EIP, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook.*

Recording Material Removed From Customer Sites

Technicians record material that they remove from a customer's site in the Removed grid of the Manage Material page. When an item quantity is entered in the Removed grid and the page is saved, the PeopleSoft CRM system publishes the Inventory Adjustment EIP to stage positive adjustment transactions in your inventory system. Your inventory system processes the staged adjustment transactions to increase the quantity in the storage location associated with the lead technician's defective truck stock by the removal quantity. If your system integrates with PeopleSoft Inventory, the system increases the quantity in the lead technician's defective truck stock storage location when the Inventory Adjustment process is run for the staged transaction.

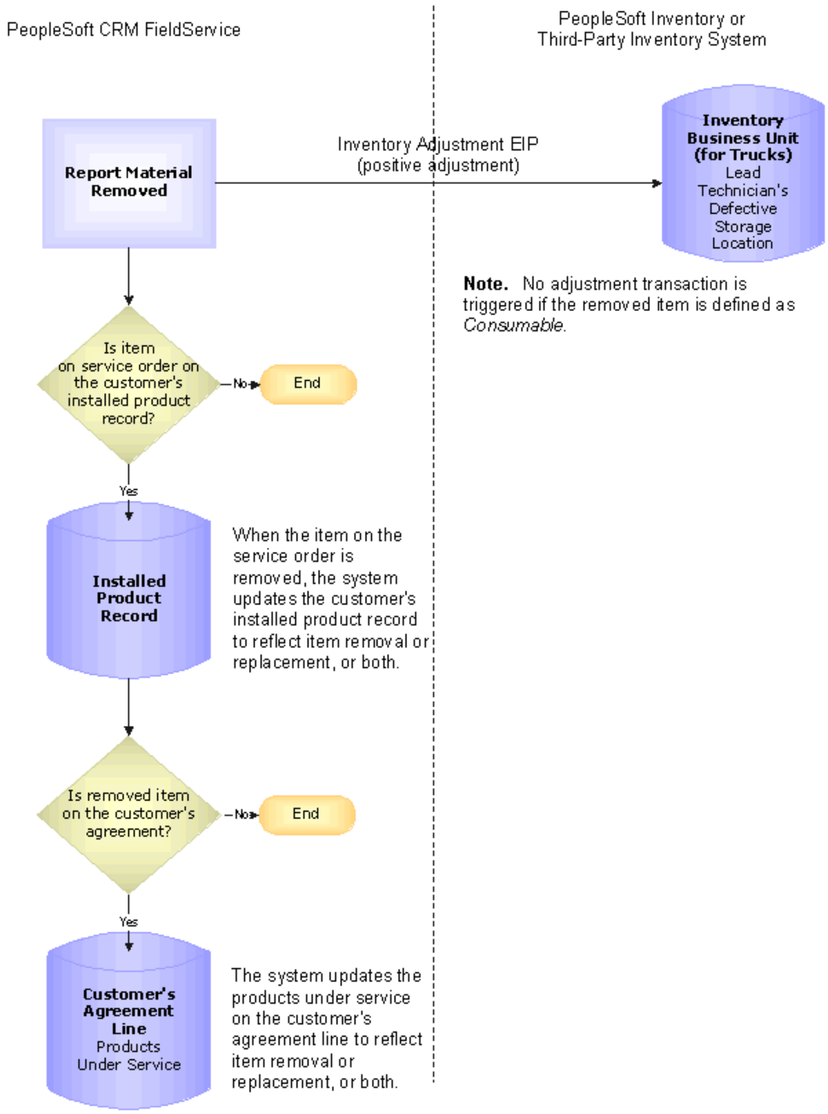
If the removed item is the same as the one specified on the service order header, saving the item quantity in the Removed grid also triggers the PeopleSoft CRM system to check the installed product records for the customer on the service order line. If the removed item matches an installed item, the system updates the customer's installed product record to reflect the removal. The system sets the installed product record for the removed item to *Uninstalled* and inserts a new installed product record for the replacement item with a status of *Installed.*

If the system updates the installed product record, it also checks to see if any of the customer's agreement lines reference the removed item as a product under service. If the removed item is referenced as a product under service, the system removes the obsolete line from the product under service record and inserts a new line representing the replacement item.

If the removed item is defined as a consumable item on the Item Definition page, no adjustment transaction is triggered. It is expected that the consumable item is thrown away rather than returned to the truck. However, you should record removal of consumable items in the Removed grid so that the system can make the appropriate changes to the customer's installed product record and the products under service on the associated agreement line.

For more information about defining consumable items on the Item Definition page, see Defining Items in the *PeopleSoft CRM Application Fundamentals PeopleBook.* **For more information** about installed product records, see Tracking Installed Products in the *PeopleSoft CRM Application Fundamentals PeopleBook.* **For more information** about listing products under service on an agreement line, see Setting Up and Managing Agreements and Warranties in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

The following diagram illustrates the integration between the PeopleSoft CRM system and your inventory and purchasing system that supports recording the removal of material from a customer site.



Integration that supports recording the removal of material from a customer site

The inventory system uses the adjustment transactions staged by the Inventory Adjustment EIP to increase the quantity balance of the lead technician's defective truck stock storage location to reflect material removed from a customer site.

Your business processes dictates how removed material in a technician's defective storage location should be handled. Typically, this stock is transferred to a distribution center's inspection storage location using the inventory system. At the distribution center's inspection location a decision is made to scrap, recycle, repair, or restock the item in available inventory stores.

For more information about the Inventory Adjustment EIP, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook.*

Using the Manage Material Component

Before you can use the Manage Material component, set up your PeopleSoft CRM system and your inventory and purchasing systems to support its functionality. Successful implementation of the Manage Material component depends on several prerequisite setup steps.

For more information about considerations and recommendations for implementations of PeopleSoft CRM FieldService that include PeopleSoft Purchasing and PeopleSoft Inventory, see the Integrating With PeopleSoft Applications chapter.

To implement the Manage Material component:

1. Define inventory and purchasing business units.

   Define business units in your inventory system that represent your field service trucks and your distribution warehouses. Define the purchasing business units that will process requisitions for materials required to complete service orders.

   Activate the Business Unit EIP to automatically insert business units defined in your inventory system and purchasing system in the BUSINESS_UNIT_FS table in PeopleSoft CRM. This enables you to reference the appropriate inventory business unit in PeopleSoft CRM for your material management transactions.

   For more information about the Business Unit EIP, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook.*

2. Synchronize item masters between PeopleSoft CRM and your purchasing and inventory systems.

   Activate the Item Master - CRM EIP to populate your item tables in PeopleSoft CRM with the master item data in your inventory and purchasing systems. Alternatively, you can manually enter item information in both PeopleSoft CRM and your inventory system.

   For more information about the Item Master - CRM EIP, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook*. **For more information** about item definition in PeopleSoft CRM, see Defining Items in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

3. Define storage locations in your inventory system representing truck locations.

   In your inventory system, first define inventory business units with storage locations that represent good and defective storage locations on your field service trucks. In PeopleSoft CRM, associate one good truck stock location and one defective truck stock location with each member of your field service provider groups using the Storage Locations page of the Worker component.

For more information about defining truck stock storage locations, see the Defining Inventory Storage Locations for Technicians chapter.

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4. Define requisition processing defaults in your purchasing system.

   In your third-party systems, define how requisitions initiated from the Manage Material page will be processed. If your system integrates with PeopleSoft Purchasing, you must define your field service business units as a valid source of requisitions in PeopleSoft Supply Chain Management. Using the Requisition Loader Defaults component in PeopleSoft Supply Chain Management, you define each field service business unit as a Loader BU and establish processing defaults for requisitions staged by the field service business unit, including the purchasing business unit in PeopleSoft Purchasing that will process the requisitions.

   When defining procurement options in PeopleSoft Supply Chain Management, you can associated the field service business unit with an appropriate distribution network on the Ship To Locations page. Sourcing processes in PeopleSoft Purchasing can be configured to check available quantity first in the distribution network before creating a purchase order with an external vendor. If quantity exists in one of the inventory business units in the defined distribution network, an interunit transfer is created to fulfill the requisition. Inventory business units representing field service trucks should not be included in distribution networks.

For more information about requisitions, sourcing processes, distribution networks, and purchase orders in PeopleSoft Purchasing, see the *PeopleSoft Purchasing PeopleBook* and the *PeopleSoft Applications Fundamentals for FSCM PeopleBook*. **For more information** about interunit transfers in PeopleSoft Inventory, see the *PeopleSoft Inventory PeopleBook.*

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5. Define requesters in PeopleSoft CRM and your purchasing system.

   The requester ID represents a person or entity that initiates a requisition request. For requisitions initiated from the Manage Material page, the system populates the Requester field with the default requester ID defined on the User Preferences - Overall Preferences page. You can modify the requester ID as necessary. However, if your system integrates with PeopleSoft Purchasing, the requester ID that you select for the requisition created in PeopleSoft CRM must be a valid user ID and requisition requester in PeopleSoft Purchasing.

Requesters are established on the Requester Setup page in PeopleSoft Supply Chain Management in the Structure Procurement Options menu. **For more information** about establishing valid requesters in PeopleSoft Supply Chain Management, see the *PeopleSoft Applications Fundamentals for FSCM PeopleBook.*

6. Set receiving options for the field service business units.

   When defining a field service business unit on the FieldService Definition page, you can determine whether the material orders initiated from the Manage Material page can be automatically received. In environments without automatic receiving, technicians must enter receiving information for a material shipment before they can record usage of the material. With automatic receiving, technicians enter only usage information—the quantity used and the quantity not used—from which the system automatically derives and posts the appropriate receiving transactions. Select the automatic receiving option that best meets your business practices. Neither option offers significant data entry advantages and the material management transactions produced in both automatic and manual receiving environments are identical.

For more information about specifying automatic receiving for field service business units, see the Defining Business Units in PeopleSoft CRM FieldService chapter.

7. Activate the EIP messages associated with the material management transactions.

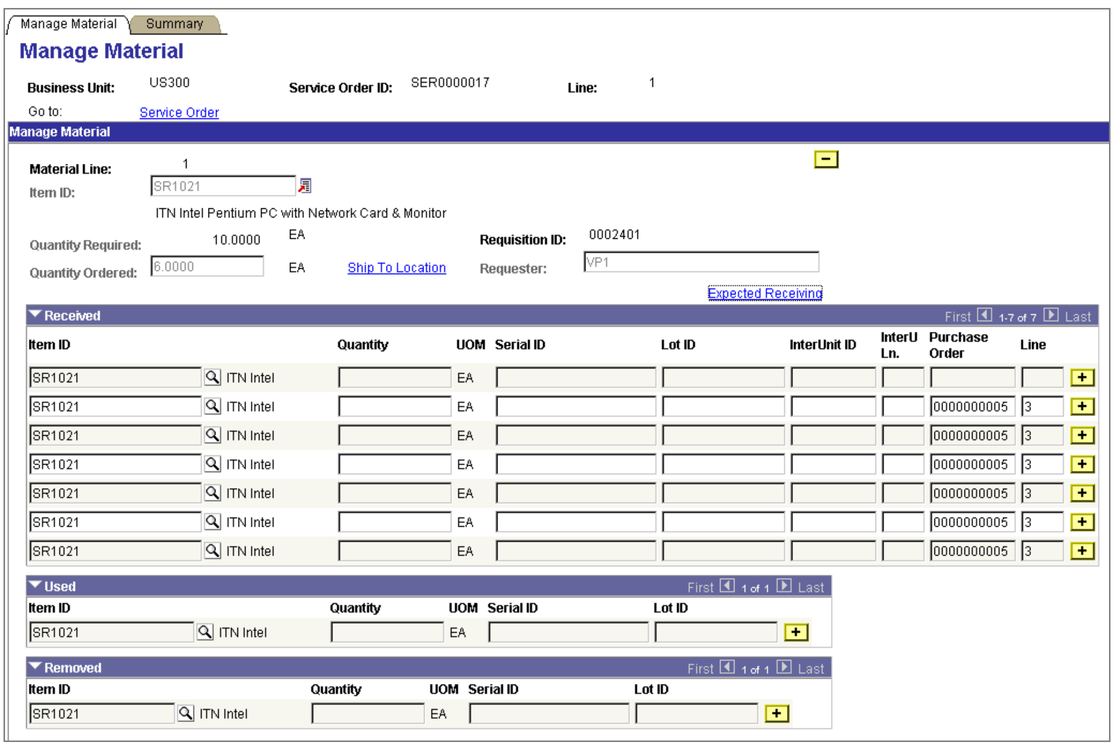
   As appropriate for the specific material management transaction, activate the following EIP messages in your PeopleSoft CRM, purchasing, and inventory systems:

   - Business Unit EIP
   - Item Balance EIP
   - Get_PO_IUT EIP
   - Purchase Order Requisition EIP
   - Inventory Adjustment EIP
   - Interunit Receiving EIP
   - PO Receipt EIP

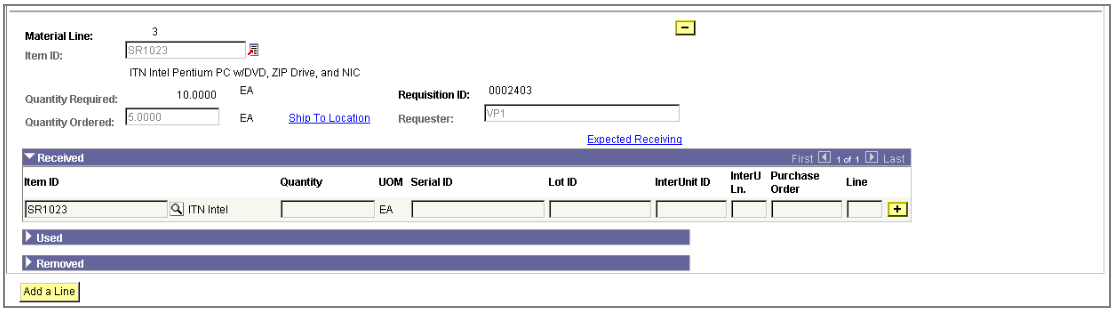
For more information about each of the material management EIPs, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook.*

Manage Material Page

Usage	Use the Manage Material page to request materials required to perform a service order line, receive the requested material to a truck storage location, report material usage, indicate material that is not used, and record what material was removed from a customer's site. **For more information** about the process flows for each of these material management transactions, see Understanding Material Management Transactions in this chapter.
Object Name	RF_MANAGE_MATERIAL
Navigation	• **Manage FieldService, Maintain Service Orders, Use, Manage Material** • Click the Manage Material link on the Service Order page. • Click the Materials link on the My Service Order page. **For more information** about the Service Order page, see the Creating and Managing Service Orders chapter. **For more information** about the My Service Order page, see the Working With My Service Orders chapter.



Manage Material page (1 of 2)



Manage Material page (2 of 2)

The system displays the **Business Unit** where the service order originated, and the **Service Order ID** and **Line.** When a new service order line is saved, the system generates a material header sequence number using the material listed in the service or service activity as default information.

The **Service Order** link enables you to return the service order to which the material management record is associated.

Manage Material

The system populates the **Manage Material** scroll area with a row for each item defined for a service or service activity. If the service is defined with service activities, the system populates the manage material record with the material defined for the service activities. If no activities are defined for the service, the system populates the manage material record with the material defined for the service. Each item defined for the service or service activity becomes a material line on the manage material record. You can add or delete manage material lines as necessary. If no items were associated with the service or service activity or if other items are required to perform the activity, click the **Add a Line** button at the bottom of the page to insert additional material line rows.

For more information abut defining materials for services or service activities, see the Setting Up Your Services chapter.

The **Manage Material** scroll area displays the following information for each item:

Material Line The line number of the material management record. The system automatically generates a line number for each line added to the record.

Item ID The identification of the item required to perform the service activity. The system displays the description of the selected item below this field. Items must be established in your system tables using the Item Definition page or the Item Master - CRM EIP.

Click the transfer button next to the item ID to access a transfer page with the following links:

- Item Definition: Click this link to access the Item Definition page, where your can view the item's definition in PeopleSoft CRM.
- Item Substitutes: Click this link to access the Substitutes page, where you can view any substitutions defined for the item in PeopleSoft CRM.
- Item Balance by Group Members: Click this link to access the Item Balance by Group Members page, where you can view the item quantity balance in the good truck stock storage location associated with each member of the provider group assigned to the service order line.
- Item Balance by Business Units: Click this link to access the Item Balance by Business Units page, where you can view the quantity available and quantity on-hand for each of the inventory business units in the distribution network defined for your field service operations.
- Item Availability: Click this link to access the Item/Product Availability inquiry page in PeopleSoft Inventory, where you can check the current quantity available for an item or product as well as the projected future availability. This link appears only if your implementation includes PeopleSoft Inventory and you have logged on to the portal using the single sign-on feature.

For more information about the Item Definition page and the Substitutes page, see Defining Items in the *PeopleSoft CRM Application Fundamentals PeopleBook.* **For more information** about the Item Balance by Business Unit page, see Checking Item Balances and Availability in the *PeopleSoft CRM Application Fundamentals PeopleBook.* **For more information** about the Item/Product Availability inquiry page in PeopleSoft Inventory, see the *PeopleSoft Inventory PeopleBook.* **For more information** about PeopleSoft's portal technology, see Portal Technology in the *PeopleTools PeopleBook.*

Quantity Required The amount of the item in the item's standard unit of measure that is required to perform the service or service activity as defined on the pages of the Service component.

For more information about the defining material requirements for your services, see the Setting Up Your Services chapter.

Quantity Ordered

The amount of the item requested in the item's standard unit of measure. Enter the amount that you need to perform the activity. To generate the requisition, the system publishes an application message with the Purchase Order Requisition EIP to PeopleSoft Purchasing or your third-party purchasing system when the page is saved.

Note. Because saving the page triggers creation of a requisition for the order quantity in PeopleSoft Purchasing or your third-party system, the quantity entered in this field cannot be modified after the page is saved. Any changes to the order quantity must be made in your purchasing system.

For more information about the material ordering process on the Manage Material page, see Understanding Material Management Transactions in this chapter.

Ship To Location

Click this link to access the Material - Ship To Address page, where you can view and modify the address where the ordered material will be shipped. By default, the ship to address is the lead technician's primary work location defined on the Work page of the Worker component. You can modify the ship to address as necessary until an order quantity has been saved for the material line.

Note. After the quantity ordered has been saved, you cannot modify the ship to address in your PeopleSoft CRM system. After the Purchase Order Requisition EIP has been published, you can change ship to address information only in your purchasing or inventory systems.

The Material - Ship To Address page is documented later in this chapter. **For more information** about the Worker component, see Managing Workers in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Requisition ID

The identification of the requisition created in PeopleSoft Purchasing or your third-party purchasing system to fulfill the requested order quantity.

If you have implemented PeopleSoft Purchasing, you can use the requisition ID information to check the status of the requisition using the Requisition Workbench. The requisition ID is a concatenation of the material header sequence number and the material line number.

Requester

The ID of the person or entity associated with the requisition request. The system populates this value with the default requester ID defined on the User Preferences - Overall Preferences page. You can modify the requester ID as necessary. If you have implemented PeopleSoft Purchasing, you can use the requester ID to check the status of all the requisitions entered by a specific person using the Requisition Workbench.

Important! If your system integrates with PeopleSoft Purchasing, the requester ID must be a valid user ID and requisition requester in PeopleSoft Purchasing. Requesters are established on the Requester Setup page in PeopleSoft Supply Chain Management in the Structure Procurement Options menu.

For more information about establishing valid requesters in PeopleSoft Supply Chain Management, see the *PeopleSoft Applications Fundamentals for FSCM PeopleBook.* **For more information** about the Requisition Workbench in PeopleSoft Purchasing, see the *PeopleSoft Purchasing PeopleBook.*

Received Grid

If automatic receiving has not been enabled for the business unit on the FieldService Definition page, the system displays the **Received** grid. To record receipt of any quantity ordered for the material line, click the **Expected Receiving** link to populate the grid with expected receipt information for the purchase orders or interunit transfers created for the order quantity in PeopleSoft Purchasing and PeopleSoft Inventory or your third-party inventory and purchasing systems.

The system retrieves the expected receipt information using the Get_PO_IUT EIP and populates the **Item ID** and the item's standard **UOM** (unit of measure). You must manually enter the receipt **Quantity.** For interunit receipts, the system populates the **Serial ID** and **Lot ID,** if applicable, and the **InterUnit ID** and **InterU Ln** (interunit line) number. For purchase order receipts, the system populates the **Purchase Order** number and purchase order **Line** number. You must manually enter the **Serial ID** and **Lot ID** for purchase order receipts as applicable.

Note. Because the Get_PO_IUT EIP populates other information in your system that is not displayed on the grid, you must click the **Expected Receiving** link before you can enter the interunit or purchase order receipt.

Over-receiving is prevented by the system validation. After you successfully save the information in the **Received** grid, any changes to the receiving information must be made in your purchasing and inventory system.

For more information about receiving transactions initiated from the Manage Material component, see Receiving Material in this chapter.

Used Grid

The **Used** grid lists the quantity of the item used to complete the work on the service order line. The items recorded in this grid may be different than the items that were originally required or ordered for the material line. To record usage of material from the technician's good location, enter the **Item ID** and **Quantity** used in the standard **UOM** (unit of measure), plus the **Serial ID** and **Lot ID** information as applicable. When an item quantity is entered in the **Used** grid and saved, the PeopleSoft CRM system publishes the Inventory Adjustment EIP to stage negative adjustment transactions in your inventory system. Your inventory system processes the staged adjustment transactions to decrease the quantity in the storage location associated with the lead technician's good truck stock by the usage quantity.

In automatic receiving environments, you must click the **Expected Receiving** link to populate the grid with expected receipt information from any purchase orders or interunit transfers created for the material line. As with the **Received** grid in manual receiving environments, the system retrieves the expected receipt information using the Get_PO_IUT EIP and populates the **Item ID** and the item's standard **UOM** (unit of measure). You must manually enter the receipt **Quantity.** For interunit receipts, the system populates the **Serial ID** and **Lot ID,** if applicable, and the **InterUnit ID** and **InterU Ln** (interunit line) number. For purchase order receipts, the system populates the **Purchase Order** number and purchase order **Line** number. You must manually enter the **Serial ID** and **Lot ID** for purchase order receipts as applicable. If only a portion of the received quantity was used in automatic receiving environments, you must report the unused portion of the receipt in the **Not Used** grid manually. If the actual shipment fails to match the any of the expected receipt information, you can modify the information in the grid as necessary before saving the page.

For more information about material usage transactions initiated from the Manage Material component, see Recording Material Usage in this chapter.

Not Used Grid

If field service business units allow automatic receiving, you must also record the portion of the material received that was not required to complete the work on the service order line in the **Not Used** grid. For any unused quantity of a material shipment, enter a line in the grid matching all the receipt information defined for the item in the **Used** grid. In the **Quantity** field of the **Not Used** grid, enter the amount of the shipped quantity that remains. The system adds this quantity to the quantity in the **Used** quantity to calculate the receipt quantity for the receiving transactions that it stages to your inventory and purchasing systems.

Note. Only rows with quantity greater than zero trigger the publishing of transaction messages for your purchasing and inventory systems. If you used all of the shipment quantity while performing the work on the service order line, you do not need to record a not used quantity of zero for the item.

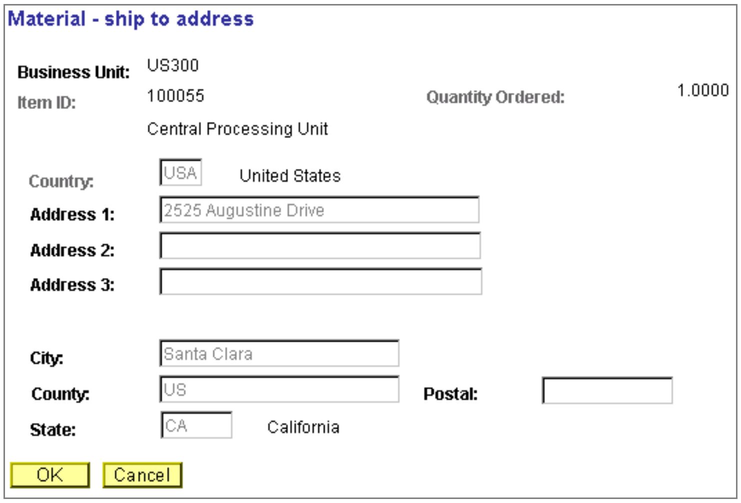
Removed Grid

The **Removed** grid lists the quantity of the item that was removed from the customer's site during the performance of the service activity. Enter the **Item ID** and **Quantity** removed in the standard **UOM** (unit of measure), plus the **Serial ID** and **Lot ID** information as applicable. When an item quantity is entered in the **Removed** grid and the page is saved, the PeopleSoft CRM system publishes the Inventory Adjustment EIP to stage positive adjustment transactions in your inventory system. Your inventory system processes the staged adjustment transactions to increase the quantity in the storage location associated with the lead technician's defective truck stock by the removal quantity.

For more information about material removal transactions initiated from the Manage Material component, see Recording Material Removed from Customer Sites in this chapter.

Material - Ship To Address Page

Usage	Use the Material - Ship To Address page to view and modify the address where the material ordered on the Manage Material page will be shipped. You can modify the address information until an order quantity has been saved on the Manage Material page.
Object Name	RF_MANAGE_MAT_ADD
Navigation	Click the Ship To Location link on the Manage Material page, which is documented earlier in this chapter.



Material - Ship To Address page

The system displays the **Business Unit, Item ID,** and **Quantity Ordered** from the Manage Material page and populates the work location address fields with the information defined for the lead technician on the Work page of the Worker component.

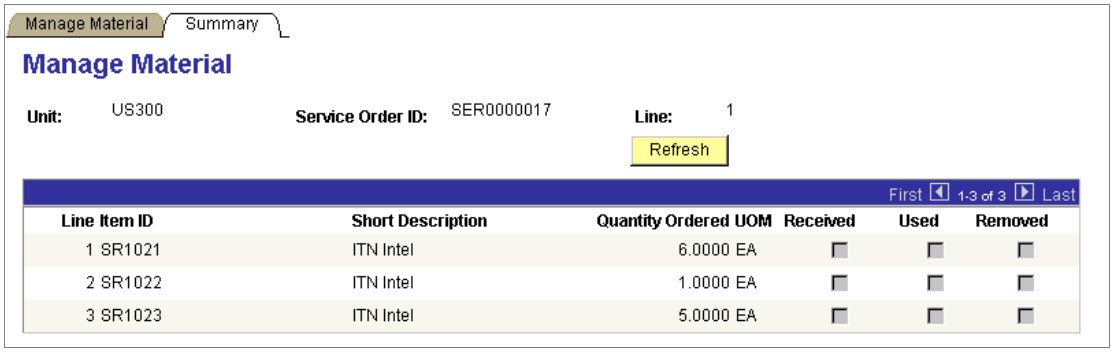
For more information about worker definition, see Managing Workers in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

You can modify the ship to address information for each material line on the Manage Material page as necessary until quantity is ordered for the line. After an order quantity has been entered on the material line and the Manage Material page has been saved, the ship to address information can only be viewed, not updated.

Click **OK** to save any changes that you made and return to the Manage Material page. Click **Cancel** to return to the Manage Material page without saving your changes.

Summary Page

Usage	Use the Summary page to view the summary of the material management transactions for each item associated with a service order line.
Object Name	RF_MAT_SUMMARY
Navigation	• **Manage FieldService, Maintain Service Orders, Use, Manage Material** • Click the Manage Material link on the Service Order page. • Click the Materials link on the My Service Order page. **For more information** about the Service Order page, see the Creating and Managing Service Orders chapter. **For more information** about the My Service Order page, see the Working With My Service Orders chapter.
Access Requirements	Click the Summary tab.



Summary page

The system displays the Business **Unit** and **Service Order ID** from the Manage Material page. To populate the grid with the most recent material status information, click the **Refresh** button.

In the grid, the system indicates whether any quantity of an item has been recorded as ordered, received, used, not used, or removed.

Line	The line number of the material management record.
Item ID	The identification of the item required to perform the service order line.
Short Description	The short description established for the item.
Quantity Ordered	The amount of the item requested.
UOM (unit of measure)	The item's standard unit of measure, which is used to record item quantity for all ordering, receiving, and material usage activities.
Received	Indicates whether any quantity of the material line has been received. This check box appears only if automatic receiving is enabled for the business unit on the FieldService Definition page.
Used	Indicates whether any quantity on the material line has been consumed or installed at the customer's site.
Not Used	Indicates whether any quantity has been recorded as not used in those business units for which automatic receiving has been enabled on the FieldService Definition page. This check box appears only in automatic receiving environments.
Removed	Indicates whether any quantity on the material line has been recorded as removed from the customer's site.

The **Go to** link enables you to return to the **Service Order** to which the material management record is associated.

CHAPTER 7

Tracking Expenses Associated With a Service Order

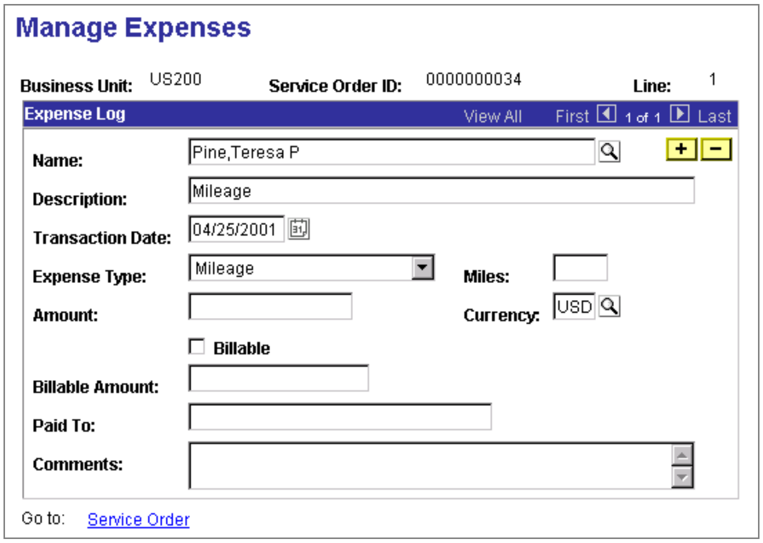
In PeopleSoft CRM, you can log expenses associated with performing the work for each service order line using the Manage Expenses component.

Understanding Expense Logs

For each line on a service order, the system automatically creates a blank expense log that can be updated using the Manage Expenses page. Information entered on the Manage Expenses page is stored in the PeopleSoft database for informational purposes only. Although the system offers no expense reporting, costing, or billing capabilities as delivered, you can design your own reports and processes to leverage the expense data captured for each service order.

Manage Expenses Page

Usage	Use the Manage Expenses page to track any expenses incurred while performing a service activity.
Object Name	RF_EXPENSE
Navigation	• **Manage FieldService, Maintain Service Orders, Use, Manage Expenses** • Click the Manage Expense link on the Service Order page. • Click the Expenses link on the My Service Order page.
Prerequisites	A service order line must be created using the Service Order page or the My Service Order page before you can record expenses. The system automatically creates an expense record for the line of the service order. **Note.** The fields on the Manage Expenses page will be unavailable for entry if the associated service order line requires approval and has not been approved. **For more information** about the Service Order page, see the Creating and Managing Service Orders chapter. **For more information** about the My Service Order page, see the Working With My Service Orders chapter.
Access Requirements	When accessing the page from the Use menu, enter a business unit, service order ID, and service order line number. You cannot add new expense records manually. You can only update the blank records created by the system for each line added to a service order.



Manage Expenses page

The system displays the **Business Unit, Service Order ID,** and service order **Line** number.

Expense Log

The **Expense Log** scroll area lists the expense records associated with the service order line. You can add entries to record multiple expenses for a service order line.

Name — The name of the worker who incurred the expense. The system automatically populates this field with the name of the lead technician defined for the service order line. You can modify this value as necessary.

Description — A description of the expense. For each expense record, you can enter a description using up to 30 alphanumeric characters.

Transaction Date — The date that the expense was incurred.

Expense Type — The category of expense. As delivered, the system offers the following options: ***Airfare, Entertainment, Food - Breakfast, Food - Dinner, Food - Lunch, Gas, Lodging, Mileage, Miscellaneous, Parking, Phone, Rental Car,*** and ***Tolls.***

Miles — The number of miles recorded if the **Expense Type** is ***Mileage.***

Amount — The amount incurred by the worker for the expense in the currency specified in the **Currency** field.

Currency — The currency of the expense **Amount**. For each set of entries that you add, the system automatically populates this field with the currency defined for the customer on the Maintain Customers - General Information page. You can modify this value as necessary.

For more information about the pages in the Maintain Customers component, see Managing Customer Information in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Billable	Indicates whether the expenses can be billed to the customer.
Billable Amount	The portion of the total expense amount that can be billed to the customer in the currency specified in the **Currency** field.
Paid To	The person or company that received payment for the expensed transaction.
Comments	Any notes recorded for the time log entry.

Click the **Service Order** link to return to the associated service order.

CHAPTER 8

Working With My Service Orders

The My Service Order component enables technicians to work with a streamlined version of the service orders that they have been assigned.

Using the My Service Order Component

The My Service Order component is designed for use by technicians who are performing the requested work on the service order. Typically, service orders are created and assigned by a call center agent or dispatcher using the Service Order page. Once a service order line has been assigned, the assigned technician can update the status of the service order line, record time and expenses for the requested work, and order materials to perform the work using the My Service Order component.

The My Service Order component and the Service Order component provide two views of a customer's service order. Updates and modifications can be made to the service order from either component and are subject to the same edits. For example, if a change is made to the actual start date on a service order using the My Service Order component, the date change is reflected when you access the service order using the regular Service Order component.

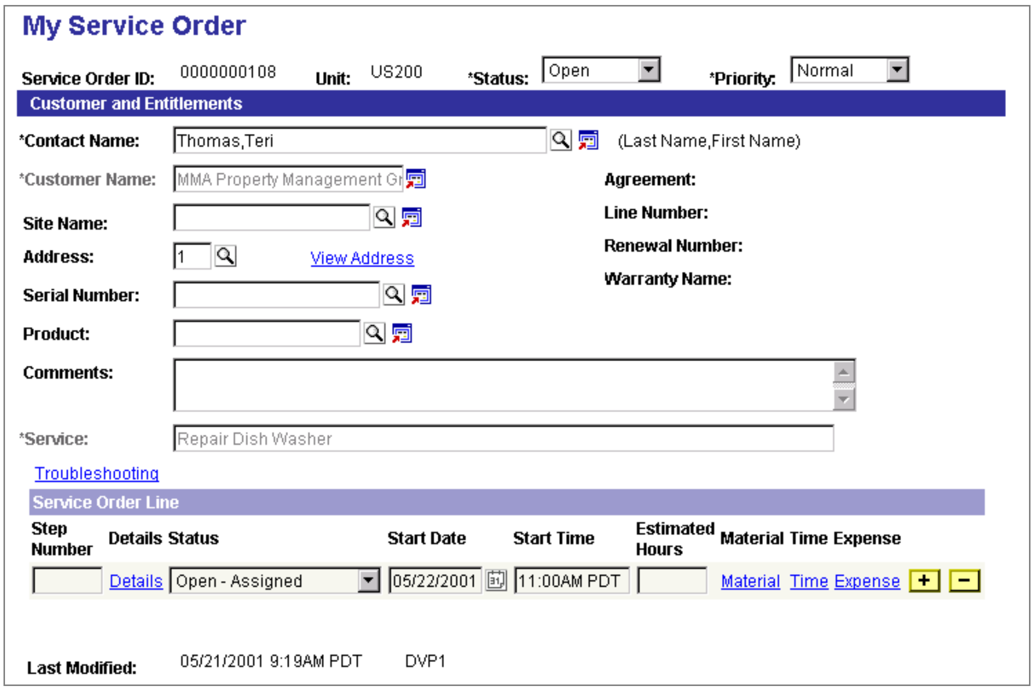
There are functional differences between the Service Order component and the My Service Order component. The My Service Order component:

- Displays all time values in the time zone of the technician only.
- Provides no search for or view of the customer's entitlements.
- Provides no approval processing.
- Provides no billing information.
- Displays the service order lines in summary form initially, but provides view access to the details if necessary.
- Provides no access to the task assignment engine.
- Provides access to the Solution Advisor page, where technicians can research solutions that have been recorded for a specific problem or condition.

For more information about the Service Order component, see the Creating and Managing Service Orders chapter.

My Service Order Page

Usage	Use the My Service Order page to view and update the service orders that have been assigned to you.
Object Name	RF_SO_TECH
Navigation	**Manage FieldService, Maintain Service Orders, Use, My Service Orders**
Prerequisites	If no service orders have been assigned to you, you cannot access this page.
Access Requirements	Enter a business unit to select from a list of all service orders that have been assigned to you. You can narrow your search by specifying the service order ID, customer ID, service order status, or service order priority.



My Service Order page

The system displays the **Service Order ID** and business **Unit** that you selected to access the page.

Status The current status of the service order at the header level.

For more information about service order header and line statuses, see the Creating and Managing Service Orders chapter.

Priority The current priority associated with the service order: ***Low, Normal, High,*** or ***Urgent.*** Service order lines with an ***Urgent*** priority are displayed on the Dispatch Board with a red stripe. You can also design notification processes based on these priorities using the workflow features available in PeopleTools.

For more information about the Dispatch Board, see the Working With the Dispatch Board chapter. **For more information** about designing workflow notifications, PeopleSoft Workflow in the *PeopleTools PeopleBook.*

Customer and Entitlements

The fields under **Customer and Entitlements** capture header-level information for the service order.

Contact Name The name of the person who placed the service request in last name, first name format. If you enter a contact name first, the system automatically populates the **Customer Name, Site Name,** and address information. Before you can specify a contact, the contact must first be established in your system. To define a new contact, click the transfer button to access the Maintain Contact component.

For more information about the Maintain Contact component, see Maintaining Contacts in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Customer Name The name of the customer requesting service. Before you can create a service order for a customer, the customer must first be established in your system. To define a new customer, click the transfer button to access the Maintain Customers component.

Site Name The site where the requested service will be performed. Multiple sites can be associated with each customer. To define a new site for a customer, click the transfer button to access the Sites page of the Maintain Customer component.

Note. You must enter the customer name first for the system to display the valid site names defined for the specified customer in the prompt list.

Address

A specific address associated with a customer site. The system automatically populates this address when you enter the customer and site. You can define multiple addresses for a customer on the Address page of the Maintain Customer component. If you specify an address, you can click the **View Address** link to view the corresponding address on the Address Information page, which is documented later in the chapter.

For more information about the Maintain Customer component, see Managing Customer Information in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

View Address

Click this link to access the Address Information page, where you can view the address where the requested service will be performed. The Address Information page is documented later in this chapter.

Serial Number

The serial number of the product that requires service. If you enter a serial number that is associated with an installed product record that does not have a status of *Uninstalled*, the system automatically populates the service order with the information available on the installed product record, including **Product, Customer Name, Contact Name,** and **Address.**

Product

The identification of the product that requires service. Before you can specify a product ID, the product must be established in your system. To define a new product, click the transfer button to access the Product Definition component.

If you enter a product ID that is associated with an installed product record that does not have a status of *Uninstalled*, the system automatically populates the service order with the information available on the installed product record, including **Serial Number, Customer Name, Contact Name,** and **Address.**

Note. If more than one installed product record for a serial number or product is found, the system displays the Installed Product List page, where you can select the applicable installed product record.

For more information about installed product records, see Tracking Installed Products in the *PeopleSoft CRM Application Fundamentals PeopleBook.* **For more information** about the product definition, see Setting Up Products in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Agreement The identification of the customer's service agreement, if applicable.

Line Number The agreement line number that defines the customer's entitlements, if applicable.

Renewal Number The renewal number associated with the agreement, if applicable.

Warranty Name The identification of the warranty that covers the specified installed product, if applicable.

Note. For agreement and warranty information to appear on the My Service Order page, it must first be specified on the Service Order page.

Comments Any comments entered about the service order.

Service The requested service. Services must first be established in your system using the Service component. The system automatically creates service order lines for activities defined for the service on the associated agreement line or when the service is manually selected in the Service Order component. You can modify the service order lines and add additional lines for other service activities if necessary.

For more information about the Service component, see the Setting Up Your Services chapter.

Troubleshooting Click this link to access the Solution Advisor page, where you can search for solutions that have been logged for a specific problem or condition. The Solution Advisor page is documented later in this chapter.

Service Order Line

The **Service Order Line** grid lists all service order lines that have been defined for the service order.

Step Number	The number used to sequence the service order lines. Service order lines are listed in order starting with the smallest step number value.
Details	Click this link to access the Service Order Details page, where you can view and update details of the service order line, such as required, estimated, and actual start and end dates, and comments related to the service order line. The Service Order Line Details page is documented later in this chapter.
Status	The current status of the service order line.

For more information about service order header and line statuses, see the Creating and Managing Service Orders chapter.

Start Date	The date that work on the service order line is required to begin. This field corresponds to the Required Start Date field on the Service Order page.
Start Time	The time that work on the service order line is required to begin on the required start date. This field corresponds to the Required Start Time field on the Service Order page.
Estimated Hours	The estimated number of hours required to perform the work on the service order line. The system populates this field with the estimated duration of the activity defined either on the Service Activities page, if the activity was defined as part of the service, or the Service Activity Code page, if the activity is specified an a manually added service order line. You can override this value as necessary.

For more information about the Service Activities page and the Service Activity Code page, see the Setting Up Your Services chapter.

Material	Click this link to access the Manage Material page, where you can view the material required to perform the work, order additional material if necessary, and record material receipt and usage for the service order line.

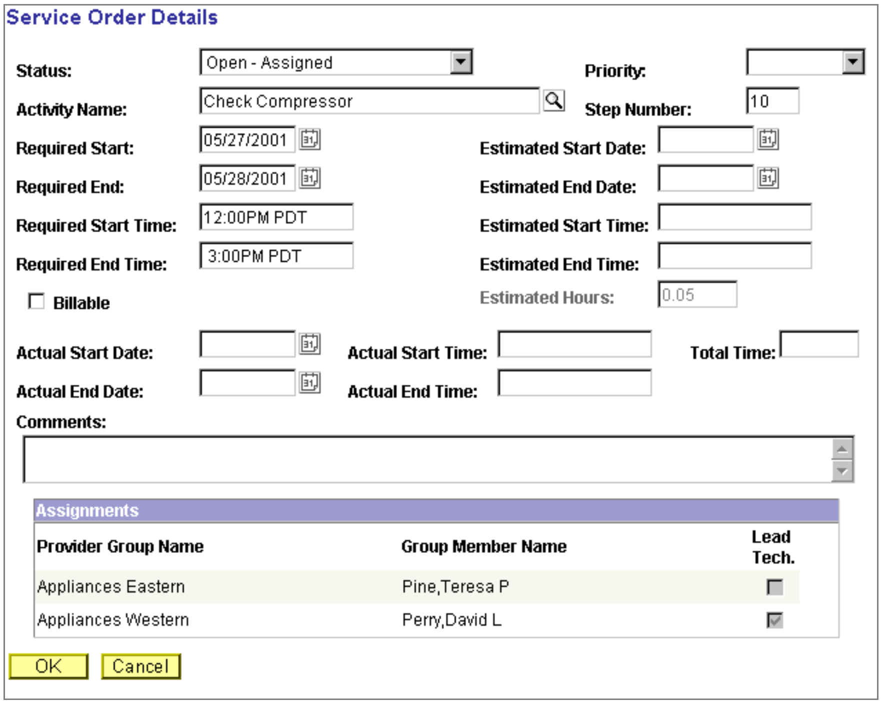
For more information about the processes initiated from the Manage Material page, see the Managing Service Order Material Requirements chapter.

Time	Click this link to access the Manage Time page, where you can record the time spent performing the work on the service order line.
	For more information about recording labor time, see Tracking Time Spent on Service Orders and Cases in the *PeopleSoft CRM Application Fundamentals PeopleBook.*
Expense	Click this link to access the Manage Expenses page, where you can record expenses associated with performing the work for the service order line.
	For more information about recording expenses, see the Tracking Expenses Associated With a Service Order chapter.

The **Last Modified** field displays a time stamp showing when the sales order was updated and the name of the person who made the change.

Service Order Details Page

Usage	Use the Service Order Details page view and update details of the service order line, such as required, estimated, and actual start and end dates, and comments related to the service order line.
Object Name	RF_SO_DETAILS_SEC
Navigation	Click the Details button on the My Service Order page.



Service Order Details page

This page lists the fields associated with the service order line that you selected in the Service Order Line summary grid of the My Service Order page.

Status

The current status of the service order line.

For more information about service order header and line statuses, see the Creating and Managing Service Orders chapter.

Priority

The current priority associated with the service order line: ***Low, Normal, High,*** or ***Urgent.*** Service order lines with an ***Urgent*** priority are displayed the Dispatch Board with a red stripe. You can also design notification processes based on these priorities using the workflow features available in PeopleTools.

For more information about the Dispatch Board, see the Working With the Dispatch Board chapter. **For more information** about designing workflow notifications, PeopleSoft Workflow in the *PeopleTools PeopleBook.*

Activity Name

The activity that needs to be performed for the service order line. Service activities must first be established in your system using the Service Activity Code page.

Multiple service activities can be associated with each service defined in your system using the Service Activity page of the Service component. The system automatically creates service order lines for any service activities defined for the service when you select the service. You can modify the service order lines and add additional lines for other service activities if necessary.

For more information about defining service activities, see the Setting Up Your Services chapter.

Step Number

The number used to sequence the service order lines. Service order lines are listed in order starting with the smallest step number value.

Required Start Date

The date that work on the service order line is required to begin. You must manually select an appropriate date based on the customer's entitlements or the customer's request. For new service order lines, enter an appropriate start date or change an existing value as needed.

The system uses this date and the corresponding required start time to trigger workflow processes that enable you to monitor and escalate service orders for which work has not begun on time and manage service orders for which the customer's guaranteed response time has been exceeded.

For more information about the service order workflow delivered with PeopleSoft CRM FieldService, see the Creating and Managing Service Orders chapter.

Required Start Time

The time that work on the service order line is required to begin on the required start date. You must manually enter an appropriate start time based on the customer's entitlements or the customer's request. For new service order lines, enter an appropriate start time or change the existing values as needed.

Required End Date

The date that work on the service order line is required to be completed. You must manually select an appropriated date based on the customer's entitlements, the customer's request, or the total duration of the service. For new service order lines, enter an appropriate end date or change the existing value as needed.

The system uses this date and the corresponding required end time to trigger workflow processes that enable you to monitor and escalate service orders for which work has not begun on time and to manage service orders for which the customer's guaranteed restore time has been exceeded.

For more information about the service order workflow delivered with PeopleSoft CRM FieldService, see the Creating and Managing Service Orders chapter.

Required End Time
The time that work on the service order line is required to be completed on the required start date. You must manually enter an appropriate time based on the customer's entitlements, the customer's request, or the total duration of the service. For new service order lines, enter an appropriate end time or change the existing value as needed.

Billable
Indicates that some portion of the time, materials, and expenses associated with the service order line can be billed to the customer. The default value for this option is set on the Service Activity page of the Service component.

Estimated Start Date
The date that work for the service order line is estimated to begin. This date is manually calculated based on technician and material availability. For new service order lines, enter an appropriate date.

Estimated End Date
The date that work for the service order line is estimated to end. This date is manually calculated based on the estimated start date and the estimated time to perform the work. For new service order lines, enter an appropriate date.

Estimated Start Time
The time that work for the service order line is estimated to begin on the estimated start date. This time is manually calculated based on technician and material availability. For new service order lines, enter an appropriate time.

Estimated End Time
The time that work for the service order line is estimated to complete on the estimated start date. This time is manually calculated based on the estimated start date, the estimated start time, and the estimated hours to perform the work. For new service order lines, enter an appropriate time.

Estimated Hours	The estimated number of hours required to perform the work on the service order line. The system populates this field with the estimated duration of the activity defined either on the Service Activities page, if the activity was defined as part of the service, or the Service Activity Code page, if the activity is specified an a manually added service order line. You can override this value as necessary.
Actual Start Date	The date that the work on the service order line actually began. If this field is blank when the service order line **Status** is set to ***Open - On Site,*** the system automatically sets the value to the current date.
Actual Start Time	The time that the work on the service order line actually began on the actual start date. If this field is blank when the service order line **Status** is set to ***Open - On Site,*** the system automatically sets the value to the current time.
Actual End Date	The date that the work on the service order line actually ended. If this field is blank when the service order line **Status** is set to ***Completed,*** the system automatically sets the value to the current date.
Actual End Time	The time that the work on the service order line actually ended. If this field is blank when the service order line **Status** is set to ***Completed,*** the system automatically sets the value to the current time.
Total Time	The total time required to perform the work on the service line in hours. Enter an appropriate value based on the actual start and end dates and times.
Comments	Notes pertaining to the service order line.

Assignments

The **Assignments** grid lists the technicians that have been assigned to perform the work on the service order line. Assignments can be modified only on the Service Order page.

Provider Group Name	The identification of the provider group that will perform the work on the service line.
Group Member Name	The name of the provider group member who will perform the work on the service line.
Lead Tech	Indicates whether the group member listed in the **Group Member Name** field of the row is the technician responsible for the service order line.

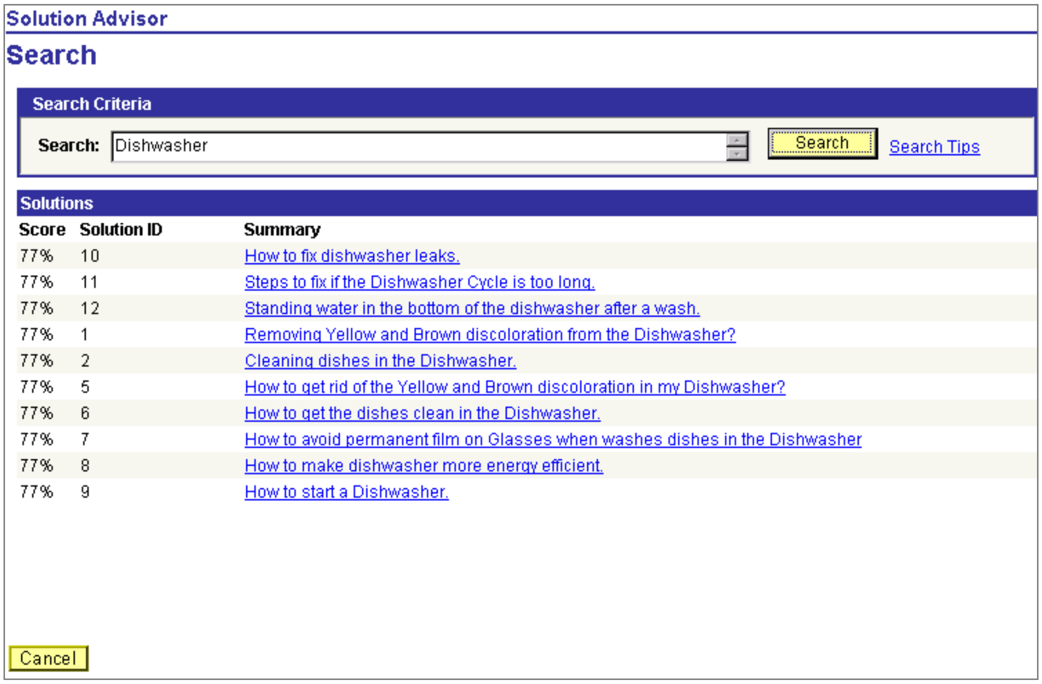
Note. Inventory transactions initiated from the Manage Material page for the service order line increase and decrease the quantity balance of storage locations in an inventory business unit that have been associated with the service order line's lead technician. Storage locations are associated with technicians on the Storage Locations page of the Worker component.

For more information about technicians associated with inventory storage locations, see the Defining Inventory Storage Locations for Technicians chapter. **For more information** about the processes initiated from the Manage Material page, see the Managing Service Order Material Requirements chapter.

Click **OK** to save any changes that you made and return to the My Service Order page. Click **Cancel** to return to the My Service Order page without saving your changes.

Solution Advisor - Search Page

Usage	Use the Solution Advisor - Search page to search for solutions that will help you perform a service. Solution Advisor searches for solutions that you create using the solution management features of PeopleSoft CRM. Solution Advisor is powered by Verity, a third-party search and retrieval tool. The PeopleSoft CRM search collection is the complete body of searchable data available to Solution Advisor. You must regularly rebuild the collection to ensure that Solution Advisor has access to current solution data. **For more information** about solution management, see Using Solution Advisor in the *PeopleSoft CRM Application Fundamentals PeopleBook.* **For more information** about administering your search collection, see Managing PeopleSoft CRM Search in the *PeopleSoft CRM Application Fundamentals PeopleBook.*
Object Name	RC_SA_SOLN_SEARCH
Navigation	• Click the Troubleshooting link on the My Service Orders page. • **Manage Call Center, Manage Solutions, Use, Field Service Solution Advisor**



Solution Advisor - Search page

Search Criteria

Search Enter your search text. Search text must conform to the syntax described in the search tips page. To view the search tips page, click the **Search Tips** link.

Click the **Search** button to search for solutions that match your search criteria. When the search is complete, the system displays the search results at the bottom of the page.

Search Tips Click this link to view tips for constructing your search text. The search tips provide information on the use of *and* and *or* in searches and on searching for entire phrases.

Solutions

Score A rating between 1 and 100 that represents how closely the solution matches your search criteria.

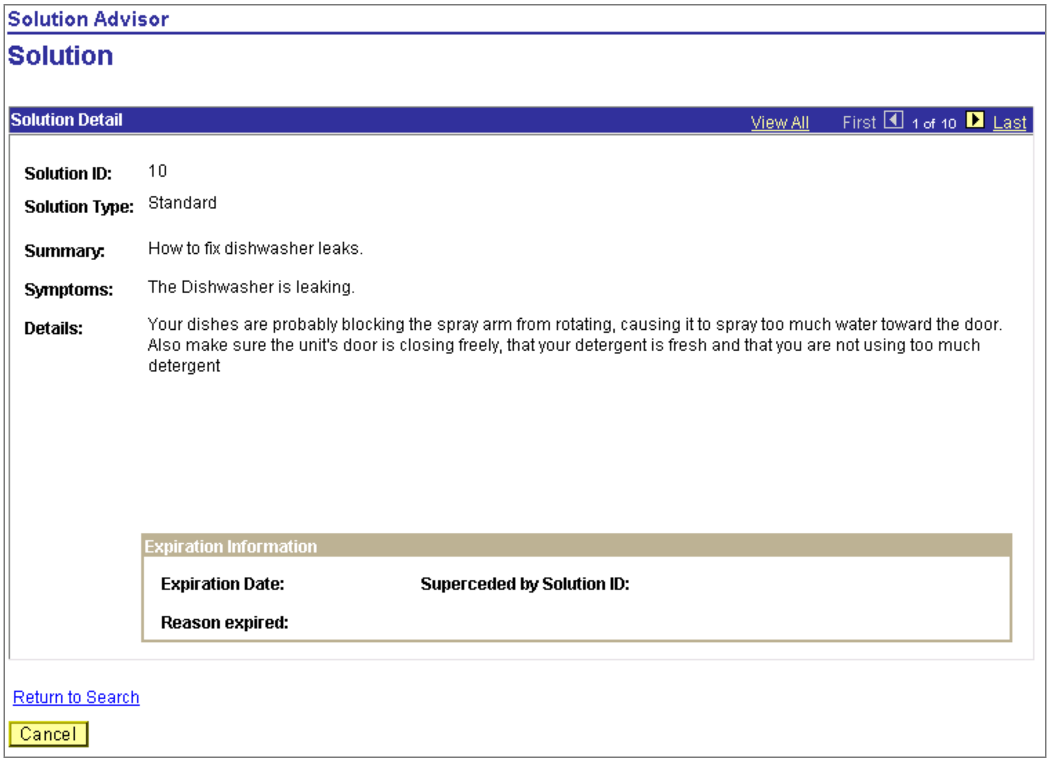
Solution ID The unique identifier for the solution.

Summary A short text summary of the solution. Click the summary text to display solution details on the Solution Advisor - Solution page.

Click **Cancel** to return to the My Service Order page.

Solution Advisor - Solution Page

Usage	Use the Solution Advisor - Solution page to view details about a solution found by Solution Advisor.
Object Name	RC_SA_SOLN_MN_DTL
Navigation	In the Solutions grid on the Solution Advisor page, click any solution summary.



Solution Advisor - Solution page

The **Solution ID, Solution Type, Summary, Symptoms,** and **Details** describe the solution. These values all come from the Solution Summary page.

Click **Return to Search** to return to the Solution Advisor - Search page. Click **Cancel** to return to the My Service Order page.

For more information about the fields on the Solution Summary page, see Solution Summary Page in the "Managing Solutions" chapter in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

CHAPTER 9

Working With the Dispatch Board

The dispatch board in PeopleSoft CRM FieldService offers a graphical representation of the task assignments for technicians over a given period of time together with a list of all the assigned and unassigned service orders in a business unit that have not been completed, closed, or canceled. With the Dispatch Board component, dispatchers can manage the daily service order workload for any of your FieldService business units, resolving scheduling conflicts, escalating high-priority work, and updating service order line status and start and end dates and times as necessary.

The following sections explain the functionality of the dispatch board and document the fields on the associated page.

Understanding the Dispatch Board

From the Dispatch Board page, you can view a bar graph representing work schedules and availability for a group of technicians over a specified 24-hour period. You can also view all service order lines for the business unit that have an open status. Links provide access to each technician's monthly and daily work schedule calendars, where you can view details of scheduled tasks and events that are unrelated to service order assignments. Similarly, links also provide access to the Service Order page, where you can change technician assignments, modify start and end times, and update the current status for each of the assigned and unassigned service orders lines in the business unit.

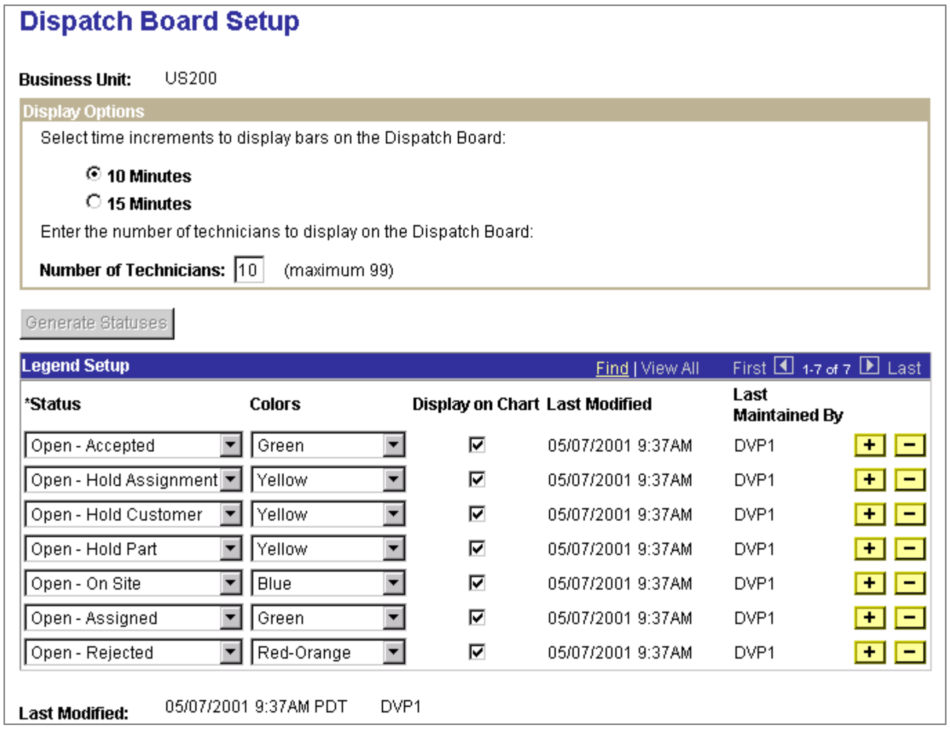
Before using the dispatch board, you must first define a dispatch board configuration for each of your PeopleSoft FieldService business units on the Dispatch Board Setup page. Dispatch board configuration settings control the color used to represent the service order line status, the number of technicians that are listed per dispatch board page, and the smallest increment of time that a task bar on the dispatch board can represent.

For more information about the Service Order page, see the Creating and Managing Service Orders chapter. The Dispatch Board Setup page and Dispatch Board page are documented in the next sections.

Dispatch Board Setup Page

Usage	Use the Dispatch Board Setup page to define configuration settings for the display attributes of each PeopleSoft FieldService business unit's dispatch board.

	For more information about dispatch board functionality, see Understanding the Dispatch Board in this chapter.
Object Name	RF_DISP_SETUP
Navigation	**Define Business Rules, Structure FieldService, Use, Dispatch Board Setup**
Access Requirements	Enter a business unit.



Dispatch Board Setup page

The system displays the **Business Unit** that you entered to access the page.

Display Options

The fields in the **Display Options** group box control how task bars are displayed on the dispatch board and the number of rows displayed on each page of the dispatch board.

10 minutes	Indicates that 10 minutes is the smallest interval of time that a task bar can represent on the dispatch board.
15 minutes	Indicates that 15 minutes is the smallest interval of time that a task bar can represent on the dispatch board.

Note. The 15-minute display option provides optimal performance for PeopleSoft FieldService business units with high service orders volumes or with large numbers of technicians within regions and provider groups. If both service order and non-service order tasks are expected to last at least 15 minutes in your enterprise, we recommend the 15-minute display option. Be aware however, that the Dispatch Board page will not display tasks defined as less than 15 minutes. Similarly, if you select the 10-minute options, the Dispatch Board page will not display task bars for tasks defined as less than 10 minutes.

Number of Technicians

The maximum number of technicians that the system displays per page of the dispatch board. Each row of the dispatch board represents the work schedule and availability for a technician. The number of rows returned equals the number of active group members associated with the specified region or provider group. Enter a value in this field to specify the maximum number of rows that can appear on each page of the dispatch board. You can use the Next and Previous navigation arrows to display any additional technician schedules returned by the system.

Note. For optimal performance, display more than 10 technicians per page of the dispatch board. Initial loading time increases with the number of rows displayed; however, displaying more rows per page reduces the requirement to navigate through multiple pages of the dispatch board.

Legend Setup

When you add a dispatch board setup record for a business unit, click the **Generate Statuses** button to populate the **Legend Setup** grid with the available service order line status values together with the default color associated with each status. You can modify the information in the **Legend Setup** grid as necessary.

Status

The service order line status value.

For more information about service order header and line status, see the Creating and Managing Service Orders chapter.

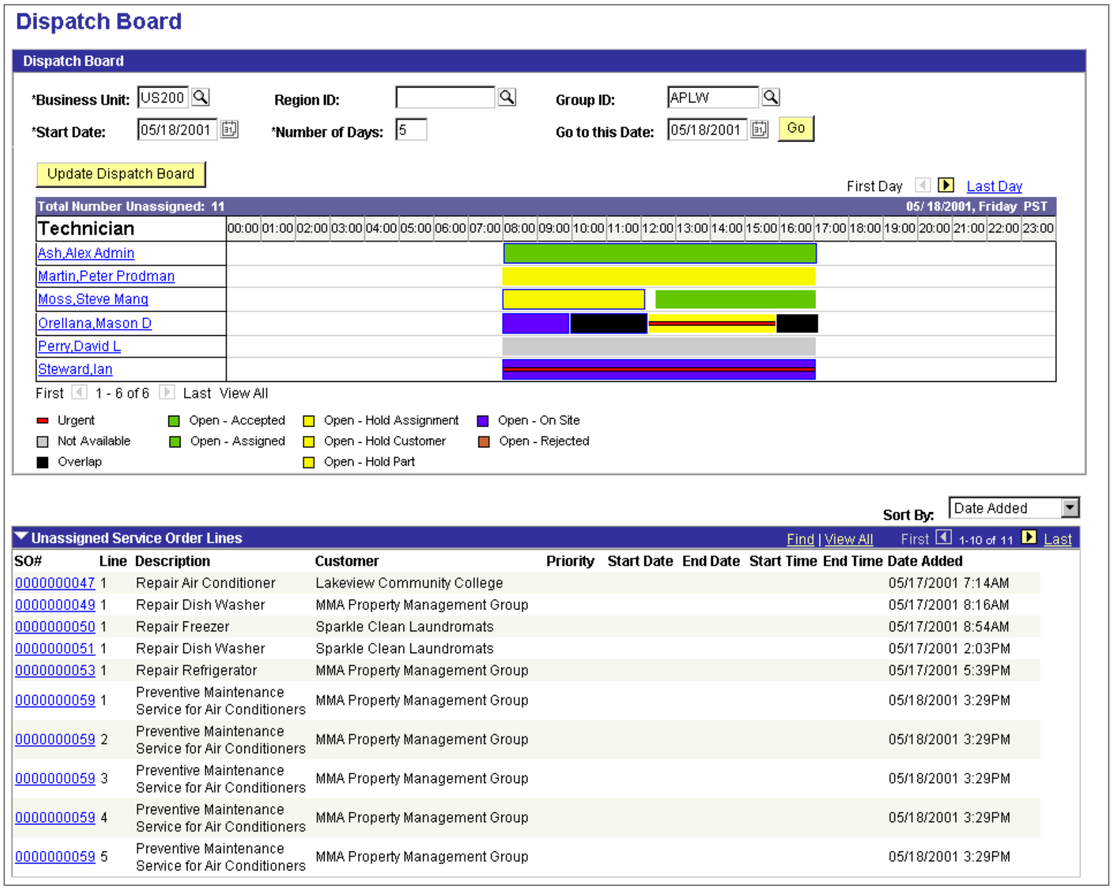
Note. If a service order line status is not defined in the **Legend Setup** grid, service order lines in that status will not appear on the dispatch board. The dispatch board does not display service order lines with a *Complete, Closed,* or *Canceled* status.

Colors	The color associated with the service order line status. You can associate a service order line status value with any of the following colors: ***Blue, Blue-Green, Green, Orange, Purple, Red-Orange, Yellow, Yellow-Green,*** or ***Yellow-Orange.***
Display on Chart	Indicates whether service orders lines with the associated status value appear on the dispatch board.
Last Modified	The date that the row was last updated.
Last Maintained By	The user ID of the person who made the last modifications to the row.

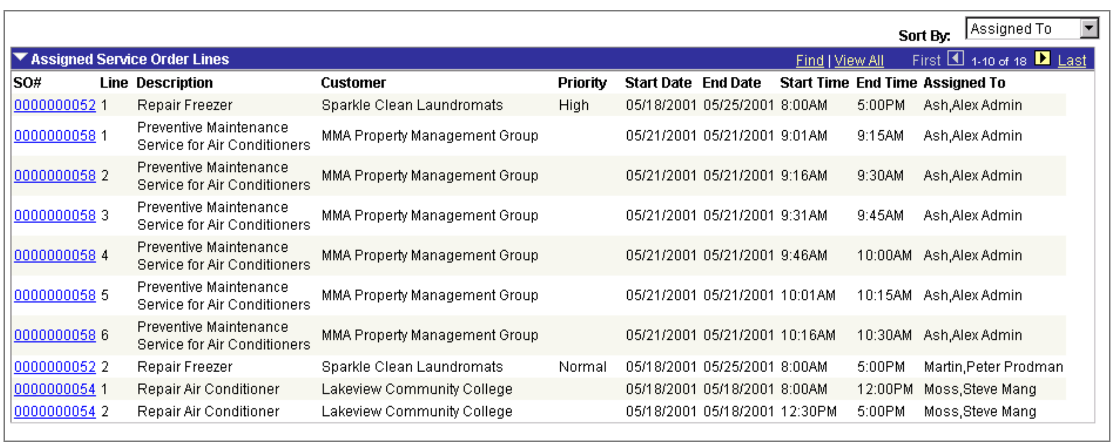
The **Last Modified** field displays the date that the dispatch board record was last updated and the user ID of the person who made the change.

Dispatch Board Page

Usage	Use the Dispatch Board page to view a graphical representation of technician availability for a given period of time, the status of assigned service orders, and a list of all unassigned and assigned services order lines that have not been completed, closed, or canceled. To resolve conflicts, change work schedules, or modify service order assignments, you can access the work schedule calendars of technicians and the assigned and unassigned service orders from links on the dispatch board. **For more information** about dispatch board functionality, see Understanding the Dispatch Board in this chapter.
Object Name	RF_DISPATCH_BRD
Navigation	**Manage FieldService, Maintain Service Orders, Use, Dispatch Board**
Prerequisites	Configuration settings for the dispatch board must first be defined for the business unit on the Dispatch Board Setup page, which is documented in the previous section.



Dispatch Board page (1 of 2)



Dispatch Board page (2 of 2)

Dispatch Board Search Criteria

To display service order line assignments for a specific provider group or group members associated with a specific region, enter criteria for the service orders that you want to work with using the fields at the top of the **Dispatch Board** group box and click the **Refresh Page** button. The system populates the grids on the page with the service order lines that match your criteria.

Business Unit

The identification of the business unit associated with the service orders that you want to work with. The system returns all service order lines for the business unit that do not have a status of *Completed, Closed,* or *Canceled.*

Region ID

The identification of the region ID associated with the provider groups that you want to work with. The system returns the work schedules of the active technicians in the provider groups associated with the region. You must enter a **Region ID** or provider **Group ID.**

For more information about provider groups, see Setting Up and Maintaining Provider Groups and Group Members in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Group ID

The identification of the provider group that you want to work with. The system returns the work schedules of all the active technicians in the specified provider group. You must enter a **Region ID** or provider **Group ID.**

Start Date

The first day of the period displayed on the dispatch board. The system returns the technician work schedules for the period defined by the **Start Date** plus the **Number of Days.**

Number of Days

The number of days to display on the dispatch board, beginning from the **Start Date.** The system returns the technician work schedules for the period defined by the **Start Date** plus the **Number of Days.**

Go to this Date

The date within the time period defined by the **Start Date** and the **Number of Days** that you want to display on the dispatch board. This field appears after your initial search. Enter a date and click the **Go** button to display the assignment schedule for the date that you enter. You can also use the First and Last navigation buttons and Next and Previous navigation arrows to navigate through the days of the time period.

Dispatch Board Assignment Grid

The assignment grid graphically displays the work schedules for each technician associated with the specified region or provider group. The top of the assignment grid displays the number of unassigned service order lines that meet your criteria in the **Total Number Unassigned** field and the date of the 24-hour period currently displayed. The system also displays the time zone of the database server. The name of each **Technician** associated with the specified region or provider group is listed in alphabetical order in the first column of the assignment grid. The maximum number of technicians listed on each page of the dispatch board's assignment grid is established on the Dispatch Board Setup page. Use the navigation controls below the assignment grid to navigate to other pages of the grid. You can click the technician's name to access his or her monthly work schedule on the Monthly Calendar page.

Bars displayed on each row of the assignment grid graphically represent service order line assignments and periods of unavailability recorded on the associated technician's work schedule calendar for the 24-hour period displayed. When you place your cursor on a bar, the system displays text that identifies what the bar represents. Gray bars on the grid represent tasks or events unrelated to service order lines, such as company meetings, training, and vacation periods. You can click a gray bar to access the associated technician's daily work schedule on the Daily Calendar page, where you can view details about the non-service order task or event for the technician.

For more information about viewing worker schedules on the Monthly Calendar page and the Daily Calendar page, see Using Resource Calendars in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Service order line assignments for each technician appear in a color indicating the status of the service order line. The legend below the assignment grid provides an explanation of each color. The color associated with each status value is established on the Display Board Setup page. Click the bars indicating assigned service order lines to access the Service Order page, where you can modify the status, priority, start and end dates and times, and technician assignment for the service order line.

For more information about the service order line status and the Service Order page, see the Creating and Managing Service Orders chapter.

Service order lines with a priority of *Urgent* are represented with a red stripe on the task bar. A task bar with an outline indicates a service order line that does not have a defined service activity. Conflicts in a technician's schedule appear as black bars. Click a black bar to access the Service Order page (if applicable) or the Daily Calendar page for the technician, where you can resolve the schedule conflict.

Unassigned and Assigned Service Order Lines

The **Unassigned Service Order Lines** and the **Assigned Service Order Lines** grids list the open service order lines that match the search criteria entered at the top of the page. To populate the **Unassigned Service Order Lines** grid, the system performs a search using only the specified business unit and region. To populate the **Assigned Service Order Lines** grid, the system performs a search using the business unit and provider group, if entered, or the business unit and region if the provider group is not specified. Service order lines with a *Completed, Closed,* or *Canceled* status do not appear. To change the sort order of the rows in these grids, enter a **Sort By** value for each grid. Rows in the **Unassigned Service Order Lines** grid can be sorted by ***Customer, Date Added, Priority,*** and ***Start Date.*** Rows in the **Assigned Service Order Lines** grid can be sorted by ***Assigned To, Customer, Priority, SO#*** (service order number), and ***Start Date.***

The **Unassigned Service Order Lines** and the **Assigned Service Order Lines** grids display many of the same columns of information for each service order line:

SO# (service order number)	The service order number. Click this link to access the Service Order page, where you can modify the status, priority, start and end dates and times, and technician assignment for the service order line.
Line	The line number of the service order line.
Description	The name of the service from the service order header.
Customer	The name of the customer who requested the work on the service order.
Priority	The current priority associated with the service order: ***Low, Normal, High,*** or ***Urgent.*** Service order lines with an ***Urgent*** priority are displayed on the dispatch board with a red stripe.
Start Date	The estimated start date on the service order line, if available, or the required start date if the estimated start date field is blank.
End Date	The estimated end date on the service order line, if available, or the required end date if the estimated end date field is blank.
Start Time	The estimated start time on the service order line, if available, or the required start time if the estimated start time field is blank.
End Time	The estimated end time on the service order line, if available, or the required end time if the estimated end time field is blank.
Date Added	The date that the service order was created. Only the **Unassigned Service Order Lines** grid displays this column.
Assigned To	The technician to whom the service order line was assigned. Only the **Assigned Service Order Lines** grid displays this column.

C H A P T E R 1 0

Integrating With PeopleSoft Applications

This chapter highlights requirements, provides recommendations, and describes points to consider when implementing Peoplesoft CRM FieldService with applications in the PeopleSoft Supply Chain Management and Peoplesoft HRMS product lines.

Integrating With PeopleSoft Supply Chain Management Applications

Material management functions and real-time item balance and availability checks in PeopleSoft CRM FieldService require integration with inventory and purchasing systems. If you are integrating with PeopleSoft Inventory and PeopleSoft Purchasing in the PeopleSoft Supply Chain Management product line, consider the following list of requirements and recommendations.

For more information about manage material transactions in PeopleSoft CRM FieldService, see the Managing Service Order Material Requirements chapter. **For more information** about the real-time item balance and availability checks, see Checking Item Balances and Availability in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Activating the Required Application Message EIPs

Manage material transactions require the following application message EIPs: the Business Unit EIP, Item Master EIP, Customer EIP, Product EIP, the Purchase Order Requisition EIP, the Inventory Adjustment EIP, the Interunit Receiving EIP, and the PO Receipt EIP. As delivered, PeopleSoft EIP application messages are inactive. In both your PeopleSoft CRM and PeopleSoft Supply Chain Management systems, you must activate the required application messages, set the associated message channel to run mode, define the publication or subscription routing rules, and configure an existing message node or define a new message node.

For more information about application messaging technology, see PeopleSoft Application Messaging in the *PeopleTools PeopleBook.* **For more information** about the application message EIPs that support material management transactions, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook.*

Setting Up Business Interlinks

The Item Balance EIP and the GET_PO_IUT EIP are business interlink EIPs. When you implement these EIPs, you must modify the business interlink definitions, RF_IN_ITEM_BALANCES and RF_GETPOIUT, to reference the correct merchant URL, user ID, and password for Peoplesoft Inventory and PeopleSoft Purchasing.

For more information about implementing business interlinks, see PeopleSoft Integration Tools and Utilities in the *PeopleTools PeopleBook.* **For more information** about setup requirements specific to the GET_PO_IUT EIP and the RF_IN_ITEM_BALANCES EIP, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook.*

Defining Inventory Business Units

We recommend that you define business units in PeopleSoft Inventory system that represent only storage locations in your field service trucks. These inventory business units for field service trucks should be separate from the inventory business units that represent your distribution warehouses. As the integration is designed, stock requested on orders that are initiated from a field service truck and fulfilled from inventory stores is transferred to the truck with an interunit transfer. This integration design assumes that the truck stock storage location is in a different business unit than the stock used to fulfill the material order.

If both the truck stock storage location and the fulfillment stock are in the same business unit, you would be forced to perform a bin-to-bin transfer within the inventory business unit to move the required material to the trucks. This material movement transaction within PeopleSoft Inventory would not provide warehouse staff with a pick list for the required move, nor would it support receiving transactions at the truck.

For the inventory business units that represent field service trucks, we also recommend that you turn off soft reservation processing and exclude the truck business units from distribution networks. Stock in truck storage locations should not be available to fulfill sales orders and material stock requests.

Because the order of positive and negative adjustment transactions to inventory storage locations cannot be predicted, we recommend that you setup your inventory business units to allow transactions to drive inventory quantity balances negative.

For more information about defining inventory business units, see the *PeopleSoft Inventory PeopleBook.* **For more information** about enabling negative quantity balances in PeopleSoft Inventory, see the PeopleSoft Inventory PeopleBook.

Defining Storage Locations for Field Service Truck Stock

After you define inventory business units representing field service trucks in PeopleSoft Inventory, you define storage locations within the inventory business units that represent good and defective storage locations on your field service trucks. In PeopleSoft CRM, you use the Storage Locations page of the Worker component to associate one good truck stock location and one defective truck stock location with each member of your provider groups.

When defining storage areas in PeopleSoft Inventory, we recommend that you represent each field service truck as a storage area, with the storage levels within the area representing the good and defective locations for the truck. This model facilitates searching and reporting on truck stock storage areas in PeopleSoft Inventory.

We also recommend that you define the good truck storage locations as nettable and the defective truck storage locations as non-nettable in PeopleSoft Inventory. For implementations that include

PeopleSoft Enterprise Planning or PeopleSoft Production Planning, defining defective truck storage locations as non-nettable prevents planning processes from counting the defective or returned stock in these locations as available.

On the Storage Location page of the Worker component in PeopleSoft CRM, business units defined in PeopleSoft Supply Chain Management are available for selection if the Business Unit EIP has been implemented. However, the business unit prompt includes all business unit; the system does not filter by inventory business units. Additionally, there are no prompts for the storage location definition fields. Your data entry staff must know the correct inventory business unit to select and the correct storage location information to enter. We recommend that you carefully check the storage locations entered in PeopleSoft CRM for accuracy. For material movement transactions initiated from the Manage Material page to be successfully recorded in PeopleSoft Inventory, the storage locations entered in Peoplesoft CRM must define a valid storage location for the inventory business unit referenced in the IN Unit field on the Storage Location page.

The good truck storage location is used on receipt and material usage transactions initiated from the Manage Material component. The defective truck storage location is used for material removal transactions initiated from the Manage Material component.

When you perform an Item Balance By Group Member inquiry in PeopleSoft CRM, only item balances from good truck storage locations are displayed.

For more information about defining truck stock storage locations in PeopleSoft CRM FieldService, see the Defining Inventory Storage Locations for Technicians chapter. **For more information** about defining storage locations in PeopleSoft Inventory, see the *PeopleSoft Inventory PeopleBook.*

Defining Items

Item information in PeopleSoft CRM must be synchronized with item information in PeopleSoft Supply Chain Management. Although PeopleSoft CRM pages enable you to manually enter item information in PeopleSoft CRM, we recommend that you use the Item Master - CRM EIP to populate item tables in PeopleSoft CRM with the master item data in PeopleSoft Supply Chain Management. Once the Item Master - CRM EIP has been activated, however, the pages of the Item Definition component in PeopleSoft CRM can only be used to view item information. You will be unable to add or update item definitions in PeopleSoft CRM.

As delivered, PeopleSoft EIP application messages are inactive. In both your PeopleSoft CRM and PeopleSoft Supply Chain Management systems, you must activate the required application messages of the Item Master - CRM EIP, set the associated message channel to run mode, define the publication or subscription routing rules, and configure an existing message node or define a new message node.

PeopleSoft CRM stores only a subset of the item attributes defined in PeopleSoft Supply Chain Management—only the item attributes that are used in PeopleSoft CRM are synchronized. To view the complete item definition, use the item definition components in PeopleSoft Supply Chain Management.

Item definitions in PeopleSoft CRM are stored only at the setID level. Therefore, it is possible that a particular item may have a status of Active at the setID level but a status of *Inactive* in any of the business units in which it is defined.

For more information about item definition in PeopleSoft Supply Chain Management, see the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Defining Interunit Transfers Defaults

When you define interunit transfer defaults for your inventory business units using the Interunit Transfer Setup component in PeopleSoft Supply Chain Management, disable the Flag Items for Auto-Putaway option for destination business units that represent field service trucks. You must turn off the Flag Items for Auto-Putaway option to require a receipt transaction to be performed against all interunit receipts. When the Flag Items for Auto-Putaway option is enabled, the PeopleSoft Inventory system automatically sets the status of the interunit transfer to *Received* without requiring a receipt transaction. If the status of the receipt is *Received*, the PeopleSoft CRM system cannot retrieve the "expected receipt" information for the order on Manage Material page. The Service Order component in PeopleSoft CRM FieldService validates that all material ordered for a service order line is received before allowing the service order line to be closed. If interunit receipt information cannot be entered, the status of the service order line cannot be set to *Closed.*

For more information about the auto-putaway processing, see the *PeopleSoft Inventory PeopleBook.* **For more information** about the Interunit Transfer Setup component, see the *PeopleSoft Cost Management PeopleBook.* **For more information** about service order status, see Creating and Managing Service Orders in the *PeopleSoft CRM FieldService PeopleBook*.

Setting the Automatic Receiving Option for Field Service Business Units

When defining a field service business unit on the FieldService Definition page, you can determine whether the material orders initiated from the Manage Material page can be automatically received. In environments without automatic receiving, technicians must enter receiving information for a material shipment before they can record usage of the material. With automatic receiving, technicians enter only usage information—the quantity used and the quantity not used—from which the system automatically derives and posts the appropriate receiving transactions. Select the automatic receiving option that best meets your business practices. Neither option offers significant data entry advantages and the material management transactions produced in both automatic and manual receiving environments are identical.

Defining Defaults and Procurement Options for Requisition Processing

Field service business units in PeopleSoft CRM must be defined as a valid source of requisitions in PeopleSoft Supply Chain Management. Using the Requisition Loader Defaults component in PeopleSoft Supply Chain Management, you define each field service business unit as a Loader BU and establish processing defaults for requisitions staged by the field service business unit, including the purchasing business unit in PeopleSoft Purchasing that will process the requisitions.

When defining procurement options in PeopleSoft Supply Chain Management, you can associated the field service business unit with an appropriate distribution network on the Ship To Locations page. Sourcing processes in PeopleSoft Purchasing can be configured to check available quantity first in the distribution network before creating a purchase order with an external vendor. If quantity exists in one of the inventory business units in the defined distribution network, an interunit transfer is created to fulfill the requisition. Inventory business units representing field service trucks should not be included in distribution networks.

Note that business units defined in PeopleSoft CRM FieldService are available for selection on pages in PeopleSoft Supply Chain Management only if the Business Unit EIP has been implemented.

For more information about requisitions, sourcing processes, distribution networks, and purchase orders in PeopleSoft Purchasing, see the *PeopleSoft Purchasing PeopleBook* and the *PeopleSoft Applications Fundamentals for FSCM PeopleBook*. **For more information** about interunit transfers in PeopleSoft Inventory, see the *PeopleSoft Inventory PeopleBook.*

Understanding Requisition IDs

For requisitions initiated from the Manage Material component in PeopleSoft CRM, the system builds a 10-digit requisition ID by combining the material header ID and the material line number. Material Header IDs are created through automatic numbering and are 8 digits long. The material line number is 2 digits long.

For more information about automatic numbering, see Setting General Options in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Defining Valid Requisition Requester IDs

Every requisition generated in PeopleSoft CRM includes a requester ID, representing the person or entity that initiates a requisition request. For requisitions initiated from the Manage Material page, the system populates the Requester field with the default requester ID defined on the User Preferences - Overall Preferences page. You can select an alternate requester ID as necessary; however, the requester ID on requisitions staged in PeopleSoft Purchasing must be defined as a valid requester ID in PeopleSoft Supply Chain Management. Requesters are established on the Requester Setup page in PeopleSoft Supply Chain Management under the Structure Procurement Options menu.

You can setup requester IDs that are associated with multiple user IDs. In this case, a requester ID represents a specific group or region. Setting up requester IDs in this manner enables you to monitor requisitions staged by the associated group or region rather than by a specific person in the Requisition Workbench in PeopleSoft Purchasing.

For more information about establishing valid requisition requesters in PeopleSoft Supply Chain Management, see the *PeopleSoft Applications Fundamentals for FSCM PeopleBook.* **For more information** about the Requisition Workbench, see the *PeopleSoft Purchasing PeopleBook*.

Correcting Transaction Errors

Errors in transactions staged to PeopleSoft Supply Chain Management must be corrected using the error correction pages in PeopleSoft Supply Chain Management. For example, if a material management transaction is sent to PeopleSoft Supply Chain Management using an invalid storage location, the transaction remains staged until the error is corrected in PeopleSoft Supply Chain Management. After correction, the transaction can be reprocessed.

Setting Up Links to PeopleSoft Purchasing and PeopleSoft Inventory

When using the Manage Material component within the portal, users can link to the Requisition Workbench component in PeopleSoft Purchasing and the Item/Product Availability inquiry component in PeopleSoft Inventory. Implementation of these links depends on where the portal is installed in your system. If the portal is installed on the CRM database, no further setup is required. However, if the portal is not installed on the CRM database, you must change the URL for the RF_FDM_LINKS entry in the URL Catalog to point to the database on the portal for PeopleSoft Supply Chain Management. Change the URL for the RF_FDM_LINKS entry on the URL Maintenance page under the Utilities menu in PeopleTools.

For more information about implementing portal functionality, see Portal Technology in the *PeopleTools PeopleBook.* **For more information** about the URL Maintenance page, see PeopleTools Utilities in the *PeopleTools PeopleBook.*

Integrating with PeopleSoft HRMS

You can integrate with PeopleSoft HRMS to populate PeopleSoft CRM tables with competency information associated with your workers.

For more information about how worker competency information can be used in PeopleSoft CRM, see Managing Workforce Competencies in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

Activating the Required Application Message EIPs

In PeopleSoft CRM, you can enter competencies, competency proficiency ratings and competency assignments online using components within your PeopleSoft CRM system. However, if you are integrating with PeopleSoft HRMS, we recommend that you synchronize your system tables with the competency information defined in PeopleSoft Competency Management using the Person Competency EIP.

As delivered, PeopleSoft EIP application messages are inactive. In both your PeopleSoft CRM and PeopleSoft Supply Chain Management systems, you must activate the required application messages of the Person Competency EIP, set the associated message channel to run mode, define the publication or subscription routing rules, and configure an existing message node or define a new message node.

Note that the CRM system is a subscriber to Person Competency EIP messages, not a publisher. Any changes made to competency definitions or ratings in PeopleSoft CRM are not published or synchronized with PeopleSoft HRMS. All updates to competency records should be made in PeopleSoft HRMS and published to PeopleSoft CRM.

For more information about application messaging technology, see PeopleSoft Application Messaging in the *PeopleTools PeopleBook.* **For more information** about the Person Competency EIP, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook.*

Setting the Use Only Evaluation Type in PeopleSoft CRM

Before assigning competencies on the Competency Assignment page in PeopleSoft CRM, you must set the Use Only Evaluation Type field on the General Options page of the Installation component. The Person Competency EIP loads competency data with all evaluation types in PeopleSoft CRM. Specifying an evaluation type at installation enables the system to limit the competency records that can be selected on CRM pages. Although evaluation type is not displayed in PeopleSoft CRM, the pages in PeopleSoft CRM only display the competency records that match the specified evaluation type.

For more information about the Installation component, see the Setting General Options chapter.

CHAPTER 11

Running PeopleSoft CRM FieldService Reports

PeopleSoft CRM Field Service provides you with multiple predefined reports that you can use to monitor your Field Service activities.

The following PeopleSoft CRM Field Service reports are delivered predefined with your system:

Report Name	***Report ID***	***Location***
Dispatch Performance	RFC5000	Manage FieldService, Maintain Service Orders, Reports, Dispatch Performance
Expense	RFC5001	Manage FieldService, Maintain Service Orders, Reports, Expense Report
Expense by Customer	RFC5001A	Manage FieldService, Maintain Service Orders, Reports, Expense Report By Customer
Mean Time to Repair	RFC5002	Manage FieldService, Maintain Service Orders, Reports, Mean Time To Repair

Dispatch Performance Report

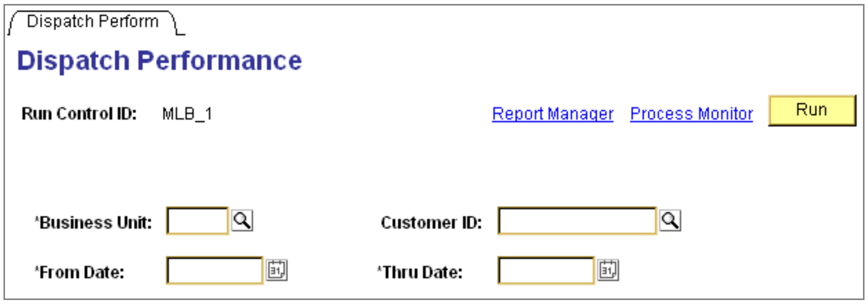
Use the Dispatch Performance report to display the number of service orders that you complete each month, by customer.

Report ID	RFC5000
Type of Report	Crystal
Source	Dispatch Performance Report run control page

Dispatch Performance Report Run Control Page

Usage	Use the Dispatch Performance Report run control page to run Dispatch Performance reports.
Object Name	RUN_RFC5000

Navigation	**Manage FieldService, Maintain Service Orders, Reports, Dispatch Performance**
Access Requirements	Enter a run control ID.



Dispatch Performance report run control page

Run Control ID
The code that uniquely identifies the specific instance of running the report.

Business Unit
Select the business unit within which the activities to be described in the report took place.

Customer ID
Select the customer whose dispatches will be described in the report.

From Date
Select the first date of the time period to be described in the report.

Thru Date
Select the last date of the time period to be described in the report.

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

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

Run
Click the **Run** button to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics in the *PeopleTools PeopleBook.*

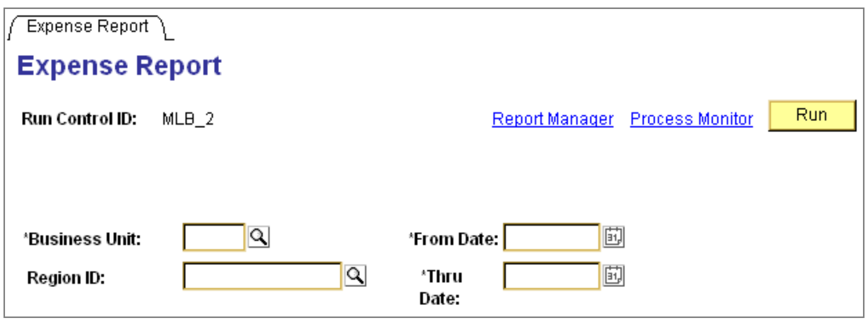
Expense Report

Use the Expense report to display your monthly expenses, by region and customer.

Report ID	RFC5001
Type of Report	Crystal
Source	Expense Report run control page

Expense Report Run Control Page

Usage	Use the Expense Report run control page to generate Expense reports.
Object Name	RUN_RFC5001
Navigation	**Manage FieldService, Maintain Service Orders, Reports, Expense Report**
Access Requirements	Enter a run control ID.



Expense Report run control page

Run Control ID The code that uniquely identifies the specific instance of running the report.

Business Unit Select the business unit within which the activities to be described in the report took place.

Region ID Select the region associated with the expenses to be described in the report.

From Date Select the first date of the time period to be described in the report.

Thru Date Select the last date of the time period to be described in the report.

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

Process Monitor

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

Run

Click the **Run** button to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics in the *PeopleTools PeopleBook.*

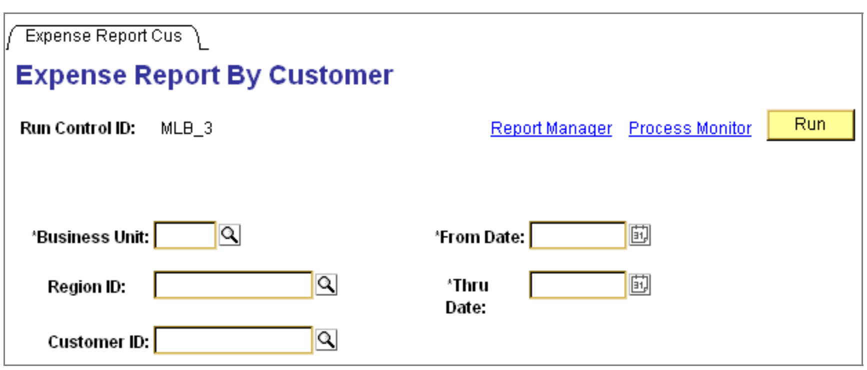
Expense by Customer Report

Use the Expense by Customer report to display your monthly expenses, by region and customer.

Report ID	RFC5001a
Type of Report	Crystal
Source	Expense by Customer report run control page

Expense by Customer Report Run Control Page

Usage	Use the Expense by Customer report run control page to generate Expense by Customer reports.
Object Name	RUN_RFC5001a
Navigation	**Manage FieldService, Maintain Service Orders, Reports, Expense Report By Customer**
Access Requirements	Enter a run control ID.



Expense by Customer report run control page

Run Control ID

The code that uniquely identifies the specific instance of running the report.

Business Unit	Select the business unit within which the activities to be described in the report took place.
Region ID	Select the region associated with the expenses to be described in the report.
From Date	Select the first date of the time period to be described in the report.
Thru Date (through date)	Select the last date of the time period to be described in the report.
Report Manager	Click **Report Manager** to access the Report List page, where you can view report content, check the status of the report, and see content detail messages (which include a description of the report and the distribution list).
Process Monitor	Click **Process Monitor** to access the Process List page, where you can view the status of submitted process requests.
Run	Click the **Run** button to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics in the *PeopleTools PeopleBook.*

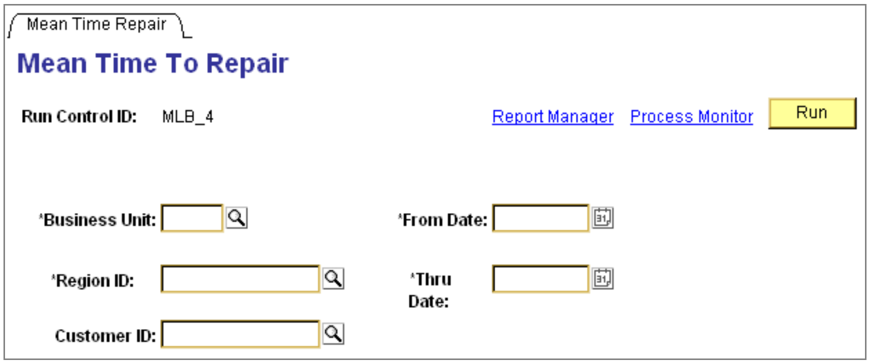
Mean Time To Repair Report

Use the Mean Time Expense Report report to display the average time that you spend on cases each month, by region and customer.

Report ID	RFC5002
Type of Report	Crystal
Parameters	Start Date, End Date, Region ID, Customer ID.
Source	Mean Time To Repair Report run control page

Mean Time To Repair Report Run Control Page

Usage	Use the Mean Time To Repair Report run control page to generate the Mean Time Expense Report report.
Object Name	RUN_RFC5002
Navigation	**Manage FieldService, Maintain Service Orders, Reports, Mean Time To Repair**
Access Requirements	Enter a run control ID.



Mean Time to Repair report run control page

Run Control ID The code that uniquely identifies the specific instance of running the report.

Business Unit Select the business unit within which the activities to be described in the report took place.

Region ID Select the region associated with the expenses to be described in the report.

From Date Select the first date of the time period to be described in the report.

Thru Date Select the last date of the time period to be described in the report.

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

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

Run Click the **Run** button to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics in the *PeopleTools PeopleBook.*

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