PeopleSoft 8 CRM Interaction Management PeopleBook

PeopleSoft CRM Interaction Management PeopleBook

SKU CRMr8CCIC-B 0601

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Contents

About This PeopleBook

The book provides you with the information that you need to implement and use PeopleSoft *CRM Interaction Management PeopleBook*. You can order the online version by requesting SKU *CRMB8R0* or the print version by requesting SKU *CRMr8CCIP-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 *PeopleSoft 8 Customer Relationship Management PeopleBooks* ,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 Interaction Management PeopleBook Contents

PeopleSoft CRM Interaction Management enables you to access all interactions between your organization and your employees and customers from a single page.

This book contains the following chapters:

Understanding PeopleSoft CRM Interaction Management	Introduces the reader to the fundamentals of PeopleSoft CRM Interaction Management.
Setting Up PeopleSoft CRM Interaction Management	Explains how to set up PeopleSoft CRM Interaction Management.
Using PeopleSoft CRM Interaction Management	Explains how to use PeopleSoft CRM Interaction Management.

CHAPTER 2

Understanding PeopleSoft CRM Interaction Management

Using PeopleSoft CRM Interaction Management, a customer service representative (CSR) can access pages in multiple applications from a single page – the 360-Degree View page.

When a CSR helps a customer, that CSR generally accesses various PeopleSoft applications on behalf of the customer. For example, the CSR might create a new lead from PeopleSoft CRM Sales, look up a service order in PeopleSoft CRM Field Service, and update a case in PeopleSoft Support, all during the same service call.

Note. PeopleSoft CRM Interaction Management gives you access to data stored in the CRM database. To access data stored in the FDM database, use PeopleSoft CSR Desktop.

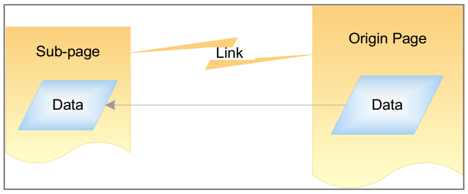
Understanding Interactions and Sub-Interactions

An interaction is the sum of the events that take place when a customer contacts your organization. Interactions are comprised of sub-interactions, which are the events themselves.

For example, suppose that a representative of hypothetical customer Allied Computing calls your technical support center and asks your company to repair a product that you sold. That phone call corresponds to an interaction. During the call, your customer service representative (CSR) logs a support case and dispatches a field service representative to the customer's site; those two acts correspond to sub-interactions of the main interaction.

Understanding 360-Degree Views

The 360-Degree View page consists of multiple sub-pages. Each sub-page corresponds to an origin page in a PeopleSoft application. The system draws data from origin pages to populate sub-pages. Only summary information appears on sub-pages; to see additional information, you click the link on a sub-page record to go directly to the corresponding origin page.



Sub-pages correspond to origin pages

For example, the sub-page Recent Support Cases corresponds to the PeopleSoft CRM Support page Support Cases. When you open the 360-Degree View page, the system populates the Recent Support Cases sub-page with summary data from the Support Cases page for a specific customer. You click a case code, and the system takes you directly to a Support Cases page displaying the case.

Adding Persons in PeopleSoft CRM Interaction Management

You can create new persons on the 360-Degree View page. The system treats such persons the same as persons created on the Worker component.

Adding Contacts in PeopleSoft CRM Interaction Management

You can create new customer contacts on the 360-Degree View page. The system treats such contacts the same as contacts created on the Contact User Profile page.

You cannot define an individual as a contact until you have defined a person to represent the individual. The CSR can define the individual a new person on the 360-Degree View page, then define the person as a contact on the same page.

For example, suppose an individual named Lynn Johnston calls a CSR and asks for a refund on behalf of customer Allied Computing. Johnston is not defined as a person in PeopleSoft CRM. "But I work for Allied Computing. I'm their new buyer," Johnston says. However, the CSR cannot define Johnston as a contact of Allied Computing until the CSR has defined Johnston as a person. The CSR can define Johnston as a person on the 360-Degree View page, then define the person Lynn Johnston as a contact of customer Allied Computing, all on the same page.

Important! You cannot define an individual as a contact until you have defined a person to represent the individual.

Understanding CTI

Computer Telephony Integration (CTI) automates the process of receiving customer phone calls. When a customer phones, the system opens a new browser to the object specified by the dialer with that customer's information displayed, and notifies a CSR that the customer is waiting.

For more information about Computer Telephony Integration (CTI), see the Configuring CTI Application Pages chapter in the *PeopleSoft CRM Application Fundamentals PeopleBook*.

CHAPTER 3

Setting Up PeopleSoft CRM Interaction Management

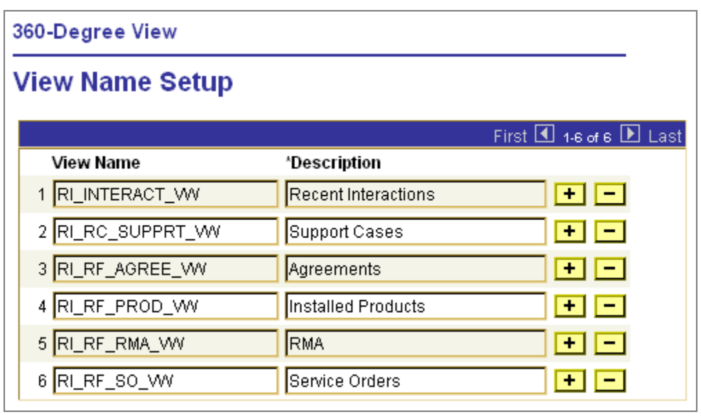
You set up Employee Portal home page pagelets at the same time that you set up PeopleSoft CRM Interaction Management subpages. The setup is identical, and is effected on the same fields on the same pages.

Setting Up PeopleSoft CRM Interaction Management Subpages

Before you use PeopleSoft CRM Interaction Management, you must determine which interaction pagelets and subpages the system populates with data. You also need to set the number of data rows that the system loads for subpages and pagelets each time you open the Employee Portal home page or 360-Degree View page.

View Name Setup Page

Usage	Use the View Name Setup page to determine which interaction pagelets and subpages the system populates with data.
Object Name	RI_SETUP_CODE
Navigation	**Manage Interactions, Customer Interaction Setup, Setup, Subpage Setup**

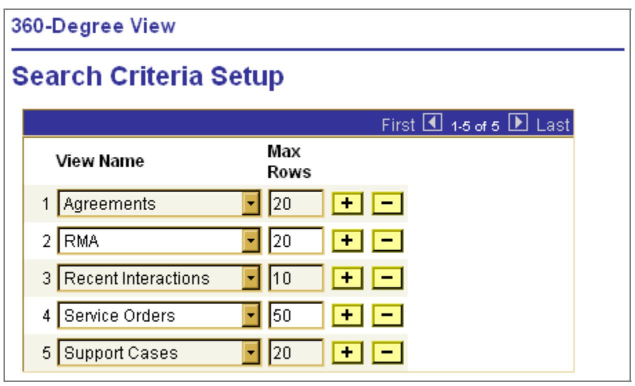


Interaction Pagelets/Subpages Setup page

View Name	Select the views that correspond to the pagelets and subpages to be populated with data.
	Important! The system always displays all pagelets and subpages on the Employee Portal home page and 360-Degree View page, respectively. However, the system only enters interaction data in those pagelets and subpages that correspond to views that you select here.
Description	Enter a brief description of the view.

Search Criteria Setup Page

Usage	Use the Search Criteria Setup page to set the number of data rows that the system loads for subpages and pagelets each time you open the Employee Portal home page or 360-Degree View page.
Object Name	RI_SETUP_CRITERIA
Navigation	**Manage Interactions, Customer Interaction Setup, Setup, Subpage Search Criteria**



Search Criteria Setup page

View Name	Select the views that correspond to the pagelets and subpages for which the system will load a limited number of records.
	For all views that you do not select here, the system loads all records for corresponding pagelets and subpages every time you open the Employee Portal home page or 360-Degree View page.

Note. Loading large numbers of interactions may slow your system. Therefore, it is generally advisable to select most view names here, and limit the number of data rows that the system loads.

Rows Max (rows maximum)	Enter the maximum number of data rows to be loaded each time you open the Employee Portal home page or 360-Degree View page.

For more information about using pagelets, see the PeopleSoft CRM Portal Pack PeopleBook.

CHAPTER 4

Using PeopleSoft CRM Interaction Management

Using PeopleSoft CRM Interaction Management, you can view information about your customers' interactions, and you can log new interactions. Those interactions can take place in multiple PeopleSoft applications.

You can use PeopleSoft CRM Interaction Management in two ways:

- Access PeopleSoft CRM Interaction Management pagelets on the PeopleSoft Employee Portal home page.
- Access PeopleSoft CRM Interaction Management subpages on the 360-Degree View page.

Note. Power users—people who access PeopleSoft CRM Interaction Management frequently—typically use the 360-Degree View page, for performance reasons.

Using PeopleSoft CRM Interaction Management Interaction Subpages

You can use the PeopleSoft CRM Interaction Management interaction subpages on the 360-Degree View page to manage customer interactions.

Accessing the 360-Degree View Page

You can access the 360-Degree View page in two ways:

- Click the 360-Degree View Page link on the PeopleSoft Employee Portal home page.
- Accept a telephone call from a customer by means of Computer Telephony Interface (CTI).

Managing Interactions Using the 360-Degree View Page

When you access the 360-Degree View page, the system automatically populates the PeopleSoft CRM Interaction Management interaction subpages with information about the selected customer.

Multiple interaction subpages appear on the 360-Degree View page. The system populates subpages with information about the most recent customer interactions. For example, the Recent Support Cases subpage contains information about the most recent support cases created for the selected customer.

On the *Interaction* subpage, you can define new customer interactions. For example, if a customer calls your customer service center, a customer service representative can document that phone call by defining an interaction using the Interaction subpage.

Using PeopleSoft CRM Interaction Management Interaction Pagelets

You can use the PeopleSoft CRM Interaction Management interaction pagelets on the PeopleSoft Employee Portal home page to access customer interactions.

For more information about accessing customer interactions using the Employee Portal home page, see the PeopleSoft CRM Interaction Management Pagelets chapter in the *PeopleSoft CRM Portal Pack PeopleBook.*

Using Computer Telephony Interface

Your customers can trigger the system to open PeopleSoft CRM Interaction Management pages by phoning your customer service center or contacting your customer service center through your company website. When this occurs, the appropriate page opens automatically on the computer of the appropriate customer service representative. For example, if a customer calls to inquire about a sales order, the system might open a PeopleSoft CRM Interaction Management 360-Degree View page with that sales order displayed, if you have configured CTI to trigger that response; or the system might open a PeopleSoft CRM Sales page, if you have configured CTI to trigger that response.

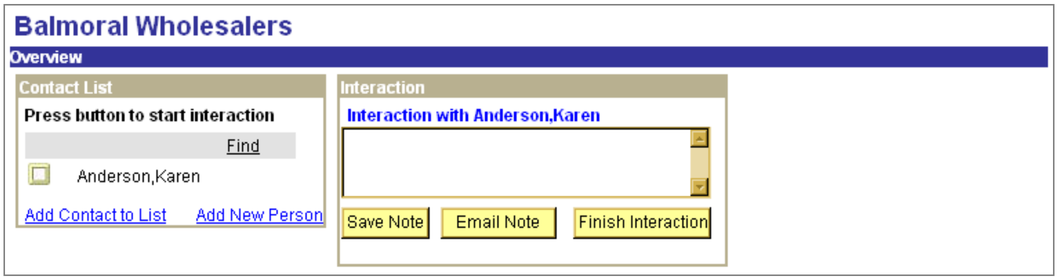
Note. If you are using the Enterprise Portal, you can return directly to the 360-Degree View page (with the current customer's information displayed) by clicking PeopleSoft CRM Interaction Management on the portal navigation bar.

For more information about Computer Telephony Integration (CTI), see the Configuring CTI Application Pages chapter in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

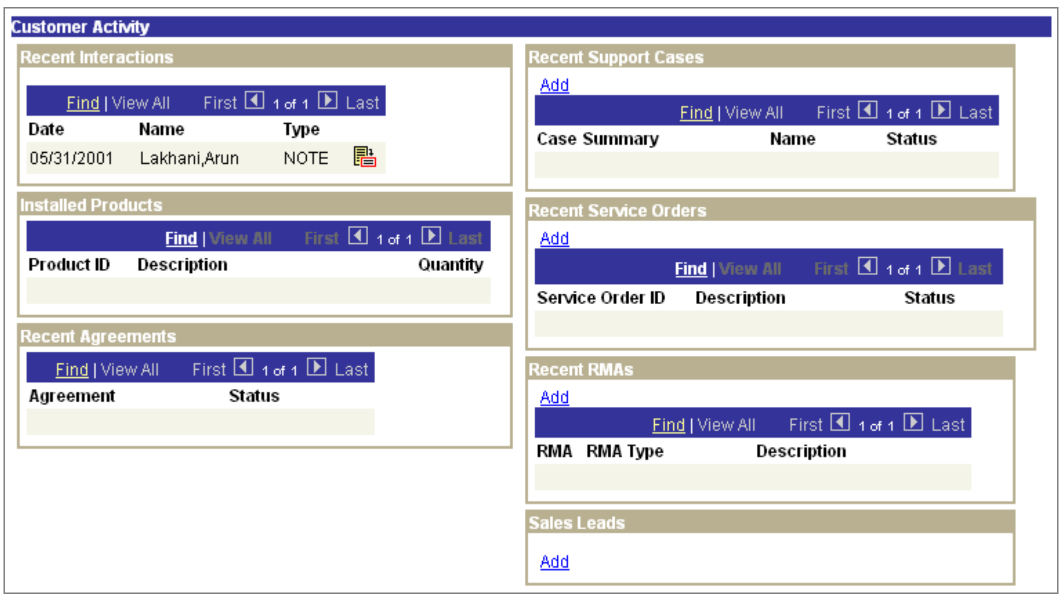
360-Degree View page

Usage	Use the 360-Degree View page to access interaction information about a single customer from multiple pages in multiple applications.

Object Name	RI_CIC_HOME
Navigation	**360-Degree View**



360-Degree View page (page 1 of 2)



360-Degree View page (page 2 of 2)

Overview Area

The Overview area contains general information about the customer, plus a history of the customer's interactions.

Contact List Subpage

The **Contact List** subpage contains a list of contacts associated with the customer. You can view up to five contact names at a time. To find a particular contact, click **Find.**

To associate a new contact with the customer, click **Add Contact to List.** You'll be taken to the Contacts page.

All contacts are first defined as persons in your system; a user cannot create a contact that is not already defined as a person. To add a new person, click **Add New Person.** You'll be taken to the Worker component. Once you have defined a new person, you can create a contact for that person, and add that contact to the Contact List.

	Click the button to the left of a contact name to start an interaction. The system then starts an interaction and makes the **Interaction** region editable.

Interaction Subpage

You can enter interactions in the **Interaction** subpage.

Enter notes about the interaction in the text box.

Save Note	Click the **Save Note** button to save the interaction.
Email Note	Click the **Email Note** button to send the interaction to interested parties. The system takes you to the Send Notification page, where you can set up delivery of the note.
Finish Interaction	Click the **Finish Interaction** button to refresh the interaction subpage.

Note. Before you start an interaction, the system displays no fields or labels in the Interaction subpage, except the header label **Interaction.**

For more information about the Send Notification page, see the Defining Workflow chapter in the *PeopleSoft CRM Application Fundamentals PeopleBook*.

Customer Activity Region

Customer Activities consists of subpages that contain links to source pages in various PeopleSoft applications. Those links lead directly to application pages populated with data from records that you select on the 360-Degree View page.

Important! If you have not installed the application that corresponds to a PeopleSoft CRM Interaction Management subpage, the system will not populate that subpage with data.

Recent Interactions Subpage

In this subpage, you can view the most recent interactions created for the customer.

Date	Date when interaction took place.
Name	Person who represented the customer in the interaction.

Type	Type of action taken in the first sub-interaction of the interaction. For some sub-interactions, this field will be a link to the object created/updated.
	Click the **Edit this Interaction** icon to access the Interaction Details page, where you can edit the interaction.

For more information about the Interaction page, see Interaction Page. **For more information** about interactions, see Understanding Interactions.

Recent Support Cases Subpage

In this subpage, you can view the most recent support cases opened for the customer.

Add	Click **Add** to access the Add a New Case page, where you can create a support case for the customer.
Case	Identifier of the support case. Click the case code to access the Case page, where you can edit the support case.
Summary	Summary of the support case.
Name	Contact who represented the customer in the support case.
Status	Position of the support case in the case creation process.

For more information about PeopleSoft CRM Support, see PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook.

Installed Products Subpage

In this subpage, you can view products installed for the customer.

Product ID	Identifier of the installed product. Click **Product** to access the Installed Product page, where you can edit the agreement.
Description	Description of the installed product.
Quantity	Number of units of the installed product.

For more information about installed products, see PeopleSoft CRM FieldService PeopleBook.

Recent Service Orders Subpage

In this subpage, you can view service orders created for the customer.

Add	Click **Add** to access the Service Order page, where you can create a service order for the customer.

Service Order ID	Identifier of the service order. Click the service order code to access the Service Order page, where you can edit the service order.
Description	Description of the service order.
Status	Position of the service order in the service order creation process.

For more information about installed products, see PeopleSoft CRM FieldService PeopleBook.

Recent Agreements Subpage

In this subpage, you can view agreements created for the customer.

Agreement	Identifier of the agreement. Click the agreement code to access the Agreement page, where you can edit the agreement.
Status	Status of the agreement: ***Available, Obsolete,*** or ***Processing.***

For more information about agreements, see PeopleSoft CRM Sales PeopleBook.

Recent RMAs Subpage

In this subpage, you can view RMAs created for the customer.

Add	Click **Add** to access the RMA Form page, where you can create an RMA for the customer. The customer used to create an RMA must be a Ship-To Customer.
RMA	Identifier of the RMA. Click the RMA code to access the RMA Header page, where you can edit the RMA.
RMA Type	Action taken in response to the RMA. You have four options: ***Advanced Exchange:*** Immediately create a replacement order for the item that the customer is returning. You can replace the returned item with another instance of the same item, or with different items. ***Repair and Return:*** Repair and return (to the customer) the returned item. ***Return and Replace:*** Create a replacement order only after you receive the returned item. You can replace the returned item with another instance of the same item, or with a different item.

	Return to Stock: Receive returned item and return it to your inventory, without replacing or returning it to the customer.
Description	Description of the RMA.
Status	Position of the RMA in the return process.

For more information about RMAs, see PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook.

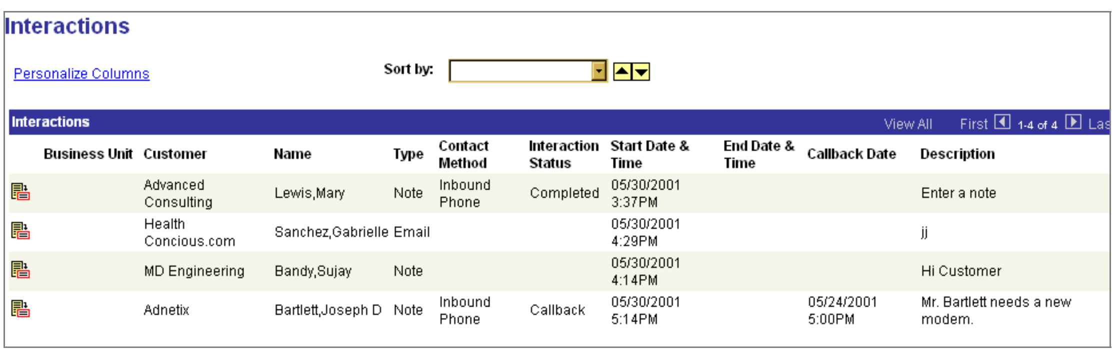
Sales Leads Subpage

Click **Add** to access the Lead Entry page, where you can add a sales lead.

For more information about sales leads, see PeopleSoft CRM Sales PeopleBook.

Interactions Page

Usage	Use the Interactions page to access interactions.
Object Name	RI_INTERACT_HOME
Navigation	***Manage Interactions, Manage Interactions, Interact, Interactions***


Interactions

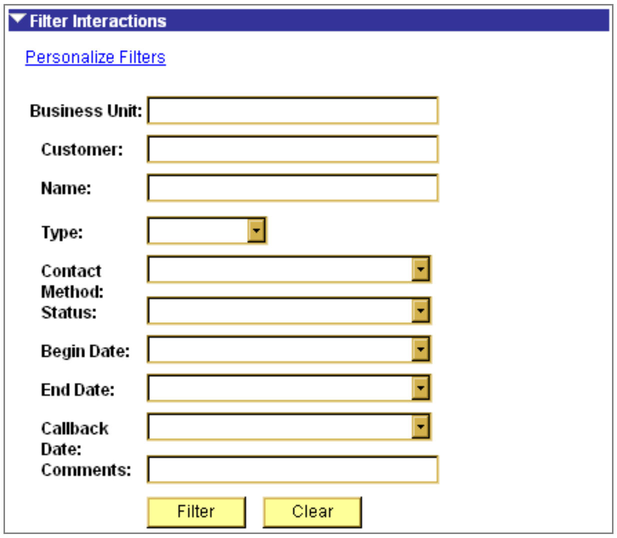
Personalize Columns

Sort by:

Interactions View All First 1-4 of 4 Las

Business Unit	Customer	Name	Type	Contact Method	Interaction Status	Start Date & Time	End Date & Time	Callback Date	Description
	Advanced Consulting	Lewis,Mary	Note	Inbound Phone	Completed	05/30/2001 3:37PM			Enter a note
	Health Concious.com	Sanchez,Gabrielle	Email			05/30/2001 4:29PM			jj
	MD Engineering	Bandy,Sujay	Note			05/30/2001 4:14PM			Hi Customer
	Adnetix	Bartlett,Joseph D	Note	Inbound Phone	Callback	05/30/2001 5:14PM		05/24/2001 5:00PM	Mr. Bartlett needs a new modem.

Interactions page (page 1 of 2)



Interactions page (page 2 of 2)

Click **Personalize Columns** to access the Personalize Columns page, where you can specify which fields appear in the **Interactions** region. For example, you might display the **Customer** field but not the **Name** field.

For more information about the Personalize Columns page, see Personalize Columns Page.

Sorting Interactions for Display

The system bases interaction sorting order on the **Sort By** parameters that you define. This determines the order in which interactions are displayed in the Interactions region.

To define interaction sorting order:

1. Select the interaction attribute that governs sorting order; the key attribute.

   For example, if you select ***Business Unit,*** the system sorts interactions by business unit. Or select ***Start*** or ***End*** to sort interactions in chronological order.

2. Select the direction in which the system sorts campaigns—in ascending order (low values first) or descending order (high values first).

Interactions Region

The system displays those columns that you have chosen (on the Personalize Columns page) to display. Records are sorted in the order that you have specified on the **Sort By** field.

For information about the columns that the system can display in the Interactions region, see Personalize Columns Page.

Filter Interactions Region

You can narrow the selection of interactions that appears in the Interactions region by setting parameters in the **Filter Interactions** region. For example, you might choose to view only interactions that started during the current fiscal year; or you might narrow the selection further, to interactions that started during the current fiscal year and that have the status ***Completed.***

Personalize Filters Click **Personalize Filters** to access the Personalize Filters page, where you can specify which filter fields appear in the **Filter Interactions** region of this page.

For more information about the Personalize Filters page, see Personalize Filters Page.

The system displays those columns that you have chosen (on the Personalize Filters page) to display.

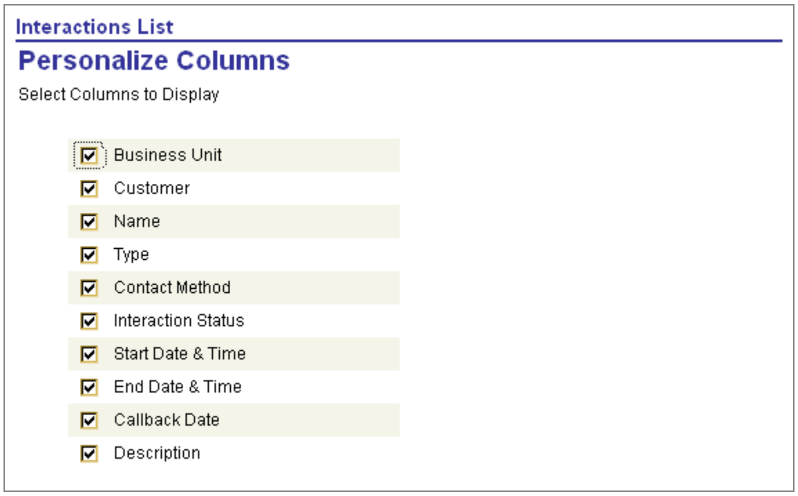
Filter When you push the **Filter** button, the system displays (in the **Interactions** region) only those interactions that match the values that you have entered in the **Filter Interactions** region.

For example, if you select the value ***Inbound Email*** in the **Contact Method** field, the system displays only interactions that are initiated with inbound email.

Clear Show all interactions, without regard for the parameters that you have entered in the **Filter Interactions** region.

Personalize Columns Page

Usage	Use the Personalize Columns page to specify which fields appear in the Interactions region of the Interactions page. Personalizing pages helps you focus on the information that is most important to you.
Object Name	RSF_USER_FIELDS
Navigation	Click Personalize Columns on the Interactions page.



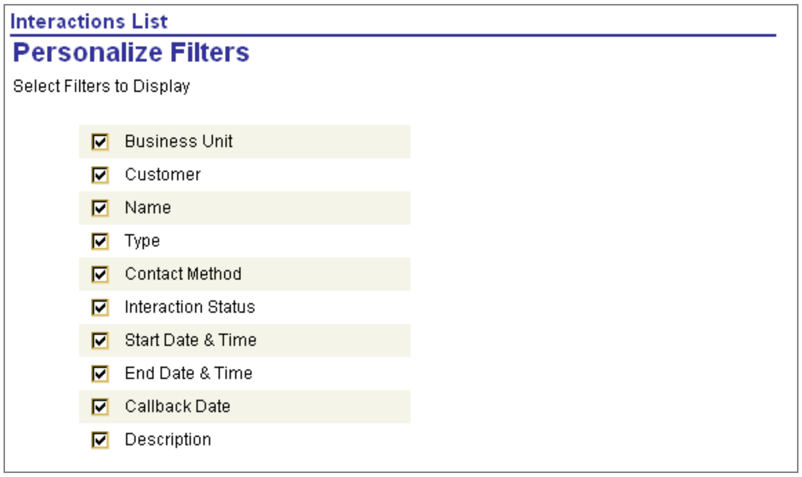
Personalize Columns page

Select the check boxes of the interaction details that you want to display in the Interactions region of the Interactions page. Clear the check boxes of those campaign details you want to hide from view.

Business Unit	Business unit in which the interaction resides.
Customer	Customer associated with the interaction.
Name	Contact associated with the interaction.
Type	Type of interaction. For example, *Case, Outbound Email,* or *Service Order.*
Contact Method	Means of communication by which interaction is initiated. For example, *Inbound Email, Inbound Fax,* or *Outbound Phone.*
Interaction Status	Position of interaction in its life cycle. For example, *In Process, Busy,* or *Completed.*
Start Date & Time	Date and time when the interaction began.
Start Date & Time	Date and time when the interaction ended.
Callback Date	Date when user intends to respond to the interaction.
Description	Description of the interaction.

Personalize Filters Page

Usage	Use the Personalize Filters page to determine which filter fields appear in the Filter Interactions region of the Interactions page.
Object Name	RSF_USER_FILTERS
Navigation	Click Personalize Filters on the Interactions page.

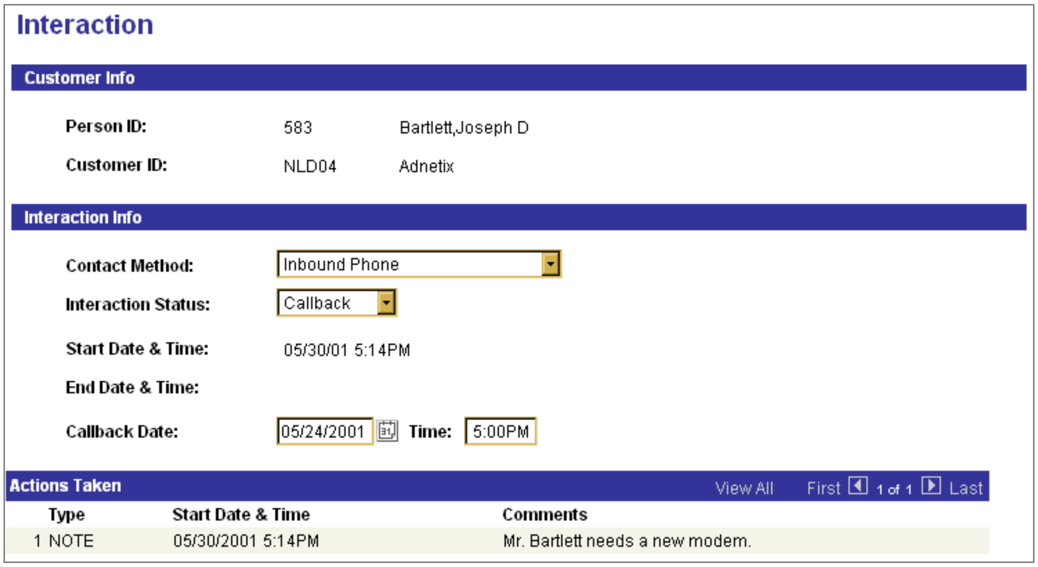


Personalize Filters page

Business Unit	Business unit in which the interaction resides.
Customer	Customer associated with the interaction.
Name	Contact associated with the interaction.
Type	Type of interaction. For example, *Case, Outbound Email,* or *Service Order.*
Contact Method	Means of communication by which interaction is initiated. For example, *Inbound Email, Inbound Fax,* or *Outbound Phone.*
Interaction Status	Position of interaction in its life cycle. For example, *In Process, Busy,* or *Completed.*
Start Date & Time	Date and time when the interaction began.
Start Date & Time	Date and time when the interaction ended.
Callback Date	Date when user intends to respond to the interaction.
Description	Description of the interaction.

Interaction Details Page

Usage	Use the Interaction Details page to enter details about interactions.
Object Name	RI_INTERACTION
Navigation	Manage Interactions, Manage Interactions, Interact, Interaction Details
Prerequisites	Define an interaction.
Access Requirements	Select an interaction.



Interaction Details page

Customer Info Region

Person ID — Contact who represents the customer in the interaction.

Customer ID — Customer associated with the interaction.

Interaction Info Region

Contact Method — Select the means of communication by which the interaction is initiated. For example, ***Inbound Email, Inbound Fax,*** or ***Outbound Phone.***

Interaction Status — Select the position of the interaction in its life cycle. For example, ***In Process, Busy,*** or ***Completed.***

When you select the interaction status ***Completed,*** the system populates the **End Date & Time** field.

Start Date & Time — Date and time when the interaction began.

End Date & Time — Date and time when the interaction ended.

Callback date — Date when you intend to respond to the interaction.

Time — Time when you intend to respond to the interaction.

Actions Taken Region

Type — Type of action taken in each sub-interaction of the interaction.

Fields in the **Actions Taken** region vary based on action type. For example, if the action is a ***NOTE,*** the system displays the start date and time when the note was written, and the text of the note.

Index