



PeopleSoft 8 CRM Application Fundamentals PeopleBook

PeopleSoft 8 CRM Application Fundamentals PeopleBook

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ABOUT THIS PEOPLEBOOK

The book provides you with the information that you need to implement and use PeopleSoft CRM Application Fundamentals. You can order the online version by requesting SKU CRMB8R0 or the print version by requesting SKU CRMr8CCRM-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 CRM 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.

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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

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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 <code>DETAIL_CALENDAR1</code> .
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 Application Fundamentals PeopleBook

In this PeopleBook, we'll provide you with the basic information to set up and use the common application elements for the products that make up the PeopleSoft 8 CRM group of applications. Whether you are implementing the entire suite of CRM applications or using specific ones, these chapters will help you to understand important concepts and procedures that are generic to PeopleSoft 8 CRM.

PART: CRM Common Application Elements

Using PeopleSoft CRM Common Elements describes certain features that appear in several PeopleSoft CRM applications: time zones display, notes and attachments, and branch scripts.

Using Worklists and Notifications explains how to use worklists and notifications to perform actions associated with other CRM components like service orders, support cases, and so on.

Tracking Time Spent on Service Orders and Cases shows how you can log the actual labor time associated with performing the work for each service order line or case using the Manage Time component.

Managing Solutions describes how to create and maintain a set of solutions that helps your organization resolve customers' problems quickly and efficiently.

PART: General Options

Setting General Options explains some of the basic set up procedures for tables and processing rules for PeopleSoft CRM applications using pages in the Define General Options menu.

Setting Up Security explains the flexibility of multilevel security to provide an efficient, effective solution to your security issues.

Maintaining Currencies and Market Rates shows you how to calculate market rates and manage financial information in multiple currencies, including the euro.

PART: Workforce Management

Managing Workers provides instruction on how to track a worker throughout CRM according to their person ID. A worker can be an employee of your company, a non-employee like a contractor or a consultant, or a third party worker providing services to your company.

Establishing Cost Categories for Workers explains how to define cost categories that can be used to account for the labor costs incurred by your organization.

Setting Up and Maintaining Provider Groups and Group Members shows you how provider groups are used in the system, and gives you detailed information on the prerequisite steps for creating provider groups and group members.

Managing Workforce Competencies describes methods of defining competency information for the members of your workforce and documents the pages used to manually define and view competency information in PeopleSoft CRM.

Using Resource Calendars details how work schedules are recorded on your workers' resource calendars and describes how holidays can be inserted in the resource calendars.

Setting Up and Performing Task Assignment Searches documents the algorithms the system uses to find the members of your workforce who are best suited for assignment to a case in PeopleSoft CRM Support or PeopleSoft CRM HelpDesk or to a service order in Peoplesoft FieldService.

PART: Customer and Contact Management

Managing Customer Information provides instruction on how to manage your customer information with a focus on the relationship that customer has to your company. You can integrate this information with PeopleSoft Supply Chain Management, PeopleSoft Financials, or another external system.

Maintaining Contacts explains how to set up and maintain contact information for internal and external contacts.

PART: Product and Item Management

Setting Up Products shows how to describe, group, and analyze your product information quickly and effectively.

Defining Items describes methods of item definition, explains how item status is used, and documents the pages used to manually define items and view item definitions.

Working With Item Assemblies explains how you can define item service assemblies to identify the components of an item that your organization can service or support.

Checking Item Balances and Availability provides information on how you can set up and check real-time balance information for items.

Tracking Installed Products gives procedures to set up installed products records to track the products installed at a customer's site or the products issued to an internal worker.

PART: Agreement and Warranty Management

Defining Pricing Information for Services and Support Offerings explains how to define pricing records for the services and support offerings provided by your organization.

Setting Up and Managing Agreements and Warranties provides instructions on how to define the services or support the customer is entitled to and the duration of the contract.

Performing Entitlement Searches for Cases and Service Orders explains how the system finds warranties and agreement lines that match criteria entered on the case or service order.

PART: Process Automation

Defining Workflow gives instruction on how you can control things such as how many actions are assigned to an event, the timing of these actions, who gets a notification or an entry in their worklist, and so on.

Defining Branch Scripts explains how you can create scripts with branching logic to determine which question to ask based on the response to the previous question. You can use scripts as surveys, as problem-solving techniques, and as upsell scripts (to determine when a customer should upgrade to a newer version of a product).

Configuring CTI Application Pages provides tools to deploy computer/telephony integration (CTI) features including screen-based call management and prepopulated application pages.

Managing PeopleSoft CRM Search shows you how to create the set of special directories and files that the search engine uses to find and display source documents that match the criteria that you enter on the search page.

Defining Integration for PeopleSoft CRM gives you instructions on how to set up your CRM applications to integrate with other PeopleSoft application databases as well as third-party applications.

CHAPTER 2

Using PeopleSoft CRM Common Elements

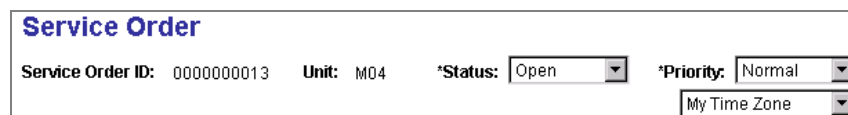
This chapter describes certain features that appear in several PeopleSoft CRM pages.

Working With Time Zones

Time fields throughout PeopleSoft CRM display a time zone abbreviation next to the time. When you first access a page that displays times, you see the times in your local time zone. Sometimes, however, you need to see times in another time zone—most often the customer's time zone. For example, if you're scheduling a service call, you need to tell the customer the time of the service call in terms of the customer's time zone, not your own time zone.

Many PeopleSoft CRM pages provide a time zone control field that you can use to adjust all times displayed on the page. You change the time zone by choosing the person whose time zone to use.

The time zone control field is located in the page header. The field is unlabeled, but you can recognize it by its default value: *My Time Zone*.



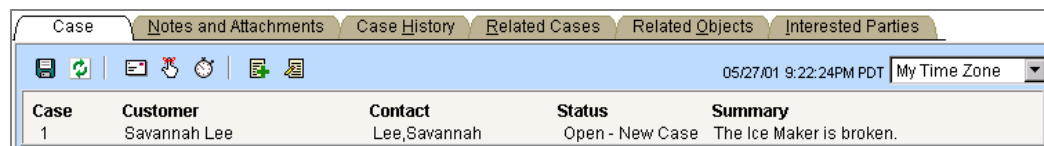
Service Order

Service Order ID: 0000000013 Unit: M04 *Status: Open *Priority: Normal

My Time Zone

Setting the time zone in a service order (RF_SERVICE_ORDER)

On the Case page (in both PeopleSoft CRM Support and PeopleSoft CRM HelpDesk), the time that you opened the component appears next to the time zone control field.



Case Notes and Attachments Case History Related Cases Related Objects Interested Parties

05/27/01 9:22:24PM PDT My Time Zone

Case	Customer	Contact	Status	Summary
1	Savannah Lee	Lee,Savannah	Open - New Case	The Ice Maker is broken.

Setting the time zone in a support case (RC_CASE_SW)

To change the time zone display, select a time zone from the drop-down list box. Changing the time zone affects the time displayed on the page for all time fields in the component. Changing the time zone does *not* affect the underlying data, only how that data is displayed.

The available time zones vary by component. All components that support time zone processing offer the following choices.

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. If the contact is associated with more than one of the customer's addresses, the system uses the address designated as primary.

PeopleSoft does not determine the time zone based on the city or postal code.

The Case page in PeopleSoft CRM Support and PeopleSoft CRM HelpDesk offers the following additional options.

Assigned Agent

The time zone of the agent currently assigned to the case. This is derived from the agent's location. This is useful if you're reviewing a case assigned to someone else and you want to contact the assigned agent to ask a question about the case.

Previous Agent

The time zone of the agent previously assigned to the case. This is useful if you are working on a case and you need to contact the agent who was working on the case before you.

For more information about establishing worker time zones, see Personal Address/Phone/Email Page in the "Managing Workers" chapter. **For more information** about establishing customer time zones, see Address Page in the "Managing Customer Information" chapter. **For more information** about time zone management in all PeopleSoft applications, see Understanding Time Zones in the *Globalization PeopleBook*

Adding Notes and Attachments

The ability to record notes and attach files to those notes is often essential for your work. PeopleSoft CRM provides a standard interface for working with notes and attachments across all the components that require this functionality.

Understanding Attachments

Attachments are normally associated with a note rather than being directly associated with the note's parent object. For example, you create case attachments as part of a case note, not as part of a case.

There are some exceptions to this. For example, solutions do not have notes, only attachments. Therefore, solution attachments are associated directly to a solution.

When you add an attachment to a component, you must identify the file to be attached. Once you identify the file, the system uploads the attachment to your PeopleSoft attachment server. Storing all attachments on a central server ensures that the attachment is available to all users.

When you click the link for an existing attachment, the system launches the attachment. If the attachment is a .exe or a .bat program, the system runs the program. If the attachment is any other type of file, the system handles the file according to your operating system's rules, either opening the file in a new browser window, prompting you for a location to download the file, or offering you a choice between these two actions.

In order to support attachments, your organization must set up a server to store attachments. Your organization must also configure the system to access the server. To configure the system, use the URL Maintenance page to specify a URL for each component that supports attachments.

Files stored as attachments have two names. The original name of the file at the time it was uploaded is stored in the ATTACHUSERFILE field. A system-generated unique file name is stored in the ATTACHSYSFILENAME field. Because this name is guaranteed to be unique, this is the actual name of the file on the file server. The different objects that store attachments have different file-naming patterns for generating the ATTACHSYSFILENAME value, but all file-naming patterns are based on the ATTACHUSERFILE file name.

For example, system names for case attachments are formed by concatenating the case number, the letter *C*, the note sequence number, the letter *R*, the attachment sequence number, and the original file name. This pattern is represented by the following code:

```
CASE_ID | "C" | NOTE_SEQ_NBR | "R" | ATTACH_SEQ_NBR | ATTACHUSERFILE
```

For more information about setting up a server to store attachments, see your PeopleSoft CRM installation documentation.

Understanding Notes and Attachments Display Options

Different components have different ways of displaying notes and attachments:

- Some components have a page just for notes related to the component. The name of this page can vary, but it always includes the word *Note*. For example, the Service component in PeopleSoft CRM FieldService and the Case component in PeopleSoft CRM Support and PeopleSoft CRM HelpDesk all have Notes and Attachments pages.
- Some components incorporate notes into a page that includes other elements as well. For example, the Service Activities page in the Service component includes such a region. This region displays notes that are specific to the service activity. More general notes about the service appear in the Notes and Attachments page in the Service component.

Regardless of where notes and attachments appear, the system uses the following formats to display information about the notes. Not all formats are available in all instances of notes and attachments.

View	Description	Usage
Note details	The note details view displays complete information for a single note, including a list of attachments associated with the note. Resolution notes also display the resolution summary, which is a link to the associated resolution.	Use this view to create or update notes, to add attachments to notes, or to review existing notes and attachments in detail.
Notes summary	The notes summary view displays a concise list of all existing notes. The page provides a one-line summary of pertinent information for each note. The summary view uses a paperclip icon to indicate notes that have associated attachments. Case notes can be associated with the case itself or with a resolution in the case. The notes summary view in the Case component displays both types of notes together. A resolution icon identifies notes that are part of a resolution.	Use this view to quickly review all notes associated with an object and to locate specific notes to which you can then drill down. In some components, you can also use this page to send selected notes to a specified recipient's email address or worklist.
Attachments summary	The attachments summary view displays a concise list of all attachments associated with the component, along with a summary of the associated note. Whereas the note details view displays attachments associated with the currently displayed note, the attachments summary view displays all attachments without regard to the associated note. Not all components have the Attachments Summary. For example, Service notes, Service Activity notes, and RMA notes do not display the attachment summary.	Use this view to quickly review all attachments associated with an object and to locate specific attachments. You can open attachments and their associated notes from this page.

The following sections describe these three views in more detail. The exhibits are from the Notes and Attachments page in Case component in PeopleSoft CRM Support. Other pages may have a slightly different appearance.

Note. Not all fields appear in all components.

Note Details View

Summary of Notes Summary of Attachments

Notes Find | View All First 1 of 3 Last

Added: 04/22/2001 12:08PM PDT STEWART,TOM

***Summary:** Sent customer attached brochure with information on new refrigerators

Details:

***Visibility:** All **Note Type:** Sort By:

Attachments

File Name	Description	Added By	Date Added
refrigerators.pdf	sales brochure for new refrigerator	STEWART,TOM	04/22/2001 12:10:05PM PDT

Attach a file

Add Note or Attachment

Note details view in the Case - Notes and Attachments page (RC_CASE_NOTE)

Links to Other Notes and Attachments Views

Summary of Notes

Click this link to transfer to the notes summary view.

Summary of Attachments

Click this link to transfer to the attachments summary view. This functionality is not available in all components.

Notes

When you use the note details view to scroll through notes, notes appear in reverse chronological order (that is, the most recently added note appears first).

Added

The date and time when the note was added and the name of the person who added the note.

Resolution Summary

Case notes can be associated with the case as a whole or with a specific case resolution. If the note is associated with a resolution, the resolution summary appears in the note details view. The resolution summary is a link; click the link to go to the resolution.

To create a note that is part of a resolution, you must go to the resolution details page and click the Add Note button there.

Summary

A short summary of the note. If you do not enter a value, the first fifty characters of the **Details** field will be entered into this field when you save the note.

Details

The full text of the note.

Visibility The type of users who have access to this note. Select *All* if there are no access restrictions. Select *Internal* to hide the note from customers who access the object using self-service.

Note Type A classification for the note. Valid values are defined differently in different pages. For example, valid values for case notes are defined by your organization in the Note Type page and are based on the business unit of the parent object, while valid values for campaign notes are part of the field definition.

This functionality is not available in all components.

Add Note or Attachment Click this button to create a new (blank) note. This button does not add an attachment to the current note; it creates a new note to which you can add attachments.

Attachments

The **Attachments** grid displays only the attachments associated with the current note. To view a list of all attachments, independent of their associated notes, use the attachments summary view.

Sort By The criteria by which the attachments are sorted. Select a value to immediately sort the attachments according to the specified criteria. You can sort by *Added By*, *Date Added*, *File Descr* (File Description), or *File Name*.

File Name The name of the file. (This is the file's original name, not the system-generated name used to ensure unique file names on the server.) The system automatically enters the file name when you create the attachment. The file name is also a link to the file; click the link to access the attachment.

Description Descriptive information about the file. Enter a description if the file name is not descriptive enough. This field can contain up to 35 characters. If you need additional descriptive text, use the note for that information.

Added By The name of the person who added the attachment.

Date Added The date that the attachment was added.

Delete Click this button to delete the attachment. Deleting an attachment not only removes the reference to the attachment, it also deletes the file from the file server.

Attach a File Click this button to add a new attachment.

For more information about attachments, see Understanding Attachments in this chapter.

Notes Summary View

[Summary of Attachments](#) Sort By: Date Added

Notes Summary				
Select	Summary	Visibility	Added By	Date Added
<input type="checkbox"/>	Changed resolution status to Withdrawn.	All	Pine,Teresa P	05/22/2001 5:39PM PDT
<input type="checkbox"/>	Sent customer attached brochure with information on new refrigerators	All	Pine,Teresa P	05/22/2001 5:29PM PDT
<input type="checkbox"/>	Customer is cancelling service call.	All	Pine,Teresa P	05/22/2001 5:28PM PDT
<input type="checkbox"/>	Opened service order	Internal	Pine,Teresa P	05/22/2001 5:28PM PDT

☒ [Select All](#) ☐ [Clear All](#)

Email Selected Notes
Add Note or Attachment

Notes summary view in the Case - Notes and Attachments page (RC_CASE_NOTE)

Summary of Attachments	Click this link to transfer to the attachments summary view.
Sort By	The criteria by which the notes are sorted. Select a value to immediately sort the notes according to the specified criteria. You can sort by <i>Added By</i> , <i>Date Added</i> , <i>Summary</i> , or <i>Visibility</i> .
Select	Select this check box to identify individual notes that you want to send to someone. Selected notes are not sent until you click the Email Selected Notes button.
	The presence of this icon indicates that there are attachments associated with the note.
	This icon appears only in the Notes and Attachments page in the Case component of PeopleSoft CRM Support and PeopleSoft CRM HelpDesk. It indicates that the note is associated with a specific resolution rather than with the case itself.
Summary	The summary of the note entered in the note details view. The summary is also a link that you can click to view the note details.
Visibility	The note visibility entered in the note details view.
Added By	The name of the person who added the note.
Date Added	The date and time when the note was added.
Select All	Click this link to select the Select check box for all notes.
Clear All	Click this link to clear the Select check box for all notes.
Add Note or Attachment	Click this button to create a new (blank) note. This button does not add an attachment to the current note; it creates a new note to which you can add attachments.

Email Selected Notes

Click this button to send selected notes (but not the associated attachments) to a recipient that you specify. All selected notes are sent, regardless of the **Visibility** setting.

When you click this button, the system displays the Send Notification page, where you can select a recipient and a delivery method (email or worklist). You can review and edit the message text before sending the notification.

The default notification text depends on the component. When you email notes from a case, the default text comes from the SEND_SELECTED_NOTES email template. In other components, the default text is hard-coded.

Attachments Summary View

Summary of Notes				
Attachments Summary				
File Name	Description	Added By	Date Added	Associated Note
refrigerators.pdf	Sales brochure for new refrigerator	STEWART,TOM	05/29/2001 9:47AM PDT	Sent customer attached brochure with information on new refrigerators
Add Note or Attachment				

Summary of Attachments view in the Case - Notes and Attachments page (RC_CASE_NOTE)

Not all components provide an Attachments Summary view. In those that do, the **Attachments Summary** grid provides a list of all attachments associated with the object. (In the note details view, you are limited to seeing the attachments associated with a specific note.)

Most of the fields are identical to those in the attachments grid of the note details view. The only element unique to this page is the **Associated Note** column, which displays the summary of the note associated with the attachment. Click the link in the **Associated Note** column to display the note details.

Click the link in the **File Name** column to launch the file in a new browser window.

Working With Notes and Attachments

The following procedures provide additional information to help you take full advantage of notes and attachments functionality.

To email notes:

1. In the notes summary view, select the notes to be sent.
2. Click the Email Selected Notes button.

The Send Notification page appears. Information about the note appears in the **Message** field. In PeopleSoft CRM call center applications, the message text comes from the SEND_SELECTED_NOTES email template. Other applications that enable you to email selected notes do not use email templates; they use a hard-coded message as the default notification text.

For more information about email templates, see *Creating Email Templates in the PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook*.

3. Fill out the notification parameters on the Send Notification page.

This is the standard Send Notification page used throughout PeopleSoft CRM applications. On this page, specify the recipients and the delivery mechanism (email or worklist). You can also modify the subject and message.

For more information about how to complete the notification parameters, see *Understanding Notifications in the "Using Worklists" chapter*.

4. Click the Send Notification button.

The system sends the message and displays a confirmation message.

To add an attachment to a note:
--

1. Access the note details for the note with which the attachment will be associated.

You can attach a file to a new or existing note.

2. In the note details view, click the **Attach a File** button.

The Attach File page appears. This page has a field where you enter the full path (including the file name) of the file you want to attach.

3. On the Attach File page, click the **Browse** button.

The Choose File dialog box appears.

4. In the Choose File dialog box, select a file and click **Open**.

After you select the file, the Attach File page reappears. The system has entered full file path (including the file name) of the file to be uploaded.

5. On the Attach File page, click the **Upload** button.

The system uploads the specified file to the server that's been configured to store all of your PeopleSoft CRM attachments. Large files may take a long time to upload. When the upload is complete, the system displays the note details view again. If the upload was successful, the file appears in the attachment grid.

6. Add descriptive information about the file.

In the note details view, enter a **File Description** for the attachments and add any comments to the note with which the attachment is associated.

7. Save the component.

Running Branch Scripts

Scripts are standardized sets of questions that you can ask your customers. The scripts that you use in PeopleSoft CRM are *branch scripts*; that is, they incorporate branching logic so that the answer to one question determines which question appears next.

This section explains the general process of running a script. The documentation for components that offer access to scripts provides additional information specific to the individual components. This section does not describe how your organization creates scripts.

For more information about creating branch scripts, see the Creating Branch Scripts chapter.

Understanding Script Usage

There are three types of branch scripts in PeopleSoft CRM applications.

Surveys are general-purpose scripts used for gathering information from your customers. You can start surveys from the following pages:

- In PeopleSoft CRM Support and PeopleSoft CRM HelpDesk, you can start surveys from the Related Objects page.
- In PeopleSoft CRM Sales, you can start surveys from the Sales Lead Details page.

The other two types of scripts, problem solving techniques and upsell scripts, are used only in PeopleSoft CRM Support and PeopleSoft CRM HelpDesk.

Problem solving techniques are troubleshooting scripts used to help solve cases. Call center agents access problem solving techniques from the Related Objects page or from Solution Advisor.

Upsell scripts help you determine if a customer should be advised to upgrade to a newer product. The scripts are always associated with specific products. Call center agents access upsell scripts from the Case component by clicking the flashing Upsell button that appears when the case meets your organization's upsell criteria.

At the time a script is created, it is classified as persistent or disposable. If a script is persistent, the system saves the responses that you record. If a script is disposable, the responses are not saved.

Identifying Scripts to Run

To run a branch script from the Sales Lead Details page or the Related Objects page, first identify the script to run, then click the button that displays the script on the Branch Script Execution page. You can run multiple scripts by adding another row to the scroll area that lists associated scripts. The field names and button names are specific to the originating page, but the process is the same in both places.

When you select a script, the system filters the valid values based on the script type and the business unit of the originating page. The Sales Lead Details page provides access to surveys only. The Related Object page provides access to all three types of scripts, but you must specify a script type before you select a specific script.

For more information about running scripts from the Sales Lead Details page, see Managing Leads in the *PeopleSoft CRM Sales PeopleBook*. For more information about running scripts from the Related Object page, see Working with Related Objects in the "Working Cases" chapter in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook*.

Understanding the Branch Script Tree

Branch scripts are visually represented as trees. The tree branches represent mutually exclusive paths through the script.

Each node in the tree represents a question, except for the final node on a branch, which represents a statement or action that ends the script. Nodes are identified by the ID and description established on the Branch Script Node Definition page.

The Branch Script Execution page displays the branch script tree on the left and details for the selected node on the right. The node details region displays the question and all possible answers. As you ask the questions, select the answer or answers that the respondent gives.

You can move from node to node in two ways:

- Ask each question in sequence.

After you enter the answer to the question, click the Next button to display the node that corresponds to the answer that you selected. To return to an earlier node, click the Previous button.

Certain nodes, called *survey nodes*, allow you to select more than one answer. For survey nodes, the next question does not depend on the answer that you enter; there is only one possible next question.

- Use the branch script tree to go directly to any node in the script.

Click any node in the branch script tree to go directly to that node. The system automatically records answers to each of the questions that precede the selected node. The answers are those that you would have had to enter in order to reach the selected node.

The branch script tree is a PeopleSoft tree control (not a PeopleSoft Tree Manager tree). The First, Previous, Next, Last, Left, and Right links help you navigate through the tree when the tree is too large to be displayed in its entirety.

For more information about using tree controls, see *Using PeopleSoft Applications*.

Understanding Actions in Scripts

Problem solving techniques are used only in call center applications (PeopleSoft CRM Support and PeopleSoft CRM HelpDesk). Nodes in problem solving techniques sometimes include optional actions that are specifically related to cases. There are two types of actions:

- You can view a suggested solution. When you take this action, the system displays the Case - Solution page, where you can review the solution and, optionally, bring the solution back to the case from which the script was launched.
- You can update the case status—for example, to close a case based on the respondent's answers.

If there are actions associated with a node, there is a Start Action button for each possible action. Click the button to perform the action.

Running Branch Scripts

To run a branch script:

1. Select a script on the appropriate page.
2. Launch the script.

To launch the script, click the button provided for that purpose.

The first question in the script appears.

3. Ask the respondent the question.
4. Enter the respondent's answer.
5. (Optional) If there are actions defined in the node, click the **Start Action** button.

Not all nodes offer actions, and you may not need to execute every action on a node.

6. Click the **Next** button to move to the next node.

The system determines which question to ask next based on the answer to the current question. If this is the final node of a branch, there is no **Next** button.

7. Repeat steps 3–6 as necessary.

You can end the script at any point; you do not have to answer every question.

8. Click the **Save** button to return to the originating page.

You can always return to the Branch Script Execution page to review the answers, to ask additional questions, or to change previous answers.

Branch Script Execution Page

Usage	Use the Branch Script Execution page to run any type of branch script. The exact title of the page varies depending on the type of script that you are running.
Object Name	RC_RUN_BSCRIPT_PNL
Navigation	<ul style="list-style-type: none"> On the Sales Lead Details page, enter a survey name and click the Run Survey button. On the Case - Related Objects page, launch a new script by identifying the script and clicking the Initiate Script button. On the Case - Related Objects page, reopen a script that has already been run by clicking the Details button. On any page of the Case component, click the flashing icon that appears when the criteria for an upsell opportunity are met.

Execution for Survey Script

Survey Information

Instance Number: 308 Script Name: CC_SERVICE_SURVEY Status: Started Language Code: English

Survey Tree

First | Previous | Next | Last | Left | Right

SURVEY SERVICE 1 - How was your Service today?

- SURVEY SERVICE 4 - Fair
- SURVEY SERVICE 3 - Bad
- SURVEY SERVICE 2 - Good

Question: How was your service today?

☐ Good
☐ Bad
☐ Fair

Comment:

Next

Save

[Return to Case](#)

Last Modified: 05/01/2001 11:02AM PDT DVP1

Branch Script Execution page

Branch Script Information

The title of the general information group box changes depending on the type of script that you're running.

Instance Number	The unique identifier for the current instance of the branch script.
Script Name	The name of the script.
Status	The script status. When you start a new script, the system sets the status to Started . After you click the Save button, the system sets the status to Processing . You can set the status to Completed to indicate that you have finished conducting the survey.
Language Code	The language of the script. Changing the language setting does not change the language of the field labels or the branch script tree, it changes only the language of the questions, answers, action descriptions, and guide text (if the text is available in the selected language). Changing the language enables you to ask a respondent questions in the respondent's own language without changing the language of the page elements on the Branch Script Execution page.

Script Tree

Branch scripts are visually represented as trees. The Branch Script Execution page displays the branch script tree on the left and details for the selected node on the right.

The tree branches represent mutually exclusive paths through the script. As you move through the script, the system expands the nodes that correspond to your path through the script. You can also manually jump to any node by clicking that node in the tree.

The title of the tree region changes depending on the type of script that you're running.

Question and Answer Controls

The fields that appear to the right of the script tree vary depending on the elements that have been defined for the current node.

Question	A multiple-choice question that you ask the respondent. The possible answers to the question appear below the question. Depending on how the node was defined, you may be able to select one or more than one answer.
Guide	Additional text to help you understand the question and use the script. The final node in a script, which cannot have a question, often has guide text to help you conclude the question and answer session.
Action Name	If there are actions associated with the node, the page displays a description of the action. For example, problem solving techniques frequently have actions that display a suggested solution.

Start Action	<p>If you want to perform an action associated with the node, click this button. The nature of the action determines what happens when you click this button.</p> <p>There are two types of actions, both case-specific, that are associated with problem solving techniques. One action closes the originating case. The other action suggests a solution on the Case - Solution page.</p> <p>For more information about the Case - Solution page, see Problem Solving Technique Detail Pages in the "Using Solution Advisor" chapter in the <i>PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook</i>.</p>
Comment	<p>Respondents are limited to the answers that have been predefined for multiple-choice questions, but you can use this field to record any additional comments that the respondent has.</p>
Previous	<p>Click this button to move to the previous node in the script.</p>
Next	<p>Click this button to move to the next node in the script.</p>
Save	<p>Click this button to save the script. You can save your work at any time. If you leave the script and return later, you can start where you left off.</p>
Return to [originating page]	<p>Click this link to return to the page from which you started the script. If you return to the originating page without saving this page, the script answers are not saved.</p>

CHAPTER 3

Using Worklists and Notifications

A worklist is a collection of notifications that have been sent to you by other users much like email messages that are sent to an inbox. Worklists are organized to group all of the different kinds of actions that are associated with your job such as notifications, service orders, support cases, and so on. From a worklist, you can link to the component pages that are related to the work without having to search through your system. To view the underlying target page, click the link in the grid that lists your worklist items. The system navigates you to the service order or notification page where you can perform your task or read the message text of the notification. If there is a component linked to the notification, click the Linked Component link to display that component.

A worklist can contain information about tasks that you have to complete, messages regarding tasks that other users are performing, or tasks that have been completed or have changed in status. Depending on your role and security, you might have access to your individual worklist and you might also have access to a group worklist. A group worklist is accessible to every user who has been given permission to the group worklist.

From the worklist you can do the following:

- View the worklist items such as service orders, notifications, and return material authorizations that are in the queue.
- Mark worklist items as *worked*.
- Reassign worklist items to other people in your group.
- Link to the source transaction in the application.

Working with a group worklist is slightly different from working with an individual worklist. A group worklist is organized with a high-level summary area that enables you to display details for individual worklist items. From the group worklist, you view the individual items that pertain to you and forward them to your individual worklist, reassign them, or mark them as worked.

Note. If you are using the group worklist simultaneously with other users, it is possible that one user's changes might override your changes. It is a good idea to refresh the Group Worklist page on a regular basis to make sure that you are working with the most current information.

The Marked Worked and the Reassign buttons enable you to manage the items in a worklist that belong to you. If you've already completed your task, click Marked Worked to remove

the item. If the worklist item really belongs to someone else, click Reassign to have the item removed from the worklist and sent to another user's worklist.

To mark a worklist item as worked:

1. Open a worklist by selecting Worklist, Open Worklist, Use, My Worklist or Worklist, Open Worklist, Use, Group Worklist.
2. Select the check box next to the link for the item that has been worked.
3. Click the **Marked Worked** button.

The system removes the item from the worklist when it refreshes the page.

To reassign a worklist item to someone else:

1. Open a worklist by selecting Worklist, Open Worklist, Use, My Worklist or Worklist, Open Worklist, Use, Group Worklist.
2. Select the check box next to the link for the item to be reassigned.
3. Click the **Reassign** button.

The Addressing Dialog page appears.

4. Enter the **Person ID** of the person you are reassigning this item to.
5. Enter a comment that provides information about the reassignment.
6. Click **OK**.

The system removes the item from the list, refreshes the page, and displays it on the newly assigned person's worklist.

Worklist Page

Usage	The Worklist page provides summary information about all items on your personal worklist. This page also provides links enabling you to view additional details about the work, to perform the indicated work, and to reassign work items.
Object Name	RB_WF_ALL_WL, RB_WF_ACTNREQ_WL, RC_WF_CASE_WL, RC_WF_CASE_HD_WL, RF_WF_SERVICE_WL
Navigation	<ul style="list-style-type: none"> • Worklist, Open Worklist, Use, My Worklist • Worklist, Open Worklist, Use, Notification Worklist • Worklist, Open Worklist, Use, Service Order Worklist • Worklist, Open Worklist, Use, HelpDesk Worklist

	<ul style="list-style-type: none"> • Worklist, Open Worklist, Use, Case Worklist View
Access Requirements	None

Worklist
Teri Thomas

Mark Worked
 Reassign

View All
 Notification
 Support
 HelpDesk
 Service Orders

View All

Sort By [Advanced Sort](#)

Find | View All First 1-21 of 21 Last

Link	From	Date/Time	Notification Priority
<input type="checkbox"/> Case 120	Teri Thomas	05/17/2001 11:28:21AM	Medium
<input type="checkbox"/> Case 340	Teri Thomas	05/17/2001 6:04:39PM	Medium
<input type="checkbox"/> Case 302	Teri Thomas	05/17/2001 12:34:11PM	
<input type="checkbox"/> Case 303	Teri Thomas	05/17/2001 1:36:13PM	
<input type="checkbox"/> Case 304	Teri Thomas	05/17/2001 1:46:46PM	
<input type="checkbox"/> Case 305	Teri Thomas	05/17/2001 1:48:02PM	
<input type="checkbox"/> Case 317	Teri Thomas	05/17/2001 2:52:20PM	
<input type="checkbox"/> Case 348	Teri Thomas	05/17/2001 6:35:55PM	
<input type="checkbox"/> Case 357	Teri Thomas	05/18/2001 2:25:57PM	
<input type="checkbox"/> Case 358	Teri Thomas	05/18/2001 2:32:26PM	
<input type="checkbox"/> Case 289	David Perry	05/16/2001 4:12:06PM	
<input type="checkbox"/> Case 292	David Perry	05/16/2001 4:18:51PM	
<input type="checkbox"/> Case 296	Teri Thomas	05/16/2001 5:12:19PM	
<input type="checkbox"/> SO# 0000000047	Teri Thomas	05/16/2001 3:31:23PM	Medium
<input type="checkbox"/> SO# 0000000047	Teri Thomas	05/16/2001 3:31:23PM	

Worklist page

The system displays your username to identify the worklist as yours.

Mark Worked

Enables you to remove an item from your worklist without actually accessing the target page.

Reassign

Enables you to reassign the item to another user and remove the item from your list. Reassigned items appear in the worklist of the recipient of the item.

Sort By

Select *Action Request*, *Description*, or *Priority* from the drop-down list box.

Advanced Sort

Click this link to display the Sort page where you can sort your list using sophisticated criteria.

View All

Displays all items in your worklist.

Notification

Displays all notifications in your worklist.

Support

Displays all worklist items related to PeopleSoft CRM Support.

HelpDesk

Displays all worklist items related to PeopleSoft CRM HelpDesk.

Service Orders

Displays all service order items in your worklist

Case Notification

Displays all case notifications in your worklist.

Link

Click a link in this column to display the underlying application page that is related to the item.



If there is a message attached to the notification, the mail icon appears next to the link. When you click the link, the system launches the Receive page; from there you can click the Linked Component link to view the actual application target page.

From

The name of the person who sent the item.

Date/Time

The date and time that the item was sent.

Notification Priority

The relative importance of the message. Valid values are *High*, *Medium*, or *Low*.

Addressing Dialog Page

Usage	Use the Addressing Dialog page to reassign a worklist item to someone else.
Object Name	RB_ADDRESSING
Navigation	Click the Reassign button on the Worklist page.
Access Requirements	None

Addressing Dialog page

Person ID

The person ID that you are reassigning the item to.

Comment

Freeform text field that provides information about the reassignment.

Sort Page

Usage	Use the Sort page to change the order that items appear in your worklist.
Object Name	AM_SORT_FIELDS_SBP
Navigation	Click the Advanced Sort link on the Worklist page.
Access Requirements	None

Sort

Select Fields to Sort by

Sort by ☒ Ascending ☐ Descending

Then by ☒ Ascending ☐ Descending

Then by ☒ Ascending ☐ Descending

Then by ☒ Ascending ☐ Descending

Then by ☒ Ascending ☐ Descending

Then by ☒ Ascending ☐ Descending

Sort page

In the **Select Fields to Sort by** group box, select the values to sort your worklist.

Sort by The first of the sort criteria. Valid values are ***Date/Time***, ***From***, ***Priority***, and ***URL***.

Then by The subsequent sort criteria values.

For each of the criteria, you can sort in **Ascending** or **Descending** order by selecting the appropriate option.

Group Worklist Page

Usage	Use the Group Worklist page to manage work items that are assigned to a group of users.
Object Name	RB_WF_WL_OPEN
Navigation	Worklist, Open Worklist, Use, Group Worklist
Access Requirements	None

Worklist
westernworklist

Mark Worked
 Reassign

View All Sort By [Advanced Sort](#)

View All First 1-4 of 4 Last

Link	From	Date/Time	Notification Priority
<input type="checkbox"/> Case 3	Teresa Pine	05/22/2001 2:31:57PM	Medium
<input type="checkbox"/> SO# 0000000049	Teresa Pine	05/16/2001 4:51:47PM	
<input type="checkbox"/> SO# 0000000050	Teresa Pine	05/16/2001 5:16:04PM	
<input type="checkbox"/> SO# 0000000050	Teresa Pine	05/16/2001 5:16:05PM	

Group Worklist page

Group worklists are functionally the same as individual worklists.

For more information about the fields and the use of this page, see [Worklist Page](#).

Understanding Notifications

Notifications enable you to send a worklist item manually from within an application page. Use notifications to send action requests to an individual's email inbox or worklist immediately without having to wait for a business process to trigger it. The notification contains the action request, a message that describes the purpose of the notification, and a link to any component that is related to the notification. In PeopleSoft CRM, you can send notifications through the pages for FieldService, Sales, Interaction Management, Support, and HelpDesk.

To send worklist notifications to individual email accounts, select Email in the Send group box on the Send Notification page. Email sent to individuals contains the pertinent notification information including the priority, the action request, a link to the component, and message text.

To send a notification:

1. Open the Send Notification page from your application or by selecting **Worklist, Open Worklist, Use, Send Notification**.
2. Select the delivery method for the notification—**Email, Worklist**, or both.
3. Select the **Priority** for the message.
4. Select the **Action** for the notification.
5. Enter recipient information by clicking the **Address Lookup** button.

You can also send the notification to interested parties, to the people assigned to the item, or to other individuals.

6. Enter the **Message** that you want to send with the notification.
7. Select whether to send the notification immediately or at a future time that you specify.
8. Click Send Notification.

The system displays a message informing you that the message has been sent. You can send a new notification by clicking the **Compose New Request** button.

Send Notification Page

Usage	Use the Send Notification page to send an action item to a worklist or email address.
Object Name	RB_WF_MSG_SEND, RC_ADHOC_EMAIL, RA_ADHOC_EMAIL, RSF_LEAD_WORKLIST, RF_SO_ADHOC
Navigation	<ul style="list-style-type: none"> • From PeopleSoft CRM FieldService, use the Service Order and My Service Order page. • From PeopleSoft CRM HelpDesk and Support, use the Case page. • From PeopleSoft CRM Sales, use the Sales Lead Details page or the Opportunity Detail page. • From PeopleSoft CRM Marketing, use the Campaign Detail - Notes Summary page, the Manage Content - Notes Summary page, the List Detail - Notes Summary page, or the Campaign Offers - Notes Summary page.
Access Requirements	You must be viewing an application page that uses notifications.

Send Notification

Send
☐ Email
☐ Worklist

Priority
☐ High
☒ Medium
☐ Low

Options
☐ Send URL

From: Dhino Karan

Action: Address Lookup...

To:

☐ Send To Interested Parties ☐ Send To Assigned

CC:

☐ CC To Interested Parties ☐ CC To Assigned

Subject:

Message:

☒ Send Now
☐ Send Later Date: Time: (example: 3:25 PM or 15:25)

Send Notification

Send Notification page

The system displays your name in the **From** field.

Send

Email

Select the check box if you want to send this notification as an email message.

Worklist

Select the check box if you want to send this notification to a worklist.

Priority

High

The highest priority for the notification.

Medium

The default priority for the notification.

Low

The lowest priority for the notification.

Options

Send URL

Select the check box to send a URL to the target page in the text of the email.

Address

Use the address region of the page to specify recipients and actions, create the message, and select the address for the recipients.

Action

Specifies the action that you want the recipient to take.

Address Lookup	Enables you to access the Addressing page, where you can select an address for the notification.
	Note. Group worklist names do not appear on this lookup page. You must enter the name of the group worklist in the To field.
To	Specifies the recipient of the notification.
Send To Interested Parties	Sends the notification to all the interested parties.
Send To Assigned	Sends the notification to the assigned individual.
CC (carbon copy)	Sends a copy of the notification to the individuals that you specify in this field.
CC To Interested Parties (carbon copy to interested parties)	Sends a copy of the notification to all the interested parties.
CC To Assigned (carbon copy to assigned)	Sends a copy of the notification to the assigned individual.
Subject	The subject of the notification.
Message	The message that you are sending with the notification.

Send Options

You can select a date and time that you want to send the notification, or you can send it immediately. To send yourself a reminder, address the notification to yourself and select a time in the future to send it. The Set Reminder button in the Case component automatically sets default values for a future date and time that you can override if you choose to.

Send Now	This option sends the notification as soon as you click the Send Notification button.
Send Later	This option enables you to send the notification at a later date and time.
Date	The date that you want to send the notification.
Time	The time that you want to send the notification.
Send Notification	Sends the notification or queues it if you've chosen to send it at a later date.

Addressing Page







Usage	Use the Addressing page to search for an email address for the notification.
Object Name	RB_ADDRESSING
Navigation	Click the Address Lookup button on the Send Notification page.
Access Requirements	None

Addressing

Find an Address

Name:

Search Results View All First 1-6 of 6 Last

Selected	Person ID	Name
<input checked="" type="checkbox"/>	3015	Jackson, Sam 
<input type="checkbox"/>	633	Jackson, Sam E 
<input type="checkbox"/>	3011	Jackson, Samuel 
<input type="checkbox"/>	627	Presley, Sam N 
<input type="checkbox"/>	769	Rabbitt, Sam Pacific 
<input type="checkbox"/>	619	Samuels, Jackson T 

Add to Send List

To:

Add to CC List

CC:

Addressing page

Find an Address

Name

Enter the name that you are searching for in last name, first name order. You must enter at least a partial value in this field to perform a search. For example, enter *J*, to find all last names that begin with *J*. You may use the percent sign as a wildcard to help with your name search. For example, enter *%,Joe* to find everyone with the first name *Joe*.

Search

Click this button to display search results in the **Search Results** group box. Search results include the **Person ID** and **Name** for each person found.

Selected

Select the check box to select a person as a recipient.

Person ID

The identifier for the person.

Name



Click this button to display the Personal Info (personal information) page and view the information for this person.

Add to Send List



Click to transfer the selected people to the list of recipients.

To

The list of people who will receive the notification.

Add to CC List



Click to transfer the selected people to the list of copied recipients.

CC (carbon copy) The list of people who will be copied with the notification.

Click **OK** to add the addresses to the notification.

Receive Page

Usage	Use the Receive page to view notifications and their linked components.
Object Name	RB_WF_MSG_RECV
Navigation	Worklist, Open Worklist, Use, Receive Notification
Prerequisites	You must have received a notification with text and a linked component.
Access Requirements	You must have access to the group or individual worklist that received the notification.

Receive

From: Teresa Pine

Datetime: 04/12/2001 4:22:39.000000PM **Priority:** High

Action Request: Send Email to Customer

To:

CC:

Subject: Please send an email to Boston
[Linked Component](#)

Message Text: This is a very important message.

Receive page

The system displays the information from the notification in read-only format.

From	The person who sent the notification.
Datetime	The date and time that the notification was sent.
Priority	The relative importance of the message. Valid values are Low , Medium , and High .
Action Request	The text of the request.
To	The recipients of the notification.
CC (carbon copy)	The recipients of copies of the notification.
Subject	The title of the notification.
Linked Component	The link to the underlying component that is related to the notification.

Message Text

The text message associated with the notification.

Note. If you are sending a notification that has a linked component, the recipient of the notification must have permission to access that component. For example, if you are sending a notification regarding a service order, the recipients must have security to work with service orders or they will not be able to view the linked component.

CHAPTER 4

Tracking Time Spent on Service Orders and Cases

In PeopleSoft CRM, you can log the actual labor time associated with performing the work for each service order line or case using the Manage Time component.

Understanding Time Records

For each case and for each line on a service order, the system automatically creates a time log that can be updated using the Manage Time page. Time logs created from cases are blank; time logs created from a service order are populated with the name of the lead technician on the service order. Information entered on the Manage Time page is stored in the PeopleSoft database for informational purposes only. Although the system offers no time reporting, costing, or billing capabilities as packaged, you can design your own reports and processes to leverage the time data captured for each case or service order line.

Manage Time Page

Usage	Use the Manage Time page to track the actual time required to complete a service order line or a case.
Object Name	RF_TIME
Navigation	<ul style="list-style-type: none">• Manage FieldService, Maintain Service Orders, Use, Manage Time• Click the Manage Time link on the Service Order page.• Click the Time link on the My Service Order page.• Manage Call Center, Manage Cases, Use, Manage Time• Click the Track Time button on the toolbar of the Support component or HelpDesk component.
Prerequisites	To log time for a service order line, the service order line must be created using the Service Order page or the My Service Order page in PeopleSoft CRM FieldService. To log time for a case, the case must be created using the Case component in PeopleSoft CRM Support or the HelpDesk component in PeopleSoft CRM HelpDesk. The system automatically creates a time log for each case and each line of a service order.

	Note. The fields on the Manage Time page will be unavailable for entry if the associated service line requires approval and has not been approved.
	For more information about the Service Order page, see Creating and Managing Service Orders in the <i>PeopleSoft CRM FieldService PeopleBook</i> . For more information about the My Service Order page, see Working With My Service Orders in the <i>PeopleSoft CRM FieldService PeopleBook</i> . For more information about the Case component in PeopleSoft CRM Support or PeopleSoft CRM HelpDesk, see Managing Cases in the <i>PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook</i> .
Access Requirements	When accessing the page from the Maintain Service Orders menu, enter a business unit, service order ID, and service order line number. When accessing the page from the Manage Cases menu, enter a business unit and case ID. You cannot add new time log records manually. You can only update the time logs created by the system for each case and each line on a service order.

Manage Time

Unit: US200 Service Order ID: 0000000006 Line: 1

Time Log View All First 1 of 1 Last

Name:

Start Date: Start Time:

End Date: End Time:

Total: Hours

☐ Billable

Comments:

Go to: [Service Order](#)

Manage Time page

When the Manage Time page is accessed for a service order line, the system displays the business **Unit**, **Service Order ID**, and service order **Line** number. When the Manage Time page is accessed for a case, the system displays the business **Unit** and **Case Number**.

Time Log

The **Time Log** scroll area lists the time records associated with each line of the service order or the case. Each entry represents a continuous block of time that one person spent working on a case or a service order. Add additional entries to represent work that stops and starts or that is performed by multiple workers.

Name

The name of the worker who spent the time performing the work on the service order line or on the case. For a service order time record, the system populates this field with the name of the lead technician. For a case time record, the system populates this field with the name of the agent assigned to the case.

Start Date	The date the work period that you are tracking begins. This value is manually entered for both case and service order time records.
Start Time	The time the work period that you are tracking begins. This value is manually entered for both case and service order time records.
End Date	The date the work period that you are tracking ends. This value is manually entered for both case and service order time records.
End Time	The time the work period that you are tracking ends. This value is manually entered for both case and service order time records.
Total	The total time in hours recorded for the case or service activity in this group of entries. This value must be manually entered.
Billable	Indicates whether the labor time can be billed to the customer.
Comments	Any notes recorded for the time log entry.

The **Go To** link provides navigation back to the associated service order or case. Click the **Service Order** link to return to the associated service order. Click the **Case** link to return to the associated case. There is no **Go To** link if you navigated to the page from **Manage Call Center, Manage Cases, Use, Manage Time**.

CHAPTER 5

Managing Solutions

Solutions are resolutions to problems. A well-defined set of predefined solutions for common problems helps your organization resolve customers' problems quickly and efficiently. This chapter describes how to create and maintain that set of solutions.

Overview of Solutions

Solutions can apply to problems tracked through service orders or to problems tracked through call center cases.

Using Solutions

Field service technicians and call center agents use solutions differently.

PeopleSoft CRM FieldService does not track which solutions are used for specific service orders. Field service technicians use solutions only by viewing them.

PeopleSoft call center applications (PeopleSoft CRM Support and PeopleSoft CRM HelpDesk) track not only the final solution to a case—the one that resolved the customer's problem—but also failed solutions and other solutions considered. By tracking solution usage, your organization captures valuable information about your solution set. You track solution usage by associating solutions to cases and using the solution Status field to indicate whether the solution solved the case.

Both field service technicians and call center agents can search for solutions using Solution Advisor. Technicians access Solution Advisor by clicking the Troubleshooting link on the My Service Orders page. Agents access Solution Advisor by clicking the Solution Advisor link on the Case page. The Solution Advisor page associated with cases provides additional functionality beyond just searching for solutions, including the ability to associate a solution with the case from which the search originated.

For more information about using Solution Advisor in PeopleSoft CRM FieldService, see Working With My Service Orders in the *PeopleSoft CRM FieldService PeopleBook*. **For more information** about using Solution Advisor in PeopleSoft CRM call center applications, see Using Solution Advisor in *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook*.

Call center agents have additional ways of finding solutions from the Case page. They can prompt for frequently used solutions by product, and they can prompt for a specific solution ID. All of these methods provide the agent with a mechanism for associating solutions to the originating case.

Scoring Solutions

When you use Solution Advisor to search for solutions, the search results are ranked by relevance. Relevance scores range from 1 to 100, with 100 representing the highest relevance. A solution's relevance score is calculated based on the following criteria:

- How well the search criteria matches the solution.

The search index template for solutions determines which fields are searched to determine if there is a match.

- How often the solution has been used.

Because PeopleSoft CRM FieldService does not track solution usage, this criteria is not relevant when you access Solution Advisor from a service order, only when you access Solution Advisor from a case.

- Optionally, the age of the solution.

A system-wide setting on the Solution Management Setup page determines whether Solution Advisor considers the age of the solution.

For more information about scoring solutions, see the Managing PeopleSoft CRM Search chapter.

Managing Solutions

Over time, even a well-managed solution set can end up with similar or duplicate solutions. PeopleSoft provides mechanisms to deactivate solutions and to help you find and merge similar solutions.

Deactivate a solution by giving it an expiration date. Once you enter a date (even if it's a future date), the solution is not available to cases or service orders. The exception is when the solution has already been associated with a case. In this situation, you can still view the solution when you click the solution summary on the Case page.

Expired solutions can be associated with a replacement solution. This is especially useful when you have a solution that explains a problem or suggests a temporary fix without actually resolving the problem. When a true solution for the problem becomes available, you can give the temporary solution an expiration date and cross-reference the new solution.

The ability to give a solution an expiration date is particularly important in call center applications. This is because there may be cases associated with a solution, and deleting or modifying the original solution compromises your data integrity.

When you merge solutions, you create a master solution that supercedes one or more similar solutions. The superceded solutions all expire, and they cross-reference the new master solution.

Managing Call Center Solutions

There are three aspects of solution management that are specific to call center applications (PeopleSoft CRM Support and PeopleSoft CRM HelpDesk):

- Tracking solution usage.
- Setting defaults to control the type and number of objects returned by Solution Advisor and the Frequently Used Solution page.
- Creating standard solutions out of independent text solutions.

Tracking Solution Usage

PeopleSoft call center applications enable you to track the application of a solution to cases. The system tracks three different numbers for each solution.

Number	Description
Solved count	<p>Indicates how many cases the solution has resolved.</p> <p>This number is informational only; Solution Advisor displays this number to help you determine a solution's potential.</p> <p>This number increases by one every time that you set a solution status to <i>Successful Resolution</i>. The number decreases by one if you change the status of a solution formerly designated as successful.</p>
Usage count	<p>Indicates how many cases the solution has been associated with—regardless of whether the solution was successful.</p> <p>This number is a minor factor in determining the relevance score when you use Solution Advisor to search for solutions.</p> <p>This number increases by one every time that you associate the solution with a case. The number decreases by one if you change the solution status to <i>Withdrawn</i>.</p>
Usage count by product	<p>Indicates how many times the solution resolved a case for the products that are associated with the solution (on the Related Products page). If the solution is used to resolve a case for another product, that usage is not counted.</p> <p>This number is used to determine which solutions appear on the Frequently Used Solutions page.</p>

The Update Solution Usage Counts process (which you run from the Solution Usage Run Control page) updates all three of these numbers.

- It is the only mechanism for updating the usage count by product.
- It enables you to set the solved count based on a particular date range.

For example, you may want your solved counts to reflect usage over the last six months.

- It is a backup mechanism for updating the solved count and the usage count.

The system normally maintains these counts by increasing and decreasing the values as you work with solutions. But if you have any reason to question your data integrity, or if you've imported data into your CRM application using a batch process, the Update Solution Usage Counts process reestablishes accurate counts based on your case data.

Configuring Search Settings

Users enter some search parameters when they use Solution Advisor. Both field service technicians and call center agents enter search text. Call center agents can additionally select which types of objects to search and whether to use a natural language search or a keyword search.

Other search settings are set at the system level and apply to both the field service and call center applications. Use the Solution Management Setup page to configure system-wide settings that:

- Restrict the number of solutions displayed in Solution Advisor results.
- Determine whether solution age is a factor in the relevance score.

You can also restrict the number of solutions displayed on the Frequently Used Solutions page—the page that you access from a case to see frequently used solutions by product.

The number of solutions you display in the Solution Advisor results grid or in the Frequently Used Solutions page can impact performance: a smaller number of solutions enables faster performance.

Creating Standard Solutions Out of Independent Text Solutions

Standard solutions are predefined, officially sanctioned descriptions of how to solve a problem. You can also resolve problems with *independent text solutions* if your business unit allows you to do so. These aren't officially sanctioned solutions, they're descriptions of how a single case was solved.

Independent text solutions can be reused in other cases, but they can be accessed only through Solution Advisor, not through the Frequently Used Solutions page or the Solution ID page.

The system tracks usage counts for independent text solutions. Each time an agent uses an independent text solution found by Solution Advisor, the usage count for that independent text solution is increased by one. The Update Usage Counts process does not reset the usage count for independent text solutions.

By tracking independent text solution usage, the system enables you to search for ones that have been reused and therefore may be appropriate to turn into officially sanctioned solutions.

PeopleSoft provides a mechanism for reviewing independent text solutions and converting them into standard solutions: the Make Solution From Resolution Page. Use this page to search for independent text solutions that have been used a specified number of times and to convert selected solutions into standard solutions.

Creating Solutions

Define solutions using the four pages of the solution component. The Solution Summary page, Related Products page, and Attachments page are relevant to both PeopleSoft CRM FieldService and to the two call center applications. The Related Cases page is only relevant to the two call center applications.

PeopleSoft CRM call center applications provide an inquiry page that agents can use to review basic solution information.

Solution Summary Page

Usage	Use the Solution Summary page to create and deactivate solutions. As you create solutions, remember that the information you enter is the basis for Solution Advisor searching.
Object Name	RC_SOLUTION
Navigation	Manage Call Center, Manage Solutions, Use, Solution Define Business Rules, Maintain Solution, Use, Solution
Access Requirements	Enter a solution ID.

Solution Summary		Related Products	Attachments	Related Cases
SetID:	CRM01	Solution ID:	5	
Type:	Standard	Visibility:	All	
Summary:	How to get rid of the Yellow and Brown discoloration in my Dishwasher?			
Symptoms:	Dishes and the interior of the dishwasher are turning yellow and brown?			
Details:	There is probably too much Iron or Manganese in the water. To get rid of the discoloration, run a quarter to half a cup of citric acid crystals (available at drug stores) through a complete washing cycle without dishes.			
Expiration details				
Expiration Date:	04/01/2001	Superceded by:	1	
Reason:	Duplicate Solution			
Date Added:	04/03/2001 9:12AM	Added By:		
Last Modified:	04/03/2001 9:12AM PDT	MG634		

Solution Summary page

Solution Information

SetID The setID determines which business units have access to this solution.

Solution ID The unique identifier for this solution.

Type Select one of the following values:

Standard: A solution that resolves a problem.

Workaround: A solution that explains the problem or suggests a temporary fix for the problem without actually resolving the problem.

Visibility Select **All** to allow all users to access the solution. Select **Internal** to prevent self-service users from accessing the solution.

Summary Enter a short description of the solution. When you view solutions associated with a case or solutions found by Solution Advisor, the summary text identifies the solution.

Symptoms Enter a description of the problem that the solution addresses.

Details Enter an explanation of how to solve the problem.

Expiration Details

Expiration Date The date that the solution is unavailable. The value is informational only; the presence of any date (including a future date) in this field deactivates the solution. When you merge solutions using the Merge Similar Solutions page, the system automatically enters this information.

Superceded by	If the solution is expired, this is the solution ID of the replacement solution. When you merge solutions using the Merge Similar Solutions page, the system automatically enters this information.
Reason	Enter an explanation of the reason that the solution is expired. You must enter this information manually; the system does not enter a reason when it merges similar solutions.

Solution Tracking Information

Date Added	The date that the solution was created.
Added By	The user who added the solution.
Last Modified	The date that the solution was last modified and the user ID of the person who modified it.

Related Products Page

Usage	Use the Related Products page to identify products to which a solution applies.
Object Name	RC_SOLN_PRODUCT
Navigation	Manage Call Center, Manage Solutions, Use, Solution Define Business Rules, Maintain Solution, Use, Solution
Prerequisites	Set up product definitions.
Access Requirements	Enter a solution ID.

Solution Summary **Related Products** **Attachments** **Related Cases**

SetID: CRM01 **Solution ID:** 5

Summary: How to get rid of the Yellow and Brown discoloration in my Dishwasher?

Products		View All	First	1-4 of 4	Last
Product ID	Product				
SR1013	24 in. Ultrawash Dishwasher 3				
SR1014	24 in. Ultrawash Dishwasher 3				
SR1015	24 in. Dishwasher 5 Cycles (St				
SR1016	24 in. Dishwasher 5 Cycles (Al				

Related Products page

The **SetID**, **SolutionID**, and **Summary** identify the current solution.

Product ID	The unique identifier of a product that exhibits the symptoms described by this solution. Only products with the same setID as the solution can be associated with the solution.
-------------------	--

Product

The product description as it appears on the Product Definition - Definition Page.

Attachments Page

Usage	Use the Attachments page to add attachments to the solution. For example, you can add instructional documents or software patches to the solution. Note that Solution Advisor does not search the content contained in solution attachments.
Object Name	RC_SOLN_ATTACH
Navigation	Manage Call Center, Manage Solutions, Use, Solution Define Business Rules, Maintain Solution, Use, Solution
Access Requirements	Enter a solution ID

Solution Summary Related Products **Attachments** Related Cases

SetID: CRM01 **Solution ID:** 2

Summary: Cleaning dishes in the Dishwasher.

Attachments View All First 1 of 1 Last

File Name	File Description	Added By	Date Added
dishwasher.pdf	diagram of proper loading		

Delete

Attach a file

Attachments page

The **SetID**, **SolutionID**, and **Summary** identify the current solution.

File Name

The name of the attached file. The system automatically enters the file name when you create the attachment. The file name is also a link to the file; click the link to view the attachment in a browser window.

File Description

Descriptive information about the attached file. Enter a description if the file name is not descriptive enough.

Added By

The person who added the attachment to the solution.

Date Added

The date that the attachment was added to the solution.

Delete

Click this button to disassociate the attachment from the solution.

Attach a File

Click this button to add a new attachment to the solution.

For more information about adding attachments to objects, see Adding Notes and Attachments in the "Using PeopleSoft CRM Common Elements" chapter.

Related Cases Page

Usage	Use the Related Cases page to review cases that this solution is associated with—regardless of whether the solution resolved the case. This page is relevant only to users of PeopleSoft CRM Support and PeopleSoft CRM HelpDesk. Because the data is maintained by the system, this page is not editable.
Object Name	RC_SOLN_RLTD_CASE
Navigation	Manage Call Center, Manage Solutions, Use, Solution Define Business Rules, Maintain Solution, Use, Solution
Access Requirements	Enter a solution ID

Solution Summary Related Products Attachments Related Cases

SetID: CRM01 **Solution ID:** 5

Summary: How to get rid of the Yellow and Brown discoloration in my Dishwasher?

Related Cases		
Case	Problem Summary	Status
126	Dishwasher has yellow grime and the pipes are clogged	Waiting On Customer

Solution - Related Cases page

The **SetID**, **SolutionID**, and **Summary** identify the current solution.

Case The case number of a case that is associated with this solution.

Problem Summary The case summary as it appears on the Case page.

Status The status of the solution in the case.

For more information about solution statuses, see Resolving Cases in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook*.

Solution Inquiry Page

Usage	Use the Solution inquiry page to review basic information about a solution.
Object Name	RC_SOLUTION_INQ
Navigation	Manage Call Center, Manage Cases, Inquire, Solution
Prerequisites	None

Access Requirements	Enter a Solution ID.
---------------------	----------------------

Solution

SetID: CRM01 **Solution ID:** 1
Type: Standard **Visibility:** All
Summary: Removing Yellow and Brown discoloration from the Dishwasher?
Symptoms: Dishes and the interior of the dishwasher are turning yellow and brown?
Details: There is probably too much Iron or Manganese in the water. To get rid of the discoloration, run a quarter to half a cup of citric acid crystals (available at drug stores) through a complete washing cycle without dishes.
Datetime Added: 04/01/2001 1:26PM **Added By:** STEWART,TOM
Last Modified: 04/01/2001 1:26PM PDT DVP1
[Return to Search](#) [Next in List](#) [Previous in List](#)

Solution inquiry page

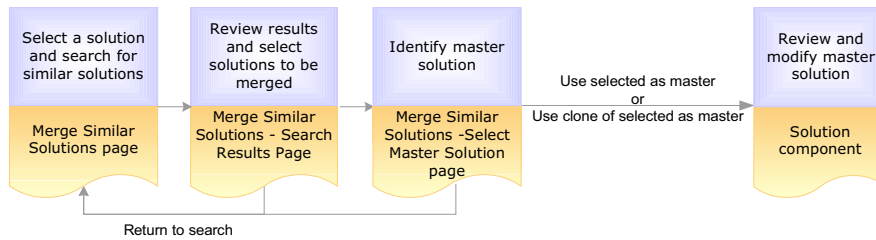
The fields on this page all correspond to fields on the Solution Summary page. **For more information** about these fields, see Solution Summary Page in this chapter.

Merging Similar Solutions

Merging solutions is a multi-step process involving a series of pages:

- Select a starting solution and search for similar solutions using the Merge Similar Solutions page.
- Review the search results and select the solutions to be merged using the Merge Similar Solutions - Search Results page.
- Review the selected solutions and select one to be the master solution using the Merge Similar Solutions – Select Master Solution page.
- Perform the merge. You can use the selected solution as the master solution, or you can clone that solution to create a new master solution. When the merge is complete, the system displays the new master solution so that you can review it and make any necessary changes in the Solution component.

The following diagram illustrates the process and shows which pages you use for each step.



Merging similar solutions

Merge Similar Solutions Page

Usage	Use the Merge Similar Solutions page to search for solutions similar to a solution that you identify. This is the first step in the process of merging solutions.
Object Name	RC_FIND_SIMLR_SOLN
Navigation	Manage Call Center, Manage Solutions, Use, Merge Similar Solutions Define Business Rules, Maintain Solution, Use, Merge Similar Solutions
Access Requirements	Enter the setID for the base solution—the solution uses as the basis for the search for similar solutions.

The screenshot shows the 'Merge Similar Solutions' page. It includes a 'SetID' field with the value 'CRM01' and a dropdown menu showing 'Appliance'. Below this is a 'Solution ID' field with a search icon. There are two checked checkboxes: 'Include Solution Description' and 'Include Symptoms'. At the bottom is a yellow 'Search Similar Solutions' button.

Merge Similar Solutions page

SetID

The setID of the solution that you identify in the **Solution ID** field.

Solution ID

Identify a solution so that you can search for similar solutions.

Include Solution Description

Select this check box if you want to search for similar solutions based on the description of the solution that you've identified. The system searches all the fields in the search collection.

Include Symptoms

Select this check box if you want to search for similar solutions based on the symptoms you entered in the Solution Summary page for the solution that you've identified. The system searches all the fields in the search collection.

Search Similar Solutions

Click this button to initiate the search for similar solutions. After you click the button, the system displays the results on the Merge Similar Solutions - Search Results page.

For more information about setting up your search collection and selecting fields to search, see the **Managing PeopleSoft CRM Search** chapter.

Merge Similar Solutions - Search Results Page

Usage	Use the Merge Similar Solutions - Search Results page to review a list of solutions similar to a solution that you identified and to select solutions to merge.
Object Name	RC_FIND_SSOLN_RSLT
Navigation	Click the Search Similar Solutions button on the Merge Similar Solutions page.

Merge Similar Solutions

Search Results

SetID: CRM01Solution ID: 1

Select	Score	Solution ID	Summary	Added By	Date Added
<input type="checkbox"/>	77%	1	Removing Yellow and Brown discoloration from the Dishwasher?	STEWART,TOM	04/01/2001 1:26PM
<input type="checkbox"/>	77%	5	How to get rid of the Yellow and Brown discoloration in my Dishwasher?		04/03/2001 9:12AM
<input type="checkbox"/>	20%	2	Cleaning dishes in the Dishwasher.	STEWART,TOM	04/01/2001 1:27PM
<input type="checkbox"/>	20%	6	How to get the dishes clean in the Dishwasher.		04/03/2001 9:12AM
<input type="checkbox"/>	18%	10	How to fix dishwasher leaks.		04/03/2001 9:12AM
<input type="checkbox"/>	18%	7	How to avoid permanent film on Glasses when washes dishes in the Dishwasher		04/03/2001 9:12AM
<input type="checkbox"/>	13%	8	How to make dishwasher more energy efficient.		04/03/2001 9:12AM
<input type="checkbox"/>	9%	11	Steps to fix if the Dishwasher Cycle is too long.		04/03/2001 9:12AM
<input type="checkbox"/>	8%	12	Standing water in the bottom of the dishwasher after a wash.		04/03/2001 9:12AM
<input type="checkbox"/>	8%	9	How to start a Dishwasher.		04/03/2001 9:12AM

☒ Select All☐ Clear All

Merge SolutionsReturn To Search

Merge Similar Solutions - Search Results page**Select**

Select this check box to identify the solutions that you want to merge.

Score

The relevance score calculated by Verity indicates how closely the solution matches the search criteria.

Solution ID

The unique identifier for a solution.

Summary	The solution description as it appears on the Solution Summary page.
Added By	The user who added the solution.
Date Added	The date that the solution was created.
Select All	Click this link to select all solutions.
Clear All	Click this link to clear the Select check box for all solutions.
Merge Solution	After you've selected the solutions to be merged, click this button to continue the merging process. When you click this button, the system displays the selected solutions on the Merge Similar Solutions - Select Master Solution page, where you can select one solution as the master solution and complete the merge.
Return to Search	Click this link to return to the Merge Similar Solutions page.

Merge Similar Solutions - Select Master Solution Page

Usage	Use the Merge Similar Solutions - Select Master Solution page to review the list of solutions to be merged, to select one solution to use as the master solution or as the basis of the master solution, and to complete the merge. When you merge solutions, all solutions other than the new master solution (either the selected solution or its clone) expire as of the date that you perform the merge. Each of the expired solutions identifies the new master as the superceding solution—including the selected solution if you cloned it to create the new master.
Object Name	RC_FND_SELECTMASTR
Navigation	Click the Merge Solutions button on the Merge Similar Solutions - Search Results Page.
Prerequisites	Select at least two solutions on the Merge Similar Solutions - Search Results Page.

Merge Similar Solutions

Select Master Solution

View All

First

1-2 of 2

Last

Select	Score	Solution ID	Summary	Added By	Date Added
<input type="checkbox"/>	77%	1	Removing Yellow and Brown discoloration from the Dishwasher?		
<input type="checkbox"/>	77%	5	How to get rid of the Yellow and Brown discoloration in my Dishwasher?		

Use Selected As Master

Create New Solution

[Return To Search](#)

Merge Similar Solutions - Select Master Solution page

The column headings on this page are identical to those on the Merge Similar Solutions - Search Results page.

Select one of the solutions listed before clicking one of the following page elements.

Use Selected as Master

Click this button to merge the solutions using the selected solution as the master solution. Attachments and products associated with the expired solutions are added to the master solution.

Create New Solution

Click this button to clone the selected solution and to merge the solutions using the newly created solution as the master solution. Attachments and products associated with the expired solutions are added to the new master solution.

Return to Search

Click this link to return to the Merge Similar Solutions page without merging the solutions.

Managing Call Center Solutions

This section documents solution management pages that are specific to call center applications (PeopleSoft CRM Support and PeopleSoft CRM HelpDesk. These pages are not relevant to solutions that are used only by PeopleSoft CRM FieldService.

Solution Management Default Setup Page

Usage	Use the Solution Management Defaults page to configure rules for searching and accessing solutions from PeopleSoft CRM Support and PeopleSoft CRM HelpDesk.
Object Name	RC_SOLN_MGMT_SETUP
Navigation	Manage Call Center, Manage Solutions, Setup, Solution Management
Prerequisites	None
Access Requirements	None

Solution Management Default Setup page

Solution Advisor**Rows Returned**

Select this option to enter a maximum number of search results to be displayed by Solution Advisor.

Score

Select this option to enter a minimum score that a solution must have in order to be included in the Solution Advisor results grid.

Alternate Scoring

When this check box is selected, Solution Advisor calculates a solution's relevance score based on the age of the solution as well as on the other search criteria that you specify. Clear this check box if you want Solution Advisor to calculate relevance scores based only on the search text and the usage count.

Frequently Used Solutions**Frequently Used Threshold**

Select the number of solutions to be displayed on the Frequently Used Solutions page, which displays the solutions used most often to resolve problems for a specific product.

Search Areas

When a call center agent accesses Solution Advisor from a case, the agent can choose which objects to search—that is, the agent chooses *search areas*. The search areas that you select here are also selected by default when the agent initially accesses the Solution Advisor page. You can select any of the following check boxes: **Solution**, **Independent Text Solution**, **Case Indicator**, and **Problem Solving Technique**.

Solution Usage Run Control Page

Usage	Use the Solution Usage Run Control page to run the RC_SOLN_USAG Application Engine process, which updates the solved count, usage count, and usage count by product for all solutions in the database.
-------	--

Object Name	RC_SOLN_RUN_CNTL
Navigation	Manage Call Center, Manage Solutions, Use, Update Solution Counts
Prerequisites	None
Access Requirements	Enter a run control ID.

Solution Usage Run Control

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Affected Dates

☒ All

☐ From Date: To Date:

☐ Update Solution Usage Counts

☐ Update Solution Usage Counts by Product

Solution Usage Run Control page

Affected Dates**All**

Select this option to count every use of the solution.

From Date

Select this option to count solution usage during a particular date range. If you select this option, specify the first date in the date range.

To Date

If you selected **From Date**, enter the last date in the date range.

Processing Options**Update Solution Usage Counts**

Select this check box if you want the process to update usage counts and the solved counts.

Update Solution Usage Counts by Product

Select this check box if you want the process to update solution counts by product.

Run

Click this button to display the Process Scheduler Request page, where you can initiate the process.

For more information about Process Scheduler, see the Working with Processes and Reports chapter in the *Using PeopleSoft Applications*. PeopleBook

Make Solution From Resolution Page

Usage	Use the Make Solution From Resolution page to search for independent text solutions and convert them to standard solutions.
Object Name	RC_CREATE_SOLNITRS
Navigation	Manage Call Center, Manage Solutions, Use, Make Solution From Resolution
Prerequisites	None
Access Requirements	None

Make Solution From Resolution

User: Perry,David L

Usage Count Greater Than:

Independent Text Resolutions Used in Cases View All First 1-3 of 3 Last

Usage Count	Summary	
11	Remove the Grill and clean the grill and pipes.	<input type="button" value="Create Solution"/>
8	Get the Air Cooler serviced	<input type="button" value="Create Solution"/>

Make Solution From Resolution page

Searching for Independent Text Resolutions

User	The user who created the independent text solutions.
Usage Count Greater Than	Specify the minimum number of times that an independent text solution must have been used in order to be considered for a standard solution.
Search	Click this button to search for independent text solutions that have been used at least as many times as you've specified.

Independent Text Resolutions Used in Cases

After you click the **Search** button, a list of independent text solutions that meet the search criteria appears in this grid.

Usage Count	Indicates how many cases the solution has been associated with—regardless of whether the solution was successful.
Summary	The summary of the solution. The summary is also a link. Click the link to view the solution details.

Create Solution

Click this button to create a new solution based on the independent text solution. When you click this button, the Solution page appears so that you can review and modify the information before saving the new solution. The Related Cases page for the newly created solution does not list the cases resolved by the original independent text solution.

Make Solution From Resolution - Resolution Details Page

Usage	Use the Make Solution From Resolution - Resolution Details page to review an independent text solution before converting it to a standard solution.
Object Name	RC_CREATE_SOLNITDT
Navigation	Click the Summary link for an independent text solution on the Make Solution From Resolution page.

Make Solution From Resolution

Resolution Details

Resolution Details View All First 1 of 3 Last

Resolution Summary: Remove the Grill and clean the grill and pipes.

Resolution Details: Remove the Grill and clean the grill and pipes.

[Go To Summary Page](#)

[Create Solution](#)

Make Solution From Resolution - Resolution Details page**Resolution Summary**

A summary of the independent text solution. This is usually derived from the first 50 characters of the full solution details, but you can also update the summary on the Solution Details page that you access by clicking the Details button in the Solutions Considered for this Case grid on the Case page.

Resolution Details

The text of the solution.

Create Solution

Click this button to create a new solution based on the independent text solution. When you click this button, the Solution page appears so that you can review and modify the information before saving the new solution.

The Related Products page of the newly created solution lists the products associated with the cases resolved by the original independent text solution.

Go To Summary Page

Click this link to return to the Make Solution From Resolution page.

CHAPTER 6

Setting General Options

PeopleSoft applications rely on tables to store not only your business transactions, but also the structure and processing rules that drive your system. So before you can begin, you'll need to set up your basic framework using pages in the Define General Options menu.

These pages are built over what we call core tables—tables delivered with and shared among many PeopleSoft applications. You'll set up these tables using online pages, some of which are also shared among the various PeopleSoft applications.

Using Automatic Numbering

The system can automatically generate unique numerical identifiers for many PeopleSoft CRM objects. The system generates unique identifiers by tracking the last number used and by increasing the number by one for each new object.

PeopleSoft CRM handles automatic numbering differently for different objects: some objects derive identifiers from the rules that you specify on the Auto Numbering page, others derive identifiers from the rules that you specify on the Setup Last Numbers page.

Both pages enable you to enter a number that the system increases to create identifiers for each new object. However, there are several differences in how autonumbering is handled for the two classes of objects. The following table summarizes the differences.

<i>Properties of objects that use the Auto Numbering Page</i>	<i>Properties of objects that use the Setup Last Numbers Page</i>
You can include a three-character prefix before the number.	Identifiers are numeric only.
You can determine the maximum length of the number.	The maximum length of the number is dependent on the type of object and varies from twelve to eighteen digits.
Identifiers are unique within a specified setID.	Identifiers are unique across the system.
Autonumbering is optional; you can configure the system so that users can enter identifiers manually.	Autonumbering is required; there is no way for users to enter an identifier manually.

Understanding Autonumbered Objects

You do not select which of the two autonumbering mechanisms to use for particular objects; objects are configured to use one or the other. This section documents which objects use each mechanism.

Objects that Use the Auto Numbering Page

The following objects derive their identifiers from the rules that you establish in the Auto Numbering page.

Number Type	Associated Field	Use
Address ID	CR_ADDRESS_ID	Used to assign a unique ID to an address. Used by Manage Customer and Manager Workforce menu items so that you can define a customer address or a person address.
Agreement PIN (agreement personal identification number)	PERSON_PIN	Personal identification number for a named called or an agreement.
Contact ID	CONTACT_ID	Used to assign a customer contact ID. Used to define a contact in the Maintain Contact menu. A contact ID is also assigned by the system when you associate a contact to a customer.
Customer ID	CUST_ID	Used to assign a unique ID to a customer. Required by Manage Customer and Manage Workforce so that you can define a customer address or a person address.
Installed Product	INST_PROD_ID	Identifier for an installed product for a specific customer.
Manage Expenses	SHEET_ID	Identifier for an expense log associated with a service order.
Material Header ID	MATERIAL_HDR	Identifier for the material associated with a service order line.
Person ID	PERSON_ID	Used to assign a unique ID to a person in the system. Required by Manage Workers and Manage Contacts.

Number Type	Associated Field	Use
Product ID	PRODUCT_ID	Used to assign a unique ID to a product. Required by Define Products and Items.
Returned Material Authorization	RMA_ID	Identifier for an RMA (returned material authorization) associated with a case.
Service	SERVICE_ID	Identifier for Service.
Service Order	SO_ID	Identifier for a service order.
Site Identification Number	SIN	Site identification number for a covered site on an agreement.
Time	TIME_SHEET_ID	Identifier for a time log associated with a service order or case.

Objects that Use the Setup Last Numbers Page

The following objects always derive their identifiers from the Setup Last Numbers page. Because PeopleSoft delivers initial values in the Setup Last Numbers page, you do not have to configure autonumbering for these objects unless you want to decide where to start the autonumbering sequence.

Remember that identifiers are unique across applications. So, for example, PeopleSoft CRM Support cases and PeopleSoft CRM HelpDesk cases never have the same case number.

Object	Where Used
Case	Cases in PeopleSoft CRM Support and PeopleSoft CRM HelpDesk.
Solution	Solutions in PeopleSoft CRM Support, PeopleSoft CRM HelpDesk, and PeopleSoft CRM FieldService.
Solution advisor log file	Solution Advisor log files in PeopleSoft CRM Support, PeopleSoft CRM HelpDesk, and PeopleSoft CRM FieldService.
Business project	Business projects instances in PeopleSoft CRM Support and PeopleSoft CRM HelpDesk.
Branch script instance	Branch script instances in PeopleSoft CRM Support, PeopleSoft CRM HelpDesk, and PeopleSoft CRM Sales.

Auto Numbering Page

Usage	Use the Auto Numbering page to define automatic numbering specifications for PeopleSoft fields.
Object Name	AUTO_NUM_PNL
Navigation	Define Business Rules, Define General Options, Use A-D, Automatic

	Numbering
Access Requirements	Enter a setID and number type.

Auto Numbering

SetID: SHARE SHARE

Number Type: CUST Customer ID

Field Name: CUST_ID Length: 15

Start Seq	Max Length	Description	Last Number Issued	Default?
000	9	bbb	6	<input checked="" type="checkbox"/>

Auto Numbering page

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

Field Name	The field name for which you want to set up automatic numbering.
Length	The field length.
Start Seq (start sequence)	The prefix with which you want to start. The prefix can contain up to three alphanumeric characters.
Max Length (maximum length)	The maximum length you want the number to be.
Description	A description of the numbering sequence that you want to use.
Last Number Issued	The last number issued. Automatic numbering will begin with the next number.
Default?	Select this check box if you want the system to use automatic numbering as a default setting. Otherwise, the system uses automatic numbering only if the number field is blank.

Setup Last Numbers Page

Usage	Use the Setup Last Numbers page to view and reset automatic numbering for cases, solutions, Solution Advisor logs, business projects, and branch script nodes.
Object Name	RC_LAST_NBR_PAGE
Navigation	Define Business Rules, Structure Call Center, Setup, Last Numbers
Access Requirements	None

Setup Last Numbers

View All First 1-5 of 5 Last

	Object Type	Last Number			
1	Business Project	26			
2	Branch Script	486			
3	Case	441			
4	Solution Advisor Log	1			
5	Solution	144			

Setup Last Numbers page

Object Type

The object identifying number that you want to configure. PeopleSoft delivers the system with a row for each object whose numbering is managed in this page: ***Case, Branch Script*** (branch script node), ***Business Project, Solution, and Solution Advisor Log***.

Last Number

Enter the last identification number in use for this object. The system increases this number each time a new object is created. If you modify the number, be sure to enter a number greater than the existing number in order to prevent duplicates.



Click this button to increase the last number by one in order to test the autonumbering functionality.

Installing CRM Applications

Use the Installation component to set up general system defaults and to activate specific features of your PeopleSoft CRM application.

Installation - General Options Page

Usage	Use the Installation - General Options page when you install a PeopleSoft application to indicate whether you're using other PeopleSoft applications in the same database.
Object Name	RB_INSTALLATION
Navigation	Define Business Rules, Define General Options, Use E – Q, Installation
Access Requirements	None

General Options | **Calendar Options**

PeopleSoft Products

- ☒ FieldService
- ☒ Support
- ☒ Support-Customer Self Service
- ☒ HelpDesk
- ☒ HelpDesk-Employee Self Service
- ☒ Sales
- ☒ Sales Product Configurator
- ☒ Sales Activity Insight
- ☒ Marketing
- ☒ Interaction Management
- ☒ CTI Integration
- ☒ Customer Portal
- ☒ Employee Portal
- ☒ Campus Portal
- ☒ Government Portal
- ☒ CRM Portal Pack
- ☒ Mobile Sales for WAP Phones

Country: United States

Exchange Rate Type: Current Rate

☒ Collector/Credit Analyst Req.

HRMS Competency Option

Use Only Evaluation Type:

Installation - General Options page

The names of the applications that have been installed in your database are selected in the **PeopleSoft Products** group box.

Country The country code for your installation.

Exchange Rate Type The exchange rate that you are using for this PeopleSoft installation. Ask how this is used.

Collector/Credit Analyst Req. (collector/credit analyst required) Select this check box to make the Collector/Credit Analyst field a required field.

HRMS Competency Option

If you use PeopleSoft HRMS and use the competencies EIPs, this evaluation type will be displayed by the system.

Evaluation Type This option allows you to select which type of evaluations will be considered as the valid competency profile.

Installation - Calendar Options Page

Usage	Use the Installation - Calendar Options page to set which days and times your company normally works.
Object Name	RF_INSTALLATION
Navigation	Define Business Rules, Define General Options, Use E – Q, Installation, Calendar Options
Access	None

Requirements	
--------------	--

General Options

Calendar Options

Scheduling Options

Default Work Days

☒ Monday
 ☒ Tuesday
 ☒ Wednesday
 ☒ Thursday
 ☒ Friday
 ☐ Saturday
 ☐ Sunday

Start Time:

End Time:

Installation - Calendar Options page

Default Work Days	Establish the default definition for the common workdays of the week by selecting the appropriate check boxes
Start Time	Enter the organization's default definition for the usual workday start time.
End Time	Enter the organization's default definition for the usual workday end time.

Defining User Preferences

Before you set up user preferences, you must set up user IDs for the members of your project team who will define default codes and values. Once you've completed table setup and defined all default values, use the User Preferences pages to define profiles for your PeopleSoft users—those who will be using the system on a regular basis.

For more information about setting up user IDs, see PeopleSoft Authorization IDs.

User Preferences - Overall Preferences Page

Usage	Use the User Preferences - Overall Preferences page to specify overall preferences for PeopleSoft users.
Object Name	OPR_DEF_TABLE_RB1
Navigation	Define Business Rules, Define General Options, Use R – Z, User Preferences
Access Requirements	Enter a user ID.

Overall Preferences		Call Center Preferences	
User ID:	CCAG	Call Center Agent	
Business Unit:	US130	CRM HARDWARE/SOFTWARE	
SetID:	CRM02	Hardware Software	
As of Date:	01/01/2001		
Localization Country:	USA	USA	
Requester:	DVP1	Fitzwilliams, Marcia J	
<input type="checkbox"/> Alternate Character Enabled			

User Preferences - Overall Preferences page

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

Business Unit

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

SetID

An identification code that represents a set of control table information. SetIDs enable the sharing of a set of control table information across two or more business units.

As of Date

The last date for which a report or process includes data.

Localization Country

The country code for the localization country.

Requester

The requester ID that will appear by default on requisitions initiated by this user from the Manage Material component in PeopleSoft CRM FieldService or the RMA Form (return material authorization form) component in PeopleSoft CRM Support.

Important! If you integrate with PeopleSoft Purchasing, the requester ID must be a valid user ID and requisition requester in PeopleSoft Purchasing. **For more information** about defining valid requesters in PeopleSoft Purchasing, see *PeopleSoft Purchasing PeopleBook*.

Alternate Character Enabled

When you select this check box, alternate description buttons or links are activated. They appear to the right of fields on many of the application pages. You can click these buttons or links to enter or display alternate characters in the auxiliary pages that appear.

User Preferences - Call Center Preferences Page

Usage	Use the User Preferences - Call Center Preferences page to specify preferences that control the actions of the case search page.
Object Name	OPR_DEF_TABLE_RC
Navigation	Define Business Rules, Define General Options, Use R – Z, User

	Preferences
Access Requirements	Enter a user ID.

Overall Preferences		Call Center Preferences
User ID:	CCAG	Call Center Agent
<hr/>		
Maximum Rows in Case Search:	<input type="text" value="20"/>	<input checked="" type="checkbox"/> Auto execute saved search ?

User Preferences - Call Center Preferences page

Maximum Rows in Case Search

The case search page returns a list of results that match the search criteria specified by the user. Enter the maximum number of search results to be displayed at one time. Users can scroll through any additional results. The maximum number that you can enter is **300**.

Auto execute saved search?

The case search page enables users to reuse search criteria. Select this check box if you want the system to perform the search immediately when you select a saved search. This is the most efficient way to handle saved searches.

If you leave this check box clear, selecting a saved search populates the search criteria fields, but does not execute the search. This is the most flexible way to handle saved searches, because it gives the user the opportunity to modify the criteria.

Remember, when your search criteria uniquely identifies a row of data, performing the search brings you directly to the Case page. Therefore, you can only view or modify a saved search that uniquely identifies a row of data if this check box is clear.

Setting Up Locations

Use the Country Description, Address Format, and State pages to set up country and state descriptions and to configure address formats to meet the needs of a particular country. Then use the Location Definition and Location Detail pages to set default locations for specific setIDs and business units.

The PeopleSoft system contains fully populated country code and state code tables. We update these tables as national boundaries and designations change.

When you add, delete, or change location information in the PS_LOCATION_TBL record (of the Location Table), the system automatically publishes the Location Table EIP message to any other PeopleSoft or third-party applications that subscribe to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which

component or page is the source of the update to the PS_LOCATION_TBL record on the Location Table.

Country - Country Description Page

Usage	Use the Country - Country Description page to add or review country descriptions. PeopleSoft applications are delivered with fully populated country code tables. We update these tables as national boundaries and designations change.
Object Name	COUNTRY_DEFN
Navigation	Define Business Rules, Define General Options, Use A-D, Country, Country Description
Access Requirements	Enter a country.

Country - Country Description page

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

Description	Freeform text of up to 36 characters to describe the country.
Short Description	Freeform text of up to 15 characters to describe the country.
2-Char Country Code (2-character country code)	This code represents the value added tax (VAT) registration ID for each country in which a customer does business.
EU Member State (European Union member state)	To indicate that the country is a member of the European Union, select this check box. This tells the system to use euro conventions to translate currencies for this country.

Country - Address Format Page

Usage	Use the Country - Address Format page to configure the fields and field descriptions that the system displays for all addresses on pages so that the addresses conform to the customary address format and conventions of the
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	particular country. This format appears everywhere that the system uses the address subrecord.
Object Name	ADDR_FORMAT_TABLE
Navigation	Define Business Rules, Define General Options, Use A-D, Country, Address Format
Access Requirements	Enter a country.

Country Description | **Address Format**

Country: DEU Germany

Address Fields

Available	Label	Available	Label
<input checked="" type="checkbox"/> Address 1	Address 1:	<input type="checkbox"/> Number 1	
<input checked="" type="checkbox"/> Address 2	Address 2:	<input type="checkbox"/> Number 2	
<input checked="" type="checkbox"/> Address 3	Address 3:	<input type="checkbox"/> House Type	
<input checked="" type="checkbox"/> Address 4	P.O. Box:	<input type="checkbox"/> Field 1 Label	
<input checked="" type="checkbox"/> City	City:	<input type="checkbox"/> Field 2 Label	
<input type="checkbox"/> County		<input type="checkbox"/> Field 3 Label	
<input checked="" type="checkbox"/> State	State:	<input type="checkbox"/> Postal Search	
<input checked="" type="checkbox"/> Postal	Postal:		

GB Systems Information

National Registry Directory	Configuration File Prefix

Country - Address Format page

The system displays the **Country** that you entered to access the page. Use the options that you selected on the Address Format page to specify how the system should construct address pages throughout PeopleSoft. The standardized address page that you create for a country is used on transaction pages throughout the system. As a matter of convention, the country code is always used as the first field in the address page. When you select a country from the list of valid values, the system changes the address format to the standard format for that country.

Address Fields

The descriptions that you enter in each of the **Label** fields will appear as field labels on pages. Use the descriptions as needed to configure address formats so that they conform to the address requirements of each location. For example, you could enter *Province* or *Department* in the **State** label field and this value will appear as the label of the field on the address page instead of *State*.

If you select the **Number 1**, **Number 2**, **House Type**, **Street Type**, **Stair**, and **Block** fields, they take the place of the **Address 4** field on the address page and there will then be only three other address lines that will appear. For example, to enter a marina address, you could indicate the pier number and berth in fields **Number 1** and **Number 2**. In **House Type**, you could enter *Second Houseboat* to distinguish between two houseboats at the same berth.

Available	To format the standard address page for this country, select the appropriate check boxes in the Available column. Select the check box to activate the corresponding address field and its label for inclusion as part of the standard address format for this country.
Label	Select the Available check box to activate the corresponding address field and its label for inclusion as part of the standard address format for this country. The system displays the text that you enter in the Label field for an activated address field as the field label on the address page for this country.
Postal Search	To activate Postal Searching functionality for Dutch, Japanese, or UK addresses, select this check box. For the UK, when you select this check box the system makes the fields in the GB Systems Information group box available for entry.

GB Systems Information

The system displays the **GB Systems Information** group box only for UK addresses. Complete these fields if you have the Information Management Toolkit (IMTK) installed and configured. With this GB Information Management application installed, you can look up UK addresses by entering a postcode and, optionally, a house name or number.

National Registry Directory	Enter the location of the data files containing the postcode information.
Configuration File Prefix	Enter the location of the PeopleSoft-supplied configuration file (PS_GBSYS.INI).

State Page

Usage	Use the State page to add or review a state or province code. PeopleSoft applications are delivered with fully populated State code tables. We update these tables as boundaries and designations change.
Object Name	STATE_DEFN
Navigation	Define Business Rules, Define General Options, Use R-Z, State
Access Requirements	Enter a country and state.



State

Country: DEU Germany

State: BE

Description: Berlin

Numeric Code: 03

State page

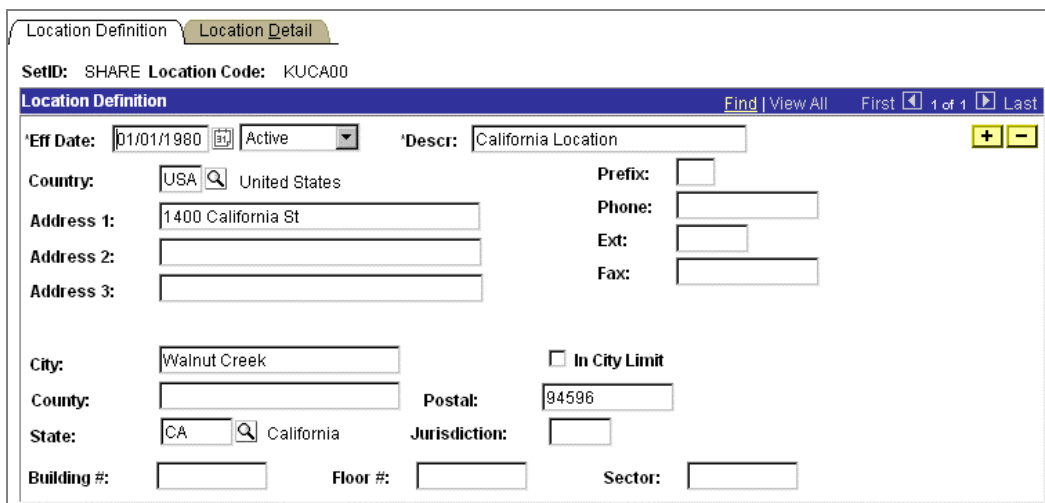
The system displays the **Country** and **State** that you entered to access the page.

Description Freeform text of up to 36 characters to describe the state.

Numeric Code Enter a code for statistical and reporting purposes.

Location Definition Page

Usage	Use the Location Definition page to maintain address information for a physical location within your organization, such as corporate headquarters, a branch office, a remote sales office, and so forth.
Object Name	LOCATION_TBL
Navigation	Define Business Rules, Define General Options, Use E-Q, Location
Access Requirements	Enter a setID and a location code.



Location Definition **Location Detail**

SetID: SHARE Location Code: KUCA00

Location Definition Find | View All First 1 of 1 Last

Eff Date: 01/01/1980 Active Descr: California Location

Country: USA United States Prefix:

Address 1: 1400 California St Phone:

Address 2: Ext:

Address 3: Fax:

City: Walnut Creek In City Limit

County: Postal: 94596

State: CA California Jurisdiction:

Building #: Floor #: Sector:

Location Definition page

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

Eff Date (effective date)	Date on which a table row becomes effective; the date that an action begins. In the drop-down list box next to this field, select the status of this record: <i>Active</i> or <i>Inactive</i> .
Descr (description)	Freeflow text to describe the nature of the location. Enter a description for this location code.
Country	Country for the location. Other address fields adjust to reflect the country choice.
Address 1	Freeflow text entry field that enables you to describe street, street number, apartment number, and other address information.
Address 2	Freeflow text entry field that enables you to describe street, street number, apartment number, and other address information.
Address 3	Freeflow text entry field that enables you to describe street, street number, apartment number, and other address information.
Prefix	The prefix for the phone number.
Phone	The telephone number for the location.
Ext. (extension)	Any relevant extension for the phone number.
City	The name of the city. Depending on the country and how you've configured the address format, the name of this field appears according to your assigned designations—Department, State, Province, Bundesland, Prefecture—or whatever other appropriate field name you selected.
In City Limit	This check box is used by third-party tax provider products to determine additional city taxes where applicable.
County	Name of the county for the address, if applicable.
Postal	The postal code for both U.S. and international addresses.
State	The state (if a U.S. location) or province code (if a Canadian location).
Jurisdiction	The jurisdiction that this location falls under.
Building # (building number)	The number of the building, if applicable.
Floor # (floor number)	The floor of the building.
Sector	The sector of the building

Location Detail Page

Usage	Use the Location Detail page to enter specific information relative to this location.
Object Name	LOCATION_TBL2
Navigation	Define Business Rules, Define General Options, Use E-P, Location, Location Detail
Access Requirements	Enter a setID and location code.

Location Definition Location Detail

SetID: SHARE Location Code: KUCA00

Location Detail Find | View All First 1 of 1 Last

Eff Date: 01/01/1980 Status: Active Descr: California Location + -

Attention:

Location Detail:

Location Detail page

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

Location Detail

Use this group box to enter more detailed information about the location. The **Eff Date** (effective date), **Status**, and **Descr** (description) fields are populated with information from the Location Definition page.

Attention The name of the person whose name should appear in the Attention field of the correspondence for the location.

Location Detail Enter descriptive text about the location.

Associating Time Zones With Locations

You can associate a time zone with a specific location and find locations that don't have assigned time zones with the Location Time Zone page. This page enables you to enter a setID and a location code and find rows in your tables that don't have time zones assigned to them. From the results grid, you can then select the correct time zone for the location.

Location Timezone Page

Usage	Use the Location Timezone page to associate a time zone with a location.
Object Name	RB_LOC_TIMEZONE
Navigation	Define Business Rules, Define General Option, Use E – Q, Location Timezones
Access Requirements	None

Location Timezone

SetID: Location Code: ☐ Show Unassigned Rows Only

Location Code	Description	Time Zone	Country	City	State	Postal Code
KCSK00	Regina Office		CAN	Regina	SK	H2D2P7

Location Timezone Page

SetID	Select the setID for this time zone.
Location Code	Select a location code from the Location table.
Show Unassigned Rows Only	Select this check box to display only those locations without a time zone.
Search	Click the Search button to display the time zone for that location code and setID.

Time Zone Results

The system returns search results in the Location Timezone group box.

Setting Up Departments

After you define company and location data for your enterprise, use the Department Table to define business entities in your organization.

Enterprise Integration Point Related to the Department Table

When you add, delete, or change department information in the DEPT_TBL record (of the Department Table), the system automatically publishes the Department Table EIP (enterprise integration point) message to any other PeopleSoft or third-party applications that subscribe to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message. The system publishes the message regardless of which component or page is the source of the update to the DEPT_TBL record on the Department Table.

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

Department Page

Usage	Use the Department page to track departments and their managers and to add or modify a department.
Object Name	DEPARTMENT
Navigation	Define Business Rules, Define General Options, Use A – D, Department
Access Requirements	Enter a setID and a department ID.

Department

SetID: CRM01 Department: 100

Department Information Find | View All First 1 of 1 Last

*Effective Date: 05/28/2001 *Status: Active

*Description:

*Short Description:

Manager EmplID: Manager Name:

Department page

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

Effective Date	Date on which a table row becomes effective; the date that an action begins.
Status	Select <i>Active</i> or <i>Inactive</i> .
Description	Freeform text to describe the department.
Short Description	Freeform text of up to 15 characters.
Manager EmplID (manager employee ID)	The employee ID for the department manager. Select from a list of IDs that have been entered on the Personal Data page.
Manager Name	Display-only field that indicates the name of the person associated with the manager ID.

Defining Regions

Use the Region object to track information about the geographical regions where your customer has offices, headquarters, or other facilities that might need to contact your company. The regions are arranged in a configuration called a *region hierarchy*.

Region Page

Usage	Use the Region page to set up regions.
Object Name	RB_REGION
Navigation	Define Business Rules, Define General Options, Use R – Z, Regions
Prerequisites	Other parent regions may need to be defined.
Access Requirements	Enter a region ID.

Region

Region ID: CALIFORNIA

Description: California Service Region Status: Active

Parent Region ID:

Region Hierarchy

First | Previous | Next | Last | Left | Right

- + CALIFORNIA - California Service Region
- + NORTH AMERICA - North America
- + WORLD - World

Last Modified: 04/03/2001 10:30AM PDT NAPA

Region page

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

Description

The name for a particular region type.

Status

Select *Active* or *Inactive*.

Parent Region ID

The region ID that is the parent of the region that you are entering. This field sets up the hierarchical relationship for regions and enables you to create parent/child relationships.

Last Modified

The date, time, and user ID of the last person who added or modified this information.

Setting Up Salutation Codes

Set up salutation codes to use when you correspond with your customers.

Salutation Table Page

Usage	Use the Salutation Table page to set up salutations for correspondence with customers.
Object Name	SALUTATION_TABLE
Navigation	Define Business Rules, Define General Options, Use R-Z, Salutation Table
Access Requirements	Enter a salutation code.

The screenshot shows a web form titled "Salutation Table". It contains three input fields: "Salutation Code:" with the value "MS.", "Description:" with a long text box, and "Short Description:" with a shorter text box.

Salutation Table page

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

Description Freeflow text to describe the salutation.

Short Description Freeflow text of up to 15 characters.

Entering Units of Measure

All PeopleSoft applications use units of measure (UOMs) to quantify resources. Depending upon the application and the type of resource being quantified, UOMs may represent a variety of parameters, including physical dimensions, weights, volumes, quantities, or amounts of time.

You establish all of the UOMs that you need on the Units of Measure page and then assign these UOMs to your resources. You must associate each resource with a standard UOM. Standardization helps you control the units that appear in reports and enables you to take advantage of the PeopleSoft automatic conversion features, which simplify data entry and reduce the potential for error when you calculate or convert transaction amounts.

The specific method you'll use to assign UOMs to your resources varies from one application to another. **For more information** about assigning UOMs, see your application PeopleBook.

You can view information about the UOMs you have set up and the resources to which they are assigned on the Units of Measure report.

Units of Measure Page

Usage	Use the Units of Measure page to establish UOMs for your resources.
Object Name	UNITS_OF_MEASURE
Navigation	Define Business Rules, Define General Options, Use R-Z, Units of Measure
Access Requirements	Enter a unit of measure.

Units of Measure

Unit of Measure: EA
Description: Each
Short Description: Each

Unit Of Measure Conversions				Find View All	First	1-4 of 4	Last
*Convert To	*Conversion Rate	Inverse					
BOX	0.25000000	4.00000000	+	-			
CS	0.06250000	16.00000000	+	-			
EA	1.00000000	1.00000000	+	-			
ST	1.00000000	1.00000000	+	-			

Units of Measure page

The system displays the **Unit of Measure** (UOM) that you entered to access the page.

Enter a **Description** and a **Short Description** for the UOM.

Unit of Measure Conversions

To assign a default conversion rate between this UOM and another unit of measure, select a **Convert To** UOM and enter a **Conversion Rate**. The system automatically calculates the **Inverse** conversion rate.

CHAPTER 7

Setting Up Security

If you've ever been concerned about data integrity, confidentiality, or user productivity, you understand the value of a well-designed security system. PeopleSoft applications use the capabilities and flexibility of multilevel security to provide an efficient, effective solution to your security issues.

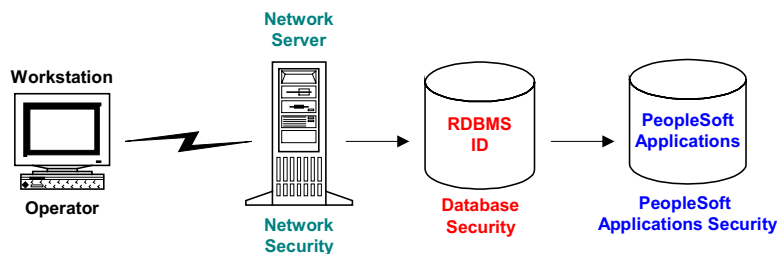
Understanding the Approach to Application Security

When you manage an environment in which you share data, you need a security system that protects data at various access levels. You also need the flexibility to define the most effective and efficient path to that data across business groups, tables, departments, pages, and so forth. To address these requirements, PeopleSoft uses an approach that enables you to set up data access at different entry points within your system.

Security access falls into three categories:

- Network security
- Database security
- PeopleSoft application security

Network security controls the overall point of entry into your system's hardware and software resources. Once a user enters the system, database security narrows the scope of user access to your information assets. When you finally get to your application, you can implement security down to the level of an individual field.



Levels of Security

Most system users typically have access to a defined set of functions, pages, or fields that enable them to perform their jobs. Examples of such users are:

- Salespeople, who access product data and enter orders.

- Customer service representatives, who access transaction records to help solve customer problems.
- Marketing people, who design and execute marketing campaigns.

In PeopleSoft applications, you have full control over security definitions and how they fit together. The security options you select create a matrix that enables or blocks user access to your data through a series of authorizations. Typical users pass through several levels of authorizations before the system grants them access to any subset of your data.

Learning the Vocabulary of Security

Before you can fully enable security, you must understand the security terms and functions used at each level of your system.

Security Type	Where Implemented	Function
Network	Network software	Controls entry into the network and authorizes rights to use shared resources.
RDBMS (Relational Database Management System)	Operating system	Controls access to the database.
User	PeopleTools	Controls access to application pages, functions, and business components.
Object	PeopleTools	Controls access to objects or object groups used in application development.
Query	PeopleTools	Defines which set of table rows a user can access while making system queries.
Row-Level	PeopleTools and PeopleSoft applications	Controls access to the subset of data rows within tables to which the user has authority.
Field-Level	PeopleCode	Controls access to individual fields within pages.

Specifying Row-Level Security Options

To establish security within your PeopleSoft application, you must decide which level of security to establish throughout your system, which key fields to secure, and whether security will be handled through user IDs or roles. You can implement security to restrict individual users or roles from specific rows of data that are controlled by such key fields as SetIDs and business units. You can also limit users to accessing only a specific subset of rows. For example, you can use user ID security to limit the access of your auditor in Paris to the business unit for your European division. Or, if you have a team of auditors in Paris, you can

add them all to a role and then use role security to enforce the appropriate limits on their system access.

A user may be assigned to one or more roles, providing considerable flexibility to access necessary resources. As a result, a user who is linked to more than one role can use the menu items assigned to any of those roles.

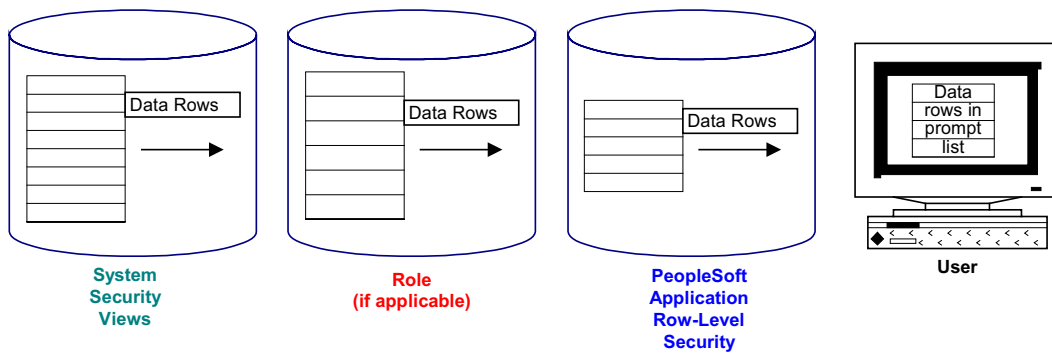
Some security attributes—such as row-level security—cannot, however, be defined by combining roles. Only one role can be used for this purpose. In PeopleTools, Maintain Security, you designate row-level security for a user by selecting a role. The row-level security attributes for the role you select then become the security attributes for that user.

For more information about specifying Row-Level Security for users, see Maintaining Row-Level Security.

Because various combinations of security are possible, it is important to understand the effects of row-level security when you use the following mix of system security options and roles:

<i>System Security</i>	<i>Role of User ID</i>	<i>Row-Level Security</i>
No Security	User ID is not linked to a role.	Not applicable; each user can access any object because there is no security implemented.
User Level Security	User ID is not linked to a role.	Defined in the application by key field security.
Role Level Security	A User ID is normally assigned to a Row-Level security role. It is possible, however, to link a User ID to multiple roles, but not when you specify row-level security.	Defined by a Row-Level Security role. If a User ID is not assigned to a Row-Level security role, then that user will have access to menu items, but will not have access to any application pages with key fields enabled for row-level security.

You need to set up which users or roles have access to specific business units, SetIDs, and any other key fields your application requires. For example, you might want to permit access to only one business unit for a certain role of users.



Data Filtering Process

When a user in this role enters data, the system prompts for a business unit because this is the primary key for data related to the business unit. The available selections on the prompt list for this user include only the business units for which the user has been granted authority. What appears in the prompt list is data that has been filtered through one or more levels of security.

Maintaining Row-Level Security

The sheer number of users assigned the same level of security should be a key factor in determining whether your type of security should be based on user ID or role maintenance. If there are thousands of users who have identical access requirements, it may be a good idea to explore the use of roles. By assigning these users to a single role, subsequent changes in access requirements for these users can be made once rather than a thousand times.

Predefined Security Roles

PeopleSoft provides several roles with predefined user profiles and permission lists in your demonstration database to illustrate the functionality and versatility of the new security architecture. These sample security configurations can be used as is, or modified to meet your specific security requirements.

The demonstration database includes the following predefined User IDs and associated roles:

PeopleSoft CRM System Administrator User ID

<i>User ID</i>	<i>Password</i>	<i>Role(s)</i>
SYSADM	SYSADM	System Administrator

PeopleSoft CRM HelpDesk/Support User IDs

<i>User ID</i>	<i>Password</i>	<i>Role(s)</i>
CCAG	CCAG	Call Center Agent (Support)
CCDIR	CCDIR	Call Center Director

<i>User ID</i>	<i>Password</i>	<i>Role(s)</i>
CCMGR	CCMGR	Call Center Manager
CCSPEC	CCSPEC	Call Center Specialist
HELPA	HELPA	HelpDesk App Admin
HELPA	HELPA	HelpDesk Agent
HELPMGR	HELPMGR	HelpDesk Manager
SOLTNMGR	SOLTNMGR	Solution Manager
SUPPA	SUPPA	Support App Admin
TECHSPEC	TECHSPEC	Technical Specialist

PeopleSoft CRM FieldService User IDs

<i>User ID</i>	<i>Password</i>	<i>Role(s)</i>
FSENG	FSENG	FieldService Engineer
FSAA	FSAA	FieldService App Admin
DISPATCH	DISPATCH	Dispatcher
TECHSUP	TECHSUP	Technical Support
FSAG	FSAG	FieldService Agent
FSMGR	FSMGR	FieldService Manager
FSPART	FSPART	FieldService Partner
RECAG	RECAG	Receiving Agent
INVAG	INVAG	Inventory Agent
PURCHAG	PURCHAG	Purchasing Agent
INVMGR	INVMGR	Inventory Manager
DVLENG	DVLENG	Development Engineer
ENGMGR	ENGMGR	Engineering Manager
PRODMGR	PRODMGR	Product Manager
DOCMGR	DOCMGR	Document Manager

PeopleSoft CRM Interaction Management User IDs

<i>User ID</i>	<i>Password</i>	<i>Role(s)</i>
UNIVREP	UNIVREP	Universal Rep (PeopleSoft CRM Interaction Management)

PeopleSoft CRM Marketing User IDs

<i>User ID</i>	<i>Password</i>	<i>Role(s)</i>
MKTMGR	MKTMGR	Marketing Manager
MKTAA	MKTAA	Marketing App Admin
SRVCONA	SRVCONA	Service Contract Administrator
CAMPMGR	CAMPMGR	Campaign Manager
MKTANAL	MKTANAL	Marketing Analyst
MKTRES	MKTRES	Marketing Researcher (place holder-TBD)
MKTCRT	MKTCRT	Marketing Creative (place holder-TBD)

PeopleSoft CRM Sales User IDs

<i>User ID</i>	<i>Password</i>	<i>Role(s)</i>
SLSREP	SLSREP	Inside Sales Rep
FLDSLSREP	FLDSLSREP	Field Sales Rep
SLSMGR	SLSMGR	Sales Manager
LDQUAL	LDQUAL	Lead Qualifier (place holder-TBD)
SLSAA	SLSAA	Sales App Admin
CHSLSMGR	CHSLSMGR	Channel Sales Manager

Permission Lists

The following tables list the permission lists assigned to each predefined role, as well as the corresponding menus and components (web pages) that are available to users assigned to the particular permission list.

Permission Lists

<i>Perm List ID</i>	<i>Description</i>	<i>Menus</i>	<i>Components</i>
CRRA1000	Campaign Management Setup	Marketing Campaigns	Define Channel Cost
			Define Content
			Define Costs
			Define List Details
			Define Metrics

Perm List ID	Description	Menus	Components
			Maintain Offer
			Campaign Management
			Campaign Detail
			Review Price Sets
			Import Price Sets
			Export Campaign List
			Initiate Campaign Processing
CRRA1110	Campaign Mgmt Reports	Campaign Reports	Campaign Management
			Content Management
			Campaign-Content Management
			Campaign Effectiveness
			Campaign Expense
			Wave Effectiveness
			Campaign & Wave Effectiveness
			Task Management
			Channel Performance
			List Performance
			Product Performance
			ROI
CRRA1200	Workflow	Workflow	Define Campaign Workflow
			Define CampList Workflow
			Define Workflow Messages
			Define Trigger List
			Define Trigger Send Action
			Initiate Trigger Processing

Perm List ID	Description	Menus	Components
			Timeout Escalations
CRR9000	Structure Campaign Management	Define Business Rules CRM	Channels
			Metric Types
			Metric SubTypes
			Cost Types
			Content Types
			Content Sub Types
			Trigger Action Types
			Task Types
			CM Page Fields
			CM User Filters
CRRB1000	Review Products	Product Definition	Product Definition
			Specifications
			Aliases
			Product Kit
			Kit Components
			Messages
			Notes
CRRB1010	Define Products	Product Definition	Product Definition
			Group Codes
			Link Product to Group
			Product Attributes by UOM

<i>Perm List ID</i>	<i>Description</i>	<i>Menus</i>	<i>Components</i>
			Price
			Brand
			Category
			Setup Products for Upsells
			Competitor Codes
			Load Products From Stage
			Summary of Errors
			Product Alternate Errors
			Product Definition Errors
			Product Message Errors
			Product Note Errors
			Product Note Document Errors
			Product Note KeyWord Errors
			Product Currency Errors
			Product Competitor Errors
			Product Spec Type Errors
			Product Specifications Errors
			Product Group Errors
			Product Kit Errors
			Kit Component Price Errors

Perm List ID	Description	Menus	Components
			Product UOM Errors
			Product UOM by Currency Errors
			Product Price by BU Errors
			Product Price Errors
			Installed Product
CRRB1100	Define Item Controls	Item Definition	Item Families
			Item Groups
			Stock Types
			Item Number Control
CRRB1200	Define Items	Item Definition	Inventory Item Definition
			Units of Measure
			Assemblies
CRRB1210	Review Items	Item Definition	Review Item Definition
			Review Assemblies
CRRB1300	Customer	Customers (CRM)	Contacts
			Customer Details
			Addresses
			Interactions
CRRB1400	Workforce-Provider Groups	Workforce	Provider Groups
			Provider Group Members
CRRB1420	Workforce-Worker	Workforce	Worker

<i>Perm List ID</i>	<i>Description</i>	<i>Menus</i>	<i>Components</i>
CRRB1600	Workforce-Calendar	Workforce	Monthly Calendar
CRRB1600	Workforce-Calendar	Workforce	Daily Calendar
CRRB1605	Workforce-Adjust Schedule	Workforce	Adjust Schedule
CRRB1610	Workforce-Process Holiday Load	Workforce	Process Holiday Load
CRRB1630	Workforce-Competencies	Workforce	Adjust Criteria
			Identify Competencies
CRRB1700	Open Worklist	Worklist	Group Worklist
			My Worklist
			All Worklist View
			Business Project Worklist
			Campaign Task Worklist
			Campaign Worklist
			Case Worklist View
			Content Task Worklist
			Content Worklist
			List WorkList
			Notification Worklist
			Offer WorkList
			Receive Notification
			RMA Worklist
			RQ_worklist

Perm List ID	Description	Menus	Components
			Send Notification
			Service Order Worklist
CRRB9000	Administer Security	Define Business Rules CRM	Apply Security Setups
			Security Options
			TableSet Security by Perm List
			TableSet Security by User ID
			Unit Security by Perm List
			Unit Security by User ID
			Security View Names
CRRB9020	Define General Options	Define Business Rules CRM	Market Rate Definition
			Market Rate Index
			Market Rate Type
			Market Rates
			Competencies
			Competency Rating Model
			Competency Types
			Contact Type Codes
			Contact Us Subject
			Contact Us Topic
			Currency Code
			Currency Exchange Calculator

Perm List ID	Description	Menus	Components
			Currency Quotation Method
			Cross/Reciprocal Rate Calc
			Country
			Location
			Location Timezones
			State
			Workflow Action Requests
			Workflow Actions
			Workflow CRM Defaults
			Worklist Display Component
			Worklist Groups
			Cross Rate Calc
			Reciprocal Rate Calc
			Assignment Weighting Factors
			Automatic Numbering
			Collector
			Cost Categories
			Credit Analyst
			Department
			Holiday Schedule
			Installation

Perm List ID	Description	Menus	Components
			Job Codes
			Problem Codes
			Regions
			Salutation Table
			Task Types
			Unit Of Measure
			User Preferences
			Worker Functions
CRRB9030	Structure Searching	Define Business Rules CRM	Define Search Index Template
			Define Search Settings
			Universal Search Tool
			Search Query Test
			Build Search Collection
			Build Collections
			Record-Based Collections
			DO NOT INCLUDE
CRRB9041	Establish Business Units-RF	Define Business Rules CRM	FieldService Definition
CRRB9042	Establish Business Units-RA	Define Business Rules CRM	Marketing Definition
CRRB9044	Establish Business Units-RS	Define Business Rules CRM	SFA Definition
CRRB9045	Establish Business Units-RC	Define Business Rules CRM	Call Center Definition
CRRB9080	Define Remote Data Access	Define Integration Rules	Setup Customer ID Owner

Perm List ID	Description	Menus	Components
			Test XML Catcher
CRRB9100	Define CTI Setup	Define Integration Rules	CTI Configuration
			CTI Mapping
			CTI Test Page
			CTI Target Page
CRRB9120	Structure Process Automation	Define Business Rules CRM	Track Business Project Status
			Track Task Status
CRRB9125	Structure Process Automation-Setup	Define Business Rules CRM	Event Definition
			Event Model
			Event Set
			Email Template
			Business Project
			Phase
			Task
			Trace Settings
			Trace Results
			Value List
CRRB9130	Branch Scripting	Define Business Rules CRM	Branch Script Node Definition
			Branch Script Definition
CRRB9135	Branch Scripting Execution	Define Business Rules CRM	Branch Script Execution
CRRB9140	Manage Integration Rules	Define Integration Rules	Review Centralized Error Mgmt

<i>Perm List ID</i>	<i>Description</i>	<i>Menus</i>	<i>Components</i>
			Review Xml Schema
			Batch Publish
			Full Data Publish
			Inbound File Publish
			Effective Date Publish
			Effective Date Prior Publish
			InBound Data Error Scan
			Generate ERD Relationships
			Batch Publish Rules
			Full Data Publish Rules
			Inbound File Rule
			Chunking Rule Definition
			Map Node to ChunkRule
			Manage ChunkRule BU Mapping
			Map BU to ChunkRule/Node
			Map ChunkRule/Node to BU
			Manage ChunkRule SetID Mapping
			Map SetID to ChunkRule/Node
			Map ChunkRule/Node to SetID
			Manage ChnkRule RecGrp Mapping

Perm List ID	Description	Menus	Components
			Data Maint Utility Setup
			Dummy page to attach process
CRRB9160	Maintain Product Configurator	Define Business Rules CRM	Review Selective Rules
			Review Selective Trees
			Perform Variable Search
			Action Code
			Constant
			Constraint
			Global Variable
			Internal Variable Test
			Matrix Detail Copy
			Matrix Detail Test
			Option Variable
			All Print Codes
			Print Code
			Secondary Variable
			Tree
			Internal Query
			Internal Variable
			Matrix Detail
			Matrix Header

Perm List ID	Description	Menus	Components
			Multiple Option
			Operand
			Rule
			Template
			Value List
			Variable Type
			Rule Report
			Tree Report
CRRB9175	DataExchanges-InboundTransctns	Define Business Rules CRM	Data Definition Maintenance
CRRB9180	CRM Portal-Cust Selection	Portal Administration	Customer Selection
CRRB9181	CRM Portal-Self-Service Support	Portal Administration	Self Service Support
CRRB9181	CRM Portal-Self-Service Support	Base Portal Data	Self Service Support (Future)
CRRB9182	CRM Portal-Contact Directory	Portal Administration	Contact Directory
CRRB9183	CRM Portal-Contact Us	Portal Administration	Contact Us
CRRB9184	CRM Portal-User Profile Maint	Portal Administration	User Profile Maintenance
CRRB9185	CRM Portal-SS HelpDesk	Base Portal Data	Self Service HelpDesk
CRRC1110	Review Cases-CC Process Histry	Cases	Review Credit Crd Process Hist
CRRC1120	Review Cases-Solutions	Cases	Review Solution
			Review Solution (Hidden)
			Solution Advisor
CRRC1130	Cases-Manage Time	Cases	Manage Time

Perm List ID	Description	Menus	Components
CRRC1400	Cases-HelpDesk	Cases	HelpDesk
			HelpDesk - Add Case
			HelpDesk - Update Case
CRRC1420	Cases-Support	Cases	Support
			Support - Add Case
			Support - Update Case
CRRC1430	Cases-Search	Cases	Case Search
CRRC1470	HelpDesk Reports	Cases	HelpDesk Case By Agent
			HelpDesk Case By Business Proc
			HelpDesk Case By Ctg/Type/Dtl
			HelpDesk Case By Department
			HelpDesk Case By Employee
			HelpDesk Case By Priority
			HelpDesk Case By Problem Type
			HelpDesk Case By Status
			HelpDesk Case Information
			HelpDesk Case Status By Agent
			HelpDesk Time To Close By Agnt
CRRC1480	Support Reports	Cases	Agreement Statistics
			Cases By Age

Perm List ID	Description	Menus	Components
			Cases By Agent
			Cases By Customer
			Cases By Priority
			Cases By Product
			Cases By Type
			Cases Reopened and Closed
			Employee
			Support Agreement Dates
			Support Case Information
CRRC1550	Manage Solutions	Solutions	Solution
			Make Solution From Resolution
			Merge Similar Solutions
CRRC1560	Process Solutions	Solutions	Update Solution Usage Counts
CRRC1570	Solution Reports	Solutions	Solutions Report
			Top Solutions Report
CRRC1600	Employee SS- HelpDesk	My Information	Report Problem
			Review Problems
			Review Problem Report
CRRC1610	Customer SS-Support	Cases	Review Problems (Customer SS)
			Review Problem Report(Cust SS)
			Report Problem (Customer SS)

Perm List ID	Description	Menus	Components
CRRC9000	Structure Call Center	Define Business Rules CRM	Status
			Case Type
			Priority
			Severity
			Source
			Contact Method
			Problem Type
			Quick Code
			Category
			Specialty Type
			Detail
			Note Type
			Reason Interested
			Relationship Type
			Audit - Setup
			Define Last Numbers
CRRC9010	CIC Pagelet Setup	Define Business Rules CRM	Sub-Page Setup
			Sub-Page Search Criteria
CRRC9020	Structure Call Center-Credit Card	Define Business Rules CRM	Credit Card Setup
			CyberSource Setup
CRRC9500	Pagelet-Call Center Chart	Base Portal Data	Call Center Summary Chart 1

Perm List ID	Description	Menus	Components
			Call Center Summary Chart 2
			Call Center Summary Chart 3
			Call Center Detail Chart
CRRC9500		CRM Pagelet Extensions	RC Sum 1 Chart Customization
			RC Sum 2 Chart Customization
			RC Sum 3 Chart Customization
			RC Detail Chart Customization
CRRF1000	Agreements	Agreements	RC Sum 1 Chart Customization
			RC Sum 2 Chart Customization
			RC Sum 3 Chart Customization
			RC Detail Chart Customization
CRRF1100	Dispatch Board	Service Orders	Dispatch Board
CRRF1200	Service Orders	Service Orders	Manage Time
			Manage Time CI
			Manage Expenses
			Manage Expenses CI
			Manage Material
CRRF1210	Service Orders-RF/RC	Service Orders	Service Orders
CRRF1220	My Service Orders	Service Orders	My Service Orders
CRRF1230	FieldService Reports	Service Orders	Dispatch Performance Report

Perm List ID	Description	Menus	Components
			Expense Report
			Expense Report By Customer
			Mean Time To Repair Report
CRRF1300	RMA	Returns	RMA Form
CRRF9000	Structure FieldService	Define Business Rules CRM	Service Types
			Activity Types
			Activity Codes
			Services
			Dispatch Board Setup
CRRF9010	Maintain Entitlements	Define Business Rules CRM	Service Level
			Entitlements
			Entitlement Plan
CRRI1000	Interactions	Interactions	Interactions
			Interaction Details
			Interactions by Customer
CRRI1100	Developer Utilities	Developer Utilities	Solution Advisor
			Solution Management Defaults
			Test Solution Advisor
			Test Get PO/IUT BI
CRRI9500	Pagelet-CIC-Home	Base Portal Data	Customer Search
CRRI9500	Pagelet-CIC-Home		360 Degree View (Home)

Perm List ID	Description	Menus	Components
CRR19500	Pagelet-CIC-Home		360 Degree View
CRR19500	Pagelet-CIC-Home		Customer Search
CRR19510	Pagelet-CIC-Add New Lead	Base Portal Data	Add New Lead
CRR19520	Pagelet-CIC-Agreements	Base Portal Data	Agreements
CRR19530	Pagelet-CIC-Contact List	Base Portal Data	Contact List
CRR19540	Pagelet-CIC-CRM Worklist	Base Portal Data	CRM Worklist
CRR19550	Pagelet-CIC-Interactions	Base Portal Data	Current Interaction
			Recent Interactions
CRR19560	Pagelet-CIC-Cust Info	Base Portal Data	Customer Information
			Installed Products
CRR19590	Pagelet-CIC-RMA	Base Portal Data	RMA
CRR19600	Pagelet-CIC-Service Orders	Base Portal Data	Service Orders
CRR19610	Pagelet-CIC-Support	Base Portal Data	Recent Support Cases
CRRQ1000	Setup Failures/Fixes	Quality	Define Failure Status
			Define Failure Status Reason
			Define Failure Causes
			Define Failure Symptoms
			Define Valid Status Combinatns
CRRQ1050	Failures/Fixes	Quality	Failure or Request
			Fix or Enhancement
			Group Failure/Request

Perm List ID	Description	Menus	Components
			Failure Search Page
CRRQ1100	Setup Products	Quality	Component Definition
			Component Relation
			Component Type
CRRQ1150	Products	Quality	Component Versions
CRRQ1200	Setup Workflow	Quality	Define Triggers
			Define Action Requests
CRRS1000	Leads	Leads	Sales Leads
			Lead Details
			Import Leads
CRRS1000	Leads	Base Portal Data	My Tasks
			My Leads
CRRS1100	Opportunities	Opportunities	Opportunity
			Details
			Task List
			Create Quote
		Base Portal Data	My Opportunities
CRRS1110	Opportunity Reports	Opportunities	Activity Summary Report
			Company Report
			Opportunity Report
			Cust Rev Rank By Prod Grp Rpt
			Rank By Industry Report

Perm List ID	Description	Menus	Components
			Rank By Region Report
CRRS1200	Forecasts	Forecasts	Revenue Forecast Rollup
			Review Forecast Summary
			Create Shadow Forecast
			Shadow Forecast Rollup
			Review Shadow Summary
			Auto Generate Shadow Forecast
CRRS1210	Forecast Reports	Forecasts	Forecast By Product Report
			By Sales Rep Report
			Product Grp Review Revenue Rpt
			Revenue Fallout Analysis
			Product Group Report
CRRS1220	Generate Revenue Forecast	Forecasts	Create Revenue Forecast
			Auto Generate Revenue Forecast
		Base Portal Data	My Forecast
CRRS1300	Territories	Territories	Territory Management Home
			Create Territory Tree
			Review/Update Tree
			Reassign Opportunities
			Reorganize Tree

Perm List ID	Description	Menus	Components
			Territory Management
CRRS9000	Structure Sales Force	Define Business Rules CRM	Lead Sources
			Industries
			Ship Via
			Alliance Partners
			Channel Partner
			Contact Roles
			Forecast Types
			Sales Process
			Fulfillments
			Forecast Definition
			Time Frames
			Default Text for Quotes
			Access Profiles
			Sales Users
			Sales Activity Insight Options
			Sales Access Update
			Create BAM Report
			Fallout Reason
CRRS9010	Sales Team Setup	Define Business Rules CRM	Sales Team
CRRS9020	Struc Sales Force- Personalize	Define Business Rules CRM	Page Columns for a User

Perm List ID	Description	Menus	Components
			Page Filters for a User
			Page Sections for a User
			Default Page Fields (Hidden)
			Default Page Fields
			Default Page Sections
CRRS9500	Pagelet-My Monthly Calendar	Base Portal Data	My Monthly Calendar
EPRB1000	Customers	Customers (FDM)	Maintain Contacts
			Customer Credit
			Customer Notes
			Maintain Customer
			Create Customer
			View Customer Address
			Customer Conversations
			Communicate Back to Customer
EPRB1100	Orders/Quotes	Orders/Quotes	Create Quote
			Create Sales Order
EPRB1200	Returns	Returns	Create RMA
EPRB1300	Billing/Payments	Billing/Payments	View Invoice
			View Account Balance
			View Payment History
			View Product Notes

Perm List ID	Description	Menus	Components
			Product Pricing
			Price/Availability
			Product Inquiry
EPRB1400	CSR Desktop		CSR Desktop
EPRB1500	Define Integration Rules	Define Integration Rules	CTI Transfer Page
EPRF1000	View Item Balances	Items	Verify Balances by Unit
			By All Units
			By Location
			Negative Balances
EPRF1020	View Transaction History	Items	Review Transaction History
EPRF1030	View Adjustments	Items	Review Adjustments
EPRF1040	Item Transfer	Items	Transfer Items
EPRF1050	Utilization Rules Setup	Items	Setup Utilization Rules
EPRF1060	Utilization Type Calculation	Items	Calculate Utilization Type
EPRF1070	Express Issue	Items	Order Items/Express Issue
EPRF1080	View External Shipment History	Returns	Review External Shipments
EPRF1090	View Internal Shipment History	Returns	Review Internal Shipments
EPRF1100	View Replenishment Requests	Items	Review Replenishment Requests
EPRF1110	View Shipment History	Items	Rvw Shipmnts to Track Usage
EPRF1120	View Requisition	Items	Requisition Inquiry

<i>Perm List ID</i>	<i>Description</i>	<i>Menus</i>	<i>Components</i>
EPRF1130	View PO	Items	PO Inquiry
EPRF1140	Item Definition	Item Definition	Item Definition
EPRF1150	Business Unit Item Definition	Item Definition	Business Unit Item Definition
EPRF1160	InterUnit and RMA Receiving	Returns	Receipt Status/RMA Storage Loc

Permission Lists by Application

The following tables display the permission lists that are assigned to each predefined role.

Permission Lists by PeopleSoft CRM System Administrator Role

<i>Role</i>	<i>Permission Lists</i>
System Administrator	CRRA1000
	CRRA1100
	CRRA1110
	CRRA1200
	CRRA9000
	CRRB1000
	CRRB1010
	CRRB1100
	CRRB1200
	CRRB1210
	CRRB1300
	CRRB1400
	CRRB1420
	CRRB1600
	CRRB1605
	CRRB1610
	CRRB1630
	CRRB1700
	CRRB9000
	CRRB9020

Role	Permission Lists
	CRRB9030
	CRRB9041
	CRRB9042
	CRRB9044
	CRRB9045
	CRRB9080
	CRRB9100
	CRRB9120
	CRRB9125
	CRRB9130
	CRRB9135
	CRRB9140
	CRRB9160
	CRRB9175
	CRRB9180
	CRRB9181
	CRRB9182
	CRRB9183
	CRRB9184
	CRRB9185
	CRRC1110
	CRRC1120
	CRRC1130
	CRRC1400
	CRRC1420
	CRRC1430
	CRRC1470
	CRRC1480
	CRRC1550
	CRRC1560
	CRRC1570
	CRRC1600

Role	Permission Lists
	CRRC1610
	CRRC9000
	CRRC9010
	CRRC9020
	CRRC9500
	CRRF1000
	CRRF1100
	CRRF1200
	CRRF1210
	CRRF1220
	CRRF1230
	CRRF1300
	CRRF9000
	CRRF9010
	CRR11000
	CRR11100
	CRR19500
	CRR19510
	CRR19520
	CRR19530
	CRR19540
	CRR19550
	CRR19560
	CRR19580
	CRR19590
	CRR19600
CRR19610	
	CRRQ1000
	CRRQ1050
	CRRQ1100
	CRRQ1150
	CRRQ1200

Role	Permission Lists
	CRRS1000
	CRRS1100
	CRRS1110
	CRRS1200
	CRRS1210
	CRRS1220
	CRRS1300
	CRRS9000
	CRRS9010
	CRRS9020
	CRRS9500
	EPRB1000
	EPRB1100
	EPRB1200
	EPRB1300
	EPRB1400
	EPRB1500
	EPRF1000
	EPRF1010
	EPRF1020
	EPRF1030
	EPRF1040
	EPRF1050
	EPRF1060
	EPRF1070
	EPRF1080
	EPRF1090
	EPRF1100
	EPRF1110
	EPRF1120
	EPRF1130
	EPRF1140

<i>Role</i>	<i>Permission Lists</i>
	EPRF1150
	EPRF1160

Permission Lists by PeopleSoft CRM Call Center/HelpDesk/Support Role

<i>Role</i>	<i>Permission Lists</i>
Call Center Agent (PeopleSoft CRM Support)	CRRB1300
	CRRB1600
	CRRB1700
	CRRB9120
	CRRB9135
	CRRC1120
	CRRC1130
	CRRC1420
	CRRC1430
	CRRC9500
	CRRF1300
	CRR11000
	CRR19500
	CRR19530
	CRR19540
	CRR19550
	CRR19560
	CRR19580
	CRR19590
	CRR19610
	CRRS9500
	EPRB1000
	EPRB1200
	EPRB1300
	EPRB1400
Call Center Director	CRRB1300
	CRRB1600

Role	Permission Lists
	CRRB1700
	CRRB9135
	CRRC1110
	CRRC1120
	CRRC1130
	CRRC1420
	CRRC1430
	CRRC9500
	CRRF1300
	CRR1000
	CRR19500
	CRR19530
	CRR19540
	CRR19550
	CRR19560
	CRR19580
	CRR19590
	CRR19610
	CRRS9500
	EPRB1000
	EPRB1200
	EPRB1300
	EPRB1400
Call Center Manager	CRRB1300
	CRRB1400
	CRRB1420
	CRRB1600
	CRRB1605
	CRRB1610
	CRRB1630
	CRRB1700
	CRRB9120

Role	Permission Lists
	CRRB9125
	CRRB9130
	CRRB9135
	CRRC1110
	CRRC1120
	CRRC1130
	CRRC1420
	CRRC1430
	CRRC1480
	CRRC9500
	CRRF1300
	CRRI1000
	CRRI9500
	CRRI9530
	CRRI9540
	CRRI9550
	CRRI9560
	CRRI9580
	CRRI9590
	CRRI9610
	CRRS9500
	EPRB1000
	EPRB1200
	EPRB1300
	EPRB1400
Call Center Specialist	CRRB1300
	CRRB1600
	CRRB1700
	CRRB9120
	CRRB9125
	CRRB9130
	CRRB9135

Role	Permission Lists
	CRRC1120
	CRRC1130
	CRRC1420
	CRRC1430
	CRRC9500
	CRRF1300
	CRR11000
	CRR19500
	CRR19530
	CRR19540
	CRR19550
	CRR19560
	CRR19580
	CRR19590
	CRR19610
	CRRS9500
	EPRB1000
	EPRB1200
	EPRB1300
	EPRB1400
HelpDesk App Admin (PeopleSoft CRM HelpDesk application administrator)	CRRB1100
	CRRB1200
	CRRB1210
	CRRB1300
	CRRB1400
	CRRB1420
	CRRB1600
	CRRB1605
	CRRB1610
	CRRB1630
	CRRB1700

Role	Permission Lists
	CRRB9000
	CRRB9020
	CRRB9030
	CRRB9041
	CRRB9080
	CRRB9100
	CRRB9140
	CRRF1100
	CRRF1200
	CRRF1210
	CRRF1220
	CRRF1230
	CRRF9000
	CRRI9530
	CRRI9540
	CRRI9560
	CRRI9600
	CRRS9500
	EPRB1000
	EPRB1300
	EPRB1400
	EPRB1500
	EPRF1000
	EPRF1010
	EPRF1020
	EPRF1030
	EPRF1040
	EPRF1050
	EPRF1060
	EPRF1070
	EPRF1080
	EPRF1090

Role	Permission Lists
	EPRF1100
	EPRF1110
	EPRF1120
	EPRF1130
	EPRF1140
	EPRF1150
	EPRF1160
HelpDesk Agent	CRRB1400
	CRRB1420
	CRRB1600
	CRRB1700
	CRRB9120
	CRRB9135
	CRRC1130
	CRRC1400
	CRRC1430
	CRRI9540
	CRRS9500
HelpDesk Manager	CRRB1400
	CRRB1420
	CRRB1600
	CRRB1605
	CRRB1610
	CRRB1700
	CRRB9120
	CRRB9125
	CRRB9130
	CRRB9135
	CRRC1130
	CRRC1400
	CRRC1430
	CRRC1470

Role	Permission Lists
	CRRC9500
	CRR19540
	CRRS9500
Solution Manager	CRRB1300
	CRRB1600
	CRRB1700
	CRRB9030
	CRRB9135
	CRRC1120
	CRRC1550
	CRRC1560
	CRRC1570
	CRRF1300
	CRR19530
	CRR19560
	CRR19590
	CRRS9500
	EPRB1000
	EPRB1200
	EPRB1300
	EPRB1400
Support App Admin (support application administrator)	CRRB1000
	CRRB1010
	CRRB1300
	CRRB1400
	CRRB1420
	CRRB1600
	CRRB1605
	CRRB1610
	CRRB1630
	CRRB1700
	CRRB9000

Role	Permission Lists
	CRRB9020
	CRRB9045
	CRRB9100
	CRRB9120
	CRRB9125
	CRRB9130
	CRRB9135
	CRRC1120
	CRRC1130
	CRRC9000
	CRRC9020
	CRRF1000
	CRRF1300
	CRRF9010
	CRRI9520
	CRRI9530
	CRRI9540
	CRRI9560
	CRRI9580
	CRRI9590
	CRRS9500
	EPRB1000
	EPRB1200
	EPRB1400
	EPRB1500
Technical Specialist	CRRB1600
	CRRB1700
	CRRB9120
	CRRB9125
	CRRB9130
	CRRB9135
	CRRC1120

<i>Role</i>	<i>Permission Lists</i>
	CRRC1130
	CRRC1400
	CRRC1430
	CRRC9500
	CRR11000
	CRR19500
	CRR19550
	CRR19580
	CRRS9500

Permission Lists by PeopleSoft CRM Interaction Management Role

<i>Role</i>	<i>Permission Lists</i>
Universal Rep (PeopleSoft CRM interaction management)	CRRB1010
	CRRB1300
	CRRB1600
	CRRB1700
	CRRB9045
	CRRB9100
	CRRB9135
	CRRB9160
	CRRB9181
	CRRB9182
	CRRB9183
	CRRB9184
	CRRC1120
	CRRC1130
	CRRC1420
	CRRC1430
	CRRC9500
	CRRF1000
	CRRF1100
	CRRF1200

<i>Role</i>	<i>Permission Lists</i>
	CRRF1210
	CRRF1220
	CRRF1300
	CRR1000
	CRR19500
	CRR19510
	CRR19520
	CRR19530
	CRR19540
	CRR19550
	CRR19560
	CRR19580
	CRR19590
	CRR19600
	CRR19610
	CRRS1000
	CRRS9500
	EPRB1000
	EPRB1300
	EPRB1400
	EPRB1500

Permission Lists by PeopleSoft CRM FieldService Role

<i>Role</i>	<i>Permission Lists</i>
Development Engineer	CRRB1700
	CRR19540
	CRRQ1000
	CRRQ1050
	CRRQ1100
	CRRQ1150
Dispatcher	CRRB1300
	CRRB1700

Role	Permission Lists
	CRRF1100
	CRRF1200
	CRRF1210
	CRRF1220
	CRR19530
	CRR19540
	CRR19560
	CRR19600
	EPRB1000
	EPRB1300
	EPRB1400
	EPRF1000
	EPRF1010
	EPRF1020
	EPRF1070
	EPRF1120
	EPRF1130
Engineering Manager	CRRB1700
	CRR19540
	CRRQ1000
	CRRQ1050
	CRRQ1100
	CRRQ1150
FieldService Agent	CRRB1010
	CRRB1210
	CRRB1600
	CRRB1700
	CRRF1100
	CRRF1200
	CRRF1210
	CRRF1220
	CRR19540

Role	Permission Lists
	CRR19580
	CRR19600
	CRRS9500
	EPRB1000
	EPRB1300
	EPRB1400
	EPRF1000
	EPRF1070
	EPRF1120
	EPRF1130
FieldService App Admin (PeopleSoft CRM FieldService application administrator)	CRRB1100
	CRRB1200
	CRRB1210
	CRRB1300
	CRRB1400
	CRRB1420
	CRRB1600
	CRRB1605
	CRRB1610
	CRRB1630
	CRRB1700
	CRRB9000
	CRRB9020
	CRRB9030
	CRRB9041
	CRRB9080
	CRRB9100
	CRRB9140
	CRRF1100
	CRRF1200
	CRRF1210

Role	Permission Lists
	CRRF1220
	CRRF1230
	CRRF9000
	CRR19530
	CRR19540
	CRR19560
	CRR19600
	CRRS9500
	EPRB1000
	EPRB1300
	EPRB1400
	EPRB1500
	EPRF1000
	EPRF1010
	EPRF1020
	EPRF1030
	EPRF1040
	EPRF1050
	EPRF1060
	EPRF1070
	EPRF1080
	EPRF1090
	EPRF1100
	EPRF1110
	EPRF1120
	EPRF1130
	EPRF1140
	EPRF1150
	EPRF1160
FieldService Engineer	CRRB1010
	CRRB1210
	CRRB1300

Role	Permission Lists
	CRRB1600
	CRRB1700
	CRRF1100
	CRRF1200
	CRRF1210
	CRRF1220
	CRRI9530
	CRRI9540
	CRRI9560
	CRRI9580
	CRRI9600
	CRRS9500
	EPRB1000
	EPRB1300
	EPRB1400
FieldService Manager	CRRB1010
	CRRB1210
	CRRB1400
	CRRB1420
	CRRB1600
	CRRB1605
	CRRB1610
	CRRB1630
	CRRB1700
	CRRF1100
	CRRF1200
	CRRF1210
	CRRF1220
	CRRF1230
	CRRI9540
	CRRI9580
	CRRI9600

Role	Permission Lists
	CRRS9500
	EPRB1000
	EPRB1300
	EPRB1400
	EPRF1000
	EPRF1010
	EPRF1020
	EPRF1030
	EPRF1040
	EPRF1050
	EPRF1060
	EPRF1070
	EPRF1080
	EPRF1090
	EPRF1100
	EPRF1110
	EPRF1120
	EPRF1130
	EPRF1140
	EPRF1150
	EPRF1160
FieldService Partner	CRRB1010
	CRRB1210
	CRRB1400
	CRRB1420
	CRRB1600
	CRRB1605
	CRRB1610
	CRRB1630
	CRRB1700
	CRRF1100
	CRRF1200

Role	Permission Lists
	CRRF1210
	CRRF1220
	CRRF1230
	CRR19540
	CRR19580
	CRR19600
	CRRS9500
	EPRB1000
	EPRB1300
	EPRB1400
	EPRF1000
	EPRF1010
	EPRF1020
	EPRF1030
	EPRF1040
	EPRF1050
	EPRF1060
	EPRF1070
	EPRF1080
	EPRF1090
	EPRF1100
	EPRF1110
	EPRF1120
	EPRF1130
	EPRF1140
	EPRF1150
	EPRF1160
Inventory Agent	CRRB1010
	CRRB1210
	CRRB1400
	CRRB1420
	CRRB1600

Role	Permission Lists
	CRRB1605
	CRRB1610
	CRRB1630
	CRRB1700
	CRRF1100
	CRRF1200
	CRRF1210
	CRRF1220
	CRRF1230
	CRR19540
	CRR19580
	CRR19600
	CRRS9500
	EPRB1000
	EPRB1300
	EPRB1400
	EPRF1000
	EPRF1010
	EPRF1020
	EPRF1030
	EPRF1040
	EPRF1050
	EPRF1060
	EPRF1070
	EPRF1080
	EPRF1090
	EPRF1100
	EPRF1110
	EPRF1120
	EPRF1130
	EPRF1140
	EPRF1150

Role	Permission Lists
	EPRF1160
Inventory Manager	CRRB1100
	CRRB1200
	CRRB1210
	CRRB1700
	CRRF1300
	CRR19540
	CRR19590
	EPRF1000
	EPRF1010
	EPRF1020
	EPRF1030
	EPRF1040
	EPRF1050
	EPRF1060
	EPRF1070
	EPRF1080
	EPRF1090
	EPRF1100
	EPRF1110
	EPRF1120
	EPRF1130
	EPRF1140
	EPRF1150
	EPRF1160
Product Manager	CRRB1000
	CRRB1010
	CRR19580
	CRRS1200
	CRRS1210
	CRRS1220
Purchasing Agent	CRRB1100

Role	Permission Lists
	CRRB1200
	CRRB1210
	EPRF1000
	EPRF1020
	EPRF1030
	EPRF1070
	EPRF1100
	EPRF1120
	EPRF1130
Receiving Agent	CRRB1700
	CRRF1300
	CRR19540
	CRR19590
	EPRF1000
	EPRF1010
	EPRF1020
	EPRF1030
	EPRF1080
	EPRF1090
	EPRF1100
	EPRF1120
	EPRF1130
	EPRF1160
Technical Support	CRRB1700
	CRRB9130
	CRRB9135
	CRRC1120
	CRRC1130
	CRRC1400
	CRRC1420
	CRRC1430
	CRRC1470

<i>Role</i>	<i>Permission Lists</i>
	CRRC1480
	CRRC1550
	CRRC1560
	CRRC1570
	EPRB1000
	EPRB1300
	EPRB1400
	EPRF1000
	EPRF1020
	EPRF1070

Permission Lists by PeopleSoft CRM Sales Role

<i>Role</i>	<i>Permission Lists</i>
Inside Sales Rep (inside sales representative)	CRRB1300
	CRRB1600
	CRRB1700
	CRRI9510
	CRRI9530
	CRRI9540
	CRRI9560
	CRRS1000
	CRRS1100
	CRRS1110
	CRRS1220
	CRRS9020
	CRRS9500
	EPRB1000
	EPRB1100
	EPRB1300
	EPRB1400
Field Sales Representative (field sales representative)	CRRB1300
	CRRB1600

Role	Permission Lists
	CRRB1700
	CRR19510
	CRR19530
	CRR19540
	CRR19560
	CRRS1000
	CRRS1100
	CRRS1110
	CRRS1220
	CRRS9020
	CRRS9500
	EPRB1000
	EPRB1100
	EPRB1300
	EPRB1400
Sales Manager	CRRB1300
	CRRB1600
	CRRB1605
	CRRB1700
	CRR19510
	CRR19530
	CRR19540
	CRR19560
	CRRS1000
	CRRS1100
	CRRS1110
	CRRS1200
	CRRS1210
	CRRS1220
	CRRS9010
	CRRS9020
	CRRS9500

Role	Permission Lists
	EPRB1000
	EPRB1100
	EPRB1300
	EPRB1400
Sales App Admin (sales application administrator)	CRRB1000
	CRRB1010
	CRRB1300
	CRRB1420
	CRRB1600
	CRRB1605
	CRRB1700
	CRRB9020
	CRRB9044
	CRRB9120
	CRRB9125
	CRRB9130
	CRRB9135
	CRRB9160
	CRRB9510
	CRRB9530
	CRRB9540
	CRRB9560
	CRRB9580
	CRRS1000
	CRRS1100
	CRRS1110
	CRRS1200
	CRRS1210
	CRRS1220
	CRRS1300
	CRRS9000
	CRRS9010

Role	Permission Lists
	CRRS9020
	CRRS9500
	EPRB1000
	EPRB1100
	EPRB1300
	EPRB1400

Permissions Granted to the Controller Role

The menus and components available to the controller include all the components available to the accounting manager and general ledger administrator roles combined.

Security Options Page

Usage	Use the Security Options page to select security options that are implemented system-wide and used to set up your security views. This page enables you to select the type of security you plan to implement—by user or by role—and the key fields you want to secure. Unlike most of the pages used to set up the system, this page is not keyed by SetID or Business Unit.
Object Name	SECURITY_OPTIONS
Navigation	Define Business Rules, Administer Security, Use, Security Options

Security Options page (CRM)

Type of Security Region

Select the **Type of Security** that you intend to implement.

No Security	Disables PeopleSoft application security. All users who are authorized to access a page may select any valid setID or business unit when they enter an application page. We deliver PeopleSoft CRM applications with security disabled.
User ID Level Security	Enables PeopleSoft application security by user ID. Users are limited to accessing application pages or prompt values using the setIDs and business units specified by their user IDs.
Permission List Level Security	Enables PeopleSoft application security by permission list. Users are limited to the key fields specified by the permissions to which their user IDs are assigned.

Secured Fields

PeopleSoft application row-level security can be based on different key fields and objects that are used throughout your system. On the Installation - Security Options page, you can elect to implement security on any of the following fields by selecting the appropriate check boxes.

Business Unit	Business Unit is the primary key for all transaction data.
SetID	SetID is the primary key for all accounting structure and rules tables.

Apply Security Page

Usage	Use the Apply Security page to run the process that puts your selected security options into effect.
Object Name	RUN_RB9001
Navigation	Define Business Rules, Administer Security, Process, Apply Security Setups
Access Requirements	Enter a Run Control ID.

Apply Security

Run Control ID: REORG10006
[Report Manager](#)
[Process Monitor](#)

Language: English

Apply Security page (CRM)

Specify the default **Language** of your database and run this process in the Process Scheduler.

For more information about entering run controls and using the Process Scheduler, see Process Scheduler Basics.

Report Request Parameters

No parameters required

The Apply Security Setups process uses the parameters you specified on the Security Options page and makes the appropriate changes throughout the system.

Setting Up Row-Level Security Views

Business units and SetIDs are maintained in *edit tables* and can be used as primary keys throughout your system. When a field uses an edit table to select values, you are limited to selecting only the values that have already been defined for that edit table. PeopleSoft row-level, application security, when activated, enables you to specify values from the edit table, so that only those values are available in a particular view.

Think of views as a means to access data horizontally across more than one table. *Views* are SQL statements that filter out data rows whose key values are not needed as valid access parameters. The result is that users who are authorized to access SetIDs, business units, or ledgers will see only a subset of the values from these edit tables.

Once these views are set up, you can then specify which users or roles can access the pages that contain secured field values. Within each page, you can also hide specific fields from particular role.

Security View Names

PeopleSoft applications are delivered with security views that apply to key fields in your system. You can alter these views or build views of your own. View names have one of three view name suffixes to reflect the type of security for the view.

NONVW

Indicates that no security is chosen for that view.

OPRVW

Indicates that user security is chosen for that view.

CLSVW

Indicates that permission list security is chosen for that view.

Security Views Page

Usage	Use the Security Views page to define the type of security for each view of your system. The Apply Security Setups process changes the security view names to match the levels of security for each view. These names use the file extensions that reflect the corresponding security type.
Object Name	SECURITY_VIEWS
Navigation	Define Business Rules, Administer Security, Use, Security View Names
Access Requirements	None.

Security Views					
Search Text	No Security View	User ID Security View	Permission List Security View	Type	
SP_BURF	SP_BURFDS_NONWW	SP_BURFDS_OPRWW	SP_BURFDS_CLSWW	Unit	+ -
SP_BU_RCL	SP_BU_RCLNONWW	SP_BU_RCLOPRWW	SP_BU_RCLCLSWW	Unit	+ -
SP_BU_RC_	SP_BU_RC_NONWW	SP_BU_RC_OPRWW	SP_BU_RC_CLSWW	Unit	+ -
SP_BU_RF_	SP_BU_RF_NONWW	SP_BU_RF_OPRWW	SP_BU_RF_CLSWW	Unit	+ -
SP_BU_RSFL	SP_BU_RSFLNONWW	SP_BU_RSFLOPRWW	SP_BU_RSFLCLSWW	Unit	+ -
SP_BU_RSF_	SP_BU_RSF_NONWW	SP_BU_RSF_OPRWW	SP_BU_RSF_CLSWW	Unit	+ -
SP_RC_VRL	SP_RC_VRLNONWW	SP_RC_VRLOPRWW	SP_RC_VRLCLSWW	Unit	+ -
SP_RC_VR_	SP_RC_VR_NONWW	SP_RC_VR_OPRWW	SP_RC_VR_CLSWW	Unit	+ -
SP_SETID_	SP_SETID_NONWW	SP_SETID_OPRWW	SP_SETID_CLSWW	SetID	+ -

Security Views page

The **Search Text** column lists the view name prefixes supplied by each of your applications. When you run the Apply Security Setups process, this column is used to search the system for view names that begin with these prefixes. If a view name begins with a prefix from this list, the process changes the view name extension to match the security type you selected when you specified your security options.

Select the **Type** of field—*Analysis, Book, Ledger, Pay Cycle, Project, Set ID*, or *Unit*—that is secured by each view. The system stores the list in the SEC_VIEW_NAMES table, where you can review or update this information. You can also configure new security views for your system on this page.

Defining Row-Level Security for Users

After you select your security options and set up security view names, you're ready to define the actual secured field values used by each user or permission list. When you secure key fields in your application, the page you use depends on which level of system security you select. If you select user-level security, you utilize User security pages. If you select role-level security, you use the permission list security pages.

Business Unit Security Pages

You can grant access to a business unit using permission lists or user IDs. The pages used to define security using permission lists or user IDs work the same way.

BU by Perm List Page

Usage	Use the BU by Perm List (business unit by permission list) page to grant access to a business unit using a permission list.
Object Name	SEC_BU_CLS
Navigation	Define Business Rules, Administer Security, Use, Unit Security by Perm List

Access Requirements	Enter a Primary Permission List.
---------------------	----------------------------------

BU by Perm List (business unit by permission list) page

For each **Permission List**, select the **Accessible Business Units**.

Business Unit by User ID Page

Usage	Use the BU by User ID page to grant access to a business unit using a user ID.
Object Name	SEC_BU_OPR
Navigation	Define Business Rules, Administer Security, Use, Unit Security by User ID
Access Requirements	Enter a User ID

BU by User ID (Business Unit by User ID) page

For each **User ID**, select the **Accessible Business Units**.

TableSet Security Pages

You can grant access to a TableSet using permission lists or user IDs. The pages used to define security using permission lists or user IDs work the same way.

SetID by Perm List Page

Usage	Use the SetID by Perm List (setID by permission list) page to grant access to a TableSet using a permission list.
Object Name	SEC_SETID_CLS
Navigation	Define Business Rules, Administer Security, Use, TableSet Security by Perm List
Access Requirements	Enter a Primary Permission List.

SetID by Perm List (setID by permission list) page

For each **Primary Permission List**, select the **SetID** or **SetIDs** that can be accessed.

SetID by User ID Page

Usage	Use the SetID by User ID page to grant access to a TableSet using a user ID.
Object Name	SEC_SETID_OPR
Navigation	Define Business Rules, Administer Security, Use, TableSet Security by User ID
Access Requirements	Enter a User ID.

Set ID by User ID page

For each **User ID**, select the **SetID** or **SetIDs** that can be accessed.

CHAPTER 8

Maintaining Currencies and Market Rates

The uniquely flexible PeopleSoft structure enables you to manage financial information in multiple currencies. PeopleSoft applications support the European Common Currency (euro) as well as currency conversions and market rates.

Maintaining Currency Tables

The currency code pages define each currency that you use. To meet the needs of your multicurrency business, PeopleSoft supports the euro and delivers the Currency Code table with many common currencies identified by the ISO standard.

Note. The Currency Code table supports the ISO standard of zero, two, and three decimal positions. All currency-sensitive amount fields are 23 integers and three decimals (23.3), except for some working fields.

Currency Code Page

Usage	Use the Currency Code page to add or update a currency code.
Object Name	CURRENCY_CD_TABLE
Navigation	Define Business Rules, Define General Options, Use A-D, Currency Code
Access Requirements	Enter a currency code.

Currency Code

Currency Code: EUR

Definition Find | View All First 1 of 1 Last

'Effective Date: 01/01/1900 'Status: Active + -

'Description: euro

Short Description: euro

Currency Symbol:

Country:

Decimal Positions: 2

Scale Positions:

Currency Code page

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

Effective Date	Date on which a table row becomes effective; the date that an action begins.
Status	Select <i>Active</i> or <i>Inactive</i> .
Description	Freeflow text of up to 36 characters that describes the currency type.
Short Description	Freeflow text of up to 15 characters.
Currency Symbol	Although PeopleSoft delivers many currencies with a currency symbol—such as \$ for Australian dollar or L for Italian lira—you have the option to enter new symbols for various delivered currencies or for currencies that you add.
Country	Country code for the currency.
Decimal Positions	The number of decimal positions that appear in the notation for the currency. For example, there are two decimal positions for Australian dollars (\$5.00), but no decimal positions for Italian lira (500 L).
Scale Positions	The scale positions that you want to round to for this currency. The scale position controls how many numbers to the left of the decimal are displayed. The data is actually stored with full precision in the database itself. For example, if you want all million-dollar amounts displayed as the number of millions without the zeros, enter 6 as the scale position. In this case, 24,000,000 appears as 24, but it is stored in the database as 24,000,000.

Note. PeopleSoft delivers fully populated country and state/province code tables. To view country codes, select **Define General Options, Use A-D, Country**. To view state/province codes, select **Define General Options, Use R-Z, State**. PeopleSoft updates these tables as national boundaries and designations change.

PeopleSoft supports direct and indirect rate quotation, quote units, and triangulation. These options provide you with flexible tools to convert and manage your multicurrency operations.

The currency quotation method controls how a stored rate is displayed and how an entered rate is interpreted and stored in the database. Use the Currency Quotation Method page to set up and maintain a currency quotation method for each *from* currency/*to* currency pair.

Define your currency quotation options *before* the rates have been entered and *before* you calculate the rates.

For currency pairs that triangulate, you do not typically maintain rates online. Instead, the Cross Rate/Triangulation Generation SQR uses the rates between the *from* currency and the reference currency, and the reference currency and the *to* currency to determine the cross rate.

The currency quotation methods must be set up correctly to yield the correct results for triangulation.

Two fields store the rate conversion factor: RATE_DIV and RATE_MULT. With these in mind, the currency conversion formula is always

$(\text{From currency} \div \text{RATE_DIV}) \times \text{RATE_MULT} = \text{To currency}.$

Currency Quotation Method Page

Usage	Use the Currency Quotation Method page to set up and maintain a currency quotation method for each <i>from</i> currency/ <i>to</i> currency pair.
Object Name	CURR_QUOTE_PNL
Navigation	Define Business Rules, Define General Options, Use A-D, Currency Quotation Method
Access Requirements	Enter a valid from currency code and to currency code.

Currency Quotation Method

From Currency Code: USD US Dollar
To Currency Code: FRF French Franc

Quote Method Find | View All First 1 of 1 Last

Effective Date: 04/21/2001 Status: Active +

Rate Quotation Basis

☒ Direct ☐ Indirect Quote Units: 1 ☒ Auto Reciprocate

Triangulation Options

☒ Triangulate
Reference Currency: EUR
euro
USD x.xxxx = EUR 1 = FRF y.yyyy

Primary Visual Rate

☒ USD --> FRF
☐ USD --> EUR
☐ EUR --> FRF

Cross-Rate

☐ Allow Override

Recalculate

☒ USD --> EUR
☐ EUR --> FRF

Currency Quotation Method page

The system displays the **From Currency Code** and **To Currency Code** that you entered to access the page.

Quote Method

Use the **Quote Method** group box to enter information regarding the quotation method.

Effective Date Date that the row in the table becomes effective.

Status Indicates whether a row in a table is *Active* or *Inactive*.

Rate Quotation Basis

In the **Rate Quotation Basis** group box, determine whether you want the rates for a currency pair quoted directly or indirectly.

Direct Select this option if you want direct quotes for currency pairs. For example, for a conversion of U.S. dollars to French francs, a direct quote would indicate that 1 USD = x.xxxx FRF.

Note. Currency pairs that triangulate must still be classified as either direct or indirect for use in displaying the calculated cross rate.

Indirect Select this option if you want indirect quotes for currency pairs. For example, for a conversion of U.S. dollars to French francs, an indirect quote would indicate that x.xxxx USD = 1 FRF.

Note. Currency pairs that triangulate must still be classified as either direct or indirect for use in displaying the calculated cross rate.

Quote Units

Enter any value in this field, although quote units generally have a scale of 10 (such as 10, 100, 1000). The default value for this field is *1*.

Quote units, sometimes called scaling factors, are used to preserve decimal position. For example, the exchange rate between ITL and FRF may be stated as 1000 ITL = 3.407823 FRF instead of 1 ITL = 0.00340782 FRF. The use of quote units is common business practice in several European countries.

Auto Reciprocate

Select this check box to have the system automatically create or update the rate for the reciprocal currency pair whenever an exchange rate is added or updated. For example, when you enter a new USD to GBP rate, the GBP to USD rate will be updated automatically. You can only automatically reciprocate currency pairs for which quotation methods have been established. The check box is selected by default.

Triangulation Options

Use the **Triangulation Options** group box to set up triangulation between currencies.

Triangulate

Select this check box to have the system convert two currencies through a third currency (the reference currency).

Reference Currency

The currency through which the *from* currency will be converted. For example, when the system converts between French francs and U.S. dollars, the reference currency would be the euro.

Primary Visual Rate

Select which of these three rates is the *primary rate*—the one that will appear on primary pages and reports.

Allow Override

Select this check box to enable users to override the cross rate for a triangulated currency pair. If this check box is clear, users can only change the components of the triangulated rate. If you select this check box, you must specify which currency pair the system should use to recalculate to keep the triangulation accurate.

Recalculate

Select the method for recalculation.

Triangulation

Triangulation is used in hyperinflationary environments in which all conversions to the local currency are done through a stronger, more stable currency, such as the U.S. dollar. It is also used to convert a currency that participates in the euro. With the introduction of the euro, all participating currencies are quoted directly against the euro.

The following examples clarify indirect quotation, direct quotation with quote units, and triangulation:

- 100 USD to GBP (indirect) = $(100 \text{ USD} / 1.6) \times 1 = 62.50 \text{ GBP}$
- 1000 CHF to DEM (direct with units) = $(1000 \text{ CHF} / 100) \times 119.335 = 1193.35 \text{ DEM}$
- 100 USD to FRF (triangulate) = $(100 \text{ USD} / 1.25) \times 6.8 = 544 \text{ FRF}$

For more information about quote methods and triangulation, see the section on calculating currency rates in your *PeopleSoft Application Fundamentals for FSCM PeopleBook*. .

For example, to convert from USD to FRF, you need to do a two-step conversion. First, convert the USD amount to the reference currency using the appropriate triangulated rate (which uses the USD to EUR component of the USD to FRF triangulated rate stored in RATE_DIV). Then convert the reference currency to FRF using the fixed exchange rate (which uses the EUR to FRF component of the USD to FRF triangulated rate stored in RATE_MULT).

Typically, you would not maintain these rates directly. Instead, you would process them and all rates through the Cross/Reciprocal Rate Calculator page.

With triangulated currency pairs, there are three exchange rates to consider:

- The rate between the *from* and reference currencies.
- The rate between the reference and *to* currencies.
- The cross rate between the *from* and *to* currencies.

The options in the **Primary Visual Rate** group box enable you to select which of these three rates will appear on primary pages and reports.

Automatic Reciprocation of Quote Methods

The Currency Quotation Method page automatically reciprocates itself. For example, if you define the conversion of USD to GBP as indirect, this record is automatically created to indicate a quote method of direct. If you change the quote method on the GBP to USD record, the USD to GBP record is automatically updated.

The following table shows each possible value with its reciprocal value.

Page Element	Value (for USD to FRF)	Reciprocal Value (for FRF to USD)
Rate Quotation Basis	Direct	Indirect
	Indirect	Direct
Quote Units	Any valid value	Same value
Rate Decimal Positions	4 (default value)	Same value
Auto Reciprocate	Yes	Yes
	No	No

Triangulate	Yes	Yes
	No	No
Reference Currency	Any valid value	Same value
Primary Visual Rate	From - To (USD - FRF) From - Reference (USD - EUR) Reference - To (EUR - FRF)	From - To (FRF - USD) Reference - To (EUR - USD) From - Reference (FRF - EUR)
Cross-Rate Allow Override	Yes No	Yes No
Cross-Rate Recalculate	From - Reference (USD - EUR) Reference - To (EUR - FRF)	Reference - To (EUR - USD) From - Reference (FRF - EUR)

Calculating Currency Rates

PeopleSoft applications come with two tools for calculating currencies:

- The Currency Exchange Calculator

The Currency Exchange Calculator quickly performs currency conversion using the exchange rates stored on the market rates table.

- The Cross/Reciprocal Rate Calculator

The Cross/Reciprocal Rate Calculator calculates exchange rates and updates the market rates table. It performs three functions, generating:

- Cross-rates for nontriangulated currency pairs.

For example, suppose that a company subscribes to a rate service that provides all rates respective to the USD. So, starting with a US dollar to Canadian dollar rate and a US dollar to Mexican peso rate, the system can calculate a new Canadian dollar to Mexican peso cross-rate.

- Triangulated rates for triangulated currency pairs.

For example, suppose that the euro to French franc fixed rate has been established on the market rate table and a new euro to USD rate has just been entered. Using this information, the process can create a new USD to French franc triangulated rate. (Note that the difference between triangulation and cross-rate entails how the data is stored on the database. With cross-rate, a new rate is actually calculated. With triangulation, the individual components of the source rates are stored on the target.)

- Reciprocal rates for those currency pairs that are not automatically reciprocated.

For example, with a USD to CAD rate as the source, the process can calculate the

CAD to USD reciprocal. (Note that if quote methods are in place, then the visual rate remains the same and the difference is in how the data is stored on the database (RATE_MULT and RATE_DIV are inverse). But if quote methods aren't used, then the process actually calculates an inverse rate, and the visual rates will differ.)

Parameters Page

Usage	Use the Parameters page to create a report that calculates cross-reciprocal rates.
Object Name	RUN_EO9030
Navigation	Define Business Rules, Define General Options, Process, Cross/Reciprocal Rate Calc
Access Requirements	Enter a run control ID.

Parameters

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

Language: English

Report Request Parameters

Market Rate Index: MODEL Default

Term: 0

From Common Currency:

Exchange Rate Type:

As of Date: Leave blank to use Current Date

☒ Generate Report
☐ Override Existing Rates
☒ Generate Reciprocal Rate
☐ Generate Cross Rates
☒ Quote Method Required
☐ Rate Triangulate

Parameters page

The system displays the **Run Control ID** that you entered to access the page.

Language The language for translation.

Report Request Parameters

Use this group box to set parameters for the report.

Market Rate Index The index for the exchange rate.

Term The term expressed in days

From Common Currency The currency that you are converting from.

Exchange Rate Type The currency rate type for the exchange.

As of Date	The effective date of the newly created exchange rates (the output of the process). The as of date also determines the rates used as the basis for the calculations (the input to the process). The report uses the most current currency quotation method for the currency pair as the input to the process. If the as of date is the current effective rate as of the specified date, it can affect triangulation. A USD to FRF triangulated rate effective April 1, 2000, might be composed of the EUR to USD rate also effective April 1, 2000, and the fixed EUR to FRF rate effective January 1, 1999.
Generate Report	Select the check box to generate a report that displays the exchange rates and reciprocal and cross-reciprocal calculations.
Override Existing Rates	Select the check box if you want the calculated rate to override rate for the exchange rate type (regardless of the as of date).
Generate Reciprocal Rate	Select the check box to have the system generate the reciprocal rate. The check box makes the system automatically calculate reciprocal rates for currency pairs that do not have the auto-reciprocate option on the currency method enabled.
Generate Cross Rates	Select the check box to have the system automatically generate cross rates. For example, for cross-currency rates between dollars, Canadian dollars (CAD), and Mexican pesos (MXP), enter USD to CAD = 1.473 and USD to MXP = 9.8793. The system automatically generates CAD to MXP = $9.8793/1.473 = 6.7069246$.
From Cur (from currency)	If you choose to generate cross rates, you must select a from currency. You can enter a wild card of % in this field to indicate from all currencies.
To Cur (to currency)	If you choose to generate cross rates, you must select a to currency. You can enter a wild card of % in this field to indicate to all currencies.
Quote Method Required	Select the check box if you want to generate a cross rate only if there is an existing quote method for the from/to currency pair.
Rate Triangulate	Select the check box to have the system convert two currencies through a third currency. If you select rate triangulation, you must select a from currency and a to currency. You can enter a wild card of % in either field or both fields to indicate from all or to all currencies.

Process Scheduler

Report Manager

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

Process Monitor

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

Run

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

For more information about the Report List page, the Process List page and Process Scheduler, see *Process Scheduler for the End User*.

For more information about currency exchange rates, see *PeopleSoft Application Fundamentals for FSCM PeopleBook*.

Currency Exchange Calculator Page

Usage	Use the Currency Exchange Calculator page to calculate the currency exchange between currencies rapidly. This tool enables you to select a rate type other than the base currency, but does not allow you to override the exchange rate.
Object Name	CURRENCY_EXCHNG_PN
Navigation	Define Business Rules, Define General Options, Use A-D, Currency Exchange Calculator
Access Requirements	None

Currency Exchange Calculator

'From Amount: 1.000

'From Currency Code: [dropdown]

'To Currency Code: USD [dropdown]

'Exchange Rate Type: OFFIC [dropdown]

'Effective Date: 03/20/2001 [calendar]

Converted Amount: 0.00

Currency Exchange Calculator page

From Amount

The currency exchange is based on the amount that you enter. The current exchange rate is set up on the Market Rates page.

From Currency Code	The currency that you are exchanging from.
To Currency Code	The currency that you are exchanging to.
Exchange Rate Type	The exchange rate type.
Effective Date	Date on which a table row becomes effective; the date that an action begins.
Converted Amount	The system automatically calculates the amount in this field when you save the page.

Establishing Market Rates

The PeopleSoft approach to market rates and currency conversion has been largely driven by the need to accommodate business practices related to the euro. In addition to currency exchange rates, PeopleSoft supports the many different types of market rates used in your global business such as interest rates, stock exchange indexes, and economic indicators. For each type of rate, you can capture data from many different sources. For example, you can download exchange rates from Reuters, the Federal Reserve, the Wall Street Journal, and so on.

To support these enterprise-wide requirements related to currency conversion, PeopleSoft provides a common repository for all types of market rate data and the option to enter and maintain rates manually.

Market Rate Index Page

Usage	Use the Market Rate Index page to describe the indexes for which you want to track rates. Among the typical market rate indexes are London interbank offered rate (Libor), Bloomberg foreign exchange, and Reuters foreign exchange. An index categorizes the various market rates that you track.
Object Name	RT_INDEX_TBL
Navigation	Define Business Rules, Define General Options, Use E-Q, Market Rate Index
Access Requirements	Enter the name of a market rate index.

Market Rate Index page

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

Rate Category

Select a rate category from the drop-down list box:
Commodity Price, Economic Indicator, Exchange Rate, Future Price, Interest Rate, Other, Stock Exchange Index, or Stock Price.

Default Exchange Rate Index

If you are entering exchange rate indexes, select this check box to indicate which index should be used to retrieve currency exchange rates. You can specify only one index code as the default.

Description

Freeform text of up to 30 characters to describe the index.

Rate Type Page

Usage	Use the Rate Type page to define rate types. These rate types further categorize market rates. Typical rate types are commercial, floating, average, and historical.
Object Name	RT_TYPE_TBL
Navigation	Define Business Rules, Define General Options, Use E-Q, Market Rate Type
Access Requirements	Enter a market rate type.

Rate Type page

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

Description

Freeform text to describe the rate type.

Short Description

Freeform text of up to 15 characters.

Rate Definition Page

Usage	Use the Rate Definition page to define tolerance limits for rates and to determine what action should occur if a new rate falls outside the set tolerance limit. The fields on this page will differ according to the rate category of the market rate index.
Object Name	RT_RATE_DEF_TBL
Navigation	Define Business Rules, Define General Options, Use E-Q, Market Rate Definition
Access Requirements	Enter the name of a market rate index.

The screenshot shows the 'Rate Definition' page. At the top, there's a tab labeled 'Rate Definition'. Below it, the 'Index' is set to 'MODEL' and 'ME'. The 'Rate Category' is 'Exchange Rate'. A search field for 'From Currency Code' is present. Below this is a table with columns: 'Term', 'From Currency', 'To Currency', 'Maximum Variance', and 'Error Type'. The first row has 'Term' as '0', 'From Currency' as a search field, 'To Currency' as a search field, 'Maximum Variance' as '2.50', and 'Error Type' as 'Warning'. There are '+' and '-' buttons to the right of the table. At the top right of the table, there are links for 'Find', 'View All', 'First', '1 of 1', and 'Last'.

Rate Definition page

The system displays the market rate **Index** that you entered to access the page and its associated **Rate Category**.

From Currency Code

The currency code for this rate.

Term

Enter the term (expressed in days). A term of **0** indicates a spot rate. Only PeopleSoft Treasury uses nonzero terms; all other applications must use a term of **0**.

From Currency

The currency to start with in the exchange.

To Currency

The currency to end with in the exchange.

Maximum Variance

Indicate the percentage of variance allowed when the user maintains the market rate. The system displays an error message if the change exceeds the tolerance. The default value is **2.50** (2.5%).

Error Type

Enter the type of error processing that will occur if the maximum variance is exceeded. Select one of the following values:

None: No error processing occurs; the new rate is used, even though it exceeds the limit.

Stop: Processing stops; the system prevents you from saving the new rate.

Warning: Default value. A warning appears; you can ignore it and save the new rate.

Note. The information that you see on this page depends on the type of index that you select. For example, if you select an index with interest rates, you will see interest rates on this page.

Market rate definitions specify the valid term, currency, and other appropriate field combinations for market rates. For example, if you have a market rate definition for an exchange rate with a **Term** of **30**, a **From Currency** of **FRF**, and a **To Currency** of **USD**, you can enter a rate using this combination in the market rate table. If you don't have a market rate definition, the system will create one for you using the default values. Enter the appropriate **From Currency** and **To Currency**. These values are used for exchange rate pairs. When you use triangulation, you need to include a definition for each of the currency pairs involved in the triangulation.

Note. If you decide to refresh the page using a new from currency, a message reminds you that transactions not saved will be lost. To refresh without saving your changes, click OK. To save your changes and then refresh the page, click Cancel to close the message, and then click Save.

Market Rates Page

Usage	Use the Market Rates page and its related pages to enter and maintain market rates. The rates are effective-dated, enabling you to track them as they change over time.
Object Name	RT_RATE_PNL
Navigation	Define Business Rules, Define General Options, Use E-Q, Market Rates
Access Requirements	Enter a market rate index.

Market Rates

Index: MODEL ME [Rate Definition](#)

Rate Category: Exchange Rate

Rate Type: HIST Historical rate

Term: 0

From Currency Code: FRF French Franc

To Currency Code: EUR euro

Rate Find | View All First 1 of 1 Last

Effective Date: 03/20/2001

Rate:

+ -

Market Rates page

The system displays the **Index**, **Rate Category**, **Rate Type**, **Term**, **From Currency Code**, and **To Currency Code** that you entered to access the page.

Rate Definition

Click this link to access the Market Rates - Rate Definition page where you can view or change rate definitions.

Effective Date

Date on which a table row becomes effective; the date that an action begins

Rate

The visual rate or, in the case of triangulated exchange rates, the primary visual rate.

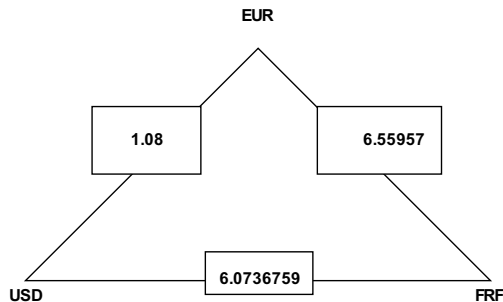


Click this button to access the Exchange Rate Detail page, where you can view the exchange rate.

The **Rate** field displays the *visual rate* or, in the case of triangulated exchange rates, the *primary visual rate*, which is typically the cross rate, but which can also be one of the other component rates of the triangle. You can edit the rate for nontriangulated rates and also for triangulated rates if a quotation method has been defined for the currency pair and the Cross-Rate Allow Override check box is selected on the Currency Quotation Method page. If an override is not allowed, users can update the exchange rate values to and from the reference currency on the Exchange Rate Detail page.

Note. If you change a triangulated cross rate, one of the component rates will be recalculated. This can result in the cross rate being recalculated slightly differently from the one that you entered. For example, suppose that you start with a triangulated rate of RM = 6.80000000 and RD = 1.25000000 for a cross rate of 5.44000000. If you change the cross rate to 5.43550000, the processing will first recalculate RD = 1.25103486, which, in turn, will recalculate the cross rate to 5.43550001. In rate maintenance, you have no choice but to accept the recalculation. In an application, however, such as journal entry, the system displays a warning message enabling you to override triangulation and to use the exact rate entered (in which case the rate would be stored as RM = 5.43550000 and RD = 1).

The following exhibit represents the three component visual rates in an exchange rate from USD to FRF, triangulating through the euro. You can access all three visual rates of a triangulated exchange rate by clicking the button next to the **Rate** field to access the Exchange Rate Detail page.



Sample component visual rates

You can edit the value in the **Rate** field *unless* all of the following conditions are true:

- The rate is triangulated.
- The primary visual rate is the cross rate.
- The Allow Override check box on the Currency Quotation Method page is cleared for the exchange rate's quotation method.

Note. Typically, you will not maintain triangulated exchange rates online. Instead, you'll maintain the rates of the *from* currency to the *reference* currency and the *reference* currency to the *to* currency, then run the Cross-Rate Reciprocal SQR (EO9030.SQR) to define the triangulated exchange rates.

For more information about maintaining triangulated exchange rates, see Parameters Page

If a quotation method has been defined for the currency pair and if the Auto Reciprocate check box for quotation method is selected (on the Currency Quotation Method page), then creating or maintaining a rate for a currency pair automatically creates or updates the rate of the reciprocal currency pair. For example, if you change the USD to GBP rate, the GBP to USD rate is automatically updated. You can automatically reciprocate only currency pairs for which quotation methods have been defined.

If a rate definition does not already exist for the currency pair, the system automatically creates one with the default value of **2.5%** maximum variance and processes a warning message.

Market Rates - Rate Definition Page

Usage	Use the Market Rates - Rate Definition page to view or change rate definitions.
-------	---

Object Name	RT_RATE_DEF_SEC
Navigation	Click the Rate Definition link on the Market Rates page.

Rate Definition				
Term	From Currency	To Currency	Maximum Variance	Error Type
0	USD	FRF	2.50	Warning

Market Rates - Rate Definition page

The the values for **Term**, **From Currency**, and **To Currency** are populated from the values on the Market Rates page.

Maximum Variance

The percentage of variance allowed when users maintain the market rate. If the change exceeds the tolerance, an error results. The default value is **2.50** (2.5%).

Error Type

The type of error that results when the tolerance defined in the **Maximum Variance** field is exceeded during data entry. The following are valid values:


None: No error processing occurs. The new rate is used even though it exceeds the limit.

Stop: Processing stops. The system prevents you from saving the new rate.

Warning: A warning appears. You can ignore it, and save the new rate.

Note. The results of changing the rate definition do not take effect until you save the Market Rates page.

Exchange Rate Detail Page

Usage	Use the Exchange Rate Detail page to display the rules used to calculate exchange rates. You can modify the rate values if necessary.
Object Name	EXCH_RT_DTL
Navigation	 Click the Exchange Rate Detail button on the Market Rates page.

Exchange Rate Detail		
Rate Quotation Basis:	Direct	
Quote Units:	1	
Triangulate:	Y	
Reference Currency:	EUR	
Current Quote:		
1.1527 USD = 1 EUR = 6.55957 FRF		
Historic Quote:		
Not Applicable		
Exchange Rate		
From	To	Rate
USD	FRF	6.55957000
USD	EUR	1.15270000
EUR	FRF	6.55957000

Exchange Rate Detail page

Rate Quotation Basis

Displays the quotation basis for the exchange rate as defined on the Currency Quotation Method page. If no quotation method is defined, the quotation basis is **Direct**.

Quote Units

Displays the quote units for the exchange rate as defined on the Currency Quotation Method page. If no quotation method is defined, the quote unit is **1**.

Triangulate

Displays the triangulated setting for the exchange rate as defined on the Currency Quotation Method page. If no quotation method is defined, the triangulated setting is **N**.

Reference Currency

Displays triangulated exchange rates only and displays the reference currency used in the triangulated exchange.

Current Quote

Displays the current exchange rate used to convert the *from* currency to the *to* currency. A direct, nontriangulated rate displays quote units (or 1) on the left side of the equal sign and the visual rate on the right. For example: 1 USD = 1.40000000 CAD.

Historic Quote

Displays a quote to indicate the quotation method originally used by a historic exchange rate, if the system determines that the quotation method originally used by the historic rate was different from the current quotation method. For example, the **Historic Quote** field displays a quote if the historic rate has converted the *from* currency to the *to* currency directly using a calculated reciprocal rate, but the current quotation method for the currency pair is now indirect. The field also displays a quote if the historic quote method was nontriangulated and the current quote method is triangulated. If the system does not determine that the historic and current quote methods are different, the **Historic Quote** field displays **Not Applicable**.

Exchange Rate

Displays a single visual rate for nontriangulated exchange rates or displays all three component visual rates for triangulated exchange rates. The cross rate for triangulated exchange rates is editable only if the Allow Override check box is selected in the exchange rate's quotation method definition (on the Currency Quotation Method page).

CHAPTER 9

Managing Workers

The personnel in your organization can have many roles and IDs that are associated with those roles. Use the Manage Workforce menu to track a person throughout PeopleSoft CRM according to their person ID. Both workers and contacts have person IDs and are tracked through the Person table.

In PeopleSoft CRM, a worker can be an employee of your company, a non-employee such as a contractor or a consultant, or a third-party worker providing services to your company. These people have a status of *Internal* in the Contact Flag field on the Personal Info (personal information) page. (The Person table is shared with the Customer Contact component to manage both internal and external contacts.)

Managing Personal Information

The Worker component enables you to track important information about your workers such as phone and address but also includes their job functions, departments, locations, employee information, as well as what inventory they might have in their storage locations, if they are field service technicians.

EIP Overview for the Worker Component

PeopleSoft provides several enterprise integration points (EIPs) that update the Worker component.

Page	<i>EIPs Used in PeopleSoft CRM and HRMS</i>	<i>Additional Information</i>
Worker Component: Personal Info, Personal Address/Phone/Email	PERSON_BASIC_FULLS YNC (Inbound only)	<p>This will purge worker (persons who are internal contacts) data out of the Person and Worker tables before applying the new data. The purge is performed only if a header message is received.</p> <p>For the following Worker attributes, only a subset of data is subscribed to:</p> <ul style="list-style-type: none">• For a worker's physical address, PeopleSoft CRM subscribes only to addresses with the address type <i>Mailing</i>.• For a worker's email address, PeopleSoft CRM subscribes only to email addresses with the email type <i>Business</i>.

Page	EIPs Used in PeopleSoft CRM and HRMS	Additional Information
		<ul style="list-style-type: none"> For a worker's phone number, PeopleSoft CRM subscribes only to phone numbers with the phone type <i>Business</i>, <i>Cellular</i>, <i>FAX</i>, <i>Pager 1</i>, <i>Pager 2</i>, and <i>Telex</i>.
Worker Component: Work	WORKFORCE_FULLSYNC (Inbound only)	<p>This will purge data out of the PeopleSoft HRMS Employee and Job tables in PeopleSoft CRM before applying the new data. The purge is performed only if a header message is received.</p> <p>PeopleSoft CRM subscribes only to the primary job information for the current effective row for the worker. All fields in the Worker component are updated from PeopleSoft HRMS with the exception of the Physical Location field.</p>
Worker Component: Personal Info, Personal Address/Phone/Email	PERSON_BASIC_SYNC (Inbound only)	You provide updates to PeopleSoft CRM by using the sync version of the Person Basic group of EIPs.
Worker Component: Work	WORKFORCE_SYNC (Inbound only)	You provide updates to PeopleSoft CRM by using the sync version of the Worker group of EIPs.

For more information about the PERSON_BASIC_SYNC and PERSON_BASIC_FULLSYNC EIPs, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook*.

Personal Info Page

Usage	Use the Personal Info (personal information) page to review and edit employee address data. You cannot use this page to add new employees. This must be done through your human resources system.
Object Name	RB_PERSON
Navigation	Manage Workforce, Manage Workforce, Use, Worker
Access Requirements	Enter a person ID.

Personal Info Personal Address/Phone/Email Work Function Storage Locations

Stu Marx Person ID: 0011

Name Info

Format for Country: USA United States

Name: Marx, Stu

Prefix:

First Name: Stu Middle Name:

Last Name: Marx Suffix:

Salutation Code:

Contact Flag: Internal Preferred Communication: Call

Language Code: English EmplID:

ID's defined for this Person

Person ID: 0011

EmplID:

Contact ID:

User ID's

User ID	Description
SMARX	Marx, Stu Mang

Last Modified: 05/09/2001 3:39PM PDT DVP1

Personal Info page

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

Name Info

This group box enables you to enter the worker's name according to the country format that you select. Depending on the country code that you've selected, not all options for names appear on the page.

Format for Country

Select the appropriate country name format for this person. When you navigate out of this field, the system displays the appropriate fields for the country that you entered.

Title

Select a title, such as Mr., Mrs., Duke, or Duchess, from the list of valid titles. The system stores titles in the Title table. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo Rules.

Preferred First Name

For the Netherlands, if the employee prefers to use a name different from the official first name, enter it here. The system uses the preferred name when you generate form letters or mailing labels for this employee.

Second Last Name	For Spanish employees, enter the second surname (mother's surname).
Royal Suffix	To record the royal suffix, select a value from the available options. Valid values are stored on the Name Royal Suffix page. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo Rules.
Name	The name that the system uses when you generate form letters or mailing labels for this worker.
Prefix	Prefix for an individual (such as Mr., Ms., Mrs., Dr., and so on).
First Name	The person's first name.
Middle Name	The person's middle name.
Last Name	The person's last name.
Suffix	Any suffix associated with the name.
Salutation Code	Enter a salutation code that appears on correspondence.
Contact Flag	The default value for all workers is Internal . Both employees and non-employees can be internal contacts. For example, they can be contacts that are in a provider group or are users of your help desk.
Preferred Communication	The type of communication to use for this worker. In PeopleSoft CRM, the only valid values are Call , Fax , and Standard Mail .
Language Code	<p>The language in which you want the field labels and report headings of your reports to be printed. The field values appear as you enter them.</p> <p>Language also refers to the language spoken by an employee, applicant, or non-employee.</p>
EmplID (employee ID)	Unique identification code for an individual associated with your organization. These IDs typically come from your human resources system.
IDs Defined for This Person	
Person ID	The ID defined for this person in your system.
EmplID (employee ID)	Unique identification code for an employee associated with your organization.
Contact ID	The ID defined for this person as a contact.
Last Modified	Display-only field that indicates the date and time when the attached file was last modified.

Personal Address/Phone/Email Page

Usage	Use the Personal Address/Phone/Email page to enter address, phone, and email information for the worker.
Object Name	RB_PERSON_ADDRESS
Navigation	Manage Workforce, Manage Workforce, Use, Worker, Address/Phone
Access Requirements	Enter a person ID.

Personal Info Personal Address/Phone/Email Work Function Storage Locations

Person ID: NEXT

Address Info View All First 1 of 1 Last

'Address Seq: 1 + -

Address Detail View All First 1 of 1 Last

'Effective Date: 05/08/2001 'Status: Active + -

'Address Type: Business 'Address ID: NEXT

Description:

Country: CAN Canada

Address 1:

Address 2:

Address 3:

Address 4:

City:

County: Postal:

Province:

Time Zone:

Last Modified:

Phone Info View All First 1 of 1 Last

'Phone Type	Description	Primary	Int'l Prefix	Telephone	Phone Extension
		<input type="checkbox"/>			

+ -

Email Info View All First 1 of 1 Last

'Email Type	Description	Primary	'Email Address
		<input type="checkbox"/>	

+ -

Personal Address/Phone/Email page

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

Address Info

Enter information that relates to the worker's location, status, and address.

Address Seq (address sequence)

The sequential number that the system assigns as you add addresses.

Effective Date	Date that the row in the table becomes effective.
Status	Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i> .
Address Type	The type of address that you are entering. Valid values are <i>Legal</i> , <i>Business</i> , <i>Campus</i> , <i>Dormitory</i> , <i>Home</i> , <i>Mailing</i> , and <i>Other</i> . The only value that is populated from PeopleSoft HRMS is <i>Mailing</i> .
Address ID	Use this field to associate the address with an existing address ID.
Description	The name that you want to associate with the address.
Country	The country code for the worker. The country code determines which address fields appear on the screen. Not all of the address fields described in this section will apply to the country's address format.
Address 1	Freeflow text-entry field that enables you to describe street, street number, apartment number, and other address information.
Address 2	Freeflow text-entry field that enables you to describe street, street number, apartment number, and other address information.
Address 3	Freeflow text-entry field that enables you to describe street, street number, apartment number, and other address information.
Address 4	Freeflow text-entry field that enables you to describe street, street number, apartment number, and other address information.
Block (Bloque)	In Spanish addresses, a building or buildings that are close together may be called a block (bloque). Include the block name in the address, if necessary.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
City	Enter the name of the city (if a United States address) or town (if international).
County (also Prefecture and Parish)	Name of county (prefecture/parish) for address, if applicable.
Postal	Enter a postal code for both U.S. and international addresses.
State	The state, if this is a U.S. address.
Province	The province code, if this is a Canadian address.
Time Zone	The time zone of the address.
Last Modified	The date and time that the address was last modified.

Phone Info

This group box enables you to enter different types of phone numbers for your worker.

Phone Type	Select the type of phone number this is. Valid values are <i>Business, Cellular, Default, Fax, Home, Pager 1, Pager 2, or Telex.</i> Phone types <i>Home</i> and <i>Default</i> are not updated by PeopleSoft HRMS.
Int'l Prefix (international prefix)	Enter the international prefix for the phone number.
Telephone	Enter the telephone number.
Phone Extension	Enter any relevant extension for the phone number.
Primary	Select this check box if this is the main phone number for the individual. An individual can have only one primary phone number.

Email Info

This group box enables you to enter different email addresses for your worker. To enable workflow for this person, the person must have a primary email address listed on this page. Otherwise, the person will be unable to receive email notifications.

Email Type	Enter <i>Business, Campus, Business, Home, or Other.</i> PeopleSoft HRMS updates only the email type <i>Business.</i>
Email Address	Enter the email address for the worker (for example, <i>joe_smith@company.com</i>).
Primary	Select this check box if this is a primary email address. An individual can have only one primary email address.

Work Page

Usage	Use the Work page to enter information about the person's job.
Object Name	RB_WORKER
Navigation	Manage Workforce, Manage Workforce, Use, Worker, Work
Access Requirements	Enter a person ID.

Personal Info	Personal Address/Phone/Email	Work	Function	Storage Locations
Stu Marx		Person ID: 0011		
'Department SetID: <input type="text" value="SHARE"/>				
'Department: <input type="text" value="KU0000"/> United States Operations				
'Location SetID: <input type="text" value="SHARE"/>				
'Location Code: <input type="text" value="L00001"/> National Office				
Time Zone: <input type="text"/>				
Physical Location: <input type="text"/>				
'Job Code SetID: <input type="text" value="SHARE"/>				
'Job Code: <input type="text" value="KU057"/> Sales Representative				
Holiday Schedule: <input type="text"/>				
Supervisor ID: <input type="text"/>				
Job Info				
'Employee Status: <input type="text" value="Active"/>		'Personnel Status: <input type="text" value="Employee"/>		
'Reg/Temp: <input type="text" value="Regular"/>		'Full/Part Time: <input type="text" value="Full-Time"/>		
'Officer Code: <input type="text" value="None"/>		Manager Level: <input type="text" value="Other"/>		
Person Type: <input type="text" value="Training"/>				
Last Modified: 04/10/2001 5:44PM PDT FUN				

Work page

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

Department SetID

The setID for the worker's department.

Department

The code for the worker's department. The system stores valid values in the Department table.

Location SetID

The setID for the location.

Location Code

The code for the worker's location. The system stores valid values in the Location table.

Time Zone

Display-only field that indicates the time zone for the location.

Physical Location

Freeform text of up to 30 characters to describe the worker's physical location. Use this field for office number, cubicle number, and so on.

Job Code SetID

The setID for the job code for this worker's job.

Job Code

The job code from the Job Code table. The system stores valid values in the Job Code table.

Holiday Schedule

The country holiday dates for this worker.

Supervisor ID

The ID for the person that this worker reports to.

Job Info

This group box contains information about the worker's employment status.

Employee Status	The status of the employee. Valid values are <i>Active</i> , <i>Deceased</i> , <i>Leave</i> , <i>Leave W/Py</i> (leave with pay), <i>Ret w/Pay</i> (retired with pay), <i>Retired</i> , <i>Suspended</i> , <i>Term w/Pay</i> (terminated with pay), <i>Term w/Pen</i> (terminated with pension), and <i>Terminated</i> .
Personnel Status	Select <i>Employee</i> or <i>Non-Employee</i> .
Reg/Temp (regular/temporary)	Indicate whether the worker is a regular or temporary employee.
Full/Part Time	Indicate whether the employee is full-time or part-time.
Officer Code	Use this field to identify highly compensated employees for the Non-Discrimination Testing - 401(k)/401(m) report (NDT004).
Manager Level	Valid values include <i>President</i> , <i>Director</i> , <i>Mid Mgr</i> (middle manager), <i>Non-Mgr</i> (non-manager), <i>Other</i> , <i>Sr Mgr</i> (senior manager), <i>Sr Officer</i> (senior officer), <i>Supervisor</i> , and <i>VP</i> (vice president).
Person Type	Describes the type of worker that the person is. For example, <i>Training</i> , <i>TempWrkr</i> (temporary worker), or <i>Independent</i> .

Function Page

Usage	Use the Function page to assign PeopleSoft CRM work functions to the worker. This page is for PeopleSoft CRM-specific work functions so that you can select or categorize workers by their function.
Object Name	RB_WORKER_FUNC
Navigation	Manage Workforce, Manage Workforce, Use, Worker, Function
Access Requirements	Enter a person ID.

Personal Info Personal Address/Phone/Email **Work** Function Storage Locations

Stu Marx Person ID: 0011

Worker Function Info View All First 1 of 1 Last

Worker Function	Description
MANAGER	Call Center Manager

Function page

The system displays the **Person ID** that you entered to access the system.

Worker Function Select the function of the worker from the drop-down list box.

Description Text description of the worker's function.

Storage Locations Page

Usage	Use the Storage Locations page to define the inventory storage locations associated with the good and defective storage locations on a field service worker's truck. Storage location information is required only for workers who perform field service activities. Material movement transactions initiated from the Manage Material page in PeopleSoft CRM FieldService update quantities in the inventory storage locations associated with the lead technician on the service order line. For more information about material movement transactions for service orders, see Managing Service Order Material Requirements.
Object Name	RB_WORK_STORLOC
Navigation	Manage Workforce, Use, Worker
Access Requirements	Enter a person ID.

Personal Info Personal Address/Phone/Email **Work** Function Storage Locations

Andy Aash Person ID: 10021

Worker's Storage Locations							Find View All	First	1-2 of 2	Last
*Location Type	*IN Unit	*Area	Level 1	Level 2	Level 3	Level 4				
Good	US003	ZONE1	AIS1	ROW1	BIN1		+	-		
Defective	US003	ZONE1	AIS1	ROW1	BIN2		+	-		

Storage Locations page

The system displays the worker's name and **Person ID**.

Worker's Storage Locations

The Worker's Storage Locations grid defines the inventory storage locations in PeopleSoft Inventory or a third-party inventory system associated with the good and defective stock locations on the field service worker's service truck. Each field service worker in your workforce must be associated with one good truck stock location and one defective truck stock location. You cannot define more than one good or more than one defective truck stock location for a worker. Also, the good and defective locations cannot have the same storage location definition—the area and up to four storage levels—in PeopleSoft Inventory or your third-party inventory system.

Note. Inventory business units and their material storage locations must be defined in PeopleSoft Inventory or your third-party inventory system before you can associate a worker's truck storage location with an inventory storage location.

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

Location Type	<p>The type of material location on the truck.</p> <p>Good: The location for material that can be used to complete a service request at a customer's site.</p> <p>Defective: The location of material that has been removed from a customer's site. Typically, the worker returns this stock to the central distribution center for inspection or scrap processing.</p>
IN Unit (inventory business unit)	<p>The identification of the inventory business unit with the material storage location that corresponds to the material location type on the worker's truck. The inventory business unit must first be defined in PeopleSoft Inventory or your third-party inventory system and inserted in the PeopleSoft CRM system using the Business Unit EIP.</p> <p>For more information about the Business Unit EIP, see <i>Defining Business Units in PeopleSoft CRM FieldService</i>.</p>
Area	<p>The material storage area in PeopleSoft Inventory or your third-party inventory system that corresponds to the material location type on the worker's truck. You can define a storage location address in an inventory system using a storage area and up to four levels representing a physical subdivision of the storage area, such as aisles, rows, shelves, and bins.</p>
Level 1	<p>The first level representing a physical subdivision of the storage area.</p>
Level 2	<p>The second level representing a physical subdivision of the storage area.</p>
Level 3	<p>The third level representing a physical subdivision of the area.</p>
Level 4	<p>The fourth level representing a physical subdivision of the area.</p>

Important! There are no prompts for the storage location definition fields: **Area**, **Level 1**, **Level 2**, **Level 3**, and **Level 4**. Unlike business units, storage location information is not synchronized with your inventory system. You must know the correct storage location definitions to enter. For material movement transactions initiated from the Manage Material page to be successfully recorded in your inventory system, the storage location definition that you enter must define a valid storage location for the inventory business unit referenced in the **IN Unit** field.

Creating Worker Functions

Worker functions are codes that help you assign certain types of jobs to your PeopleSoft CRM workers and give you the ability to group your workers by the type of job function that they perform. These codes and their descriptions appear on the Function page in the Worker component.

Worker Function Page

Usage	Use the Worker Function page to enter the codes that describe the different jobs that the worker performs.
Object Name	RB_WRK_FUNC_TBL
Navigation	Define Business Rules, Define General Options, Use R – Z, Worker Functions
Access Requirements	Enter a worker function.

Worker Function

Worker Function: MANAGER

Description: **Status:**

Short Description:

Worker Function page

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

Description	Freeform text that describes the function.
Short Description	Freeform text of up to 15 characters.

Maintaining Job Codes

The Job Code Table contains information on the various jobs in a company.

When you add, delete, or change job information in the PS_JOBCODE_TBL record (of the Job Code Table), the system automatically publishes the Jobcode Table EIP message to any other PeopleSoft or third-party applications that subscribe to the message. The message supplies the updated record information so that the data remains current on every database that subscribes to the published message.

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

Job Codes Page

Usage	Use the Job Codes page to enter information about various jobs within a company.
Object Name	RB_JOB_CODE
Navigation	Define Business Rules, Define General Options, Use E-Q, Job Codes
Access Requirements	Enter a setID and a job code.

Job Codes

SetID: SHARE
Job Code: KC001

View All First 1 of 1 Last

Effective Date: 01/01/1980	Status: Active	Description: Accounting Clerk
----------------------------	----------------	-------------------------------

Job Codes page

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

Effective Date	Date that the row in the table becomes effective.
Status	Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i> .
Description	Freeform text of up to 30 characters that describe the job code.

CHAPTER 10

Establishing Cost Categories for Workers

In PeopleSoft CRM, you can define cost categories that can be used to account for the labor costs incurred by your organization—that is, the cost incurred by your organization to provide a worker to perform a service for one of your customers.

The next sections define how cost categories can be used and document the fields on the Cost Category page.

Understanding Cost Categories

Define cost categories at the setID level using the Cost Categories page in the General Options menu. Once cost categories are defined, establish an hourly cost rate for each category for provider groups on the Provider Group Definition page and for group members on the Group Member page. Defining cost information in PeopleSoft CRM is optional—the system does not use this information. However, you can use cost rates defined for provider groups and group members to analyze the profitability of your organization and as a basis for establishing customer billing rates.

For more information about defining the hourly costs per cost category of provider groups and group members, see the Setting Up and Maintaining Provider Groups and Group Members chapter.

Cost Categories Page

Usage	Use the Cost Categories page to define the cost categories that are used to account for the cost of labor time to your company. Hourly rates for each cost category can be defined for provider groups on the Provider Group Definition page and group members on the Group Member page. For more information about defining the hourly costs per cost category of provider groups and group members, see the Setting Up and Maintaining Provider Groups and Group Members chapter.
Object Name	RF_COST_CAT
Navigation	Define Business Rules, Define General Options, Use A-D, Cost Categories

Access Requirements	Enter a setID.
---------------------	----------------

Cost Categories

SetID: CRM01

*Cost Category Code	*Description	Short Description		
AFTR	After Hours	After Hour	+	-
DOUB	Double Time	Double	+	-
HALF	Time and Half	1.5	+	-
PAGER	Pager	Pager	+	-
STRT	Straight Time	Straight	+	-
TRAVL	Travel	Travel	+	-

Cost Categories page

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

Cost Categories

In the **Cost Categories** grid, you can view or define each of the cost categories associated with a setID.

Cost Category Code

The cost category codes defined for the setID. For each new cost category that you define, enter a cost category code using up to five alphanumeric characters.

Description

The long description associated with each category code. For each new cost category that you define, enter a description of the category code using up to 30 alphanumeric characters.

Short Description

The short description associated with each category code, if applicable. For each new cost category, you can enter a short description using up to 10 alphanumeric characters. If you do not add a short description, the system automatically populates this field with the first 10 characters of the long **Description**.

CHAPTER 11

Setting Up and Maintaining Provider Groups and Group Members

Provider groups are the groups of workers that provide the services or support offered by your organization. Cases and service orders are assigned first to a provider group and then to a member of a provider group.

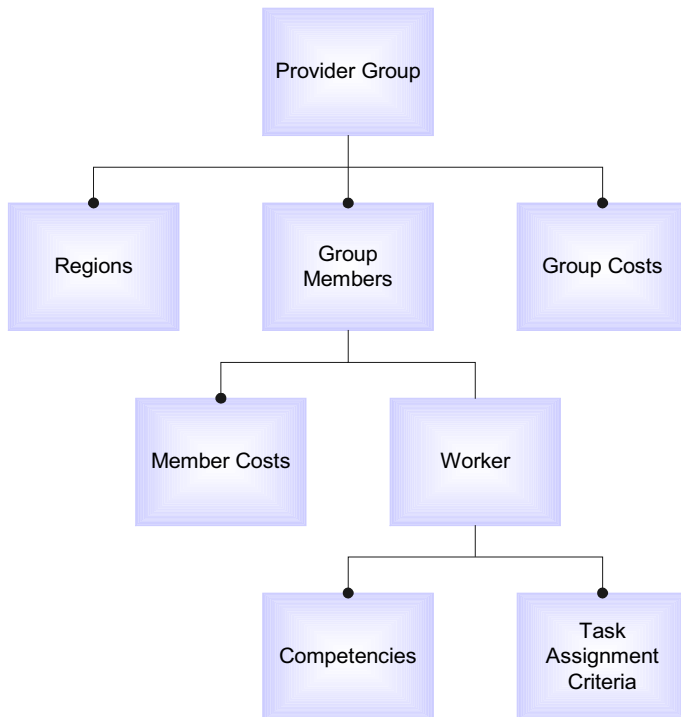
The following sections define how provider groups are used in the system, detail the prerequisite steps for creating provider groups and group members, and document the fields on the Provider Group page and the Provider Group Member page.

Understanding Provider Groups and Group Members

You can divide your workforce into provider groups using the organizational criteria that best matches your business needs. For example, you can create provider groups that represent workers who service or support specific geographic regions, specific products, or specific customers. Your provider groups may also represent workers who have specific competencies. Workers can belong to multiple provider groups; however, each worker that can be assigned to a service order must be defined as a member of at least one provider group in your system.

Provider Group Data Model

As the following diagram illustrates, a provider group definition includes regions, members, and group cost information.



Provider group and group member data model

Each group member is a worker defined in your system and can represent employees or third-party contractors. Cost information can also be defined at the group member-level for each worker in the group.

Workers are defined in your system using the Worker component. For workers who are call center agents, you can define task assignment criteria that the system can use to evaluate which group member is the best to assign to a particular case. For workers who are technicians, you can define competencies and task assignment criteria so that the system can evaluate which group member is the best to assign to a particular service order.

For more information about defining workers, see the Managing Workers chapter. **For more information** about defining competencies for workers, see the Managing Workforce Competencies chapter. **For more information** about system-directed task assignment, see the Setting Up and Performing Task Assignment Searches chapter.

Default Provider Assignments for Service Orders

Default assignments for provider groups and group members can be automatically populated for service orders based on the related agreement or the service. When a service order is covered by an agreement, the default provider group and group member assignment comes from the agreement. For on-demand service orders, the default provider group and group member comes from the service definition.

For more information about specifying default provider groups and group members on agreements, see the Setting Up and Managing Agreements and Warranties in the *PeopleSoft CRM FieldService PeopleBook*. **For more information** about specifying default provider groups and group members on service definitions, see Setting Up Your Services in the *PeopleSoft CRM FieldService PeopleBook*.

System-Suggested Provider Assignments

When no default assignment values are available on the service order, you can click Suggest Group and Suggest Technician links on the service order. For provider group searches, the system returns a list of provider groups that have an associated region that matches the region derived from the customer information on the case or service order. For group member searches, the system returns a list of eligible agents or technicians that have been ranked using criteria from the service order or case, the competencies defined for the worker, and the worker's availability, as applicable.

When no default assignment values are available on the case, you can click Suggest a Provider Group and Suggest an Agent buttons on the case to select from a list of system-suggested provider groups and group members. For provider group searches, the system returns a list of provider groups that have an associated region that matches the region derived from the customer information on the case or service order. For group member searches, the system returns a list of eligible agents or technicians that have been ranked using criteria from the service order or case and the worker's availability, as applicable. The system does not consider competencies for case assignments.

For more information about the algorithms used to suggest provider groups and group members on service orders and cases, see the Setting Up and Performing Task Assignment Searches chapter.

Creating Provider Groups

Set up your provider groups and define the associated group members using the Provider Group page. However, there are several prerequisite steps in the provider group definition process.

To define a provider group:

1. Define regions for your system.

Every provider group must be associated with at least one region. Define regions using the Region page in the General Options menu.

Note. Although you can define region hierarchies on the Region page, the system considers only the highest level of the hierarchy when suggesting possible provider groups for a service order assignment.

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

2. Define cost categories for your system (optional).

For your own informational purposes, you can define the cost categories to use for labor cost accounting. For each provider group or group member, you can define hourly cost rates for each cost category defined in your system. This information is not used by the system. However, you can use cost rates defined for provider groups and group members to analyze the profitability of your organization and as a basis for establishing customer billing rates. Cost categories are defined on the Cost Categories page in the General Options menu.

For more information about cost category definition, see the Establishing Cost Categories for Workers chapter.

3. Define the workers in your system.

Provider group members are selected from the workers defined in your system using the Worker component.

For more information about worker definition, see the Managing Workers chapter.

4. Define the provider groups in your system and the members of each group.

To assign service orders to a worker, the worker must be an active member of an active provider group in your system. Use the Provider Group page to define a provider group and its associated members. Group members can also be defined and associated with a provider group on the Provider Group Member page.

Provider Group Page

Usage	Use the Provider Group page to define and maintain the groups of people who will perform service activities for your customers. Cases and service orders can be assigned to the active provider groups defined in your system.
Object Name	RF_PROVIDER_GRP
Navigation	Manage Workforce, Manage Workforce, Use, Provider Groups
Access Requirements	Enter a setID and a provider group ID.

Provider Group

SetID: CRM01 Provider Group ID: APLE

Basic Information

*Name: Appliances Eastern *Status: Active

Customer:

Notifications

Group Worklist Name: FS_WORKLIST ☐ Use Members to Broadcast

Email Address:

Comments:

Currency Code: USD US Dollar

Group Cost Categories

Find | View All First 1-3 of 3 Last

*Cost Category	*Hourly Rate	Currency	*Multiplier	*Billable Rate
AFTTR	90.000000	USD	3.00	270.000000
PAGER	100.000000	USD	3.00	300.000000
STRT	60.000000	USD	3.00	180.000000

Regions

Find | View All First 1 of 1 Last

*Region	Status
Eastern	Active

Group Members

Find | View All First 1-3 of 3 Last

Name (Lastname,Firstname)	*Status
Dubin,Robin L	Active
Gardner,Shirley M	Active
Pine,Teresa P	Active

Added: 04/03/2001 1:37PM PDT NAPA

Last Modified: 04/27/2001 10:03AM PDT DVP1

Provider Group page

The system displays the **SetID** and **Provider Group ID** that you entered to access the page.

Basic Information

The fields under **Basic Information** provide general information about the provider group.

Name

The name of the provider group. For each new provider group that you define, enter a name for the provider group using up to 40 alphanumeric characters.

Status

The current status of the provider group in your system. A provider group can have one of the following status values:

Active: Indicates that the provider group is available for use in your system and can be selected for service orders and cases.

Inactive: Indicates that the provider group is not available for use in your system and cannot be selected for service orders and cases. Inactive provider groups do not appear as options in system prompt lists. You cannot change the status of a provider group to **Inactive** if there is an open service order assigned to any of the group members.

Note. When you change the status of a provider group to **Inactive**, the status of all members in the group is changed to **Inactive**. You cannot change the status of the members in an inactive provider group. When you change the status of a provider group from **Inactive** to **Active**, the status of the group members remains **Inactive**. You must manually change the status of each group member to **Active** individually.

Customer

The company associated with the provider group. When a provider group represents staff from a third-party contractor, use this field to define the name for the third-party company. To select an associated company, the company must first be defined in your system using the Maintain Customers component. To define a new associated company, click the transfer button to access the Maintain Customers component.

For more information about the Maintain Customers component, see the Managing Customer Information chapter.

Type

For informational purposes only, the **Type** group box defines whether the members of the provider group are your own **Internal** employees, **Partner/TPM** (partner or third-party maintainer) employees, or **Both**.

Notifications

The **Notifications** group box specifies where workflow notifications for service order and case assignments, assignment changes, and cancellations are sent.

For more information about assignment notification workflow for service orders, see Creating and Managing Service Orders in the *PeopleSoft CRM FieldService PeopleBook*.

Group Worklist Name

The name of the group worklist associated with the provider group. The worklist name must first be established on the Worklist Groups page.

For more information about defining worklist groups, see the Using Worklists chapter.

Use Members to Broadcast Indicates whether all members of the provider group should receive notification when an assignment or an assignment change on a service order affects the provider group. If this check box is selected, assignment and assignment change notifications for the provider group will be published as a worklist entry and an email.

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

Email Address The email address used to send notifications to the provider group.

Comments

The **Comments** field captures notes recorded about the provider group.

Group Cost Categories

The **Currency Code** field indicates the currency used to determine the labor costs for the work provided by the provider group members. The currency that you select becomes the default currency for new rows in the **Group Cost Categories** grid. Currency codes are established on the Currency Code page.

For more information about the defining currencies, see the Maintaining Currencies and Market Rates chapter.

The **Group Cost Categories** grid reflects the costs per hour and corresponding billable rates for the members of the provider group. Defining cost information for the provider group is optional—this data is not used by the PeopleSoft CRM system.

Cost Category The code of the cost category used to account for the labor time of members in the provider group. To associate a new cost category with the provider group, you must first define a cost category code on the Cost Categories page.

For more information about defining cost category codes, see the Establishing Cost Categories for Workers chapter.

Hourly Rate The cost to your company for one hour of labor time charged to this cost category.

Currency The currency of the **Hourly Rate** amount.

Multiplier A numeric value that can be used to generate an hourly billing rate based on the hourly rate.

Billable Rate A value calculated at save time or the next server trip reflecting the hourly billing rate based on the following formula:

Billable Rate = Hourly Rate × Multiplier.

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

Regions

The **Regions** grid displays the areas served by the provider group. At least one region must be associated with the provider group. To suggest provider group assignments on the service order, the system returns a list of provider groups associated with the same region as derived from the site, contact, or customer information on the service order.

For more information about how the system suggests provider group assignments for cases and service orders, see the Setting Up and Performing Task Assignment Searches chapter.

Region

The name of the region associated with the provider group. Each provider group must be associated with at least one region. To associate a new region with the provider group, you must first define the region using the Region page. Click the transfer button next to this field to access the Region page.

Status

The current status of the region as defined on the Region page.

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

Group Members

The **Group Members** grid displays the people currently associated with the provider group.



Click the **Details** button to access the Provider Group Member page, where you can view or modify the group member record. The Group Member page is documented in the next section.

Name (Lastname, Firstname)

The name of the group member. Before you can add a new person to the group, the person must be defined in your system using the Worker component. Click the transfer button next to this field to access the Worker component.

For more information about defining workers, see the Managing Workers chapter.

Note. You can also define members of the provider group on the Provider Group Member page, which is documented in the next section.

Status

The person's current status as a member of this provider group. A group member can have one of the following status values:

Active: Indicates that the group member can be assigned to service orders and cases serviced by this provider group.

Inactive: Indicates that the group member cannot be assigned to service orders and cases serviced by this provider group. Inactive group members do not appear as options in system prompt lists. You cannot change the status of a group member to **Inactive** if there is an open service order assigned to the group member. Similarly, you cannot delete a group member from the provider group if there is an open service order assigned to him or her.

Note. When you change the status of a provider group to **Inactive**, the status of all members in the group is changed to **Inactive**. You cannot change the status of the members in an inactive provider group. When you change the status of a provider group from **Inactive** to **Active**, the status of the group members remains **Inactive**. You must manually change the status of each group member to **Active** individually.

The **Added** field displays a time stamp indicating when the provider group record was created and the user ID of the person who created it. Similarly, the **Last Modified** field displays a time stamp indicating when the provider group definition record was updated and the user ID of the person who made the change.

Provider Group Member Page

Usage	Use the Provider Group Member page to define the people associated with your provider groups.
Object Name	RF_GRP_MEMBER
Navigation	<ul style="list-style-type: none"> • Manage Workforce, Manage Workforce, Use, Provider Group Members • Click the Details button on the Provider Group page.
Access Requirements	When accessing this page from the menu, enter a setID, a provider group ID, and a person ID.

Provider Group Member

SetID: CRM01
 Provider Group: APLE Appliances Eastern Status: Active

Member Information

Name: Teresa Pine
 *Status: Active

Notifications

User ID: DVP1

Comments:

Currency Code:

Member Cost Categories Find | View All First 1 of 1 Last

*Cost Category	*Hourly Rate	Currency	*Multiplier	*Billable Rate

Assigned Service Orders Find | View All First 1 of 2 Last

Unit	Service Order	Status	Priority	Line	Activity	Act Status	Act Priority	Start Date	Start Time	End Date	End Time
US200	0000000051	Open	Normal	1	DW-1001	Assigned		04/26/2001	11:00AM	04/27/2001	3:00PM
US200	0000000051	Open	Normal	2	DW-1002	Assigned		04/26/2001	11:00AM	04/27/2001	3:00PM

Added: 04/03/2001 1:37PM PDT NAPA
 Last Modified: 04/03/2001 1:37PM PDT NAPA

Provider Group Member page

The system displays the **SetID**, the **Provider Group** ID of the group member, and the **Status** of the provider group. To view details about the selected provider group, click the transfer button next to the provider group ID to access the Provider Group page which is documented in the previous section.

Member Information

The fields under **Member Information** capture general information about the group member.

Name

The name of the group member. Before you can add a new person to the group, the person must be defined in your system using the Worker component. Click the transfer button next to this field to access the Worker component.

Note. When you add a group member name, the names appear in last name, first name format. When the page is saved, the system displays the name in first name, last format. You cannot change the name entry after saving the page. You can only delete the entry and add a new entry.

For more information about defining workers, see the Managing Workers chapter.

Note. You can also define members of the provider group on the Provider Group page, which is documented in the previous section.

Status

The person's current status as a member of this provider group. A group member can have one of the following status values:

Active: Indicates that the group member can be assigned to service orders and cases serviced by this provider group.

Inactive: Indicates that the group member cannot be assigned to service orders and cases serviced by this provider group. Inactive group members do not appear as options in system prompt lists. You cannot change the status of a group member to **Inactive** if there is an open service order assigned to the group member. Similarly, you cannot delete a group member from the provider group if there is an open service order assigned to him or her.

Note. When you change the status of a provider group to **Inactive**, the status of all members in the group is changed to **Inactive**. You cannot change the status of the members in an inactive provider group. When you change the status of a provider group from **Inactive** to **Active**, the status of the group members remains **Inactive**. You must manually change the status of each group member to **Active** individually.

Notifications

The **Notifications** group box displays the **User ID** associated with the group member. The system uses the notification routing preferences associated with the group member's user ID to publish workflow notifications about service order assignment changes that affect the group member. Routing preferences are defined for the group member's user profile on the Workflow page of the User Profiles component.

For more information about defining user profiles, see User Profiles in the *PeopleTools PeopleBook*. **For more information** about assignment notification workflows for service orders, see Creating and Managing Service Orders in the *PeopleSoft CRM FieldService PeopleBook*.

Comments

The **Comments** field contains any notes recorded about the group member.

Member Cost Categories

The **Currency Code** field indicates the currency used to determine the labor costs for the work provided by the group member. The currency that you select becomes the default currency for new rows in the **Member Cost Categories** grid. Currency codes are established on the Currency Code page.

For more information about the defining currencies, see the Maintaining Currencies and Market Rates chapter.

The **Member Cost Categories** grid reflects the costs per hour and corresponding billable rates for the group member. Defining cost information for the provider group member is optional—this data is not used by the PeopleSoft CRM system.

Cost Category	<p>The code of the cost category used to account for the labor time of the group member. To associate a new cost category with the group member, you must first define a cost category code on the Cost Categories page.</p> <p>For more information about defining cost category codes, see the Establishing Cost Categories for Workers chapter.</p>
Hourly Rate	The cost to your company for one hour of labor time charged to this cost category.
Currency	The currency of the Hourly Rate amount.
Multiplier	A numeric value that can be used to generate an hourly billing rate based on the hourly rate.
Billable Rate	<p>A value calculated at save time or the next server trip reflecting the hourly billing rate based on the following formula:</p> $\text{Billable Rate} = \text{Hourly Rate} \times \text{Multiplier}.$ <p>Note. As delivered, PeopleSoft CRM does not provide integration with billing systems. Billing data recorded in the system is for informational purposes only.</p>

Assigned Service Orders

In the **Assigned Service Orders** grid, you can view the service order assignments for the group member. The grid displays assignments for the group member at both the header level and line level of the service order, unless the group member is assigned to both the header and the line. In this case, information is displayed only for the service order line.

For more information about service orders and the fields on service order lines, see Creating and Managing Service Orders in the *PeopleSoft CRM FieldService PeopleBook*.

Unit	The PeopleSoft FieldService business unit where the service order originated.
Service Order	The identification number of the service order.
Status	The status of the service order.
Priority	The priority associated with the service order.

Line	The service order line number on the service order.
Activity	The code associated with the activity.
Act Status (activity status)	The status of the service order activity.
Act Priority (activity priority)	The priority associated with the service order activity.
Start Date	The required start date for the service order or service order line.
Start Time	The required start time on the start date for the service order or service order line.
End Date	The required end date for the service order or service order line.
End Time	The required end time on the end date for the service order or service order line.

The **Added** field displays a time stamp indicating when the group member record was created and the user ID of the person who created it. Similarly, the **Last Modified** field displays a time stamp indicating when the group member record was updated and the name of the person who made the change.

CHAPTER 12

Managing Workforce Competencies

In PeopleSoft CRM, competencies define the skills of your workforce. You can associate a set of competencies with each worker and rate the worker's level of proficiency for each competency. In PeopleSoft CRM FieldService, you can define a minimum level of competency proficiency required to perform a service or service activity. By comparing the competency requirements of the service or service activity with the competency proficiency ratings of your workforce, the system can generate a list of qualified candidates to assign to a service order.

For more information about associating competencies with services and service activities, see Setting Up Your Services in the *PeopleSoft CRM FieldService PeopleBook*. **For more information** about generating a list of eligible workers to assign to a service order, see the Setting Up and Performing Task Assignment Searches chapter.

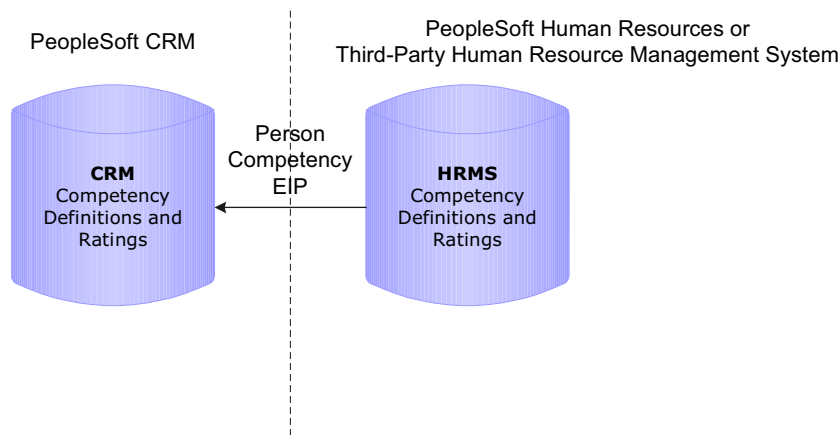
The next sections describe methods of defining competency information and document the pages used to manually define and view competency information in your PeopleSoft CRM system.

Understanding Competency Definition in PeopleSoft CRM

In PeopleSoft CRM, you can enter competencies and competency proficiency ratings online using components within your PeopleSoft CRM system or you can synchronize your system tables with the competency information defined in PeopleSoft Human Resources or your third-party human resource management system using the Person Competency EIP.

The Person Competency EIP includes two application messages: PERSON_COMPETENCY_FULLSYNC, and PERSON_COMPETENCY_SYNC. At initial implementation, your human resource management system publishes a full set of competency records to your PeopleSoft CRM system using the PERSON_COMPETENCY_FULLSYNC application message. When competency definitions in the human resource management system are added or modified after the initial full synchronization, each addition and change is published to the PeopleSoft CRM system using the PERSON_COMPETENCY_SYNC application messages.

Note that the PeopleSoft 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 your human resource management system. All updates to competency records should be made in your human resource management system and published to PeopleSoft CRM, as illustrated in the following diagram:



When you synchronize competency information with another system using the Person Competency EIP, all changes to competency information should be made in the other system

For more information about the Person Competency EIP, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook*. **For more information** about defining competencies and competency ratings, see the *PeopleSoft Human Resources PeopleBook*. **For more information** about setting the pages of the Installation component in PeopleSoft CRM, see the Setting General Options chapter.

Defining and Maintaining Competency Information in PeopleSoft CRM

If you are not synchronizing competency information with another system using the Person Competency EIP, you must manually define competency rating models, competencies, and the competency proficiency of your workers using components in PeopleSoft CRM.

To set up competencies in your PeopleSoft CRM system:
--

1. Define a competency rating model using the Competency Rating Model page.

A rating model specifies how you measure a worker's proficiency for a particular competency. The rating model is also used to define the minimum level of proficiency for a competency that is required to perform a service or service activity on a service order. By matching the proficiency of workers with the minimum proficiency requirements on a service order, the system is able to suggest qualified candidates to assign to the service order.

Important! When defining rating point scales for rating models that will be used to rate the proficiency of a technician or define the minimum proficiency required for a service or service activity, use a numeric rating system in which the highest number represents the highest level of proficiency. **For more information** about how the task assignment engine uses the rating points, see Setting Up and Performing Task Assignment Searches.

2. Define types of competencies on the Competency Types page (optional).

Competency types are broad categories of competencies. Every competency you define can be associated with one or more types. Although competency types are not used by the system, they enable you to develop reports reflecting competency categories.

3. Define the competencies that your workforce requires on the Competencies page.

To enable service order task assignment, you should define each skill required to complete work on a service order as a competency in your system. You can also define other competencies that you want to track for informational purposes.

4. Define levels of competency proficiency for your workers on the Competency Assignment page.

The system uses a worker's level of proficiency for a given competency to evaluate whether the worker is qualified to perform work on a service order. You can also track the competency proficiencies of your workforce for informational purposes.

5. Define minimum competency proficiency requirements for your services and service activities.

In PeopleSoft CRM FieldService, the system evaluates which workers are qualified to perform work on a service order by matching the worker's proficiency with the minimum competency proficiency requirements defined for a service or service activity on the service order.

For more information about associating competencies with services and service activities, see Setting Up Your Services in the *PeopleSoft CRM FieldService PeopleBook*. **For more information** about generating a list of eligible workers to assign to a service order, see the Setting Up and Performing Task Assignment Searches chapter.

Competency Rating Model Page

Usage	Use the Competency Rating Model page to define codes for indicating a worker's level of proficiency for a competency and to indicate the minimum competency proficiency required to perform a service or service activity. Proficiency ratings are associated with workers using the Competency Assignment component and with services and service activities using the Service component. You can define a single rating model for your entire organization or build multiple ratings models for different projects or for
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	different branches of your organization. The Competency Assignment component is documented later in this chapter. For more information about associating competencies with services and service activities, see Setting Up Your Services in the <i>PeopleSoft CRM FieldService PeopleBook</i> .
Object Name	CM_REVW_RATING_TBL
Navigation	Define Business Rules, Define General Options, Use A – D, Competency Rating Model
Access Requirements	Enter a rating model ID.

Competency Rating Model

Rating Model: PSCM

Description Find | View All First 1 of 1 Last

*Effective Date: 01/01/1980 Status: Active

*Description: Competency Management Scale Short Description: Comp Mgmt

*Rating	*Description	Short Description	Rating Points
0	0-None	None	0
1	1-Little	Little	1
2	2-Fair	Fair	2
3	3-Good	Good	3
4	4-Very Good	Very Good	4
5	5-Expert	Expert	5
6	6-Trainer	Trainer	6

Competency Rating Model page

The system displays the **Rating Model** you entered to access the page.

Description

The fields at the top of the **Description** scroll area define the name of the rating model and when it is available for use in your system.

Effective Date

The date the rating model becomes effective. To be available in the system, a rating model must have a status of *Active* and an effective date that falls on or before the current date.

Status

The status of the rating model definition. The following status values are available:

Active: Indicates that the rating model is available for use in your system as of the **Effective Date**.

Inactive: Indicates that the rating model is not available for use in your system.

For more information about effective dates, see Using PeopleSoft 8 Applications.

Description	The long description associated with the rating model ID. When defining a new rating model, you can enter a long description using up to 30 alphanumeric characters.
Short Description	The short description associated with the rating model ID. When defining a new rating model, you can enter a short description using up to 10 alphanumeric characters. If you do not specify a short description, the system populates this field with the first 10 characters of the long description when you save the page.
Rating Levels	
The next grid defines the rating levels associated with the rating model.	
Rating	A code that represents the rating level. When defining a rating, you can enter a code using one alphanumeric character.
Description	A long description of the rating level. When defining a rating, you can enter a description of the rating code using up to 30 alphanumeric characters.
	Note. We recommend that you include the numeric number of the rating at the beginning of the rating level description. This enables the system to display the rating descriptions in numerical order instead of alphabetical order on the prompts where users select ratings levels.
Short Description	A short description of the rating level. When defining a rating, you can enter a short description of the rating code using up to 10 alphanumeric characters. If you do not specify a short description, the system populates this field with the first 10 characters of the long description when you save the page.
Rating Points	A numeric value that is used by the task assignment engine to represent the relative importance of each rating.

Important! When defining rating point scales for rating models that will be used to rate the proficiency of a technician or define the minimum proficiency required for a service or service activity, use a numeric rating system in which the highest number of points represents the highest level of proficiency. Otherwise, the fit score values calculated by the task assignment engine will not accurately reflect the best qualified candidate. **For more information** about how the task assignment engine uses the rating points, see Setting Up and Performing Task Assignment Searches.

Competency Types Page

Usage	Use the Competency Types page to define competency types, which are broad categories of competencies relevant to particular positions or projects in your enterprise. When a competency is defined on the Competencies page, it can be associated with one or more of the competency category types defined on this page.
Object Name	CM_TYPE_TABLE
Navigation	Define Business Rules, Define General Options, Use A-D, Competency Types
Access Requirements	Enter a competency type.

Competency Types

Competency Type: CRM13

Description: Preventive Maintenance

Short Description: Gen Mtce

Competency Types page

The system displays the **Competency Type** you entered to access the page and the associated description text. When you define a new competency type, you can enter a long **Description** of the type using up to 30 alphanumeric characters. You can also enter a **Short Description** using up to 10 characters. If you do not enter a short description, the system populates this field with the first 10 characters of the long description.

Competencies Page

Usage	Use the Competencies page to establish codes representing any worker skills, abilities, knowledge, or behaviors pertinent to jobs in your organization, such as
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	the ability to repair and maintain specific products or equipment, knowledge of specialized manufacturing processes, or expertise with computer programming languages. The codes can be as broad or detailed as you like and can represent any type of competency.
Object Name	COMPETENCY_TABLE
Navigation	Define Business Rules, Define General Options, Use A-D, Competencies
Prerequisites	You must first define the rating models that indicate a worker's degree of proficiency using the Competency Rating Model page, which is documented earlier in this chapter.
Access Requirements	Enter a competency.

Competencies

Competency: 1205

*Description: Printer Copier Repair

Short Description: Prt Repair

*Rating Model: PSCM Competency Management Scale

Comments: Printer and copier repair

Competency Types First 1 of 1 Last

*Type	Description
CRM02	Printer & Copier Service

Competencies page

The system displays the **Competency** code you entered to access the page.

Competency Description

The fields at the top of the page record the description, category, and rating model information for the competency.

Description

The long description of the competency. When you define a new competency, you can enter a long description using up to 30 alphanumeric characters.

Short Description

The short description of the competency. When you define a new competency, you can enter a short description using up to 10 alphanumeric characters. If you do not define a short description, the system populates this field with the first 10 characters of the long description when you save the page.

Rating Model	The model used to evaluate a worker's degree of expertise for this competency. Rating models must first be established on the Competency Rating Model page, which is documented earlier in this chapter.
Comments	Notes associated with the competency.

Competency Types

The **Competency Types** grid lists the competency types that may optionally be associated with the competency. Competency types must first be established on the Competency Types page, which is documented earlier in this chapter.

Type	The associated competency type.
Description	The long description associated with the competency type on the Competency Types page.

Competency Assignment Page

Usage	Use the Competency Assignment page to associate a worker with a competency and define the worker's level of proficiency for the competency. In PeopleSoft CRM, the system can evaluate which members of your workforce are qualified to perform work on a service order by comparing worker proficiency with the competency proficiency required for a service or service activity on a service order. For more information about generating a list of eligible workers to assign to a service order, see the Setting Up and Performing Task Assignment Searches chapter.
Object Name	RB_PERS_COMP_PROF
Navigation	Manage Workforce, Manage Competencies, Use, Competency Assignment
Prerequisites	Before assigning competencies, you must set the Use Only Evaluation Type field on the General Options page of the Installation component.
Access Requirements	Enter a person ID.

Competency Assignment

Teresa Pine Person ID: 588

Assigned Competencies Find | View All First 1-3 of 3 Last

Description	Proficiency
Printer Copier Repair	3-Good + -
Install Remove Printer Copier	5-Expert + -
Preventive Maint PrinterCopier	4-Very Good + -

Competency Assignment page

The system displays the name and **Person ID** of the person whose competencies are being evaluated.

Important! 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 PeopleSoft CRM pages. Although evaluation type is not displayed in PeopleSoft CRM, the pages in 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.

Assigned Competencies

The **Assigned Competencies** grid lists the competencies that are associated with the worker.

Description	A description of the competency. Competencies must first be established on the Competencies page, which is documented earlier in this chapter.
Proficiency	The worker's level of expertise for the competency. The rating model defined for the competency on the Competencies page determines the available proficiency values. In PeopleSoft CRM FieldService, the system checks a worker's proficiency level for a competency to determine whether the worker is qualified to perform work on a service order that requires the competency.

CHAPTER 13

Using Resource Calendars

In PeopleSoft CRM, every worker defined in the system is associated with a monthly and daily calendar. Workers and managers can manually update the calendars to reflect daily tasks. In PeopleSoft CRM Sales, system events can automatically update the calendar of a sales representative to reflect leads and opportunities. Similarly, in PeopleSoft CRM FieldService, system events can automatically update the calendars of technicians to reflect service order assignments. When suggesting eligible candidates to assign to a service order and case, the system checks the availability of the qualified workers. If a worker has another task scheduled, or it is not within their work hours during the period defined by the required start and end time on the service order, the system eliminates the worker for the list of suggested candidates.

For more information about using calendars for sale representatives, see Defining Users and Territories in the *PeopleSoft CRM Sales PeopleBook*. **For more information** about generating a list of eligible workers to assign to a service order, see the Setting Up and Performing Task Assignment Searches chapter.

The next sections detail how work schedules are recorded on your workers' resource calendars and describe how holidays can be inserted in the resource calendars.

Defining Work Schedules on the Resource Calendar

Tasks on a worker's calendar can be manually entered by a user or automatically scheduled by system events. A task can be associated with a task type, which defines the category of task. The task type definition determines whether the user can enter or modify a task of a specific type on a daily calendar. Some of the task types, such as task types for holidays and service orders, can only be assigned, modified, or deleted by the system. As packaged, the system includes the following task types.

- Appointment
- Corporate Event
- Demonstration
- Do not contact this person
- Education-College/Univ
- E-Mail

- Fax
- Follow-up
- Company Holiday
- Planned Leave
- Postal Mail
- Meeting
- Note
- Personal Time Off
- Phone Call
- Research
- Response to Marketing Campaign
- Service Order
- Corporate Training
- Vacation
- Web Conference

The next sections document the pages used to define task types and view and manually update scheduled tasks on a worker's calendar.

Task Types Page

Usage	<p>Use the Task Types page to define the various categories of tasks that can display on your workers' monthly and daily calendars.</p> <p>The Monthly Calendar and Daily Calendar pages are documented later in this chapter.</p>
Object Name	RF_TASK_TYPE
Navigation	<ul style="list-style-type: none"> • Define Business Rules, Define General Options, Use R-Z, Tasks Types • Click the gray task bar for a worker on the dispatch board. <p>For more information about the dispatch board, see Working With the Dispatch Board in the <i>PeopleSoft CRM FieldService PeopleBook</i>.</p>
Access Requirements	Enter a task type.

Task Types

Task Type: VACATION

Resource Calendar Types

*Description: Vacation ☒ Allow Calendar Update

Comments: Vacation

Task Types page

The system displays the **Task Type** you entered to access the page.

Resource Calendar Types

Under **Resource Calendar Types**, you can enter a description of the task type category and specify whether the task type can be selected by a user on the Daily Calendar page.

Description	A description of the Task Type category code. When you define a new task type, you can enter a description using up to 30 alphanumeric characters.
Allow Calendar Update	Indicates whether users will be able to select this category for entries they add on the Daily Calendar page. This option is selected by default. If you clear the check box, users will not be able to add or delete tasks of this type on their daily schedules.
Comments	Notes about how the task type is used in your company's business processes.

Monthly Calendar Page

Usage	Use the Monthly Calendar page to view and update tasks and events recorded on a worker's calendar.
Object Name	RF_SCHED_MONTH
Navigation	Manage Workforce, Maintain Calendar, Use, Monthly Calendar
Access Requirements	Enter the person ID of the worker whose calendar you want to review or update.

Monthly Calendar

Jane Markowitz

Person ID: 3012

⏮

⏪

May

▼

2001

Current Month

⏩

⏭

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	1	2	3	4	5
6	7 8:00a Staff Meeting 1:00p Repair Air Conditioner 3:00p AC Refresher Course	8 9:00a AC Refresher Course	9	10 8:00a Air Conditioner Maintenance	11 8:00a Air Conditioner Maintenance	12
13	14 8:00a Staff Meeting	15	16 2:15p Dr Ross	17	18	19
20	21 8:00a Staff Meeting	22	23 8:00a Compressor Replacement 8:00a Air Conditioner Maintenance	24 8:00a Air Conditioner Maintenance	25	26
27	28 8:00a Memorial Day	29 8:00a Vacation! Hawaii	30 8:00a Hawaii	31 8:00a Hawaii	1	2

Monthly Calendar page

The system displays the name and **Person ID** of the worker you entered to access the page and the worker's monthly calendar.

The arrow buttons enable you to navigate through the calendar dates:



Click this button to move to the previous year.



Click this button to move to the previous month.



Click this button to move to the next month.



Click this button to move to the next year.

You can also select a month from the drop-down list box and enter a specific year. You can click the **Current Month** link to return to the calendar for the current month after navigating to other months or years. The system highlights the current day and displays non-work days in light gray.

For each day of the month, the system displays previously scheduled tasks in order of their start times. Start times are for the time zone associated with the worker on the Work page of the Worker component. Next to the task time, the system displays the description of the task, if available.

For more information about the Worker component, see the Managing Workers chapter.

Click a scheduled task or date number link to access the worker's Daily Calendar page, where you can add, modify, or view details for scheduled tasks. The Daily Calendar page is documented in the next section.

Daily Calendar Page

Usage	Use the Daily Calendar page to view and update a person's task list for a particular day.
Object Name	RF_SCHED_TASK1
Navigation	<ul style="list-style-type: none"> • Manage Workforce, Manage Workforce, Use, Daily Calendar • From the Monthly Calendar page, you can click a scheduled task or a date number link to access the Daily Calendar page.
Access Requirements	When accessing the page from the menu, enter a Person ID of the worker and the date of the daily calendar that you want to review or update.

Daily Calendar

Monday

05/07/2001

Jane Markowitz

Person ID: 3012

First 1 1-3 of 3 Last

Start Time	End Time	Description	Task Type	Service Order	Last Modified	Last Maintained By	
8:00AM	10:00AM PDT	Staff Meeting	Meeting		04/28/2001 11:36AM	JMARKOWITZ	+ -
1:00PM	2:00PM PDT	Repair Air Conditioner	Service Order	0000000368	05/04/2001 4:36PM	BJONES	+ -
3:00PM	6:00PM PDT	JAC Refresher Course	Corporate Training		05/03/2001 12:00AM	JMARKOWITZ	+ -

Monthly Calendar

[Monthly Calendar](#)

Daily Calendar page

The system displays the name and **Person ID** of the worker together with the day and date of the daily calendar task list that you have accessed.

Start Time The scheduled start time of the task.

End Time The scheduled end time of the task.

Note. The time zone of the start and end times reflects the location associated with workers on the Work page of the Worker component. **For more information** about the Worker component, see the Managing Workers chapter.

Description A description of the **Task**. When you enter a new task, you can enter a description of the task using up to 254 alphanumeric characters.

Note. When a service order is assigned to a worker, a task representing the service order assignment is added to the worker's calendar. For service order tasks, the description shown on the calendar is the description of the service activity, if available. If no description of the service activity is available, the system displays the service description on the calendar. Also, if there are multiple activities on the service order assigned to the worker for the same time, the system displays a task for each activity. These tasks will have the same start and end times.

Task Type

The type of task. Task types define the category of a task and can be used to create reports specific to your business processes. Task types must first be defined on the Task Types page, which is documented earlier in this chapter. The task type definition determines whether the user can enter or modify a task of a specific type on a daily calendar. Some of the task types can only be assigned, modified, or deleted by the system.

For more information about the task types delivered with the system, see *Defining Work Schedules on the Resource Calendar*.

Service Order

Indicates the identification of the assigned service order. This column appears on the calendars of provider group members. Click the link to access the service order on the Service Order page. **For more information** about service order assignment, see *Creating and Managing Service Orders in the PeopleSoft CRM FieldService PeopleBook*.

Opportunity Name

Indicates the name of the assigned opportunity. This column only appears on the calendars of sales staff. Click the link to access the opportunity information on the Opportunity Detail page.

For more information about the Opportunity Detail page, see *Managing Opportunities in the PeopleSoft CRM Sales PeopleBook*.

Lead Name

Indicates the name of the assigned sales lead. This column only appears on the calendars of sales staff. Click the link to access the lead information on the Sales Lead Details page.

For more information about the Sales Lead Details page, see *Managing Leads in the PeopleSoft CRM Sales PeopleBook*.

Last Modified

The date and time that the calendar entry was last modified.

Last Maintained By

The user ID of the person who last updated the calendar entry.

Defining Holidays Schedules

In PeopleSoft CRM, you can define holiday schedules for your workforce and schedule a process to update the calendars of your workers to reflect the holiday information. A holiday is a type of task. In PeopleSoft CRM FieldService, the system will not consider a worker eligible for service order assignment if the period defined by the required start and end dates on a service order coincide with a holiday on the worker's calendar. However, workers can always be manually assigned to a service order, regardless of the availability reflected on their calendars.

For more information about generating a list of eligible workers to assign to a service order, see the Setting Up and Performing Task Assignment Searches chapter.

To display holidays on worker calendars:

1. Define standard workweek information with the Installation component.

Define standard workweek information for your installation on the Calendar Options page of the Installation component. The PeopleSoft CRM system uses standard workweek information to determine the start and end time of holidays. The start and end times set for the installation are displayed on worker calendars as the start and end times of the holiday.

2. Define holidays on the Holiday Schedule page.

You can define multiple holiday schedules to reflect different schedules for various segments of your workforce.

3. Associate workers with the appropriate holiday schedule on the Work page of the Worker component.

When a holiday schedule is selected for a worker, the system updates the worker's calendar to reflect the selected holiday schedule when the Worker component is saved. Note that if no holiday schedule is selected for a worker, no holidays will be reflected on the worker's calendar.

Note. If you change a worker's holiday schedule on the Work page, when the page is saved the system deletes all existing holidays on the worker's calendar and records the holidays of the new schedule starting from the beginning of the calendar year.

For more information about the Worker component, see the Managing Workers chapter.

4. Run the Load Holiday process using the Load Holiday page to update existing holiday schedules.

We recommend that you maintain one holiday schedule per region or per segment of your workforce and periodically add new dates to each holiday schedule to reflect the official

holidays of the next year. When you add additional dates to the holiday schedules you define with the Holiday Schedule page, you must run the Load Holiday process.

For example, you may define the holidays for the next year in the last quarter of the current year. After defining the holiday dates for the coming year, you run the Load Holiday process so that the new dates are recorded on the calendars of your workforce.

Note. When you run the Load Holiday process, the system updates workers' calendars to reflect the changes in the associated holiday schedule from the current date forward. If a holiday for a date prior to the current date is deleted from the schedule, the system does not delete the past holiday from the workers' calendars. However, if a holiday for a future date is deleted from or added to the holiday schedule, the system updates the workers' calendars to reflect the holiday schedule changes.

Holiday Schedule Page

Usage	Use the Holiday Schedule page to define a group of holidays. You can define multiple holiday schedules, if necessary. You can associate a holiday schedule with each of your workers on the Work page of the Worker component. To update worker calendars with a specific holiday schedule, run the Holiday Load process using the Load Holiday page, which is document later in this chapter. For more information about the Worker component, see the Managing Workers chapter.
Object Name	HOLIDAY_SCHED_TBL
Navigation	Define Business Rules, Define General Options, Use E-Q, Holiday Schedule
Access Requirements	Enter a holiday schedule.

Holiday Schedule

Holiday Schedule: 2001

Schedule Information

Description: Year 2001

Short Description: Year 2001

Holiday Details Find First 1-8 of 8 Last

Holiday	Description		
01/01/2001	New Years Day	+	-
02/19/2001	Washington's Birthday	+	-
05/28/2001	Memorial Day	+	-
07/04/2001	Independence Day	+	-
09/03/2001	Labor Day	+	-
10/08/2001	Columbus Day	+	-
11/22/2001	Thanksgiving	+	-
12/25/2001	12/25/2001	+	-

Holiday Schedule page

The system displays the **Holiday Schedule** you entered to access the page.

The **Schedule Information** group box displays the **Description** and **Short Description** of the holiday schedule and the **Holiday Details** grid, which lists the date of each **Holiday** included in the schedule together with a **Description** of the holiday. When you add a new date to the list of holidays, you can enter a description using up to 30 alphanumeric characters. This description will be displayed on the workers' calendars.

Load Holiday Page

Usage	Use the Load Holiday page to establish run control parameters for the Holiday Load process. The Holiday Load process updates worker calendars with the specified holiday schedules. Holiday schedules must first be defined on the Holiday Schedule page, which is documented in the previous section.
Object Name	RUN_CNTL_RF1000
Navigation	Manage Workforce, Maintain Calendar, Process, Holiday Load
Access Requirements	Enter a run control ID.

Holiday Load page

The system displays the **Run Control ID** you entered to access the page, together with the associated **Language**.

The **Report Manager** link takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list). The **Process Monitor** link takes you to the Process List page, where you can view the status of submitted process requests. The **Run** button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler in the *PeopleTools PeopleBook*.

The **Load Criteria** group box indicates the parameters for the Holiday Load process.

One Worker

Select this option to load the holiday schedule for the worker you specify in the **Name** field. A holiday schedule must first be associated with the worker on the Work page of the Worker component.

For more information about the Worker component, see the Managing Workers chapter.

All Workers/One Schedule

Select this option to load the holiday schedule you specify in the **Holiday Schedule** field for all workers currently defined in your system who have the specified holiday schedule.

All Workers/All Schedules

Select this option to load the holiday schedule associated with each worker in your system. A holiday schedule must first be associated with each worker on the Work page of the Worker component.

CHAPTER 14

Setting Up and Performing Task Assignment Searches

In PeopleSoft CRM, you can perform task assignment searches to find the members of your workforce who are best suited for assignment to a case in PeopleSoft CRM Support or PeopleSoft CRM HelpDesk or to a service order in PeopleSoft CRM FieldService. When you click a button on the case or a link on the service order, the system returns a list of eligible candidates within the specified provider group who are ranked by their fit score—an evaluation of how well each candidate matched criteria on the case or service order and the competencies on the service or service activity. The candidate with the highest fit score is the candidate who is best suited for assignment to the task. You may choose any candidate on the list, regardless of the fit score and you may also manually select someone who does not show up on the candidate list.

Note. In PeopleSoft CRM Support, the phrase "task assignment searches" refers to finding an agent to assign to a case; it does *not* refer to assigning tasks in call center business projects.

Understanding Task Assignment Searches From Cases and Service Orders

To evaluate which members of your workforce are best suited for a particular task, the task assignment engine compares information defined for the worker with information defined for the service order or case to generate a list of candidates. The next sections detail the type of information the task assignment engine uses to generate a list on names of the candidate list.

Provider Group

On both cases and service orders, you must enter a provider group before performing a task assignment search. The task assignment engine only evaluates the workers associated with the provider group. If necessary, you can also search for an appropriate provider group for the service order or support case.

For more information about provider groups, see Setting Up and Maintaining Provider Groups and Group Members chapter. **For more information** about provider group searches, see Understanding Provider Group Searches from Cases and Service Orders in this chapter.

Availability

During case and service order assignment searches, the system determines whether a worker is available for assignment by checking the worker's resource calendar. If the required start and end dates on a service order or the current date and time on a case correspond to a period during the worker's standard work hours for which no other task has been assigned, the worker is considered available for task assignment. Standard workweek and workday hours are established at installation on the Calendar Options page. If necessary, the standard workweek and workday hours can be modified for individual workers on the Adjust Schedule page.

For more information about defining standard work hours for your workforce, see Setting Up the Task Assignment Engine in this chapter. **For more information** about resource calendars for your workforce, see the Using Resource Calendars chapter.

Task Assignment Criteria

For a worker, you can define values for customer, site, region, location, product group, and product on the Assignment Criteria page. These values defined for the worker can be matched to values entered on or derived from the service order or case. The relative importance of each assignment criteria match as defined on the Assignment Weighting Factors page determines a worker's fit score. Failure to match an assignment criteria value on a case or service order does not exclude a worker from the list of eligible assignment candidates. Instead, a match failure lowers the worker's fit score for the assignment compared to other workers who do match the criteria value. A worker must match at least one criteria value to be included in the candidate list for the service order or case.

The task assignment engine uses a different set of assignment criteria values depending on whether you are searching for candidates for a case in PeopleSoft CRM HelpDesk, a case in PeopleSoft CRM Support, or a service order in PeopleSoft CRM FieldService. For helpdesk cases, the task assignment engine matches values for location, product, and product group. For support cases, the task assignment engine matches values for customer, site, region, product, and product group. For service orders, the task assignment engine matches values for customer, site, region, product group, and product.

Competency

For service order assignment searches only, the task assignment engine can also match the competency proficiency of the worker with the minimum competency proficiency requirements on the service. Any worker in the provider group who does not meet or exceed the minimum competency proficiency defined for the service or service activity on the service order will not have a match for this competency. However, as with other criteria, failure to meet the competency requirements does not exclude a worker from the candidate list; it simply lowers the worker's fit score. The higher the proficiency for the worker, the higher the worker's fit score.

The competency data used by the task assignment engine depends on two factors: 1) whether competency data has been defined for a service or the service activity, and 2) whether the task assignment search is initiated from the service order default line attributes or the service order line.

If activities have been defined for the service, the task assignment engine uses only the competency requirements defined for the activities. If the task assignment search is performed from the service order default line attributes for a service with one or more activities, the system evaluates worker competency against the competency requirements defined for all activities associated with the service. If the task assignment search is performed from the service order line, only the competency requirements of the activity on the line are considered.

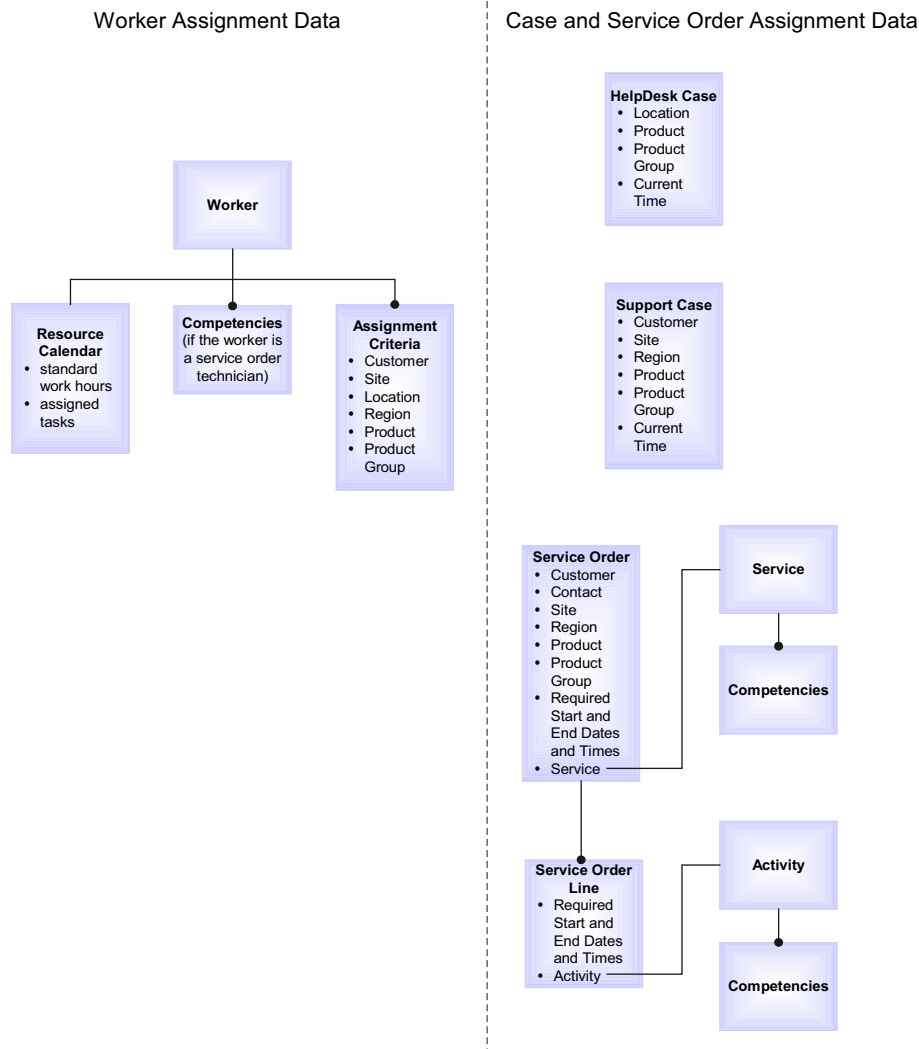
If no activities are defined for the service, the task assignment engine uses the competency information defined for the service.

If no competencies have been defined for the service, the task assignment engine does not perform a competency match. In this case, only worker availability and assignment criteria matches are used to evaluate candidates for service order assignment.

For more information about defining competency requirements for services and service activities, see Setting Up Your Services in the *PeopleSoft CRM FieldService PeopleBook*.

Task Assignment Search Data Model

The following diagram illustrates the information the task assignment engine uses to generate a list of candidates to assign to tasks on a helpdesk case, support case, or service order.



Data Model for Task Assignment Criteria Matches

Understanding Candidate Selection and Fit Score Calculations

The task assignment engine builds a table representing each criteria match between the workers in a provider group and the values on a service order or case. Next, the task assignment engine removes the unavailable candidates and calculates the aggregate fit score for each of the remaining workers in the table. The workers are then displayed on a candidate list sequenced by their aggregate fit score in ascending order. The next sections detail the candidate selection process and the equations for fit score calculation.

Selecting Candidates

For each task assignment criteria match between a worker and the assignment criteria evaluated for the help desk case, support case, or service order, the system inserts a row into

the Criteria Fit table, RF_ASGN_FIT (a temporary table). Each row includes the name of the worker, the criteria that was matched, and the relative importance, or weight, of the match. The weight value for the match becomes the number of points assigned to the match. For competency matches, the number of points depends on how many competencies the worker matched and at what proficiency. For this reason, the number of competency points may be less than the competency weight.

Next, the system reviews the resource calendar for each worker included in the Criteria Fit table and deletes the rows for any worker who is unavailable for assignment. For service orders, workers are unavailable if 1) the worker's calendar includes another task scheduled for either the required start date and time or the required end date and time on the service order or service order line or 2) the required start and end times on the service order or service order line fall outside of the standard work hours defined for the worker. For cases, a worker is unavailable if the worker's calendar reflects a task scheduled for the current date and time.

Calculating Candidate Fit Scores

For each worker who remains in the Criteria Fit table, the system sums the weight value associated with each criteria match row and calculates the fit score for the worker using the following equation:

$$\text{Worker's Fit Score} = \frac{\text{Total number of match points for the worker}}{\text{Number of possible match points for the case or service order}} \times 100$$

where the number of possible match points is defined by the criteria weight factor.

For example, suppose Jon Smith matched three assignment criteria—product, customer, and site—on a service order for which no competency requirements were defined. In your system, the assignment weighting factor for each assignment match that applies to service orders is as follows:

Customer = 5, Region = 4, Product = 3, Site = 0, Competencies = 4.

The total number of possible match points in your system is the total of the weight values that apply to service orders: $5 + 4 + 3 + 0 + 4 = 16$. For the service order in this example, Jon Smith matched product, customer, and site. His total number of match points is calculated as follows:

$$3 + 5 + 0 = 8.$$

$$\text{Jon's Fit Score} = \frac{8}{16} \times 100 = 50\%.$$

Accounting For Competency Proficiency

When calculating fit scores for service orders assignments, the task assignment engine accounts for the worker's competency proficiency and the relative importance of the competency defined for the service or service activity using the following equation:

$$\text{Competency Score} = \frac{(C1Wt \times C1WP) + (C2Wt \times C2WP) + \dots (CnWt \times CnWP)}{(C1Wt \times C1MP) + (C2Wt \times C2MP) + \dots (CnWt \times CnMP)},$$

where $CnWt$ is the weight, or relative importance, of the competency defined for the service or service activity, $CnWP$ is worker's proficiency rating for the competency, and $CnMP$ is the maximum proficiency rating defined for the competency.

For example, suppose the service order in the previous example was for an Air Conditioner Maintenance service with no activities. The Air Conditioner Maintenance service has two competency requirements: a Basic Maintenance competency and a Compressor Replacement competency. The Basic Maintenance competency requires a minimum proficiency of 2 on a 1-to-6 rating scale, where 6 is the maximum proficiency rating. The Compressor Replacement competency requires a minimum proficiency of 3 on the same rating scale. The service definition for Air Conditioner Maintenance weights the relative importance of the Basic Maintenance competency for performing the service as a 5 on a 0 to 5 scale, while the relative importance of the Compressor Replacement competency is weighted at 2 on the same scale. The next table summarizes the competency data for the Air Conditioner Maintenance service:

Competency	Minimum Proficiency	Relative Importance to the Service (CnWt)	Maximum Proficiency on Rating Model (CnMP)
Basic Maintenance (C1)	2	5	6
Compressor Replacement (C2)	3	2	6

The next table shows the competency proficiency rating for three technicians, Jon Smith, Bill Jones, Jane Markowitz:

Worker	Basic Maintenance Competency Proficiency (C1WP)	Compressor Replacement Competency Proficiency (C2WP)
Jon Smith	4	3
Bill Jones	2	0
Jane Markowitz	5	4

The competency score for each technician is calculated as follows:

$$\text{Jon Smith's Competency Score} = \frac{(5 \times 4) + (2 \times 3)}{(5 \times 6) + (2 \times 6)} = \frac{(20 + 6)}{(30 + 12)} = \frac{26}{42} = 0.62$$

$$\text{Bill Jones's Competency Score} = \frac{(5 \times 2)}{(5 \times 6) + (2 \times 6)} = \frac{10}{(30 + 12)} = \frac{10}{42} = 0.24$$

Notice that Bill Jones did not match the proficiency requirements for the Compressor Replacement competency so no points for the match were included in the calculation.

$$\text{Jane Markowitz's Competency Score} = \frac{(5 \times 5) + (2 \times 4)}{(5 \times 6) + (2 \times 6)} = \frac{(25 + 8)}{(30 + 12)} = \frac{33}{42} = 0.79$$

To calculate the fit score for each worker, the competency score is multiplied by the assignment weighting factor defined for competency criteria matches in your installation. Let's assume the same criteria weight factors as in the previous fit score calculation example:

Customer = 5, Region = 4, Product = 3, Site = 0, Competencies = 4.

Let's also assume that, except for competencies and competency proficiency, Jon, Bill, and Jane matched on identical criteria. Their fit scores are calculated as follows:

$$\text{Jon Smith's Fit Score} = \frac{3 + 5 + 0 + (4 \times 0.62)}{5 + 4 + 3 + 0 + 4} = \frac{8 + 2.48}{16} = \frac{10.48}{16} = 0.655$$

$$\text{Bill Jones's Fit Score} = \frac{3 + 5 + 0 + (4 \times 0.24)}{5 + 4 + 3 + 0 + 4} = \frac{8 + 0.96}{16} = \frac{9.16}{16} = 0.56$$

$$\text{Jane Markowitz's Fit Score} = \frac{3 + 5 + 0 + (4 \times 0.79)}{5 + 4 + 3 + 0 + 4} = \frac{8 + 3.16}{16} = \frac{11.16}{16} = 0.697$$

The task assignment engine would return these candidates on a candidate list sorted as follows:

- Jane Markowitz, 70%
- Jon Smith, 66%
- Bill Jones, 56%

If you drill down on Jon Smith's fit score, the system displays the criteria matches that compose his fit score:

Criteria	Competency	Score
Product		3/16 = 18.8%
Customer		5/16 = 31.3%
Site		0/16 = 0%
Competencies	Basic Maintenance	$(4 \times (5 \times 4) / 42) / 16 = 11.90\%$
Competencies	Compressor Replacement	$(4 \times (2 \times 3) / 42) / 16 = 3.6\%$

Understanding Provider Group Searches from Cases and Service Orders

From the service order in PeopleSoft CRM Field Service and the case in PeopleSoft CRM Support, you can click a link or button to have the system suggest provider groups to assign to the service order or case. The list of suggested provider groups represents the provider groups associated with the region derived from customer information on the service order or case.

For service orders and cases in PeopleSoft CRM FieldService and PeopleSoft CRM Support, the system checks first for the region associated with the customer's site. If no site is defined or the information is not available, the system checks for the region associated with the

contact's primary address. If this information is not available, the system uses the regions associated with the customer.

Note. If no region information is available for the customer, no region can be associated with the service order, and the system will be unable to suggest a provider group.

For more information about defining customer information, including sites, contacts, and addresses, see the Managing Customer Information chapter. **For more information** about defining worker location, see the Managing Workers chapter. **For more information** about provider group definition, see Setting Up and Maintaining Provider Groups and Group Members.

Provider Group List Page

Usage	Use the Provider Group List page to select from a subset of provider groups that are associated with the region derived from information entered on the Service Order page or Support Case page. For more information about how the system derives region for the service order, see Understanding Provider Group Searches from Cases and Service Orders in this chapter
Object Name	RF_SO_PG_SEC
Navigation	<ul style="list-style-type: none"> From the Service Order page in PeopleSoft CRM FieldService, click one of the Suggest Group links. From the Case page in PeopleSoft CRM Support or PeopleSoft CRM HelpDesk, click the Suggest a Provider Group button.
Prerequisites	The region derived from service order or case must match region of an active provider group.

Provider Group List	
Select	Provider Group Name
<input type="checkbox"/>	Appliances Eastern
<input type="checkbox"/>	Appliances Western

OK Cancel

Provider Group List

The grid lists the provider groups that are associated with the region derived from the service order or case.

Select Indicate the provider group you want to assign by selecting the appropriate check box in this column and clicking the **OK** button. You can only select one provider group.

Provider Group Name The name of the provider group.

Setting Up the Task Assignment Engine

The task assignment engine uses information defined in your system to generate a list of candidates to assign to a case or service order.

To set up the task assignment engine:
--

1. Define the workers in your system.

Your workforce may include employees, contractors, or consultants, but each worker must be defined in your system either by synchronizing with another system using the Person Basic EIP and the Workforce EIP, or by manually entering worker data on the pages of the Manage Workforce component.

For more information about worker definitions, see the Managing Workers chapter.

2. Define a standard workweek.

Workers are considered available for task assignment on the days defined by their standard workweek between the hours that define their standard workday. Define standard workweek information for your installation on the Calendar Options page of the Installation component. If necessary, define standard workweek information for a specific worker on the Adjust Schedule page.

Note. You are not required to define standard workweek information for your installation or individual workers. However, the system requires this information to automatically create entries on a worker's calendars when a service order is assigned to the worker.

3. Define assignment-weighting factors for assignment criteria matches.

On the Assignment Weighting Factors page, you define the relative importance of task assignment criteria. When calculating the fit score of each worker, the system accounts for the weight assigned to each of the criteria value that a worker matched on the service order or case.

For more information about how fit scores are calculated, see Understanding Candidate Selection and Fit Score Calculations in this chapter.

4. Assign Match Criteria to Workers

On the Assignment Criteria page, you define the criteria that the task assignment engine will use to match a worker to a case or service order. The system uses calculates the fits score of the worker based on the number of criteria the worker matched on the case or

service order and the weight assigned to the criteria.

5. Assign workers to provider groups.

Before you can perform a task assignment search from a case or service order, you must specify an active provider group. The task assignment engine only evaluates the workers associated with the provider group.

For more information about provider group definition, see Setting Up and Maintaining Provider Groups and Group Members.

6. Define competency information (optional)

Competency information is only required if you want the task assignment engine to consider the skills of a technician when selecting workers for assignment to a service order. You define the competency proficiency of each worker and the minimum proficiency required for each service or service activity. When the service or service activity is listed on a service order, the task assignment engine will suggest candidates that meet or exceed the minimum proficiency requirements for the competencies associated with the service or service activity. Failure to meet a competency requirement does not exclude a worker from the list of candidates; it simply lowers the worker's fit score.

For more information about defining competency information for workers in you system, see the Managing Workforce Competencies chapter. **For more information** about defining competency information for services and service activities, see Setting Up Your Services in the *PeopleSoft CRM FieldService PeopleBook*.

Calendar Options Page

Usage	<p>Use the Calendar Options page to define the standard workday and standard workweek for your enterprise at the time of installation. The PeopleSoft CRM system uses standard workweek information to determine the start and end time of holidays and to determine worker availability for task assignments. If necessary, you can define standard workdays and workweeks for individuals on the Adjust Schedule page, which is documented later in this chapter. The system uses the standard workweek information defined on this page only if no workweek information has been defined for a worker.</p> <p>Note. You are not required to define standard workweek information for your installation or individual workers. However, the system requires this information to automatically create entries on a worker's calendars when a service order is assigned to the worker.</p> <p>For more information task assignment searches, see Understanding Task Assignment Searches from Cases and Service Orders in this chapter. For more information about holiday definition, see the Using Resource Calendars chapter.</p>
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Object Name	RF_INSTALLATION
Navigation	Define Business Rules, Define General Options, Use E-Q, Installation
Access Requirements	Click the Calendar Options tab.

The screenshot shows the 'Calendar Options' tab selected. Under the 'Scheduling Options' header, there is a 'Default Work Days' section with checkboxes for Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. Monday through Friday are checked. Below this, the 'Start Time' is set to 8:00AM PDT and the 'End Time' is set to 5:00PM PDT.

Calendar Option page

The fields under **Scheduling Options** define the **Default Work Days** for your enterprise. The **Start Time** and **End Time** field define the default hours of operation for your working days.

Note. You are not required to define standard workweek information for your installation or individual workers. However, the system requires this information to automatically create entries on a worker's calendars when a service order is assigned to the worker.

Adjust Schedule Page

Usage	<p>Use the Adjust Schedule page to define the default workdays for a specific person. Standard workweek information is used to evaluate worker availability for task assignment. When evaluating worker availability for task assignment, the system checks the standard workweek information defined for the worker on this page. If no information is defined for the specific worker, the system checks the standard workweek information defined for the installation on the Calendar Option page, which is documented earlier in this chapter.</p> <p>For more information task assignment searches, see Understanding Task Assignment Searches from Cases and Service Orders in this chapter. For more information about holiday definition, see the Using Resource Calendars chapter.</p>
Object Name	RF_PERSON_CAL_OPT
Navigation	Manage Workforce, Maintain Calendar, Use, Adjust Schedule
Access Requirements	Enter a person ID.

Adjust Schedule

Teresa Pine

Person ID: 588

Scheduling Options

Default Work Days

☒ Monday
☒ Tuesday
☒ Wednesday
☒ Thursday
☒ Friday
☐ Saturday
☐ Sunday

Start Time: 8:00AM PDT

End Time: 5:30PM PDT

Adjust Schedule page

The system displays the name and **Person ID** that you entered to access the page.

The fields under **Scheduling Options** define the **Default Work Days** for the specified person. The **Start Time** and **End Time** field define the default hours of operation for the person. By default, the system populates these values with the standard workweek information defined for the installation on the Calendar Options page, which is documented earlier in this chapter.

Assignment Weighting Factors Page

Usage	<p>Use the Assignment Weighting Factors page to establish the relative importance of assignment criteria matches for customer, region, product, product group, location, and competency values during task assignment searches. When calculating a worker's fit score for criteria matches on a service order or case, the task assignment engine accounts for the relative weight of each match using the weight factors established on this page.</p> <p>For more information about how fit scores are calculated for assignment criteria matches on a service order or case, see Understanding Candidate Selection and Fit Score Calculations in this chapter.</p>
Object Name	RF_ASSIGNMENT_WGHT
Navigation	Define Business Rules, Define General Options, Use A-D, Assignment Weighting Factors
Access Requirements	Enter a setID.

Assignment Weighting Factors

SetID: CRM01

Importance

	N / A	Least Important		Most Important			
	0	1	2	3	4	5	
<input type="radio"/> <input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Customer
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Region
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Product
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Product Group
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Site
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Competencies
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Location

Assignment Weighting Factors page

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

The grid displays the relative importance of a worker's assignment criteria matches for **Customer**, **Region**, **Product**, **Product Group**, **Site** (for customers) **Location** (for internal employees), and **Competencies** (for service orders only) on a service order or case.

On the Assignment Criteria page, you can associate specific customers, regions, products, and so forth with a specific person. When you perform a task assignment search from a case or service order, the task assignment engine accounts for the relative weight of each criteria match when calculating a worker's fit score—an evaluation of how well suited the worker is for assignment to the service order or case.

Assignment Criteria Page

Usage	<p>Use the Assignment Criteria page to define the criteria that the task assignment engine will use to match a worker to a case or service order. When you perform a task assignment search from a case or service order, the task assignment engine displays a ranked list of available candidates from the specified provider group who matched at least one of the criteria values on the service order or case.</p> <p>For more information about task assignment searches, see Understanding Task Assignment Searches from Cases and Service Orders in this chapter.</p>
Object Name	RF_PERSON_CRIT
Navigation	Manage Workforce, Manage Competencies, Use, Adjust Criteria
Access Requirements	Enter a person ID.

Assign Criteria				
Jon Smith		Person ID: 3010		
Find First 1-2 of 2 Last				
Criteria Code	SetID	Criteria Value	Site	
Customer	CRM01	Lakeview Community College	Fargo	+ -
Product	CRM01	6000 BTU Room Air (Grey)		+ -

Assignment Criteria page

The system displays the name and the **Person ID**.

The fields in the grid indicate the values on a service order or case that the system uses to evaluate how suitable a worker is for assignment to the service order or case relative to other worker in the provider group. Failure to match a criteria does not exclude the worker for the list of suggested candidates; it simply lowers the worker's fit score.

Criteria Code

The category of assignment criteria: **Customer**, **Product**, **Region**, **Product**, **Product Group**, or **Location**.

The task assignment engine uses a different set of assignment criteria values depending on whether you are searching for candidates for a case in PeopleSoft CRM HelpDesk, a case in PeopleSoft CRM Support, or a service order in PeopleSoft CRM FieldService. For helpdesk cases, the task assignment engine matches values for location, product, and product group. For support cases, the task assignment engine matches values for customer, site, region, product, and product group. For service orders, the task assignment engine matches values for customer, site, region, product group, and product.

SetID

The appropriate setID for the following Criteria Code values: **Customer**, **Product**, **Product**, **Product Group**, or **Location**. No setID is required for **Region**.

Criteria Value

The specific value on a service order or case that corresponds to the selected **Criteria Code**. The available prompt values for this field depends on your **Criteria Code** selection.

Site

The site for a specific customer. If none is entered, the person will support the customer at any site.

Performing Task Assignment Searches from a Case or Service Order

To perform a task assignment search from a case or service order, you enter a provider group and click the Suggest An Agent button on the case or the Suggest Technician link in the service order default line attributes section or on the service order line. On the Candidate List page, the task assignment engine system returns a list of eligible candidates from the provider group who are ranked by their fit score—an evaluation of how well each candidate matched

criteria on the case or service order. The candidate with the highest fit score is the candidate who is best suited for assignment to the task. To see the assignment matches that the task assignment engine used to calculate the candidate's fit score, you click the fit score link to access the Assignment Drillback page.

The next sections document the fields on the Candidate List page and the Assignment Drillback page.

Candidate List Page

Usage	<p>Use the Candidate List page to select from a ranked list of workers that can be assigned to a service order line or a case. Candidates are ranked by their fit score—an evaluation of how well each candidate matched criteria on the case or service order.</p> <p>For more information about how fit scores are calculated for assignment criteria matches on a service order or case, see Understanding Candidate Selection and Fit Score Calculations in this chapter.</p>
Object Name	RF_ASSIGN_LIST_SEC
Navigation	<ul style="list-style-type: none"> From the Service Order page in PeopleSoft CRM FieldService, click one of the Suggest Technician links. From the Case page in PeopleSoft CRM Support or PeopleSoft CRM HelpDesk, click the Suggest an Agent button.
Access Requirements	Enter an active provider group on the case or service order.

Candidate List

Select	Name	Score
<input type="checkbox"/>	Jane Markowitz	70%
<input type="checkbox"/>	Jon Smith	65%
<input type="checkbox"/>	Bill Jones	56%

Candidate List page

The grid lists the workers in the provider group who matched at least one assignment criteria value on the case or service order.

Select

Indicate a worker you want to assign by selecting the appropriate check box in this column and clicking the **OK** button. If the assignment is for a service order line, then more than one worker may be selected.

Name

The name of the eligible worker.

Score

The fit score of the worker, which indicates how well suited for assignment to the case or service order line the worker is relative to other candidates. Click the fit score link to access the Assignment Drillback page, where you can view the assignment weight factors the system used to calculate the fit score. The Assignment Drill back page is documented later in this chapter.

Select one or more check boxes to indicate the workers you want to assign and click **OK** to return to the Service Order or Case page; click **Cancel** to return to the Service Order page or Case page without making an assignment.

Assignment Drillback Page

Usage	Use the Assignment Drillback page to view the assignment matches and associated scores for each match that composes a candidates aggregate fit score on the Candidate List page. For more information about how fit scores are calculated for assignment criteria matches on a service order or case, see Understanding Candidate Selection and Fit Score Calculations in this chapter.
Object Name	RF_ASSIGN_DB_SEC
Navigation	Click the fit Score link on the Candidate List page, which is documented in the previous section.

Assignment Drillback

Jon Smith

Find | View All First 1-4 of 4 Last

Criteria Code	Description	Activity	Score
Customer			31.3%
Product			18.8%
Competencies	Basic Maintenance		11.9%
Competencies	Compressor Replacement		3.6%

OK Cancel

Assignment Drillback page

The grid lists each criteria code the system used to evaluate the candidate together with the worker's score for each criteria match based on the criteria' assignment weight factor.

Name

The name of the candidate selected for case or service order assignment.

Criteria Code

The criteria code on the case or service order that the candidate matched. Values for each criteria code are associated with workers on the Assign Criteria page.

	<p>For more information about the Assigned Criteria page, see Setting Up the Task Assignment Engine in this chapter.</p>
Score	<p>The worker's score for each criteria match based on the criteria's assignment weight factor for the criteria code established on the Assignment Weighting Factors page.</p> <p>For more information about the Assignment Weighting Factors page, see Setting Up the Task Assignment Engine in this chapter.</p>
Description	<p>The description of the competency. This value only displays for competency criteria codes.</p>
Activity	<p>The activity from the service order line. Because a competency may be required for more than one activity, this column indicates which activity the competency applies to.</p>

Click **OK** or **Cancel** to return to the Candidate List page.

CHAPTER 15

Managing Customer Information

PeopleSoft CRM's Maintain Customer component provides tools to manage your customer information with a focus on the relationship that customer has to your company. You can integrate this information with PeopleSoft Supply Chain Management, PeopleSoft Financials, or another external system. With this system, you have the flexibility to add your new customers as required for PeopleSoft CRM's front office processes while letting your back office processes handle defining additional customer attributes such as tracking your customer's receivables and payables balances. The combination of these features provides a collection of information enabling you to track your customer relationships, simplify data entry, and make informed business decisions from your enterprise reports.

Within PeopleSoft CRM's Maintain Customer component you can define the following attributes for customers:

- General Information
- Customer roles
- Customer relationships
- Customer contact information
- Customer interactions
- Bill to, ship to, sold to, correspondence

If your system is integrated with PeopleSoft Supply Chain Management or PeopleSoft Financials, it has these additional features:

- Payment options
- Customer tax exempt certificate and customer VAT information
- Customer credit profile
- Customer notes, attachments, and messages
- Quick customer create
- Customer groups and user-defined fields

EIPs Used by the Customer Component

The system uses the Customer and Contact EIP (enterprise integration point) groups to manage integration between PeopleSoft CRM and other PeopleSoft products or third-party products. When you use the fullsync message, it is important that the Customer_Fullsync EIP be run before the Contact_FullSync EIP.

Name	EIPs Used	Additional Information
Customer Fullsync Inbound	CUSTOMER_FULLSYNC (Both)	This will purge all data from the tables before applying the new data. The purge is performed only if a header message is received.
Contact Fullsync Inbound	CONTACT_FULLSYNC (SCM side only) CONTACT_FULLSYNC_EFF (Both)	When interfacing with PeopleSoft CRM, the effective-dated message must be used due to differences in data models. The CONTACT_FULLSYNC message is used to create the initial message, which is then passed to the effective-date logic to put all future rows in the staging table and send only the current information to PeopleSoft CRM.
Customer Fullsync Outbound	CUSTOMER_FULLSYNC (Both)	Same as inbound.
Contact Fullsync Outbound	CONTACT_FULLSYNC (Both)	When interfacing with SCM from PeopleSoft CRM, the regular message must be used.
Customer Sync Inbound	CUSTOMER_SYNC (Both)	
Contact Sync Inbound	CONTACT_SYNC (SCM side only) CONTACT_SYNC_EFF (Both)	As with Fullsync, the incremental sync message must also only send the 'Current' data into PeopleSoft CRM.
Customer Sync Outbound	CUSTOMER_SYNC (Both)	
Contact Sync Outbound	CONTACT_SYNC (Both)	When interfacing with SCM from PeopleSoft CRM, the regular message must be used.

For more information about customer integration options between PeopleSoft CRM and PeopleSoft Supply Chain Management and Financials applications, see *Defining Integration for PeopleSoft CRM*. **For more information** about EIPs used by the Customer component, see *Using the EIP Catalog in the PeopleSoft Enterprise Integration PeopleBook*. .

Customer Definition Overview

There are several things that you need to set up before you can begin entering customers into your database: supporting tables and automatic numbering for customer and contact IDs.

When you add a customer, the default value for the customer ID is *NEXT*. You can set up the system so that it assigns the next number in sequence as determined by the automatic numbering option that you set up in the Define General Options menu. You can override the incremental assignment of IDs by entering another character combination in its place. You can also assign a customer ID manually by entering the ID in the field.

If you are integrated with PeopleSoft Supply Chain Management or PeopleSoft Financials or any other third-party system, you must define which database assigns the autonumbering for IDs.

For more information about setting up automatic numbering, see Using Automatic Numbering in *PeopleSoft CRM Application Fundamentals*.

If your PeopleSoft CRM system is integrated with PeopleSoft SCM or Financials, you must decide which database will assign the customer IDs and contact IDs. The Customer component in SCM or Financials and the PeopleSoft CRM Customer component use the same ID assignment to ensure solid integration between the two databases and prevent the same customer ID from being used in the separate databases as two different customers. To designate which system will assign the IDs, use the Setup Customer ID Owner page.

To set up attributes and options for your customers:

1. If integrated with PeopleSoft SCM or Financials, you must decide who the owner is for customer ID and contact ID assignment and create the assignment on the Master ID DB Setup Page.
2. Define autonumbering for ID assignments for the setIDs that you use to assign customers and contacts.
3. Set up tables that any required fields prompt against, such as Rate Type, Currency Code, and so on.

If your system is integrated with PeopleSoft SCM or PeopleSoft Financials, you must also set up the Collector and Credit Analyst tables.

4. Set up tables that optional fields prompt against such as Location, Site, and so on.

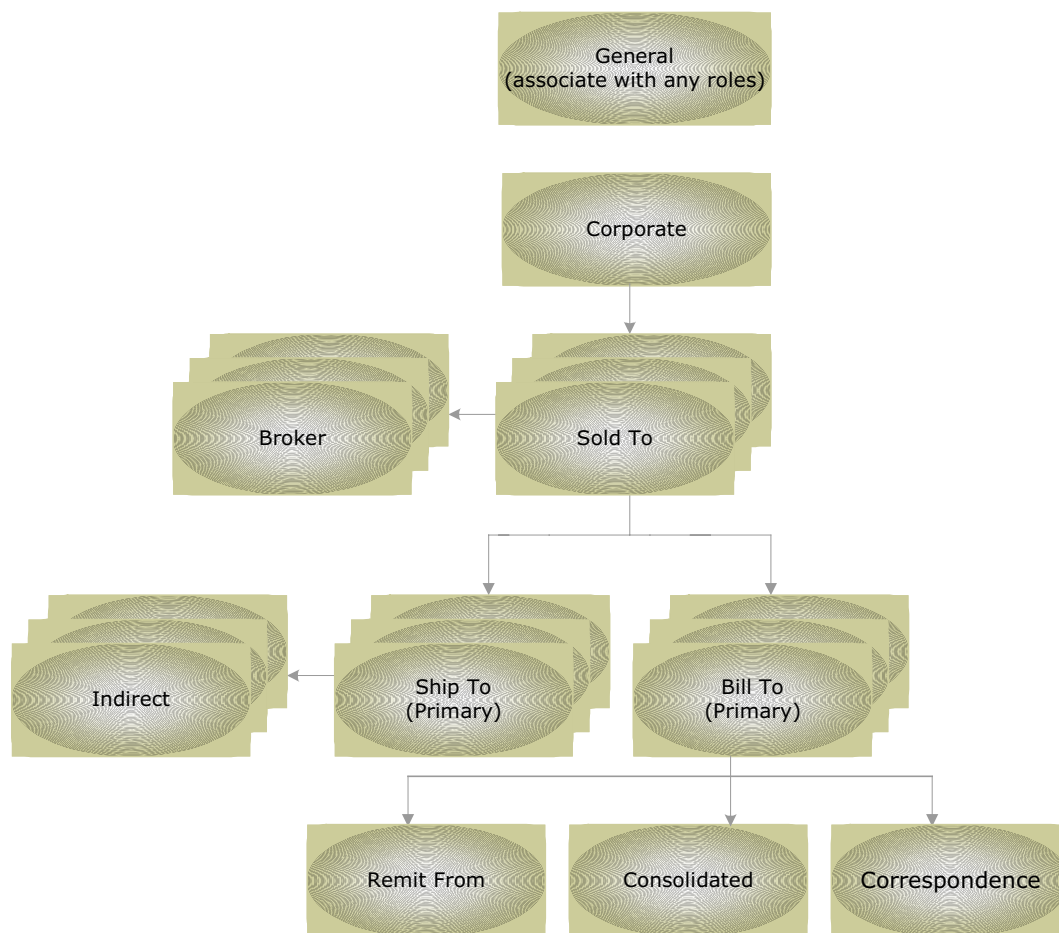
Understanding Customer Roles

Customer roles indicate the functional use of the customer ID number. Customer information is associated with specific customer roles. These roles include corporate, sold to, bill to, ship to, remit from, correspondence, broker, and indirect customer. Use the PeopleSoft CRM Maintain Customer component to select those roles.

Note. For PeopleSoft CRM installations that are integrated with PeopleSoft Supply Chain Management or PeopleSoft Financials, use the Manage Customer pages in those products to maintain optional role-specific attributes that you want to track for a particular customer. These attributes, such as bill to options, ship to options, and sold to options, are used by PeopleSoft Supply Chain Management applications such as PeopleSoft Order Management, Billing, and Receivables. The pages that support these attributes are available in the PeopleSoft SCM or Financials Manage Customer component.

Defining these roles for your customers is the key to integration, especially when used in conjunction with the richness of customer processing in PeopleSoft Supply Chain Management applications. By assigning your customer to the correct role, you can use PeopleSoft SCM or Financials to define attributes and processing options based on this role. If you integrate your PeopleSoft CRM front office processes with non-PeopleSoft systems, you can pass these customer role characteristics to your downstream ERP system to facilitate processing options and controls defined in your external ERP system. You can also use these customer role definitions in your enterprise reports.

The following diagram illustrates the various customer roles.



Customer roles

Note. The consolidated role is used by PeopleSoft Billing and is available only from PeopleSoft SCM or Financials Maintain Customer component.

Corporate Customers

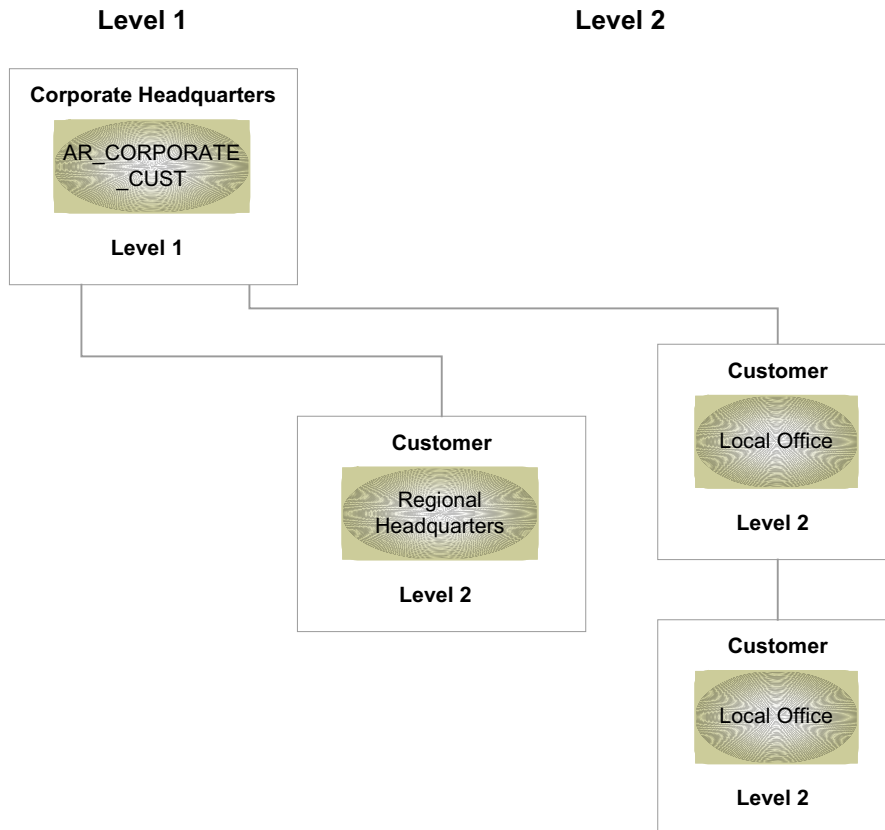
Establishing a corporate customer enables you to track customers as a group of customers as well as by separate companies within the corporate group. A corporate customer group consists of one parent customer and many child customers. Each child is a customer on its own, but you can roll some of its attributes up into the parent company.

Use the corporate customer relationship to group customers who are part of the same overall conglomerate, but whose customer numbers are different. You can group customers together within a business unit or across business unit lines and within a TableSet or across TableSets.

You base the decision to organize customers into a corporate customer group on the hierarchies in which you arrange your customers. However, the way your customers do business governs the remit from customer grouping. You determine when to set up corporate customers, whereas attributes of your customers determine when remit from customers are set up.

Related Customer Structure

Suppose that you have a corporate customer group with three basic levels. You add each local office as a customer, add each regional headquarters as a customer, and add the corporate headquarters as a customer. By doing so, you create a structure that actually has only two levels, with all of the customers (level 2) pointing to the corporate headquarters as the corporate customer (level 1).



The related customer structure—two levels

Sold To Customers

A *sold to* customer is someone that your company sells goods and services to. Defining a customer as a sold to customer controls the customer lookup prompts within the PeopleSoft CRM system when you need to reference sold to customers. You can associate multiple bill to and ship to customers to a single sold to customer, and multiple sold to customers to a single corporate customer.

For PeopleSoft CRM installations integrated with PeopleSoft Supply Chain Management, you can use the Sold to Options page in the SCM Manage Customer component to define your specific sold to processing information for customers who place orders in PeopleSoft Order Management.

Note. In PeopleSoft CRM, the Sold To Options page is for inquiries only.

Ship To Customers

A *ship to* customer receives delivery of goods or services. In PeopleSoft CRM, defining your customer as a ship to customer controls the customer lookup prompts within the CRM system

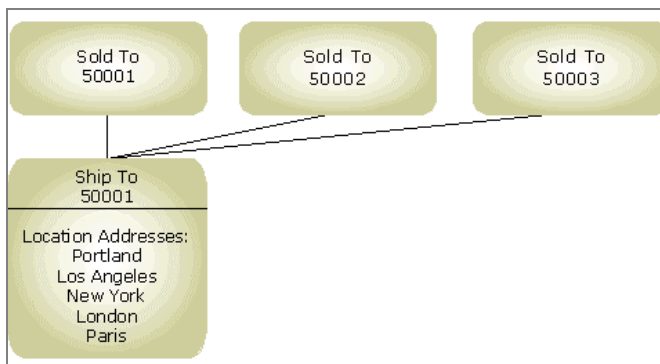
when you need to reference sold to customers. You can associate multiple ship to customers with a single sold to customer. Alternately, you can associate a single ship to customer with multiple sold to customers. It is important to set up your ship to customers correctly to reflect the processing options that you want applied to each ship to customer and each ship to location address accurately.

Note. For PeopleSoft CRM installations integrated with PeopleSoft Supply Chain Management, you can use the Ship to Options page in SCM to define your ship to processing information for customers who use PeopleSoft Order Management. In PeopleSoft CRM, the Ship To Options page is for inquiries only.

Understanding the Sold To-Ship To Customer Relationship

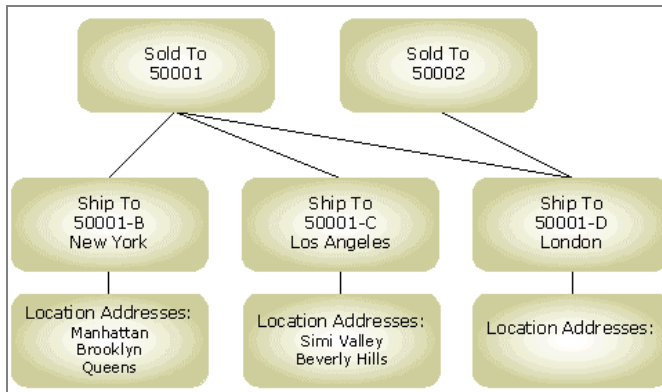
To apply the correct processing criteria to sold to and ship to customers, you must correctly assign either separate customer IDs or location addresses to your customers.

In the following example, all of the ship to addresses (location addresses) for ship to customer 50001 have the same processing options—only the addresses vary. Notice that a single ship to customer can be associated with multiple sold to customers.



One processing option for multiple ship to addresses

In the next example, if you want to establish different processing criteria for each of the addresses for the ship to customer, you must assign them different customer IDs. Each ID, in turn, can have multiple location addresses that share the same processing options.



Multiple processing options for multiple ship to addresses and locations

Bill To Customers

Bill to customers receive invoices. In PeopleSoft CRM, defining your customer as a bill to customer controls the customer lookup within the CRM system when you need to reference bill to customers.

Note. For PeopleSoft CRM installations integrated with PeopleSoft Supply Chain Management applications, you can use SCM or Financial's Bill to Option page to define bill to processing information for customers who place orders using PeopleSoft Billing. In PeopleSoft CRM, the Bill To Options page is for inquiries only.

Remit From Customers

A *remit from* customer is the paying entity. Every customer is its own remit from customer by default. A remit from group follows the organization of the way your customers handle their payments. Many large organizations have a central accounts payable location that pays bills for multiple divisions. This centralized payments group is a remit from customer. A remit from group consists of one remit from customer who sends you checks and many customers who receive invoices and belong to a remit from customer.

The structure of a remit from group enables your personnel to apply payments across customer lines and across business units. When you receive a payment from a remit from customer, you can, for example, use PeopleSoft Receivables to view all open items for all customers that belong to that remit from group.

Note. Remit from customer groups are valid only for bill to customers. For PeopleSoft CRM installations integrated with PeopleSoft Supply Chain Management or PeopleSoft Financials, use the Remit From Options page in those products to define specific bill to processing information to invoice your customers with PeopleSoft Billing and receive payments with PeopleSoft Receivables. In PeopleSoft CRM, the Bill To Options page is for inquiries only.

Correspondence Customers

A correspondence customer structure enables you to direct dunning, finance charge, and accounts receivable statement correspondence for several customers to one overall customer. The correspondence customer structure is similar to remit from customer structure in that you can group many customers and associate them with a different customer for correspondence purposes. This grouping mechanism is designed to streamline communication.

Correspondence customers are, by default, associated with a bill to customer. Correspondence customers must also be bill to customers.

Note. For PeopleSoft CRM installations integrated with PeopleSoft Supply Chain Management and PeopleSoft Financials, you can use the Correspondence Options 1 and Correspondence Options 2 pages in those products to define your specific correspondence information if you process your accounts receivables using PeopleSoft Receivables.

Broker Customers

The broker customer can be the ordering unit for the sold to customer. Brokers can place orders on behalf of a customer and can receive documents such as order acknowledgements and quotation responses. Brokers receive courtesy copies of sales acknowledgements and invoices. A broker can be associated with many sold to customers, and more than one broker can be associated with a sold to customer. For example, a broker may represent a particular brand of products. The broker sells the brand to many different sold to customers. A broker can also negotiate promotional discounts between you and the customer.

In PeopleSoft CRM, defining a customer as a broker customer controls the customer lookup in PeopleSoft products that need to define and reference customers as brokers.

Indirect Customers

Indirect customers can represent customers that a ship to customer can eventually sell to. In the event that the ship to customer represents a distribution warehouse, the items shipped to that warehouse may eventually be sold to a customer of the ship to customer. In PeopleSoft CRM, defining a customer as an indirect customer controls the customer lookup in PeopleSoft products that need to define and reference indirect customers. At this time, assigning a customer as an indirect customer is for tracking purposes only. PeopleSoft products do not process or use indirect customers in any reporting or analysis.

Using the Maintain Customers Component

The Maintain Customers component enables you to enter new customers into your database or modify existing information regarding a customer's role, address, contact information, and so on.

When you're ready to add new customers to your database, begin by entering the required information on the General Information page and use the subsequent pages based on your defined relationships with this customer. Use the pages with role designations to enter processing attributes and additional information unique to the customer's function. Enter information that may apply to one or more customer roles.

To enter a new customer:

1. Analyze your relationship with the customer and determine which customer roles to use in reference to this customer.

Customer roles indicate the functional use of the customer ID number. Customer information is associated with specific customer roles. These roles include corporate, sold to, bill to, ship to, remit from, correspondence, broker, and indirect customer.

2. Enter basic customer information on the General Information page.
3. Enter information regarding the customer's different roles on the Roles page. Use the links on the Roles page to further define how the customer related to other customers defined in the system.
4. Create site information that helps you to identify specific customer locations.
5. Enter address information for the customer ID on the Address page.
6. Enter information for the various contacts that are related to the customer and associate a person ID to the customer.
7. Associate your customer to a customer group using the Link Customer to Group page.

General Information Page

Usage	Use the General Information page to add or review a customer's name, address, and level information.
Object Name	RB_CUST_GENERAL1
Navigation	Manage Customer Info, Manage Customer Information, Use, Maintain Customers, General Information
Access Requirements	Enter a setID and a customer ID.

General Information Roles Site Address Contacts

MMA Property Management Group

SetID: CRM01 Customer ID: 301

'Customer Status: Active Customer Level: Regular 'Currency Code: USD
 'Customer Since: 01/01/2000 'Customer Type: User 1 'Rate Type: CRRNT
 'Name: MMA Property Management Group 'Short Name: MMA Group
 Website URL: (example: http://www.peoplesoft.com) Website URL

Company Profile

Taxpayer ID: Industry ID: Type: Stock Symbol:
 Ownership: Employee Total: Revenue Generated:

Address View All First 1-3 of 4 Last

Address	Name
1200 Lake Drive, Circle Pines, MN, 55014, USA	Main
7890 Redwood falls, MN, USA	Redwood Falls (branch)
8908766, Roseville, MN, USA	Roseville

Add Address

Phone First 1 of 1 Last

'Phone Type	Description	Primary	Int'l Prefix	'Telephone	Phone Extension
Default		<input checked="" type="checkbox"/>	800	988-5644	

Email View All First 1 of 1 Last

'Email Type	Name	Primary	'Email Address
		<input type="checkbox"/>	

Last Modified: 04/02/2001 10:14PM PDT NAPA

General Information page

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

Customer Status	Indicates whether the customer is <i>Active</i> or <i>Inactive</i> . The default value is <i>Active</i> .
Customer Level	Select <i>New</i> , <i>Prospect</i> , <i>Regular</i> , or <i>Temporary</i> .
Currency Code	The code for a specific denomination of a monetary transaction.
Customer Since	You can specify that the customer has been a customer since a certain date.
Customer Type	Enables you to identify customer categories for use in your reports. As part of your implementation, you can define these types to represent categories that make sense for your customer tracking needs. For example, <i>User 1</i> might represent your manufacturing customers, <i>User 2</i> might represent your retail customers, and so forth. Each type can be up to 10 characters long.
Rate Type	The currency exchange rate type. The default rate type is set up on the Installation page when you set up your PeopleSoft CRM system.
Name	The customer's standard name.

Short Name	A customer's short name appears on other pages when there is not room for the full name.
Website URL	The URL of the company's website. Click the Website URL link to launch the website that you entered in this field.

Company Profile

Use these fields to track information about customers that are companies.

Taxpayer ID	The taxpayer ID for the company.
Industry ID	The industry ID as assigned in the Industry table.
Type	The type of company. Valid values are <i>Branch, Division, Headquarters, Single Location,</i> and <i>Subsidiary.</i>
Stock Symbol	The stock symbol for the company.
Ownership	Valid values are <i>Public</i> or <i>Private.</i>
Employee Total	The total number of employees for the company.
Revenue Generated	The revenue generated by the company.

Address

In the **Address** group box, view or add information regarding the customer's address.

Address	Click a link to access the Address page, where you update the customer address information.
Name	The description of the address.
Add Address	Click to access the Address Information page, where you can enter detailed address information.

Phone

The **Phone** group box enables you to enter different types of phone numbers for your customer.

Phone Type	Select the type of phone number that appears here. Valid values are <i>Default, Business, Cellular, FAX, Home, Pager 1, Pager 2,</i> and <i>Telex.</i>
Description	Freeform text that describes the phone number.
Primary	Select this check box if this is the main phone number for the company.
Int'l Prefix (international prefix)	The international prefix for the phone number.
Telephone	Enter the telephone number.

Phone Extension Enter any relevant extension for the phone number.

Email

The **Email** group box enables you to enter different email addresses for your customer.

Email Type Enter the type of email address this is. Valid values are *Business, Campus, Dorm, Home, or Other*.

Name Freeflow text of up to 30 characters that describes the email address.

Primary Select the check box if this is a primary email address.

Email Address Enter the email address for the customer (for example, customer@company.com).

Roles Page

Usage	Use the Roles page to indicate the functional role or roles.
Object Name	RB_CUST_RELATIONS
Navigation	Manage Customer Info, Manage Customer Information, Use, Maintain Customers, General Information
Access Requirements	Enter a setID and a customer ID.

General Information
Roles
Site
Address
Contacts

MMA Property Management Group

SetID: CRM01 Customer ID: 301

☒ Corporate Customer

CRM01 301 MMA Property Management Group

[Corporate Selection](#)

☒ Sold To Customer
[Sold To Selection](#)

☐ Broker

☒ Ship To Customer
[Ship To Selection](#)

☐ Indirect Customer

☒ Bill To Customer
[Bill To Selection](#)

☒ Correspondence Customer

CRM01 301 MMA Property Management Group

[Correspondence Selection](#)

☒ Remit From Customer

CRM01 301 MMA Property Management Group

[Remit From Selection](#)

Roles page

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

Corporate Customer	When you add a customer, the system automatically designates it as a corporate customer and displays the setID and customer ID. If you want this customer to be assigned to a different corporate customer, clear this check box and enter a different setID and customer ID.
Corporate Selection	Click this link to access the Corporate Selection page, where you can view corporate customer groups and other customer relationships.
Sold To Customer	Select this check box if you sell goods and services to this customer.
Sold To Selection	Click this link to access the Sold to Selection page and the Sold To Options page.
Broker	Select this check box if this is a customer who can place orders on behalf of another customer.
Ship To Customer	Select this check box if this customer receives order shipments.
Ship to Selection	Click this link to access the Ship to Selection page and the Ship To Options page.
Indirect Customer	Select this check box if this is a customer that your ship to customer can eventually sell goods to. An indirect customer represents a customer that your ship to customer can eventually sell goods to.
Bill To Customer	Bill to customers receive invoices. When you designate a customer as a bill to customer, the system automatically selects the Correspondence Customer and Remit From Customer check boxes. These check boxes are unavailable for entry unless you have selected the Bill To Customer check box.
Bill to Selection	Click this link to access the Bill to Selection page and the Bill To Options page.
Correspondence Customer	When you designate a customer as a bill to customer, the system automatically designates the customer as a correspondence customer. If you prefer different correspondence assignments for this customer, clear this check box and enter the setID and customer ID of the new correspondence customer.
Correspondence Selection	Click this link to access the Correspondence Sel (correspondence selection) page.
Remit From Customer	When you designate a customer as a bill to customer, the system automatically designates the customer as a remit from customer. If you prefer different remit from assignments for this customer, clear the check box and enter the setID and customer ID of the new remit from customer.

Remit From Selection

Click this link to view the Remit From Selection page, where you can define remittance options for your customer.

All of the customer roles must have an associated primary address, which you enter on the General Information page. You can enter one address for all the customer roles, or you can designate separate addresses for each role.

You can assign one role or multiple roles to each customer. For PeopleSoft CRM installations that are integrated with PeopleSoft Supply Chain Management or PeopleSoft Financials, you must select the following roles if you are defining a company that participates in intercompany transfers: bill to customer, ship to customer, and sold to customer.

Note. The role-specific options on the Sold To Options, Ship To Options, Correspondence Options, and Bill To Options pages are display-only except for the Status field. To define and maintain these options, you must be integrated with a PeopleSoft FDM application and use the FDM Manage Customer component to fully use these pages. Also, If you have designated a customer as a correspondence customer and want to change this designation, you must first delete the correspondence options that you have set up for this customer.

Changing a Role

If you change a customer's role, you must also cancel the role-specific options that you've defined for that role. These other options may have been generated by the system or they may have been defined by another database if you are integrated with PeopleSoft SRM or Financials.

For example, to clear the check box for a ship to customer, you must first select the Ship to Selection link, access the Ship To Options page, change the status of the role to *Inactive*, and save the page. Additionally, you must remove the customer from the Allowed Ship To list for all sold to customers.

Corporate Selection Page

Usage	Use the Corporate Selection page to view corporate customer groups and view other customer relationships. Corporate customers group multiple customers with other role designations. If your PeopleSoft CRM installation is integrated with PeopleSoft FDM, you can also maintain credit information for both corporate customers and bill to customers within PeopleSoft SCM or Financials.
Object Name	CUST_CORP_SELECT
Prerequisites	Select the Corporate Customer check box on the Roles page.
Navigation	Click the Corporate Selection link on the Roles page.
Access Requirements	Enter a setID and a customer ID.

MMA Property Management Group
SetID: CRM01 **Customer ID:** 301

Other Customer Relationships		
Remit From Customer:	CRM01 301	MMA Property Management Group
Correspondence Customer:	CRM01 301	MMA Property Management Group

Corporate Customer Group			Find View All	First	1 of 1	Last
SetID	Customer ID	Name				
CRM01	301	MMA Property Management Group				

[Roles](#)

Corporate Selection page

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

The **Other Customer Relationships** group box displays read-only information about the customer's other relationships with your company.

Remit From Customer If this customer has been selected as a remit from customer, the setID and customer ID appear.

Correspondence Customer If this customer has been selected as a correspondence customer, the setID and customer ID appear.

The **Corporate Customer Group** grid displays a list of all the customers that are associated with the corporate customer

Click the **Roles** link to return to the Roles page, where you can continue defining your customer's roles.

Sold to Selection Page

Usage	Use the Sold to Selection page to view customer relationships for this sold to customer.
Object Name	RB_CUST_SOLDTO_SEL
Prerequisites	Select the Sold To Customer check box on the Roles page.
Navigation	Click the Sold To Selection link on the Roles page.
Access Requirements	Enter a setID and a customer ID.

Sold To Options Sold to Selection

MMA Property Management Group

SetID: CRM01 Customer ID: 301

Sold To Customer

☒ Sold To Customer

Broker Customer ☐ Broker

Broker Customers Find | View All First 1 of 1 Last

'Broker ID Sldto Priority Name Nbr

301 1 MMA Property Management Group + -

Ship To Customers Find | View All First 1 of 1 Last

'Ship To Customer Sldto Priority Name Nbr

301 1 MMA Property Management Group + -

Bill To Customers Find | View All First 1 of 1 Last

'Customer Sldto Priority Name Nbr

301 1 MMA Property Management Group + -

[Roles](#)

Sold to Selection page

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

Sold To Customer

This check box indicates whether the customer is a sold to customer.

Broker Customer

This check box indicates whether the customer is a broker customer.

Broker Customers

Broker ID

Select a customer ID for this broker.

Sldto Priority Name Nbr
(sold to priority name number)

Indicates the primary sold to customer to be used on the sales order, quote, and return material authorization in PeopleSoft Order Management.

Ship To Customers

Ship To Customer

Select a customer ID for this ship to customer. If you selected the Ship To Customer check box on the Roles page, the customer ID automatically appears.

Sldto Priority Name Nbr
(sold to priority name number)

Indicates the primary sold to customer to be used on the sales order, quote, and return material authorization in PeopleSoft Order Management.

Bill To Customers

Customer

Select a customer ID for this bill to customer. If you selected the Bill To Customer check box on the Roles page, the customer ID automatically appears.

Sldto Priority Name Nbr (sold to priority name number)

Indicates the primary sold to customer to be used on the sales order, quote, and return material authorization in PeopleSoft Order Management.

Click the **Roles** link to return to the Roles page, where you can continue defining your customer's roles.

Sold to Options Page

Usage	Use the Sold to Options page to view your sold to customers. Use this page to cancel sold to options if you are removing a customer from the sold to role.
Object Name	RB_CUST_SOLDTO_OPT
Navigation	Click the Sold To Selection link on the Roles page.
Access Requirements	Enter a setID and a customer ID.

Sold To Options Sold to Selection

MMA Property Management Group

SetID: CRM01 Customer ID: 301

Sold To Customer Options Find | View All First 1 of 1 Last

Effective Date: 01/01/2000 *Status: Active

☒ Allow Product Substitutions ☐ Restocking Fee Freight Charge Method:

Carton Label Format ID:

Ship Container Label Format ID:

Order Number Preference

☒ System Product ID ☐ Customer Product ID

Pricing Options

Grace Pricing Discount Days: Price Rule Code:

Exclusive Pricing ID: Load Price Rule:

[Roles](#)

Sold To Options page

With the exception of the **Status** field, this page is display-only in PeopleSoft CRM. Sold to options may have been defined in PeopleSoft SCM or Financials but also may be defined automatically by the system even if you are not integrated with those PeopleSoft applications.

Use the **Status** field to inactivate the sold to options if you want to remove the sold to role for this customer. To define and maintain this page, you must be integrated with PeopleSoft SCM or Financials and use the Manage Customer component from within those products.

Ship to Selection Page

Usage	Use the Ship to Selection page to view customer relationships for this customer.
Object Name	CUST_SHIPTO_SELECT
Prerequisites	Select the Ship To Customer check box on the Roles page.
Navigation	Click the Ship To Selection link on the Roles page.
Access Requirements	Enter a setID and a customer ID.

Ship to Selection page

The system displays the **SetID** and the **Customer ID** that you entered to access the page. If this customer is a ship to customer or an indirect customer, those check boxes will be selected in the appropriate group box.

Sold To Customers

The **Sold To Customers** group box displays the names of the sold to customers that are associated with this ship to customer.

Sold To Customer

The customer ID of the sold to customer as entered on the Sold to Selection page.

Indirect Customers

The **Indirect Customers** group box enables you to define the indirect customers for this ship to customer.

Indirect Customer ID

The customer ID for the indirect customer. If you selected the Indirect Customer check box on the Roles page, the customer ID appears by default.

Shpto Priority Nbr (ship to priority number) The assigned priority for this ship to customer. For PeopleSoft Order Management, a ship to priority of *1* indicates the primary ship to customer to be used on the sales order, quote, or return material authorization from within PeopleSoft Order Management.

Click the **Roles** link to return to the Roles page, where you can continue defining your customer's roles.

Ship To Options Page

Usage	Use the Ship To Options page to view information about ship to customers and to inactivate the ship to options when you want to remove the ship to role for this customer.
Object Name	RB_CUST_SHIPTO_OP1
Navigation	Click the Ship To Selection link on the Roles page.
Access Requirements	Enter a setID and a customer ID.

Ship To Options Addtl Ship To Options Ship to Selection

MMA Property Management Group

SetID: CRM01 Customer ID: 301

Ship To Customer Options Find | View All First 1 of 1 Last

Effective Date: 01/01/2000 *Status: Active

Ship To Options

Distribution Network Code: APPL Language Code: English

Store Number: Single Ship Flag:

Carton Label Format ID: ☐ Allow Overpick

Ship Container Label Format ID: Max Picking Tolerance:

JIT Parameters

Ship Prior to Request Date: Yes

Days Allowed After Request Dt:

Number of Days Early:

Partial Schedules: Yes

Partial Order: Yes

Cancel Backorder: No

[Roles](#)

Ship To Options page

With the exception of the **Status** field, this page is display-only in PeopleSoft CRM. Ship to options may have been defined in PeopleSoft SCM or Financials, but also may be defined automatically by the system even if you are not integrated with those PeopleSoft applications.

Use the **Status** field to inactivate the ship to options if you want to remove the ship to role for this customer. To define and maintain this page, you must be integrated with PeopleSoft SCM or Financials and use the Manage Customer component from within those applications.

Addtl Ship To Options Page

Usage	Use the Addtl Ship To Options (additional ship to options) page to view additional information about the ship to customer.
Object Name	RB_CUST_SHIPTO_OP2
Navigation	Click the Ship To Selection link on the Roles page.
Access Requirements	Enter a setID and a customer ID.

Ship To Options Addtl Ship To Options Ship to Selection

MMA Property Management Group

SetID: CRM01 Customer ID: 301

Ship To Customer Options Find | View All First 1 of 1 Last

Effective Date: 01/01/2000 Status: Active

Domestic Export

Ship Via Code:

Freight Terms Code:

Carrier ID:

Shipping Priority Code:

Required Documents

- ☐ Canadian Customs Invoice
- ☐ Shippers Export Declaration
- ☐ Certificate of Origin
- ☐ North American Free Trade Agmt

Export Flags

- ☐ Insurance Required
- ☐ Flag Orders for Export
- AERP:
- ☐ Military End User Flag

[Roles](#)

Addtl Ship To Options page

This page is display-only in PeopleSoft CRM. To define and maintain this page, you must be integrated with PeopleSoft SCM or Financials and use the Manage Customer component from within one of those applications.

Bill to Selection Page

Usage	Use the Bill to Selection page to view role designations for this customer.
Object Name	CUST_BILLTO_SELECT
Prerequisites	Select the Bill To Customer check box on the Roles page.
Navigation	Click the Bill To Selection link on the Roles page.
Access Requirements	Enter a setID and a customer ID.

Bill To Options Bill to Selection

MMA Property Management Group

SetID: CRM01 Customer ID: 301

Bill To Customer

☒ Bill To Customer

Associate Roles

☐ Correspondence Customer CRM01 302

☒ Remit From Customer CRM01 301

Sold To Customer Find | View All First 1 of 1 Last

Sold To Customer	Name
301	MMA Property Management Group

[Roles](#)

Bill to Selection page

The system displays the **SetID** and the **Customer ID** that you entered to access the page. If a customer is a designated bill to customer, the check box is selected in the **Bill To Customer** group box. Also, if the customer is a correspondence customer or a remit from customer, the appropriate check boxes are selected in the **Associate Roles** group box.

Sold To Customer

The **Sold To Customer** group box enables you to define the sold to customers associated with this bill to customer.

Sold To Customer The customer ID of the sold to customer that is associated with the bill to customer role.

Name The name of the sold to customer.

Click the **Roles** link to return to the Roles page, where you can continue defining your customer's roles.

Bill To Options Page

Usage	Use the Bill To Options page to view bill to options and to cancel bill to options when you want to remove the bill to role for this customer.
Object Name	RB_CUST_BILLTO_OPT
Navigation	Click the Bill To Selection link on the Roles page.
Access Requirements	Enter a setID and a customer ID.

Bill To Options page

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

Customer Bill To Options

With the exception of the **Effective Date**, **Status**, **Credit Analyst**, and **Collector** fields, this page is display-only in PeopleSoft CRM. Bill to options may have been defined in PeopleSoft SCM or Financials, but also may be defined automatically by the system even if you are not integrated with those PeopleSoft applications.

Use the **Status** field to inactivate the bill to options if you want to remove the bill to role for this customer. To define and maintain this page, you must be integrated with PeopleSoft SCM or Financials and use the Manage Customer component from within those applications.

Effective Date

Date that the row in the table becomes effective.

Status

Indicates whether a row in a table is **Active** or **Inactive**. Use this field to inactivate pages that have been brought over from PeopleSoft FDM if you want to change a customer's role.

Credit Analyst

The predefined personnel code for the credit analyst who will be working with the customer.

Collector

The predefined personnel code for the collector who will be working with the customer.

When integrated with PeopleSoft SCM or Financials, the **Collector** and **Credit Analyst Req** fields are required for all bill to customers. You must also keep the Credit Analyst and Collector tables in sync between databases.

Correspondence Sel Page

Usage	Use the Correspondence Sel (correspondence selection) page to view other customer correspondence groups as well as other customer relationships defined for this customer.
Object Name	CUST_CRSPD_SELECT
Prerequisites	Select the Correspondence Customer check box on the Roles page.
Navigation	Click the Correspondence Selection link on the Roles page.
Access Requirements	Enter a setID and a customer ID.

Crspd Options1 Crspd Options2 Correspondence Sel

MMA Property Management Group

SetID: CRM01 Customer ID: 301

Other Customer Relationships

Corporate Customer:	CRM01	301	MMA Property Management Group
Remit From Customer:	CRM01	301	MMA Property Management Group

Customer Correspondence Group Find | View All First 1 of 1 Last

SetID	Customer ID	Name
CRM01	301	MMA Property Management Group

[Roles](#)

Correspondence Sel page

The system displays the **SetID** and the **Customer ID** that you entered to access the page. It also displays other customer relationships as well as all the other customers who may be in the same correspondence group.

Customer Correspondence Group

For PeopleSoft CRM installations integrated with PeopleSoft SCM or Financials applications, the **Correspondence Customer Group** grid lists all customers whose billing information will appear on the correspondence for this customer. This grid displays only the present customer's information unless the customer is a correspondence customer—one who receives the correspondence for other customers. For each customer included in this customer's correspondence group, the system displays the **SetID**, **Customer ID**, and customer **Name**.

Note. The group box displays only the correspondence group in which the customer belongs. It doesn't indicate whether or not that customer actually is a correspondence customer, it just displays all the customers that are in the same correspondence group as the customer.

Click the **Roles** link to return to the Roles page, where you can continue defining your customer's roles.

Crspd Options1

Usage	Use the Crspd Options1 (correspondence options 1) page to view additional correspondence information about the customer and to cancel the correspondence options when you want to remove the correspondence role for this customer.
Object Name	RB_CUST_CRSPD_OPT1
Navigation	Click the Correspondence Selection link on the Roles page.
Access Requirements	Enter a setID and a customer ID.

Crspd Options1 Crspd Options2 Correspondence Sel

MMA Property Management Group

SetID: CRM01 Customer ID: 301

Correspondence Options View All First 1 of 1 Last

Effective Date: 03/15/2001 *Status: Active Bank Account:

Language Code: ENG Bank:

Contact

- ☐ Suppress Contact
- ☐ Primary Contact
- ☐ Override

Address

- ☐ Contact Address
- ☐ Primary Address
- ☐ Item Address
- ☐ Override

[Roles](#)

Crspd Options1 page

With the exception of the **Status** field, this page is display-only in PeopleSoft CRM. Correspondence options may have been defined in PeopleSoft SCM or Financials, but also may be defined automatically by the system even if you are not integrated with those PeopleSoft applications.

Use the **Status** field to inactivate the correspondence options if you want to remove the correspondence role for this customer. To define and maintain this page, you must be integrated with PeopleSoft SCM or Financials and use the Manage Customer component from within those applications.

Click the **Roles** link to return to the Roles page, where you can continue defining your customer's roles.

Crspd Options2 Page

Usage	Use the Crspd Options2 (correspondence options 2) page to view additional correspondence information for the customer.
Object Name	RB_CUST_CRSPD_OPT2
Navigation	Click the Correspondence Selection link on the Roles page.
Access Requirements	Enter a setID and a customer ID.

Crspd Options1 Crspd Options2 Correspondence Sel

MMA Property Management Group

SetID: CRM01 Customer ID: 301

Correspondence Options Find | View All First 1 of 1 Last

Effective Date: 03/15/2001 Status: Active

Dunning ID

Dunning ID: Dunning Group: All Groups

☐ Dunning Hold

Finance Charging

Finance Charge ID: Finance Charge Group: All Groups

☐ Finance Charge Hold

Statements

Statement ID: Statement Group: All Groups

☐ Statement Hold

[Roles](#)

Crspd Options2 page

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

This page is display-only in PeopleSoft CRM. To define and maintain this page, you must be integrated with PeopleSoft SCM or Financials and use the Manage Customer component in those applications.

Click the **Roles** link to return to the Roles page, where you can continue defining your customer's roles.

Remit From Selection Page

Usage	Use the Remit From Selection page to view remit from information as well as other customer relationships.
Object Name	CUST_REMIT_SELECT
Prerequisites	Select the Remit From Customer check box on the Roles page.
Navigation	Click the Remit From Selection link on the Roles page.
Access Requirements	Enter a setID and a customer ID.

Gord
SetID: SHARE **Customer ID:** 1001008

Other Customer Relationships

Corporate Customer: SHARE 1001008 Gord

Correspondence Customer:

Remit From Customer Group Find | View All First 1 of 1 Last

SetID	Customer ID	Name
SHARE	1001008	Gord

[Roles](#)

Remit From Selection page

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

Other Customer Relationships

Information regarding the customer's other relationships appears in this group box.

Corporate Customer The corporate customer associated with this remit from customer.

Correspondence Customer The correspondence customer associated with this remit from customer.

Remit From Customer Group

SetID The setID for the remit from group.

Customer ID The customer ID of the customer in the remit from group.

Name The name of the customer in the remit from group.

Click the **Roles** link to return to the Roles page, where you can continue defining your customer's roles.

Site Page

Usage	Use the Site page to group a set of customer addresses. Defining sites for a customer is optional—the system does not require each customer address to be associated to a site.
Object Name	RB_CUST_SITE
Navigation	Manage Customer Info, Manage Customer Information, Use, Maintain Customers, Site

Access Requirements	Enter a setID and a customer ID.
---------------------	----------------------------------

Site page

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

Site Info

Site ID A text identifier for the site.

Description A short description of the site ID.

Site Phone

This group box enables you to enter phone information specific to the site.

Prefix Enter the prefix for the phone number.

Telephone Enter the telephone number.

Phone Extension Enter any relevant extension for the phone number.

Last Modified The username of the person who last changed the information on the page and the date and time that it was saved.

Note. After you have defined sites for this customer, you must save your changes to the page in order to reference these sites on the Address page. If you do not save your changes and attempt to view the list of sites from the Site field, the system will not display them until they have been saved.

Address Page

Usage	Use the Address page to enter one or more addresses for a customer and to assign descriptions to each location.
-------	---

Object Name	RB_CUST_ADDRESS
Navigation	Manage Customer Info, Manage Customer Information, Use, Maintain Customers, Address
Access Requirements	Enter a setID and a customer ID.

General Information Roles Site Address Contacts

MMA Property Management Group

SetID: CRM01 Customer ID: 301

Address Information View All First 1 of 4 Last

*Address Seq: 1 + -

Address Detail View All First 1 of 1 Last

*Effective Date: 01/01/2000 *Status: Active

Address ID: 689 Description: Main

Country: USA United States

Address 1: 1200 Lake Drive

Address 2:

Address 3:

City: Circle Pines

County: Anoka Postal: 55014

State: MN Minnesota

Time Zone:

Address Associations

☒ Bill To ☒ Primary

☒ Ship To ☒ Primary

☒ Sold To ☒ Primary

☐ Broker ☐ Primary

☐ Indirect ☐ Primary

☐ Correspondence Address

Region ID:

Site Name:

To select newly added sites, save your changes before associating addresses to sites.

Last Modified: 04/02/2001 10:14PM PDT NAPA

Address page

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

Address Information

Address Seq (address sequence)

This number is assigned by the system as you add addresses. Use the plus and minus buttons to create or remove addresses for this customer.

Address Detail

Effective Date

Date that the row in the table becomes effective. To add or delete an effective-dated address, use the plus and minus buttons for that section of the page.

Status

Select a status of *Active* or *Inactive* for the address.

Address ID

Enter a new address ID or associate the address with an existing address ID.

Description

Freeform text that describes the address.

Country	Country for the address. Other address fields adjust to reflect the country that you specify.
Address 1	Freeflow text-entry field that enables you to describe street, street number, apartment number, and other address information.
Address 2	Freeflow text-entry field that enables you to describe street, street number, apartment number, and other address information.
Address 3	Freeflow text-entry field that enables you to describe street, street number, apartment number, and other address information.
City	Enter the name of the city (if a United States address) or town (if international).
County	Name of county for address, if applicable.
Postal	Enter a postal code for both U.S. and international addresses.
State	Enter the state (if a United States address)
Province	Enter the province (if a Canadian address).
Time Zone	Select the time zone for the address.

Address Associations

These check boxes are controlled by the roles that you defined for this customer. For example, if you defined this customer as a bill to customer, then the **Bill To** check box and the **Primary** check box are available for you to select for the address.

Bill To	Indicates that this is a bill to address. Select the Primary check box if this address is the primary bill to address for this customer.
Ship To	Indicates that this is the ship to address. Select the Primary check box if this address is the primary ship to address for the customer.
Sold To	Indicates that this is the sold to address. Select the Primary check box if this address is the primary sold to address for the customer.
Broker	Indicates that this is a broker's address. Select the Primary check box if this address is the primary broker address for this customer.
Indirect	Indicates that this is an indirect customer's address. Select the Primary check box if this address is the primary indirect address for this customer.
Correspondence Address	Indicates that this is the address that receives the correspondence.

Region ID

Select a region for the address as defined on the Region page.

Site Name

Select a site name to associate with the address. Enter site names on the Site page. If you do not see a site that you've recently entered, you probably did not save the site definition before using the Address page. Save the site information page to view recently added sites.

Note. All of the customer roles defined for this customer must have an associated primary address. For example, the system will not allow you to define a customer as a bill to customer if you have not defined a primary bill to address.

Contacts Page

Usage	Use the Contacts page to enter customer contact information.
Object Name	RB_CUST_PERSON
Navigation	Manage Customer Info, Manage Customer Information, Use, Maintain Customers, Contacts
Access Requirements	Enter a setID and a customer ID.

General Information Roles Site Address **Contacts**

MMA Property Management Group

SetID: CRM01 Customer ID: 301

Contact Info View All First 1 of 4 Last

Name: Teri Thomas Person ID: 636 Person Lookup + -

☒ Primary Bill To ☒ Primary Ship To ☒ Primary Sold To

Contact Address First 1-2 of 2 Last

*Address Seq	Physical Location	Primary
1	MINNEAPOLIS	<input checked="" type="checkbox"/>
2	ROSEVILLE	<input checked="" type="checkbox"/>

Contact Type First 1 of 1 Last

*Contact Type	Description
1 EXT	External Contact

Self Service Security

<input type="checkbox"/> Bill To	<input type="checkbox"/> Ship To	<input type="checkbox"/> Correspondence Customer	<input type="checkbox"/> Order Save
<input type="checkbox"/> Sold To	<input type="checkbox"/> Broker	<input type="checkbox"/> All Orders Flag	<input type="checkbox"/> Maintain Addresses

Last Modified: 04/03/2001 4:32PM PDT NAPA

Contacts page

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

Contact Info

The address type check boxes are available for entry if the corresponding customer role is selected on the General Information page.

Name	The name of the person that you are creating as a contact.
Person ID	The person ID of the contact.
Person Lookup	Click this button to access the Person Lookup page, where you can search for a name and person ID.
Primary Bill To	Select this check box if the contact is the primary person to receive invoices. If your PeopleSoft CRM installation is integrated with PeopleSoft Supply Chain Management, this value will be used to populate the primary bill to contact for an invoice in PeopleSoft Billing.
Primary Ship To	Select this check box if the contact is the primary person to receive shipments. If your PeopleSoft CRM installation is integrated with PeopleSoft Supply Chain Management, this value will be used to populate the ship to contact for an order in PeopleSoft Order Management.
Primary Sold To	Select this check box if the contact is the primary sold to contact to receive orders, return material authorizations, or buying agreement renewal letters. If your PeopleSoft CRM installation is integrated with PeopleSoft Supply Chain Management, this value will be used to populate the sold to contact in PeopleSoft Order Management.

Contact Address

Enter information regarding the person's location in this group box.

Address Seq (address sequence)	Select the address sequence from the drop-down list box.
Physical Location	Text description of the physical location.
Primary	Select to indicate that this is the primary address for this contact.

Contact Type

In the **Contact Type** group box, enter information about the customer contact.

Contact Type	Select a contact type code from the list of available options.
For more information about setting up contact types, see Creating Contact Types.	

Self Service Security

If your PeopleSoft CRM installation is integrated with PeopleSoft Supply Chain Management, the items in this group box enable you to define self-service security options for self-service products such as PeopleSoft eStore and PeopleSoft eBill Payment. These security options are not used in PeopleSoft CRM self-service transactions.

Bill To	Enables security for bill to customers.
Ship To	Enables security for ship to customers.
Correspondence Customer	Enables security for correspondence customers.
Order Save	Enables security for saving orders.
Sold To	Enables security for sold to customers.
Broker	Enables security for brokers.
All Orders Flag	Enables security for all orders.
Maintain Addresses	Enables security for adding or changing addresses.

For more information about self-service security in PeopleSoft eStore and PeopleSoft eBill Payment, see your PeopleSoft Supply Chain Management documentation.

Person Lookup Page

Usage	Use the Person Lookup page to find a person ID or name.
Object Name	RB_PERS_SRCH_SEC
Navigation	Click the Person Lookup button on the Contacts page.
Access Requirements	Enter setID and a customer ID.

Person Lookup

Search Criteria

Enter a full or partial name (Last name, First name), or a full or partial Person ID.

For first name searches, use % for the last name wildcard. example %,Dan%

Name:

Person ID:

Search Results View All First 1-5 of 5 Last

Selected	Name	Person ID	Contact Flag
<input type="checkbox"/>	Jackson, Sam E	633	Internal
<input type="checkbox"/>	Jensen, Will	649	External
<input type="checkbox"/>	Jognu, Ravi T	602	Internal
<input type="checkbox"/>	Johanssen, John A	628	Internal
<input type="checkbox"/>	Johnson, Barb	638	External

Person Lookup page

Search Criteria**Name**

The name of the person that you are searching for in last name, first name order. You must enter at least a partial value in this field to perform a search. Enter **J**, to find all last names that begin with **J**. You may use the percent sign as a wildcard to help with your name search. For example, you could enter **%,Joe** to find everyone with the first name of Joe.

Person ID

The person ID of the person that you are searching for.

Note. If you leave the name and person ID fields blank and perform a search, the system will return all persons in alphabetical order by their last names.

Search Results

This group box displays all the names and person IDs that have been returned.

Selected

Select this check box to select the person as a contact.

Name

The name of the person.

Person ID

The identifier for the person.

Contact Flag

Indicates that this is an **Internal** or **External** contact.

Select the check box for the name that you want to use and click **OK** or click **Cancel** to return to the Contacts page.

Setting Up Collectors and Credit Analysts

When you are entering customer information, you may need to enter collector and credit analyst information to assign customers to different roles.

Collector Page

Usage	Use the Collector page to set up valid collectors.
Object Name	COLLECTOR_TABLE
Navigation	Define Business Rules, Define General Options, Use A-D, Collector
Access Requirements	Enter a setID.

Collector page

Effective Date	Date the row in the table becomes effective.
Status	Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i> .
Name	Enter the name of the collector.
Telephone	Enter the telephone number for the collector.

Credit Analyst Page

Usage	Use the Credit Analyst page to add or modify information about credit analysts.
Object Name	CR_ANALYST_TABLE
Navigation	Define Business Rules, Define General Options, Use A-D, Credit Analyst
Access Requirements	Enter a setID and a credit analyst code.

Credit Analyst

SetID: CRM01 Credit Analyst: CBB

Credit Analyst Find | View All First 1 of 1 Last

Effective Date:	05/29/2001	Status:	Active	
Name:				
Telephone:				

Credit Analyst page




Effective Date	Date the row in the table becomes effective.
Status	Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i> .
Name	Enter the name of the credit analyst.
Telephone	Enter the telephone number for the credit analyst.

Maintaining Addresses

The Address record is actually a separate table that is linked to both customer and person records. This page is a way to maintain a specific address regardless of who is linked to it. There is a component interface built on this page to update the global address table.

Address Record Page

Usage	Use the Address Record page to enter addresses for customers and for workers.
Object Name	RB_ADDRESS
Navigation	Manage Customers, Manage Customers, Use, Maintain Addresses
Access Requirements	Enter an address ID.

Address ID:	NEXT	
Country:	USA 	United States
Address 1:	<input type="text"/>	
Address 2:	<input type="text"/>	
Address 3:	<input type="text"/>	
City:	<input type="text"/>	
County:	<input type="text"/>	Postal: <input type="text"/>
State:	<input type="text"/> 	
Time Zone:	PST 	Pacific Time, Tijuana
Last Modified:		

Address Record page

Address ID	Use this field to associate the address with an existing address ID.
Country	The country code for the address. The country code determines which address fields appear on the page. Not all of the address fields described in this section will apply to the country's address format.
Address 1	Freeflow text entry field that enables you to describe street, street number, apartment number, and other address information.
Address 2	Freeflow text entry field that enables you to describe street, street number, apartment number, and other address information.
Address 3	Freeflow text entry field that enables you to describe street, street number, apartment number, and other address information.
Block (Bloque)	In Spanish addresses, a building or buildings that are close together may be called a block (bloque). Include the block name in the address, if necessary.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
City	Enter the name of the city (if a United States address) or town (if international).
County (also Prefecture and Parish)	Name of the county (prefecture/parish) for the address, if applicable.
Postal	Enter a postal code for both U.S. and international addresses.
State	The state, if this is a U.S. address.
Province	The province code, if this is a Canadian address.
Time Zone	The time zone of the address.
Last Modified	The date and time that the address was last modified.

CHAPTER 16

Maintaining Contacts

In the Maintain Contact menu, you set up and maintain contact information for internal and external contacts. External contacts can be consumers, customers, or business partners of your organization. An internal contact is an employee of your organization.

PeopleSoft CRM's contact functionality maintains the contact information and links a contact to one or more customers. When you save a contact, the system creates a contact ID and updates the contact tables. You enter information about the contact on the Personal Info (personal information) page.

PeopleSoft provides two enterprise integration points (EIPs) that update the Personal Info page and the email and phone information for contacts between PeopleSoft CRM and PeopleSoft Supply Chain Management or Financials. They are PERSON_BASIC_SYNC and PERSON_BASIC_FULLSYNC.

For more information about the PERSON_BASIC_SYNC and PERSON_BASIC_FULLSYNC EIPs, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook*.

Personal Info Page

Usage	Use the Personal Info (personal information) page to maintain information about each contact.
Object Name	RB_PERSON
Navigation	Manage Customer, Manage Customer, Use, Maintain Contacts
Access Requirements	Enter a person ID.

Personal Info Personal Address/Phone/Email Work Function Storage Locations

Stu Marx Person ID: 0011

Name Info

Format for Country: USA United States

Name: Marx, Stu

Prefix:

First Name: Stu Middle Name:

Last Name: Marx Suffix:

Salutation Code:

Contact Flag: Internal Preferred Communication: Call

Language Code: English EmpID:

ID's defined for this Person

Person ID: 0011

EmpID:

Contact ID:

User ID's

User ID	Description
SMARX	Marx, Stu Mang

Last Modified: 05/09/2001 3:39PM PDT DVP1

Personal Info page

The **Person ID** that you entered to access the page appears.

Name Info

The Name Info group box enables you to enter the contact's name according to the country format that you select. Not all options for names appear on the page.

Format for Country

Select the country name format for this contact. When you navigate out of this field, the system displays the appropriate fields for the country that you entered.

Title

Enter a title, such as Mr., Mrs., Duke, or Duchess, from the list of valid titles. The system stores titles in the Title Table. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo Rules.

Preferred First Name

For the Netherlands, if the employee prefers to use a name different from the official first name, enter it here. The system uses the preferred name when you generate form letters or mailing labels for this employee.

Second Last Name

For Spanish employees, enter the second surname (mother's surname).

Royal Suffix	To record the royal suffix, select a value from the available options. Valid values are stored on the Name Royal Suffix page. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo Rules.
Last Name	The person's last name.
Suffix	Any suffix associated with the name.
Salutation Code	Enter a salutation for correspondence.
Contact Flag	Select External if the contact is a consumer, customer, or business partner. Select Internal if the contact is an employee of your organization who needs to be set up as a contact.
Preferred Communication	The type of communication to use for this contact. In PeopleSoft CRM, the only valid values are Call , Fax , and Standard Mail .
Language Code	<p>The language in which you want the field labels and report headings of your reports to be printed. The field values appear as you enter them.</p> <p>Language also refers to the language spoken by an employee, contact, or non-employee.</p>
Title	Freeform text of up to 36 characters used to describe the person's job title.
Gender	Valid values are Female , Male , and Unknown .
Date of Birth	Select the person's date of birth using the calendar.
EmplID (employee ID)	Display-only field that displays a unique identification code for an individual associated with your organization. Only internal contacts can have an employee ID.
IDs Defined for This Person	
Person ID	The ID defined for this person in your system.
EmplID	Unique identification code for an employee associated with your organization.
Contact ID	The ID defined for this person as a contact.
Last Modified	Display-only field that displays the date and time when the attached file was last modified.

Address/Phone/Email Page

Usage	Use the Address/Phone/Email page to maintain address and phone information for the contact.
Object Name	RB_PERSON_ADDRESS
Navigation	Manage Customer, Manage Customer, Use, Maintain Contacts, Personal Address/Phone/Email
Access Requirements	Enter a person ID.

Personal Info Address / Phone / Email

Person ID: NEXT

Address Info View All First 1 of 1 Last

'Address Seq: 1 + -

Address Detail View All First 1 of 1 Last

'Effective Date: 05/08/2001 [calendar icon] 'Status: Active + -

'Address Type: Business 'Address ID: NEXT [search icon]

Description: [text box]

Country: USA [search icon] United States

Address 1: [text box]

Address 2: [text box]

Address 3: [text box]

City: [text box]

County: [text box] Postal: [text box]

State: [text box] [search icon]

Time Zone: [dropdown menu]

Last Modified: [text box]

Phone Info View All First 1 of 1 Last

'Phone Type	Description	Primary	Int'l Prefix	Telephone	Phone Extension
[dropdown menu]	[text box]	<input type="checkbox"/>	[text box]	[text box]	[text box] + -

Email Info View All First 1 of 1 Last

'Email Type	Description	Primary	'Email Address
[dropdown menu]	[text box]	<input type="checkbox"/>	[text box] + -

Address/Phone/Email page

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

Address Info

In the **Address Info** (address information) group box, enter information that relates to the contact's location, status, and address.

Address Seq (address sequence)	The sequential number that the system assigns as you add addresses.
Effective Date	Date that the row in the table becomes effective.
Status	Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i> .
Address Type	The type of address that you are entering. Valid values are <i>Legal</i> , <i>Business</i> , <i>Campus</i> , <i>Dormitory</i> , <i>Home</i> , <i>Mailing</i> , and <i>Other</i> . The only value that is populated from PeopleSoft HRMS is <i>Mailing</i> .
Address ID	Use this field to associate the address with an existing address ID.
Description	A description for the address.
Country	The country code for the contact. The country code determines which address fields appear on the screen. Not all of the address fields described in the following section will apply to the country's address format.
Address 1	Freeflow text entry field that enables you to describe street, street number, apartment number, and other address information.
Address 2	Freeflow text entry field that enables you to describe street, street number, apartment number, and other address information.
Address 3	Freeflow text entry field that enables you to describe street, street number, apartment number, and other address information.
Block (Bloque)	In Spanish addresses, a building or buildings that are close together may be called a block (bloque). Include the block name in the address, if necessary.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
City	Enter the name of the city (if a United States address) or town (if international).
County (also Prefecture and Parish)	Name of county (prefecture/parish) for the address, if applicable.
Postal	Enter a postal code for both U.S. and international addresses.
State	The state, if this is a U.S. address.
Province	The province code, if this is a Canadian address.
Time Zone	The time zone of the address.
Last Modified	The date and time that the address was last modified.

Phone Info

The **Phone Info** (phone information) group box enables you to enter different types of phone numbers for the contact.

Phone Type	Select the type of phone number this is. Valid values are <i>Business</i> , <i>Cellular</i> , <i>Default</i> , <i>Fax</i> , <i>Home</i> , <i>Pager 1</i> , <i>Pager 2</i> , or <i>Telex</i> . Phone types <i>Home</i> and <i>Default</i> are not updated by HRMS.
Int'l Prefix (international prefix)	Enter the international prefix for the phone number.
Telephone	Enter the telephone number.
Phone Extension	Enter any relevant extension for the phone number.
Primary	Select this check box if this is the main phone number for this individual. An individual can have only one primary phone number.

Email Info

The **Email Info** (email information) group box enables you to enter different email addresses for the contact. To enable workflow for this contact, the contact must have a primary email address listed on this page. Otherwise, the contact will be unable to receive email notifications.

Email Type	Enter <i>Business</i> , <i>Campus</i> , <i>Business</i> , <i>Home</i> , or <i>Other</i> as the type of email address this is. HRMS only updates the email type <i>Business</i> .
Email Address	Enter the email address for the contact (for example, <i>joe_smith@company.com</i>).
Primary	Select the check box if this is the primary email address. An individual can have only one primary email address.

Creating Contact Types

Use the Contact Type Code page to define the different types of customer contacts. When you set up customers in your system, you define the contacts within their organizations that deal with various aspects of your business relationship. There may be multiple contacts—one that deals with shipping issues, another for accounting problems, and so on.

Note. At this time, there are no EIPs to keep contact types in sync between databases. You will need to ensure that data is kept in sync manually.

Contact Type Code Page

Usage	Use the Contact Type Code page to define the different types of customer contacts.
Object Name	CONTACT_TYPE_CODE
Navigation	Define Business Rules, Define General Options, Use A – D, Contact Type Codes
Access Requirements	Enter a setID and a customer contact type code.

Contact Type Code

SetID: SHARE Customer Contact Type Code: BUSN

Description: Status:

Short Description: Standard Contact Type:

Contact Type Code page

The system displays the **SetID** and the **Customer Contact Type Code** that you entered to access the page.

Description	Freeflow text of up to 30 characters describing the nature of the contact type.
Status	Valid values are <i>Active</i> or <i>Inactive</i> .
Short Description	Freeflow text of up to 15 characters describing the nature of the contact type.
Standard Contact Type	Select a value from the list of available options. Valid values are <i>Billing, Broker, External, General, Internal, Management, Payables, Sales, Service</i> , and <i>Warehouse</i> .

CHAPTER 17

Setting Up Products

At the core of your operations are the products and services that you offer your customers. You must be able to describe, group, and analyze your product information quickly and effectively.

In PeopleSoft CRM, you can share product information across multiple business units and access PeopleSoft Inventory data to determine the availability of stockable products. We provide you with the ability to group products to facilitate pricing, sales analysis, and reporting. You can use either your own product numbers or your customer's part numbers on sales orders while retaining the ability to track both.

PeopleSoft CRM product maintenance provides you with a subset of features from PeopleSoft Order Management for those customers who are using CRM as a standalone product. These features enable you to:

- Define a product from an item definition.
- Define basic product information such as product brand and product category.
- Track a competitor's equivalent pricing.
- Define product groupings.
- Link a product to a product group or set of product groups.

If you have PeopleSoft Order Management, use its product maintenance features rather than PeopleSoft CRM in order to do the following:

- Define products as product kits.
- Define products as configured kits.
- Define product alternatives.
- Create product catalogs.
- Attach product photos to your product definitions.

Defining Products

Defining your products begins when you establish item attributes. When you enter an item definition, you can have the system add the item as a product. When you save the item

definition, the product ID, description, and standard unit of measure are copied to the Product Definition table.

Use the Product Definition component to create products and add or modify attributes for your products. If your PeopleSoft CRM system is integrated with PeopleSoft Order Management, use the Product Maintenance features supported in Order Management.

After products have been created, use the pages in the Define Products menu to change or add product attributes.

PeopleSoft uses the product ID as a primary search key for the Product Master table. Once you have defined a product ID, use the lookup button for the Product ID field to access it on other pages in your system.

For more information about Product Maintenance in PeopleSoft Order Management, see the *PeopleSoft Order Management PeopleBook*.

To set up attributes and options for your products:
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1. Define numbering parameters using the Automatic Numbering page in the General Options component if you want the system to automatically create product ID numbers.
2. Establish product groups using the Product Groups page.

You can organize products with similar traits into groups for pricing, reporting, sales buying agreements, tax purposes, and so on. After you define your groups and products, associate them with each other using the Product Groups page.

3. Set up items in the Define Items component.

Single-item product IDs must be associated with an item ID. You can either define the product ID when you create the item, or you can create the product ID separately and associate it with existing item IDs if applicable. The flexibility of PeopleSoft CRM Item Maintenance and Product Maintenance components enables you to associate a single item ID with one or more product IDs so that you can sell the same item under different product IDs.

For more information about setting up items, see Understanding Item Definition in PeopleSoft CRM.

Defining Product Attributes

Once the system settings are confirmed and items are defined, begin defining products and assigning attributes to them.

To set up products:

1. Define the required attributes for the product ID at the setID level using the Product Definition component.
2. If you did not establish a product ID when you set up your item ID, create it on the Product Definition page.

You can also create multiple product IDs for one item ID for greater marketing and reporting flexibility.
3. Establish ordering parameters and units of measure for the product ID using the Product Attributes by UOM page.
4. When you create a PeopleSoft Inventory item, associate it with valid units of measure for stocking, shipping, and ordering on the Units of Measure page.
5. Establish the list price and manufacturers suggested retail price (MSRP) for the product using the Product Price page.
6. Link the product to a product group using the Product Groups page.

Product Definition - Definition Page

Usage	Use the Product Definition - Definition page to define product information.
Object Name	PROD_DEFN
Navigation	Define Products and Items, Define Products, Use, Product Definition
Access Requirements	Enter a setID and product ID.

Definition Competitors Prod Gen Info1 Prod Gen Info2 Prod Gen Info3

SetID: CRM01 Product ID: 10000

Item ID: 10000 Refrigerat

Std UOM: EA Each ☒ Inventory Item

Description: Refrigerator, Plastic Bins

Long Description: Refrigerator, Plastic Bins

Catalog Number:

Model Number:

Product Brand:

Status: Active

Product Category:

Product Definition - Definition page

The system displays the **SetID** and **Product ID** that you entered to access the screen.

If you've defined your product ID on the Item Definition page, the item ID associated with the product ID appears by default. You can override this default and select another item ID. You can associate multiple product IDs with a single inventory item to enhance your marketing and sales-tracking capabilities.

Item ID	The item identifier as defined on the Item Definition page.
Std UOM (standard unit of measure)	The unit of measure that reflects the most common unit of measurement for the item. This is defined on the Item Definition page when you set up the item.
Inventory Item	In PeopleSoft CRM, this check box is unavailable. All products must be inventory items if they are entered using PeopleSoft CRM.
Description	Freeform text of up to 36 characters that describes the product. This field is required; however, you have the option of entering a different description than that of the item associated with the product.
Long Description	This field is optional; you may enter an extended product description.
Catalog Number	If a product appears in another vendor's catalog, you have the option of adding a product catalog number and model number. This number indicates the catalog number defined for the product on the Definition page.
Model Number	Indicates the model number defined for the product on the Definition page.
Product Brand	You can associate a product with a product brand as defined on the Product Brand page.
Status	Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i> .
Product Category	Associate the product with a product category as defined on the Product Category page.

Competitors Page

Usage	Use the Competitors page to keep track of your competitors' equivalent products by product number and any alternate products that your competitors may have. You can use this information for sales analysis and reporting.
Object Name	PROD_COMPITRS
Navigation	Define Products and Items, Define Products, Use, Product Definition, Competitors
Access Requirements	Enter a setID and product ID.

Definition Competitors Prod Gen Info1 Prod Gen Info2 Prod Gen Info3

SetID: SHARE Product ID: 1000 LORNA

Competitor Find | View All First 1 of 1 Last

*Competitor Code:

*Competitor Product Number:

Description:

Competitors page

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

Competitor Code

Competitor codes are established on the Competitor Codes page. These fields are informational only and there is no processing associated with these fields. However, you can create reports to do analysis using this information.

Competitor Product Number

The competitor's product number.

Description

Freeform text to describe the competitor's product.

Creating User-Defined Product Fields

PeopleSoft CRM delivers a wide variety of options for defining your product attributes; however, your business may have additional requirements. You can use the Prod Gen Info (product general information) pages to establish user-defined fields to be stored in the Product Master table.

Each of the Prod Gen Info pages contains fields of various sizes and types: from 1 to 30 characters long in alphanumeric, numeric with decimal places, or numeric without decimals formats. Use PeopleTools Application Designer to modify the field labels on the page; you must provide the appropriate code changes in order for PeopleSoft to process these fields.

To establish user-defined product fields:

1. Determine the usage requirements, and select the appropriate field on one of the Prod Gen Info pages.
2. Modify the field label using PeopleTools Application Designer.
3. Make the necessary code changes.

For more information about using Application Designer, see the *PeopleTools Application Designer PeopleBook*.

Product Definition - Prod Gen Info1 Page

Usage	Use the Product Definition - Prod Gen Info1 (product general information 1) page to create alphanumeric fields of a specific character length.
Object Name	PROD_GEN_INFO1
Navigation	Define Products and Items, Define Products, Use, Product Definition, Prod Gen Info1
Access Requirements	Enter a setID and product ID.

Product Definition - Prod Gen Info1 page

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

Prod Char30 A (product character 30 A) A–D alphanumeric fields, up to 30 characters in length.

Prod Char1 A (product character 1 A) A–D alphanumeric fields, 1 character in length.

Prod Char30 B (product character 30 B) A–D alphanumeric fields, up to 30 characters in length.

Prod Char1 B (product character 1 B) A–D alphanumeric fields, 1 character in length.

Prod Char30 C (product character 30 C) A–D alphanumeric fields, up to 30 characters in length.

Prod Char1 C (product character 1 C) A–D alphanumeric fields, 1 character in length.

Prod Char30 D (product character 30 D) A–D alphanumeric fields, up to 30 characters in length.

Prod Char1 D (product character 1 D) A–D alphanumeric fields, 1 character in length.

Product Definition - Prod Gen Info2 Page

Usage	Use the Product Definition - Prod Gen Info2 (product general information 2) page to create additional alphanumeric fields.
Object Name	PROD_GEN_INFO2
Navigation	Define Products and Items, Define Products, Use, Product Definition, Prod Gen Info2
Access Requirements	Enter a setID and product ID.

Definition Competitors Prod Gen Info1 **Prod Gen Info2** Prod Gen Info3

SetID: SHARE Product ID: NAS1 testing product group box

Prod Char10 A: Prod Char2:

Prod Char10 B: Prod Char4:

Prod Char10 C: Prod Char6:

Prod Char10 D: Prod Char8:

Product Definition - Prod Gen Info2 page

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

Prod Char10 A (product character 10 A) A–D alphanumeric, up to 10 characters in length.

Prod Char2 (product character 2) Alphanumeric fields, up to 2 characters in length.

Prod Char10 B (product character 10 B) A–D alphanumeric, up to 10 characters in length.

Prod Char4 (product character 4) Alphanumeric fields, up to 4 characters in length.

Prod Char10 C (product character 10 C) A–D alphanumeric, up to 10 characters in length.

Prod Char6 (product character 6) Alphanumeric fields, up to 6 characters in length.

Prod Char10 D (product character 10 D) A–D alphanumeric, up to 10 characters in length.

Prod Char8 (product character 8) Alphanumeric fields, up to 8 characters in length.

Product Definition - Prod Gen Info3 Page

Usage	Use the Product Definition - Prod Gen Info3 (product general information 3) page to create additional numeric fields.
Object Name	PROD_GEN_INFO3
Navigation	Define Products and Items, Define Products, Use, Product Definition, Prod Gen Info3
Access Requirements	Enter a setID and product ID.

Product Definition - Prod Gen Info3 page

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

Prod N12.3 A (product number 12.3 A)	A–D numeric fields, up to 12 integers and 3 decimal places in length.
Prod Nbr 15 A (product number 15 A)	A–D numeric fields, up to 15 integers in length.
Prod N12.3 B (product number 12.3 B)	A–D numeric fields, up to 12 integers and 3 decimal places in length.
Prod Nbr 15 B (product number 15 B)	A–D numeric fields, up to 15 integers in length.
Prod N12.3 C (product number 12.3 C)	A–D numeric fields, up to 12 integers and 3 decimal places in length.
Prod Nbr 15 C (product number 15 C)	A–D numeric fields, up to 15 integers in length.
Prod N12.3 D (product number 12.3 D)	A–D numeric fields, up to 12 integers and 3 decimal places in length.
Prod Nbr 15 D (product number 15 D)	A–D numeric fields, up to 15 integers in length.

Using Product Groups

You can group products so that they share the same processing parameters—pricing by product line or reporting by product line, for example. Using product groups saves you the repetitive effort of applying order-processing parameters to products one at a time.

Establishing product groups is a two-step process. First, create product group codes on the Product Group Table page. Second, link products with any number of product groups on the Product Groups page.

Product Group Table Page

Usage	Use the Product Group Table page to define product group codes.
Object Name	PROD_GROUP_TBL
Navigation	Define Products and Items, Define Products, Use, Product Group
Access Requirements	Enter a setID and a product group.

Product Group Table

SetID: CRM01 Product Group: A/C

Find | View All First 1 of 1 Last

Effective Date: 04/13/2001 Status: Active

Description: Air Conditioner

Short Description: A/C

☐ Global

Product Group Type

<input checked="" type="checkbox"/> Pricing	<input checked="" type="checkbox"/> Forecast	<input checked="" type="checkbox"/> Reporting	<input checked="" type="checkbox"/> Freight
<input checked="" type="checkbox"/> Accounting	<input checked="" type="checkbox"/> Transportation	<input checked="" type="checkbox"/> VAT	
<input checked="" type="checkbox"/> Product Catalog	<input checked="" type="checkbox"/> Buying Agreement	<input checked="" type="checkbox"/> Tax	

Product Group Table page

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

Effective Date	Date that the row in the table becomes effective.
Status	Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i> .
Description	Freeform text of up to 36 characters that describes the product group.
Short Description	Freeform text of up to 15 characters.

Global

Select this check box if you want all products to be included in this product group. If you select this option, a product is included in this group even if you haven't specified its inclusion on the Product Groups page in the Define Products menu.

Product Group Type

The following categories are predefined functional group categories that help you organize your product groups.

Pricing

Select this check box for pricing groups.

Forecast

Select this check box for forecasting groups.

Reporting

Select this check box for reporting groups.

Freight

Select this check box for freight groups.

Accounting

Select this check box for accounting groups.

Transportation

Select this check box for transportation groups.

VAT (value added tax)

Select this check box for VAT groups.

Product Catalog

Select this check box for catalog groups.

Buying Agreement

Select this check box for buying agreement groups.

Tax

Select this check box for tax groups.

Product Groups Page

Usage	Use the Product Groups page to link products with any number of product groups.
Object Name	PROD_GROUP
Navigation	Define Products and Items, Define Products, Use, Link Product to Groups
Access Requirements	Enter a setID and product ID.

Product Groups

SetID: SHARE Product ID: 10000 Long Sleeve Biking Jersey, Men

Groups		Find View All	First	1-7 of 7	Last
*Group Type	*Product Group		Prim Rpt	Prim Prc	
Acct	001	Activewear - Clothing	<input type="checkbox"/>	<input type="checkbox"/>	+ -
Fcst	001	Activewear - Clothing	<input type="checkbox"/>	<input type="checkbox"/>	+ -
Freight	001	Activewear - Clothing	<input type="checkbox"/>	<input type="checkbox"/>	+ -
Pricing	001	Activewear - Clothing	<input type="checkbox"/>	<input type="checkbox"/>	+ -
Pricing	002	Cycling	<input type="checkbox"/>	<input type="checkbox"/>	+ -
Reporting	001	Activewear - Clothing	<input type="checkbox"/>	<input type="checkbox"/>	+ -
Trnspt	001	Activewear - Clothing	<input type="checkbox"/>	<input type="checkbox"/>	+ -

Product Groups page

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

Group Type

Products are grouped to share the same pricing, reports, sales buying agreements, transportation lead times, and taxes. You might also want to include products in product catalogs by groups instead of individually. The system comes with these functional product group types already defined.

Product Group

The number assigned to that grouping of products. A single product can belong to one or more product groups within each group type.

Prim Rpt (primary report)

When associating multiple groups with the **Reporting** group type, indicate a single primary reporting product group. Statistics will be distorted if a product appears on the report under every reporting group that the product is linked to.

Note. You must configure the system to include this product in reports.

Prim Prc (primary pricing)

Select a primary pricing product group if you've entered multiple groups with the **Pricing** group type. PeopleSoft's price maintenance feature enables you to download pricing data to a Microsoft Excel spreadsheet, make changes to product prices, and upload the new prices to update PeopleSoft tables. You can only update the price of a product as part of a single product group—the one appearing in bold on the spreadsheet. The system uses the group that you designate as the primary pricing product group. If you do not designate a primary group among multiple groups, the system uses the first one that it finds.

Assigning Product Attributes by Unit of Measure

You can restrict the units of measure available for use in PeopleSoft CRM and define product attributes by unit of measure.

Product Attributes by UOM Page

Usage	Use the Product Attributes by UOM (product attributes by unit of measure) page to restrict the units of measure available for use and to define minimum and maximum order quantities, valid order increments, and minimum selling prices. You must also use this page to assign a unit of measure for product kit component pricing.
Object Name	PROD_UOM
Navigation	Define Products and Items, Define Products, Use, Product Attributes by UOM
Access Requirements	Enter a setID and a product ID.

Product Attributes by UOM

SetID: SHARE Product ID: NAS1 testing product group box

Standard Unit of Measure: EA Each [Initialize UOM](#)

UOM	Dflt	Min Ord Qty	Max Ord Qty	Increment
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Find | View All First 1 of 1 Last

Minimum Selling Price

Product Attributes by UOM page

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

Standard Unit of Measure

The standard unit of measure that you defined for the item on the Item Definition – General: Common Page.

Initialize UOM (initialize units of measure)

Click this link to display all the ordering units of measure established for the product.

UOM

UOM (unit of measure)

Select any valid unit of measure designation from the list. For example, if you can enter material stock requests for widgets in eaches, cases, and pallets, but you sell them only in eaches and cases, do not select the **PL** (pallet) unit of measure.

Dflt (default)	Select one of the units of measure as the default. You can define a default unit of measure to use whenever the product is referenced on quotes, return material authorizations, and sales buying agreements.
Min Ord Qty (minimum order quantity)	Define minimum order quantity fields and use them in your order and quotation entry system. Use this in your ordering system to place the order line on hold if these limits are violated.
Max Ord Qty (maximum order quantity)	Define maximum order quantity fields and use them during order and quotation entry. Use this in your ordering system to place the order line on hold if these limits are violated.
Increment	Use this field to specify that a product can be sold only in specific increments.
Minimum Selling Price	The minimum selling price can be used by your ordering system to make sure that price adjustments do not take the unit price for a product in its selling unit of measure below the minimum established price. Select a currency to set up minimum selling price thresholds for each unit of measure by currency code.

Establishing Product Prices

You handle list pricing differently for stockable products and non-stockable products. Pricing for both stockable and non-stockable products is effective-dated, enabling you to track pricing history and establish new prices that will take effect at a designated date in the future. But pricing for stockable products, unlike non-stockable products, is based on PeopleSoft Inventory business units (ship from warehouses) so that you can differentiate pricing for each of your warehouses. Different fields are available on the Product Price page for stockable and non-stockable products.

For more information about stockable and non-stockable items, see Understanding Item Definition in PeopleSoft CRM.

Product price maintenance is structured to give you the flexibility to define a different price for products, depending on where you complete your product order form. PeopleSoft uses the concept of an *inventory business unit* to define which business unit to base your product prices on. When defining your system, select your inventory business units and enter them into the business unit table.

Product Price Page

Usage	Use the Product Price page to differentiate pricing among PeopleSoft Inventory business units, to set effective-dated prices for stockable and non-stockable items, and to price product kits at the parent product-ID level.
Object Name	PROD_PRICE
Navigation	Define Products and Items, Define Products, Use, Product Price
Access Requirements	Enter a setID, product ID, and unit of measure.

Product Price

SetID: SHARE

Product ID: LORNA Long Sleeve

Purchase in this UOM Find | View All First 1 of 1 Last

Unit of Measure: EA Each

Purchase in this Ship From BU Find | View All First 1 of 2 Last

Inventory Business Unit: CAC *Currency: USD

Pricing Details Find | View All First 1 of 1 Last

*Effective Date: 03/30/2001 *Status: Active

List Price: 10.0000

MSRP: 20.0000

Product Price page

The system displays the **SetID**, **Product ID**, and **Unit of Measure** that you entered to access the page.

Purchase in this Ship From BU

Inventory Business Unit The inventory business unit of the warehouse. This field is validated against the table BUS_UNIT_TBL_FS in PeopleSoft CRM.

Currency The currency used for the inventory business unit.

Pricing Details

Effective Date Date that the row in the table becomes effective.

Status Indicates whether a row in a table is *Active* or *Inactive*.

List Price The list price that you have established for the product.
The system applies price adjustments against the list price.

MSRP

Optionally enter the manufacturer's suggested retail price for the product. This field is not used by any processing or algorithms in PeopleSoft Order Management at this time.

Defining Product Brands

Use the Product Brand page to maintain the brands that you sell. Product brands aren't used by any PeopleSoft standard processing at this time.

Product Brand Page

Usage	Use the Product Brand page to maintain brand information about your products.
Object Name	PROD_BRAND
Navigation	Define Products and Items, Define Products, Use, Product Brand
Access Requirements	Enter a setID and brand.

Product Brand

SetID: SHARE Brand: JLYBRAND

Find | View All First 1 of 1 Last

'Effective Date:	03/22/2001	'Status:	Active	+	-
'Description:	JLYBRAND				
'Short Description:	JLYBRAND				

Product Brand page

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

Effective Date

Date that the row in the table becomes effective.

Status

Indicates whether a row in a table is *Active* or *Inactive*.

Description

Freeform text of up to 36 characters that describes the brand.

Short Description

Freeform text of up to 15 characters.

Defining Product Categories

Product categories can be used to help you define and group products into logical categories.

Product Category Page

Usage	Use the Product Category page to enter product categories. Product categories aren't used by any PeopleSoft standard processing at this time.
Object Name	PROD_CATEGORY
Navigation	Define Products and Items, Define Products, Use, Product Category
Access Requirements	Enter a setID and category.

Product Category

SetID: SHARE Category: CAMPING

Find | View All First 1 of 1 Last

*Effective Date:	01/01/1900	*Status:	Active
*Description:	Camping		
*Short Description:	Camping		

Product Category page

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

Effective date	Date that the row in the table becomes effective.
Status	Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i> .
Description	Freeform text that describes the category.
Short Description	Freeform text of up to 15 characters.

Associating Products With Upsell Scripts

An upsell script is a series of questions used to determine whether a customer should be advised to upgrade to a newer or different product. The product referenced by the case is associated with an upsell script. You can associate a product with an upsell script so that agents know when to use an upsell script for a particular product.

Product Branch Scripting

Usage	Use the Product Branch Scripting page to associate a product with a branch script.
Object Name	RB_PROD_BSCRIPT
Navigation	Define Products and Items, Define Products, Use, Setup Products for Upsells

Access Requirements	None
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Product Branch Scripting

SetID: CRM01
Product ID: 10000

Branch Scripting		
Product ID	Description	Upsell Script
10000	Refrigerator, Plastic Bins	<input type="text"/>

Product Branch Scripting page

SetID	The setID for the product.
Product ID	The identifier for the product.
Search	Click this button to locate branch scripts associated with this product.
Description	The text description of the product.
Upsell Script	Select an upsell script to associate with this product.

Setting Up Competitor Codes

Competitor codes help you track different products that competing companies might have that are similar to your products. Use these codes to create cross-references between your product and another company's product.

Competitor Codes Page

Usage	Use the Competitor Codes page to set up competitor codes. Use competitor codes to cross-reference your products with those of your competitors and to track competition on buying agreements, orders, and quotes.
Object Name	Competitor_CD
Navigation	Define Products and Items, Define Products, Use, Competitor Codes
Access Requirements	Enter a setID and a competitor code.

Competitor Codes page

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

Effective date	Date that the row in the table becomes effective.
Status	Indicates whether a row in a table is <i>Active</i> or <i>Inactive</i> .
Description	Freeform text that describes the competitor.
Short description	Freeform text of up to 15 characters.

Inquiring About Products

PeopleSoft CRM delivers inquiry pages that make it easy for you to view product information and to provide separate access to a group of users—perhaps salespeople—that should be limited to display-only access to product information. See your PeopleTools documentation for more information about structuring this type of security.

The pages in the Define Products, Inquire menu are generally duplicates of their associated pages under the Use menu, except that they are have a display-only format. However, for PeopleSoft CRM customers who are integrated with PeopleSoft Order Management, we included additional inquiry pages to view products that have been created in Order Management's version of Product Maintenance.

Exceptions to this standard are detailed in the following page descriptions.

Product Definition - Definition Inquiry Page

Usage	Use the Product Definition - Definition Inquiry page to view products that you have defined.
Object Name	PROD_DEFN
Navigation	Define Products and Items, Define Products, Inquire, Product Definition
Access Requirements	Enter a setID and product ID.

Definition		Options	Options2	Competitors	Prod Gen Info1	Prod Gen Info2	Prod Gen Info3
SetID:	SHARE	Product ID:	LORNA				
Item ID:	10000			Long Sleev			
Std UOM:	EA	Each			<input checked="" type="checkbox"/> Inventory Item		
Description:	m						
Long Description:							
Catalog Number:							
Model Number:							
Product Brand:			Status:	Active			
			Product Category:				

Product Definition - Definition Inquiry page

The pages of this component are identical to those in the Product Definition component of PeopleSoft CRM, except for the Options and Options2 pages. These pages are populated only if you have PeopleSoft Order Management installed.

For more information about the Options and Options2 pages, see the *PeopleSoft Order Management PeopleBook*.

Product Kit Summary

Usage	Use the Product Kit Summary page to view components of a product kit.
Object Name	PRODKIT_SUMMARY
Navigation	Define Products and Items, Define Products, Inquire, Product Kits
Access Requirements	None

Product Kit Summary

SetID: SHARE Product ID: 670001 Cyclist Starter Kit

Find | View All First 1-8 of 11 Last

*Component	Description	Quantity	*Per	*Unit	Eff Date	Obs Date	Ship w/o	VAT %	
1 10011	Biking Gloves, Unisex	1.0000	ASY	EA	01/01/2000	12/31/2000	<input type="checkbox"/>		+ -
2 10012	Pro5500 Road Helmet	1.0000	ASY	EA	01/01/2000	12/31/2000	<input type="checkbox"/>		+ -
3 10016	TC8799 Cyclometer	1.0000	ASY	EA	01/01/2000	12/31/2000	<input type="checkbox"/>		+ -
4 10018	Explorer Headband Nite Lite	1.0000	ASY	EA	01/01/2000	12/31/2000	<input type="checkbox"/>		+ -
5 10026	Patch Kit	1.0000	ASY	EA	01/01/2000	12/31/2000	<input checked="" type="checkbox"/>		+ -
6 30010		1.0000	ASY	EA	08/01/1999	08/10/2000	<input type="checkbox"/>	21	+ -
7 50001		1.0000	ASY	EA	08/01/1999	08/10/2000	<input type="checkbox"/>	9	+ -
8 50002		1.0000	ASY	EA	08/01/1999	08/10/2000	<input type="checkbox"/>	8	+ -

Print Text

Maintain Text

Product Kit Summary page

For more information about the Product Kit Summary page, see the *PeopleSoft Order Management PeopleBook*.

Product Aliases by Product Page

Usage	Use the Product Aliases by Product page to display information about the comparable customer part numbers for your products established on the Product Aliases page in the Maintain Customers menu in PeopleSoft Order Management.
Object Name	PROD_CUST_ALIAS2
Navigation	Define Business Rules, Define Products, Inquire, Product Aliases
Access Requirements	Enter a setID and product ID.

Product Aliases by Product	
SetID:	SHARE
Product ID:	10000
Long Sleeve Biking Jersey, Men	
Find View All First 1 of 1 Last	
Customer ID	Customer Product ID
1	

Product Aliases by Product page

For more information about the Product Aliases by Product page, see the *PeopleSoft Order Management PeopleBook*.

Where Used Product Component Page

Usage	Use the Where Used Product Component page to determine which product kits contain a specific component.
Object Name	PRODKIT_WHEREUSED
Navigation	Define Business Rules, Define Products, Inquire, Where Used Product Component
Access Requirements	Enter a setID, component, and effective date.

Where Used Product Component

*SetID:

*Component:

Effective Date: [Refresh Inquiry](#)

Product ID	Description	Quantity	Obs Date	Eff Date
1		1.0000	12/31/2099	

Where Used Product Component page

For more information about the Where Used Product Component page, see the *PeopleSoft Order Management PeopleBook*.

Messages Page

Usage	Use the Messages page to view messages attached to a product.
Object Name	PROD_MSG
Navigation	Define Products and Items, Define Products, Inquire, Messages
Access Requirements	Enter a setID and a product ID.

Messages

SetID: SHARE Product ID: 10000 Long Sleeve Biking Jersey, Men

Find | View All First 1 of 1 Last

*Seq Nbr: 1 *Message: UPSELL *Start Date: 08/21/2000 *End Date: 12/31/2099 + -

Action: None Special Pricing Incentives available for this product. See Special Promotion Schedules for promotional pricing.

Hold Code:

Messages page

For more information about the Messages page, see the *PeopleSoft Order Management PeopleBook*.

Notes Page

Usage	Use the Notes page to view a standard or custom note associated with a product.
Object Name	PROD_NOTE
Navigation	Define Products and Items, Define Products, Inquire, Notes
Access Requirements	Enter a setID and product ID.

Notes

SetID: SHARE Product ID: 10000 Long Sleeve Biking Jersey, Men

Find | View All First 1 of 1 Last

*Sequence: 1 *Classification: Standard + -

Standard Note Code: THANK Thank You

Note Type: REMINDER Reminder

Text: *****THANK YOU FOR YOUR ORDER!*****
We appreciate the opportunity to do business with you. If you have any questions about your order, please call our toll free hotline: 1-800-380-HELP.

Search Key Words First 1 of 1 Last

1 + -

Print On Documents First 1-2 of 2 Last

1 Order Acknowledgment
2 Invoice

Notes page

For more information about the Notes page, see the *PeopleSoft Order Management PeopleBook*.

Product Specifications Page

Usage	Use the Product Specifications page to view descriptions associated with the product.
Object Name	PROD_SPECS
Navigation	Define Products and Items, Define Products, Inquire, Product Specifications
Access Requirements	Enter a setID and a product ID.

Product Specifications page

For more information about the Product Specifications page, see the *PeopleSoft Order Management PeopleBook*.

Loading Products From Stage

The Product Load page enables you to load your production tables with rows from your staging tables. To load products, run the application messages PRODUCT_SYNC and PRODUCT_FULLSYNC to populate the staging tables. Then use the Product Load page to populate your production tables.

Product Load Page

Usage	Use the Product Load page to load rows from staging tables to production tables.
Object Name	RUN_OM_LOAD_PROD
Navigation	Define Products and Items, Define Products, Process, Product Load from Stage
Prerequisites	You must have run PRODUCT_SYNC or PRODUCT_FULLSYNC to populate the staging tables. Additionally, the system must have generated an EIP (enterprise integration point) control ID for a row that initially contained faulty data; you should have already corrected that data.
Access Requirements	Enter a run control ID.

Product Load page

The system displays the **Run Control ID** that you entered to access the page.

Report Manager

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

Process Monitor

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

Run

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

For more information about the Report List page, the Process List page, and Process Scheduler, see Process Scheduler Basics.

Transaction Type

Select the transaction type ***PRODUCTMST***.

EIP Control ID

The control ID for the EIP. If you do not select an EIP control ID, the system processes everything in the staging table.

Product Summary Errors


If the system has errors while subscribing to data coming in from another system, the faulty data remains in staging tables; you can correct it online using the Summary Errors page.

Summary Errors Page

Usage	Use the Summary Errors page to navigate to the error pages.
Object Name	RB_EIP_PRODUCTS
Navigation	Define Products and Items, Define Products, Use, Product Summary Errors
Prerequisites	The EIP Control ID must have a status of <i>Error</i> to access the page.
Access Requirements	Enter a transaction type and an EIP control ID.

Summary Errors

Transaction Type: PRODUCTMST **EIP Control ID:** 4000000000000787000000001

Record	Field Name	Long Description
1  PROD_ITEM_MD	EFF_STATUS	Invalid value -- press the prompt button or hyperlink for a list of valid values (15,11)

[Data Maintenance](#)

Summary Errors page

The system displays the **Transaction Type** and **EIP Control ID** that you entered to access the page.



Click the detail button to display the error page for each error.

Record

The record associated with the error.

Field Name

The field name associated with the error.

Long Description

This is a text description of the error.

Data Maintenance

Click this link to display the Data Def Maint (data definition maintenance) page to view the status of the transaction. Once an error is corrected, the status changes from **Error** to **Reprocess** and the error no longer appears on the page.

Data Def Maint Page

Usage	Use the Data Def Maint (data definition maintenance) page to view data detail or correct errors for subscribe messages that contain data rather than transactions.
Object Name	EO_EIP_CTL_MAINT
Navigation	<ul style="list-style-type: none"> Click the Data Maintenance link on the Summary Errors page. Manage Data Exchanges, Process Inbound Transactions, Use, Data Definition Maintenance
Access Requirements	None

Data Def Maint page

Transaction Type

Select the transaction type. For PeopleSoft CRM, select ***PRODUCTMST*** for Product Master. This retrieves product messages that have been received.

SetID

Enter the setID for the transaction.

Queue Based

Select this option to view entries in the Application Messaging Queue.

Stage Table

Select this option to view entries in a stage table.

Status

The status of the message. Valid values are ***Cancelled, Complete, Error, Hold, In Process, Incomplete, New,*** and ***Reprocess.***

Reference

Enter the reference for the message.

CHAPTER 18

Defining Items

Before you can reference an item on an agreement, warranty, or installed product record, define material requirements for a service, use an item to complete work on a service order, or create a return material authorization enabling a customer to return an item, the item must be defined in your PeopleSoft CRM system tables.

The next sections describe methods of item definition, explain how item status is used, and document the pages used to manually define items and view item definitions in your PeopleSoft CRM system.

Understanding Item Definition in PeopleSoft CRM

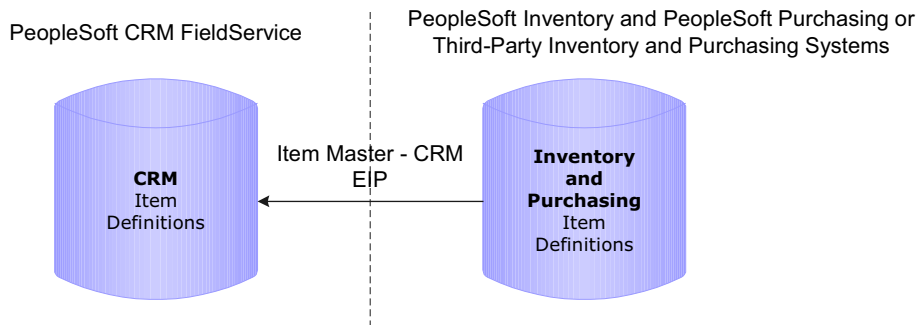
In PeopleSoft CRM, you can define items in your system manually using the Item Definition component or you can synchronize item definition records in your PeopleSoft CRM system tables with item records defined in your inventory and purchasing system using the Item Master - CRM EIP.

Important! To successfully process material management transactions initiated in your PeopleSoft CRM systems in your inventory and purchasing system, the definition of the item on the transaction must be identical in both systems. If you do not use the Item Master CRM - EIP to keep your item information synchronized, you must manually duplicate changes or additions to your item records in both systems. To prevent material management transaction failures due to unsynchronized item data, we strongly recommend implementing the Item Master - CRM EIP.

The Item Master -CRM EIP includes two application messages: ITEM_CRM_FULLSYNC_EFF and ITEM_CRM_SYNC_EFF. At initial implementation, your inventory and purchasing system publishes a full set of item records to your PeopleSoft CRM system using the ITEM_CRM_FULLSYNC_EFF application message. When item definitions in the inventory and purchasing system are added or modified after the initial full synchronization, each addition and change is published to the PeopleSoft CRM system using the ITEM_CRM_SYNC and ITEM_CRM_SYNC_EFF application messages. Note that the PeopleSoft CRM system is a subscriber to these messages, not a publisher. Any changes made to item definitions in PeopleSoft CRM are not published or synchronized with your inventory and purchasing system.

When the messages of the Item Master - CRM EIP are activated, you cannot use the Item Definition component in PeopleSoft CRM to change or add item records in your system. All

updates to item records must be made in your inventory and purchasing system and published to PeopleSoft CRM, as illustrated in the following diagram.



When you synchronize item information with another system using the Item Master - CRM EIP, all changes to item information must be made in the other 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 Inventory and PeopleSoft Purchasing and the events that trigger publication of application messages to update your item tables in the PeopleSoft CRM system, see *PeopleSoft Applications Fundamentals for FSCM PeopleBook*.

Understanding Item Status

Items in your PeopleSoft CRM system tables may have any of the following statuses:

Under Initialization

Indicates that the item definition has not been completed. No transactions are permitted while the item's status is *Under Initialization* and the system will not list the item in any prompts.

Note. PeopleSoft Inventory and PeopleSoft Purchasing do not publish item definition records for items with an *Under Initialization* status. Only items defined in PeopleSoft CRM using the Item Definition component can have this status.

Pending Approval

Indicates that the definition for the item has been completed and is awaiting approval. No transactions are permitted while the item's status is *Pending Approval* and the system will not list the item in any prompts.

Denied Approval

Indicates that the definition for the item has been denied. No transactions are permitted while the item's status is *Denied Approval* and the system will not list the item in any prompts.

Note. In PeopleSoft CRM, item definition approval processing is a manual business process. PeopleSoft Inventory and PeopleSoft Purchasing do not publish item definition records for items with a *Pending Approval* or *Denied Approval* status. Only items defined in PeopleSoft CRM using the Item Definition component can have these status values.

Active

Indicates that the definition for the item is active in your system. Items with an *Active* status are eligible for all item transactions in PeopleSoft CRM.

Hold

Indicates that the definition for the item is on hold in your system. In PeopleSoft CRM, you can receive and report usage and removal for an item with a *Hold* status using the Manage Material component in PeopleSoft CRM FieldService. You can also create a return material authorization (RMA) for customers returning the item using the RMA Form component in PeopleSoft CRM Support. However, you cannot request the quantity of the item using Manage Material component, nor can you create replacement orders for the item using the RMA Form component.

Inactive

Indicates that the definition for the item is no longer active in your system. In PeopleSoft CRM, you can receive and report usage and removal for an item with an *Inactive* status using the Manage Material component in PeopleSoft CRM FieldService. You can also create a return material authorization (RMA) for customers returning the item using the RMA Form component in PeopleSoft CRM Support. However, you cannot request the quantity of the item using Manage Material component, nor can you create replacement orders for the item using the RMA Form component.

Discontinue

Indicates that usage of the item is being phased out. In PeopleSoft CRM, you can receive and report usage and removal for an item with a *Discontinue* status using the Manage Material component in PeopleSoft CRM FieldService. You can also create a return material authorization (RMA) for customers returning the item using the RMA Form component in PeopleSoft CRM Support. However, you cannot request the quantity of the item using Manage Material component, nor can you create replacement orders for the item using the RMA Form component.

For more information about the Manage Material component, see Managing Service Order Material Requirements in the *PeopleSoft CRM FieldService PeopleBook*. **For more information** about the RMA Form component, see Managing Material Returns in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook*. **For more information** about how item status is used in PeopleSoft Inventory and PeopleSoft Purchasing, see *PeopleSoft Applications Fundamentals for FSCM PeopleBook*.

Defining Item Controls Values in PeopleSoft CRM

Item records defined in your PeopleSoft CRM system can be organized or grouped using many different characteristics known as *attributes*. To set up item attributes, use the pages in the Define Item Controls menu. Once defined, these attributes become selection options or default values on the pages of the Item Definition component, where you can manually define item records for your PeopleSoft CRM system.

The next sections document the pages in the Define Item Controls menu in PeopleSoft CRM.

Note. The pages in the Define Item Controls menu in PeopleSoft CRM are used only if you do not synchronize with PeopleSoft Supply Chain Management applications, including PeopleSoft Inventory and PeopleSoft Purchasing.

Item Number Control Page

Usage	Use the Item Number Control page to define whether new items are sequentially numbered or numbered manually. Note. The item number controls that you define on this page are used for PeopleSoft CRM purposes only. If you synchronize item master information with another system, the Item Master - CRM EIP application messages will not update item number control information.
Object Name	ITEM_NBR_CONTROL
Navigation	Define Products and Items, Define Item Controls, Use, Item Number Control
Access Requirements	Enter a setID.

Item Number Control	
SetID:	CRM01 Appliance
<input checked="" type="checkbox"/> Auto Number Items	Last Item Number Assigned: 000000000000000001

Item Number Control page

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

Auto Number Items

Indicates whether automatic numbering for items has been enabled. When automatic numbering is enabled, you can accept the system-generated *NEXT* value as the ID for each item that you define. Even if automatic numbering is enabled, you can override the *NEXT* value by manually entering item IDs .

Note. If you do not select the **Auto Number Items** check box, you must manually enter an ID when defining new items on the Item Definition page, which is documented later in this chapter.

Last Item Number Assigned

Indicates the start of the numbering sequence that your system will use to generate unique item IDs automatically. When you select *NEXT* as the item ID during the item definition process, your system assigns the next sequential number in this numbering sequence as the item ID.

Item Groups Page

Usage	Use the Item Groups page to define groups that items can be assigned to during the item definition process. Item group can be used as an alternate search key for item ID. Note. The item groups that you define on this page are used for PeopleSoft CRM purposes only. If you synchronize item master information with another system, the Item Master - CRM EIP application messages will not update item group information.
Object Name	INV_ITEM_GROUP
Navigation	Define Products and Items, Define Item Controls, Use, Item Groups
Access Requirements	Enter a setID and an item group.

Item Groups

SetID: CRM01 Item Group: HARDWARE

Find | View All First 1 of 1 Last

*Effective Date:	04/12/2001	*Status:	Active
*Description:	Computer Hardware		
Short Description:	Hardware		

Item Groups page

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

The scroll area displays the effective-dated rows associated with the item group definition record.

Effective Date

Indicates the date on which the item group definition record goes into effect in your system. Effective dates enable you to keep historical, current, and future information in tables. For new rows, the system automatically sets the effective date to the current date, which you can override as necessary.

For more information about effective dates, see Understanding Effective Dates in the *Using PeopleSoft Applications PeopleBook*.

Status

The current status of the item group definition record.

Active: Indicates that the record is available for use in your system.

Inactive: Indicates that the record is not available for use in your system. Inactive item groups do not appear as options on any system prompts.

Description

A long description of the item group. When you define a new effective-dated row, you can enter an item group description using up to 30 alphanumeric characters.

Short Description

A short description of the item group. When you define a new effective-dated row, you can enter an item group description using up to 10 alphanumeric characters.

Item Families Page

Usage	Use the Item Families page to define families that items can be assigned to during the item definition process. Item family can be used as an alternate search key for item ID. Note. The item families that you define on this page are used for PeopleSoft CRM purposes only. If you synchronize item master information with another system, the Item Master - CRM EIP application messages will not update item family information.
Object Name	PROD_FAMILY_INV
Navigation	Define Products and Items, Define Item Controls, Use, Item Families
Access Requirements	Enter a setID and an item family.

Item Families

SetID: CRM01 Family: DRYERS

Find | View All First 1 of 1 Last

*Effective Date: 04/24/2001 *Status: Active

*Description: Gas and Electric Dryers

Short Description: Dryers

Item Families page

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

The scroll area displays the effective-dated rows associated with the item family definition record.

Effective Date

Indicates the date on which the item family definition record goes into effect in your system. Effective dates enable you to keep historical, current, and future information in tables. For new rows, the system automatically sets the effective date to the current date, which you can override as necessary.

For more information about effective dates, see Understanding Effective Dates in the *Using PeopleSoft Applications PeopleBook*.

Status

The current status of the item family definition record.

Active: Indicates that the record is available for use in your system.

Inactive: Indicates that the record is not available for use in your system. Inactive item families do not appear as options on any system prompts.

Description

A long description of the item family. When you define a new effective-dated row, you can enter an item group description using up to 30 alphanumeric characters.

Short Description

A short description of the item family. When you define a new effective-dated row, you can enter an item group description using up to 10 alphanumeric characters.

Stock Types Page

Usage	Use the Stock Types page to create ownership information codes for inventory items that are leased or consigned. You must specify stock types for any non-owned items that you define on the Item Definition page, which is documented later in this chapter. Note. The stock types that you define on this page are used for CRM purposes only. If you synchronize item master information with another system, the Item Master - CRM EIP application messages will not update stock type information.
Object Name	INV_STOCK_TYPE
Navigation	Define Products and Items, Define Item Controls, Use, Stock Types
Access Requirements	Enter a setID and a stock type.

Stock Types

SetID: CRM01 Stock Type: CONS

Find | View All First 1 of 1 Last

*Effective Date:	04/24/2001	*Status:	Active	+	-
*Description:	Consignment Inventory				
Short Description:	Consign				
Stock Owner:	Supplier Systems Company				

Stock Types page

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

The scroll area displays the effective-dated rows associated with the stock type definition record.

Effective Date

Indicates the date on which the stock type definition record goes into effect in your system. Effective dates enable you to keep historical, current, and future information in tables. For new rows, the system automatically sets the effective date to the current date, which you can override as necessary.

	<p>For more information about effective dates, see Understanding Effective Dates in the <i>Using PeopleSoft Applications PeopleBook</i>.</p>
Status	<p>The current status of the stock type definition record.</p> <p>Active: Indicates that the record is available for use in your system.</p> <p>Inactive: Indicates that the record is not available for use in your system. Inactive stock types do not appear as options on any system prompts.</p>
Description	<p>A long description of the stock type. When you define a new effective-dated row, you can enter a stock type description using up to 30 alphanumeric characters.</p>
Short Description	<p>A short description of the stock type. When you define a new effective-dated row, you can enter a stock type description using up to 10 alphanumeric characters.</p>
Stock Owner	<p>Indicates the legal owner of items associated with this stock type. When you define a new effective-dated row, you can enter the name of the owner using up to 30 alphanumeric characters.</p>

Defining and Maintaining PeopleSoft CRM Items

If you are not synchronizing item information with another system, you must manually define the items used in your PeopleSoft CRM system using the Item Definition component. If you are synchronizing with another system using the Item Master - CRM EIP, you can view the current definition for an item in your Peoplesoft CRM system tables using the Item Definition component in the Inquiry menu.

The next sections document the pages of the Item Definition component in PeopleSoft CRM.

Item Definition Page

Usage	<p>From the Use menu, use the Item Definition page to define an inventory item at the setID level. From the Inquiry menu, use the Item Definition page to view the inventory item definitions in the PeopleSoft CRM system tables.</p> <p>For more information about defining items in your PeopleSoft CRM system, see Understanding Item Definition in PeopleSoft CRM in this chapter.</p>
Object Name	RF_ITEM_DEFN
Navigation	<ul style="list-style-type: none"> • Define Products and Items, Define Items, Use, Item Definition • Define Products and Items, Define Items, Inquire, Item Definition
Access Requirements	Enter a setID and an item ID.

Note. Item IDs cannot have embedded spaces or special characters.

If you use automatic numbering for your items on the Item Number Control page, you can leave the item ID as *NEXT* to assign the next sequential number or you can enter an item ID manually. The item ID is used as the primary search key for the item master table. **For more information** about the Item Number Control page, see Defining Item Controls Values in PeopleSoft CRM in this chapter.

The screenshot displays the 'Item Definition' page with the 'Substitutes' tab selected. The form contains the following fields and options:

- SetID:** CRM01, **Item ID:** SR11020
- Description:** 17.8 cu. Ft. Chest Freezer Manual Defrost
- Short Desc:** 17.8 cu. F
- Current Status Date:** 04/24/2001, **Current Status:** Under Init
- Std UOM:** EA, Each
- Stock Type:** FREEZERS
- Item Group:** MANUAL DEF
- Family:**
- Item Type:** ☒ Inventory Item, ☐ Non-Owned Item, ☐ Consigned
- Item Tracking:** ☐ Lot Control, ☒ Serial Control, ☐ Shipping Serial Control
- Item Usage:** ☒ Serviceable, ☒ Returnable, ☐ Consumable
- Product Options:** ☒ Create Product, ☒ Use Item ID, **Product ID:** SR11020
- Configuration Options:** ☐ Distribution Configuration, **Distribution Tree:**, ☐ Configuration Code Generation, **Template:**
- Warranty Information:** **Warranty Name:**, **Status:** Active
- Last Modified:** 04/24/2001 2:53PM PDT DVP1

Item Definition page

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

Basic Item Information

Description

The long description of the item. When defining a new item, you can enter a long description using up to 60 alphanumeric characters. You cannot include embedded single or double quotation marks in the description text.

Short Desc (short description)

The short description of the item. When defining a new item, you can enter a short description using up to 10 alphanumeric characters. You cannot include embedded single or double quotation marks in the description text.

Current Status Date	The date that the current status of the item definition was updated. If the item status is modified, the system automatically updates the current status date to reflect the date of the change. The Current Status Date field is not available for direct entry.
Current Status	The current status of the item. For more information about item status values, see Understanding Item Status in this chapter.
Std UOM (standard unit of measure)	The base unit of measure for the item. When defining new items, select a standard unit of measure that reflects the smallest, transactable unit of measure for the item. Units of measure must first be established on the Units of Measure page in the General Options menu before they are available for selection here. Warning! To minimize rounding discrepancies when using multiple units of measure, we strongly recommend that your standard UOM be the smallest valid UOM for the item. We also recommend that the standard UOM be set up as a whole number. For more information about the Units of Measure page in the General Options menu, see the Setting General Options chapter.
Stock Type	Identifies the owner of the stock if the item is non-owned. Stock types must first be established on the Stock Type page, which is documented earlier in this chapter.
Item Group	A group identifier that can be used to categorize the item as an alternate search key. Item groups must first be established on the Item Groups page, which is documented earlier in this chapter.
Family	A group identifier that can be used to categorize the item as an alternate search key. Item families must first be established on the Item Families page, which is documented earlier in this chapter.
Product Options	
When you access the page in Add mode or select an item with a current definition status of Under Init (under initialization), the system displays the Product Options group box. The check boxes in the group box establish whether a corresponding product definition should be created simultaneously with the item definition.	
Create Product	Indicates whether a corresponding product definition should be created in your system. Select this check box if your enterprise uses product IDs.

Use Item ID Indicates whether the product ID should be the same as the item ID. If you select the option, the **Product ID** field becomes unavailable for entry and displays the ID established for the item.

Product ID Indicates the identification that will be used for the product definition. If you do not select the **Use Item ID** check box, you can enter a **Product ID** or, if you have set up automatic numbering for your products, you can enter a value of *NEXT*.

Item Type

The check boxes in the **Item Type** group box indicate whether the item is physically stocked in inventory, owned by the business unit, or represents consignment stock in the inventory warehouse.

Note. After an order for the item is initiated from the RMA Form component or the Manage Material component, the system does not allow values in the **Item Type** group box to be modified.

For more information about the RMA Form component, see Managing Material Returns in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook*. **For more information** about the Manage Material component, see Managing Service Order Material Requirements in the *PeopleSoft CRM FieldService PeopleBook*.

Inventory Item Indicates whether the item is physically stocked in inventory. You cannot create transactions in PeopleSoft Inventory for non-inventory items.

Non-Owned Item Indicates whether the item is owned or non-owned. PeopleSoft Inventory does not create accounting entries for non-owned item transactions. If you define an item as non-owned, you must also specify a stock type for the item.

Consigned Indicates whether the item is a consigned item. Only non-owned items can be defined as consigned items.

Item Tracking

The check boxes in the **Item Tracking** group box indicate how the item is tracked for material management purposes.

Note. After an order for the item is initiated from the RMA Form component or the Manage Material component, the system does not allow values in the **Item Tracking** group box to be modified.

For more information about the RMA Form component, see Managing Material Returns in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook*. **For more information** about the Manage Material component, see Managing Service Order Material Requirements in the *PeopleSoft CRM FieldService PeopleBook*.

Lot Control

Indicates whether the item is tracked by lot ID.

In PeopleSoft CRM FieldService you must enter the lot ID for transactions of lot-controlled items initiated on the Manage Material page and when defining installed product records for lot-controlled items on the Installed Product page.

For more information about transactions on the Manage Material page, see Managing Service Order Material Requirements in the *PeopleSoft CRM FieldService PeopleBook*. **For more information** about installed products, see the Tracking Installed Products chapter.

In PeopleSoft CRM Support, you may enter the lot ID for advanced return RMA transactions of lot-controlled items; however, it is not required.

For more information about RMA transactions, see Managing Material Returns in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook*.

In PeopleSoft Inventory, you must enter the lot ID at the time of receipt and putaway and for all inventory movement transactions of lot-controlled items.

For more information about transactions of lot-controlled items in PeopleSoft Inventory, see the *PeopleSoft Inventory PeopleBook*.

Serial Control

Indicates whether each unit of the item in stock is tracked by a unique identifier. Serial-controlled inventory items are managed in units of one based on the item's standard unit of measure.

In PeopleSoft CRM FieldService you must enter the serial ID for transactions of serial-controlled items initiated on the Manage Material page and when defining installed product records for serial-controlled items on the Installed Product page.

For more information about transactions on the Manage Material page, see Managing Service Order Material Requirements in the *PeopleSoft CRM FieldService PeopleBook*. **For more information** about installed products, see the Tracking Installed Products chapter.

In PeopleSoft CRM Support, you must enter the serial ID for advanced return RMA transactions of serial-controlled items.

For more information about RMA transactions, see Managing Material Returns in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook*.

In PeopleSoft Inventory, you must enter the serial ID at the time of receipt and putaway and for all inventory movement transactions of serial-controlled items.

For more information about transactions of serial-controlled items in PeopleSoft Inventory, see the *PeopleSoft Inventory PeopleBook*.

Shipping Serial Control

Indicates whether a unique identifier is assigned to each unit of the item at the time of shipment. Ship-serial-controlled items can be moved throughout the PeopleSoft Inventory business unit without serial control, which simplifies transaction processing and entry. Serial numbers are then assigned at the time of shipment to provide serial tracking on products shipped to customers, internal locations, and other PeopleSoft Inventory business units.

When a user records the quantity received, used, not used and removed for a ship-serial-controlled item on the Manage Material page in PeopleSoft CRM, you must enter the ship-serial ID. The PeopleSoft CRM system uses the ship-serial ID to accurately update the customer's installed product record.

For more information about transactions of ship-serial-controlled items in PeopleSoft Inventory, see *PeopleSoft Inventory PeopleBook*. **For more information** about transactions on the Manage Material page, see Managing Service Order Material Requirements in the *PeopleSoft CRM FieldService PeopleBook*. **For more information** about installed products, see the Tracking Installed Products chapter.

Item Usage

The check boxes in the **Item Usage** group box provide information that is used to ensure that an item is valid for a particular business process.

Serviceable

Indicates whether the item can be defined for a service or selected on a service order. Non-serviceable items cannot be specified in the Service component or the Service Order component.

For more information about the Service component, see Setting Up Your Services in the *PeopleSoft CRM FieldService PeopleBook*. **For more information** about the Service Order component, see Creating and Managing Service Orders in the *PeopleSoft CRM FieldService PeopleBook*.

Returnable	Indicates whether the item can be returned, for informational purposes only.
Consumable	Indicates whether an item can be scrapped rather than returned. When the removal of a consumable item is recorded in the Manage Material component, the system does not trigger any inventory adjustment transactions. However, the system updates the customer's installed product record to reflect the removal of the installed item. For more information about transactions on the Manage Material page, see Managing Service Order Material Requirements in the <i>PeopleSoft CRM FieldService PeopleBook</i> . For more information about installed products, see the Tracking Installed Products chapter.

Note. In the RMA Form and Manage Material components, the system permits you to select items regardless of the setting of the **Serviceable**, **Returnable**, and **Consumable** check boxes.

Configuration Options

If your implementation includes PeopleSoft Configurator, the check boxes in the **Configuration Options** group box define the configuration attributes for the item.

Distribution Configuration	Indicates whether the item is part of a distribution configuration.
Distribution Tree	The name of the rule tree in PeopleSoft Configurator used to select the configuration rules to process for this item. If you indicate that an item is part of a distribution configuration, you must also specify the distribution tree.
Configuration Code Generation	Indicates whether the system automatically generates configuration codes based on the specified template. Configuration codes can be used only for items that are lot controlled and are designated for distribution configuration. You cannot change an item's configuration options to use configuration codes if there has been activity in the system for the item (such as inventory balances, customer orders, and so forth).
Template	The name of the template defined in PeopleSoft Configurator used to generate configuration codes.

For more information about configuration options, see the PeopleSoft Configurator PeopleBook.

Warranty Information

The **Warranty Information** grid tracks the warranty plans associated with the item.

Warranty Name	The name of the warranty associated with the item. Warranties must first be established on the Warranty page.
Status	The current status of the warranty: Active or Inactive . An item can have only one Active warranty.

For more information about warranties, see the Setting Up and Managing Agreements and Warranties chapter.

The **Last Modified** field displays a time stamp showing when the item definition record was updated and the user ID of the person who made the change.

Substitutes Page

Usage	Use the Substitutes page to establish a substitution definition for an item. An item substitution definition specifies alternate items that may be used by personnel requesting stock for activities on cases or service orders. In PeopleSoft CRM, you can view an item's substitution definition from the RMA Form component in PeopleSoft CRM Support and from the Manage Material component in PeopleSoft CRM FieldService. For more information about the Manage Material component, see Managing Service Order Material Requirements in the <i>PeopleSoft CRM FieldService PeopleBook</i> . For more information about the RMA Form component, see Managing Material Returns in the <i>PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook</i> .
Object Name	RF_ITEM_SUB
Navigation	<ul style="list-style-type: none"> • Define Products and Items, Define Items, Use, Item Definition • Define Products and Items, Define Items, Inquire, Item Definition
Access Requirements	Click the Substitutes tab.

Substitutes page

The system displays the **SetID**, **Item ID**, and **Description** defined on the Item Definition page.

Substitute Items

The **Substitute Items** grid lists the valid substitution options currently defined for the item displayed at the top of the page.

Priority	The preference order for the substitution list. For each substitute item that you add, enter a priority value. The substitute item with the highest priority (the lowest number) should be the first choice when substitutions are made. Priority doesn't need to be sequential, though it must be greater than 0.
Sub Item (substitute item)	The item ID of the substitute item. For each new substitute item that you define, select an appropriate item ID. The Description automatically appears by default.
From Date	The date that the substitute item becomes a valid substitution option. The default value is the current date, but you can modify the date as necessary.
To Date	The date that the substitute item is no longer a valid substitution option. The default value is December 31, 2099, but you can modify the date as necessary.
Rate	The quantity of the substitute item that is required to replace the original item. The default conversion rate is 1, but you can modify the value as necessary. Conversion rates are calculated using the item's standard unit of measure.
Use for Shipments	Indicates whether the substitute item is valid for material stock requests during the picking process in your inventory system.

Associating Items With Units of Measure

When you create an item in the Item Definition component, you define a standard UOM (unit of measure) for the item. Depending upon your business needs, you might want to define additional units of measure for transactions involving this item. For example, if you order an

item by the case but ship it in individual units, you'll want two additional units of measure: a shipping UOM (each), and an ordering UOM (case). When multiple units of measure apply to a given item, PeopleSoft maintains conversion rates to facilitate processing.

Note. When an item is defined using the Item Definition component in PeopleSoft CRM, the system automatically insert a row into the units of measure table with the standard UOM set up as a valid ordering, stocking, and shipping UOM. The Item Definition component is documented earlier in the chapter.

Units of Measure Page

Usage	<p>Use the Units of Measure page to assign a unit of measure (UOM) to an item. In PeopleSoft CRM, the system prompts for product UOMs only display UOMs that are defined as valid ordering UOMs. In PeopleSoft CRM FieldService and PeopleSoft CRM Support, all item transactions are performed using the item's standard unit of measure. All other fields on this page are applicable only in the PeopleSoft Supply Chain Management environment.</p> <p>For more information about the Product Definition component, see the Setting Up Products chapter. For more information about how item UOM is used in the PeopleSoft Supply Chain Management environment, including PeopleSoft Inventory and PeopleSoft Purchasing, see <i>PeopleSoft Application Fundamentals for FSCM PeopleBook</i>.</p>
Object Name	INV_ITEM_UOM
Navigation	Define Products and Items, Define Items, Use, Units of Measure
Access Requirements	Enter a setID and item ID.

Units of Measure

SetID: CRM01 Item ID: SR11020
17.8 cu. Ft. Chest Freezer Manual Defrost

Convert To
Standard Unit of Measure: EA Each

Convert From Find | View All First 1 of 1 Last

*Unit of Measure: EA Each
*Conversion Rate: 1.00000000
*Quantity Precision: Whole Nbr
☒ Default Stocking UOM

Rounding Rule
☒ Natural Round ☐ Round Up

Unit of Measure Type	Find View All	First	1-3 of 3	Last
Ordering				
Shipping				
Stocking				

Units of Measure page

The system displays the **SetID** and **Item ID** that you entered to access the page, along with the item description.

Convert To

The **Standard Unit of Measure** defined for this item on the Item Definition page appears in the **Convert To** group box.

For more information about the Item Definition page, see Defining and Maintaining PeopleSoft CRM Items.

Convert From

In the **Convert From** group box, select a **Unit of Measure**. Units of measure must be established on the Units of Measure page in the General Options menu before they are available for selection here.

For more information about the Units of Measure page in the General Options menu, see the Setting General Options chapter.

Note. In PeopleSoft CRM FieldService, the system uses the item's standard UOM for all item transactions initiated from the Manage Material component. Similarly, in PeopleSoft CRM Support, the system uses the item's standard UOM only for return material authorization (RMA) and replacement transactions initiated from the RMA component.

For more information about transactions on the Manage Material page, see Managing Service Order Material Requirements in the *PeopleSoft CRM FieldService PeopleBook*. **For more information** about RMA transactions, see Managing Material Returns in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook*.

If you specified a **Conversion Rate** between this UOM and the standard UOM on the Unit of Measure Page, that default value appears here. You can override the default by entering a different rate. If you have not already specified a conversion rate, you must establish one here.

To determine what conversion rate to enter, consider the relationship between the UOM with which you are working and the standard UOM. The following example assumes a previously established default conversion rate, but you'll use the same logic whether or not a default has been specified. Suppose the standard UOM for an item is **EA** (each) and the unit of measure established on the Unit of Measure page is **CS** (case), with a conversion rate of **5** between CS and EA. If CS is a valid UOM for the item, when you insert a row and specify **CS**, the conversion rate is automatically set to **5**. If one CS of your new item contains 20 EA, set the conversion rate to **20**.

The **Quantity Precision** rule is specific to PeopleSoft Supply Chain Management environments and is not used in PeopleSoft CRM.

For more information about the *Decimal* and *Whole Nbr* (whole number) values and how quantity precision is used in PeopleSoft Supply Chain Management environments, including PeopleSoft Inventory and PeopleSoft Purchasing, see *PeopleSoft Application Fundamentals for FSCM PeopleBook*.

Rounding Rule

The **Rounding Rule** is specific to PeopleSoft Supply Chain Management environments and is not used in PeopleSoft CRM.

For more information about the **Natural Round** and **Round Up** fields and how rounding rules are used in PeopleSoft Supply Chain Management applications, see *PeopleSoft Application Fundamentals for FSCM PeopleBook*.

Unit of Measure Type

In the **Unit of Measure Type** group box, indicate which kinds of transactions use the selected unit of measure. You must select at least one UOM type for each item from the following values.

Ordering

The UOM is used for stock requests or for express issue transactions in PeopleSoft Inventory. The ordering UOM is also used by PeopleSoft Order Management. In PeopleSoft CRM, the system prompts for product UOMs only display UOMs that are defined as valid ordering UOMs.

Shipping

The UOM is used for shipping/issues transactions in PeopleSoft Inventory.

Stocking

The UOM is used for any putaway or receiving transaction in PeopleSoft Inventory. This UOM can also be used for numerous other transactions in PeopleSoft Inventory, including transfers, container management, adjustments, picking, and physical accounting.

For more information about UOM types, see *PeopleSoft Application Fundamentals for Financials, Distribution, and Manufacturing PeopleBook*.

When you first define an item-UOM combination, only one field appears in the **Unit of Measure Type** group box. To add a second UOM type, click the **Add** button in this group box. If the selected unit of measure is valid for all transactions involving this item, click the **Select All** button. If the selected unit of measure is no longer valid for a given transaction, click the **Deselect All** button to clear the UOM type fields, then insert valid transactions.

To associate the item with additional units of measure, click the **Add** button to the right of the **Unit of Measure Type** group box.

CHAPTER 19

Working With Item Assemblies

In PeopleSoft CRM, you can define item service assemblies to identify the components of an item that your organization can service or support using the Assemblies Maintenance component. Once defined in your system, technicians or call center agents can reference the service assembly definition using the Item Assemblies Inquiry component to help drive troubleshooting and service activities.

The following sections describe how item service assemblies can be implemented and document the pages of the Assemblies Maintenance and the Assemblies Inquiry components.

Understanding Item Assemblies in PeopleSoft CRM

For every item within a setID in your system, you can define the serviceable component items using the pages of the Assemblies Maintenance component. If necessary, you can define service assemblies for a component item, creating service assemblies with multiple levels. Before you can define a service assembly, however, the item and all of its component items must be defined in your system.

For more information about creating item definitions in your system, see the Defining Items chapter.

For each assembly that you define for an item in a given setID, you can define multiple versions of the assembly using assembly codes. You use assembly codes to support different assemblies for an item within a setID. For example, suppose you have a radio, item B12654, that is sold and serviced in the United States and Great Britain. You can define two different assembly codes for the item to reflect the different power supply components.

In addition to identifying serviceable components for an item, technicians and call center agents can also use the service assemblies to check for manufacturers' warranties on the component parts of an item installed at the customer's site. In PeopleSoft CRM, warranties offered by your organization can be activated for installed products; however, this warranty information is for the end item itself on the installed product record—not for any of the component items. You can check for warranties offered for the component item by your company on the Assemblies Inquiry - Components page. If a manufacturer or another third party offers a warranty on a component item, you can make a note of it on the Assemblies Maintenance - Component Notes page.

The Assemblies Inquiry - Components page and the Assemblies Maintenance - Component Notes page are documented later in this chapter. **For more information** about warranties, see the Setting Up and Managing Agreements and Warranties chapter.

Assemblies Maintenance - Summary Page

Usage	Use the Assemblies Maintenance - Summary page to define and maintain the serviceable components for a given combination of setID and item. Technicians and customer service representatives can view the components currently defined for an item using the Assemblies Inquiry pages, which are documented later in this chapter.
Object Name	EN_BOM_MAINT
Navigation	Define Products and Items, Define Items, Use, Assemblies Maintenance
Access Requirements	Enter a setID, item ID, an assembly type of <i>Service</i> , and an assembly code. The assembly code indicates the version of the service assembly for a given combination of setID and item. If necessary, you can define up to 99 service assemblies per setID-item combination. Note. Although other assembly types are available, for PeopleSoft CRM applications, only the <i>Service</i> assembly type is applicable.

Summary Assembly Components Component Notes

SetID: CRM01
 Item ID: SR1020 17.8 cu. Ft. Chest Freezer Manual Defrost
 Type: Service Assembly Code: 1 Serial Control ☒
 Assembly Qty: 1 EA

Find | View All First 1-4 of 4 Last

*Component ID	Description	Op Seq	*Effective Date	*Obsolete Date	Quantity	UOM	*Per
10000	Refrigerator, Plastic Bins	0	04/25/2001	04/25/2003	2.0000	EA	ASY
10001	Refrigerator, Shelves	0	04/25/2001	04/25/2003	4.0000	EA	ASY
10003	Refrigerator, Ice Dispenser Assembly Unit	0	04/25/2001	04/25/2003	1.0000	EA	ASY
10004	Refrigerator, Compressor	0	04/25/2001	04/25/2003	1.0000	EA	ASY

Assemblies Maintenance - Summary page

The system displays the **SetID**, **Item ID**, assembly **Type** of *Service*, and **Assembly Code** that you entered to access the page. The **Serial Control** check box indicates whether the selected item is serial-controlled.

Assembly Quantity

The **Assembly Qty** (assembly quantity) represents the end item quantity in the item's standard unit of measure as defined on the Item Definition page. In general, set the **Assembly Qty** to *1* and enter the component quantity included in one unit of the end item. However, if you typically install and service the end item in quantities greater than one, you might want to define your service assembly in terms of the normal installation and service quantity. For

example, although a manufacturer and distributor of speakers might produce and stock speakers in inventory as single units, the minimum order quantity might be two units. Because a customer always buys at least two speakers at a time, the speaker company might choose to set up a service assembly with an **Assembly Qty** of 2.

For more information about the Item Definition page, see the Defining Items chapter.

Components Grid

The grid lists the service assembly components included in the selected item.

Component ID

The identification of the service assembly component. The component must first be established as an active item in your system using the Item Definition page or the Item Master - CRM EIP. In addition, the component item must conform to the following restrictions:

- The component item cannot be the same as the end item.
- The effectivity period, specified for the component by the **Effective Date** and the **Obsolete Date**, cannot overlap with other rows for the same component ID.

For more information about item definition, see the Defining Items chapter.

Description

The description of the component item.

Op Seq (operation sequence)

The sequence in which the component is assembled. The system sets the value to zero by default, but this value can be modified as necessary. This value is informational in PeopleSoft CRM. Operation sequence is used primarily in PeopleSoft Manufacturing environments.

For more information about operation sequence in PeopleSoft Manufacturing, see *PeopleSoft Bills and Routings PeopleBook*.

Effective Date

The date on which the component becomes part of the service assembly for the item. On the Assemblies Inquiry pages, you can display only the components with effective dates equal to or prior to the current date or all components regardless of their effective dates.

Obsolete Date

The date on which the component is removed from the service assembly for the item. On the Assemblies Inquiry pages, you can display only the components with obsolete dates that are greater than the current date or all components regardless of their obsolete dates.

Quantity

The quantity of the component required **Per Asy** (assembly) or **Per Ord** (order) of the end item in the item's standard unit of measure defined for the component item. The quantity is used primarily in PeopleSoft Manufacturing environments.

For more information about operation sequence in PeopleSoft Manufacturing, see *PeopleSoft Bills and Routings PeopleBook*.

Per

Indicates whether the component **Quantity** is defined in terms of the **ASY** (assembly) or the **ORD** (order).

Assemblies Maintenance - Assembly Page

Usage	Use the Assemblies Maintenance - Assembly page to describe the service assembly and record any applicable notes.
Object Name	EN_BOM_TEXT
Navigation	Define Products and Items, Define Items, Use, Assemblies Maintenance
Access Requirements	Select the Assembly tab.

Summary Assembly Components Component Notes

SetID: CRM01
 Item ID: SR1020 17.8 cu. Ft. Chest Freezer Manual Defrost
 Type: Service Assembly Code: 1 Serial Control ☒
 Assembly Qty: 1 EA
 Description:
 Short Desc:
 Assembly Note:
 Last Modified: 04/25/2001 11:15AM PDT DVP1

Assemblies Maintenance - Assembly page

The system displays the same **SetID**, **Item ID**, assembly **Type**, **Assembly Code**, **Assembly Qty** (assembly quantity), and **Serial Control** information as on the Assemblies Maintenance - Summary page.

The remaining fields capture descriptive information about the service assembly.

Description

A long description of the service assembly. Enter a long description using up to 30 alphanumeric characters.

Short Desc (short descriptions)

A short description of the service assembly. Enter a short description using up to 30 alphanumeric characters.

Assembly Note

Any notes recorded about the service assembly. Enter comments using up to 256 alphanumeric characters.

Assemblies Maintenance - Components Page

Usage	Use the Assemblies Maintenance - Components page to view or modify details about each component listed on the Assemblies Maintenance - Summary page.
Object Name	EN_COMP_MAINT
Navigation	Define Products and Items, Define Items, Use, Assemblies Maintenance
Access Requirements	Select the Components tab.

Assemblies Maintenance - Components page

The system displays the same **SetID**, **Item ID**, assembly **Type**, **Assembly Code**, **Assembly Qty** (assembly quantity), and **Serial Control** information as on the Assemblies Maintenance - Summary page.

Component

The **Component** scroll area displays the service assembly components for the selected item.

Component ID

The identification of the service assembly component. The system automatically populates the description of the component item.

Op Seq (operation sequence)

The sequence in which the component is assembled. The system sets the value to zero by default, but this value can be modified as necessary. This value is informational in PeopleSoft CRM. Operation sequence is used primarily in PeopleSoft Manufacturing environments.

For more information about operation sequence in PeopleSoft Manufacturing, see the *PeopleSoft Bills and Routings PeopleBook*.

Quantity

The quantity of the component required **Per Asy** (assembly) or **Per Ord** (order) in the item's standard unit of measure defined for the component item.

Per

Indicates whether the component **Quantity** is defined in terms of the **ASY** (assembly) or the **ORD** (order).

Assemblies Maintenance - Component Notes Page

Usage	Use the Assemblies Maintenance - Component Notes page to view or record notes related to a specific component on a service assembly.
Object Name	EN_COMP_TEXT
Navigation	Define Products and Items, Define Items, Use, Assemblies Maintenance
Access Requirements	Select the Component Notes tab.

Summary Assembly Components Component Notes

SetID: CRM01
Item ID: SR1020 17.8 cu. Ft. Chest Freezer Manual Defrost
Type: Service Assembly Code: 1 Serial Control ☒
Assembly Qty: 1 EA

Component View All First 1 of 4 Last

*Component ID: 10000 Op Seq: 0
Refrigerator, Plastic Bins

Component Note:

Last Modified: 04/25/2001 11:15AM PDT DVP1

Assemblies Maintenance - Component Notes page

The system displays the same **SetID**, **Item ID**, assembly **Type**, **Assembly Code**, **Assembly Qty** (assembly quantity), and **Serial Control** information as on the Assemblies Maintenance - Summary page.

Component

The **Component** scroll area displays the following information for each component defined for the service assembly:

Component ID	The identification of the service assembly component. The system automatically populates the description of the component item.
Op Seq (operation sequence)	The sequence in which the component appears in the assembly structure.
Component Note	Any notes recorded about the component. You can enter comments using up to 256 alphanumeric characters.

Assemblies Inquiry - Summary Page

Usage	Use the Assemblies Inquiry - Summary page to view the serviceable components defined for a given combination of setID and item.
Object Name	EN_BOM_INQUIRY
Navigation	Define Products and Items, Define Items, Inquire, Assemblies Inquiry
Prerequisites	A service assembly must first be established using the Assemblies Maintenance Component before it can be viewed with the Assemblies Inquiry component.

Summary
Assembly
Components
Component Notes

SetID: CRM01
*Item ID: SR1020 17.8 cu. Ft. Chest Freezer Manual Defrost
*Assembly Type: Service
*Assembly Code: 1
As of Date: 04/25/2001
Show All Components
Assembly Qty: 1 EA
Depth: 2
*Display: Indented
Search

Lvl	Component ID	Description	Effective Date	Obsolete Date	Quantity	UOM	Per	Serial Control
1	10000	Refrigerator, Plastic Bins	04/25/2001	04/25/2003	2.0000	EA	ASY	<input type="checkbox"/>
1	10001	Refrigerator, Shelves	04/25/2001	04/25/2003	4.0000	EA	ASY	<input type="checkbox"/>
1	10003	Refrigerator, Ice Dispenser Assembly Unit	04/25/2001	04/25/2003	1.0000	EA	ASY	<input type="checkbox"/>
2	...10002	Refrigerator, Ice Trays	05/03/2001	05/03/2003	2.0000	EA	ASY	<input type="checkbox"/>
1	10004	Refrigerator, Compressor	04/25/2001	04/25/2003	1.0000	EA	ASY	<input checked="" type="checkbox"/>

Assemblies Inquiry - Summary page

The system populates the grid on this page with the service assemblies that meet the criteria that you enter at the top of the page. After you enter search criteria, click the **Search** button to populate the grid with the service assemblies that meet your criteria. The system displays the **Assembly Qty** (assembly quantity) in the item's standard unit of measure defined for the returned service assembly as defined on the Assemblies Maintenance - Summary page, which is documented earlier in this chapter.

Assembly Search Criteria

Enter the following criteria for the service assembly that you want to view:

SetID	<p>The setID of the service assembly. The system populates this value with the default setID associated with your user ID on the User Preferences - Overall Preference page.</p> <p>For more information about the User Preferences - Overall Preference page, see the Setting General Options chapter.</p>
Item ID	The identification of the end item for which a service assembly has been defined.
Assembly Type	The type of assembly. Although other assembly types are available, for PeopleSoft CRM applications, only the Service assembly type, the default value, is applicable.
Assembly Code	The version of the service assembly defined for the setID and item combination. Assembly codes can range from 1 to 99.
As of Date	The effective date of the service assembly. If you choose not to Show All Components , the system displays only the components defined for the service assembly that are in effect for this date. By default, the system populates this field with the current date.
Show All Components	Select this check box to view all components defined for a service assembly regardless of the effective date.
Depth	The component level of the service assembly that the system will return. To view all levels, enter 99 .
Display	<p>The formatting method that the system will use to display the service assemblies that meet your criteria.</p> <p>Indented: Select this option to display the components of the service assembly with each level indented relative to the previous level. If you select a depth greater than 1, the system automatically sets this value.</p> <p>Non-indented: Select this option to display the components of a service assembly as a simple list without indentation.</p>

Assembly Grid

The grid displays the following information for each returned service assembly:

Lvl (level)	The level of the component on the service assembly.
Component ID	The item ID of each component. Click on the item ID link to access the Assemblies Inquiry - Components page, where you can view the details about the component item, including warranty information. The Assemblies Inquiry - Components page is documented later in this chapter.
Description	The description associated with the component item.

Effective Date	The date on which the component becomes part of the service assembly.
Obsolete Date	The date that the component is removed from the service assembly.
Quantity	The quantity of component required Per <i>Asy</i> (assembly) or Per <i>Ord</i> (order).
UOM (unit of measure)	The standard unit of measure for the component item.
Per	Indicates whether the component Quantity is defined in terms of the <i>ASY</i> (assembly) or the <i>ORD</i> (order).
Serial Control	Indicates whether the component item is serial-controlled.

Assemblies Inquiry - Assembly Page

Usage	Use the Assemblies Inquiry - Assembly Page to view a description of the service assembly and any applicable notes that have been recorded about the service assembly on the Assemblies Maintenance - Assembly page. Note. The Assemblies Maintenance Assembly page is documented earlier in this chapter.
Object Name	EN_BOM_INQ_HEADER
Navigation	Define Products and Items, Define Items, Inquire, Assemblies Inquiry
Access Requirements	Select the Assembly tab.

Summary Assembly Components Component Notes

SetID: CRM01

Item ID: SR1020 17.8 cu. Ft. Chest Freezer Manual Defrost

Assembly Type: Service **Assembly Code:** 1

As of Date: 04/25/2001 ☒ **Show All Components** **Assembly Qty:** 1 EA

Depth: 2

Detail

Description:

Short Desc:

Assemblies Inquiry - Assembly page

At the top of the page, the system displays the selection criteria entered on the Assemblies Inquiry - Summary page.

Detail

The fields in the **Detail** group box capture descriptive information about the service assembly.

Description A long description of the service assembly.

Short Desc (short description) A short description of the service assembly.

The scroll area displays any notes recorded about the service assembly.

Assemblies Inquiry - Components Page

Usage	Use the Assemblies Inquiry - Components page to view details about each component listed on the Assemblies Inquiry - Summary page.
Object Name	EN_BOM_INQUIRY_D
Navigation	Define Products and Items, Define Items, Inquire, Assemblies Inquiry
Access Requirements	Select the Components tab.

Summary	Assembly	Components	Component Notes
SetID: CRM01 Item ID: SR1020 17.8 cu. Ft. Chest Freezer Manual Defrost Assembly Type: Service Assembly Code: 1 As of Date: 04/25/2001 <input checked="" type="checkbox"/> Show All Components Assembly Qty: 1 EA Depth: 2			
Component Find View All First 1 of 5 Last			
Level Code: 1 Item: SR1020 17.8 cu. Ft. Chest Freezer Manual Defrost Component ID: 10000 Refrigerator, Plastic Bins Effective Date: 04/25/2001 Quantity: 2.0000 EA Per: ASY Obsolete Date: 04/25/2003 Op Seq: 0			
Warranty Information First 1 of 1 Last			
Warranty Name: Status:			

Assemblies Inquiry - Components page

At the top of the page, the system displays the selection criteria entered on the Assemblies Inquiry - Summary page.

Component

The **Component** scroll area displays the service assembly components for the selected item.

Level Code The level in the service assembly at which the component item is defined.

Item	The identification of the end item on the service assembly displayed together with its description.
Component ID	The identification of the service assembly component displayed together with its description.
Effective Date	The date on which the component becomes part of the service assembly.
Obsolete Date	The date that the component is removed from the service assembly.
Op Seq (operation sequence)	The sequence in which the component appears in the assembly structure.
Quantity	The quantity of component required Per Asy (assembly) or Per Ord (order) of the end item in the standard unit of measure defined for the component item.
Per	Indicates whether the component Quantity is defined in terms of the ASY (assembly) or the ORD (order).

Warranty Information

The **Warranty Information** grid displays the warranty established for the component item on the Item Definition page, if applicable.

Warranty Name	The name of the warranty defined for the component item.
Status	The status of the warranty: <i>Active</i> or <i>Inactive</i> .

For more information about the Item Definition page, see the Defining Items chapter. **For more information** about warranties, see the Setting Up and Managing Agreements and Warranties chapter.

Assemblies Inquiry - Component Notes Page

Usage	Use the Assemblies Inquiry - Component Notes page to view notes related to a specific component on a service assembly that have been recorded on the Assemblies Maintenance - Component Notes page. Note. The Assemblies Maintenance - Component Notes page is documented earlier in this chapter.
Object Name	EN_BOM_INQ_D_TXT
Navigation	Define Products and Items, Define Items, Inquire, Assemblies Inquiry
Access Requirements	Select the Component Notes page.

Summary		Assembly		Components		Component Notes	
SetID:	CRM01						
Item ID:	SR1020	17.8 cu. Ft. Chest Freezer Manual Defrost					
Assembly Type:	Service	Assembly Code:	1				
As of Date:	04/25/2001	<input checked="" type="checkbox"/> Show All Components	Assembly Qty:	1	EA		
Depth:	2						
Component		Find View All First 1 of 5 Last					
Item:	SR1020	17.8 cu. Ft. Chest Freezer Manual Defrost					
Component ID:	10000	Refrigerator, Plastic Bins					
Effective Date:	04/25/2001	Obsolete Date:	04/25/2003				
Component Note:							

Assemblies Inquiry - Component Notes page

At the top of the page, the system displays the selection criteria entered on the Assemblies Inquiry - Summary page.

Component

The **Component** scroll area displays the following information for each component defined for the service assembly:

Item ID	The identification of the parent item for the component displayed together with the item's description.
Component ID	The identification of the component item displayed together with the item's description.
Effective Date	The date on which the component becomes part of the service assembly.
Obsolete Date	The date that the component is removed from the service assembly.
Component Note	Any notes recorded about the component.

CHAPTER 20

Checking Item Balances and Availability

When ordering replacements or exchanges for material returns in PeopleSoft CRM Support or when ordering material required to complete work on a service order line in PeopleSoft CRM FieldService, you can check real-time balance information for the item you're requesting. With this information, you can set expectations about when material will be received based on whether the required quantity is stocked in one of your inventory business units or must be ordered from an external vendor.

The next sections describe item balance inquiry functionality in PeopleSoft CRM and document the pages associated with item balance checks in the PeopleSoft CRM system.

Understanding Availability Inquiries

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, links to the Item/Product Availability inquiry component in PeopleSoft Inventory are available from the Manage Material component in PeopleSoft FieldService and the RMA Form component in PeopleSoft CRM Support. 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 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 from the RMA Form component for an advanced exchange return material authorization (RMA), click the transfer button next to the item ID in the Replacement Item(s) grid and select the Item Availability link on the transfer page. Similarly, to access the Item/Product Availability inquiry from the Manage Material component, click the transfer button next to the item ID for the material line and select the Item Availability link on the transfer page.

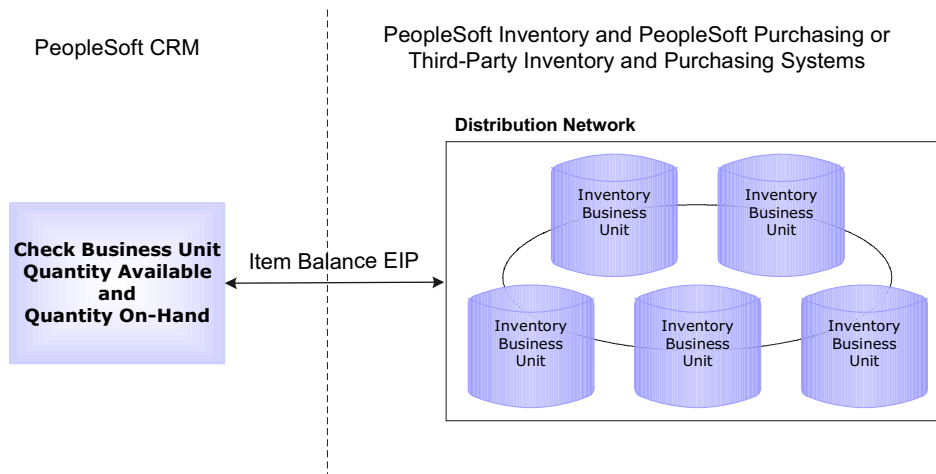
For more information about PeopleSoft's portal technology, see Portal Technology in the *PeopleTools PeopleBook*. **For more information** about the Item/Product Availability inquiry page in PeopleSoft Inventory, see the *PeopleSoft Inventory PeopleBook*. **For more information** about the Manage Material component in PeopleSoft CRM FieldService, see Managing Service Order Material Requirements in the *PeopleSoft CRM FieldService PeopleBook*. **For more information** about the RMA Form component in PeopleSoft CRM Support, see Managing Material Returns in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook*.

Understanding Business Unit Balance Inquiries

To check item balances for a replacement quantity order created with the RMA Form component for an advanced exchange return material authorization (RMA), click the transfer button next to the item ID in the Replacement Item(s) grid and select the Item Balance link on the transfer page. To check item balances for material ordered with the Manage Material component to complete work for a service order line, 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. When you click either of these links, the PeopleSoft CRM system uses the Item Balance EIP to retrieve quantity available and on-hand balance information in real time from the inventory business units that are included in the distribution network defined for customer support or field service operations. The balance information for each business unit in the distribution network is displayed on the Item Balance by Business Unit page in PeopleSoft CRM. The sequence of the business units reflects their order in the distribution network.

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 Applications Fundamentals for FSCM PeopleBook*.

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



The Item Balance EIP returns real-time item balance information for the inventory business units in the distribution network that supports your field service or support operations

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

Understanding Group Member Storage Location Balance Inquiries

In PeopleSoft FieldService you can check item balances for the good truck stock storage locations associated with each technician in a provider group. You can use this balance information to select a technician to assign to a service order line and to decide how much, if any, material needs to be ordered to complete the work on the service order line. 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 in real time 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 system retrieves balance information only for group members who have been associated with storage locations on the Storage Location page of the Worker component. The following sequence of rules govern which group members' storage location balances are retrieved:

1. If there is one or more group members assigned to the service order line, the system retrieves balance information for the group members assigned to the line.
2. If there are no group members assigned to the service order line, but a provider group has been specified on the service order line, the system retrieves the balance information for all group members associated with the provider group on the line.
3. If no group member or provider group has been associated with the line, the system retrieves the balance information for the group member specified on the service order header.

4. If no group member or provider group has been associated with the line and no group member specified on the service order header, the system retrieves the balance information for all group members associated with the provider group specified on the service order header.
5. If the service order includes no group member or provider group information, the system displays a message that the item balance inquiry cannot be preformed without a provider group.
6. If there is no Member or Group assigned both at the line and the Header Level, the system displays a message indicating that the item balance information cannot be retrieved without a provider group or group member.

For more information about defining truck stock storage locations, see Defining Inventory Storage Locations for Technicians in the in the *PeopleSoft CRM FieldService PeopleBook*. **For more information** about the Item Balance EIP, see Using the EIP Catalog in the *PeopleSoft Enterprise Integration PeopleBook*. **For more information** about the Manage Material component and the setup steps required to support the functionality it offers, see Managing Service Order Material Requirements in the *PeopleSoft CRM FieldService PeopleBook*.

Item Balance by Business Units Page

Usage	Use the Item Balance by Business Units page to check item quantity available and on-hand balances in real time for the inventory business units included in the distribution network defined for your customer support or field service operations.
Object Name	RF_STOR_LOC_RST
Navigation	<ul style="list-style-type: none"> • From the RMA Line page in PeopleSoft CRM Support, click the transfer button next to the item ID in the Replacement Item(s) grid and select the Item Balance link on the transfer page. • From the Manage Material page in PeopleSoft CRM FieldService, 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.
Prerequisites	This page is available only if you have implemented the Item Balance EIP to retrieve quantity balance information from PeopleSoft Inventory or your third-party inventory system.

Item Balance by Business Units																													
SetID:	CRM01	Item ID:	10000	Refrigerator, Plastic Bins																									
<div>Find First 1-4 of 4 Last</div> <table> <tr> <th>IN Unit</th><th>Short Description</th><th>Qty Available</th><th>Quantity On Hand</th><th>Qty Owned UOM</th></tr> <tr> <td>US201</td><td>APPL WHS1</td><td>0.0000</td><td>0.0000</td><td>0.0000 EA</td></tr> <tr> <td>US202</td><td>APPL WHS2</td><td>89.0000</td><td>154.0000</td><td>154.0000 EA</td></tr> <tr> <td>US204</td><td>Pleasanton</td><td>10.0000</td><td>10.0000</td><td>10.0000 EA</td></tr> <tr> <td>US205</td><td>SFO</td><td>50.0000</td><td>50.0000</td><td>50.0000 EA</td></tr> </table>					IN Unit	Short Description	Qty Available	Quantity On Hand	Qty Owned UOM	US201	APPL WHS1	0.0000	0.0000	0.0000 EA	US202	APPL WHS2	89.0000	154.0000	154.0000 EA	US204	Pleasanton	10.0000	10.0000	10.0000 EA	US205	SFO	50.0000	50.0000	50.0000 EA
IN Unit	Short Description	Qty Available	Quantity On Hand	Qty Owned UOM																									
US201	APPL WHS1	0.0000	0.0000	0.0000 EA																									
US202	APPL WHS2	89.0000	154.0000	154.0000 EA																									
US204	Pleasanton	10.0000	10.0000	10.0000 EA																									
US205	SFO	50.0000	50.0000	50.0000 EA																									
Manage Material Service Order																													

Item Balance by Business Units page

The system displays the **SetID**, **Item ID**, and description of the item that you are checking balance information for.

The grid lists the balance information published by your inventory system using the Item Balance EIP.

Message Log icon

The yellow triangle indicates that an error encountered by the Item Balance EIP has been recorded in the Message Log. Click the icon to view the message on one of the Item Balance Message pages, which are documented later in this chapter.

IN Unit (inventory business unit)

The identification of the inventory business unit in the distribution network associated with your support or field service activities. The sequence of the business units reflects their order in the distribution network.

Short Description

The short description of the inventory business unit.

Qty Available (quantity available)

The amount of the item that is available to fulfill orders in the inventory business unit in the item's standard unit of measure.

Quantity On Hand

The amount of the item that is currently stored in the inventory business unit in the item's standard unit of measure.

Qty Owned (quantity owned)

The amount of the item that is owned by the inventory business unit in the item's standard unit of measure.

UOM

The standard unit of measure defined for the item.

Depending on where you navigated from, the following links can appear at the bottom of the page: **Return to RMA**, **Service Order**, and **Manage Material**. Click a link to return to the corresponding component.

Item Balance by Group Members Page

Usage	Use the Item Balance by Group Members page to check item balances in real time for members of the assigned provider group.
Object Name	RF_STOR_LOC_RST
Navigation	From the Manage Material page in PeopleSoft CRM FieldService, 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.
Prerequisites	This page is available only if you have implemented the Item Balance EIP to retrieve quantity balance information from PeopleSoft Inventory or your third-party inventory system.

Item Balance by Group Members

SetID: CRM01Item ID: 10000Refrigerator, Plastic Bins

FindFirst1-3 of 3Last

Provider Group Name	Member Name	IN Unit	Short Description	Quantity Available	UOM	Area	Level 1	Level 2	Level 3	Level 4
▼ APLE	Pine,Teresa P	US200	CRM APPL	0.0000	EA	TRK9	GOOD			
APLW	Perry,David L	US200	CRM APPL	5.0000	EA	TRK1	GOOD			
APLW	Orellana,Mason D	US200	CRM APPL	5.0000	EA	TRK2	GOOD			

Manage MaterialService Order

Item Balance by Group Members page

The system displays the **SetID**, **Item ID**, and description of the item that you are checking balance information for.

The grid lists the balance information published by your inventory system using the Item Balance EIP.

Message Log icon

The yellow triangle indicates that an error encountered by the Item Balance EIP has been recorded in the Message Log. Click the icon to view the message on one of the Item Balance Message pages, which are documented later in this chapter.

Provider Group Name

The name of the provider group assigned to the service order line tied to the material line on the Manage Material page.

Member Name

The name of the member of the provider group.

IN Unit (inventory business unit)

The identification of the inventory business unit where your technician's truck stock storage locations are defined.

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

Short Description

The short description of the inventory business unit.

Quantity Available

The amount of the item that is available to fulfill orders in the group member's good truck stock storage location.

UOM	The standard unit of measure defined for the item.
Area	The material storage area in PeopleSoft Inventory or your third-party inventory system that corresponds to the worker's good storage location. You can define a storage location definition in an inventory system using a storage area and up to four levels representing a physical subdivision of the storage area, such as aisles, rows, shelves, and bins.
Level 1	The first level representing a physical subdivision of the storage area.
Level 2	The second level representing a physical subdivision of the storage area.
Level 3	The third level representing a physical subdivision of the area.
Level 4	The fourth level representing a physical subdivision of the area.

Item Balance Message Pages

Usage	The Item Balance Message pages display messages about problems encountered when the PeopleSoft CRM system attempted to retrieve item balance information from your inventory system with the Item Balance EIP.
Object Name	RF_ITM_BAL_MSG1, RF_ITM_BAL_MSG2, RF_ITM_BAL_MSG3
Navigation	Click the Message Log icon displayed on the Item Balance by Business Units page or the Item Balance by Group Members page.
Prerequisites	These pages are available only if there are problems retrieving balance information with the Item Balance EIP.

Item Balance Message 1

Return Message from Inventory

Message Node

BU Return Message: 31

BU Return Text: Nothing returned from the database. (11710,31)

OK **Cancel**

Item Balance Message page

For all three Item Balance Message pages, the **Message Node** group box lists the information regarding errors with the Item Balance EIP process.

Business Unit Errors

If errors occurred for the business unit section of the Item Balance EIP application message, the following fields appear:

BU Return Message	The message catalog number.
BU Return Text	The text of the message catalog entry.

Business unit errors typically indicate that the business unit has not been defined or the business unit-item combination is invalid in your inventory system.

Storage Area Errors

If errors occurred for the storage area section of the Item Balance EIP application message, the following fields appear:

Area Return Message	The message catalog number.
SA Return Text	The text of the message catalog entry.

Storage area errors typically indicate that the storage location for the technician's truck stock has not been defined or the storage location-item combination is invalid in your inventory system.

Business Unit Errors and Storage Area Errors

If the errors occurred for the business unit section and storage area section of the Item Balance EIP application message, all of the fields documented in the previous sections will appear.

Click **OK** or **Cancel** to return to the Item Balance by Business Units page or the Item Balance by Group Members page.

CHAPTER 21

Tracking Installed Products

Installed products records track the products installed at a customer's site or the products issued to an internal worker. In PeopleSoft CRM Support and PeopleSoft CRM Field Service, installed products records can be used to limit agreement lines to a specific set of products and to determine whether a warranty is in effect for an installed product referenced on a case or service order. Installed product records defined in PeopleSoft CRM HelpDesk can be referenced by agents to determine what equipment has been issued to an employee and the location of the equipment.

Understanding Installed Products

Installed product records must be manually entered in your system using the Installed Product component. The installed product records for internal employees must also be manually maintained to reflect any changes in the equipment issued to an employee. However, the installed product records for customers can be automatically updated by the system to reflect the removal or replacement of an item recorded for a service order line with the Manage Material component.

For more information about the Manage Material component, see Managing Service Order Material Requirements in the *PeopleSoft CRM FieldService PeopleBook*.

If a warranty has been defined in your system using the Warranty component and associated with an item using the Item Definition component, you can activate the warranty when an installed product record is created for the item. When a case or service order is created for a customer's installed product, the system checks first for entitlements associated with a valid warranty on the customer's installed product record before searching for entitlements on an agreement.

You can define customer agreements using the Agreement component that reference specific installed product records. These installed products become the products under service on the agreement line. The service and support offerings defined for the agreement line are restricted to the specified installed product records.

For more information about warranties and agreements, see the Setting Up and Managing Agreements and Warranties chapter.

Installed Product Page

Usage	<p>Use the Installed Product page to define an installed product record for each item that has been installed at a customer site.</p> <p>For more information about installed products, see Understanding Installed Products in this chapter.</p>
Object Name	RF_INST_PRODUCT
Navigation	Define Products and Items, Define Products, Use, Installed Product
Access Requirements	<p>Enter a setID and installed product ID. You can enter <i>Next</i> as the installed product ID if automatic numbering for installed product records has been enabled.</p> <p>For more information about automatic numbering, see the Setting General Options chapter.</p>

Installed Product			
SetID:	CRM01	Installed Product ID:	INS0000001
*Status:	Installed		
Product Information			
Product:	SR1004	18000 BTU Room Air (Grey)	
*Item ID:	SR1004	18000 BTU	
Serial Number:	SR1004-1001	Install Type:	Sold
Asset Tag:		Date Ordered:	04/01/2001
*Quantity:	1.0000 EA	Date Shipped:	04/02/2001
		Date Installed:	04/05/2001
Comments:			
Customer Information			
Customer:	MMA Property Management Group		
Site:	Minneapolis		
Name:		Department:	
Location:			
Location Details:			
Purchase Information			
Purchase Order:		Order No:	
Distributor:		Sales Rep:	
Distributor Contact:		Authorization Code:	
Ownership:			
Operating System Information			
Operating System:		Network:	
OS Version:		User Interface:	
Platform:		Environment:	
Warranty Information			
Warranty Name:	EXTENDED-COM	Status:	Active
Start Date:	04/05/2001	End Date:	04/04/2002
Last Modified: 05/23/2001 1:17PM PDT DVP1			

Installed Product page

The system displays the **SetID** and **Installed Product ID** you entered to access the page. The **Status** field indicates the current status of the installed product at the customer's site. Values include *Defective*, *In Repair*, *In-Transit Return*, *Installed*, *Spare*, *Uninstalled*, *Waiting Disposition*, and *Waiting Repair*. Installed products with a status of *Uninstalled* are not displayed on any system prompts.

Product Information

The fields under **Product Information** provide information about the installed product.

Product

The identification of the product installed at the customer site. Products must first be established in your system with the Product EIP or the Product Definition component.

For more information about product definition, see the Setting Up Products chapter.

Item ID	The identification of the item installed at the customer site. If you select a product, the system automatically populates this field with the associated item ID. Items must first be established in your system with the Item Master - CRM EIP or the Item Definition component. For more information about item definition, see the Defining Items chapter.
Serial Number	The serial number on the installed product record. Serial numbers should be entered for items on installed product records that are serial controlled.
Asset Tag	The asset tag for the item on the installed product record, if applicable.
Quantity	The quantity of the item on the installed product record, if applicable, in the item's standard unit of measure. If the item on the installed product record is serial controlled, the quantity must be set to <i>1</i> .
Install Type	The reason the product was installed at the customer site (for informational purposes only). As delivered, the system offers the following options: <i>Beta</i> , <i>Demo</i> , <i>Evaluation</i> , <i>Loan</i> , and <i>Sold</i> .
Date Ordered	The date that the customer ordered the item.
Date Shipped	The date the order was shipped to the customer's site.
Date Installed	The date that the product was installed at the customer's site.
Comments	Notes recorded about the installed product.

Customer Information

The fields under **Customer Information** provide details about the customer and customer site where the installed product is located.

Customer	The name of the customer who owns or leases the installed product. Customers must first be established in your system using the Customer EIP or the Maintain Customer component.
Site	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 the Managing Customer Information chapter.

Name	The name of the contact person at the customer site if a Customer is specified. If a Customer is listed, the prompt for this field lists the contacts associated with the Customer. If no Customer is listed, the field reflects the name of the internal worker to whom the installed product has been issued. Workers must first be established in your system using the Manage Workforce component.
Location	The identification of the internal location where the installed product issued to an internal worker is installed. This value reflects location information defined for the worker on the Manage Workforce component. For more information about the Manage Workforce component, see the Managing Workers chapter.
Department	The department associated with the internal worker to whom the installed product has been issued.
Location Details	Notes about the specific area within the worker's internal location or the customer's site where the installed product is located.

Purchase Information

For informational purposes only, the fields under **Purchase Information** provide information related to the purchasing process associated with the installed product.

Purchase Order	The purchase order number associated with the order for the installed product.
Distributor	The name of the distributor of the installed product.
Distributor Contact	The contact person at the distribution company.
Ownership	An indication of whether the customer owns the installed product or possesses it under the terms of a lease or rental agreement (for informational purposes only). The following options are available: <i>Leased</i> , <i>Purchased</i> , and <i>Rented</i> .
Order No	The order number associated with the customer's request for the installed product.
Sales Rep Name	The name of the sales representative associated with the order for the installed product. If your installation includes PeopleSoft CRM Sales, the system prompt for this field lists the people defined as sales force representatives in your system; however, you can enter the name of any worker.
Authorization Code	The authorization code provided by the credit card company.

Operating System Information

For informational purposes only, the fields under **Operating System Information** capture information relevant to installed product records for computers, computer software, and computer accessories.

Operating System	The operating system of the computer.
OS Version (operating system version)	The version of the operating system.
Platform	The platform of the computer.
Network	The network connection for the computer.
User Interface	The user interface associated with the computer software.
Environment	The database environment of the computer software.

Warranty Information

The **Warranty Information** grid defines the warranty that covers the installed product. Only one warranty can be associated with an installed product record.

For more information about warranties, see the Setting Up and Managing Agreements and Warranties chapter.

Warranty Name	<p>The name of the warranty associated with the item. Warranties must first be established on the Warranty component and associated with the item on the Item Definition component.</p> <p>For more information about the Warranty component, see the Setting Up and Managing Agreements and Warranties chapter. For more information about the Item Definition component, see the Defining Items chapter.</p>
Status	<p>The current status of the warranty, <i>Active</i> or <i>Inactive</i>, for the installed product. For entitlement searches from cases or service orders that reference an installed product, the system checks first for an active warranty that is valid for the current date.</p> <p>For more information about entitlement searches, see the Performing Entitlement Searches for Cases and Service Orders chapter.</p>
Start Date	The date the warranty period begins for the installed product. The system populates this field with the value manually entered as the Date Installed .
End Date	The date the warranty period ends for the installed product.

The **Last Modified** field displays a time stamp showing when the installed product record was updated and the user ID of the person who made the change.

Defining Pricing Information for Services and Support Offerings

The Pricing Information component in PeopleSoft CRM enables you to define pricing records for the services and support offerings provided by your organization. The system uses the pricing structure that you define to calculate prices on agreements. When creating invoices, you can also use the Pricing Information component to look up the price for work not covered by an agreement, such as on-demand service or support call or an additional service activity that is not included for the service on the customer's agreement.

Note. With the pricing records that you define in the Pricing Information component, PeopleSoft CRM can calculate agreement prices. However, as delivered, PeopleSoft CRM does not provide invoicing functions or integration with billing systems.

For more information about how pricing is calculated on agreements, see the Setting Up and Managing Agreements and Warranties chapter.

Understanding Pricing Records

Types of Pricing Records

On the Pricing Information page, you can define pricing records for three types of transactions: agreements, agreement services, and on-demand services. *Agreement* pricing records define the fee that the customer pays for an agreement that covers a specific service or support offering. The agreement price is paid at the time that the agreement is issued to or signed by the customer. *Agreement service* pricing records define what the customer pays when the work associated with the service or support offering on the agreement is performed. *On-demand* pricing records define the amount that a customer pays for services that are not covered by an agreement. Typically, on-demand prices are higher than agreement services prices. By purchasing an agreement, the customer may receive a discount on the normal price of a service or support offering.

Products, Services, and Service Activities on Pricing Records

The prices that you define for agreements, agreement services, and on-demand service pricing records can define rates for a service, a product, or both a service and a product. Pricing records that only specify products are used by call centers to define rates for supporting specific products. Field service organizations define pricing records for a service or for a

combination of a service and a product. When calculating pricing on an agreement, the system checks first for a price for the service-product combination. If none is defined, the system uses the price defined for the service.

For informational purposes, you can also define rates for service activities and combinations of products and service activities. These pricing records enable you to manually adjust a customer's invoice when he or she requests additional service activities that are not included with the service covered by the customer's agreement. For example, at the time that a customer requests a service covered by an agreement, you might want to offer the ability to upgrade the service by adding additional service activities to the basic service covered by the agreement. You can define a fee for each service activity that the customer adds to the basic service. Note that a pricing record can be defined for a service or a service activity, but not both.

Pricing Records for Each Currency

Every pricing record defines a rate in a specific currency. You must define a complete set of pricing records for each currency that is valid for agreement, agreement service, and on-demand service transactions in your business. When you create an agreement, you can reference the pricing records for only one currency.

Purchase Options

Prices can be defined for three types of purchase options: flat, prepaid, and time-and-material. A flat purchase option specifies a set price for a service or support offering on an agreement, an agreement service, or an on-demand service pricing record. A flat rate for an agreement is expressed in a time-based unit of measure, such as hours, days, weeks, months, or years. For an agreement service or an on-demand service, flat rates are expressed in units of work, such as per case or per service order. The flat rate is expressed as an amount to be paid for each installed product covered by that service. For example, if a flat rate is defined as 100 USD per year for a service, and the agreement line that references that service has two installed products, the line price would be calculated as 200 USD for one year.

With the prepaid purchase option, customers pay for a specified quantity of a service or support offering at the time that they purchase the agreement. The prepaid purchase option applies only to agreement pricing records. You define a price for a set quantity of cases or service orders or a price for a certain number of hours worth of work. You may define different prices for the same service or service-product combination for different prepaid quantities; for example, 100 USD per service order when prepaying 20 service orders, and 90 USD per service order when prepaying 50 service orders. The prepaid quantity of cases or service orders is saved on the agreement and the value is decreased when a case or service order is created to account for the consumption. If the case or service order is subsequently canceled, the quantity is added back to the agreement.

The time-and-material purchase option defines a rate for the labor time required to perform the requested work. This rate is always expressed as a time-based unit of measure and applies only to agreement service and on-demand service pricing records. Material is not directly accounted for by the time-and-material purchase option. However, in PeopleSoft CRM you can track material usage for service orders and manually account for the material when creating the customer's invoice.

The following table summarizes the valid data combinations on a pricing record and provides an example for each combination.

<i>Applies To</i>	<i>Purchase Option</i>	<i>Unit</i>	<i>Prepaid Quantity</i>	<i>Example</i>
Agreement	Flat	Time-Based (Hour, Day, Week, Month, Year)	Not Allowed	200 USD per year
Agreement	Prepaid	Case, Service Order, or Hour	Required	30 USD per service order for a prepaid quantity of 15
Agreement Service	Time and Material	Time-Based (Hour, Day, Week, Month, Year)	Not Allowed	40 USD per hour
Agreement Service	Flat	Case or Service Order	Not Allowed	45 USD per service order
On-Demand Service	Flat	Service Order	Not Allowed	55 USD per service order
On-Demand Service	Time and Material	Time-Based (Hour, Day, Week, Month, Year)	Not Allowed	75 USD per hour

Pricing Structures on Agreements

On agreements, you can set up pricing structures that use various combinations of pricing records. For example, your business might offer a five-year preventative maintenance (PM) service agreement for air conditioners. For an agreement price of 500 USD, a service technician will perform PM tasks on a customer's air conditioner for five years. For customers who buy this agreement, you also offer repair services for 75 USD per service call—a 50 percent discount off your on-demand rate. To support this agreement scenario, you define an agreement pricing record with a flat purchase option for PM service of 100 USD per year. You also define an agreement service pricing record for your air conditioner repair service for a flat rate of 75 USD per service order. Your on-demand pricing record for the same service would be 150 USD. After defining your pricing records, you create an agreement with a five-year duration that references the agreement and the agreement service pricing records. The customer who buys the agreement pays 500 USD and receives PM service for five years. Should the customer's air conditioner require repair services, the customer pays 75 USD per repair service order for the duration of the five-year agreement.

Note. Prepaid quantity is a fixed amount per contract, not per year. In this case, if someone were to prepay for 10 PM visits (regardless of agreement duration), one would define a prepaid price of 50 USD per service order for a quantity of 10 service orders. An alternate arrangement would be to define a flat rate of 100 USD per year for PM service—for a five-year agreement, this would cost 500 USD.

Pricing Information Page

Usage	<p>Use the Pricing Information page to establish pricing records for the services and support offerings provided by your organization. The system uses the pricing records defined here to calculate pricing on agreements. For reference purposes, you can also record pricing information on this page for service and support activities that are not covered by agreements.</p> <p>For more information about pricing record definition, see Understanding Pricing Records in this chapter.</p> <p>Note. To establish pricing for the products that you sell, use the Product Price page in the Product menu. For more information about the Product Price page, see the Setting Up Products chapter. Also, material costs for items are stored in your inventory system. For more information about defining material costs in PeopleSoft Inventory, see the <i>PeopleSoft Inventory PeopleBook</i>.</p>
Object Name	RF_SVC_PRICE4
Navigation	Administer Agreements, Manage Agreements, Use, Pricing
Access Requirements	Enter a setID.

Pricing Information

▼ Search Filter

Enter or select the criteria you want to appear in the list of Prices and press Search.

SetID: CRM01 Applies To: Currency Code: USD

Service: Purchase Option: Activity: Product ID:

View and update Prices in the list below.

*Applies To	*Purchase Option	Service	Product ID	Description	Activity	*Currency Code	*Rate Amount	*Unit	Prepaid Quantity
1 On Demand Service	Flat				Rep. Compressor	USD	50.00	S.O.	
2 On Demand Service	Flat				Rep. Compressor	USD	40.00	S.O.	
3 Agreement	Prepaid		SR1015	24 in. Dishwasher 5 Cycles (St		USD	100.00	Case	100
4 Agreement	Prepaid		SR1015	24 in. Dishwasher 5 Cycles (St		USD	90.00	Case	1000
5 Agreement	Flat	PM for A/C				USD	10.00	Month	
6 Agreement	Flat	PM on Dish Was				USD	40.00	Year	
7 Agreement	Flat	Refrigerator PM				USD	40.00	Year	
8 Agreement	Flat	Freezer PM				USD	40.00	Year	
9 Agreement	Flat	PM - Food Disp.				USD	25.00	Year	
10 Agreement Service	Flat	Repair A/C	SR1003	12000 BTU Room Air (Light Belg		USD	60.00	S.O.	

Pricing Information page

Search Filter

The **Search Filter** group box provides a method of viewing a subset of the pricing information that meets a specific set of criteria. Enter your criteria and click the **Search** button to populate the grid. Click the **Clear** button to clear the fields so that you can enter another criteria set. If you click the **Search** button without specifying any criteria, the system returns all pricing records defined for the setID.

SetID	The setID that you entered to access the page. The system returns pricing records for a specific setID.
Service	The identification of a service. Select a value to limit the search to pricing records defined for a specific service. Services must first be defined using the Services component. Click the transfer button to access the Services component. Services are not relevant to pricing for support agreements.
Activity	<p>The identification of the service activity. Select a value to limit the search to pricing information defined for a specific service activity. Activities must first be defined using the Service Activity Code page. Click the transfer button to access the Service Activity Code page.</p> <p>Note. Your search criteria can include a Service or an Activity, but not both. These fields are mutually exclusive on the pricing record.</p> <p>For more information about defining services and service activities, see Setting Up Your Services in <i>PeopleSoft CRM FieldService PeopleBook</i>.</p>
Applies To	The type of transaction that the pricing record applies to: Agreement , Agreement Service , or On Demand Service . Select a value to limit the search to a specific type of pricing record. For support agreements, the Agreement option is the only applicable value.
Currency Code	<p>The currency of the rate amount. Select a value to limit the search to pricing records for a specific currency. Currencies must first be established on the Currency Code page.</p> <p>For more information about currency definition, see the Maintaining Currencies and Market Rates chapter.</p>
Purchase Option	The method of purchasing the service or support offering: Flat , Prepaid , or T&M (time and material). Select a value to limit the search to pricing records for a specific purchase option.
Product ID	<p>The identification of the product. Select a value to limit the search to pricing records for specific product. Products must first be established in your system using the Product EIP or the Product Definition component.</p> <p>For more information about the product definition, see the Setting Up Products chapter.</p>
Pricing Information	
The grid lists the pricing information records that meet your search criteria.	

Applies To

Indicates the transaction that the pricing record applies to. The following options are available:

Agreement: Represents the fee that a customer pays for an agreement that covers a specific service or support offering. **For more information** about agreements, see the Setting Up and Managing Agreements and Warranties chapter.

Agreement Service: Represents the fee that a customer pays when work covered by an agreement is performed. Typically, this price is lower than what the customer would pay for the service on demand—that is, without an agreement.

On Demand Service: Represents the fee that a customer pays for a service that is not covered by an agreement.

Purchase Option

The method of purchasing the service or support offering for an **Agreement**, **Agreement Service**, or **On-Demand Service** transaction. The following options are available:

Flat: Indicates that the service or support offering is purchased for a flat fee.

Prepaid: Indicates that a specified number of work units of the service or support offering is purchased in advance. This purchase option applies only to pricing records for **Agreement** transactions.

T&M (time and material): Indicates that the price of the service or support offering is based on the labor rate. This purchase option applies only to pricing records for **Agreement Service** and **On Demand Service** transactions.

Service

The identification of the service that the pricing applies to, if applicable. Services must first be defined using the Services component. Click the transfer button to access the Services component. Services are not relevant to pricing for support agreements.

For more information about service definition, see Setting Up Your Services in *PeopleSoft CRM FieldService PeopleBook*.

Product ID

The identification of the product that the pricing record applies to, if applicable. Products must first be defined using the Products component. Click the transfer button to access the Products component.

For more information about product definition, see the Setting Up Products chapter.

	<p>If you specify both a product and a service on a pricing record, the price applies only to service-product combinations. Pricing records that specify products only are used by call centers to define rates for supporting specific products.</p>
Description	<p>The description associated with the product ID, if applicable.</p>
Activity	<p>The identification of the service activity that the purchase option applies to. Activities must be defined using the Service Activity Code page. You can define pricing records for service activities or combinations of service activities and products. A pricing record can be defined for a service or an activity, but not both.</p> <p>Pricing records for service activities are informational only. You can use service activity price information to manually adjust a customer's invoice when activities have been added to a service covered by an agreement.</p> <p>For more information about service activity definition, see Setting Up Your Services in <i>PeopleSoft CRM FieldService PeopleBook</i>.</p>
Currency Code	<p>The currency of the rate amount. You must define a complete set of pricing records for your services and support offerings for each currency that is valid for <i>Agreement</i>, <i>Agreement Service</i>, and <i>On Demand Service</i> transactions in your business.</p>
Rate Amount	<p>The amount charged per the specified unit in the specified currency.</p>
Unit	<p>The unit of work associated with the Rate Amount. Depending on your Applies To and Purchase Option selections, you can specify a rate for the following work units: <i>Day</i>, <i>Hour</i>, <i>Month</i>, <i>S.O.</i> (service order), <i>Case</i>, <i>Week</i>, or <i>Year</i>.</p> <p>For more information about which service units are valid for specific data combinations on the pricing record, see Understanding Pricing Records in this chapter.</p>
Prepaid Quantity	<p>The number of work units of a service or support offering that a customer pays for in advance. This value applies only to the <i>Prepaid</i> purchase option.</p>

Setting Up and Managing Agreements and Warranties

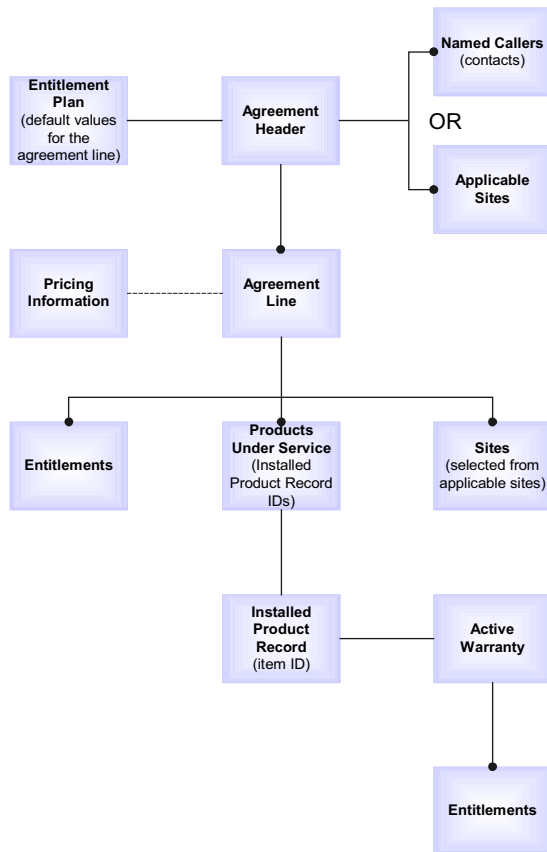
In PeopleSoft CRM, *agreements* reflect service or support contracts issued to your customers. *Warranties* define the coverage you offer for a particular item when an active warranty is in effect for an item installed at a customer's site. Both warranties and agreements define the services or support the customer is entitled to and the duration of the contract. Agreements also define the price of services or support offerings covered by the agreement, and the price of the agreement itself.

Understanding Agreements and Warranties

With the Agreement component in PeopleSoft CRM, you can define two types of agreements: a support agreement or a field service agreement. Field service agreements define the customer sites that are entitled to the services on the agreement line. Each site on the agreement is assigned a site identification number (SIN) that can be used to identify whether a service can be performed at a particular location. Each agreement line specifies the sites covered by the service defined on the agreement line. Service agreements do not reference services on agreement lines. Like field service agreements, support agreements can define customer sites that are entitled to support offerings. Support agreements can also define which people can call your agents for support. Each named caller listed on an agreement is assigned a personal identification number (PIN) that can be used to identify the person as a valid caller when he or she calls for support. A support agreement can be defined for sites or for named callers, but you cannot define an agreement that includes lines for both sites and named callers.

Using the Warranty component, you define the duration of the warranty and the entitlements owed to customers with products covered by the warranty. After a warranty is defined, it can be associated with items in your system on the Item Definition page. For specific items installed at a customer's site, you can activate the warranty on the customer's installed product record using the Installed Product component.

The next diagram illustrates the data model for agreements and shows the relationship between agreements and warranties:



Agreement Data Model

At the header level of an agreement, you define customer name and address information, the named callers for support agreements or the applicable sites for call center or field service agreements. You can also define default entitlements for the agreement lines on the agreement header.

The line level of the agreement lists a service or support offering together with the entitlements that the customer is owed when the service or support offering is requested. A support agreement line does not reference a service; however, it may define support offerings for a specific product on the agreement line. For support agreements, the agreement line sites define the customer sites from which people may call for support. For field service agreements, the agreement line also lists the sites covered by the agreement line. The sites define where the service specified on the agreement line can be performed.

For both support agreements and field service agreements, the agreement line can reference the installed products at the customer's site that are covered by the service or support offering on the agreement line. If a warranty has been defined for an item on the customer's installed product record, the warranty for the item can be activated when the customer's installed product record is created. When searching for a customer's entitlements for a case or a service order that references an installed product, the system checks first for a valid warranty on the installed product record. The system also searches for entitlements on the customer's agreement; any agreement entitlements that are found will be listed after the warranty entitlements.

For more information about entitlement searches, see the Performing Entitlement Searches for Cases and Service Orders chapter.

Understanding Agreement Pricing

The pages of the Agreement component provide buttons you can click to have the system retrieve pricing records, calculate the price of an agreement line, and calculate the price of the entire agreement.

Note. PeopleSoft CRM enables you to calculate agreement prices. However, as delivered, PeopleSoft CRM does not provide invoicing functions or integration with billing systems. In PeopleSoft CRM Support, agents can take payment by credit card at the time of the transaction regardless of whether an agreement is associated with the case.

Retrieving Pricing Records

On the Agreement Line page of the Agreement component, the system can retrieve two types of pricing records for the agreement line: agreement pricing records and agreement service pricing records. *Agreement* pricing records define the fee that the customer pays for an agreement that covers a specific service or support offering. The agreement price is paid at the time the agreement is issued to or signed by the customer. *Agreement service* pricing records define what the customer pays when the work associated with the service or support offering on the agreement is performed—that is, the price paid per transaction covered by the agreement line. The system only retrieves pricing records defined for the currency specified for the agreement header on the Agreement page. After pricing values have been defined for any of the agreement lines, you cannot change the currency at the agreement header level unless you clear the pricing values that have been defined for the lines.

For field service agreements, you define pricing records for a service or a service and product combination on the Pricing Information page. When you create a line for a field service agreement on the Agreement Line page, you can retrieve the price from the appropriate pricing record by entering the applicable service, product, and purchase option information. When you specify a prepaid purchase option, you must specify the prepaid quantity. The rate on the agreement pricing record that matches the criteria you enter becomes the base line price for the agreement line. The rate for the agreement service pricing record that matches your criteria becomes the transaction price for work covered by the agreement line.

For support agreements, the functionality is similar. You can create agreement and agreement service pricing records on the Pricing Information page that define support rates for specific products. When you create a support agreement, you can retrieve a base line price from the appropriate pricing records on an agreement line by entering the applicable product, and purchase option information on the Agreement Line page. However, if no pricing records are defined or if no product or purchase option criteria are entered, you can manually enter a prepaid rate and base line price for support agreement lines.

For more information about defining pricing records for field service and support agreements, see the Defining Pricing Information for Services and Support Offerings chapter.

Calculating the Final Line Price

To calculate the final line price on an agreement line that uses a flat purchase option, the system: 1) calculates the entitlement adjustment for the line and applies it to the base line price, 2) determines the base line price per month assuming a 30-day month, 3) calculates the duration of the agreement in months, and 4) determines the number of installed products covered by the agreement line. Once these variables are determined, the system calculates the final line price as follows:

$$\text{Final Line Price (for flat rates)} = \text{Entitlement Adjusted Base Line Price per Month} \times \text{Agreement Duration (in Months)} \times \text{Installed Product Quantity}.$$

To calculate the final line price on an agreement line that uses a prepaid purchase option, the system calculates the entitlement adjustment for the line and applies it to the base line price. The prepaid rate is a fixed amount that does not vary with the duration of the agreement, so there is no need to adjust the base line price to account for agreement duration. The final line price is calculated as follows:

$$\text{Final Line Price (for prepaid rates)} = \text{Prepaid Rate} \times \text{Prepaid Quantity} \times \text{Entitlement Adjustment}$$

The next sections detail how the system calculates each of the variables for the final line price equations.

Entitlement Adjustment

The system adjusts the base line price or prepaid rate retrieved from the pricing record to account for uplifts and discounts associated with the entitlements on the agreement line. The uplift and discount percentage values are summed and applied to the base line price as follows:

$$\text{Entitlement Adjusted Base Line Price} = \text{Base Line Price} \times (1 + (\text{sum of entitlement discount and uplifts percentage values}))$$

For example, suppose the system returns a base line price of 100 USD for an agreement line with three entitlements. The first entitlement has an uplift of 10%, the second an uplift of 15%, and the third a discount of 5%. The entitlement-adjusted base line price is calculated as follows:

$$\begin{aligned} \text{Entitlement Adjusted Base Line Price} &= 100 \text{ USD} \times (1 + (0.1 + 0.15 - 0.05)) = \\ &100 \text{ USD} \times 1.2 = 120 \text{ USD} \end{aligned}$$

Base Price per Month

Because prices on pricing records with flat rate purchase options can be expressed in many different time-based units of measure, such as hours, days, weeks, months, and years, the system converts the entitlement-adjusted agreement line prices to the price per month. This

common unit of measure enables the system to sum the agreement lines to calculate the base price of the entire agreement.

When calculating the price per month, the system assumes a 30-day month. For example, to convert an entitlement-adjusted agreement line price of 10 USD per week to a monthly rate, the system uses a conversion factor of 4.285: 30 days per month divided by 7 days per week.

$$10 \text{ USD per week} \times 4.285 = 42.85 \text{ USD per month}$$

Agreement Duration

The system must also determine the duration of the agreement in terms of months. To calculate this value, the system determines the number of days between the start and end dates on the agreement based on a 360-day year, and divides the result by 30. This calculation assumes that there are 12 30-day months per year.

Installed Product Quantity

When the agreement purchase option is *Flat*, the entitlement-adjusted price on the agreement line is per each installed product covered by the agreement line. The applicable installed product records are listed in the Products Under Service grid on the Agreement Line page. To determine the installed product quantity, the system adds the values in the quantity field of each referenced installed product.

Recalculating the Agreement Line Price

If the entitlements are changed on an agreement line, if the installed product quantity changes for an agreement line, or if the start and end dates are changed on the agreement header after agreement line pricing has been calculated, the agreement price will not reflect these changes. In the Calculate Final Line Price group box and the New Calculation Values group box on the Agreement Line Page, the system displays the values used to calculate the final agreement line price and the current sum of the entitlement uplift and discount values and the current agreement duration. If the current values do not match the values used for the final line price calculation, the price of the agreement is no longer accurate. Depending on your business rules, you can recalculate the current final price for the agreement lines as necessary and recalculate the total agreement price at the header.

Calculate Final Line Price		New Calculation Values	
Calculate Final Price			
Entitlement Adjustment:	15.00 %	Entitlement Uplift/Discount:	40 %
Base Price/Month:	11.50 USD		
Agreement Duration:	12.00 months	Agreement Duration:	12.00 months
Installed Product Quantity:	4		
Final Line Price:	552.00 USD		

The New Calculation Values group box indicates when changes have been made to the variables used to calculate the Final Line Price

Calculating the Agreement Price

On the Agreement page of the Agreement component, you can click the Calculate Price button to determine the base price of the entire agreement and the total price of the agreement. The base price is calculated by adding the final line prices on the associated agreement lines. The total price is calculated by applying the uplift or discount percentage that you manually enter on the Agreement page to the base price of the agreement. For example, if the system calculates a base price of 2000 USD for the agreement and you have entered a discount of 10 percent, the system calculates a total price of 1800 USD for the agreement. Note that discounts are entered with a minus sign preceding the amount, whereas uplifts are entered without a sign.

Defining Service Levels

With the Service Level component, you define the hours of operation or prime period of maintenance for the services your organization offers. For example, you may provide some services only during a 40-hour workweek, while other services may be provided 24-hours a day.

You can define entitlements for specific service levels on the Entitlements component, which can then be included on a customer's agreement. When a case or service order is covered by an agreement line with a service level entitlement, agents can use the service level information to determine required start dates and times for the work.

For more information about the Entitlements component, see Defining Entitlements in this chapter.

Note. We recommend that you define service levels for each time zone covered by your organization. A single time zone may be appropriate for some organizations.

Service Level Page

Usage	Use the Service Level page to define the authorized hours of operations or prime period of maintenance—8:00 a.m. to 5:00 p.m. weekdays, 24 hours 7 days per week, and so forth—for the service level entitlements you will offer on agreements and warranties. The service levels you define are informational only. For cases or service orders covered by an agreement line or warranty with a service level entitlement, agents can use the service level information to manually determine the appropriate required start dates and times for work in a case or service order.
Object Name	RF_SERVICE_LEVEL
Navigation	Define Business Rules, Maintain Entitlements, Use, Service Level
Access Requirements	Enter a setID and service level.

Service Level

SetID: CRM01

*Service Level: 7X24

*Description: Premium Service level

*Short Description: Premium

*Time Zone: PST

Multi-Day			
<input checked="" type="checkbox"/> Weekdays	Begin Time:	12:00AM PDT	End Time: 11:59PM PDT
<input checked="" type="checkbox"/> Weekend	Begin Time:	12:00AM PDT	End Time: 12:00AM PDT

Single Day			
<input checked="" type="checkbox"/> Monday	Begin Time:	12:00AM PDT	End Time: 11:59PM PDT
<input checked="" type="checkbox"/> Tuesday	Begin Time:	12:00AM PDT	End Time: 11:59PM PDT
<input checked="" type="checkbox"/> Wednesday	Begin Time:	12:00AM PDT	End Time: 11:59PM PDT
<input checked="" type="checkbox"/> Thursday	Begin Time:	12:00AM PDT	End Time: 11:59PM PDT
<input checked="" type="checkbox"/> Friday	Begin Time:	12:00AM PDT	End Time: 11:59PM PDT
<input checked="" type="checkbox"/> Saturday	Begin Time:	12:00AM PDT	End Time: 12:00AM PDT
<input checked="" type="checkbox"/> Sunday	Begin Time:	12:00AM PDT	End Time: 12:00AM PDT

Comments: This service level is provided only for premium customers

Last Modified:

Service Level page

The system displays the **SetID** and **Service Level** you entered to access the page. When you define a new service level, you can enter descriptive information.

Description

The long description associated with the service level. When defining a new service level, you can enter a long description using up to 30 alphanumeric characters.

Important! Entitlement descriptions are displayed at the time of entitlement definition. Enter descriptions that will be meaningful to the person defining service level entitlements.

Short Description

The short description associated with the service level. When defining a new service level, you can enter a short description using up to 10 alphanumeric characters.

Time Zone

The time zone associated with the service level. In Add mode, you must select the appropriate time zone for the authorized hours of operations that you define for the service level. The time zone code you select displays next to the time values you enter in the **Multi-Day** and **Single Day** group boxes. After the service level record is saved, the time zone for the service level cannot be changed.

Multi-Day and Single Day Hours of Operation

The **Multi-Day** group box provides a defaulting mechanism to quickly populate the **Single Day** group box. Define **Begin Time** and **End Time** values for hours of operations during the

Weekdays and the **Weekend**. These values are used to populate the fields in the **Single Day** group box. You can edit the hours of operation for individual days as necessary.

Use the **Comments** field to enter notes about the service level.

The **Last Modified** field displays a time stamp showing when the service level was updated and the user ID of the person who made the change.

Defining Entitlements

With the Entitlement component, you define an entitlement record for every response time, restore time, coverage type, or service level that your company specifies on customer agreements or warranties. Using the Agreement component, you select the entitlement records that describe what the customer is contractually owed for the service or support offering on each line of the customer's agreement. Similarly, when defining warranties with the Warranty component, you select the entitlements contractually owed to customers who have an installed product that is covered by a valid warranty. To speed data entry on agreements and warranties, you can define sets of entitlements using the Entitlement Plan Setup component.

For more information about the Agreement component, see Defining Agreements in this chapter. **For more information** about the Warranty component, see Defining Warranties in this chapter.

Each entitlement record can specify an uplift or discount that can be used to adjust the base price of agreement lines that include the entitlement. When the system calculates the final line price of the agreement line, it adjusts the base line price to reflect the sum of the uplift and discount values associated with the entitlements on the line.

For more information about agreement pricing calculations, see Understanding Agreement Pricing in this chapter.

Entitlements Page

Usage	Use the Entitlements page to establish the entitlements that can be offered on agreements and warranties.
Object Name	RF_ENTITLEMENTS
Navigation	Define Business Rules, Maintain Entitlements, Use, Entitlements
Access Requirements	Enter a setID and entitlement name.

Entitlements

Entitlement Code: PREMIUM-02 SetID: CRM01

Description: Premium Material Coverage Uplift/Discount: 50 %

Workflow Schedule: [Search Icon]

Entitlement Type

☐ Guaranteed Response

☐ Guaranteed Restore

☐ Service Level

☒ Guaranteed Coverage

Coverage Type: Material

Percent Covered: 75

Length: 1

Unit: Year

Last Modified: 04/03/2001 3:08PM PDT NAPA

Entitlements page

The system displays the **Entitlement Code** and **SetID** you entered to access the page.

Description

A description of the entitlement. When you define a new entitlement, you can enter a description using up to 30 alphanumeric characters.

Important! Entitlement descriptions are displayed at the time of service order and case entry. Enter descriptions that will be meaningful to the person entering the service order or case. Typically, the entitlement description describes the response time, restore time, coverage, or service level contractually owed to the customer per the specified agreement line or warranty. For example, you may want to include the time zone of a service level in its description.

Uplift/Discount

The percentage of uplift or discount to add to the price of agreement lines which include this entitlement. Discounts are entered with a minus sign preceding the amount; uplifts are entered without a sign.

Workflow Schedule

The workflow action associated with the entitlement, if applicable. This workflow action is used by PeopleSoft CRM Support event processing to schedule and address notifications related to guaranteed response and restore times.

For more information about configuring agreement-related event processing for support cases, see Setting Up Component Event Processing in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook*.

Entitlement Type

The **Entitlement Type** group box specifies the category of entitlement defined by the entitlement code together with the entitlement details associated with the selected category.

Guaranteed Response Indicates that the customer is entitled to a response within the specified number of **Minutes**. Agents can use this information to manually determine the required start date for the service order.

Guaranteed Restore Indicates that the customer is entitled to restored functionality of the product within the specified number of **Minutes**. Agents can use this information to manually determine the required end date for the service order.

Service Level Indicates that the customer is entitled to a specific **Service Level**, or prime period of maintenance. Service levels must first be established on the Service Level page.

For more information about the Service Level page, see Defining Service Levels in this chapter.

Guaranteed Coverage Indicates that the customer is entitled to a percentage of a specific type of coverage for a specific amount of time. When defining an entitlement for guaranteed coverage, select a **Coverage Type**, define the **Percent Covered**, and specify a time frame by entering a numeric value in the **Length** field and defining an appropriate **Unit**—*Day, Week, Month, or Year*.

The following **Coverage Type** options are available:

Expense: Indicates that the **Percent Covered** portion of any expenses associated with completing the customer's service order will not be charged to the customer during the time period defined by the **Length** and **Unit** fields.

Material: Indicates that the **Percent Covered** portion of the cost of any materials required to complete the customer's service order will not be charged to the customer during the time period defined by the **Length** and **Unit** fields.

Time: Indicates that the **Percent Covered** portion of the cost of any labor required to complete the customer's service order or case will not be charged to the customer during the time period defined by the **Length** and **Unit** fields.

Note. As the system is delivered, *Expense, Material, and Time* coverage types are informational only. The system does not generate invoices or price calculations based on these options.

The **Last Modified** field displays a time stamp showing when the entitlement record was updated and the user ID of the person who made the change.

Setting Up Entitlement Plans

Use the Entitlement Plan Setup component to define entitlement sets that can be used for defaulting purposes on agreements or warranties. On the Agreement component or the Warranty component, you can reference a relevant entitlement plan to quickly populate the agreement or warranty with the entitlements associated with the plan. You can then delete or add other entitlements to the agreement or warranty as necessary.

For more information about the Agreement component, see Defining Agreements in this chapter. **For more information** about the Warranty component, see Defining Warranties in this chapter.

Entitlement Plan Setup Page

Usage	Use the Entitlement Plan Setup page to define groups of entitlements that can be used to quickly populate the entitlements on an agreement or warranty.
Object Name	RF_ENTITLE_PLAN
Navigation	Define Business Rules, Maintain Entitlements, Use, Entitlement Plan
Prerequisites	Individual entitlements must first be defined on the Entitlements page before you associate them with an entitlement plan. For more information about the Entitlements page, see Defining Entitlements in this chapter.
Access Requirements	Enter a setID and entitlement plan name.

Entitlement Plan Setup

Entitlement Plan Name: GOLD SetID: CRM01

Description: Extended Plan

Description	Entitlement Minutes	Service Level	Coverage Type	Percent Covered	Coverage Length	Unit	Uplift / Discount
1 Five hour guaranteed respor	300	7X24					20
2 Eight hour guaranteed restor	480						20
3 Extended Service Level		EXT					15
4 Extended Expense Coverage			EXP	50	1 YR		25
5 Extended Material Coverage			MAT	50	1 YR		25
6 Extended Time Coverage			TIME	50	1 YR		25

Last Modified: 04/03/2001 3:26PM PDT NAPA

Entitlement Plan Setup page

The system displays the **Entitlement Plan Name** and the **SetID** you entered to access the page. For existing plans, the system displays the **Description**. When you define a new plan, you can enter a description using up to 30 alphanumeric characters.

Entitlement Plan

The grid lists the entitlements included in the entitlement plan.

Description

The description of the selected entitlement. Entitlements must first be defined on the Entitlements page.

Entitlement Minutes

The amount of time within which the customer is entitled to a response or restoration of product service, depending on the entitlement type.

Service Level

The authorized hours of operation, or prime period of maintenance, offered by a service level entitlement. The call center agent can use the service level to manually calculate response and restore deadlines on service orders for customers who have guaranteed response and restore entitlements.

Coverage Type

The type of coverage offered by a guaranteed coverage entitlement. Guaranteed coverage entitlements define a specific type of coverage for a specific amount of time. A guaranteed coverage entitlement can offer one of the following coverage types:

EXP (expense): Indicates that the **Percent Covered** portion of any expenses associated with completing the customer's service order will not be charged to the customer during the time period defined by the **Coverage Length** and **Unit** fields.

MAT (material): Indicates that the **Percent Covered** portion of the cost of any materials required to complete the customer's service order will not be charged to the customer during the time period defined by the **Coverage Length** and **Unit** fields.

TIME: Indicates that the **Percent Covered** portion of the cost of any labor required to complete the customer's service order or case will not be charged to the customer during the time period defined by the **Coverage Length** and **Unit** fields.

Uplift/Discount

The uplift or discount percentage to add to the base price of the service agreement line that includes this entitlement. The system applies the uplifts or discounts to the base price when you click the Calculate Final Price button on the Agreement Line page of Agreement component. The Agreement Line page is documented later in this chapter.

The **Last Modified** field displays a time stamp showing when the entitlement plan was updated and the user ID of the person who made the change.



Defining Agreement Templates

Use the Agreement Template component to define model agreements for specific types of customers. When you define an agreement for a specific customer using the Agreement component, you can reference an agreement template to populate the basic agreement information and then make modifications as necessary.

For more information about the Agreement component, see Defining Agreements in this chapter.

Agreement Template Page

Usage	Use the Agreement Template page to define the header and line information for a model agreement.
Object Name	RF_AGREETEMP_HDR
Navigation	Administer Agreements, Manage Agreements, Use, Agreement Template
Access Requirements	Enter a setID and agreement template.

Agreement Template			Entitlement Defaults			Template Line		
Template ID:	STANDARD		Agreement Code:	STANDARD		SetID:	CRM01	
Status, Scope and Contact Info								
*Status:	<input type="text" value="Available"/>							
*Scope:	<input type="text" value="Site"/>		Max. Contacts:		<input type="text"/>			
Coverage								
Provider Group Name:	<input type="text" value="Appliances Western"/>							
Group Member Name:	<input type="text"/>							
Billing Information								
Billing Frequency:	<input type="text"/>		Payment Terms:	<input type="text"/>				
Payment Method:	<input type="text"/>							
Last Modified:	05/08/2001 6:41PM PDT DVP1							

Agreement Template page

For existing templates, the system displays the **Template ID**, **Agreement Code**, and **SetID** that you entered to access the page.

Status, Scope, and Contact Information

The fields under **Status, Scope and Contact Info** (information) reflect the status, scope, and maximum contacts permitted by the model agreement.

Status

The status of the agreement: **Available**, **Obsolete**, or **Processing**. No system processes change the status value of the agreement, but you can manually change the status as necessary. Only templates with a status of **Available** can be used to create a new agreement.

For more information about entitlement searches, see the Performing Entitlement Searches for Cases and Service Orders chapter.

Scope

The scope of the agreement:

Site: Indicates that the agreement applies to sites specified on the Scope Details page.

Contact: Indicates that the agreement applies to named callers specified on the Scope Details page.

Max. Contacts

For an agreement with a **Scope** of **Contact**, the maximum number of named callers that can be specified for the agreement on the Scope Details page.

The Scope Details page is documented later in this chapter.

Coverage

The fields under **Coverage** define the default service order assignment values for service orders created under the terms of this agreement. These default values can be changed, if desired, on the service order page.

Provider Group Name	The name of the provider group that will perform the service request covered by this agreement.
Group Member Name	The name of the provider group member that will perform the service request covered by this agreement.

Billing Information

The fields under **Billing Information** relate to how the customer will pay for the agreement.

Billing Frequency	The period of the billing cycle. You may choose to bill your customer <i>Annually</i> , <i>Bi-weekly</i> , <i>Monthly</i> , or <i>Quarterly</i> .
Payment Method	Indicates the customer's method of payment: <i>Check</i> , <i>Credit Crd</i> (credit card), or <i>PO</i> (purchase order).
Payment Terms	Indicates when payment is due: <i>Free</i> : No payment due. <i>Net 30</i> : Payment due within 30 days of the Billing Start Date . <i>Net 90</i> : Payment due within 90 days of the Billing Start Date . <i>Pay Full</i> : Payment due immediately.



The **Last Modified** field displays a time stamp showing when the agreement header was updated and the user ID of the person who made the change.



























Entitlement Defaults Page

Usage	Use the Entitlement Defaults page to identify a set of entitlements to use as default values for the entries added on the Template Line page of the Agreement Template component.
Object Name	RF_AGREETEMP_ENTL
Navigation	Administer Agreements, Manage Agreements, Use, Agreement Template
Prerequisites	Entitlements must first be defined on the Entitlements page. For more information about entitlement definition, see Defining Entitlements in this chapter.
Access Requirements	Select the Entitlement Defaults tab.

Agreement Template Entitlement Defaults Template Line

Agreement Template ID: STANDARD SetID: CRM01

Entitlement Plan Name: PREMIUM  

First  1-6 of 6  Last							
Description	Entitlement Minutes	Service Level	Coverage Type	Coverage Percent Covered	Coverage Length	Unit	Uplift / Discount
1 One hour guaranteed res  	60						50  
2 Four hour guaranteed res  	240						50  
3 Premium Service Level  		EXT					50  
4 Premium Expense Cover  			EXP	75	1 YR		50  
5 Premium Material Covera  			MAT	75	1 YR		50  
6 Premium Time Coverage  			TIME	75	1 YR		50  

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Entitlement Defaults page

The system displays the **Agreement Template ID** and **SetID** defined on the Agreement Template page.

Entitlement Defaults

The grid lists the default entitlements for the model agreement. The set of entitlements defined in the grid becomes the default entitlement set for each new line added on the Template Line page of the Agreement Template component. These entitlements also become the default entitlements for any agreements created from this template ID.

When you define a new agreement template, you can select an **Entitlement Plan Name** to initially populate the grid with a pre-defined set of entitlements. You can add or delete entitlements from this set as necessary. Entitlement plans must first be established on the Entitlement Plan Setup page.

For more information about the Entitlement Plan Setup page, see Setting Up Entitlement Plans in this chapter.

The following columns appear in the entitlement defaults grid:

Description	The description of the selected entitlement. Entitlements must first be defined on the Entitlements page.
Entitlement Minutes	The amount of time within which the customer is entitled to a response or restoration of product service, depending on the entitlement type.
Service Level	The authorized hours of operation, or prime period of maintenance, offered by a service level entitlement. The system uses the service level to calculate response and restore deadlines on service orders for customers who have guaranteed response and restore entitlements.

Coverage Type

The type of coverage offered by a guaranteed coverage entitlement. Guaranteed coverage entitlements define a specific type of coverage for a specific amount of time. A guaranteed coverage entitlement can offer one of the following coverage types:

EXP (expense): Indicates that the **Percent Covered** portion of any expenses associated with completing the customer's service order will not be charged to the customer during the time period defined by the **Coverage Length** and **Unit** fields.

MAT (material): Indicates that the **Percent Covered** portion of the cost of any materials required to complete the customer's service order will not be charged to the customer during the time period defined by the **Coverage Length** and **Unit** fields.

TIME: Indicates that the **Percent Covered** portion of the cost of any labor required to complete the customer's service order will not be charged to the customer during the time period defined by the **Coverage Length** and **Unit** fields.

Uplift/Discount

The uplift or discount percentage to add to the base price of the service agreement line that includes this entitlement. The system applies the uplifts or discounts to the base price when you click the Calculate Final Price button on the Agreement Line page of the Agreement component. The Agreement Line page is documented later in this chapter.

The **Last Modified** field displays a time stamp showing when the default entitlements record was updated and the user ID of the person who made the change.

Template Line Page

Usage	Use the Template Line page to define agreement lines for a model agreement.
Object Name	RF_AGREETEMP_LINE
Navigation	Administer Agreements, Manage Agreements, Use, Agreement Template
Access Requirements	Select the Template Line tab.

Agreement Template Entitlement Defaults Template Line

Template ID: STANDARD SetID: CRM01 1

Agreement Line Details View All First 1 of 1 Last

Line Number: 1

Description:

Pricing Information

Service:

Product:

Purchase Option:

Prepaid Quantity:

Entitlements First 1-6 of 6 Last

*Description	Type	Minutes	Service Level	Coverage Percent	Length Unit	Uplift / Discount
1 One hour guaranteed response	Response	60				50
2 Four hour guaranteed restore	Restore	240				50
3 Premium Service Level	Svc Level		EXT			50
4 Premium Expense Coverage	Coverage			Expenses	75 1 YR	50
5 Premium Material Coverage	Coverage			Material	75 1 YR	50
6 Premium Time Coverage	Coverage			Time	75 1 YR	50

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Template Line page

The system displays the **Agreement Template ID** and **SetID** defined on the Agreement Template page.

Agreement Line Details

The **Agreement Line Details** grid lists the following information for each agreement line:

Line Number

The agreement line number. The system automatically increments this number for each row you add. The agreement line number and description display on cases and service orders that are covered by the agreement line entitlements.

Description

A description of the agreement line. For informational purposes, you can enter a description using up to 30 alphanumeric characters.

Pricing Information

The **Pricing Information** group box defines the default criteria for retrieving pricing records for an agreement line.

Service

The identification of the service covered by the agreement line. For field service agreements, select a service. Support agreements do not reference services. Services must first be defined in your system with the Services component. The system prompt only displays services with an *Active* status and for which the Agreement check box has been selected on the Service definition page. At save time the system validates that the agreement start date falls on or between the offer start date and the offer end date defined for the service. Click the transfer button to access the Service component.

For more information about service definitions, see Setting Up Your Services in the *PeopleSoft CRM FieldService PeopleBook*.

Product

The identification of the product covered by the agreement line. If you selected a service, the system prompt displays all the products defined for the service. If no service is selected, the system prompt displays all products defined in your system. Products must first be established in your system with the Product EIP or the Product Definition component. Click the transfer button to access the Product Definition component.

For more information about product definition, see the Setting Up Products chapter.

Purchase Option

The method of purchasing the service or support offering for an agreement transaction. The prompt displays only those purchase options for the service or service-product combination for which a price has already been defined on the Pricing Information page. The following options are available for an agreement pricing record:

Flat: Indicates that the service or support offering is purchased for a flat fee.

Prepaid: Indicates that a specified number of work units of the service or support offering is purchased in advance.

Prepaid Quantity

The number of work units of a service or support offering that a customer pays for in advance. This value only applies to the **Prepaid** purchase option.

Entitlements

The **Entitlements** grid lists the entitlements contractually owed to the customer for an agreement line. When you add a new agreement line, the system populates this grid using the set of entitlements defined on the Entitlement Defaults page, which is documented in the previous section.

The **Last Modified** field displays a time stamp showing when the agreement template line was updated and the user ID of the person who made the change.

Defining Agreements

Use the Agreement component to record and manage the agreements issued to your customers. When a case or service order is created for a customer, the system searches for agreement lines that cover the case or service order and displays the associated entitlements. The system also displays any transaction price information defined under the terms of the agreement.

For more information about entitlement searches, see the Performing Entitlement Searches for Cases and Service Orders chapter. **For more information** about agreement pricing calculations, see Understanding Agreement Pricing in this chapter.

Agreement Page

Usage	Use the Agreement page to define or view the header information for an agreement.
Object Name	RF_AGREEMENT_HDR
Navigation	Administer Agreements, Manage Agreements, Use, Agreements
Access Requirements	Enter a setID and agreement code.

Agreement		Scope Details	Default Entitlements	Agreement Line
SetID:	CRM01	Template ID:	<input type="text"/>	<input type="button" value="Copy from Template"/> <input type="button" value="Renew Agreement"/>
Name and Applicability				
Agreement:	COM-AGR-103	*Status:	Available	
Renewal Number:	1			
*Scope:	Site	Max. Contacts:	<input type="text"/>	
Start Date:	04/05/2001	End Date:	04/05/2002	
Customer Information				
Customer:	Lakeview Community College			
Admin. Contact:	<input type="text"/>			
Contact Site:	<input type="text"/>			
Phone:	Int'l Prefix:	<input type="text"/>	Ext:	<input type="text"/>
Coverage				
Provider Group Name:	Appliances Western			
Group Member Name:	<input type="text"/>			
Billing Information				
Currency Code:	USD	Payment Method:	<input type="text"/>	
Uplift/Discount %:	10	Purchase Order:	<input type="text"/>	
<input type="button" value="Calculate Price"/>		Credit Card Type:	<input type="text"/>	
Base Price:	1172.00	Credit Card Number:	<input type="text"/>	
Total Price:	1289.20	Expire Month / Year:	<input type="text"/> / <input type="text"/>	
Billing Start Date:	<input type="text"/>	Authorization Status:	<input type="text"/>	
Billing Frequency:	<input type="text"/>	Authorization Code:	<input type="text"/>	
Payment Terms:	<input type="text"/>	Authorization Date:	<input type="text"/>	
Last Modified: 05/09/2001 4:03PM PDT DVP1				

Agreement page

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

When you are creating a new agreement, you can select an appropriate agreement **Template ID** and click the **Copy from Template** button to populate the pages of the Agreement component with the agreement information established in the Agreement Template component.

For more information about agreement templates, see Defining Agreement Templates in this chapter.

If an agreement has expired, you can click the **Renew Agreement** button to create a copy of the expired agreement. Every field is copied from the old agreement to the new agreement. The system sets the start date of the new agreement to the end date of the old agreement and the new end date equal to the new start date plus one day and one year. You can establish new start and end dates for the renewed agreement and modify the agreement information as necessary.

Name and Applicability

The fields under **Name and Applicability** reflect the agreement's name and renewal number, scope, status, and the time period in which it is in effect.

Agreement	The name of the agreement that you entered to access the page.
Renewal Number	Indicates the renewal version of the agreement. When an agreement is first created, this value is set to one. Each time you renew the agreement by clicking the Renew Agreement button, the system creates a new version of the existing agreement and increments this value by 1.
Status	<p>The status of the agreement: <i>Available</i>, <i>Obsolete</i>, or <i>Processing</i>. The default value for new agreements is <i>Available</i>. No system processes change the status value of the agreement, but you can manually change the status as necessary. When an entitlement search is performed for a case or a service order, the system includes only agreements with an <i>Available</i> status that are in effect on the date the search is performed.</p> <p>Note. When renewing an agreement, you should manually adjust the status of the old agreement to <i>Obsolete</i> on the date that it expires and ensure that the status of the new agreement is set to <i>Available</i>. For example, if you renew an agreement one week before it expires, the new agreement should have a status of <i>Processing</i> and the old agreement should retain its status of <i>Available</i> until the renewal date matches the current date. At that point the old agreement status should be set to <i>Obsolete</i>, and the new agreement status should be set to <i>Available</i>.</p> <p>For more information about entitlement searches, see the Performing Entitlement Searches for Cases and Service Orders chapter.</p>
Scope	<p>The scope of the agreement:</p> <p>Site: Indicates that the agreement applies to sites specified on the Scope Details page.</p> <p>Contact: Indicates that the agreement applies to named callers specified on the Scope Details page.</p> <p>Note. A scope of <i>Contact</i> is not applicable to field service agreements. Only support agreements can have a scope of <i>Contact</i>.</p>
Max. Contacts	For an agreement with a Scope of <i>Contact</i> , the maximum number of named callers that can be specified for the agreement on the Scope Details page.

Start Date	The beginning of the effective period for the agreement.
End Date	The end of the effective period for the agreement.

Customer Information

The fields under **Customer Information** capture the customer's name, site, and contact information for agreement invoicing and administration purposes.

Customer	The name of the customer. Customers must first be established in your system using the Customer EIP or the Maintain Customer component. For more information about customer definition, see the Managing Customer Information chapter.
Admin. Contact (administration contact)	The name of the customer's agent to contact about agreement administration issues, such as renewing and remitting payment for agreements.
Contact Site	The site associated with the Admin. Contact (administration contact) for the agreement.
Phone	The telephone information for the Admin. Contact . You can enter the Int'l Prefix (international prefix), the telephone number, and Ext (extension), as applicable.

Coverage

The fields under **Coverage** define the default service order assignment values for service orders created under the terms of this agreement. If no values are specified here, the system uses the default values defined for the service on service orders.

Provider Group Name	The name of the provider group that will perform the service request covered by this agreement.
Group Member Name	The name of the provider group member that performs the service request covered by this agreement.

Billing Information

For informational purposes only, the fields under **Billing Information** capture information that can be used to determine how much to charge the customer for the agreement and the method of remittance that the customer will use.

Currency Code	The currency used for agreement pricing. On the Agreement Line page of this component, you can only select pricing records defined for the currency you specify here. After the pricing values have been defined for any of the agreement lines, the system only allows you to change the selected currency if you first clear the pricing values on the agreement lines.
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Uplift/Discount%	The uplift or discount percentage to apply to the Base Price of the agreement. Enter an appropriate value. Discounts are entered with a minus sign preceding the amount; uplifts are entered without a sign.
Calculate Price	Click the Calculate Price button after completing the information on the Agreement Line page to have the system calculate the Base Price of the agreement by summing the prices of the agreement lines and the Total Price by applying any uplift or discount percentage specified in the Uplift/Discount % field to the base price.
Base Price	A system-calculated value representing the sum of the final line prices on the agreement lines. After entering the lines of the agreement on the Agreement Line page, click the Calculate Price button to populate this field.
Total Price	A system-calculated value representing the Base Price multiplied by the Uplift/Discount% value.
Billing Start Date	The date billing processing began for this agreement.
Billing Frequency	The period of the billing cycle. You may choose to bill your customer <i>Annually</i> , <i>Bi-Weekly</i> , <i>Monthly</i> , or <i>Quarterly</i> .
Payment Terms	Indicates when payment is due: <i>Free:</i> No payment due. <i>Net 30:</i> Payment due within 30 days of the Billing Start Date . <i>Net 90:</i> Payment due within 90 days of the Billing Start Date . <i>Pay Full:</i> Payment due immediately.
Payment Method	Indicates the customer's method of payment: <i>Check</i> , <i>Credit Crd</i> (credit card), or <i>PO</i> (purchase order).
Purchase Order	The purchase order number, if the customer's Payment Method is <i>PO</i> .
Credit Card Type	The type of credit card the customer is using, if the customer's Payment Method is <i>Credit Card</i> . As delivered, the system offers the following credit card options: <i>AMEX</i> (American Express), <i>Diners Clu</i> (Diners Club), <i>Discover</i> , <i>EnRoute</i> , <i>MasterCard</i> , and <i>Visa</i> .
Expire Month / Year	The month and year that the customer's credit card expires.
Credit Card Number	The credit card number provided by the customer, if the customer's Payment Method is <i>Credit Crd</i> (credit card).

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

Authorization Status

The current state of authorization for the credit card transaction.

For more information about authorization status values, see Managing Credit Card Payments 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 the credit card authorization was received.

The **Last Modified** field displays a time stamp showing when the agreement header was updated and the user ID of the person who made the change.

Scope Details Page

Usage	Use the Scope Details page to define the people entitled to call center support or customer sites that are entitled to the service detailed by one or more of the agreement lines.
Object Name	RF_AGREEMENT_COV
Navigation	Administer Agreements, Manage Agreements, Use, Agreements
Access Requirements	Select the Scope Details tab.

Agreement		Scope Details		Default Entitlements		Agreement Line	
Agreement:	COM-AGR-103	SetID:	CRM01				
Start Date:	04/05/2001	End Date:	04/05/2002				
Customer:	Lakeview Community College	Scope:	Site				

Valid Sites				View All		First	1-4 of 4	Last
Site	Description		SIN					
1 FARGO	Fargo		SIN0000006					
2 GARRISON	Garrison		SIN0000007					
3 HILLSBORO	Hillsboro		SIN0000008					
4 RIVERDALE	Riverdale		SIN0000009					

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Scope Details page

The system displays the **Agreement** identification, **SetID**, the **Start Date** and **End Date** of the agreement, the **Customer**, and the Scope of the agreement defined on the Agreement page.

The system displays one of two grids depending on the scope of the agreement specified on the Agreement page. For an agreement with a scope of *Contact*, the system displays the **Named Callers** grid. For an agreement with a scope of *Site*, the system displays the **Valid Sites** grid.

Named Callers

The **Named Callers** grid lists people who are eligible to request support related to this agreement.

Name

The name of the person who is entitled to request support defined by the agreement lines. Named callers must first be established in your system using the Contacts page of the Maintain Customers component. The number of contacts you specify cannot exceed the number of Max Contacts (maximum contacts) recorded on the Agreement page.

PIN (personal identification number)

A unique value generated by the system when the agreement is saved for each named caller that is added to the grid. Customers calling to request support under the terms of the agreement provide their PIN to your customer service representative (CSR). The system uses the PIN that the CSR enters on cases to identify the agreement line that defines the customer's entitlements.

Note. The PIN is unique for every person within an agreement. For example, if a person is a named caller on two agreements, he or she will be assigned two PINs.

Primary

Indicates whether the named caller is the primary named caller (for informational purposes only).

Valid Sites

The **Valid Sites** grid lists all the customer sites that may be associated to agreement lines for the agreement. The sites attached to an agreement line indicate which sites are eligible to receive the support or services specified on the agreement line.

Site	<p>The identification of the site defined for the customer on the Site page of the Maintain Customer component.</p> <p>For more information about the Maintain Customer component, see the Managing Customer Information chapter.</p>
Description	The description of the site.
SIN (site identification number)	<p>A unique value generated by the system when the agreement is saved for each site that is added to the grid. Customers calling to request service under the terms of the agreement provide their SIN to your customer service representative (CSR). The system uses the SIN that the CSR enters on cases or service orders to identify the agreement line that defines the customer's entitlements for a particular site.</p> <p>Note. The SIN is unique for every site within an agreement. For example, if a site is a valid site on two agreements, the site will be assigned two SINS.</p>

The **Last Modified** field displays a time stamp showing when the scope record was updated and the user ID of the person who made the change.

Default Entitlements Page

Usage	Use the Default Entitlements page to identify a set of entitlements to use as default values for the rows added on the Agreement Line page.
Object Name	RF_AGREEMENT_ENTL
Navigation	Administer Agreements, Manage Agreements, Use, Agreements
Prerequisites	<p>Entitlements must first be defined on the Entitlements page.</p> <p>For more information about entitlement definition, see Defining Entitlements in this chapter.</p>
Access Requirements	Select the Default Entitlements tab.

Agreement		Scope Details		Default Entitlements		Agreement Line	
Agreement:	COM-AGR-103			SetID:	CRM01		
Start Date:	04/05/2001			End Date:	04/05/2002		
Customer:	Lakeview Community College						
Entitlement Plan Name: <input type="text"/>							
First 1 of 1 Last							
*Description	Entitlement Minutes	Service Level	Coverage Type	Percent Covered	Length	Unit	Uplift / Discount
1 <input type="text"/>							
Last Modified: 05/09/2001 4:03PM PDT DVP1							

Default Entitlements page

The system displays the **Agreement** identification, **SetID**, the **Start Date** and **End Date** of the agreement, and the **Customer** defined on the Agreement page.

Default Entitlements

The **Entitlement Plan Name** determines the set of entitlements that initially populate the grid. When you define a new agreement, you can select an entitlement plan to populate the grid with a pre-defined set of entitlements. You can add or delete entitlements from this set as necessary. Entitlement plans must first be defined on the Entitlement Plan Setup page.

For more information about the Entitlement Plan Setup page, see Setting Up Entitlement Plans in this chapter.

The set of entitlements defined in the grid becomes the default entitlement set for each new line added on the Agreement Line page.

Note. Any changes you make to the defaults will not affect any existing agreement lines.

You can add or delete entitlements on the agreement line as necessary to define the final set of entitlements contractually owed to the customer for a specific agreement line. The grid displays the current set of default entitlements.

Description

The description of the selected entitlement. Entitlements must first be defined on the Entitlements page.

Entitlement Minutes

The amount of time within which the customer is entitled to a response or restoration of product service, depending on the entitlement type.

Service Level

The authorized hours of operation, or prime period of maintenance, offered by a service level entitlement. The call center agent can use the service level to manually calculate response and restore deadlines on service orders for customers who have guaranteed response and restore entitlements.

Coverage Type

The type of coverage offered by a guaranteed coverage entitlement. Guaranteed coverage entitlements define a specific type of coverage for a specific amount of time. A guaranteed coverage entitlement can offer one of the following coverage types:

EXP (expense): Indicates that the **Percent Covered** portion of any expenses associated with completing the customer's service order will not be charged to the customer during the time period defined by the **Coverage Length** and **Unit** fields.

MAT (material): Indicates that the **Percent Covered** portion of the cost of any materials required to complete the customer's service order will not be charged to the customer during the time period defined by the **Coverage Length** and **Unit** fields.

TIME: Indicates that the **Percent Covered** portion of the cost of any labor required to complete the customer's service order will not be charged to the customer during the time period defined by the **Coverage Length** and **Unit** fields.

Uplift/Discount

The uplift or discount percentage to add to the base price of the service agreement line that includes this entitlement. The system applies the uplifts or discounts to the base price when you click the Calculate Final Price button on the Agreement Line page of this component.

The **Last Modified** field displays a time stamp showing when the default entitlements record was updated and the user ID of the person who made the change.

Agreement Line Page

Usage	Use the Agreement Line page to define a specific set of entitlements for each service or support offering covered by the agreement.
Object Name	RF_AGREEMENT_LINE
Navigation	Administer Agreements, Manage Agreements, Use, Agreements
Access Requirements	Select the Agreement Line tab.

Agreement Scope Details **Default Entitlements** Agreement Line

Agreement: COM-AGR-103 **SetID:** CRM01
Start Date: 04/05/2001 **End Date:** 04/05/2002
Customer: Lakeview Community College

Agreement Line Details [View All](#) First 1 of 3 Last

Line Number: 1 + -
Description: PM on Air Conditioners

Retrieve Base Line Price

Service: Preventive Maintenance Service for Air C + -
Product: SR1002 + - 6000 BTU Room Air (Grey)
Purchase Option: FLAT + -
Prepaid Quantity: + -
Retrieve Price

Prepaid Rate: + - USD Per: + -
Base Line Price: 10.00 USD Per: Month

Price Per Transaction

Purchase Option: + -
Price: + - USD Per: + -

Remaining Quantity:

Calculate Final Line Price Calculate Final Price

Entitlement Adjustment: 15.00 %
Base Price/Month: 11.50 USD
Agreement Duration: 12.00 months
Installed Product Quantity: 4
Final Line Price: 552.00 USD

New Calculation Values

Entitlement Uplift/Discount: 15 %
Agreement Duration: 12.00 months

Agreement Line page (1 of 2)

Valid Sites [Find](#) First 1-2 of 2 Last

Select Line Site	Site ID	Description	
1 Select Line Site	FARGO + -	Fargo	+ -
2 Select Line Site	RIVERDALE + -	Riverdale	+ -

Entitlements [Find](#) First 1-3 of 3 Last

*Description	Type	Minutes	Service Level	Coverage	Percent Length Unit	Uplift / Discount
1 One day guaranteed response + -	Response	1440				+ -
2 One day guaranteed restore + -	Restore	1440				+ -
3 Extended Service Level + -	Svc Level		EXT		15	+ -

Products Under Service [Find](#) First 1-4 of 4 Last

Select Installed Product	Installed Product ID	Description	Serial Number	Asset Tag	Qty	Name	
1 Select Installed Product	INS0000025 + -	6000 BTU Room Air (Grey)	SR1002-1031		1.0000	Fargo	+ -
2 Select Installed Product	INS0000026 + -	6000 BTU Room Air (Grey)	SR1002-1032		1.0000	Garrison	+ -
3 Select Installed Product	INS0000027 + -	6000 BTU Room Air (Grey)	SR1002-1033		1.0000	Riverdale	+ -
4 Select Installed Product	INS0000038 + -	6000 BTU Room Air (Grey)	SR1002-1041		1.0000	Hillsboro	+ -

Agreement Line page (2 of 2)

The system displays the **Agreement** identification, **SetID**, the **Start Date** and **End Date** of the agreement, and the **Customer** defined on the Agreement page.

Agreement Line Details

The **Agreement Line Details** scroll area lists the following information for each agreement line:

Line Number	The agreement line number. The system automatically increments this number for each row you add. The agreement line number displays on cases and service orders that are covered by the agreement line entitlements.
Description	A description of the agreement line. For informational purposes, you can enter a description using up to 30 alphanumeric characters.

Retrieve Base Line Price

The **Retrieve Base Line Price** group box reflects the base price of the agreement line based on the agreement pricing record defined for the service or support offering on the Pricing Information page. Select the applicable **Service**, **Product**, **Purchase Option**, and **Prepaid Quantity** values that correspond to the appropriate agreement pricing record and click the **Retrieve Price** button. This will populate the **Prepaid Rate** (if applicable), the **Base Line Price**, and the corresponding transaction rates with the pricing record information. For support agreements, leave the **Service** field blank and fill in the values for the **Product**, **Purchase Option** and **Prepaid Rate** (if applicable) that correspond to the appropriate agreement pricing record and click the **Retrieve Price** button. This will populate the **Base Line Price**, (and the **Prepaid Rate**, if applicable), as well as the corresponding transaction rates with the pricing record information. For support agreements you can also manually define pricing for a support offering. To do this, leave the **Service**, **Product**, **Purchase Option**, and **Prepaid Quantity** fields blank and enter values for the **Base Line Price** and **Per** fields. Lines with no Service and no Product that have manual prices added will be treated as flat rate lines.

Service	The identification of the service covered by the agreement line. For field service agreements, select a service. Support agreements do not reference services. Services must first be defined in your system with the Services component. The system prompt only displays services with an <i>Active</i> status and for which the Agreement check box has been selected. At save time, the system will validate that the agreement start date falls on or between the offer start date and the offer end date defined for the service. Click the transfer button to access the Service component.
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For more information about service definitions, see *Setting Up Your Services* in the *PeopleSoft CRM FieldService PeopleBook*.

Product

The identification of the product covered by the agreement line. If you selected a service, the system prompt displays all the products defined for the service. If no service is selected, the system prompt displays all products defined in your system. Products must first be established in your system with the Product EIP or the Product Definition component. Click the transfer button to access the Product Definition component.

For more information about defining products, see the Setting Up Products chapter.

Note. Field service agreements always include a **Service** and may also include a **Product**. Support agreements never include a **Service**, but should include a **Product**.

Purchase Option

The method of purchasing the service or support offering for an agreement transaction. The prompt displays only those purchase options for the service or service-product combination for which a price has already been defined on the Pricing Information page. The following options are available for an agreement pricing record:

Flat: Indicates that the service or support offering is purchased for a flat fee.

Prepaid: Indicates that a specified number of work units of the service or support offering is purchased in advance.

Prepaid Quantity

The number of work units of a service or support offering that a customer pays for in advance. This value only applies to the **Prepaid** purchase option.

Retrieve Price

Click this button after selecting the applicable **Service**, **Product**, **Purchase Option**, and **Prepaid Quantity** values to populate the **Prepaid Rate** and **Base Line Price** rates with prices defined on the corresponding pricing record that was entered on the Pricing Information page.

Prepaid Rate

Indicates the amount paid **Per** each work unit of the **Prepaid Quantity**. Rates retrieved from an agreement pricing record with a prepaid purchase option can be by the **Case**, the **S.O.** (service order), or for a number or hours (**Hour**) of work. If you are entering an amount manually for a support agreement, you can also specify rates for a number of days (**Day**) months (**Month**), weeks (**Week**) or years (**Year**) of work. The currency displayed for the rate reflects the currency entered on the Agreement page of this component.

Base Line Price

Indicates the amount paid **Per** each unit of work or **Per** each unit of time, depending on the purchase option of the agreement. Rates retrieved from an agreement pricing record with a flat purchase option can be by the ***Hour, Day, Week, Month, or Year.*** Rates retrieved from an agreement pricing record with a prepaid purchase option can be by the ***Case, the Service Order,*** or for a number of hours (***Hour***) of work. If you are entering an amount manually for a support agreement, you can also specify support rates for an ***Item*** (which corresponds to a product) or for a number of days (***Day***) months (***Month***), weeks (***Week***) or years (***Year***) of work. The currency displayed for the rate reflects the currency entered on the Agreement page of this component.

Price Per Transaction

The fields in the **Price Per Transaction** group box reflect the transaction price on the corresponding agreement service pricing record based on the service or service-product combination defined for the agreement line. In other words, the system will match the value for the service and product fields on the agreement line with the unique pricing record entry that contains the same service and product values and an "Applies to" value of *Agreement Service* and the appropriate currency code. Note that you should never define more than one agreement service entry in the pricing table for the same combination of service, product, and currency code (this would imply that you have multiple prices for a single transaction).

For support agreements you can also manually define transaction pricing for a support offering. To do this, leave the **Service, Product, Purchase Option, and Prepaid Quantity** fields blank and enter values for the **Base Line Price** and **Per** fields. Lines with no **Service** or **Product** entries will be treated as flat rate entries. When you perform an entitlement search from a case or a service order, the system displays the transaction price or the remaining quantity defined on the customer's agreement.

Note. A credit card link on support cases is enabled when the associated agreement line includes a price per transaction and does not entitle the customer to 100% coverage of time, material, and expenses.

For more information about credit card functionality in Peoplesoft Support, see Understanding Credit Card Transactions in the *PeopleSoft CRM FieldService PeopleBook*. **For more information** about entitlement searches, see the Performing Entitlement Searches for Cases and Service Orders chapter.

Purchase Option

The method of purchasing the service or support offering for an agreement or agreement service transaction. The following options are available:

Flat: Indicates that the service or support offering is purchased for a flat fee.

Prepaid: Indicates that a specified number of work units of the service or support offering is purchased in advance. This purchase option only applies pricing records for agreement transactions.

T&M (time and material): Indicates that the price of the service or support offering is based on the labor rate. This purchase option only applies to pricing records for an agreement service transaction.

Price

Indicates the amount paid **Per** each unit of work or **Per** each unit of time, depending on the purchase option of the agreement. Rates retrieved from an agreement service pricing record with a flat purchase option can be by the **Hour, Case** or **Service Order**. Rates retrieved from an agreement service pricing record with a time and material purchase option can be per unit of time—**Hour, Day, Week, Month, or Year**. For support agreements for which no product has been defined, you can also manually enter a transaction price using any of the work or time-based units. The currency displayed for the rate reflects the currency entered on the Agreement page of this component.

Remaining Quantity

The amount of the prepaid quantity that has not been consumed. For field service agreements, the prepaid quantity is in units of service orders or hours: the system decrements this quantity each time a service order covered by the agreement line is saved. If the service order is canceled, the system increments the remaining quantity.

For support agreements, the prepaid quantity is in units of cases or hours. Workflow processes must be implemented to update remaining quantity on support agreements.

For more information about setting up workflow processes to manage remaining quantity on support agreements, see Setting Up Component Event Processing in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook*.

Calculate Final Line Price

The **Calculate Final Line Price** group box displays the variables the system used to calculate the **Final Line Price** for the agreement line. The **Final Line Price** of each agreement line can be summed to calculate the base price of the entire agreement. When you click the **Calculate Final Price** button, the system sums the uplift and discount percentages associated with the entitlements on the line and applies the total percentage to the base line price.

Entitlement Adjustment

Indicates the sum of the uplift and discount percentage values associated with the entitlements on the agreement line that the system calculated the last time the **Calculate Final Price** button was clicked.

	<p>Note. If this value does not match the Entitlement Uplift/Discount value in the New Calculation Values group box, the final price of the agreement line should be recalculated.</p>
Base Price/Month	<p>Indicates the base price per month of the agreement line. Because the final line prices must all be expressed in the same time unit before they can be summed, the system converts all base price rate to months. The conversion algorithm assumes 12 30-day months per year.</p> <p>Note. For agreement lines with a prepaid purchase option, this value is informational only. The prepaid rate, not the base price/month, is used to calculate the final line price for an agreement line with a prepaid purchase option.</p>
Agreement Duration	<p>The number of months for which the agreement is valid, assuming 12 30-day months per year. To calculate this value, the system determines the number of days between the start and end dates on the agreement based on a 360 day year, and divides the result by 30.</p> <p>Note. If this value does not match the Agreement Duration value in the New Calculation Values group box, the final price of the agreement line should be recalculated.</p>
Installed Product Quantity	<p>The total number of installed product records listed in the Products Under Service grid for the agreement line.</p>
Final Line Price	<p>The final price for the agreement line. For agreement lines with a flat or time-and-material purchase option, the system calculates this value by multiplying the Base Price/Month by the Installed Product Quantity and by the number of months between the agreement start and end dates. For prepaid agreement lines, this value equals the Prepaid Rate x Prepaid Quantity x Entitlement Adjustments defined on the agreement line.</p>

New Calculation Values

The **New Calculation Values** group box lists the current values for the entitlement adjustment and the agreement duration. If these values do not match the values used to calculate the final line price, the agreement price is not accurate—that is, the agreement price does not reflect the newly changed values for entitlements or agreement duration. To make the line price reflect the new values, click the **Calculate Final Price** button. To make the final Agreement price reflect this new line price, click the Calculate Price button on the Agreement tab page.

Entitlement Uplift/Discount	Indicates the current sum of the uplift and discount percentage values associated with the entitlements on the agreement line.
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Agreement Duration

The number of months for which the agreement is valid, assuming 12 30-day months per year. To calculate this value, the system determines the number of days between the start and end dates on the agreement based on a 360 day year and divides the result by 30.

Valid Sites

For an agreement with a scope of *Site*, the **Valid Sites** grid list the customer sites that are eligible to receive support or services related to this agreement line.

Select Line Site

Click this button to select sites covered by the agreement line. Choices will be displayed on the Valid Sites page, which is documented later in this chapter. The system displays only sites defined as valid sites for the agreement on the Scope Details page of this component.

Site ID

The identification of the site which is covered by this agreement line.

Description

The description of the site.

Entitlements

The **Entitlements** grid list the entitlements contractually owed to the customer for an agreement line. When you add a new agreement line, the system populates this grid using the set of entitlements defined on the Default Entitlements page of this component.

For more information about the fields in the **Entitlements** grid, see the Default Entitlements Page in this chapter.

Products Under Service

The **Products Under Service** grid list the customer's installed products that are eligible for the service or support specified on the agreement line. Installed product information must be manually added to the agreement. However, once the records have been added to the agreement, the system automatically updates the installed product information on the agreement line to reflect replacements made at the customer's site recorded using the Manage Material component.

Before selecting an installed product, you must define a product for the agreement line, and, for agreements with a scope of *Site*, select the sites that will be covered by the line. If the scope of the agreement is *Site*, the installed product choices are limited to those that match the product and sites specified. If the scope of the agreement is *Contact*, the installed product choices are limited to those that match the product and customer specified. Regardless of the agreement scope, the system prompt for installed products does not include installed product records with a status of *Uninstalled*.

For more information about installed products, see the Tracking Installed Products chapter. **For more information** about the Manage Material component, see Managing Service Order Material Requirements in the *PeopleSoft CRM FieldService PeopleBook*.

Select Installed Product	Click this button to select an installed product from the list shown on the Installed Product List page, which is documented later in this chapter.
Installed Product ID	The identification of the installed product record. Installed product records must first be established on the Installed Product page.
Description	The description of the product on the installed product record.
Serial Number	The serial number on the installed product record.
Asset Tag	The asset tag on the installed product record, if applicable.
Site	The site on the installed product record.
Quantity	The quantity on the installed product record, if applicable.

Valid Sites Page

Usage	Use the Valid Sites page to select the sites covered by an agreement line. Only sites defined as valid sites for the agreement on the Scope Details page of this component are available for selection.
Object Name	RF_AG_SITE_SEC
Navigation	Click the Select Line Site button on the Agreement Line page.

Valid Sites

First 1-4 of 4 Last

Select	Site ID	Site
<input type="checkbox"/>	1 FARGO	Fargo
<input type="checkbox"/>	2 GARRISON	Garrison
<input type="checkbox"/>	3 HILLSBORO	Hillsboro
<input type="checkbox"/>	4 RIVERDALE	Riverdale

OK Cancel

Valid Sites page

The grid lists all of the sites defined for the agreement on the Scope Details page.

Select	Indicates which sites are covered by the agreement line. Select one site and click OK to populate a line on the Valid Sites grid on the Agreement Line page with your choice. Click Cancel to return to the Agreement Line page without making a selection. To add another site to the agreement line, add another row to the site grid and select its site as previously described.
Site ID	The identification of the customer's site.
Site	The description of the customer's site.

Installed Product List Page

Usage	Use the Installed Product List page to select the applicable installed product records to add to the agreement line. Installed product records must first be established for the customer on the Installed Products page. For more information about installed product records, see the Tracking Installed Products chapter.
Object Name	RF_AG_PROD_SEC
Navigation	Click the Select Installed Product button on the Agreement Line page.

Installed Product List

Select	Product ID	Item ID	Installed Product ID	Serial ID	Asset Tag	Site ID	Site
1 <input type="checkbox"/>	SR1002	SR1002	INS0000025	SR1002-1031		FARGO	Fargo
2 <input type="checkbox"/>	SR1002	SR1002	INS0000026	SR1002-1032		GARRISON	Garrison
3 <input type="checkbox"/>	SR1002	SR1002	INS0000027	SR1002-1033		RIVERDALE	Riverdale
4 <input type="checkbox"/>	SR1002	SR1002	INS0000038	SR1002-1041		HILLSBORO	Hillsboro

First ◀ 1-4 of 4 ▶ Last

Installed Product List page

The grid lists all of the installed product records that matched the product ID selected for the Service Order page. If the agreement covering the service order has a scope of Site, the installed product records are limited to those that match the sites covered by the agreement line.

Select	Indicates the installed product to be selected for the agreement line. Select the check box of the applicable row and click OK to return to the Agreement Line page. The system will populate the Products Under Service grid with the value from the row you select. Click Cancel to return to the Agreement Line page without making a selection. To add another installed product, add another row to the Products Under Service grid as usual, and click the Select Installed Product button on the new row to prompt for another installed product.
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Product ID	The identification of the product installed at the customer site.
Item ID	The identification of the item installed at the customer site.
Installed Product ID	The identification of the installed product record.
Serial ID	The serial number recorded for the item on the installed product record, if applicable.
Asset Tag	The asset tag number recorded for the item on the installed product record, if applicable.
Site ID	The identification of the site defined for the customer on the Site page of the Maintain Customer component.
Site	The name of the site.

Defining Warranties

Use the Warranty component to define the duration and entitlements associated with a warranty. After a warranty is defined, it can be associated with items in your system on the Item Definition page. For specific items installed at a customer's site, you can activate the warranty on a customer's installed product record using the Installed Product component. When searching for entitlements for a product on a case or service order, the system first checks for a valid warranty on the customer's installed product record before checking for entitlements on an agreement.

For more information about item definition, see the Defining Items chapter. **For more information** about installed product records, see the Tracking Installed Products chapter. **For more information** about entitlement searches, see the Performing Entitlement Searches for Cases and Service Orders chapter.

Warranty Page

Usage	Use the Warranty page to define the product warranty agreements supported by your organization. A warranty definition can be associated with each item in your system on the Item Definition page. A warranty becomes effective for an installed product when start and end dates are defined for the warranty on the Installed Product page. For more information about warranties, see Understanding Agreements and Warranties in this chapter.
Object Name	RF_WARRANTY
Navigation	Administer Agreements, Manage Agreements, Use, Warranty
Access Requirements	Enter a setID and warranty name.

Warranty Name: BASIC-COM		SetID: CRM01	
Warranty Details			
Description: Standard Warranty for Commerical Customers			
Provider: Service Organization			
Critical Times			
Warranty Length: 09	Days for Refund: 10		
Unit: Month	Days to Return: 30		
Starts: Purchase	Days For Replacement: 60		
<input type="checkbox"/> RMA Required <input type="checkbox"/> Invoice Required <input type="checkbox"/> Walk-in Allowed <input type="checkbox"/> Shipment Allowed <input type="checkbox"/> On-Site Repair <input type="checkbox"/> Loaner Provided <input type="checkbox"/> Warranty Transferable			
Entitlement Plan Name: SILVER			
*Description	Entitlement Minutes	Service Level	Uplift / Discount
1 One day guaranteed response	1440		+ -
2 One day guaranteed restore	1440		+ -
3 Basic Expense Coverage		EXP	+ -
4 Basic Material Coverage		MAT	+ -
5 Standard Service Level		STD	+ -
Last Modified: 04/03/2001 3:49PM PDT NAPA			

Warranty page

The system displays the **Warranty Name** and **SetID** you entered to access the page.

Warranty Details

The fields under **Warranty Details** capture header level information for the warranty.

Description

A description of the warranty. When you define a new warranty, you can enter a description using up to 50 alphanumeric characters.

Provider

The organization that absorbs the cost of the services covered by the warranty: **Manufacturer**, **Retailer**, or **Service Organization**.

Critical Times

The fields in the **Critical Times** group box details the periods of coverage for the warranty for informational purposes only.

Warranty Length

The length of the warranty period.

Unit

The time unit of measure for the warranty period—**Day**, **Month**, **Week**, or **Year**.

Starts

The point at which the warranty coverage begins.

Install: Indicates that the coverage period begins on the date the item is installed at the customer site.

	<p>Order: Indicates that the coverage period begins on the date the order is placed for the item.</p> <p>Purchase: Indicates that the coverage period begins on the date the item is purchased.</p> <p>Ship. Indicates that the coverage period begins on the date the item is shipped to the customer.</p>
Days for Refund	Indicates the number of days from the date in the Starts field during which the customer is entitled to return the item for a full refund.
Days to Return	Indicates the number of days from the date in the Starts field during which the customer is entitled to return the item.
Days for Replacement	Indicates the number of days from the date in the Starts field during which the customer is entitled to return the item in exchange for a replacement item.
<p>For informational purposes, the check boxes in the center of the page indicate how warranty services are provided within your enterprise. When you define a new warranty, select the check boxes that apply to your business processes.</p>	
RMA Required (return material authorization required)	<p>Indicates that installed products under warranty must be returned for warranty services using RMA processing.</p> <p>For more information about RMA processing, see Managing Material Returns in the <i>PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook</i>.</p>
Invoice Required	Indicates that the customer must provide a copy of the invoice for an installed product under warranty before warranty services can be performed.
Walk-in Allowed	Indicates that the customer can bring installed products under warranty to your repair center.
Shipment Allowed	Indicates that the customer can ship installed products under warranty to your repair center.
On-Site Repair	Indicates that installed products under warranty can be serviced at the customer's site.
Loaner Provided	Indicates that the customer will be loaned a similar item while the installed product under warranty is being repaired.
Warranty Transferable	Indicates that when ownership of the installed product changes, the warranty remains in effect for the new owner.

Warranty Entitlements

The lower portion of the screen details the entitlements on the warranty. When you define a new warranty, you can select an **Entitlement Plan Name** to initially populate the grid with a pre-defined set of entitlements. You can add or delete entitlements from this set as necessary. Entitlement plans must first be established on the Entitlement Plan Setup page.

For more information about the Entitlement Plan Setup page, see Setting Up Entitlement Plans in this chapter.

Warning! If you change the entitlements offered by an existing warranty, you will also change the entitlements for any installed product covered by the warranty. Once a warranty has been associated with an installed product, we recommend against any modifications to the warranty definition on the Warranty page. Instead, define a new warranty with the required entitlements and update the warranty information on the Item Definition page to ensure that new installed product records have the correct warranty entitlements.

The grid displays the set of entitlements offered for installed products under warranty.

Description	The description of the selected entitlement. Entitlements must first be defined on the Entitlements page.
Entitlement Minutes	The amount of time within which the customer is entitled to a response or restoration of product service, depending on the entitlement type.
Service Level	The authorized hours of operation, or prime period of maintenance, offered by a service level entitlement. The call center agent can use the service level to manually calculate response and restore deadlines on service orders for customers who have guaranteed response and restore entitlements.
Coverage Type	<p>The type of coverage offered by a guaranteed coverage entitlement. Guaranteed coverage entitlements define a specific type of coverage for a specific amount of time. A guaranteed coverage entitlement can offer one of the following coverage types:</p> <p>EXP (expense): Indicates that the Percent Covered portion of any expenses associated with completing the customer's service order will not be charged to the customer during the time period defined by the Coverage Length and Unit fields.</p> <p>MAT (material): Indicates that the Percent Covered portion of the cost of any materials required to complete the customer's service order will not be charged to the customer during the time period defined by the Coverage Length and Unit fields.</p>

TIME: Indicates that the **Percent Covered** portion of the cost of any labor required to complete the customer's service order will not be charged to the customer during the time period defined by the **Coverage Length** and **Unit** fields.

Uplift/Discount

The uplift or discount percentage that would be added to the base price of the service agreement line that includes this entitlement. Uplifts and discounts do not apply to warranties.

The **Last Modified** field displays a time stamp showing when the warranty record was updated and the user ID of the person who made the change.

Performing Entitlement Searches for Cases and Service Orders

Entitlements define what the customer is contractually owed for the service or support offering on an agreement line or warranty. From the Service Order page and Case page, you can search for warranties or agreement lines that cover the work on the service order or case. Once the appropriate warranty or agreement line has been found, you can view the entitlements that apply to the work requested by the customer.

For more information about defining entitlements for warranties and agreements, see the Setting Up and Managing Agreements and Warranties chapter. **For more information** about cases, see Managing Cases in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook*. **For more information** about service orders, see Creating and Managing Service Orders in the *PeopleSoft CRM FieldService PeopleBook*.

The next sections explain how the system finds warranties and agreement lines that match criteria entered on the case or service order and document the pages the system displays to show the results of the entitlement search.

Understanding Entitlement Searches

When you perform an entitlement search, the system returns the warranty or agreement lines that match criteria available on the case or service order, such as customer, contact, personal identification number (PIN), product, serial number, site, and site identification number (SIN). If more than one warranty or agreement line matches the available criteria, this system prompts you to select the appropriate warranty or agreement on the Entitlements Match page. If the system finds only one match or when you make a selection on the Entitlements Match page, the system displays the entitlements for the agreement line or warranty on the Entitlements Detail page together with the transaction price information for the service on the service order or the support offering on the case.

When you click OK on the Entitlements Detail page, the system associates the agreement line or warranty with the case or service order. Once this association has been made, you can click a button on the service order or a link on the case to view the information on the Entitlements Detail page.

Before you can perform an entitlement search, the case or service order must include a customer. Additionally, cases also require one of the following: a site ID or site identification number (SIN) or a contact person or a personal identification number (PIN). Service orders

also need a site ID or a SIN in addition to the customer. You can further limit the search by entering a product ID. The system uses the information you enter to select appropriate installed product records for the customer. If you do not enter enough information to uniquely identify an installed product record for the customer, the system prompts you to select one of the installed product records that match the criteria you entered.

The next section details the algorithms the system uses to find warranties or agreements that match the available criteria on the case or service order when you perform an entitlement search.

Warranty Matches

If an installed product is entered on the service order or case, the system first checks for a valid warranty on the customer's installed product record. The system identifies the installed product record using the serial number or asset tag number entered on the case or service order.

If an installed product record has been specified, the system checks for the following conditions:

- a warranty is attached to the installed product
- the current date is equal to or later than the warranty start date
- the current date is equal to or prior to the warranty end date
- the status of the warranty is *Active*.

If all conditions are met, the system returns the warranty as a match.

Agreement Matches

The system searches for agreement line matches in addition to any warranty matches that are found. The system begins the search for applicable agreement lines by determining which agreements to include in the search. To be considered for the entitlement search, the current date must fall on or between the start and end dates on the agreement and the agreement must have a status of *Available*.

If a site or SIN has been entered, the system returns all agreement lines that match the SIN on agreements with a scope of *Site*. If no SIN is provided, the system returns all *Site* agreement lines that match the site ID. If both a SIN and a site ID are included on the case or service order, the system only uses the SIN to perform the agreement line match.

If a PIN has been entered, the system returns all agreement lines that match the PIN on agreements with a scope of *Contact*. If no PIN is provided, the system returns all *Contact* agreement lines where the person ID linked to the PINs for the named callers on the agreement matches the person ID associated with the contact person's name on the case. If both a PIN and a contact name are included on the case, the system only uses the PIN to perform the agreement line match. Note that field service agreements only use authentication by site or SIN (not by named callers). Therefore, no PIN field exists on the service order, and for entitlement searches initiated from a service order, the contact's person ID is ignored—that is, it is not matched against PIN entries in agreements.

If an installed product is selected on the case or service order, the system limits the agreement line matches as follows:

- If an installed product is identified on the case or service order line, the system returns all agreement lines which list the installed product as a product under service.
- If no installed product is identified, the system returns all agreement lines that match the product.

Entitlement Match Page

Usage	Use the Entitlement Match page to select a specific warranty or agreement when a customer has multiple agreements or warranties in effect.
Object Name	RF_ENTL_LIST_SEC
Navigation	<p>From the Service Order page, click the Search/View Entitlements button. From the Case page, select the Entitlement button. This page will display only if multiple agreements or warranties meet the entitlement search criteria.</p> <p>For more information about defining entitlements for warranties and agreements, see the Setting Up and Managing Agreements and Warranties chapter. For more information about the entitlement search algorithm, see Understanding Entitlement Searches in this chapter.</p>

Entitlement Match

Select One Line for Entitlements							First	1-2 of 2	Last
Select	Warranty Name	Agreement	Renewal Number	Line Description	Option	Prepaid Unit	Remaining Qty		
1 <input type="checkbox"/>	COM-AGR-101		1	PM on Air Conditioners PM for A/C	Flat		0.00		
2 <input type="checkbox"/>	COM-AGR-101		1	Repair service for A/C Repair A/C	Prepaid SO		10.00		

OK Cancel

Entitlement Match page

The grid lists the agreements or warranties that meet the entitlement search criteria entered for the service order or the case.

Select

Indicate the relevant agreement line or warranty by selecting the appropriate check box in this column and clicking the **OK** button. You can only select one agreement line or warranty.

Warranty Name

The name of the valid warranty on the customer's installed product record for the product ID and serial number (if applicable) entered on the case or service order.

Agreement	The name of the agreement in effect for the combination of customer, site, and product ID entered on the case or service order.
Renewal Number	The renewal number of the agreement.
Line	The agreement line number that specifies entitlements for the combination of customer, site, and product ID entered on the case or service order.
Description	The description associated with the agreement line and agreement line service, if applicable.
Option	<p>The method of purchasing the service or support offering for an agreement or agreement service transaction. The following options are available:</p> <p>Flat: Indicates that the service or support offering is purchased for a flat fee per transaction.</p> <p>Prepaid: Indicates that a specified number of work units of the service or support offering is purchased in advance. There is no transaction fee for the service or support offering as long as there is Remaining Qty (remaining quantity) for the agreement line.</p> <p>T&M (time and material): Indicates that the price of the service or support offering per transaction is based on the labor rate.</p>
Unit	The unit associated with the Remaining Qty . Transaction prices can be per Case, Day, Hour, Month, S.O. (service order), Week , or Year .
Remaining Qty (remaining quantity)	<p>The amount of the prepaid quantity that has not been consumed. As long as a positive quantity remains, there is no transaction fee for the service order or support offering. For field service agreements, the prepaid quantity is in units of service orders or hours and the system decrements this quantity each time a service order covered by the agreement line is saved. If the service order is canceled, the system increments the remaining quantity. For support agreements, workflow processes must be implemented to update remaining quantity.</p> <p>If the purchase option is prepaid and the remaining quantity is zero, the line is viewable but may not be selected (because no more prepaid units are available).</p> <p>For more information about setting up workflow processes to manage remaining quantity on support agreements, see Setting Up Component Event Processing in the <i>PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook</i>.</p>

Select a check box to indicate the relevant warranty or agreement line and click **OK** to return to the service order or case. The system populates the service order or case with the selected agreement or warranty information. Click **Cancel** to return to the service order or case without making a selection.

Note. As long as a service order has not yet been saved, you can perform another entitlement search from the case or service order and select a different warranty or agreement line entry. However, once the service order has been saved, you may not select a different entry. However, you can view the details of the warranty or agreement or line that was specified when the service order was saved.

Entitlement Details Page

Usage	Use the Entitlement Details page to view the entitlements and transaction price information defined on the agreement line or warranty that covers the service on a service order or the support offering on a case.
Object Name	RF_VIEW_ENTL_SEC
Navigation	<p>From the Service Order page, click the Search/View Entitlements button. This page will display only if an agreement line or warranty matches the specified entitlement search criteria or if an agreement line or warranty has been associated with the service order.</p> <p>From the Case page, click the Search Entitlements button. This page will display only if an agreement line or warranty matches the specified entitlement search criteria. Once an agreement line or warranty has been associated with the case, click the agreement name or warranty name link on the Case page to view the associated entitlements and transaction price information.</p> <p>For more information about defining entitlements for warranties and agreements, see the Setting Up and Managing Agreements and Warranties chapter. For more information about the entitlement search algorithm, see Understanding Entitlement Searches in this chapter.</p>

Entitlement Details: Agreement: COM-AGR-101 Line: 1

Pricing Information			
Transaction Price:	50.00	USD	Per: Service Order
Service Purchase Option:	Flat	Remaining Quantity:	

Entitlement Details:		First	1-3 of 3	Last
Entitlement Name	Description			
1 1 DAY-RESP	One day guaranteed response			
2 1 DAY-REST	One day guaranteed restore			
3 EXT-SL	Extended Service Level			

OK Cancel

Entitlement Details page

Pricing Information

The **Pricing Information** grid displays the transaction price defined on the agreement line or the remaining quantity of the service or support offering that the customer purchased in advance. Because warranties are not priced, no field values appear in this group box for a warranty.

Transaction Price

Indicates the amount paid **Per** each unit of work or **Per** each unit of time, depending on the purchase option of the agreement line. Rates retrieved from an agreement line with a flat purchase option can be by the **Case**, **Service Order**, or **Hour**. Rates retrieved from an agreement line with a time and material purchase option can be per unit of time—**Hour**, **Day**, **Week**, **Month**, or **Year**. The currency displayed for the rate reflects the currency defined for the associated agreement.

Service Purchase Option

The method of purchasing the service or support offering for an agreement or agreement service transaction. The following options are available:

Flat: Indicates that the service or support offering is purchased for a flat fee per transaction.

Prepaid: Indicates that a specified number of work units of the service or support offering is purchased in advance. There is no transaction fee for the service or support offering as long as there is **Remaining Qty** (remaining quantity) for the agreement line.

T&M (time and material): Indicates that the price of the service or support offering per transaction is based on the labor rate.

Remaining Qty (remaining quantity)

The amount of the prepaid quantity that has not been consumed. As long as a positive quantity remains, there is no transaction fee for the service order or support offering. For field service agreements, the prepaid quantity is in units of service orders or hours. For support agreements, the prepaid quantity is in units of cases or hours. The system decrements the remaining quantity each time a service order covered by the agreement line is saved. If the service order is canceled, the system increments the remaining quantity. For support agreements, workflow processes must be implemented to update remaining quantity.

For more information about setting up workflow processes to manage remaining quantity on support agreements, see *Setting Up Component Event Processing* in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook*.

Entitlement Details

The **Entitlement Details** scroll area lists the entitlements that define the response time, restore time, service level, or coverage contractually owed to the customer as defined by the agreement line or the warranty.

Entitlement Name

The name of the entitlement.

Description

The description associated with entitlement at the time of definition on the Entitlements component.

Click **OK** or **Cancel** to return to the Service Order page or Case page.

Defining Workflow

Use PeopleSoft CRM workflow to access, monitor, and control workflow in your organization. PeopleSoft CRM workflow can control things such as how many actions are assigned to an event, the timing of these actions, who gets a notification or an entry in their worklist, and so on. A common workflow notification page enables your users to send email to interested parties, send reminders and notifications to groups of users, add new routings and escalations, and place workflow items such as action requests and notifications in group and individual worklists. A worklist functions like an email inbox, but differs significantly in the fact that you can perform work-related tasks such as designating a task as *worked* (or completed), reassigning a task, and so on.

PeopleSoft CRM workflow consists of tools to:

- Define how time-based workflow activities are performed.
- Add a common Send Notification page to your components so that you can set and route workflow.
- Display configurable worklist views.
- Define group worklists.
- Route worklist items and email.

Workflow notifications integrate people into your PeopleSoft CRM business processes and are the backbone of workflow. PeopleSoft CRM workflow uses the primary email address assigned to each user and delivers their email notifications to that address. It is very important to ensure that each user has a primary email address assigned to them. Additionally, workers who have a user ID in PeopleSoft CRM can receive worklist routings if the security administrator creates the correct security for their person IDs on the user profile page of the Maintain Security component.

Note. For worklist routings to be delivered to the worklist correctly, a person ID can be associated with only one user ID.

Defining Time-Based Workflow

Initially, you use PeopleSoft Application Designer to design and build your own business processes, including workflow rules. There are cases where you want to trigger events using batch processing rather than in response to a user action on a page. A common reason to do

this is if you are monitoring a database for certain conditions such as elapsed time: an invoice becomes overdue, an employee reaches his five-year anniversary, or a worklist entry remains unworked for over a week.

Although the batch programs perform simple tasks, they play an important role in workflow. By running predefined SQL programs on a regular basis, they periodically check your PeopleSoft database for data that is relevant to your business processes. By running appropriate PeopleCode, they enable the system to respond automatically.

The batch process breaks down into two parts. First, a batch program must capture the relevant condition—the overdue invoice, the five-year anniversary, or whatever conditions you're monitoring. Next, the batch program must cause the relevant TriggerBusinessEvent PeopleCode to execute.

PeopleSoft Application Engine works in conjunction with Component Interfaces to perform the batch processing. Application Engine programs capture the relevant conditions and then pass the results to a Component Interface, which then triggers the workflow PeopleCode.

For more information about using PeopleSoft Application Engine, Component Interfaces, and PeopleCode to trigger workflow, see PeopleSoft Workflow in the *PeopleTools Workflow PeopleBook*.

To create workflow actions:

1. Identify a condition in which you want a workflow notification or a process to run.

For example, a service order not started within an hour.
2. Identify an application component that can create this condition. Generate a component interface from this application component.
3. Build a workflow action definition using the Rule page.
4. Define a workflow action for notifications and processes using the Notifications and Processes pages.
5. Create PeopleCode in PeopleSoft Application Designer to call common PeopleCode functions in RB_WF_FUNCLIB to reference your workflow actions.

Use PeopleCode to initiate a workflow action based on the condition in step 1 and to implement the RunActionRoutes method of the Component Interface in step 2. The RunActionRoutes method must reevaluate the condition a second time and invoke the routings defined for this workflow action.

Note. Be sure to apply security to the Component Interface for all users who need to access the underlying component.

Creating Workflow Action Request Codes

Action request codes are text codes that describe actions that a user might be expected to take in response to an email or worklist entry. Action request codes appear on related worklist pages and email text, and are descriptions of logical tasks or actions that are recognized as standard business practices in your company.

For more information about action request codes, see *Using Worklists and Notifications*.

Action Request Page

Usage	Use the Action Request page to create action request codes for your users.
Object Name	RB_ACT_RQST
Navigation	Define Business Rules, Define Workflow, Setup, Action Request Codes
Access Requirements	None

Action Request page

Action Request Freeflow text describing the action that a recipient must take.

Understanding Workflow Actions

Workflow actions enable you to define notifications and processes under which the system triggers a future workflow event. Workflow actions control how many actions are assigned to an event, the timing of those actions, or who receives a notification or entry in their worklist. For example, you can create an action called Case Unassigned that will create and route a case notification that has been unassigned for a specified period of time. Because the notification is automatic, the possibility of a communication breakdown is diminished. This notification can be immediate or delayed.

You can also use notification rules to automatically launch a process on the server. For example, you can create a notification rule that raises the priority level of a case if it is not resolved within a given amount of time.

Workflow actions work in conjunction with component interfaces. Each component interface must contain a method called Run Action Routes, which reevaluates workflow conditions at a later time to send a routing.

For more information about using PeopleSoft Application Engine to trigger business events, see PeopleSoft Workflow in the *PeopleTools Workflow PeopleBook*.

Rule Page

Usage	Use the Rule page to define conditions under which activities, events, and routings occur.
Object Name	RB_WF_RULE
Navigation	Define Business Rules, Define Workflow, Setup, Workflow Action Rule, Rule
Access Requirements	Enter a rule name.

The screenshot shows the 'Rule' page in the PeopleSoft interface. At the top, there are three tabs: 'Rule', 'Processes', and 'Notifications'. The 'Rule' tab is selected. Below the tabs, the 'Rule Name' field contains 'Send Transaction Details' and the 'Active Flag' checkbox is checked. The 'Description' field contains 'Paid by credit card, send transaction details'. Below this is a section titled 'Note to Send with Action' which contains two input fields: 'Message Set Number' and 'Message Number'. Further down are fields for 'Component Interface Name' and 'Run Control Record', both with search icons. At the bottom is a large 'Comment' text area.

Rule page

The system displays the **Rule Name** that you entered to access the page. The rule name is the condition that you are monitoring, not the event itself.

Active Flag Select this check box to enable a workflow action.

Description Freeform text that describes the notification rule.

Note to Send With Action

Use this group box to specify which predefined message you are sending with the notification rule. Messages are stored in the Message Catalog and organized by message set number. Each message set consists of a category of messages identified by individual message numbers.

Message Set Number	The number that identifies the message set.
Message Number	The number that identifies the specific message in the message set.

Component Interface/Run Control

Use the Component Interface/Run Control region of the page to enter information about which Component Interface triggers the event and which run control to use.

Component Interface Name	Select the name of the Component Interface that you want to use to trigger the event.
Run Control Record	The run control that will be passed to Process Scheduler when you schedule the process.
Comment	A description or comment about the purpose of this action rule.

Processes Page

Usage	Use the Processes page to select the processes by which workflow is triggered.
Object Name	RB_WF_RULE_PRCS
Navigation	Define Business Rules, Define Workflow, Setup, Workflow Action Rule, Processes
Access Requirements	Enter a rule name.

Schedule Number	Process Type	Process Name	Description	Delay Minutes	Repeat Minutes
1	Application Engine	RC_WF_TEST	RC_WF_TESTER	2	

Processes page

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

Schedule Number	The order that the processes will be run, if you have more than one process per workflow rule.
Process Type	Select a process type that will trigger the workflow action.
Process Name	Select the name of the process that you want to use. These are processes that are created specifically for workflow.
Description	A summary of the process name.

Delay Minutes

The amount of time that can pass before the action request is triggered.

Repeat Minutes

The amount of time that can pass before the action request is sent again. The message will be repeated until the conditions that triggered the workflow action are no longer true.

Notifications Page

Usage	Use the Workflow Action Rule - Notifications page to define workflow notifications.
Object Name	RB_WF_RULE_RTES
Navigation	Define Business Rules, Define Workflow, Setup, Workflow Action Rule, Notifications
Access Requirements	Enter a rule name.

Workflow Action Rule - Notifications page

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

Schedule Number

The order that the processes will be run, if you have more than one process per workflow rule.

Role Name

Enter the name of the role that receives the workflow notification. This name is used for the role query.

Role binds

Click this button to enter role binds for the work item.

Business Process Name

Select the name of the business process associated with this rule.

Activity Name

Select the name of the activity that you are associating with this rule. An activity displays the steps (which correspond either to application pages or to external programs) that comprise a complete activity within a business process.

Event Name

Select the name of the event that you are associating with this rule. Events represent specific transactions that can occur on the page associated with the event.

Default Delay (Min)
(minutes)

The amount of time that can pass before the action request is triggered. If this field is clear, the action executes immediately upon saving the page.

Default Repeat Times

The number of times that a message is repeated. The message will be repeated until the conditions that triggered the workflow action are no longer true.

Binds Required Page

Usage	Use the Binds Required page to specify the value that the variable should take in the query for each work item.
Object Name	RB_WF_RULE_BIND
Navigation	Click the Role binds button on the Workflow Action Rule - Notifications page.
Access Requirements	None

Binds Required

Field Name	Record (Table) Name	Field Name	Bind Constant
1 CASE_ID	<input type="text"/>	<input type="text"/>	<input type="text"/>
2 BUSINESS_UNIT	<input type="text"/>	<input type="text"/>	<input type="text"/>

First 1-2 of 2 Last

OK Cancel

Binds Required page**Field Name**

The field name for the query.

Record (Table) Name

This column lists the record definitions associated with the component that triggers this routing.

Field Name

To bind a variable with the value from a record field, select the field, select the bind variable that you want to provide a value for, then select the record field to contain the value.

Bind Constant

To bind a variable with a constant, enter a value in this field.

Using the Worklist Display Component

The Worklist Display Component page enables you to associate a component with a worklist and create views that group the notifications by the referenced component. In both group and individual worklists, notifications are organized into different views according to the component that they are associated with. For example, notifications that are related to service orders are in a group, notifications for support are in a group, and so on.

To set up these views for your worklists, first create a worklist record name in PeopleSoft Application Designer. After you have created the worklist record name, associate it with the component name using the Worklist Display Component page.

For more information about creating worklist record names, see Application Designer in the *PeopleTools Application Designer PeopleBook*.

Worklist Display Component Page

Usage	Use the Worklist Display Component page to associate an activity and an event name to a worklist.
Object Name	RB_WF_WLPNG_DFN
Navigation	Define Business Rules, Define Workflow, Setup, Worklist Display Component
Access Requirements	Enter a component name.

Worklist Display Component

Component Name: RC_WF_CASE_WL

Worklist Record Name: RC_CASE_WL

Worklist Display Component page

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

Worklist Record Name The name of the worklist record that you created in PeopleSoft Application Designer.

Setting PeopleSoft CRM Workflow Defaults

In some instances, you might want to have a separate Process Scheduler server to run your time-based workflow processes on. You can set up a server specifically for workflow-related processes.

CRM Workflow Defaults Page

Usage	Use the CRM Workflow Defaults page to set up a Process Scheduler server for workflow.
Object Name	RB_WF_DEFAULTS

Navigation	Define Business Rules, Define General Options, Use R-Z, Workflow CRM Defaults
Access Requirements	None

CRM Workflow Defaults page

Server Name	The Process Scheduler server where you want the time-based processes and notifications to run.
Process Dir (process directory)	The directory for the error output of the time-based workflow if an error occurs.
Symbolic Id	The symbolic ID is associated with a user's encrypted access ID and access password. The correct symbolic ID must be entered in order to retrieve the appropriate access ID and password for signon.

Setting Up a Group Worklist

To enable group worklists, you must associate individual user IDs with groups that you've defined as logical classifications of users. Group worklists can be based on job function, location, or any other distinction that helps to distribute notifications among your workers.

Group Worklist Setup Page

Usage	Use the Group Worklist setup page to set up a group worklist.
Object Name	RB_WF_WL_GRP
Navigation	Define Business Rules, Define Workflow, Setup, Group Worklist
Access Requirements	Enter a group worklist name.

Group Worklist

Group Worklist Name: AtlantaEmail

Description: Atlanta Email Support

User ID	Description
1 CC587	Perry,David L

First 1 of 1 Last

+

-

Group Worklist setup page

The **Group Worklist Name** that you entered to access the page appears as well as its **Description**.

User ID Select a user ID for the individual that you are adding to this group.

Description The identifier for the user ID.

Email Considerations

Workflow notifications can be sent either through the normal workflow process of using your company's email system. Error messages for failed email will not necessarily show up when you send a notification if your SMTP server is down or if the email address is not verifiable by the PeopleSoft system.

Defining Branch Scripts

Scripts are standardized sets of questions that you can ask your customers. The scripts that you create in PeopleSoft CRM are *branch scripts*; that is, you can incorporate logic into the script so that the answer to a question determines what happens next.

In PeopleSoft CRM, you can create scripts to use as surveys, as problem solving techniques, and as upsell scripts (to determine when a customer should upgrade to a newer version of a product). The process for creating the script is always the same, regardless of the purpose of the script you're creating.

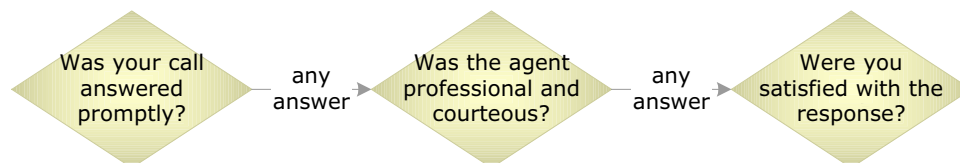
This chapter explains how to create content for branch scripts. **For more information** about running branch scripts, see Running Branch Scripts in the chapter "Using PeopleSoft CRM Common Elements"

Overview of Branch Scripts

This section describes branch scripts and how they're used in PeopleSoft CRM applications.

What is a Branch Script?

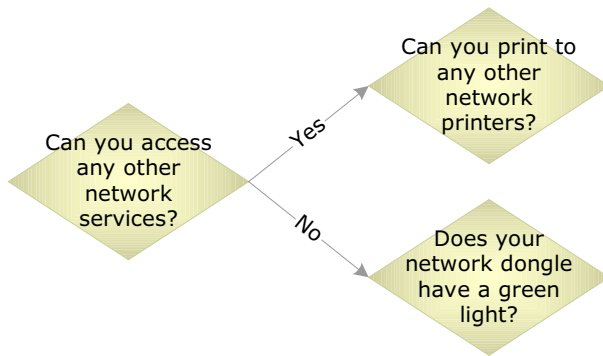
A script is predefined set of questions or statements joined together in a specific order. When you run the script, you ask the questions and record the answers. Each question or statement in the script is called a *node*.



Simple branch script

Although this script doesn't incorporate branching, PeopleSoft still considers it to be a branch script, albeit a branch script with just a single branch.

To build a script with branches, you incorporate conditional logic that associates the different answers to a question with different follow-up questions. You establish this branching structure using PeopleSoft Tree Manager.



Branch script with conditional logic

Understanding Script Types

All branch scripts have a *script type* that classifies the script according to its business purpose. There are three types of scripts you can create:

Surveys are general-purpose scripts used for gathering information from your customers. You can start surveys from the following pages:

- In PeopleSoft CRM Support and PeopleSoft CRM HelpDesk, you can start surveys from the Related Objects page.
- In PeopleSoft CRM Sales, you can start surveys from the Sales Lead Details page.
- In PeopleSoft CRM Marketing, you can associate surveys with a wave in the Wave Detail page. Although you can't run surveys in PeopleSoft CRM Marketing, the surveys associated with a wave can be used in the PeopleSoft CRM Sales.

Problem solving techniques are troubleshooting scripts used to help solve cases in PeopleSoft CRM Support and PeopleSoft CRM HelpDesk. Call center agents access problem solving techniques from the Related Objects page or from Solution Advisor.

Upsell scripts help you determine if a customer should be advised to upgrade to a newer product. The scripts are always associated with specific products. Your organization can set up workflow to display a flashing icon on the Case page when there is a relevant upsell script. When agents see the flashing icon, they need to go to the Related Objects page to launch the script.

Understanding Node Types

You create nodes in the Branch Script Node Definition page. When you create a node, you must specify a node type. There are three types of nodes you can use:

- Normal nodes

Normal nodes require the respondent to select only one answer. For example, if you ask whether the respondent has ever used your products, the respondent must select a single answer. Therefore you would use a normal node to ask this question.

The valid answers to a normal node are not part of that node. Instead, you establish valid answers in the follow-up nodes; you create one follow-up node for each valid answer. This architecture means that a normal node that follows another normal node includes the answer to the *previous* question.

When you set up your branching structure using PeopleSoft Tree Manager, the association between a normal node and its child nodes is used to generate both the list of valid answers and the logic that directs a questioner to the appropriate child node depending on the answer.

- Root nodes

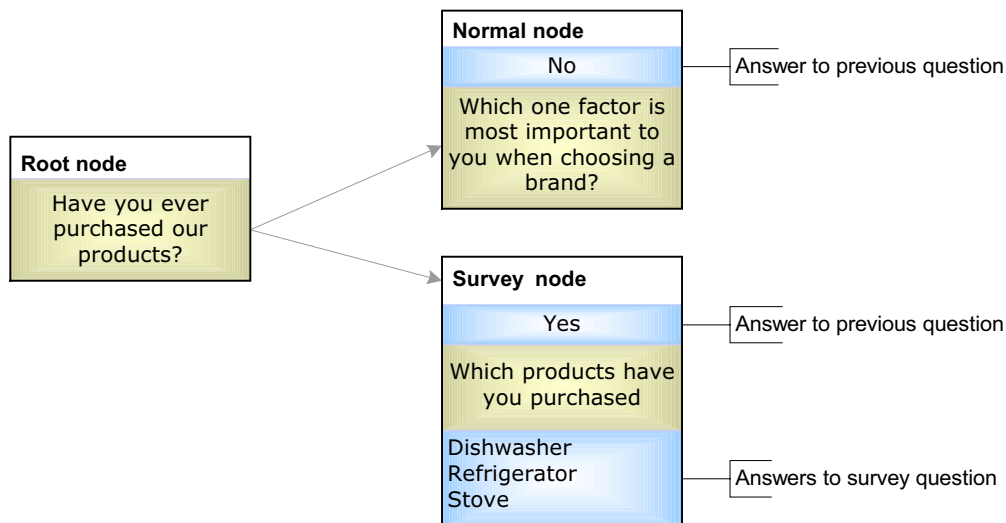
A root node is a normal node used as the first node in a script. Because it is the first node in the script, it is not a response to any other question. Therefore, when you create a root node, you don't specify the answer to the previous question.

- Survey nodes

Survey nodes accept more than one answer for a single question. For example, if you ask which of your products a respondent has used, the respondent can select several answers. Therefore you would use a survey node to ask this question.

When you use a survey node, you cannot set up answer-dependent logic. There is only one possible follow-up question, and it appears regardless of the respondent's answer. The follow-up question can be either a normal node or another survey node.

The following diagram illustrates the different types of nodes and the answer text associated with each type.



Answer text in script nodes

In the scenario illustrated, the normal node is followed by one node for each possible answer. The survey node, on the other hand, would be followed by only one node (a normal node or another survey node) with a follow-up question that isn't dependent on the respondent's answer.

Understanding Actions

PeopleSoft gives you the option of associating one or more actions with any node in the script. As the script runs (in the Branch Script Execution page), the questioner sees the available actions and can initiate an action by clicking a button on the survey page.

You define actions in the Branch Script Node Definition page by selecting an action type and entering parameters specific to that action type.

There are two types of actions that you can set up. These actions are designed specifically for use with problem solving techniques in PeopleSoft CRM Support and PeopleSoft CRM HelpDesk:

- You can transfer to the RC_USE_SOLUTION page for a specified solution. From this page, the user can review the solution and click a button to bring the solution back to the case from which the script was launched.

To set up this action, you specify an action type of *Transfer* and you enter information about the page to which you're transferring and the data to be displayed in the page.

- You can use a component interface method to update the case status—for example, to close a case based on the respondent's answers.

To set up this action, you specify an action type of *Method* and you enter information about the component interface, the method, and the status to be assigned to the case.

A third type of action, *Return*, is also available in the Branch Script Node Definition page. This action returns a value to global memory, where the originating component can then retrieve the value. The component that is expecting a returned value must have special processing to handle the value—for example, to move the value into an appropriate field. This action is not currently supported by any PeopleSoft CRM components.

Note. In order to set up actions, you will need to be familiar with PeopleTools object names and other technical aspect of your system.

Assigning Scores to Script Responses

PeopleSoft enables you to establish a scoring system that you can use to assign a numerical rating to a set of script responses. For example, if you have a script that you use to quality sales leads, the final score can tell you whether the lead is hot, warm, or cold. If you associate scores with a customer satisfaction survey, the final score represents the overall satisfaction level and is available for reporting and trend analysis.

When you set up a branch script node, you can set the score for each possible answer.

- Answers to normal nodes (including root nodes) are entered into the response nodes. Scores are associated with answers and therefore are also in the response nodes.
- Answers to survey nodes are entered into the survey node. Respondents can choose more than one answer. The score for a survey node is the sum of the scores of all answers that the respondent chooses. For example, if there are five possible answers, each with a score of two, then a respondent who chooses three of the five answers receives a score of six.

You can also assign a weight to a question. The weight is used to determine a factor that gets applied to the score. The factor is based on the weight of the question divided by the total weight of all questions that are answered.

For example, consider a script where the respondent answers six questions. Three questions have a weight of 1, two have a weight of 2, and one has a weight of 3. The total of all the weights is 10 ($1+1+1+2+2+3$). Therefore, the score for each of the questions with a weight of 1 will be multiplied by $1/10$. The score of each of the questions with a weight of 2 will be multiplied by $2/10$. And the score of the question with a weight of 3 will be multiplied by $3/10$.

This example is illustrated in the following table. The score for the entire survey is the sum of the weighted scores for all questions that the respondent answers.

Question Weight	Weighting Factor	Answer Score	Weighted Score
1	1/10	10	1
1	1/10	10	1
1	1/10	20	2
2	2/10	20	2
2	2/10	30	6
3	3/10	30	9
Total Weight: 10			Total Score: 21

Understanding Persistent Scripts

In addition to classifying scripts according to their usage, you also classify scripts according to whether they are *persistent* or *disposable*.

When you run a persistent script, the system saves the respondent's answers. Persistent scripts are used to collect data that you may need to analyze or refer to later on. For example, you probably want to store a respondent's answers to all the questions in a problem solving script because the information may be valuable as you continue to work on the case.

When you run a disposable script, the system does not save the answers. Typically the last node in a disposable script includes an action that stores a final result in the database.

Disposable scripts are used when you don't need to save the information that led you to the final result—you only need to perform an action based on that final result. For example, if you ask a customer a series of questions to determine which of your products will meet that customer's needs, you may not need to store the answers to those questions as long as you store the final product information.

Select the Persistent check box on the Branch Script Definition page if you want the system to save the respondent's answers. Leave the check box clear if the answers are disposable.

Understanding Script Validation

Creating a branch script involves setting up numerous nodes and then using PeopleSoft Tree Manager to structure the nodes into a script. Because you do this in two separate stages, the Branch Script Node Definition page cannot enforce rules that have to do with how the node fits into the overall script. Instead, the Branch Script Definition component provides a validation mechanism to enforce these rules.

You cannot use a script until it passes the validation process. If you make changes to the script structure or to any of the script nodes after the script has already been validated, remember to revalidate the script.

Required Validation Checks

There are certain things the validation process always checks. If there are any errors in the required checks, the script is not considered valid and you will not be able to run it. The following table lists the required validation checks:

Error Reported	Description and Instructions for Fixing
Question without answers	<p>Every normal node that has question text must have at least one child node. If it doesn't have any child nodes, then the question doesn't have any answers.</p> <p>To correct this error, either create child nodes with the answers to the question, or, if the question does not have any answers (that is, this is the final node in the script) move the question text to the Guide Text field.</p>
The parent node must have question text.	<p>If a node has an answer to the previous question, the previous node must have a question.</p> <p>To correct this error, either enter a question in the parent node, delete the answer text in the current node, or change the relationship between the nodes.</p>
A problem solving technique script can not have a survey node	<p>If the script type is <i>Problem Solving Technique</i>, then survey nodes are not permitted.</p> <p>To correct this error, restructure the survey node as a normal node, and set up child nodes for each possible answer to the question</p>

Error Reported	Description and Instructions for Fixing
This survey node has more than one child	<p>Survey nodes can only have one child node. This is because the answers to survey nodes are in the survey node, not in the child node, and the system does not have a mechanism for associating specific answers with different children.</p> <p>To correct this error, delete all but one of the survey node's children.</p>

Optional Validation Checks

In a branch script, a *leaf* is the terminal node at the end of a branch. These nodes are extremely important because they represent the final step of the script—the step where it's likely that you need to perform an action as a result of the information that you've gathered. It's often a good idea for such nodes to include guide text that helps the questioner decide which actions, if any, to initiate.

If you want an overview of how you've set up your leaf nodes, you can configure the validation process to check for several conditions. You're not required to validate your leaf nodes, but leaf node validation can be a useful way to verify the design of your script.

You can configure the validation process to report exceptions to the following conditions:

- Every leaf node has an action
- Every leaf node has guide text
- Every leaf node has both an action and guide text.

Exceptions to these conditions do not prevent the system from marking the script valid.

Creating Branch Scripts

To create a branch script:

1. Design the script.

The most effective design documents will show the entire branching structure of the script, either in a flowchart diagram or in outline format.

2. Create individual nodes on the Branch Script Node Definition page.

On the Branch Script Node page, you define all the elements within a single node: the answer to the previous question, the question, any survey answers, and any actions that are to be available from that node.

You can skip this step if you prefer to define the nodes at the same time as you build the branch script structure in PeopleSoft Tree Manager. When creating complex scripts based on design documents with complete specifications for each node, it's usually easiest to

create the nodes all at once on the Branch Script Node Definition page. If you're creating a simple script, you may prefer to define the nodes as you build the structure.

3. Create the branch script structure using PeopleSoft Tree Manager.

PeopleSoft Tree Manager provides you with a graphical representation of hierarchical structures. You use Tree Manager to define the relationships among the individual nodes in a branch script.

As long as you've created the individual nodes ahead of time, all you need to do is assemble the nodes into their branching structure. If you skipped step 2, you also need to define the nodes as you build the structure.

4. Specify the script type and add descriptive information on the Branch Script Definition page.

The script type controls access to the script from the transactional pages where the script is invoked. Any page that invokes a script only invokes scripts of the appropriate type.

Solution Advisor uses descriptive information about the script to find scripts that meet its search criteria.

5. Select validation options and validate the script on the Branch Script Validation page.

6. Test the script.

Branch Script Node Definition Page

Usage	Use the Branch Script Node Definition page to create the individual nodes that together make up a script.
Object Name	RC_BSCRIPT_PNL
Navigation	<p>Define Business Rules, Structure Process Automation, Setup, Branch Script Node Definition</p> <p>You can also access individual node definitions from pages that display the tree that represents the entire script:</p> <ul style="list-style-type: none"> • Click any node name in a Tree Manager tree. • Click any node name on the Branch Script Definition page.
Prerequisites	If you want to set up an action that relies on a component interface, you must first create the component interface.
Access Requirements	Enter a tree node.

Branch Script Node Definition	
Node Header	
Tree Node: CRM01_DW_7	*Node Type: Normal
Detail Information	
*Description: No, it's not latched	
Answer for Previous Question: No	Score:
Question:	Weight:
Guide: Latch the door.	
Define Action(s) View All First 1 of 1 Last	
*Description: Add solution info to case	*Action Type: Transfer Delete Node Action
Transferred Information	
Menu Name: CALLCENTER	Menu Bar Name: INQUIRE
Item Name: SOLUTION	Page Name: RC_USE_SOLUTION Search Rec: RC_USE_SOLN.Y
Define Action Parameter(s) View All First 1 of 1 Last	
Name: SOLUTION_ID	Type: Number Value: 9 + -
Add Node Action	
Last Modified: 04/01/2001 3:03PM PDT DVP1	

Branch Script Node Definition page

Node Header**Tree Node**

The unique identifier for this node. You reference this ID when you add this node to a branch script in PeopleSoft Tree Manager.

Node Type

Indicates where this node fits into the script. If this node is the first node in a script, select **Root Node**. Otherwise, decide whether this is a **Normal Node** or a **Survey Node**.

Detail Information**Description**

A short phrase to help you identify the node. When you set up the tree for a script, this description text appears in the tree.

Answer For Previous Question

The answer to the previous node in the script which brings the user to this node. This field does not appear if this is a root node.

If the previous node in the script is a survey node (which permits the respondent to choose more than one answer), then the current node is valid for any combination of answers. Therefore, don't enter a value in this field when the previous node is a survey node.

Score

The score associated with this answer. Note that the score, like the answer, is associated with the previous questions.

Question	<p>The question to be answered by the script respondent. If you enter a question, there must be answers. Use the Guide field instead of the Question field if you want to enter instructions that you want the respondent to follow, or a general statement such as "Thank you for your time."</p> <p>Consider phrasing both question and guide text so that they are addressed directly to the respondent. For example, "Can you access the network?" is better than "Can the customer access the network?" because the first phrasing enables a questioner to read the text directly from the script.</p>
Weight	<p>The weight given to this question for scoring purposes. The weight is the numerator of a factor that gets applied to the score once the respondent answers the question. The denominator of the factor is the sum of the weight of all questions that the respondent answers.</p>
Guide	<p>Additional text to help either the questioner or the respondent understand and answer the question. For example, if the question is whether the respondent has access to other network services, the guide text may explain how to determine whether other network services are available.</p>

Define Actions

For more information about actions in branch scripts, see Understanding Actions in this chapter.

Description	<p>A short phrase used to identify the action. When a questioner runs a script, this is the text that the questioner will see on the button used to initiate the action.</p>
Action Type	<p>The type of action that you're establishing.</p> <p>Select <i>Transfer</i> for an action that transfers the user to the RC_USE_SOLUTION page, where the user can review the solution and click a button to bring the solution back to the case.</p> <p>Select <i>Method</i> for an action that uses a component interface method to update the case status—for example, to close a case based on the respondent's answers.</p>

The third value, ***Returned***, returns a value to global memory, where the originating component can then retrieve the value. The component that is expecting a returned value must have special processing to handle the value—for example, to move the value into an appropriate field. This action is not currently supported by any PeopleSoft CRM components.

Delete Node Action Click this button to delete the current action.

Transferred Information

The following fields appear only if the action type is ***Transfer***. They determine the location of the page to which you are transferring. Enter the specified values to transfer to the RC_USE SOLUTION page (which is in a hidden component).

Menu Name	The object name of the menu where the page is located. To transfer to the RC_USE SOLUTION page, enter <i>CALLCENTER</i> .
Menu Bar Name	The object name of the menu bar where the page is located. To transfer to the RC_USE SOLUTION page, enter <i>INQUIRE</i> .
Item Name	The object name of the component that the page is in. To transfer to the RC_USE SOLUTION page, enter <i>SOLUTION</i> .
Page Name	The object name of the page that you want to transfer to. To transfer to the RC_USE SOLUTION page, enter <i>RC_USE_SOLUTION</i> .
Search Rec (search record)	The search record used when the page is accessed through the specified menu path. To transfer to the RC_USE SOLUTION page, enter <i>RC_USE_SOLN_VW</i> .

Component Interface Details

The following fields appear only if the action type is ***Method***. They determine which component interface method to use. Enter the specified values to invoke the desired method.

Component Interface Name	<p>The name of the component interface to be invoked. To use the component interfaces delivered by PeopleSoft, enter <i>RC_CASE_SW_CI</i> (for PeopleSoft CRM Support cases) or <i>RC_CASE_SW_CI</i> (for PeopleSoft CRM HelpDesk cases).</p> <p>To make the action available in both support cases and helpdesk cases, you must set up two separate actions. When you run a script, the system checks whether the originating case is a support case or a helpdesk case and shows only the appropriate actions.</p>
---------------------------------	--

Method

The name of the method to be used when the specified component interface is invoked. For example, you can use the `SetCaseStatustoResolved` method to change the case status to the default resolved status defined for the business unit.

Define Action Parameter(s)

The following fields are valid for all three types of actions.

Name

If the action type is **Transfer**, enter the name of the field that the transfer function uses to uniquely identify the data to display. To display the `RC_USE_SOLUTION` page, you need to pass a solution ID, so enter ***SOLUTION_ID***.

If the action type is **Method**, and you're using the component interface method that updates the case status, enter ***RC_STATUS*** (the name of the case status field).

If the action type is **Returned**, enter the name of the global variable to which you are returning data.

Type

Specify the type of value stored in the **Name** field: a **Character**, **Number**, or **Date**.

If the **Name** is ***SOLUTION_ID***, select **Number**.

If the **Name** is ***RC_STATUS***, select **Character**.

Value

If the **Action Type** is **Transfer**, and you're transferring the user to the `RC_USE_SOLUTION` page, enter the solution ID for the solution that is to be transferred to the case.

If the **Action Type** is **Method**, and you're using the component interface method that closes the case, enter the status code to be assigned to the case.

If the **Action Type** is **Returned**, enter the value that will be returned.

Creating Branch Scripts in PeopleSoft Tree Manager

Once you've defined the nodes that you'll use in your script, use PeopleSoft Tree Manager to structure the script.

Note. To structure a branch script, you must be familiar with PeopleSoft Tree Manager. This chapter does not describe how to use Tree Manager.

For more information about using PeopleSoft Tree Manager to create trees and tree nodes, see the Tree Manager PeopleBook.

To create a script using PeopleSoft Tree Manager:

1. Select PeopleTools, Tree Manager, Use, Tree Manager.
2. Create a new tree.

On the Add page, enter a **Tree Name** and click **Add**. The Tree Definition and Properties page appears.

3. Enter the tree properties.
 - a. Select **BRANCH_SCRIPT** as the Structure ID.
 - b. Enter a Description.
 - c. Enter an Effective Date and Status.
 - d. Select **BRANCH SCRIPTS** as the Category.
 - e. Select **Level Not Used** in the Use of Levels field.
 - f. Leave both **Audits** check boxes clear.

4. Click **OK**.

The Enter Root Node for Tree page appears.

5. Define the root node.

In the **Tree Node** field, identify the script's root node (the first node in the script).

Only nodes that have been identified as root nodes are available. If you can't find the node that you're looking for, return to the Branch Script Node page and check the Type field to make sure the node is a root node.

6. Click Save.

The Tree Manager page appears. At this point, the tree includes only the root node.

7. Add all other nodes.

Trees offer a visual representation of the branching structures inherent in branch scripts. Each node of the script is also a node on the tree. To build your complete tree, add all of the individual nodes to the tree, placing each node so that the final tree hierarchy mirrors that of the script you're creating.

As long as you've created the individual nodes ahead of time, all you need to do is assemble the nodes into their branching structure. If you haven't yet defined the nodes, you can so do within PeopleSoft Tree Manager.

8. Save the tree.

Categorizing and Validating Branch Scripts

Use the Branch Script Definition component to add general information about a script and to validate the script.

Branch Script Definition Page

Usage	Use the Branch Script Definition page to add general information about a script, including
Object Name	RC_BRSCR_DEFN_PNL
Navigation	Define Business Rules, Structure Process Automation, Setup, Branch Script Definition
Prerequisites	Create the branch script in PeopleSoft Tree Manager.
Access Requirements	Enter a branch script ID and a setID. The branch script ID is the name you gave the tree in PeopleSoft Tree Manager.

Branch Script Definition		Branch Script Validation																	
Branch Script Information SetID: CRM01 Branch Script ID: CC_SERVICE_SURVEY Effective Date: 01/01/2000 <input checked="" type="checkbox"/> Persistent <input checked="" type="checkbox"/> Valid																			
Branch Script Structure First Previous Next Last Left Right SURVEY_SERVICE_1 - How was your Service today? SURVEY_SERVICE_4 - Fair SURVEY_SERVICE_3 - Bad SURVEY_SERVICE_2 - Good		Descriptions and Comments *Description: <input type="text" value="Call Center Service Survey"/> *Script Type: <input type="text" value="Survey"/> Comment: <div style="border: 1px solid gray; height: 100px;"></div>																	
		Default Rating <table border="1"> <thead> <tr> <th>Score Limit</th> <th>Range Value</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td><input type="text" value="0.00"/></td> <td><input type="text" value="Not Satisfied"/></td> <td><input type="button" value="+"/></td> <td><input type="button" value="-"/></td> </tr> <tr> <td><input type="text" value="5.00"/></td> <td><input type="text" value="Somewhat Satisfied"/></td> <td><input type="button" value="+"/></td> <td><input type="button" value="-"/></td> </tr> <tr> <td><input type="text" value="10.00"/></td> <td><input type="text" value="Satisfied"/></td> <td><input type="button" value="+"/></td> <td><input type="button" value="-"/></td> </tr> </tbody> </table>		Score Limit	Range Value			<input type="text" value="0.00"/>	<input type="text" value="Not Satisfied"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="text" value="5.00"/>	<input type="text" value="Somewhat Satisfied"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="text" value="10.00"/>	<input type="text" value="Satisfied"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
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Branch Script Definition page

Branch Script ID

The unique identifier for the script.

Effective Date

Because trees are effective-dated, you cannot create or update the current script definition unless you are in Correct History mode. As with all effective-dated data, you can update future-dated data in any mode.

SetID

The setID determines which business units have access to this script.

Persistent	Select this check box if you want the system to save the respondent's answers when you run the script. Leave this check box clear if you don't need to save the answers.
Valid	Indicates whether the script has passed the script validation process that you run from the Branch Script Validation page in this component.

Branch Script Structure

The **Branch Script Structure** group box displays the tree as you defined it in PeopleSoft Tree Manager. Each node is identified by the ID and description established on the Branch Script Node Definition page. You cannot modify the structure in the page; you must use Tree Manager to modify the structure.

Each node name is a link; click the link to display the Branch Script Node Definition page. When you access the Branch Script Node Definition page this way, the following buttons are available:

- Click Apply to save changes to the node definition without leaving the Branch Script Node Definition page.
- Click OK to save any changes to the node definition and return to the Branch Script Definition page.
- Click Cancel to discard any changes to the node definition and return to the Branch Script Definition page.

Descriptions and Comments

Description	A text description of the script.
Script Type	<p>The business purpose of the script. When a user invokes a script from a particular page, the system displays only scripts of the type appropriate for that page. Select one of the following valid values:</p> <p><i>PST</i> (problem solving technique): a troubleshooting script used to help solve call center cases.</p> <p><i>Upsell</i>: a script that determines if a customer should be advised to upgrade to a newer product. Upsell scripts are always associated with specific products.</p> <p><i>Survey</i>: a general-purpose script used for gathering information from your customers.</p> <p>For more information about script types, see Understanding Script Types in this chapter.</p>
Comment	A long text description of the script.

Default Rating

If you're scoring survey answers, you can associate a rating with the final script score (the sum or the weighted scores for each question answered).

Scoring Limit

Enter the minimum score associated with the scoring range. Enter **0** as the scoring limit for the lowest rating.

Range Value

Associate a meaning with the range. Values appropriate for lead qualification surveys are **Hot, Medium, and Cold**. Values appropriate for customer satisfaction surveys are **Somewhat, Satisfied, and Very Satisfied**.

Test Branch Script**Test Branch Script**

Click this button to open the script in the Branch Script Execution page, where you can test the script in its normal runtime environment.

Branch Script Validation Page

Usage	Use the Branch Script Validation page to validate that a script meets requirements that you specify.
Object Name	RC_VALIDATE_PNL
Navigation	Define Business Rules, Structure Process Automation, Setup, Event Definition
Prerequisites	Create the branch script in PeopleSoft Tree Manager.
Access Requirements	Enter a branch script ID and effective date.

Branch Script Validation page**Valid**

If this check box is selected, the script has passed the validation process. You cannot run the script until it is marked valid.

Required Checks

This check box is always selected, forcing you to run the required checks every time that you validate the script.

Leaf node has an action	If you select this check box, the validation process verifies that all leaf nodes include at least one action. When you validate the script, the Script Errors page displays all leafs that do not have at least one action.
Leaf node has a guide text	If you select this check box, the validation process verifies that all leaf nodes include guide text. When you validate the script, the Script Errors page displays all leafs that do not have guide text.
Leaf has action and action	If you select this check box, the validation process verifies that all leaf nodes include both guide text and at least one action. When you validate the script, the Script Errors page displays all leafs that fail either of these conditions.
Validate Script	<p>Click this button to perform the specified checks on the branch script. If the validation is successful, the system displays a message confirming that the script is valid.</p> <p>If the validation is not successful, the system displays the Script Errors page, where you can review all the errors found by the validation process.</p> <p>If you make changes to the script structure or to any of the script nodes after the script has already been validated, remember to revalidate the script to prevent problems when you run the script.</p>

Script Errors Page

Usage	Use the Script Errors page to view errors found by the validation process on the Branch Script Validation page.
Object Name	RC_ERRORS_PNL
Navigation	Click the Validate Script button on the Branch Script Validation page.

Branch Script Information

Branch Script ID: COMPUTER_1
Effective Date: 01/01/2000
☐ Valid

Your Script has the following problems

Required Check Result		
Tree Node	Detail	Problem
CRM02_COM_3	Detail	Question without answers

Additional Check Result		
Tree Node	Detail	Problem
CRM02_COM_5	Detail	This leaf node has guide text, but not action
CRM02_COM_3	Detail	This leaf node doesn't Guide Text neither Action

OK

Script Errors page

The **Required Check Result** grid lists errors found by the required checks. The **Additional Check Result** grid lists nodes that failed to meet the leaf node validation criteria that you

specified on the Branch Script Validation page. Within each grid, the following fields describe the error.

Tree Node	The unique ID of a node where the error was found.
Detail	Click this link to view and update node details.
Problem	A description of the error. For more information about validation errors, Understanding Script Validation in this chapter.
OK	Click this button to close the Script Errors page and return to the Branch Script Validation page.

Configuring CTI Application Pages

PeopleSoft CRM provides tools to deploy computer/telephony integration (CTI) features including screen-based call management and prepopulated application pages derived from parameters passed from your Genesys telephony server. Using this integration, an incoming phone call can launch a target application page on any available workstation and populate the fields on the page with information that the caller enters using an IVR (interactive voice response) interface. Using these tools, you can integrate with any PeopleSoft application.

PeopleSoft's CTI system works together with the IVR system, the Genesys CTI Framework, an automatic call distributor (ACD), and your PeopleSoft application. When a customer calls, the caller enters information using the IVR system. The PBX/ACD system then routes the call to the Genesys T-Server. The T-Server converts the customer's entries into key fields and communicates them to the PeopleSoft CTI application to open the relevant customer record and PeopleSoft transaction page that you've targeted using the CTI Page Configurator.

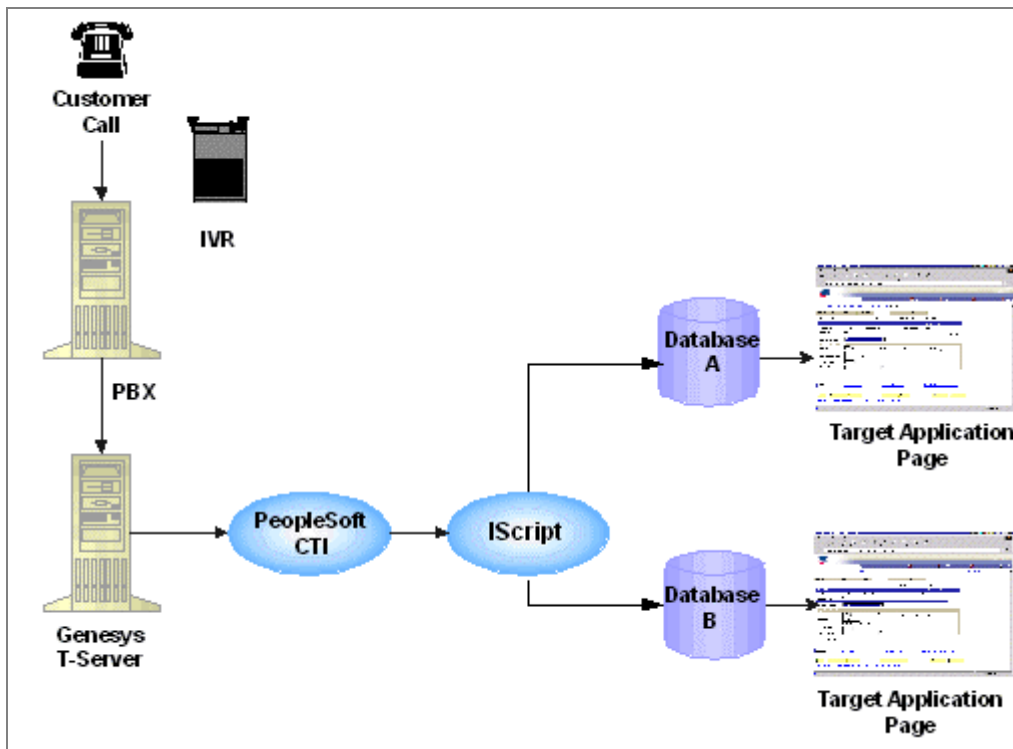
For more information about PeopleSoft CTI, see the *PeopleTools CTI PeopleBook*.

Using the CTI Page Configurator, you establish one-way communication between the Genesys telephony server and a PeopleSoft application page in a browser. PeopleSoft CTI communicates to the telephony server and, when calls are routed to the application, alerts the call taker and starts a browser session, accessing the appropriate record in the PeopleSoft application.

Overview of CTI Page Configurator

The PeopleSoft CTI solution minimizes the amount of time that a call center agent spends searching for and entering customer information. When a customer calls, specific customer data is collected by the IVR system and the captured data is routed to an application page in a call taker's browser. In the system, the CTI Transfer page takes the key information from the call and routes to the application page that has been designated as the target page for each CTI transaction.

PeopleSoft CTI transfers data to populate transaction pages using one of two methods, depending on your PeopleSoft database system. If you are working with only a single database and have no portal in use, PeopleSoft CTI communicates directly with the database to populate the transaction page. If you are using more than one database or operating your PeopleSoft system with a portal in use, PeopleSoft CTI opens the transaction page using an IScript. The IScript communicates with the targeted database to populate the appropriate transaction page with the caller's data, as shown below.



Flow of customer information

The application page that appears in the call taker's browser can be executed based on information that is available from the call. For example, the ANI (automatic number identification) of the calling party can be used to perform a database search, and, if there is a match, the system displays a person record. Or if the caller enters a case number, the Case page appears on the call taker's screen with the existing information already populated.

To set up CTI target pages for your site:

1. Set up the Genesys software and strategy according to the Genesys documentation.

The Genesys T-Server provides the messaging layer that controls the delivery and routing of messages between the CTI applications.

2. Configure the PeopleSoft CTI application for your system.

The PeopleSoft CTI application receives the information from the telephony server and launches a new browser window according to the parameters that it receives from the phone call. It also controls the call and enables the call taker to perform actions such as answer the call, transfer the call, and so on.

3. For the targeted page, determine which key fields the application page needs to receive from the IVR/Genesys system.
4. Use the CTI Mapping page to enter page routing information and assign a transaction ID.

You might want to use additional mapping pages to create additional CTI transactions depending on your business needs.

5. Return to the IVR/Genesys system and ensure that the key fields are being populated from the strategy and that the transaction number is assigned by the IVR/Genesys system.

For more information about setting up and using PeopleSoft CTI, see the *PeopleTools CTI PeopleBook*. **For more information** about configuring your Genesys T-Server, refer to your Genesys documentation.

Setting Up CTI for PeopleSoft CRM

After you set up your Genesys software and your PeopleSoft CTI application, complete your CTI setup by specifying which databases you are using to launch the application pages. The setup steps for your site will differ depending on how you've set up your PeopleSoft system. Your configuration options are:

- Single PeopleSoft database without the portal installed.
- Multiple PeopleSoft databases without the portal installed.
- Single or multiple PeopleSoft databases with the portal installed.

If you are setting up CTI on a single database and you are not using the PeopleSoft portal, you only need to set up the mapping for each target application page. For multiple databases without the portal or for sites that are using the portal, there is one extra page that you need to complete to configure CTI.

Setting Up a Single PeopleSoft Database Without the Portal

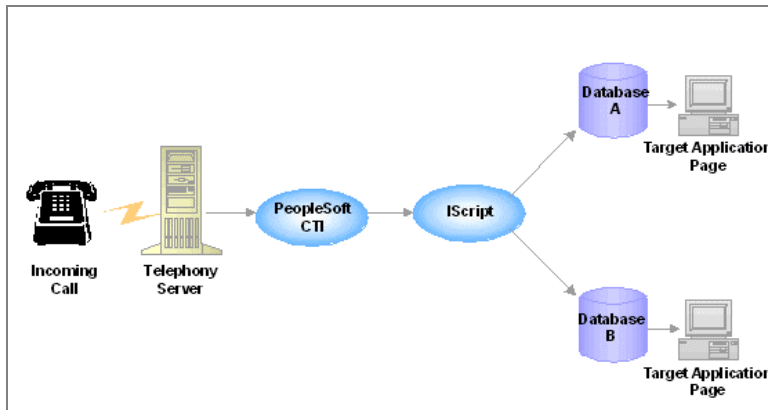
If you are using a single database without the portal, PeopleSoft CTI formats a URL for the browser with a specific target PeopleSoft menu, component, and page. The URL also contains all of the call parameters that are sent to it by the Genesys telephony server. These are the parameters such as case number, ANI, and so on that can be passed to the target application page and populate that page.

Single database setup without the portal requires you to enter the system data for the target page on the CTI Mapping page. This mapping contains the navigation that points to a predefined application page.

Note. If you are using the transactions that are delivered with PeopleSoft 8 CRM, you do not need to use the Mapping page to create your transactions and mappings—it has been done for you already. You simply need to take the key fields and the transaction numbers for the delivered transactions and program them into the IVR system.

Setting Up Multiple Databases Without the Portal or One or More PeopleSoft Databases With the Portal

If your PeopleSoft system includes multiple databases or if you are using the PeopleSoft Portal (regardless of how many databases), your site requires some extra setup. Rather than going directly to the target application page, PeopleSoft CTI sends the phone parameters to an IScript. The IScript uses PeopleCode to route the telephony parameters to the target application page on the database that you've designated for a particular type of transaction.



Flow of information using an IScript

After you have mapped to each target page using the CTI Mapping page, enter target database information and assign specific transaction IDs to these target databases using the CTI Configuration page.

When you map your telephony parameters to an application page, you are defining which page appears on the call taker's screen based on the kind of information the caller enters into the system. The CTI Transfer page takes the key information from the call (including the transaction ID) and routes to the specific application page that has been designated as the target page for each CTI transaction.

Understanding CTI Transactions

When you set up your phone switch, analyze the expected phone transactions that your call center will deal with. There are basic parameters that you want to capture and pass on to your CTI system. The IVR assigns specific questions and their responses to a specific transaction number that is passed to the PeopleSoft CTI application. To route the call successfully, assign a transaction ID to incoming calls and capture the required fields that the PeopleSoft applications expect to be populated from the incoming call.

For example, if the caller enters values for customer ID and order number, the IVR system processes the call as a transaction number 2. (In this example, transaction number 2 is mapped to the Order Entry page.) The CTI system then routes the call and displays the Order Entry page with the customer ID, order number, and any other pertinent information from the call.

Page Transfers in CRM Support and CRM HelpDesk

When calls come in for either Support (transaction 2) or HelpDesk (transaction 3), the target component is the update case component and the target page is RC_CASE_HIDDEN. This page is not displayed, but is used to set the global variables to call the generic Case Search page.

Using the Case Search page, the system populates the Case ID and Business Unit fields, searches for a match, and when it finds the match it displays the Support or HelpDesk Case page. If the case ID is not valid, the system displays the Case Search page. From the Case Search page, the agent can clear the Case ID field of the incorrect ID and search for the caller's information based on the phone number.

CTI Transaction Number	Required Fields from IVR	Target Page
1 - Sales Order Lookup	Service Order CTI Transaction Number Other DN	RF_SERVICE_ORDER
2 - Support Case Lookup	Case ID CTI Transaction Number Other DN	RC_CASE_HIDDEN
3 - Help Desk Case Lookup	Case ID CTI Transaction Number Other DN	RC_CASE_HIDDEN
9 - CIC Page	Customer ID CTI Transaction Number Other DN	RI_CIC_HOME
99 - CTI Test	Customer ID CTI Transaction Other DN	CTI_TEST

Mapping to the Application Page

For PeopleSoft installations with a single PeopleSoft database, the CTI Mapping page is the only CTI setup page that you need to complete. (If you are using only the delivered CTI transactions, you do not need to set up the CTI Mapping page for these transactions.) After you have created your mapping pages, ensure that the key fields and transaction numbers have been programmed into the IVR system.

If you have multiple databases or are using a portal, complete a second setup page that links the call transaction to a specific database. The CTI Configuration page enables you to specify which database each CTI transaction number will be routed to. If you are using a portal, this page is where you can establish the portal URL for each transaction.

CTI Mapping Page

Usage	Use the CTI Mapping page to map a transaction ID to a specific application page.
Object Name	CTI_PS_MAPPING
Navigation	Manage Integration Rules, Define CTI Setup, Setup, CTI Mapping
Access Requirements	Enter a transaction ID.

CTI Mapping

Transaction ID: 1 Sales Order Look-up ☐ Foreign Transaction

*Menu Name: RF_SERVICE_ORDER

*Menu Bar Name: ORDERS

*Component ID: RF_SERVICE_ORDER

*Page Name: RF_SERVICE_ORDER

*Edit Table: RF_SO_SRCH_VW RF_SO_SRCH_VW

☒ Update/Inquiry ☐ Add

Primary Keys	
Search Record Field	URL Parameter
BUSINESS_UNIT	<input type="checkbox"/>
SO_ID	<input checked="" type="checkbox"/>

View All First 1-2 of 2 Last

CTI Mapping page

Transaction ID

The identifier for each CTI transaction type.

Foreign Transaction

Select this checkbox if you are setting up a transaction that resides in another database.

Menu Name

The menu name for the target application page.

Menu Bar Name

The menu bar name for the target application page.

Component ID

The component ID for the target application page.

Page Name

The page name for the target application page.

Edit Table

The edit table associated with the target application page. This field creates the default search record for the target component.

Update/Inquiry

Date/time stamps the record when it has been updated.

Add

Date/time stamps the record when it is added.

Primary Keys

The Primary Keys group box displays the search record fields for the page that you are mapping to. These are the values that are required to come from the IVR. Select the fields

that you are expecting to come from the system as URL parameters and select the check box for the primary key.

CTI Configuration Page

Usage	Use the CTI Configuration page to map a transaction ID to a target page on a specific database. Use this page if you have several databases or if you are using the portal.
Object Name	CTI_CONFIG
Navigation	Manage Integration Rules, Define CTI Setup, Setup, CTI Configuration
Access Requirements	Enter a content provider name.

CTI Configuration

Content provider name: CRM

CTI Description: CRM Transactions [Get Content](#)

Target DB URL: http://<servername>/servlets/clientServlet/peoplesoft8/

Target Portal URL: http://<servername>/servlets/psportal/peoplesoft8/

Menu Name: CTI_CONFIGURATION

Market: Global

Menu Bar Name: SETUP

Component: DERIVED_CTI

Unassigned Transactions	
Selected	Transaction ID
<input type="checkbox"/>	

Assigned Transactions	
Selected	Transaction ID
<input type="checkbox"/>	1
<input type="checkbox"/>	2
<input type="checkbox"/>	3

CTI Configuration page

The system displays the **Content Provider Name** that you entered to access the page. The system checks the content provider table for any content provider entry with the same name as you've specified on this page. If an entry is found, the value is used to populate the **Target DB URL** (target database URL) field.

CTI Description

The description of the database.

Get Content

Click this link and the system automatically enters the target portal URL into the field from the content provider. The content provider registers a logical name for a web server (the web server name, the port, and so on).

Target DB URL (target database URL)

The URL of the database that you are assigning transaction IDs to.

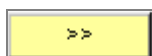
Target Portal URL	The URL of the portal. If you click Get Content , this information is automatically populated from the provider registry.
Menu Name	The menu name for the target application page.
Market	The market that is the primary focus of your business.
Menu Bar Name	The menu bar name for the target application page.
Component	The component name for the target application page.

Assigning Transactions to the Database

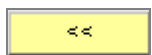
The **Unassigned Transactions** region of the page displays all CTI transactions coming into the specified database that have not been assigned to any content provider. In cases where there are several databases, assign different types of incoming CTI transactions to different databases. You can assign a transaction to only one database. For example, you can set up incoming CTI transactions with an ID of 2 to be assigned to your PeopleSoft CRM database because they are related to CRM Call Center cases.

Selected Select this check box to assign the transaction ID to the current database.

Transaction ID The ID of the incoming CTI transaction. This number is assigned by the IVR based on the CTI tree that you are using.



Click this button to move an unassigned transaction to the assigned list.



Click this button to move an assigned transaction to the unassigned list.

The **Assigned Transactions** region of the screen displays all transaction IDs that are assigned to the specified database.

Selected Select this check box to unassign the transaction ID.

Transaction ID The ID of the incoming phone transaction. This number is assigned by the IVR based on the CTI tree that you are using.

Testing Your CTI Connection

The CTI Test page enables you to check the routing for your CTI setup. To test your connection, enter transaction number 99 (CTI test transaction) into the IVR. If the connection is correct, the CTI Test page will appear with transaction data for a transaction 9.

CTI Test Page

Usage	Use the CTI Test page to test your CTI application.
Object Name	CTI_TEST
Navigation	Define Integration Rules, Define CTI Setup, Setup, CTI Test Page
Access Requirements	None

CTI Test page

Installation Code The product installation code.

Derived CTI Page

Usage	Use the CTI Transfer page to route calls to target pages. This page is not an end-user page and is not a page that you would normally navigate to.
Object Name	DERIVED_CTI
Navigation	Define Integration Rules, Define CTI Setup, Setup, CTI Target Page
Access Requirements	None

Derived CTI page

Managing PeopleSoft CRM Search

Searches enable PeopleSoft CRM users to locate pertinent information in the CRM search collection based on key words or phrases that have been entered into a search page. The search engine checks an indexed set of files for unique keys that are entered into that search page and displays matches in the search results.

To make a set of documents available for searching, you must first create a collection in your database. A collection is a set of special directories and files that the search engine uses to find and display source documents that match the criteria that you enter on the search page. This collection contains special criteria and pointers to the source documents. For database records, data is extracted from the database records and entered into the search collection input files, along with the keys to the record. Building a collection creates a snapshot of your data at a single point in time. Rebuild your collection regularly to keep your collection up to date. When you rebuild a collection, you can either rebuild the CRM search collection, or you can run an incremental update that adds new information to the existing collection.

Performing Searches

This section describes the different ways that you can perform searches in PeopleSoft CRM.

Understanding Search Options

PeopleSoft CRM provides three search tools. All tools search the same collection (there is only one CRM search collection). However, the different tools search different objects within the collection. For any given object that is searched, the tool searches only the fields defined in the search index template.

- *Universal Search Tool* searches any object in the CRM search collection.

This tool is the only one that enables you to enter field-specific search criteria; the other tools search all fields defined in the search index template.

This tool is available in all PeopleSoft CRM applications.

- *Solution Advisor for cases* searches only specific objects that help call center agents identify solutions to cases.

This tool searches solutions, cases, problem solving techniques, and, for business units that allow them, independent text solutions.

Solution Advisor for cases is the only search tool with the ability to do more than just view results: it enables you to associate selected solutions with a case and to select the solution status that indicates whether the solution resolved the case.

This tool is available in PeopleSoft CRM Support and PeopleSoft CRM HelpDesk. It is available to both call center agents and self-service users.

- Solution Advisor for service orders searches only solutions.

This tool is available in PeopleSoft CRM FieldService.

All three search tools provide results lists that are ranked according to how closely an object matches the search criteria. All tools also offer a choice of natural-language searching or keyword searching (except the self-service version of Solution Advisor for cases, which permits only natural-language searching). Natural language searches are based on phrases or sentences that you enter. During the search, “noise words” like *and*, *the* and so on are stripped out and the system searches for the remaining words. A keyword search uses query operators and searches on specific words and their relationship to the operators that you enter.

Universal Search Tool is documented in the following section. **For more information** about Solution Advisor for cases, see Using Solution Advisor in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook*. **For more information** about Solution Advisor for service orders, see Working With My Service Orders in the *PeopleSoft CRM FieldService PeopleBook*.

Using Universal Search Tool

When you access the Universal Search Tool page, you first must select the search record (the type of object that you're looking for). To be searchable, a record must have a search index template defined for it. The search index template determines which fields in the records are searchable.

Once you've selected a record, there are two ways to define search criteria. You can use either method by itself, or you can use both of them together.

The first way to define search criteria is to enter *record-level* search criteria. The system searches for matching text in all of the fields included in the record's search index. The system ranks the search results according to how close the match is.

If you enter record-level search criteria, you can decide whether to use a natural-language search or a keyword search.

The second way to define search criteria is to enter *field-level* search criteria. After you select a search record, the system displays a list of the searchable fields. For each field, you can enter a search operator and the search text. You can also decide whether to limit the results to records that meet all field-level criteria or whether to accept records that meet any individual field-level search specification.

The following table describes each of the search operators available for field-level searching.

Operator	Description
<	The value that you enter is less than the field value.
<=	The value that you enter is less than or equal to the field value.
<>	The value that you enter is not equal to the field value.
=	The value that you enter is equal to the field value.
>	The value that you enter is greater than the field value.
>=	The value that you enter is greater than or equal to the field value.
BETWEEN	<p>The field value is between the two values that you enter. You must enter an <i>and</i> between the two values that you enter.</p> <p>For example, if you select <i>BETWEEN</i> and enter <i>100 and 200</i>, the search returns values from 100 to 200, inclusive.</p>
CONTAINS	The value you enter is contained in the field that you are searching.
ENDS	The value that you enter matches the final characters of the field value.
IN	You enter a comma-delimited series of values, and the system finds field values that match any one of the values you entered.
LIKE	<p>The value you enter sounds like or has a similar spelling to the matched field. When you select <i>like</i>, you can use wildcards in your search criteria.</p> <p>For more information about using wildcards in searches, see Using PeopleSoft Applications.</p>
STARTS	The value that you enter matches the first characters of the field value.
SUBSTRING	The character string you enter is matched with a portion of the values in the field you are searching.

Note. Searching is not case-sensitive.

Universal Search Tool Page

Usage	Use the Universal Search Tool page to locate pertinent information in the CRM search collection.
Object Name	RC_ST_SEARCH
Navigation	Define Business Rules, Structure Searching, Use, Universal Search Tool, Search Criteria
Prerequisites	Build your CRM search collection.
Access Requirements	None

Universal Search Tool

Search Information

Record:

Search:

Additional Search Information

Field	*Operator	Search Text
Case ID	=	<input type="text"/>
Business Unit	=	<input type="text"/>
Product ID	=	<input type="text"/>
Problem Summary	CONTAINS	Dishwasher

***Display:** ***Search By:** ***Match On:**

[Search Tips](#)

Search Results

	Score	Case ID	Business Unit	Problem Summary
	77%	116	US200	Problem with the Dishwasher Cycle
	77%	119	US200	Discoloration in the dishwasher
	77%	124	US200	Getting rid of permanent film on Glasses when wash

Universal Search Tool page

Search Information

Record

Select the record to search. The drop-down list box provides a list of all records for which you have defined search index templates.

Search

Enter record-level search text.

Display

Select the number of rows of data to display in the **Search Results** grid. You can select **10, 25, 50, 75, 100, or 250**.

Search By

Select **Phrases** to perform a natural language search. Select **Keywords** to perform a Boolean search. If you select **Keywords**, click the **Search Tips** link for an explanation of the proper syntax for your search text.

This setting applies only to the record-level search criteria, not to any field-level search criteria.

Match On

Select **All words (AND)** to search for data that meets all of the field-level search requirements that you specify. Select **Any words (OR)** to search for data that meets any one of the field-level search requirements.

This setting applies only to the field-level search criteria you enter in the **Additional Search Information** region, not to any field-level search criteria.

Search

Click this button to perform the search. The system searches the specified record for data that meets your criteria and then displays the matching rows of data in the search results grid.

Search Tips

Click this link to view tips for constructing keyword searches. For example, the search tips provide information on the use of *and* and *or* in searches and on searching for entire phrases.

Additional Search Information

This region lists the fields in the record's search index so that you can enter field-specific search criteria.

Field Label

A descriptive label for the field. If there are multiple labels defined for a field, the default label appears.

Operator

Select one of the following search operators: **<**, **<=**, **<>**, **=**, **>**, **>=**, **BETWEEN**, **CONTAINS**, **ENDS**, **IN**, **LIKE**, **STARTS**, or **SUBSTRING**.

Search Text

Enter the search criteria for the field.

Search Results

The following page elements appear regardless of the search record.



Click the **Details** button to display a page with more information about an entry in the search results grid (the page that you associated with the search record on the Template Menu page).

Score

A rating between one and one hundred that represents how closely the entry matches your search criteria.

All other columns in the **Search Results** grid vary depending on which record you searched and how you defined the search index template for that record. (On the Search Index Template page, select the Include in Application Results check box to identify the fields to appear in the search results grid.) The columns display the data found by the search.

Note. Although the system uses the data in the search collection to determine which data matches your search criteria, the **Search Results** grid displays the field values stored in the database. If your search collection is out of date, the displayed values may not match the search collection.

Setting Up the Search Collection

When you set up the search engine for the first time, you must consider how to structure your database to make the most efficient use of the search engine in locating records.

The search collection builds one collection at a time, although two collections are maintained within CRM—one as a working collection and the other as a temporary collection. During the process, the system builds the new collection using a temporary name and leaves the current collection available to users while the new collection is built. When the build is complete, it

then swaps the active collection name with the temporary collection name so that the newly built collection is the one used for searches. The following procedure provides a general guideline for creating the database collection for the search engine.

To set up your search collection:
--

1. Define criteria for aging and for usage increments and decrements and the optimize frequency for your collection on the Search Settings page.

This page defines the parameters for the *usage score* for each record object. The usage score indicates how often and how consistently this record is used over time. Additionally, you can define how often to run an incremental build before optimizing the collection.

2. Decide which records to include in the collection.

For example, if you are working with cases, you might want to index cases, solutions, and other objects that are related to cases. You do not want to index other objects such as company or person unless you have some special business rules that require you to include them in the index.

3. Identify how many indexes are needed for each record object in the collection.

A search *index* is a set of objects that enable you to create, delete, insert, and update a search collection and the items in it. Search index items contain a set of statistics about the document that has been indexed (keywords, number of occurrences, proximity to other words, and so on). Generally, you will want to index only those fields on a record that are being used in the search.

4. Set up how to index the records that are associated with an object using the Index Template page.

When you set up your index templates, define one index template for each record object. You can enter a *where* clause at the object level to limit which rows are selected for inclusion in the search collection. .

5. Select the fields that you want to include in the index template.

The index template determines which fields are searched, which fields are returned as part of the search results, which fields appear as results, the order that those fields appear, and which objects are excluded from the search.

It's unnecessary to include all fields in an index template. For example, if you are indexing solutions, select only the fields that contain the most pertinent information for searching—fields such as the Symptoms field or the Details field. You do not want to include fields like Entered By or Date Entered.

There is a decrease in efficiency if you choose more fields as index fields or index search results fields. Verity must then store that information internally when building the collection and increase the amount of values that it returns as part of the search results.

Configuring Verity on Your Application Server

The search collection path on the run control must be identical to the search collection path on the application server and the search collection path for the Process Scheduler server. If you have multiple application servers, make sure that the paths for all of the servers are identical or make sure that your users select the correct one if you configure the Verity search collection for only one application server.

The Verity directory must reflect the directory where the Verity tool set is installed. This directory should contain `<platform>/bin/mkvdv` path:
`%PSVERITYDIR%_nti40\bin\mkvdv`.

For Windows NT and UNIX operating systems, make sure that the `PS_HOME` environments variable points to your current tools home directory; for example, `PS_HOME= c:\pt814` on Windows NT or `/ps/psasgrp/casb`. The BAT or Sh file that builds or updates the collection uses this variable. It should not contain an ending slash or backslash.

For UNIX, make sure that the Verity executable programs are part of the path defaulting set of directories. Make sure that `mkvdv` executable is part of the path. You must also make sure that `chmod` and `sh` are located in the home directory for the Process Scheduler server or set a softlink pointing to it. For example:

```
ln -s /bin/chmod $PS_HOME/chmod
ln -s /bin/sh $PS_HOME/sh
```

Configuring Verity on Your Process Scheduler Server

This operation runs a Build Search Collection Application Engine job on Process Scheduler, so the Process Scheduler that runs this job must have access to the application server path for the Verity collection and should have the same capabilities as the logon used to start up the Process Scheduler. Always use a logon ID that has administrative abilities to create and remove the files and directories that are created as part of the build collection process.

For more information about setting up Verity, see the Installation documentation for PeopleSoft 8 CRM on Customer Connection.

Verity Technologies

The following are the basic pieces of the Verity architecture incorporated in the PeopleSoft CRM search architecture:

- Search Collection

This is the set of files forming a search index. When a user performs a search, the search is conducted against the search collection.

- BIF File (bulk insert file)

This is an intermediate file created in the process of building a collection. The BIF file is a text file used to specify the documents to be submitted to a collection. It contains a

unique key, document size (in bytes), field names and values, and document location in the file system. Fields are defined in this file and stored in the collection for retrieving and searching and can be returned in a results list. Fields defined in this file are automatically defined as fields and zones.

- MKDVK

This is Verity's command-line tool. It is used for several tasks:

- To index a collection.
- To insert new documents into a collection.
- To perform simple maintenance tasks, such as purging and deleting a collection.
- To control indexing behavior and performance.

- TXT File

This is another intermediate file created in the process of building a Verity collection. The TXT file is a text file named inputLLLm.dat that contains all the information from the documents that will be searchable but will not be returned in the results list. (*LLL* is a three-character language code abbreviation and *m* is either U for update or C for create.) This information is stored in zones.

- Zone

A zone is a specific region of a document to which searches can be limited. A zone filter can index documents in tagged ASCII formats and store the zone information at the end of the word index. When the zone filter is used, the search engine builds zone information into the collection's full-word index. The index, enhanced with zone information, permits quick and efficient searches over zones. The contents of a zone cannot be returned in the results list of an application. A region of text can be only a zone, or it can be both a field and a zone. An example is <DESCR>Long Sleeve Shirt</DESCR>.

- Style Files

These files describe a set of configuration options used to create the indexes associated with a collection. Each collection has one collection style and it is defined in a set of style files before you create the collection. There is a default set of style files that is provided for each application collection. These are copied over to the style directory within the collection/language_code directory as part of the build process. This file contains all of the style files used to build the language-specific collection.

You should not need to interact with these files unless you are modifying the delivered CRM Search Collection features. **For more information** about Verity files, see your Verity documentation.

Understanding Style Files

Each Verity collection has a set of style files that describe and control the collection. Most style files are somewhat fixed and do not change from collection to collection. The following is a list of the different style files and what they control. These files describe a set of configuration options used to create the indexes associated with the collection. Each collection has one collection style and it is defined in a set of style files before you create the collection. These are delivered as part of your application install CD.

File Name	Description
Style.ddd	This style file should never be edited. It contains Verity-defined internal fields.
Style.sfl	This style file contains the Verity standard fields. This can be edited to comment out standard fields that are not relevant the specific collection to save space.
Style.ufl	This style file defines fields that are specific to this collection. This is where you define the fields that are specific to the collection that you are designing.
Style.lex	This style file specifies those non-alphanumeric characters to be interpreted as valid characters in words stored in a collection's full work index; for example, AT&T.
Style.go	This style file (if it exists) contains a list of the specific words that will be included in a collection's full word index—only the words listed will appear in the indexes.
Style.vgw	This style file control identifies the gateway to be used to access documents for indexing. If it doesn't exist, the default file system gateway is used.
Style.dft	This style file controls what document filter is called. In general, this file should not be edited, unless you want to call a filter other than the universal filter.
Style.uni	This style file should not be edited in general; it controls which specific filters the universal filter calls. This is a list of the file types, and which filter will be called, that the universal filter will recognize.

Creating a Search Collection

Initially, you want to look at how records are used at your site to determine which records you want to index and set up in the collection. If you use Solution Advisor, you must index solutions. If you use Solution Advisor for cases, you should also index independent text solutions, cases, and problem solving techniques. Within each record, select only those fields that contain keywords regarding the product, release, or problems and solutions with their associated objects that will help your agents locate a possible solution. For example, when you define an index template for cases, include case Summary and Description fields as index fields to search on. You also might want to return the Product ID and Case Status fields as well.

Solutions, cases, problem solving techniques and independent text solutions must be indexed in order for Solution Advisor to search these objects. PeopleSoft delivers search index

templates for these objects. You can modify these templates if you want to change which fields are searched. Any additional records that you index are searchable through Universal Search Tool only.

To create a search collection:

1. Define criteria for aging and for usage increments and decrements and optimize frequency for your collection on the Search Settings page.
2. Create an index template for the collection using the Search Index Template page.

Index templates are used when you build the collection to define which records and fields are used for the search or returned to the calling application page on the search results. You must build a new template for every record that you want to include in the search collection.

3. Build the collection using the Build Search Collection page.
4. Select whether to build the search index for **All Installed Languages** or not.

The default is to build the index for all installed languages. Change this setting if necessary. If you choose this setting, it creates a collection for all language codes installed on the PeopleSoft system.

5. Select the **Language Code** for which you want to build the search index.
6. Select a search collection setting to either create a new collection or update the existing one.

You must create the collection before you can update it. Choosing the update option before the collection has been created will result in an error.

7. Select the **Reset Usage Count/Date** if you wish to reset the current usage count and set the last usage date/time to null on rows included in the new collection.

In certain CRM applications when a particular solution is marked as used, the system updates the last usage date/time to the current date and the usage count is increased. When search results are returned, a row with a high usage count and recent usage date should appear to the top of the search results. Reset the usage count/date if you want to initialize the usage count feature.

8. Select the Process Scheduler that you've configured to run the process and click **Run** to launch the build process.

Defining Search Settings

When the search engine searches a collection, it calculates a *relevance score* and displays the results from highest relevance to lowest relevance in a results list. A relevance score is a value that is calculated for each result based on how many times a key word appears in the document, how often the document is used, how long the document has been in the database, and so on. This relevance score is then factored into the usage score to return the results.

The Search Settings page defines the parameters for the *usage score* for each object record. The usage score indicates how often and how consistently this record is used over time. The more often a record is used increases its score. If a record has not been selected as used during a set period of time, a specified number is subtracted from its score and its relevance decreases.

For example, assume that a new product was released and a problem was found. A new solution record is created that describes the solution. In the first month, your site may get many calls for which this solution record is used. Each time that the record is identified as used, its usage score increases by the value that you entered in the Usage Increment field and its last usage date is updated to the current date. This creates a higher relevance for this record.

Search Settings Page

Usage	Use the Search Settings page to set up usage scores and aging intervals for your search collection.
Object Name	RB_SRCH_PARS
Navigation	Define Business Rules, Structure Searching, Setup, Search Settings
Access Requirements	None

Search Settings

Search Collection Name: CRM_RB_SRCHDB

Temp Collection Name: CRM_RB_SRCHDB2

Description:

Specifies how many days can pass before the Usage Count of an unused object record is automatically decremented.

Aging Interval in Days:

This number is added to the object record's Usage Count each time it is selected as used.

Usage Increment:

This number is subtracted from the object record's Usage Count each time it passes its aging interval.

Usage Decrement:

Perform an optimize on the search collection each time this number of incremental builds have occurred

Optimize Frequency: **Incremental Build Count:** 0

Created DateTime: 05/06/2001 3:41 PM

Updated Date Time: 05/06/2001 3:41 PM

Search Settings page

The system displays the current **Search Collection Name** that you entered to access the page and the **Temp Collection Name** that will be used for the next build.

Search Collection Name The name of the active search collection.

Temp Collection Name	The name of the temporary search collection that will be created during the build process. This becomes the active collection name after a successful build.
Description	Freeform text to describe this collection.
Aging Interval in Days	<p>The number of days that can pass before the usage count of an unused object record is automatically decreased. If the aging interval is 30 days and the record is not selected in over a month, then the usage score decreases by the number that you entered in the Usage Decrement field. This creates a lower relevance for this record. As the number of calls for this solution decreases over time, its relevance decreases.</p> <p>The Universal Search Tool does not use this field. Solution Advisor does use this field if the Alternate Scoring check box is selected in the Solution Management Default Setup page.</p>
Usage Increment	<p>This number is added to the object record's score each time that the object is selected as used. The default value is 1.</p> <p>Solution Advisor does not use this field, but increases or decreases the count based on associating solutions with cases. The Universal Search Tool does not track usage counts.</p>
Usage Decrement	<p>This number is subtracted from the object record's score each time that it passes its aging interval value. The default value is 1.</p> <p>Solution Advisor does not use this field, but increases and decreases the count based on associating solutions with cases. The Universal Search Tool does not track usage at all.</p>
Optimize Frequency	<p>Optimizes the search collection each time that this number of incremental builds has occurred. The default value is 5. For example, on incremental build 5 and incremental build 10, the collection is optimized to reduce the number of partitions and maximize the amount of data stored in each partition.</p> <p>For more information, see the Verity documentation.</p>
Incremental Build Count	Starts at 0 and is incremented by 1 each time that an incremental build is performed if there was new data in the incremental build. This number is reset to zero when the collection is recreated.
Created DateTime	This read-only field displays the date and time that the collection was created.

Updated Date Time

This read-only field displays the date and time that the collection was last updated.

Defining the Index Template

The system uses the index template to build the collection based on the records and fields that you specify in the Search Index Template component. You create one index template for each record that you want to include in your search collection.

You also have the option of using a SQL *where* clause to filter out record occurrences that you don't want added to the search collection. If you enter a where clause, it creates a SQL statement that selects which rows are input data when you build the collection and ignores all other rows.

The Template Menu page enables you to enter the page navigational route so that the system can display the target pages that relate to your search results.

PeopleSoft recommends that you test your initial index template record to determine which fields need to be search indexes and which ones should be search result fields. The fewer fields included as search index or search result fields, the faster the collection will be built and the search results retrieved. In particular, avoid selecting long character fields such as comments. You can still search across comments by selecting them as Include in Search Index fields, but it will reduce the build time if the comments do not have to be added.

It reduces processing time to construct a view of the record that contains only those index and search results fields and use that view as the record specified on the index template definition. Behind the scenes, the PeopleCode is doing a %SelectAll on the record, so the fewer fields in the record, the faster it will process.

Search Index Template Page

Usage	Use the Search Index Template page to specify which fields you want to include in the search collection as index fields.
Object Name	RB_SRCHIDX_TMPL
Navigation	Define Business Rules, Structure Searching, Setup, Search Index Template
Access Requirements	Enter a record (table) name or description.

Search Index Template

Record (Table) Name: RC_SOLN_ATTACH Solution Attachments

Specifies which rows to include in the search collection (optional). For example, WHERE RC_SCRIPT_STATUS = 'P' will select only rows with this value.

SQL Stmt:

Enter the directory where App Server can find attachments.
URL for FTP server must also point to this directory.

Attachment Record ☒

Choose which fields to search on, which fields to return from the Collection as search results and which fields to display on the Application page search results

Search Collection Fields						First <input type="button" value="1"/> 1-10 of 10 <input type="button" value="10"/> Last
Field Name	Description	Include in Search Index	Include in Search Results	Include in Application Results	Field Number	
1 ATTACHSYSFILENAME	Unique System Filename	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
2 ATTACHUSERFILE	Attached File	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
3 ATTACH_SEQ_NBR	Attachment Sequence Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
4 DESCRIPTION	Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
5 ROW_ADDED_DTTM	Datetime Added	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
6 ROW_ADDED_OPRID	Added By	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
7 ROW_LASTMANT_DTTM	Last Modified	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
8 ROW_LASTMANT_OPRID	Last Maintained By	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
9 SETID	SetID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
10 SOLUTION_ID	Solution ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	

☒ [Select All](#) ☐ [Clear All](#) [Delete Index Template](#)

Search Index Template page

The system displays the **Record (Table) Name** that you entered to access the page along with its description.

SQL Stmt (SQL statement) Enter the SQL statement.

Attachment Record File attachments are not supported for this release of CRM. Entering a value in this field will result in an error message.

Search Collection Fields

Field Name Read-only field that displays the name of the field.

Description The description of the field.

Include in Search Index Select this check box to search across this field. Verity uses this field to build the collection.

Include in Search Results

Select this check box if you want to have this field returned as part of the Verity API call results if a match is found for the row. You do not need to search on the field in order to return it as part of the results. For example, you can have Product ID returned as a search result field that is displayed along with the description index field that contains a match. Verity uses this field to build the collection.

Note. Select this check box for key fields only. Both Solution Advisor and the Universal Search Tool need to get keys from Verity, but they use the keys to get the rest of the information from the database.

Include in Application Results

Select this check box to have this field appear on the Universal Search Tool page. (The Solution Advisor results grid does not depend on this setting). This is not used by Verity in building the collection, but designates the field as one to display in the search results.

Field Number

The order that the field should be displayed on the Universal Search Tool page. This field is not used to build the collection but is used to order the results.

Select All

Selects all the check boxes under **Include in Search Index**.

Clear All

Clears all the check boxes under **Include in Search Index**.

Delete Index Tmplate

Displays the Delete Confirmation page that enables you to delete the current index template.

Delete Confirmation Page

Usage	Use the Delete Confirmation page to delete the current index template.
Object Name	RB_DEL_CONFIRM
Navigation	Click the Delete Index Template link on the Search Index Template page.

Search Index Template

Delete Confirmation

? Are you sure you wish to delete the Search Index Template for record: RB_ACT_RQST

Yes - Delete **No - Do Not Delete**

Delete Confirmation page**Yes - Delete**

Deletes the index template and displays the Search Index Template lookup page.

No - Do Not Delete

Does not delete the index template and displays the Search Index Template page.

Template Menu Page

Usage	The Template Menu page uses the values that you enter on this page to link a search results field to a particular page in a PeopleSoft application when you are using Universal Search Tool. You specify the navigational route that an end user must follow to arrive at the same page using the PeopleSoft menu interface. This page is optional unless you are using the Universal Search tool.
Object Name	RB_SRCHIDX_TMPL2
Navigation	Define Business Rules, Structure Searching, Setup, Search Index Template
Access Requirements	Enter a record (table) name.

Template Menu page

The system displays the **Record (Table) Name** that you entered to access the page along with its description.

Menu Name

The menu name for the application.

Menu Bar Name

The menu bar name for the application.

Item Name

The menu item's name for the application.

Page Name

The page that you want to display in the application.

Action

The types of tasks that you are allowed to perform on the page. Valid values are *Add*, *Correction*, *Data Entry*, *Update/display all*, or *Update*.

Delivered Search Templates

Solution Advisor helps you find case solutions by searching four types of objects. PeopleSoft delivers search index templates for these objects. You can modify the search index templates if you want to search fields other than the ones specified in the delivered template.

The following table lists the records for which PeopleSoft delivers search index templates.

Record	Description
RC_CASE	Call center case table
RC_IT_RSLN_VW	Independent Text Solutions
RC_PST_VW	Problem Solving Techniques
RC_SOLUTION	Solutions

Building Your Search Collection

After you set up your index template for your collection, run the process that actually build the collection. To build the collection, you must run a PeopleSoft Application Engine program using Process Scheduler. This process takes the record/field data from the index templates and the collection name from the Search Settings page and builds the collection in the directory that you specified on your application server.

If you are adding a new index template record, you should run the Build Collection process in Create mode to pick up all the data from the underlying index template record rows. Running in Update mode will only pick up those rows that have been added or changed since the last time you updated the collection.

When you click Run, Process Scheduler initiates an Application Engine program named RB_SRCH_BLD. You can click the Process Monitor link to view the status of the index build.

For more information about Application Engine and Process Scheduler, see the *PeopleTools Application Engine PeopleBook* and the *PeopleTools Process Scheduler PeopleBook*.

You have the choice of building an entirely new collection or running an incremental update that adds new information to the existing collection. Examine your business processes to decide how often to run an incremental update of your collection as opposed to recreating the entire collection. Factors to consider are how great the volume of changes are to your database, what kind of lag time you can have between a solution coming in and it's availability to be searched, and so on.

An incremental update gathers any changes to the index template and any new information that has been added to the database since the last update to the collection. These new rows are used to create a new .BIF and a new .TXT file that are added to the collection, creating a new partition within the search collection and allowing that data to become available in the search results.

Note. At this time, the PeopleSoft CRM database does not provide delete ability on records, and we are not providing the ability to handle deleted records in incremental mode for the Build Search Collection process. If you have an index template for a record and later change its status (if it has a where clause) or delete that entry from the table, then the collection will still display the search results until the collection is recreated.

To reduce the number of partitions in your database, you'll want to run an optimization of your database on a regular basis. An optimization maximizes the size of the partitions in your database. In most cases, you will want to optimize your database after you've created five incremental updates of the collection. The optimize frequency is set on the Search Settings page.

During a build, the system uses a temporary collection for the new collection that it is creating, and leaves the current collection available to your users. The new name comes from the Temp Collection Name field on the Search Settings page. For example, the current collection that is available to users would be named CRM_RB_SRCHDB. When the system begins a new collection build, it creates a temporary collection with the name CRM_RB_SRCHDB2. After the build process is completed successfully, the system swaps the name of the active and temporary collections on the Search Settings page so that CRM_RB_SRCHDB2 becomes the active collection available to users and CRM_DB_SRCHDB is available as the name for the next temporary collection. When it's time to create the next build, the system uses the name CRM_RB_SRCHDB for the temporary collection and again swaps the collection names when the process is complete. Both collections remain on the system, but only the active collection is accessed during searches.

Errors During the Build Process

The build process will be unsuccessful if the following conditions occur:

- The environment has not been configured properly
- PS_HOME is not set or not on the path
- The Application server, Process Scheduler, or run control collection path do not match each other
- The Verity executables were not installed
- The style folder was not downloaded from the CRM application CD
- The Process Scheduler does not have administrator ability to create or delete files

For more information about installing and configuring Verity on your system, see the PeopleSoft 8 CRM Installation documentation on Customer Connection.

Build Performance Considerations

The Build Search Collection is a batch process. Like most batch processes, it is affected by the amount of data being processed. If the volume of data being processed is quite large then there are a few things that should be done to ensure that the Build Search Collection processes

are complete in an acceptable amount of time. Here are the factors that affect the time that it takes to run the Build Search Collection process. These are listed in the order of importance.

1. The amount of data being processed.

It takes longer for the Build Search Collection to run when there is more data being processed. Reducing the amount of data being processed reduces the time that it takes to build the collection. This can be done by specifying a where clause to filter which records to include in the search collection on the Search Index Template page. Also, running incremental builds instead of full builds is a good approach for reducing the time spent in the build process.

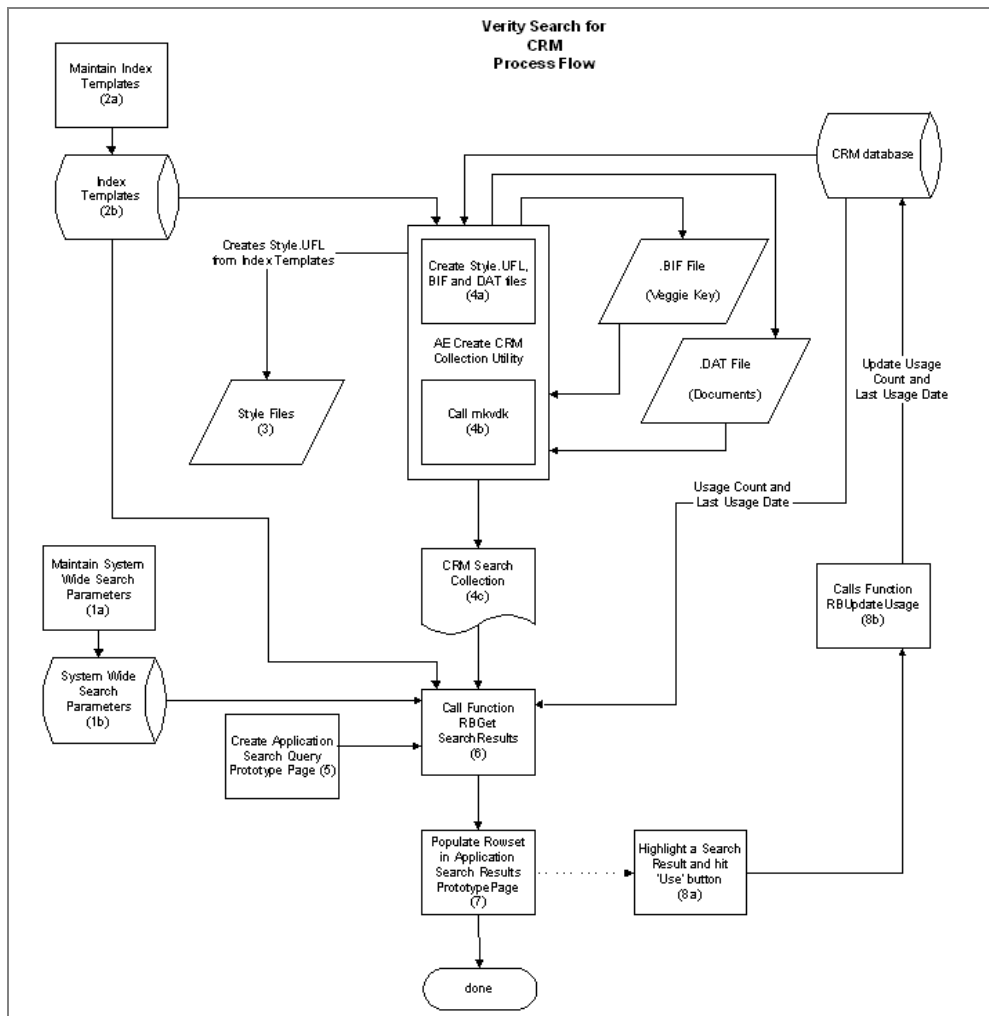
2. How fast the machine is where the Application Engine program resides that builds the search collection.

The Build Collection process is CPU-intensive. It should be run on a machine with a fast processor to ensure that the process is complete in an acceptable amount of time.

3. How much memory is on the machine that runs the build.

The building of the search collection does require a significant amount of memory. You should plan on having at least 256MB of memory on the machine where the Build Search Collection process runs.

The following illustration shows the process flow and the files involved in building a collection using Verity.



Verify search process flow

Application Engine performs the following sequence of steps when it builds the collection in Verity:

1. Accesses the setup files, the style files, and the index template.
2. Creates the .BIF and .TXT files of the data rows that meet the where clause criteria.
3. Builds a .BAT file or Shell script that copies the STYLE.UFL file as well as other style files into the collection based on language code.
4. Runs the MDVDK executable program that builds the collection. The file is located in the PS_HOME\appser\prcs\database\files directory in Windows and in the Process Scheduler home directory in UNIX.
5. Updates the date/time field to indicate when the collection was created or updated.
6. Resets the usage count and the last usage date/time field if the Reset Usage Count check box was selected for the build.

Note. Usage count is not tracked by the Universal Search Tool. Solution Advisor does count usage for solutions, but it is based on associating the solution with a case, not on the usage count fields that you set up in Verity. If you unintentionally reset usage counts, the two PeopleSoft call center applications (PeopleSoft CRM Support and PeopleSoft CRM HelpDesk) provide an update usage count process that can recount solution usage.

When the Application Engine Build Collection program is complete, you can find the collection on the server's Verity search collection path in the CRM_RB_SRCHDB or CRM_RB_SRCHDB2 directory. The builds will alternate between the two paths. For the current path, check the Search Collection Name field on the Search Settings page. Find the directory for the language that you've just built for and this directory will contain the partitions for the collection (in the parts directory), the style files (in the style directory), and so on.

Build Search Collection Page

Usage	Use the Build Search Collection page to build the collection using PeopleSoft Application Engine.
Object Name	RB_SRCH_RUN_INDEX
Navigation	Define Business Rules, Structure Searching, Process, Build Search Collection
Access Requirements	Enter a run control ID.

Build Search Collection

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

Process Frequency

☐ Once
☒ Always
☐ Don't Run

'Request ID:

Description:

'Collection Directory:

Enter the directory for the search collection e.g. c:\pt812\data\search\CRMQAMST for Windows or /ps/psasgrp/casa/data/search/C800R20A for UNIX.

Search Collection Name: CRM_RB_SRCHDB

Temp Collection Name: CRM_RB_SRCHDB2

Server Operating Environment

☒ Windows NT
☐ UNIX \$PS_Home Directory:

Enter the value of '\$PS_HOME' for the process scheduler e.g. /ps/cmrel/cpsb

Search Collection Selection

☒ Create New 05/23/2001 5:06PM
☐ Reset Usage Count/Date
☐ Update Existing 05/23/2001 5:06PM

Language Selection

☐ All Installed Languages
☒ Single Language
 Language Code:

Search Index Templates View All First 1-7 of 7 Last

Record (Table) Name	Record Description	Where Clause Select Criteria
1 RC_BSCRIPT_DEFN	Branch Script Definition Table	WHERE RC_BSCRIPT_TYPE = 'P' AND RC_SCRIPT_STATUS = 'V'
2 RC_CASE	Call Center Case	
3 RC_IT_RSLN_VW	Independent Text Solution	
4 RC_PST_VW	Problem Solving Technique	
5 RC_RESOLUTION	Resolution	WHERE SOLUTION_ID > 0 AND RSLN_STATE = '3'

Build Search Collection page

The system displays the **Run Control ID** that you entered to access the page as well as the **Search Collection Name** and the **Temp Collection Name**.

Report Manager

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

Process Monitor

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

Run

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

For more information about the Report List page, the Process List page and Process Scheduler, see Process Scheduler Basics.

Process Frequency

This group box enables you to select how often to run the Application Engine program that creates the collection.

Once

Executes the request the next time that the background process runs. After the background process runs, the process frequency is automatically set to **Don't Run**.

Always	Executes the request every time that the background process runs.
Don't Run	Ignores the request when the background process runs.

Database Information

This region enables you to enter your database type, the directory where the collection resides, the name of the collection, and other administrative information.

Request ID	A request ID that represents a set of selection criteria for a report or process.
Description	Freeform text of up to 30 characters that describes the request.
Collection Directory	The directory path for the collection. This must match the Verity collection path on the application server and the Process Scheduler server. Any mapped drive must be set as part of the PS_HOME environments variable. If these paths do not match, you will not be able to create the collection.
Search Collection Name	The name of the active search collection.
Temp Collection Name	The name of the next temporary collection. After a successful build, this name is swapped with the active Search Collection name.
Server Operating Environment	Select Windows NT or UNIX. For UNIX operating environments, you must enter the value for the Process Scheduler home directory. This field is used to create the shell script for building the collection.

Search Collection Selection

This group box enables you to select whether you are building a new collection—which overwrites the existing one—or just updating the existing collection. Most often, you just need to update your collection to add new information.

Create New	Creates a new search collection and overwrites the existing one.
Reset Usage Count/Date	Sets the usage count on all objects in the collection to zero and the last usage date to null. This option is only available when creating a collection
Update Existing	This is the incremental update option that gathers all the additional information and changes to the index template records that have date/time stamps after the last update time for a collection. Only choose this option after the collection has been created.

Language Selection

You can build your collection in a single language or in all of the installed languages on your PeopleSoft system.

All Installed Languages	Creates collections for every language that you have installed on your system. This option can be time consuming because the system must build a collection for each installed language.
Single Language	Creates a collection for only the language that you select from the drop-down list box.

Search Index Templates

This region of the page lists all of the index templates that belong to this collection.

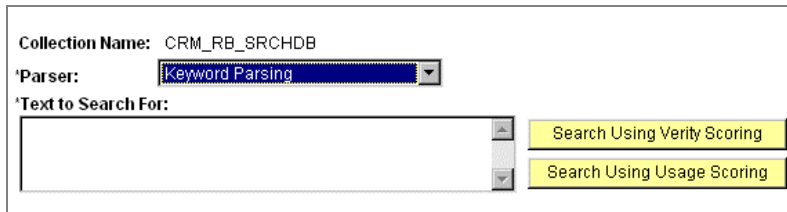
Record (Table) Name	The record name for the index template.
Record Description	The description of the record.
Where Clause Select Criteria	The text of the SQL where clause associated with the record, if any.

Testing the Search Collection Build

The Search Query Test page enables you to test for a search string and determine whether the data being returned is what was expected when you built the collection. It searches across all index template records included in the collection and returns the search results in descending order according to the scoring option that you selected.

Search Query Test Page

Usage	Use the Search Query Test page to enter a search string and retrieve data from the search collection.
Object Name	RB_SEARCH_DEMO
Navigation	Developer Utilities, Define Business Rules, Structure Searches, Use, Search Query Test
Access Requirements	None



Collection Name: CRM_RB_SRCHDB

Parser: keyword Parsing

Text to Search For:

Search Using Verity Scoring

Search Using Usage Scoring

Search Query Test page

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

Parser	Select the parser that you want to use for the query. Valid values are <i>Keyword Parsing</i> , <i>Free Text Parsing</i> , or <i>Query By Example Parsing</i> .
Text to Search For	Enter sample text to search for. If you are testing the keyword parser, enter a keyword string into the field. If you are testing the freetext parser or the query by example parser, enter a natural language string.
Search Using Verity Scoring	Select this button to view the results sorted according to the Verity internal scoring algorithms.
Search Using Usage Scoring	Select this button to view the results after they have been resorted using the usage count and last usage date/time calculations.

Defining Integration for PeopleSoft CRM

PeopleSoft CRM provides many ways of integrating with other PeopleSoft applications as well as third-party systems. PeopleSoft provides a suite of applications that work collaboratively to manage and share data across your enterprise—from managing your customers and workers to tracking your inventory. PeopleSoft CRM uses *enterprise integration points* (EIPs) to communicate between PeopleSoft databases or third-party systems that you are using.

Integrating PeopleSoft Databases

There are a number of ways that you can design your system to integrate between PeopleSoft CRM, Supply Chain Management, and Financials. The simplest way to integrate customer master information is to manage all customer maintenance out of one database and support inquiry only on the other databases. You can then use PeopleTools portal technology to access either system.

However, you may have a compelling business reason to maintain customer and contact information from both databases. You might have reason to allow your front office users to create customers in the PeopleSoft CRM database but want to use receivables payment-processing options that are available only in PeopleSoft Financials. In this case, you'd have payment processing in the Financials database and have the relevant customer and contact information that pertains to payment processing in the Financials database, as well.

If you choose to maintain customer and contact information in both databases, there are additional design, planning, and integration steps that need to be considered:

- Use the Setup Customer ID Owner page to define which database owns the customer ID and contact ID number assignment.

By setting up an owner, the system will be consistent in assigning a unique customer ID for a particular customer across both databases.

- Evaluate whether you plan to define customers as bill to customers in PeopleSoft CRM.

In PeopleSoft Supply Chain Management and Financials, customers that you define as bill to customers must also have a collector and credit analyst defined. You must ensure that PeopleSoft CRM passes these required fields to PeopleSoft Supply Chain Management and Financials. To do this, select the Collector/Credit Analyst Req (collector/credit analyst required) check box on the Installation Setup Table. This ensures that PeopleSoft

CRM satisfies the required field edit needed to populate PeopleSoft Financials and Supply Chain Management.

- Keep the Collector and Credit Analyst table in PeopleSoft CRM in sync with the Collector and Credit Analyst table manually.

There is no EIP to support this synchronization at this time.

- Establish a default value of *DFLT* in PeopleSoft Supply Chain Management and Financials for each setID in the Support Team Code table.

In PeopleSoft Supply Chain Management and Financials, a default support team code is required for each customer. Support team codes are not supported in PeopleSoft CRM in this release. To satisfy the required field edit, PeopleSoft CRM creates a default value of *DFLT* to pass to Supply Chain Management and Financials.

Other Integration Considerations

If you have both PeopleSoft CRM and Supply Chain Management databases, we recommend the following:

- Synchronize your tables (Products, Customer, Contacts, and so on) by performing a full batch publish to the subscribing system by running the full sync EIPs.

Full Synchronization Messages first delete all existing data in the target record and then load a copy of the source record.

- Provide updates to your subscribing system using incremental messages by running sync EIPs.

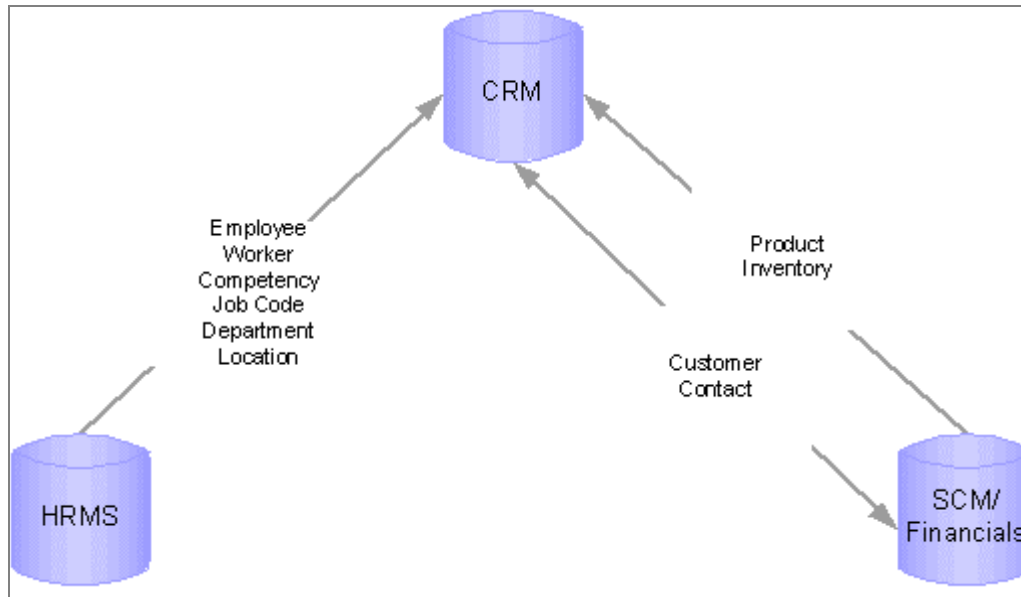
Incremental Synchronization Messages modify, delete, or add only the data that a user has affected in performing an individual transaction.

- Maintain all applications on PeopleSoft Supply Chain Management and publish to CRM.
- Place effective-dated messages in a separate effective-dated message channel.

Note. If your system is the master system of record, it is not recommended to perform a full subscribe on your master files while in production.

PeopleSoft Integration Points to CRM

PeopleSoft CRM works collaboratively with your other PeopleSoft applications to manage and share data across your enterprise. Information such as basic employee, worker, competency, job code, department, and location is passed from PeopleSoft HRMS to your CRM system. If your PeopleSoft CRM system is integrated with PeopleSoft Supply Chain Management or Financials, CRM receives information on product and inventory items. Customer and contact information is passed between CRM and Supply Chain Management and Financials databases.



Integration between PeopleSoft databases

The following table lists which customer features are available between PeopleSoft Supply Chain Management or Financials and CRM.

<i>Supply Chain Management or Financials Page Name</i>	<i>Supply Chain Management or Financials Field Name</i>	<i>PeopleSoft CRM Page Name</i>	<i>PeopleSoft CRM Field Name</i>
General Info	Customer Status	General Information	Customer Status
General Info	Level	General Information	Customer Level
General Info	Date Added	General Information	Date added does not appear on the page, but is stored on the Customer table
General Info	Since	General Information	Customer Since
General Info	Type	General Information	Customer Type
General Info	Name 1	General Information	Name
General Info	Short Name	General Information	Short Name
General Info	Bill To Customer	Roles	Bill To Customer

<i>Supply Chain Management or Financials Page Name</i>	<i>Supply Chain Management or Financials Field Name</i>	<i>PeopleSoft CRM Page Name</i>	<i>PeopleSoft CRM Field Name</i>
General Info	Bill To Selection (link)	Roles	Bill To Selection (link)
General Info	Ship To Customer	Roles	Ship To Customer
General Info	Ship To Selection (link)	Roles	Ship To Selection (link)
General Info	Sold To Customer	Roles	Sold To Customer
General Info	Sold To Selection (link)	Roles	Sold To Selection (link)
General Info	Broker	Roles	Broker
General Info	Indirect Customer	Roles	Indirect Customer
General Info	Correspondence Customer	Roles	Correspondence Customer
General Info	SetID (Correspondence Customer)	General Info	SetID (Correspondence Customer)
General Info	Correspondence Customer ID	General Info	Correspondence Customer ID
General Info	Correspondence Selection (link)	Roles	Correspondence Selection (link)
General Info	Remit From Customer	Roles	Remit From Customer
General Info	SetID (Remit From Customer)	Roles	SetID (Remit From Customer)
General Info	Remit From Customer ID	Roles	Remit From Customer ID
General Info	Remit From Selection (link)	Roles	Remit From Selection(link)
General Info	Corporate Customer	Roles	Corporate Customer

Supply Chain Management or Financials Page Name	Supply Chain Management or Financials Field Name	PeopleSoft CRM Page Name	PeopleSoft CRM Field Name
General Info	SetID (Corporate Customer)	Roles	SetID (Corporate Customer)
General Info	Corporate Customer ID	Roles	Corporate Customer ID
General Info	Corporate Selection (link)	Roles	Corporate Selection (link)
General Info	Consolidation Customer	Roles	<i>Not available</i>
General Info	Consolidation Business Unit	Roles	<i>Not available</i>
General Info	Go To	<i>Not available</i>	<i>Not available</i>
Miscellaneous General Info	Website URL	General Information	Website URL
Miscellaneous General Info	Website URL (link)	General Information	Website URL (link)
Miscellaneous General Info	Stock Symbol	General Information	Stock Symbol
Miscellaneous General Info	Stock Symbol (link)	<i>Not available</i>	<i>Not available</i>
Miscellaneous General Info	Currency Code	General Information	Currency Code
Miscellaneous General Info	Rate Type	General Information	Rate Type
Miscellaneous General Info	Stock Symbol	General Information	Stock Symbol
Miscellaneous General Info	Support Team Code	<i>Not available</i>	<i>Not available</i>
Miscellaneous General Info	Default (Support Team Code)	<i>Not available</i>	<i>Not available</i>
Bill To Selection	<i>All Fields</i>	Bill To Selection	<i>All Fields</i>
Ship To Selection	<i>All Fields</i>	Ship To Selection	<i>All Fields</i>
Sold To Selection	<i>All Fields</i>	Sold To Selection	<i>All Fields</i>
Correspondence Selection	<i>All Fields</i>	Correspondence Selection	<i>All Fields</i>
Remit From Selection	<i>All Fields</i>	Remit From Selection	<i>All Fields</i>
Corporate Customer Selection	<i>All Fields</i>	Corporate Customer Selection	<i>All Fields</i>
Bill To Options	Collector	Bill To Options	Collector
Bill To Options	Credit Analyst	Bill To Options	Credit Analyst
Bill To Options	<i>All remaining fields</i>	Bill To Options*	<i>All remaining fields</i>

Supply Chain Management or Financials Page Name	Supply Chain Management or Financials Field Name	PeopleSoft CRM Page Name	PeopleSoft CRM Field Name
Ship To Options	<i>All fields</i>	Ship To Options*	<i>All Fields</i>
Sold To Options	<i>All fields</i>	Sold To Options*	<i>All fields</i>
Correspondence Options 1	<i>All Fields</i>	Correspondence Options 1 *	<i>All Fields</i>
Correspondence Options 2	<i>All Fields</i>	Correspondence Options 2*	<i>All Fields</i>
Address	Location	Address	Address Seq
Address	<i>Not available</i>	Address	Address ID
Address	Descr	Address	Descr
Address	Bill To (address)	Address	Bill To (address)
Address	Primary (Bill To address)	Address	Primary (Bill To address)
Address	Ship To (address)	Address	Ship To (address)
Address	Primary (Ship To address)	Address	Primary (Ship To address)
Address	Sold To (address)	Address	Sold To (address)
Address	Primary (Sold To address)	Address	Primary (Sold To address)
Address	Broker (address)	Address	Broker (address)
Address	Primary (Broker address)	Address	Primary (Broker address)
Address	Indirect (address)	Address	Indirect (address)
Address	Primary (Indirect address)	Address	Primary (Indirect address)
Address	Eff Date	Address	Eff Date
Address	Status	Address	Status
Address	Language Code	Address	Not available
Address	Tax Code	Address	Not available
Address	Country	Address	Country

Supply Chain Management or Financials Page Name	Supply Chain Management or Financials Field Name	PeopleSoft CRM Page Name	PeopleSoft CRM Field Name
Address	Address 1	Address	Address 1
Address	Address 2	Address	Address 2
Address	Address 3	Address	Address 3
Address	Address 4	Address	Address 4
Address	City	Address	City
Address	State	Address	State
Address	Postal	Address	Postal
Address	GeoCode	Address	<i>Not available</i>
Address	In City Limit	Address	<i>Not available</i>
Address	Alternate Names	Address	<i>Not available</i>
Address	View Phone Information	Address	Phone
Additional General Info	Tax ID	Define General Options	Taxpayer ID
<i>Not Available</i>	<i>Not Available</i>	Define General Options	Industry ID
<i>Not Available</i>	<i>Not Available</i>	Define General Options	Type
<i>Not Available</i>	<i>Not Available</i>	Define General Options	Ownership
<i>Not Available</i>	<i>Not Available</i>	Define General Options	Employee Total
<i>Not Available</i>	<i>Not Available</i>	Define General Options	Revenue Generated
<i>Not Available</i>	<i>Not Available</i>	Site	<i>All fields</i>

*Display-only in PeopleSoft CRM

Managing Integration Points

PeopleSoft CRM offers many ways of integrating with third-party applications that might provide specialized functionality extending the capabilities of the PeopleSoft system. For example, if you send or publish a message to a third-party system, the PeopleSoft system structures the data into a message and automatically delivers it to the destination location. You can also accept or subscribe to messages from third-party systems. The PeopleSoft system validates incoming data, checking for errors before updating the system of record.

You can also send a synchronous request/reply transaction to a third-party system for processing and receive a real-time response.

For more information about setting up integration through the pages associated with the Maintain Integration Utilities menu, see *PeopleSoft Enterprise Integration PeopleBook*.

EIPs Used Between PeopleSoft CRM and HRMS

When you are integrating your PeopleSoft CRM installation with a PeopleSoft HRMS system or another third-party human resources system, use the following three EIP groups: Person Basic, Workforce, and Person Competencies. Each of these EIP groups requires additional supporting EIPs to be run, and must be processed in a particular sequence. (For example, Location and Department EIPs must be run, as well.)

You should be performing the fullsync messages only once at implementation time.

To set up your database with fullsync messages

1. Run Person Basic EIP group.
2. Run Workforce EIP group.
3. Run Person Competencies EIP group.
4. After these EIPs have run successfully, inactivate the fullsync messages and activate the corresponding sync messages.

Sync messages always originate in PeopleSoft HRMS or a third-party system and publish to PeopleSoft CRM. Because of that, any field in PeopleSoft CRM that is populated by an EIP must be maintained from the originating source database whether it is PeopleSoft HRMS or a third-party system.

You can create workers in PeopleSoft CRM that are not maintained by your PeopleSoft HRMS or third-party system. The EIPs originating in PeopleSoft HRMS will not interact with the workers defined in PeopleSoft CRM, and you must maintain these workers in CRM until they are created in your HRMS or third-party database.

For more information about running EIP groups, see *PeopleSoft Enterprise Integration PeopleBook*.

Name	EIPs Used in PeopleSoft CRM and HRMS	Additional Information
Person Basic Fullsync Inbound	PERSON_BASIC_FULLSYNC	<p>This will purge worker (persons who are internal contacts) data out of the Person and Worker tables before applying the new data. The purge is performed only if a header message is received.</p> <p>For the following worker attributes, only a subset of data is subscribed to:</p>

Name	EIPs Used in PeopleSoft CRM and HRMS	Additional Information
		<ul style="list-style-type: none"> For a worker's physical address, PeopleSoft CRM subscribes only to addresses with the address type <i>Mailing</i>. For a worker's email address, PeopleSoft CRM subscribes only to email addresses with email type <i>Business</i>. For a worker's phone number, PeopleSoft CRM subscribes only to phone numbers with phone type <i>Business</i>, <i>Cellular</i>, <i>FAX</i>, <i>Pager 1</i>, <i>Pager 2</i>, and <i>Telex</i>.
Workforce Fullsync Inbound	WORKFORCE_FULLSYNC	<p>This will purge data out of the PeopleSoft HRMS Employee and Job tables in PeopleSoft CRM before applying the new data. The purge is performed only if a header message is received.</p> <p>PeopleSoft CRM subscribes only to the primary job information for the current effective row for the worker. All fields in the Worker component are updated from PeopleSoft HRMS with the exception of the Physical Location field.</p>
Person Competency Fullsync Inbound	PERSON_COMPETENCY_FULLSYNC	This will purge data out of the worker evaluations and worker competencies tables (worker evaluations is not displayed in PeopleSoft CRM) before applying the new data. The purge is performed only if a header message is received.
Person Basic Sync Inbound	PERSON_BASIC_SYNC	You provide updates to PeopleSoft CRM by using the sync version of the Person Basic group of EIPs.
Workforce Sync Inbound	WORKFORCE_SYNC	You provide updates to PeopleSoft CRM by using the sync version of the Worker group of EIPs.
Person Competency Sync Inbound	PERSON_COMPETENCY_SYNC	You provide updates to PeopleSoft CRM by using the sync version of the Person Competency group of EIPs.

EIPs Used by the Customer Component

The system uses the Customer and Contact EIP groups to manage integration between PeopleSoft CRM and other PeopleSoft applications or third-party products. When you use the full sync message, it is important that the CUSTOMER_FULLSYNC be run before CONTACT_FULLSYNC.

There are additional prerequisites and supporting EIPs that must be run before you run the Customer Fullsync and the Contact Fullsync message. **For more information** about these EIP requirements, see *PeopleSoft Enterprise Integration PeopleBook*.

Name	EIPs Used	Additional Information
Customer Fullsync Inbound	CUSTOMER_FULLSYNC (Both)	This will purge all data from the tables before applying the new data. The purge is performed only if a header message is received.
Contact Fullsync Inbound	CONTACT_FULLSYNC (On SCM or Financials publishing side only) CONTACT_FULLSYNC_EFF (Both)	When interfacing with PeopleSoft CRM, the effective-dated message must be used due to differences in data models. For the publishing database, the CONTACT_FULLSYNC message is used to create the initial message, which is then passed to the effective-date logic to put all future rows in the application message staging table and send only the current information to PeopleSoft CRM.
Customer Fullsync Outbound	CUSTOMER_FULLSYNC (Both)	Same as inbound.
Contact Fullsync Outbound	CONTACT_FULLSYNC (Both)	When publishing to PeopleSoft Supply Chain Management or Financials from CRM, the regular message must be used.
Customer Sync Inbound	CUSTOMER_SYNC (Both)	
Contact sync Inbound	CONTACT_SYNC (On SCM or Financials publishing side only) CONTACT_SYNC_EFF (Both)	As with Fullsync, the incremental sync message must also only send the current data into PeopleSoft CRM.
Customer Sync Outbound	CUSTOMER_SYNC (Both)	
Contact Sync Outbound	CONTACT_SYNC (Both)	When interfacing with PeopleSoft Supply Chain Management from CRM, the regular message must be used.

PeopleSoft SCM and Financials Customer-Related Pages Not Available in PeopleSoft CRM

The following pages found in the PeopleSoft Supply Chain Management or PeopleSoft Financials Customer component are not available in PeopleSoft CRM. If your CRM installation is integrated with either PeopleSoft Supply Chain Management or PeopleSoft Financials, you can access these pages through those applications.

- Vendor Info page
- Credit Profile - General page
- Credit Profile - Credit Check page
- Region Code Info page
- Subcustomer Info page
- Customer Group Info page
- Tax Exempt Certificate Info page
- Customer VAT Info page
- Customer Notes Info page
- Attachments page
- Messages page
- User-Defined 1 page
- User-Defined 2 page
- Payment Options
- Write-Off Info page
- Hierarchy page
- Product Catalog page
- Product Aliases page
- Additional Ship To Options page
- Ship Exception Dates page
- Carrier Acct Number page

PeopleSoft Supply Chain Management and Financials Product-Related Pages Not Available in PeopleSoft CRM

The following are customer components that are used by the Products component in PeopleSoft Supply Chain Management and PeopleSoft Financials. These components are not

available in PeopleSoft CRM. If your PeopleSoft CRM installation is integrated with either PeopleSoft Supply Chain Management or PeopleSoft Financials, you can access these pages through those applications.

- Dun & Bradstreet
- MICR Information
- Corporate Customer Tree
- Vendor Information
- Corporate Tree Messages
- Customer EFT Name
- Quick Customer Create

Setting Up a Customer Owner ID

When more than one PeopleSoft database is used, it is necessary to ensure that the data that is shared between the databases is not in conflict. If your PeopleSoft CRM system is integrated with PeopleSoft Supply Chain Management or Financials, you must decide which database will assign the customer IDs and contact IDs. The PeopleSoft Supply Chain Management and Financials Customer component and the PeopleSoft CRM Customer component use the same ID assignment to ensure solid integration between the two databases. Under no circumstances should each database assign an identifier that is already in use in other databases. To deal with this problem, we introduce the concept of remote data access.

In a system of multiple databases where integrity must be guaranteed, one database must be labeled as the master database. This master database is responsible for issuing identifiers upon request from any of the non-master databases. (The phrase *master database* is used only in reference to issuing identifiers and is not intended to imply that there is a parent/child relationship between it and the other databases in your PeopleSoft installation.)

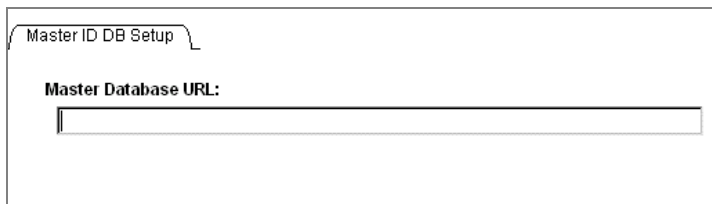
The setup of the master database is done on all of the non-master databases in the PeopleSoft system. To designate which system will assign the IDs, use the Setup Customer Owner ID page.

Note. The Setup Customer Owner ID page is where you indicate the location of the master database that is responsible for issuing identifiers for customers and contacts. This *must* be done on all databases in the community except the master. Failure to do so may result in duplicate customer and contact identifiers.

When an application must obtain an identifier, it checks the Master Database URL field to see if there is a value. If there is no value in the field, then the system issues the identifier itself, because it is assumed that the database is the master. If a value is found in the field, the system contacts the remote master database for the identifier.

Master ID DB Setup Page

Usage	Use the Master ID DB Setup (master ID database setup) page to designate which system is the master database for defining customer IDs.
Object Name	RB_IDMASTER
Navigation	Define Integration Rules, Define Remote Data Access, Setup, Setup Customer ID Owner
Prerequisites	Your PeopleSoft CRM installation must be integrated with PeopleSoft FDM.
Access Requirements	None



Master ID DB Setup

Master Database URL

Enter the database URL for the master database—that is, the database that assigns customer IDs. A sample URL of how this would be set up on the non-master databases would be as follows:

`http://machine/servlets/xmllink/peoplesoft8/`

You must replace *machine* with the server name where an application server is running that is connected to the master database. The *peoplesoft8* directory might also need to be changed depending on where the application server was installed.

Troubleshooting

If you are having trouble obtaining remote identifiers for your PeopleSoft system, there are several basic steps that you can follow to discover where the problem might be. The first thing to do is make sure that the application server that your system is pointing to is running. Next, check the Customer Owner ID page on the master database and make sure that the Master Database URL field is clear—only the non-master databases should have a value entered in that field.

Because all calls to the remote system request a service called GetID, you might need to check that the PeopleTools pages are set up correctly. Check the XML Link Function Registry in PeopleTools to ensure that you have the correct information set up on the page. The information in the page calls the function IScript_GetID in WEBLIB_RB. Any user issuing this type of a call must have permissions set to allow access to this function. In PeopleTools Maintain Security, you must check the Permissions Lists page for Web Libraries. From the

Web Libraries page, click the Edit button for the required library WEBLIB_RB to make sure that access has been granted for the permission list that you are querying.

Finally, you can use the Test XML Catcher page to test calls between the databases.

Test XML Catcher Page

Usage	Use the Test XML Catcher page to test calls between remote databases.
Object Name	RB_XML_TEST
Navigation	Define Integration Rules, Define Remote Data Access, Setup, Test XML Catcher
Access Requirements	None

Test XML Catcher page

After you enter the transaction number that you are testing and navigate out of the field, the system displays some default values for the parameter fields. These fields may differ from each other depending on the transaction number.

Click the refresh button to display any errors in the text box at the bottom of the page. The system returns a general message (for example, connection error or OK), the number returned from the remote system, and the transaction number that was executed. When you enter a test transaction number, the system automatically populates the parameter fields with sample data for the transaction.

Transaction	Description
99	Count the number of rows in the remote AUTO_NUM_TBL. This is a basic connectivity test.
98	Read back the number that would be assigned next from the auto_num_tbl given the keys entered in the parameter list. A sample transaction would have the

Transaction	Description
	following parameters: SHARE (SetID), CUST (num type), 000 (begin sequence).
1	Read back and update AUTO_NUM_TBL for the CUST (num type for customer) default entry. Parameters are SetID, auto field, and zero pad.
2	Read back and update AUTO_NUM_TBL for the CID (num type for contact) default entry. Parameters are SetID, auto field, and zero pad.

Processing Business Interlink Transactions

Sometimes PeopleSoft CRM must call an external system vendor's application to request information. This information must be provided in a real-time, synchronous mode. The PeopleSoft application waits for the answer from the other application before the PeopleSoft application can continue processing.

These transactions use PeopleSoft Business Interlink definitions to specify the data passed to this external system, as well as define the outputs to be received from the external system. The data that is passed from the Interlink object is interpreted by an Interlink plug-in, which then contacts the external system, passes the data in the correct form, retrieves the data, then passes it, in the correct form, back to the Interlink object.

For more information about Business Interlinks, see *PeopleTools Business Interlink Application Developer Guide PeopleBook*.

EIP	Object Name	PeopleSoft CRM Application	Reference
Credit Card Authorize, Bill and Credit	CREDITCARD_TRANSAC TION, CREDITCARD_TRANSAC TION_C	Support	<i>PeopleSoft CRM Support and PeopleSoft CRM HelpDesk</i>
Get PO IUT	GET_PO_IUT	FieldService	<i>PeopleSoft CRM FieldService PeopleBook</i>
Item Balance	RF_IN_ITEM_BALANCES	FieldService	<i>PeopleSoft CRM FieldService PeopleBook</i>
Order Status	OM_ORDER_STATUS	Order Management	<i>PeopleSoft CRM Sales PeopleBook</i>
Product Availability	OM_PROD_AVAILABILITY	Order Management	<i>PeopleSoft CRM Sales PeopleBook</i>

Processing Inbound Application Message Transactions

Third-party systems can send PeopleSoft applications information using a number of integration points established throughout the system. Depending on the application, various technologies provide multiple options for interfacing to PeopleSoft. Each option provides audit trails, validations, and error handling to insure that data integrity is maintained within the PeopleSoft database.

Understanding the Inbound Transaction Architecture

Depending on the requirements of the interfacing system and the integration point within PeopleSoft, various technologies are used to receive transactions into the PeopleSoft system.

Application Message-Based Transaction

PeopleSoft Application Messaging functionality provides a method for asynchronous communications between external systems and PeopleSoft applications using industry standard XML-formatted messages. Application messages are automatically loaded into the PeopleSoft system using subscription processes that are unique to each message type. You can view all transactions in the transaction log and access the detail pages that enable you to correct transaction errors. Most subscription processes load message information into staging tables where background programs validate and process individual transactions within the message.

The Inbound File Publish utility, which utilizes the File Layout Object tool, may also be used to automatically convert flat file input to XML-based application messages.

For more information about application messaging, see *PeopleTools Application Messaging PeopleBook*. **For more information** about the File Publish Utility, see the PeopleSoft Enterprise Integration PeopleBook. **For more information** about individual transactions, see Using the EIP Catalog in *PeopleSoft Enterprise Integration PeopleBook*.

Validations, Error Handling, and Database Updates

Most inbound transactions, no matter which technology delivers them to the PeopleSoft system, are loaded into staging tables where they are validated by background routines scanning these transaction logs awaiting incoming work. If errors are found, the transaction's status in the transaction log is changed to *Error* and rows are inserted into error tables for each error message.

Error messages are displayed on the Transaction Maintenance page for transactional type data such as inventory adjustments and purchase order receipts. For definitional-type data such as item master and bill of materials, the Data Definition page is used to review and revise the erroneous information.

For more information about error handling, see [Using Transaction Maintenance](#) or [Using Data Definition Maintenance](#).

Once you have revised the information and saved the page the transaction is ready to be reprocessed.

Some transactions provide functionality to immediately validate and update application tables from subscription processes. The Consumer and Par Location Count transactions both attempt to update the application tables but, if errors are found, write the data to the error tables so corrections can be made.

Using Transaction Maintenance

Use the Transaction Maintenance page to view all transaction-based information in the transaction log. Detail pages for each transaction type, accessible from the Transaction Maintenance page, provide error messages and transaction details and allow you to revise fields containing errors.

For more information about how inbound transactions are processed through the PeopleSoft system, see [Understanding the Inbound Transaction Architecture](#).

Transaction Maintenance Page


Usage	Use the Transaction Maintenance page to view all electronic transactions in the transaction log and access the detail pages that enable you to correct transaction errors.
Object Name	BCT_CTL_UPD
Navigation	Manage Data Exchanges, Process Inbound Transactions, Use, Transaction Maintenance
Prerequisites	You must have processed an inbound transaction.

Transaction Maintenance

*Unit:

Transaction:

Status:



Transaction Details

[Find](#) | [View All](#) First [Last](#)

Status

Source

EIP Control ID	Trans Code	Description	*Status	Error	Date/Time	User	From
30000000000000470000000001	0211	Prdn Sched Compl/Scrap Stock	Complete	0	07/06/2000 2:05PM	DVP1	Page
30000000000000480000000001	2301	Production Component Issue	Complete	0	07/06/2000 2:37PM	DVP1	Auto Gen
30000000000000530000000001	2301	Production Component Issue	Complete	0	07/07/2000 10:44AM	DVP1	Auto Gen
30000000000000540000000001	2301	Production Component Issue	Complete	0	07/07/2000 1:19PM	DVP1	Auto Gen
30000000000000550000000001	2301	Production Component Issue	Complete	0	07/10/2000 8:44AM	DVP1	Auto Gen
30000000000000560000000001	2301	Production Component Issue	Complete	0	07/10/2000 8:49AM	DVP1	Auto Gen
30000000000000570000000001	2301	Production Component Issue	Complete	0	07/10/2000 9:16AM	DVP1	Auto Gen

Transaction Maintenance page: Status tab

Select the Business **Unit** of the transaction log that you want to view. You can retrieve transaction records by **Transaction** and **Status**. Leave these fields blank to display all the records in the transaction log.

If you are retrieving records by **Transaction**, select one of the following transaction options:

If you are retrieving records by **Status**, select one of the following options:

Complete

If all rows for the transaction are either canceled or successfully processed, the status of the transaction record is set to **Complete**.

Confirmed

The transaction is confirmed for purging.

Error

If a data validation error occurs during processing, the status of the transaction record is set to **Error**.

In Process

When processing of a transaction is initiated, the status of the transaction record is set to **In Process**.

Incomplete

An **Incomplete** transaction is a transaction that is still being created by the transaction pages. The status will change to **New** when the transaction is ready to be processed by the background processes. The system will not process an incomplete transaction.

New

The status of a transaction record is set to **New** when it is first written to the transaction log.

Reprocess

When you correct errors using the Transaction Maintenance Detail pages, the status of the transaction record is set to **Reprocess**.

Click the **Search** button to populate the page with the transactions that match your criteria.

The system displays the **Transaction Details** for each transaction record.

You can select the **EIP Control ID** to view the transaction line details for the transaction. The system displays the **Trans Code** (transaction code), which identifies the transaction type, and the transaction **Description**.

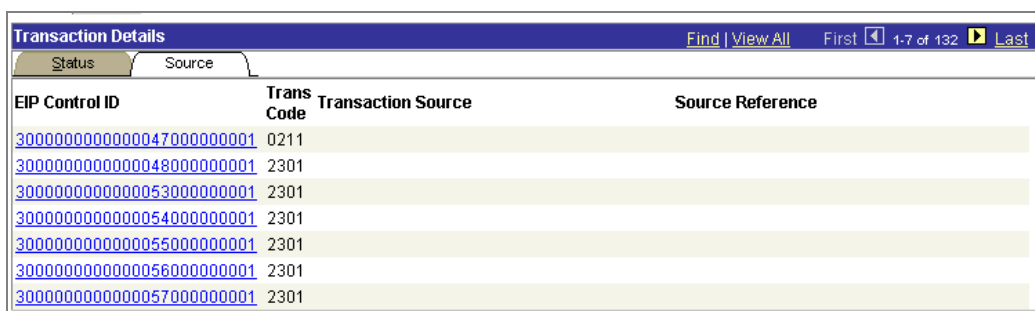
You can modify the transaction **Status** here or in the Transaction Maintenance Detail pages. The rules for changing a transaction status are as follows.

Current Status	Change to Status
<i>New</i>	<i>Complete</i> (Cancels all the lines in the transaction.)
<i>Error</i>	<i>Complete</i> (Cancels all the lines in the transaction.) <i>Reprocess</i>
<i>Complete</i>	Can't be changed
<i>In Process</i>	Can't be changed
<i>Reprocess</i>	<i>Complete</i> (Cancels all the lines in the transaction.)
<i>Incomplete</i>	Can't be changed

The system displays the number of errors found when the transaction was processed. The system automatically generates the **Date/Time** (date and time) that the transaction was created. You can view the **User ID** of the operator who entered the transaction data.

The source of the transaction is indicated in the **From** field. You can enter transactions into the transaction log through a transaction page, a batch upload process, the Message Agent, Application Message, or as automatically generated results of internal PeopleSoft processes.

Source Tab



Transaction Details			
Find View All		First	1-7 of 132 Last
EIP Control ID	Trans Code	Transaction Source	Source Reference
300000000000000047000000001	0211		
300000000000000048000000001	2301		
300000000000000053000000001	2301		
300000000000000054000000001	2301		
300000000000000055000000001	2301		
300000000000000056000000001	2301		
300000000000000057000000001	2301		

Transaction Maintenance page: Source tab

For each **EIP Control ID**, you can view the **Trans Code** (transaction code), **Transaction Source**, and **Source Reference**.

You can select the **EIP Control ID** to view the transaction line details for the transaction. If the transaction's status is *New*, *Error*, or *Reprocess*, you can modify this data. Each transaction type has a unique page layout enabling revisions to transaction-specific information. The operation of each of the transaction detail pages is similar. The following example provides an explanation of the common features between the different detail pages.

Using Data Definition Maintenance

Use the Data Def Maint (data definition maintenance) page to view data definition transactions in the transaction logs. Detail pages for each transaction type, accessible from the Data Def Maint page, provide error messages and transaction details and allow you to revise fields containing errors.

For more information about how inbound transactions are processed through the PeopleSoft system see Understanding the Inbound Transaction Architecture.

Data Def Maint page

Usage	Use the Data Def Maint (data definition maintenance) page to view data detail or correct errors for subscribe messages that contain data rather than transactions.
Object Name	EO_EIP_CTL_MAINT
Navigation	Manage Data Exchanges, Process Inbound Transactions, Use, Data Definition Maintenance
Prerequisites	You must have processed an inbound data definition transaction.
Access Requirements	Click the Detail button next to the transaction that you want to view.

Data Def Maint

Transaction Type:

☐ Queue Based

☒ Stage Table Status: Reference:

View All First 1-6 of 42 Last

Stage Data	Publish Data	Date Time				
Status	Error Count	EIP Control ID	TransactionType	Description	User	Reference
1 [Erro]		17655262916959130000000001	BOM	Bill Of Material	DVP1	GR8300
2 [Erro]		17116916409802540000000001	BOM	Bill Of Material	DVP1	GR8300
3 [Erro]		15691702017273470000000001	BOM	Bill Of Material	DVP1	GR8300
4 [Con]		15455793939024010000000001	BOM	Bill Of Material	DVP1	GR8300
5 [Erro]		13516342661824390000000001	BOM	Bill Of Material	DVP1	GR8300
6 [Erro]		17254860072634050000000001	BOM	Bill Of Material	DVP1	GR8300

Data Def Maint page

Processing Outbound Application Messages

Outbound EIPs exist throughout the PeopleSoft system providing interface points for third-party applications requiring information as activity occurs within the PeopleSoft system. PeopleSoft Application Messaging technology is utilized to format and publish industry

standard XML messages. For example, as item master information is entered into PeopleSoft applications, the system generates XML-based messages and delivers them to third-party systems requiring this information to set up their own item master tables.

For more information about application messaging, see *PeopleTools Application Messaging PeopleBook*.

Understanding the Outbound Transaction Architecture

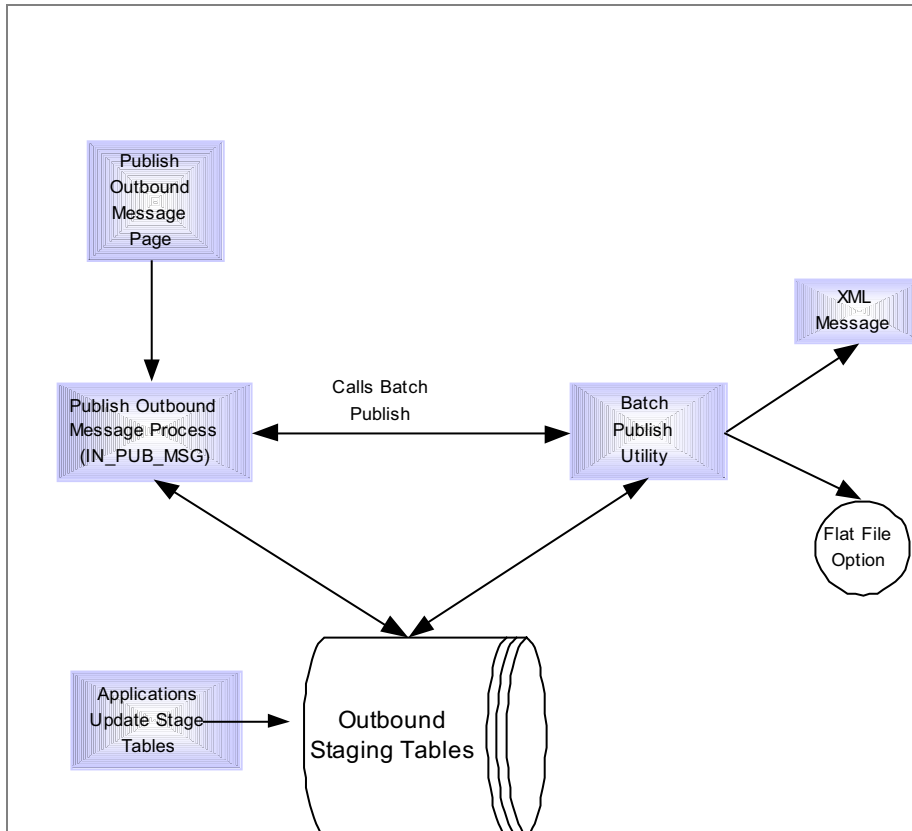
PeopleSoft CRM applications as well as interfacing third-party systems have various processing and timing requirements that dictate when information can be generated or received. For this reason, the integration points provided by PeopleSoft utilize a number of different approaches when generating outbound application messages.

For example, a third-party system requiring item master information from the PeopleSoft Inventory application may want immediate incremental updates as information is changed online or may want periodic updates on a nightly or weekly basis. The Item Master EIP provides both options, giving the third-party system the choice as to how to receive this information.

Component or Incremental Publish

Component-published messages are generated immediately upon saving a component in various PeopleSoft applications. Components used to maintain setup type information such as items or customers utilize the Component Publish approach.

Batch Publish



Batch Publish process flow

Batch Publish messages provide the functionality to group many similar transactions into a single message.

Background processes that work on batches of transactions at one time utilize this approach.

In addition, other processes use this approach where interface requirements demand various groupings of similar transactions based on common information within each transaction. For example, an Advanced Shipping Notice message can be published to a customer when their order is shipped within the PeopleSoft Inventory system. This message might go directly to the customer or it might go through third-party software that converts the XML message to one of the industry standard EDI formats such as X.12 before passing it on to the customer. Using the options available with the Batch Publish approach, the user can dictate whether to create a single message for all customers to send to the third-party software or to create individual messages to send directly to each customer.

All PeopleSoft CRM applications use the Publish Outbound Message process to initiate the Batch Publish messages. Built into this routine is the Batch Publish utility, a PeopleSoft tool that provides the functionality to group and filter or “chunk” messages as described in the previous example.

The Batch Publish utility also provides the option to create flat files instead of XML messages when File Layout Objects exist for transactions being generated. The File Layout Objects are

easy to modify and PeopleSoft provides examples for all transactions included in the Electronic Data Interchange (EDI) feature.

Full Data Replication

Full data replication is the process used to seed, or initially populate or repopulate, a copy of an entire table onto a remote database or legacy system. The entire contents of the table are published to all systems that require a copy of the table. Generally, full data replication occurs with setup tables, that is, relatively static, low volume tables keyed by SetID.

Once a copy of the table exists, incremental updates provide a mechanism or process to keep the copy up-to-date with changes made on the master. Incremental updates occur most often with transaction tables, that is, frequently updated tables keyed by business unit.

Most full data replication message names end in _FULLSYNC.

Using Outbound Transactions

Outbound transactions are entered into staging tables. The outbound publish process takes the information from the staging tables and creates messages.

Setting Up Chunking

If you are publishing application messages, you might want to set up chunking. When chunking, the system automatically breaks up messages into several smaller messages based on the values in one or more of the fields in the level zero record. For example, if you want to chunk by business unit, the message splits up all transactions by business unit and sends each business unit's transactions to a node that you have defined.

You can use the following pages to establish chunking for your messages:

- Map Node to Chunk Rule page
- Manage ChunkRule BU Mapping page
- Map BU to ChunkRule/Node
- Map ChunkRule/Node to BU
- Manage ChunkRuleSetID Mapping page
- Map SetID to ChunkRule/Node page
- Map ChunkRule/Node to SetID page

For more information about activating application messages, see Setting Up Application Messaging EIPs in *PeopleSoft Enterprise Integration PeopleBook*.

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