
PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook

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PeopleSoft Enterprise Customer Relationship Management Application Fundamentals Preface

This preface discusses:

- PeopleSoft Enterprise Customer Relationship Management (CRM) business object management.
- PeopleSoft Enterprise CRM product and item management.
- PeopleSoft Enterprise CRM automation and configuration tools.
- PeopleSoft Enterprise CRM services foundation.
- PeopleTools PeopleBooks.

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

PeopleSoft Enterprise CRM Business Object Management

The *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft CRM.

The *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook* has these parts:

- Business Object Management Basics.

This part provides an overview of the business object relationship model and discusses setting up role types, relationship types, and control values.

- Data Management for Organization Business Objects.

This part discusses how to set up and manage companies, sites, and partner companies.

- Data management for Individual Business Objects.

This part discusses how to set up and manage persons, including contacts and consumers, and workers.

- Business Object Management.

This part discusses how to define and use business object searches, quick create, and the customer identification framework to manage business objects.

- Customer and Worker Data Integrations.

This part discusses how to integrate customer and worker data with other systems.

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Getting Started"

PeopleSoft Enterprise CRM Product and Item Management

The *PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook* discusses how to set up products in PeopleSoft CRM, including installed products, product packages, and products that are service offerings such as service agreements and warranties.

See Also

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "PeopleSoft Enterprise CRM Product and Item Management Preface"

PeopleSoft Enterprise CRM Automation and Configuration Tools

The *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple PeopleSoft CRM applications. This is an essential companion to the *PeopleSoft CRM Application Fundamentals PeopleBook*.

The *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook* contains these parts:

- Correspondence Management.

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

- Automation Tools.

This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (AAF), and scripts.

- Configuration Tools.

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

- Knowledge management.

This part discusses the setup of Verity search.

- Business process management.

This part provides information on the two different approaches to manage business processes in PeopleSoft CRM and discusses:

- The setup of the BPEL infrastructure to initiate and manage BPEL process instances.
- The setup of Business Process Monitor to view the status information of initiated BPEL process instances.
- The setup of BPEL worklist integration to send CRM worklist entries (both notifications and action items) from BPEL processes.
- The setup and execution of business projects.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "PeopleSoft CRM Automation and Configuration Tools Preface"

PeopleSoft Enterprise CRM Services Foundation

The *PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook* discusses configuration options that are common to PeopleSoft Integrated FieldService and the PeopleSoft call center applications (PeopleSoft Support, Service Center for Higher Education, HelpDesk, and HelpDesk for Human Resources).

The *PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook* contains these parts:

- Solution Management.

Solution management enables users to establish a set of predefined solutions that can be used by call center agents and field service technicians to resolve customer problems.

- Environmental Systems Research Institute (ESRI) integration.

The integration with ESRI, a mapping software, enables users to view the location of reported cases and the location of field service activity through Map Dashboard.

- Transaction Billing Processor Integration

PeopleSoft Enterprise Integrated FieldService, PeopleSoft Enterprise Order Capture, and PeopleSoft Enterprise CRM Call Center applications can integrate with the Transaction Billing Processor or any third-party billing applications to send agreement, service order, case fees, order capture service and product agreement information to the Transaction Billing Processor. You can also generate invoices for services, cases and agreement fees, and manage and book revenue to the appropriate general ledger accounts for recurring and one-time purchases of services and products.

See Also

PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook, "PeopleSoft CRM Services Foundation Preface"

PeopleTools PeopleBooks

Cross-references to Enterprise PeopleTools documentation refer to the Enterprise PeopleTools 8.50 PeopleBooks.

PeopleBooks and the Online PeopleSoft Library

A companion PeopleBook called PeopleBooks and the Online PeopleSoft Library contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the PeopleSoft online library including full-text searching and configuring a reverse proxy server.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Glossary of useful PeopleSoft terms that are used in PeopleBooks.

You can find this companion PeopleBook in your PeopleSoft online library.

Part 1

Getting Started

Chapter 1

Getting Started with PeopleSoft Enterprise Customer Relationship Management 9.1 Applications

Chapter 1

Getting Started with PeopleSoft Enterprise Customer Relationship Management 9.1 Applications

This chapter provides an overview of PeopleSoft Enterprise Customer Relationship Management (PeopleSoft CRM) and discusses:

- PeopleSoft CRM cross-product integrations.
- PeopleSoft CRM cross-product implementation.

PeopleSoft Enterprise CRM 9.1 Application Fundamentals Overview

This book contains essential information describing the setup and design of PeopleSoft CRM and the use of features that are common to multiple applications within PeopleSoft CRM, including information on:

- Setting up installation, basic system tables, and security options.
- Setting up and using features that are common to multiple PeopleSoft CRM applications, such as notes, search collections, alternate character, interactive reports, and diagnostic reports.
- Administering worker information.
- Setting up and using interactions and 360-degree views.
- Setting up and using self-service applications.
- Managing relationships with customers.
- Setting up agreements and warranties.
- Managing the portfolio of products that you offer.

Note. This book documents the mechanics of setting up and using common PeopleSoft CRM functionality. The use of that functionality within a business process, such as order capture or support, is discussed in the application PeopleBook.

PeopleSoft Enterprise CRM 9.1 Cross-Product Integrations

PeopleSoft CRM applications integrate with each other and with other external systems. Application-specific integrations are discussed in the application-specific PeopleBooks. The following integrations apply to multiple products:

- Integration with PeopleSoft Human Capital Management or other similar systems enables you to synchronize CRM employee records with the system of record for human resources data.
- Integration with Oracle E-Business Human Resources Management or other similar systems enables you to synchronize CRM employee records with the system of record for human resources data. CRM HelpDesk for Human Resources now offers integration with E-Business Human Resources Management.
- Integration with PeopleSoft Supply Chain Management (SCM) or other similar systems enables you to synchronize customer and product data across systems, which enables many transactions within PeopleSoft CRM, such as manage materials in PeopleSoft Integrated FieldService and PeopleSoft Support and order taking and tracking in PeopleSoft Order Capture.
- Integration with PeopleSoft SCM and Financial Management Solutions enables you to display billing information and payment information that is associated with customers in the PeopleSoft CRM 360-Degree View.
- Integration with the PeopleSoft business analysis modeler enables you to view realtime multidimensional interactive reports that help you analyze and monitor the key performance indicators in your enterprise.
- Integrations that enable the PeopleSoft CRM system to exchange customers with personal information managers such as Microsoft Outlook or Lotus Notes.
- The Credit Card EIP (enterprise integration point) enables you to integrate with third-party credit card authorization and payment vendors in PeopleSoft Support and the PeopleSoft collaborative selling applications.

Refer to the implementation chapters in this PeopleBook for detailed information.

PeopleSoft Enterprise CRM 9.1 Applications Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks based on the features that you are implementing. Setup tasks include:

- A list of components that you must set up.

This list is the order in which you must setup the components and enter data into them

- Links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface of the *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, with information about where to find the most current version of each.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleCode API Reference

Part 2

CRM Multi-Product Foundation

Chapter 2

Working with Business Units and TableSet Controls

Chapter 3

Setting Up General Options

Chapter 4

Setting Up Security and User Preferences

Chapter 5

Working with Notes and Attachments

Chapter 6

Using Interactive Reports

Chapter 7

Setting Up Currencies

Chapter 8

Setting Up Credit Card Encryption

Chapter 9

Implementing Alternate Character

Chapter 10

Setting Up Auditing for Cases and Inbound Email

Chapter 11

Running Diagnostic Reports

Chapter 2

Working with Business Units and TableSet Controls

This chapter provides overviews of business units and TableSet controls in PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) and discusses how to define TableSet controls.

Understanding Business Units in PeopleSoft Enterprise CRM

This section discusses:

- Business unit structure.
- Uses of business units in PeopleSoft Enterprise CRM.

Business Unit Structure

A business unit represents an operational entity for an application. The structure of a business unit depends on the requirements of the PeopleSoft Enterprise CRM application in which the business unit is defined. For example, you might structure a sales organization (and thus the PeopleSoft Sales CRM business units) on region lines but structure a support organization (and thus the PeopleSoft Support CRM business units) around different product lines.

Using business units enables you to group transactions for reporting purposes. Business units do not have predetermined restrictions or requirements. You can define business units to reflect departmental functionality, along product lines, or by location. An entire organization might have only one business unit if every department uses the same processing rules. Diversified companies, such as those that have multiple cost centers, divisions, or subsidiaries, usually have multiple business units.

PeopleSoft does not deliver predefined business units. You decide how to implement business units in PeopleSoft applications to reflect the structure of the enterprise. Business units are usually specific to individual applications: for example, you set up field service business units for the PeopleSoft Field Service application and Sales business units for the PeopleSoft Sales application. However, some applications can share business units. For example, PeopleSoft Support and PeopleSoft Help Desk are both call center applications and can use the same business unit because the nature of their applications is similar.

You can also relate business units across integrated applications. For example, you can associate call center business units with field service business units for service order integration and with sales business units for sales lead integration.

Warning! After you define a structure, you cannot delete a business unit—you can only inactivate it. Before creating and securing business units, think carefully about how you want to set up the organizational structure and about what information you want groups of users to access.

Uses of Business Units in PeopleSoft Enterprise CRM

Transactional data in PeopleSoft Enterprise CRM is associated with business units. For example, leads belong to PeopleSoft Sales business units, and service orders belong to PeopleSoft Field Service business units.

Business units can control the following types of processing:

- Business logic.

Some features are enabled and disabled at the business unit level rather than at the application level. For example, PeopleSoft Field Service enables automatic receiving by business unit.

- Reporting and analysis.

You can report and summarize information by business unit. For example, several reports that are in PeopleSoft Support and PeopleSoft HelpDesk filter data based on business unit.

- Default values.

Values often appear by default for every transaction that is associated with a business unit. For example, the currency value appears by default for each Sales business unit.

- Filtering of values for prompt fields.

Prompt fields on PeopleSoft transactions components are often populated differently based on business unit. For example, in PeopleSoft Support you might set up one business unit to handle software issues and another to handle hardware issues. The values that are available to each business unit for the case type and product fields differ depending on whether the business unit that handles the case is set up for software or hardware cases.

- Security.

Business units enable you to control row-level security. You can control access to setIDs by user or permission list.

See [Chapter 4, "Setting Up Security and User Preferences," Setting System-Wide Security Options, page 69.](#)

Use of Business Units by CRM Applications

You can use the same business unit across applications. You create the business unit in one application, then use each application's setup component to associate the business unit with each application that uses the business unit.

See [Chapter 2, "Working with Business Units and TableSet Controls," Defining Business Units and TableSet Controls, page 16.](#)

See Also

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook

PeopleSoft Enterprise CRM 9.1 Marketing Applications PeopleBook, "Defining PeopleSoft Marketing Business Units"

PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook, "Defining Call Center Business Units and Display Template Options"

PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook, "Defining Order Capture Business Units"

PeopleSoft Enterprise Sales 9.1 PeopleBook, "Setting Up Business Units for PeopleSoft Enterprise Sales"

Understanding TableSet Controls in PeopleSoft Enterprise CRM

This section discusses:

- TableSet control terminology
- TableSet control scenarios
- TableSet control example

TableSet Control Terminology

The TableSet control architecture uses the following terminology:

TableSet

TableSets are groups of control tables that enable you to share the same control values among multiple business units. This reduces data redundancy by enabling multiple business units to access shared information while keeping information such as departments decentralized. You can use business units and TableSets to associate a business unit with individuals in the enterprise or to specify default values for a business unit's transactions.

TableSets also enable you to limit data access by associating the business unit with a list of record groups, each of which is associated with a setID. The setID in turn is associated with one or more values that are in a control table.

SetID

SetIDs are the labels that identify a TableSet. SetID functionality in PeopleSoft Enterprise CRM provides a higher business level for rollup of business unit data in reports and for other purposes. Just as business units organize the company or organization, setIDs organize data within the system.

Business units are used to group and filter transactions, and setIDs are used to group and filter the setup data. To create logical groupings of values, you associate setIDs with each value.

For example, you might have two call center business units, one for U.S. operations and one for European operations. If you sell different products in the U.S. and Europe, then you use two setIDs with the products: one for U.S. products, and one for European products. You can associate these different product setIDs with the two call center business units to ensure that call center agents in each geographic region see only products that are sold in that region. You can also use setIDs to group the different case types that are handled by the call centers.

Some PeopleSoft tables (control tables and prompt tables) use a setID as a high-level key to identify and retrieve data from system databases. The setID segregates the data in the control tables, which enables many business units to share the same set of data on the physical table in the system by grouping values for filtering purposes.

SetIDs are shared across applications. For example, all PeopleSoft Enterprise CRM business units have TableSet controls that determine valid products for each business unit. Therefore, when you establish product setIDs, you need to consider how products appear in each PeopleSoft Enterprise CRM application that you plan to implement.

Control (or Setup) Table

Control tables enable you to establish values for fields that are in transactional pages. For example, the Case Type control table contains all the valid case types. When a support agent opens a case, the Case Types table supplies the list of valid types from which the support agent can select.

Record Group

Record groups contain similar setup tables. For example, some record groups are specific to call center setup tables. There is one record group for the tables that contain problem attributes (case type, category, and so forth), another record group for tables that contain impact attributes (priority and severity), and so on. Additional record groups control setup tables (for example, products and solutions) that are shared with other applications.

Setup components in the same record group must use the same setID for a given business unit. For example, suppose you have two different business units with two different setIDs and you also want to separate case type by setID. Because case type is in record group RC-03 and category, type, and details are also in that record group, you must also assign different setIDs for category, type, and details if you have different setIDs for different case types.

When a record is in a given record group, views that contain the record are also in the record group if the views are keyed by setID. Related language records do not necessarily appear in the record group.

PeopleSoft-delivered setup tables are already organized into record groups. Not all record groups are relevant to all business units. For example, case attribute record groups are relevant to call center business units, but not to sales business units. You can look at the TableSet definition for an existing business unit to see which record groups are used by which application.

TableSet Controls

TableSet controls associate business units with record groups and setIDs. Each business unit has its own TableSet control, which is stored on the TableSet Record Group Control table. You can associate a setID for each individual record group to a business unit.

You can use either a business unit or a setID to set up PeopleSoft Enterprise CRM TableSet controls. For example, if you are in the product component (in which case, the underlying record is keyed by setID) and you prompt on a field that is also keyed by setID, PeopleTools actually looks for the setID of the prompt record by passing in the product setID.

Note. The pages where you set up and review setIDs, record groups, and TableSet controls are part of PeopleTools. Because PeopleTools supports TableSet controls based on attributes other than business unit, the PeopleTools documentation uses the generic term set control field.

Since PeopleTools doesn't always use business unit, it is important that you set up both the setID and the business unit.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Lifecycle Management Guide

TableSet Control Scenarios

Not every organization needs to use the more complex TableSet control capabilities. Consider these scenarios as you decide how to use TableSet controls:

- You have only one business unit.

All of the setup data is valid for that business unit. Therefore, you only need one setID. When you create the business unit, specify this setID as the default. The system creates the TableSet control.

- Multiple business units use all the same setup data.

All of the setup data is valid for all business units. Therefore, you still only need one setID. When you create business units, specify this setID as the default for all business units, and the system creates TableSet controls.

- Multiple business units use separate sets of setup data.

In this scenario, you have one set of setup data for each business unit. Therefore, you need one setID per business unit. As you create each business unit, you specify its default setID. Once again, the system creates TableSet controls for you.

- Multiple business units use some shared setup data and some unique setup data.

This is the only scenario in which you have to configure the TableSet controls. The business units use different setIDs for different record groups, and therefore the default setID is not valid for all record groups. You still specify a default setID when you create each business unit, but you must override the default later.

TableSet Control Example

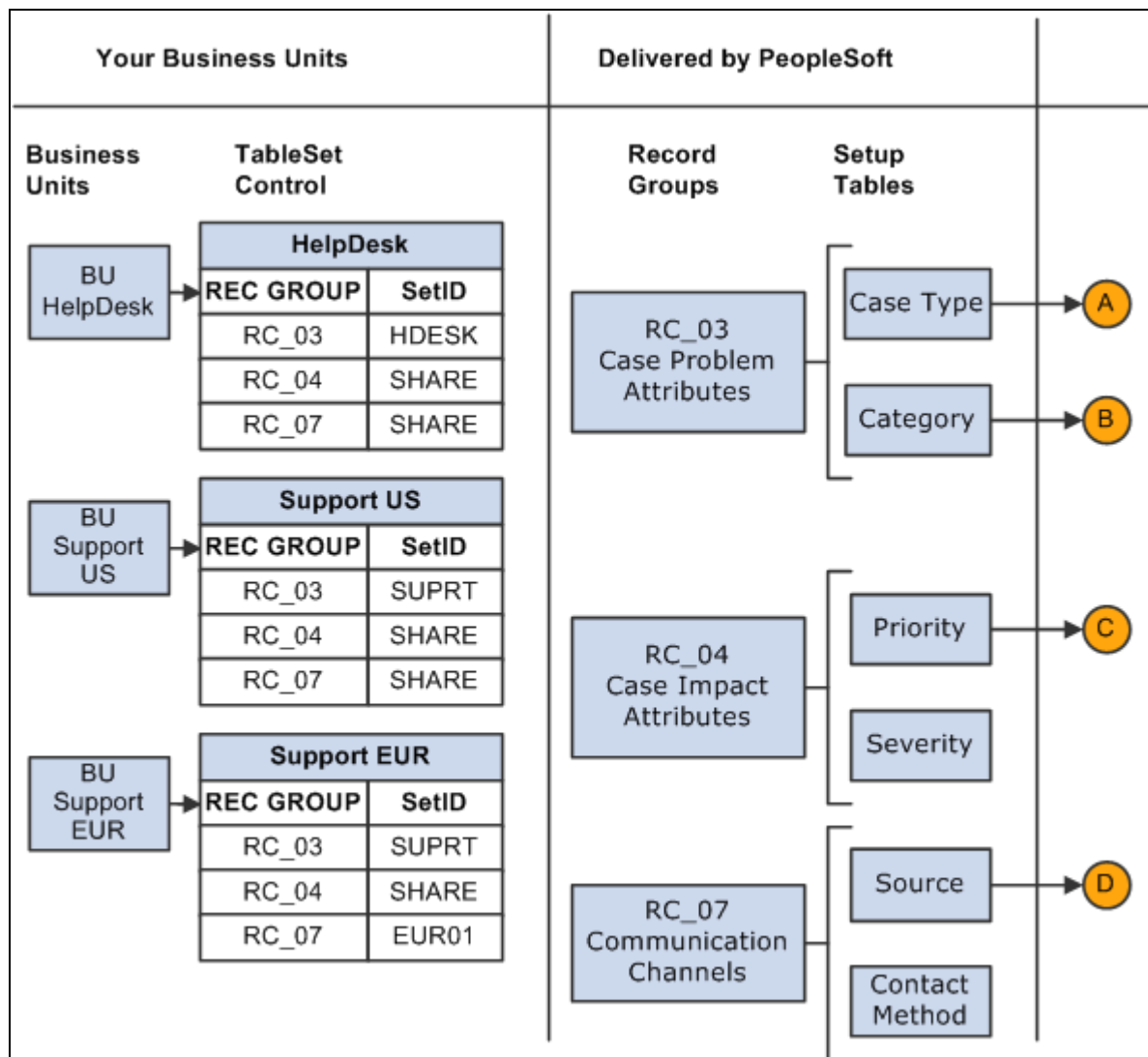
The following diagram illustrates the most complex TableSet control scenario: multiple business units use some shared setup data and some unique setup data.

The diagram represents the business units and setIDs that are established by an organization with three call center business units, one for its U.S.-based help desk operations, one for its U.S. support operations, and one for its European support operations.

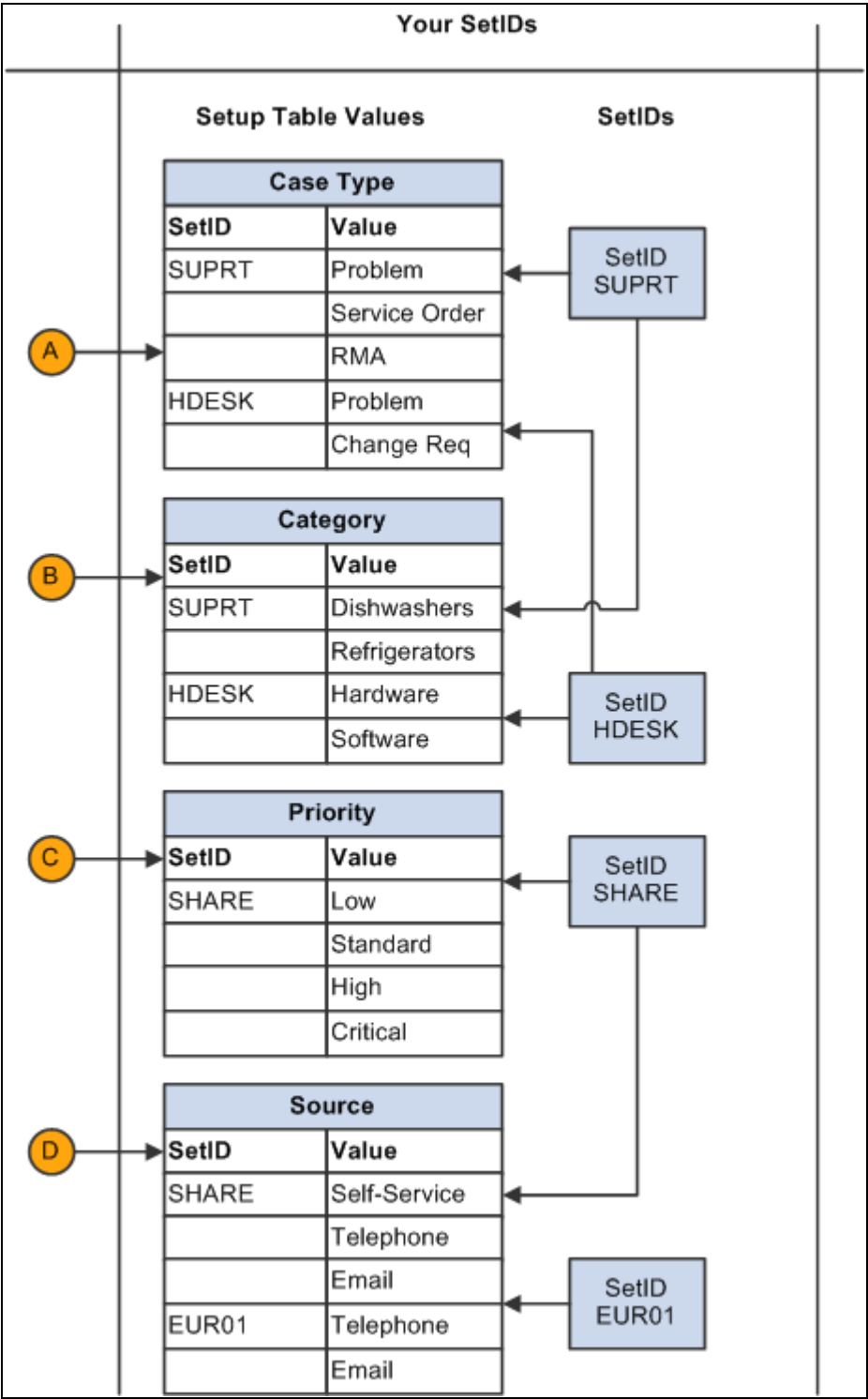
The organization has these requirements for sharing setup data:

- There are two sets of case problem attributes (record group RC_03): one for the two support business units and one for the help desk business unit.
- There is one set of case impact attributes (record group RC_04); all three business units share the values.
- There are two sets of communication channel attributes (record group RC_07): one set for the U.S.-based business units and one for the European business unit.

This diagram illustrates the tables that manage the relationship between business units, record groups, and setIDs:



Business units, SetIDs, and TableSet controls



Business units, SetIDs, and TableSet controls

Notice the following details in the diagram:

- Values that are valid for more than one setID are entered for each setID for which they are valid.

For example, both the help desk business unit and the support business units have a case type of *Problem*. The different business units cannot share this value because they are associated with different setIDs. Therefore, the problem case type is set up twice in the Case Type table: once under the HDESK setID, and once under the SUPRT setID.

Setting up case types is simple, involving only a setID, a unique identifier, and descriptive information. But for more complex setup tables (for example, the product table), duplicate data becomes difficult to maintain. The more complex the setup tables are, the more you have to gain by sharing values across business units.

- The Case Type table is part of the record group for case problem attributes (RC_03). Therefore, the values for all tables that are in the RC_03 record group are split into help desk values (associated with the HDESK setID) and support values (associated with the SUPRT setID).
- The preceding diagram illustrates two different ways of handling setIDs when values are shared by some, but not all, business units:
 - You can have setIDs that correspond to the specific groups of values, as the setup for the record group for case problem attributes (RC_03) illustrates: there is one setID for the support business unit and another setID for the help desk business unit.
 - You can use a general-purpose setID, such as SHARE, for shared values and use other setIDs on an exception basis, as the setup for the communication channels record group (RC_07) illustrates.
- The system uses the default SETID table to determine default values for the setIDs that are associated with each record group in a new business unit. For example, a setID US100 might use US100 for most setIDs but use SHARE for departments. If you define US100 as the default setID for the a new business unit, then the new business unit also uses US100 for all setIDs except departments, for which it uses SHARE.

Defining Business Units and TableSet Controls

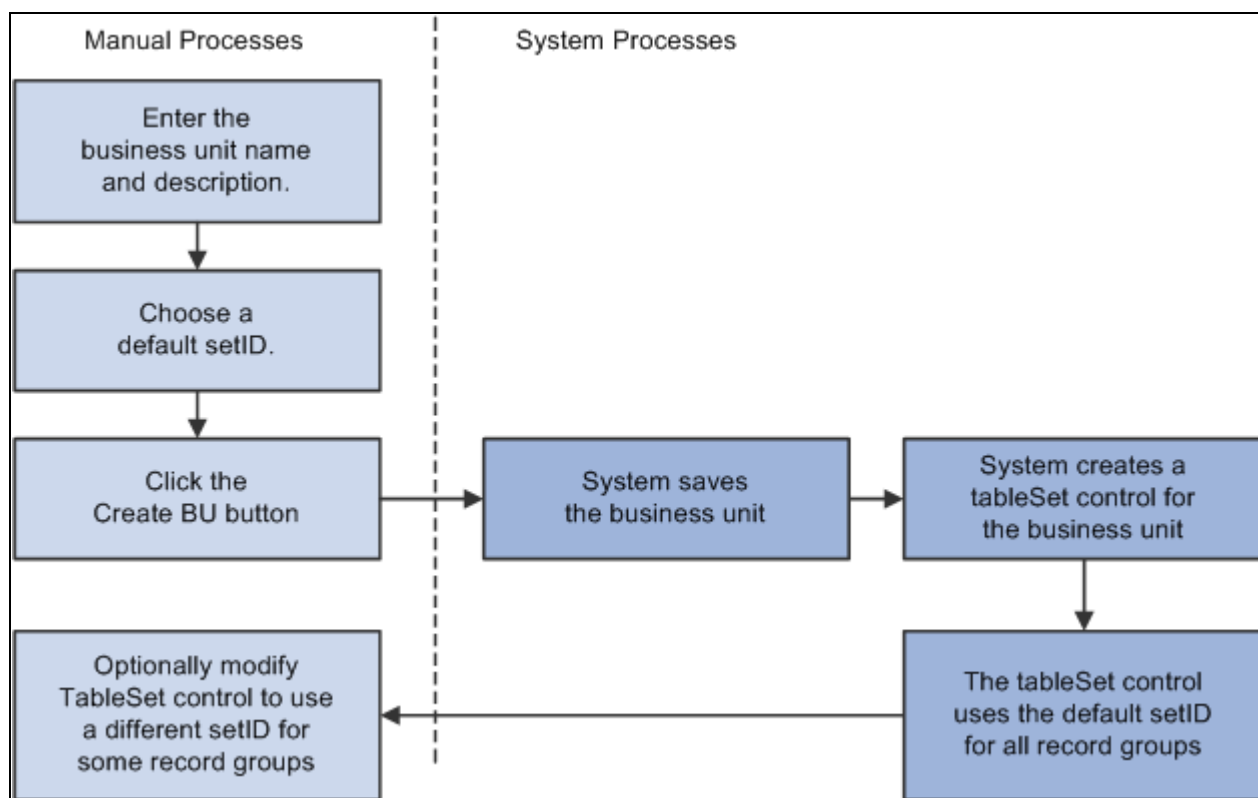
To define tablesets, use the TableSet ID (SETID_TABLE) component.

This section provides an overview of the TableSet control setup process and lists the pages used to define TableSet controls.

TableSet Control Setup

When you create a new business unit, the system creates a setID with the same name as the business unit. The newly created TableSet control associates all record groups with that setID. This is a convenient shortcut when you have multiple business units with identical or similar TableSet controls.

This diagram illustrates the TableSet control setup process.



TableSet control setup process

To define a business unit's TableSet control:

1. Create the business unit on the appropriate application-specific page.

The system creates a default setID corresponding to the business unit name.

If the business unit uses only its default setID, you are finished; continue to the next step only if the business unit uses setIDs that are other than its defaults.

2. Use the TableSet Control page to create additional setIDs.
3. Use the Record Group page (in the TableSet Control component) to map setIDs to record groups.

If necessary, use the Record Group page (in the Record Group component) to review which records are in each record group.

In addition to setting up business units and setIDs, you must set up appropriate security.

See [Chapter 4, "Setting Up Security and User Preferences," page 49](#).

Note. The pages where you set up and review setIDs, record groups, and TableSet controls are part of PeopleTools. Because PeopleTools supports TableSet controls based on attributes other than business unit, the PeopleTools documentation uses the generic term *set control field*.

You can use either a business unit or a setID to set up PeopleSoft Enterprise CRM TableSet controls. For example, if you are in the product component (in which case, the underlying record is keyed by setID) and you prompt on a field that is also keyed by setID, PeopleTools actually looks for the setID of the prompt record by passing in the product setID.

Since PeopleTools doesn't always use business unit, it is important that you set up both the setID and the business unit.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide

Enterprise PeopleTools 8.50 PeopleBook: Getting Started with PeopleTools

Pages Used to Define Business Units and TableSet Controls

Page Name	Definition Name	Navigation	Usage
Call Center BU	BUS_UNIT_RC1	Set Up CRM, Business Unit Related, Call Center Definition, Call Center BU	Create a call center business unit and its default setID.
FieldService Business Unit	BUS_UNIT_RF1	Set Up CRM, Business Unit Related, FieldService Definition, FieldService Business Unit	Create a field service business unit and its default setID.
Marketing Definition	RA_BUS_UNIT_TBL	Set Up CRM, Business Unit Related, Marketing Definition, Marketing Definition	Create a marketing business unit and its default setID.
Internal (order capture definition)	BUS_UNIT_RO1	Set Up CRM, Business Unit Related, Order Capture Definition, Internal	Create an order capture business unit and its default setID.
Quality Definition	RQ_BUS_UNIT_TBL	Set Up CRM, Business Unit Related, Quality Definition, Quality Definition	Create a quality business unit and its default setID.
Sales Definition	RSF_BUS_UNIT_TBL	Set Up CRM, Business Unit Related, Sales Definition, Sales Definition	Create a sales business unit and its default setID.

Page Name	Definition Name	Navigation	Usage
Define Change Management	BUS_UNIT_TBL_RG	Set Up CRM, Business Unit Related, Change Management Definition, Define Change Management	Create a change management business unit and its default setID.
Online Marketing Definition	BUS_UNIT_TBL_RY	Set Up CRM, Business Unit Related, Online Marketing Definition, Online Marketing Definition	Create a change management business unit and its default setID.
TableSet ID	SETID_TABLE	PeopleTools, Utilities, Administration, TableSet IDs, TableSet ID	Create a setID.
TableSet Control	SET_CNTRL_TABLE1	PeopleTools, Utilities, Administration, TableSet Control, TableSet Control	Review and modify a business unit's TableSet control (which setID is used for which record group).
Record Group	REC_GROUP_TABLE	PeopleTools, Utilities, Administration, Record Group, Record Group	Review the records that are included in a record group.

Chapter 3

Setting Up General Options

This chapter provides an overview of PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) general options and discusses how to:

- Set up automatic numbering rules.
- Set up PeopleSoft Enterprise CRM application installation options.
- Set up regions.
- Set up locations.
- Set up salutation codes.
- Define alpha indexes.
- Set up payment terms.
- Set up data archiving.

Understanding PeopleSoft Enterprise CRM General Options

This section discusses:

- Automatic numbering.
- Installation options.
- Regions.

PeopleSoft Enterprise CRM general options are the basic control values that apply to multiple PeopleSoft Enterprise CRM applications.

Automatic Numbering

The system can automatically generate unique numeric identifiers for many PeopleSoft Enterprise CRM objects by tracking the last number used and increasing the number by one for each new object. Autonumbers come from several sources: autonumbering rules, last numbers, and PeopleTools global unique identifiers (PeopleTools GUIDs).

If you need to autonumber in increments that are greater than one, use the `GetNextNumberWithGapsCommit()` function.

Autonumbering Rules

When you set up autonumbering rules, specify number prefixes and set the length of the identifier. You can use different rules for different setIDs.

Depending on how you set up autonumbering, duplication of numbers between business units can occur. For example, suppose that you use PeopleSoft Computer/Telephony Integration (PeopleSoft CTI) and callers key in a number, such as a service order ID, that is generated through autonumbering rules; you must set up autonumbering to ensure that the number is unique across all business units.

To review which objects use autonumbering rules, review the number types that you can select on the Auto Numbering page.

See [Chapter 3, "Setting Up General Options," Setting Up Automatic Numbering Rules, page 24.](#)

SetIDs and Autonumbering

Certain objects that are not keyed by business unit or setID are hard-coded to use rules that are set up under the SHARE or NONE setIDs. In this case, if you set up an autonumbering rule for any of these objects under a regular setID (for example, CRM01), the system uses the rule of the setID that is hard-coded to this object when it assigns the next number to a new record. As a result, the autonumbering rule of the NONE setID, not CRM01, is used.

Last Numbers

Enter only the last number that the system uses to create new identifiers. For each object that uses this method, PeopleSoft delivers a row of data in the Last Number table (PS_RC_LAST_NBR_TBL). You can review the data and change the starting number, but that is the only necessary setup.

Numbers are not associated with setIDs, which means that the numbers are guaranteed unique across the system.

To review which objects use last numbers, review the data that appears on the Last Numbers page.

See [Chapter 3, "Setting Up General Options," Specifying Last Numbers, page 25.](#)

Last Number Types

PeopleSoft delivers PeopleSoft Enterprise CRM with a set of last number types and a predefined Last Number table which includes the last number types that are required for the core PeopleSoft Enterprise CRM applications. When you add PeopleSoft Enterprise CRM applications for specific vertical markets, you must add last number types for objects used by those applications to avoid system errors that result from the object having no entry in the Last Number table.

For example, the following error might occur:

While trying to create the Time Header record, an error has occurred. If the error continues to happen, contact your Systems Specialist. RC_CASE.BUSINESS_UNIT.SavePreChange (Record PeopleCode).

To resolve this error, add the last number type, TIME_SHEET_ID, for the SHARE setID (or the specific setID that you have defined).

See [Chapter 3, "Setting Up General Options," page 21.](#)

PeopleTools GUIDs

GUIDs are used only where the number is not visible online; there is no setup associated with these objects. For instance, business object IDs use GUIDs.

Installation Options

Installation options include system settings for PeopleSoft Enterprise CRM products that you installed. The system options that you set determine:

- Which PeopleSoft Enterprise CRM products you are using.
- Defaults for system options and data, such as country, market, and exchange rate calculations.

See [Chapter 7, "Setting Up Currencies," Calculating Currency Exchange, page 157.](#)

- The standard work week used to determine the start and end time of holidays and to determine worker availability for assignments.

See [Chapter 3, "Setting Up General Options," Setting Calendar Options, page 32.](#)

- The character set that the system uses for languages whose symbols are not easily represented by a single-byte code.

See [Chapter 9, "Implementing Alternate Character," page 171.](#)

- The business object that represents guest users or anonymous callers in the system.

See [Chapter 4, "Setting Up Security and User Preferences," Setting Up Guest Users, page 105.](#)

- What data is available to Human Resources Help Desk.

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Managing Enterprise Integration for PeopleSoft Enterprise CRM," Understanding Enterprise Integration Technology.

- How different applications perform contractual pricing and billing.

See [Chapter 26, "Defining Pricing Information for Services and Support Offerings," Establishing Pricing Records, page 523.](#)

Regions

You can associate regions with customer and worker addresses, provider groups (as part of the group assignment criteria), sales territories, product definitions, and (in PeopleSoft Phone Number Administration) with pools of telephone numbers.

See [Chapter 3, "Setting Up General Options," Setting Up Regions, page 35.](#)

Setting Up Automatic Numbering

To set up automatic numbering, use the Automatic Numbering (AUTO_NUM_PNL) component.

This section discusses how to set up autonumbering rules.

Pages Used to Set Up Automatic Numbering Rules

Page Name	Definition Name	Navigation	Usage
Setup Auto Numbers	AUTO_NUM_PNL	Set Up CRM, Common Definitions, Codes and Auto Numbering, Automatic Numbering, Setup Auto Numbers	Define automatic numbering for objects that use numbering rules.
Last Number Setup	RC_LAST_NBR_TYPE	Set Up CRM, Common Definitions, Codes and Auto Numbering, Last Numbers, Last Number Setup	Specify last numbers for objects that use last numbers in autonumbering.

Setting Up Automatic Numbering Rules

Access the Setup Auto Numbers page (Set Up CRM, Common Definitions, Codes and Auto Numbering, Automatic Numbering, Setup Auto Numbers).

Setup Auto Numbers page

Note. If you have PeopleSoft Integrated FieldService installed and you are setting up autonumbering for service order IDs (SO_ID), you must also set up autonumbering for timesheets, material IDs and manage expenses IDs or you will receive an error message when using the application.

SetID

Displays the setID that controls the numbering rules. A few objects are hard-coded to use either the SHARE or NONE setID.

See [Chapter 3, "Setting Up General Options," Automatic Numbering, page 21.](#)

Number Type

Displays the type of object whose rules you are setting up or displaying.

Field Name	Displays the field where the number is stored—for most objects, this is the object identifier. The system enters the appropriate field name based on the number type.
Length	Displays the length of the field, so that you are sure that the numbers that you generate are not too large for the field.
Start Seq (start sequence)	Enter a prefix that is placed in front of the number. The prefix can contain up to three alphanumeric characters. A start sequence of three zeroes ("000") indicates that no prefix is used.
<hr/> <p>Note. PeopleSoft CTI requires that all user inputs are either all numbers or all letters, but not a mix. Certain autonumbered fields that PeopleSoft CTI users enter (for example, IDs for orders, service orders, and customers) normally can contain a mix of numbers and letters, but if you use PeopleSoft CTI, give these fields autonumbering definitions that use just one or the other.</p> <hr/>	
Max Length (maximum length)	Enter the maximum length of the number. This cannot exceed the length of the field.
Last Number Issued	Enter the last number issued. Automatic numbering begins with the next number.
Default?	Select the autonumbering rule to use by default when the start sequence is not specified. If more than one row of autonumbering rules exists, you can activate only one as the default.

Specifying Last Numbers

Access the Last Number Setup page (Set Up CRM, Common Definitions, Codes and Auto Numbering, Last Numbers, Last Number Setup).

Last Number Setup

Last Number Types						Customize	Find	First	1-42 of 42	Last
Object Type	*Description	*Record (Table) Name	*Field Name	Last Number	Test					
ACTI	Branch Script Action	RC_BS_ACTION	RC_ACTION_ID	300,094						
ATCH	File Attachment	BC_ATTACH	ATTACH_SEQ_NBR	20,001						
BODI	Directory Setup	BO_DIR_SETUP	SEARCH_FIELD_ID	300,004						
BP	Business Project Instance	RC_BP_STATUS	BUS_PROC_INSTAN	20,335						
BROL	Role	BO_ROLE	ROLE_TYPE_ID	20,018						
BRSC	Branch Script	RC_BSCRIPT	SCRIPT_ID	11,000,100						
BSAN	Branch Script Answer Set	RC_ANSWER_SET	RC_ANSWERSET_ID	11,000,157						
BSAS	Branch Script Action Set	RC_BS_ACTIONSET	RC_BS_ACTIONSET	300,096						
BSIN	Branch Script Instance	RC_BS_INSTANCE	RC_BS_INSTANCE	20,581						
BSPT	Branch Script Path ID	RC_BS_TREE	BS_PATH_ID	302,287						
BSQU	Branch Script Question	RC_QUESTION	QUESTION_ID	300,516						
BTYP	Business Object Type	BO_TYPE	BO_TYPE_ID	20,001						
CASE	Case	RC_CASE	CASE_ID	220,528						
CMP	Contact Method Purpose	CM_PURP_TYPE	CM_PURPOSE_TYPE	20,001						
CMT	Contact Method Type	CM_TYPE	CM_TYPE_ID	20,001						

Last Number Setup page

Note. Not all rows that appear on the Last Number Setup page appear here.

Object Type Displays the objects for which you can set up autonumbering. The installation process creates a row for each object whose numbering you manage on this page.

Record (Table) Name and Field Name Enter the table and field name of the object.

Last Number Enter the last identification number that is in use for this object. Automatic numbering begins with the next number.

The numbers from 0 to 20000 are reserved for delivered data.



Click the Test icon to increase the last number by one and test the autonumbering functionality.

Add a New Last Number Type Click this button to select a new last number type from a list of last number types. When you add a last number type, you must specify the Object Type, Record (Table) Name, and Field Name with which it is associated.

Setting Up PeopleSoft Enterprise CRM Application Installation Options

To set up PeopleSoft Enterprise CRM Application Installation Options, use the Installation Options (RB_INSTALLATION) and Manufacturer (MANUFACTURER) components.

This section discusses how to:

- Set up general options.
- Set calendar options.
- Set up alternate characters.
- Set up an anonymous business object.
- Set up billing and pricing options.
- Set up manufacturers.

Pages Used to Set Up PeopleSoft Enterprise CRM Application Installation Options

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
General Options	RB_INSTALLATION	Set Up CRM, Install, Installation Options, General Options	Set up the applications that you are using and enter other general options.
Calendar Options	RB_INSTALLATION	Set Up CRM, Install, Installation Options, Calendar Options	Set up the standard workday and workweek for the enterprise at the time of installation.
Alt Character	ALT_CHAR_PNL	Set Up CRM, Install, Installation Options, Alt Character	Set up the alternate characters that the system uses for a specific language code.
Anonymous Object	RB_ANON_BUS_OBJECT	Set Up CRM, Install, Installation Options, Anonymous Object	Set up an anonymous business object.
Billing and Pricing Options	RB_INTEGRATION	Set Up CRM, Install, Installation Options, Billing and Pricing Options	Select options for contractual billing and pricing.
Manufacturers	MANUFACTURER	Set Up CRM, Common Definitions, Manufacturers, Manufacturers	Set up manufacturers for asset integration.

Setting Up General Options

Access the General Options page (Set Up CRM, Install, Installation Options, General Options).

General Options		Calendar Options	Alt Character	Anonymous Object	Billing and Pricing Options
PeopleSoft Products					
<input checked="" type="checkbox"/> Advanced Configurator	<input checked="" type="checkbox"/> Order Capture - Self Service				
<input checked="" type="checkbox"/> Banking Transactions	<input checked="" type="checkbox"/> Partner Commerce				
<input checked="" type="checkbox"/> Bill Presentment	<input checked="" type="checkbox"/> Partner Marketing				
<input checked="" type="checkbox"/> Client Manager	<input checked="" type="checkbox"/> Partner Planning				
<input checked="" type="checkbox"/> CRM Portal Pack	<input checked="" type="checkbox"/> Partner Platform				
<input checked="" type="checkbox"/> CTI Integration	<input checked="" type="checkbox"/> Partner Sales				
<input type="checkbox"/> Event Management	<input checked="" type="checkbox"/> Partner Service				
<input checked="" type="checkbox"/> HelpDesk	<input checked="" type="checkbox"/> Phone Number Administration				
<input checked="" type="checkbox"/> HelpDesk for Human Resources	<input checked="" type="checkbox"/> Policy and Claims Presentment				
<input checked="" type="checkbox"/> HelpDesk-Employee Self Service	<input checked="" type="checkbox"/> Real-Time Advisor				
<input type="checkbox"/> Incentive Management	<input checked="" type="checkbox"/> Sales				
<input checked="" type="checkbox"/> Integrated FieldService	<input checked="" type="checkbox"/> Service Center for Higher Education				
<input checked="" type="checkbox"/> Marketing	<input checked="" type="checkbox"/> Smart Views				
<input checked="" type="checkbox"/> Multichannel Communication	<input checked="" type="checkbox"/> Services Management				
<input checked="" type="checkbox"/> Online Marketing	<input checked="" type="checkbox"/> Strategic Account Planning				
<input type="checkbox"/> Oracle Configurator	<input checked="" type="checkbox"/> Support				
<input type="checkbox"/> Oracle Customer Data Hub	<input checked="" type="checkbox"/> Support-Customer Self Service				
<input checked="" type="checkbox"/> Order Capture	<input checked="" type="checkbox"/> TeleSales				
	<input type="checkbox"/> Workforce Communications				
Product Options					
<input checked="" type="checkbox"/> Higher Education					
<input checked="" type="checkbox"/> Offer Management					
<input type="checkbox"/> Oracle Data Librarian					
<input type="checkbox"/> Sales Product Configurator					
<input checked="" type="checkbox"/> Third Party Optimization					

General Options page (1 of 2)

General Options	
Country	USA United States
Exchange Rate Type	CRRNT Current Rate
Market	Global
Agreement Renewal Lead Time	90 Days
<input type="checkbox"/> Collector/Credit Analyst Req.	<input checked="" type="checkbox"/> 360-Degree Search Context
<input type="checkbox"/> Geo Code Integration	
Credit Card Options	
Cybersource User ID	PS
Cybersource Merchant ID	PS
Cybersource Merchant Key	zG/kz5mjCFvNHpYQKo5vYpNNga sAx4OZ3dcliBMou8eXvnnKDliGv
<input type="checkbox"/> Credit Card Verification Number Required	
HRMS Competency Option	
Use Only Evaluation Type	Approved/Official
Related Case Processing	
Number of Child Cases	5
Sales Options	
<input checked="" type="checkbox"/> Allow Prospects	
Oracle Configurator	
Order Capture Internal	
Order Capture External	
Save	

General Options page (2 of 2)

PeopleSoft Products

This section displays the PeopleSoft Enterprise applications that can be installed in the database. Select the applications that are already installed in the system.

General Options

Country	Enter the country code for the installation.
Exchange Rate Type	Enter the exchange rate that you are using for this PeopleSoft installation.
Market	Select the market for which PeopleSoft Enterprise CRM is licensed. This is <i>Global</i> , unless you license one of the industry applications. In that case, use the market that is applicable to that industry.
Agreement Renewal Lead Time	Enter the number of days that you want the system to use to notify you when agreement need to be renewed.

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

Geo Code Integration This is used for Environmental Systems Research Institute (ESRI) integration. See *PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook*, "ESRI Integration."

360-Degree Search Context Select this option to control the behavior of the 360-Degree View search page. When you select this option, business object information from the 360-Degree View search page remains in system memory. The system uses this information to bypass the search page and retrieve the same business object information the next time the user accesses the 360-degree view as long the current user session is active and the interaction for that business object is still open.

Credit Card Options

Cybersource User ID, Cybersource Merchant ID and Cybersource Merchant Key Enter your Cybersource user ID, merchant ID and key. The information should be available when you sign up with Cybersource for their service. These fields and values are included in the SOAP message for security verification that occurs during the credit card authorization process.

Credit Card Verification Number Required Select this option to make entering verification number mandatory when users enter credit card information as billing method for transactions such as cases, service orders, agreements, sales orders, and prepaid wireless services.

The system generates an error message if this option is selected and a user does not provide a verification number prior to submitting credit card data. In the case of an order, it is put on credit card hold if the verification number is not present.

See [Chapter 8, "Setting Up Credit Card Encryption," Understanding Credit Card Verification Number Encryption, page 160.](#)

HCM Competency Option

Use Only Evaluation Type If you use the Person Competency EIP to synchronize data with PeopleSoft Human Capital Management (PeopleSoft HCM), select the type of evaluation that is considered a valid competency profile.

See *PeopleSoft Human Resources PeopleBook: Manage Competencies*.

Related Case Processing

Number of Child Cases Enter the value below which the Case Relationship AAF action will process the cascade in real time. If the number of child cases for a related case status cascade is equal to or more than the value specified in this field, the status cascade will be processed as a batch job.

Sales Options

Allow Prospects

Select this option if you want to allow Sales users to enter prospects (potential customers and contacts that are not saved to the CDM) into the system.

Prospect information is available only in the transaction for which it is created.

See *PeopleSoft Enterprise Sales 9.1 PeopleBook*, "Understanding Sales Leads and Opportunities," Prospects.

Oracle Configurator

Select the Oracle Configurator check box to activate Oracle Configurator. The *Oracle Configurator* check box is not selected when delivered so if you are already working with the Advanced Configurator, you will be able to continue to work without any changes. If both Oracle Configurator and Advanced Configurator are selected, then the Oracle Configurator integration will take precedence and there will be no sample schemas available for Advanced Configurator.

Note. If you wish to use Oracle Configurator, in addition to selecting the Oracle Configurator check box, you should keep the Advanced Configurator check box selected.

Order Capture Internal Enter an Application ID. The Application ID used here should be the same as that defined in Oracle Applications for use in integrating with PeopleSoft Enterprise CRM. This Application ID is used to integrate the Configurator Server with internal-facing CRM applications, such as PeopleSoft Order Capture.

Order Capture External Enter an Application ID. The Application ID used here should be the same as that defined in Oracle Applications for use in integrating with PeopleSoft Enterprise CRM. This Application ID is used to integrate the Configurator server with customer-facing CRM applications like Order Capture self-service.

Note. PeopleBooks only discuss the setup required within the PeopleSoft Enterprise application. To integrate with Oracle Configurator you must also implement and set up the Oracle Configurator product, including the steps required from that application to link to the PeopleSoft Enterprise CRM system. For details, refer to the Oracle Configurator integration with Peoplesoft documentation, which is available on MetaLink.

For more information about registering applications within Oracle systems, see the *Oracle Applications System Administrator's Guide*.

The *Oracle Configurator Implementation Guide* contains information about the Application ID initialization parameter and the Applications applicability parameter which is used when defining a publication in Oracle's Configurator Developer.

See Also

Chapter 3, "Setting Up General Options," Setting Up Address Formats and Values, page 40

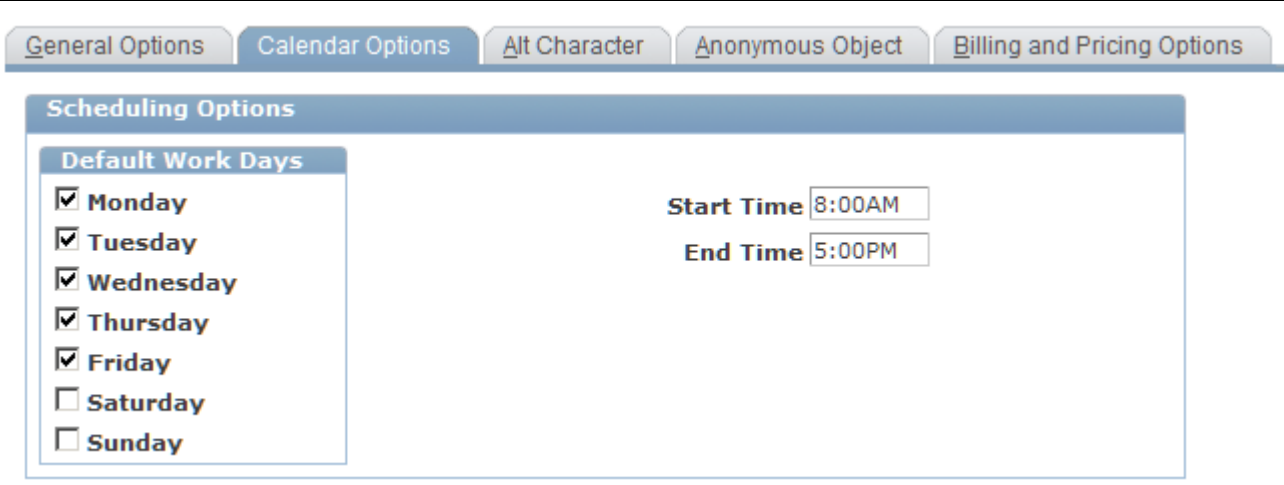
PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Managing Enterprise Integration for PeopleSoft Enterprise CRM"

PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook, "Integrating Product Configuration," Understanding Product Data Synchronization for Use with Oracle Configurator

Setting Calendar Options

Access the Calendar Options page (Set Up CRM, Install, Installation Options, Calendar Options).

Note. You need to define work week information only if you want to create entries on worker calendars automatically when a service order is assigned.



The screenshot shows the 'Calendar Options' page. At the top, there are five tabs: 'General Options', 'Calendar Options' (selected), 'Alt Character', 'Anonymous Object', and 'Billing and Pricing Options'. Below the tabs is a section titled 'Scheduling Options'. Inside this section, there is a 'Default Work Days' list with checkboxes for Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. Monday through Friday are checked. To the right of this list, there are two input fields: 'Start Time' with the value '8:00AM' and 'End Time' with the value '5:00PM'.

Calendar Options page

Default Work Days Select the check box for each standard workday.

Start Time and End Time Enter the default start and end times for the workdays you selected.

Setting Up Alternate Characters

Access the Alt Character page (Set Up CRM, Install, Installation Options, Alt Character).

General Options	Calendar Options	Alt Character	Anonymous Object	Billing and Pricing Options
-----------------	------------------	---------------	------------------	-----------------------------

Alternate Character by Language		Customize	Find	View All	First	1 of 1	Last
Language Code	Alternate Character						
English	Any						

Alt Character page

See [Chapter 9, "Implementing Alternate Character,"](#) page 171.

Setting Up an Anonymous Business Object

Access the Anonymous Object page (Set Up CRM, Install, Installation Options, Anonymous Object).

General Options	Calendar Options	Alt Character	Anonymous Object	Billing and Pricing Options
-----------------	------------------	---------------	------------------	-----------------------------

Anonymous Business Object		Customize	Find	View All	First	1-2 of 2	Last
Role Type ID	Business Object Name						
4	Anonymous Employee						
9	Anonymous User						

Anonymous Object page

See [Chapter 4, "Setting Up Security and User Preferences,"](#) Setting Up Guest Users, page 105.

Setting Up Billing and Pricing Options

Access the Billing and Pricing Options page (Set Up CRM, Install, Installation Options, Billing and Pricing Options).

General Options	Calendar Options	Alt Character	Anonymous Object	Billing and Pricing Options
FieldService Options <input type="checkbox"/> Send Billing Transactions to Contracts <input checked="" type="checkbox"/> Calculate Price on Service Orders				
Call Center Options <input type="checkbox"/> Send Billing Transactions to Contracts <input type="checkbox"/> Calculate Price on Case				
Order Capture Options <input type="checkbox"/> Send Billing Transactions to Contracts				

Billing and Pricing Options page

See Also

PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook, "Setting Up PeopleSoft Order Capture"

Chapter 26, "Defining Pricing Information for Services and Support Offerings," page 523

Setting Up Manufacturers

Access the Manufacturers page (Set Up CRM, Common Definitions, Manufacturers, Manufacturers).

Manufacturers	
SetID APP01	Manufacturer ID ABC INC
*Description	ABC Company, Inc.
Short Description	ABC Inc.

Manufacturers page

Enter a short and long description of the manufacturer in the corresponding fields. Use this page only if you are setting up asset integration with PeopleSoft Financials. The manufacturers that you set up here appear as selections for the Manufacturer field on the Installed Product, Installed Asset, and Product Mapping for Hardware Assets pages.

Note. Certain setIDs, like SHARE, contain manufacturer data that is brought over from PeopleSoft Financials. For these setIDs, you cannot enter values for new manufacturers. In these situations, all values for new manufacturers for the setID must be defined on the FMS system and synchronized to CRM from that source. Manufacturer values are shown in read-only format on the CRM database for these setIDs.

Setting Up Regions

To set up regions, use the Region (RB_REGION) component.

This section discusses how to set up regions.

Page Used to Set Up Regions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Region	RB_REGION	Set Up CRM, Common Definitions, Location, Region Codes, Region	Set up regions for use with various PeopleSoft Enterprise CRM transactions.

Setting Up Regions

Access the Region page (Set Up CRM, Common Definitions, Location, Region Codes, Region).

Region

Category Geography
Region ID ASIA

Region Details

***Status** Active

Region Type

***Description** Asia Pacific

Parent Region ID WORLD World

Region Hierarchy

Left | Right

WORLD - World

+ ASIA - Asia Pacific - Active

+ NORTH AMERICA - North America - Active

+ EUROPE - Europe - Active

+ SOUTH AMERICA - South America - Active

Modified 04/10/2001 9:45AM PDT SAMPLE

Region page

Category

Select to indicate how PeopleSoft Enterprise CRM references this region:

- *Geography:* Use this region in addresses, provider group and worker assignment criteria, and pricing definitions.
- *Product Sales:* Use this region in product definitions to define where the product is sold.
- *Territory Assignment:* Use this region when defining territories in PeopleSoft Enterprise CRM Sales.
- *Number Management:* Use this region for number management (for example, pools of telephone numbers) in PeopleSoft Phone Number Administration.

Status

Select *Active* or *Inactive*.

Region Type	<p>Select a type that describes the basis for regional divisions. General-purpose types are <i>Country</i>, <i>Phone</i>, <i>Postal</i>, <i>Region</i>, and <i>State</i>. <i>Region</i> is the most generic value, used when none of the other values apply.</p> <p>Types that are specific to the communications industry are <i>Service Area</i>, <i>Postal Wireline</i>, and <i>Postal Wireless</i>. A service area is the top-level region for number management; you typically use postal wireline and postal wireless for service area subregions.</p>
Parent Region ID	Enter the region ID for the parent of the region that you are entering. This field sets up the hierarchical relationship for regions and enables you to create parent and child relationships.
Region Hierarchy	Displays the entire regional hierarchy, including the current region.

Setting Up Locations

To set up locations, use the Location (LOCATION_TBL) and Location Timezone (RB_LOC_TIMEZONE) components.

This section discusses how to set up locations.

Pages Used to Set Up Locations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Location Definition	LOCATION_TBL	Set Up CRM, Common Definitions, Location, Location, Location Definition	Define a physical location such as corporate headquarters, a branch office, or a remote sales office.
Location Detail	LOCATION_TBL2	Set Up CRM, Common Definitions, Location, Location, Location Detail	Enter details for the selected location.
Location Timezones	RB_LOC_TIMEZONE	Set Up CRM, Common Definitions, Location, Location Timezones, Location Timezones	Associate locations with time zones.

Defining Locations

Access the Location Definition page (Set Up CRM, Common Definitions, Location, Location, Location Definition).

Location Definition		Location Detail	
SetID CRM01		Location Code KCAB00	
<div> <div>Location Definition</div> <div>Find View All First 1 of 1 Last</div> </div>			
*Effective Date	01/01/1980	*Status	Active
*Description	Calgary Branch	Prefix	
Country	CAN Canada	Phone	
Address 1	2945 Union Street	Extension	
Address 2		Fax	
Address 3			
Address 4			
City	Calgary	Postal	A2K 1R7
County			
Province	AB Alberta		
<input type="checkbox"/> In City Limit		Jurisdiction	
Building		Floor	
Sector			

Location Definition page

Status Select the status of this record as of the associated effective date: *Active* or *Inactive*.

Country Select the country for the location. The system adjusts the other address fields based on the address format that is defined for the selected country.

In City Limit If you provide data to a third-party tax provider, selecting this check box identifies the location as one that is subject to applicable city taxes.

Entering Location Details

Access the Location Detail page (Set Up CRM, Common Definitions, Location, Location, Location Detail).

Location Definition

Location Detail

SetID

CRM01

Location Code

KCAB00

Location Detail

Find | View All | First 1 of 1 Last

Effective Date

01/01/1980

Status

Active

+

-

Description

Calgary Branch

Attention

Location Detail

Location Detail page

- Attention

Enter the name of the person whose name should appear in the Attention field for correspondence for the location.
- Location Detail

Enter descriptive text about the location.

Associating Locations with Time Zones

Access the Location Timezone page (Set Up CRM, Common Definitions, Location, Location Timezones, Location Timezones).

Location Timezones

Location Timezone Search and Assignment

*SetID

CRM01

Location Code

KCB

Search

☐ Show Unassigned Rows Only

Location Timezone

Customize | Find | View All | 1 of 1 | First 1 of 1 Last

Location Code	Description	Time Zone	Country	City	State	Postal Code
KCBC00	Vancouver Branch		CAN	Vancouver	BC	V5C 2Z8

Location Timezones page

- SetID

Enter the setID for the locations that you want to view.
- Location Code

Enter a full or partial location code for the locations that you want to view.

Show Unassigned Rows Only Select to view only locations without a time zone.

Setting Up Address Formats and Values

To set up address formats and values, use the Country (COUNTRY_TABLE) and State (STATE_DEFN) components.

This section discusses how to set up address information.

Pages Used to Set Up Addresses

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Country Description	COUNTRY_DEFN	Set Up CRM, Common Definitions, Location, Country, Country Description	Update country information.
Address Format	ADDR_FORMAT_TABLE	Set Up CRM, Common Definitions, Location, Country, Address Format	Specify formats for addresses so that they conform to the customary address format and conventions of the specified country.
State	STATE_DEFN	Set Up CRM, Common Definitions, Location, State	Add or review a state or province code. PeopleSoft delivers applications with fully populated state code tables (PS_STATE_TBL) and updates these tables as boundaries and designations change.

Updating Country Definitions

Access the Country Description page (Set Up CRM, Common Definitions, Location, Country, Country Description).

Country Description Address Format

Country: GBR

Country Info

*Description: United Kingdom

Short Description: UK

2-Char Country Code: GB ☒ EU Member State

Country Description page

The PeopleSoft system contains fully populated country code tables (PS_COUNTRY_TBL). PeopleSoft updates these tables as national boundaries and designations change.

2-Char Country Code Enter the value-added tax registration ID.
(two-character country code)

EU Member State Select this check box to use euro conventions to translate currencies for this
(European Union member country.
state)

Specifying Address Formats

Access the Address Format page (Set Up CRM, Common Definitions, Location, Country, Address Format).

Country Description

Address Format

Country:GBRUnited Kingdom

Address Fields

Available	Label	Available	Label
<input checked="" type="checkbox"/> Address 1	<input type="text" value="Address 1"/>	<input type="checkbox"/> Number 1	<input type="text"/>
<input checked="" type="checkbox"/> Address 2	<input type="text" value="Address 2"/>	<input type="checkbox"/> Number 2	<input type="text"/>
<input checked="" type="checkbox"/> Address 3	<input type="text" value="Address 3"/>	<input type="checkbox"/> House Type	<input type="text"/>
<input type="checkbox"/> Address 4	<input type="text"/>	<input type="checkbox"/> Field 1 Label	<input type="text"/>
<input checked="" type="checkbox"/> City	<input type="text" value="City"/>	<input type="checkbox"/> Field 2 Label	<input type="text"/>
<input type="checkbox"/> County	<input type="text"/>	<input type="checkbox"/> Field 3 Label	<input type="text"/>
<input checked="" type="checkbox"/> State	<input type="text" value="County"/>	<input type="checkbox"/> Postal Search	
<input checked="" type="checkbox"/> Postal	<input type="text" value="Post Code"/>		

GB Systems Information

National Registry Directory	Configuration File Prefix
<input type="text"/>	<input type="text"/>

Address Format page

- Available

Select to activate the corresponding address field and its label for inclusion as part of the standard address format for this country. When they are entering addresses, users enter a country code, and the system updates the page to display the fields that are appropriate for the specified country.
- Note.

To hide the field for a given country, you must *both* clear the Available field *and* blank out the Label field.
- Label

Enter field labels to configure the address format so that it conforms to the country's address requirements. For example, if you enter *Province* or *Department* in the state label field, this value appears as the label of the field on the address page instead of *State*.
- Postal Search

Select this check box to activate postal searching functionality for Dutch, Japanese, or UK addresses. For the UK, when you select this check box, the system makes the fields that are in the PeopleSoft GB Systems Information group box available for entry.

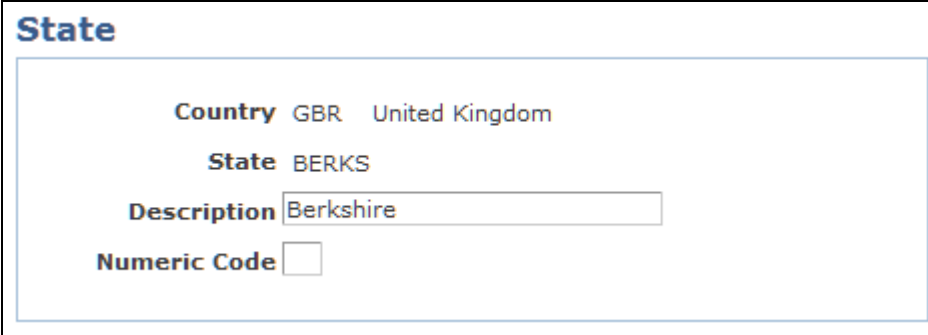
GB (Great Britain) System Information

This group box is used for UK addresses. It displays only if you have the Information Management Toolkit 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).

Adding State or Province Codes

Access the State page (Set Up CRM, Common Definitions, Location, State).



State

Country GBR United Kingdom

State BERKS

Description

Numeric Code

State page

The PeopleSoft system contains fully populated state code tables, complete with descriptions.

Numeric Code Enter a code for statistical and reporting purposes.

Important! You must enter a numeric code for states to display in the lookup for the License Issued By field in the Worker, Consumer, or Contact profile information.

Setting Up Salutation Codes

To set up salutation codes, use the Salutation Table (SALUTATION_TABLE) component.

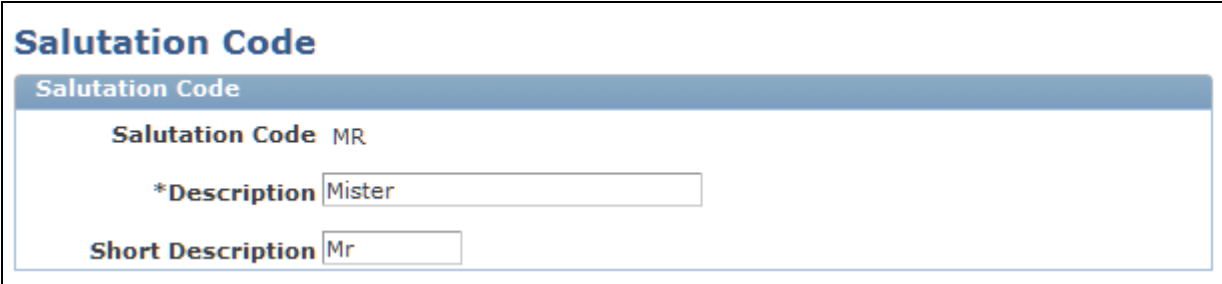
This section discusses how to set up salutation codes that are used in correspondence.

Page Used to Set Up Salutation Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Salutation Table	SALUTATION_TABLE	Set Up CRM, Common Definitions, Customer, Salutation Table, Salutation Code	Set up salutations for correspondence with customers.

Setting Up Salutation Codes

Access the Salutation Code page (Set Up CRM, Common Definitions, Customer, Salutation Table, Salutation Code).



Salutation Code

Salutation Code

Salutation Code MR

*Description Mister

Short Description Mr

Salutation Code page

Enter the code and descriptions for the salutation that you want to use in correspondence and with customers.

Defining Alpha Indexes

This section provides an overview and describes how to define alpha (alphabetic) indexes.

Understanding Alpha Indexes

Alpha indexes are primarily used by the Sales application. An alpha index enables users to quickly locate all customers whose names begin with a certain letter or sequence of letters, similar to using a rolodex. The alpha index appears on account management and contact management pages and consists of the letters of the alphabet, by default.

You can modify the default index and define different alpha indexes for each installed language. Additionally, you can assign different alpha indexes for each user.

See Also

[Chapter 4, "Setting Up Security and User Preferences," Defining Sales Preferences, page 93](#)

Page Used to Define Alpha Indexes

Page Name	Definition Name	Navigation	Usage
Alpha Index Definition	RD_ALPHA_IDX_DEFN	Set Up CRM, Common Definitions, Customer, Alpha Index Definition, Alpha Index Definition	Define alphabetic indexes that are used to filter a user's account list and contact list.

Defining Alpha Indexes

Access the Alpha Index Definition page (Set Up CRM, Common Definitions, Customer, Alpha Index Definition, Alpha Index Definition).

Alpha Index Definition

Language English

Alpha Index Set Find | View All First 1 of 1 Last

*Description Default Alpha Index + -

☒ Default

Alpha Index Items Customize | Find | First 1-26 of 26 Last

*UI Character	*Search String		
A	A	+...	-
B	B	+...	-
C	C	+...	-
D	D	+...	-
E	E	+...	-
F	F	+...	-
G	G	+...	-
H	H	+...	-
I	I	+...	-
J	J	+...	-
K	K	+...	-

Alpha Index Definition page

UI Character	Enter the characters that identify this index on the user interface. For example, to define an index that encompasses the letters A through C, enter A-C.
Search String	Enter the search characters, separated by commas. For example, to search for names beginning with the letters A, B, or C, enter A, B, C.

Setting Up Payment Terms

To set up payment terms, use the Payment Terms (RB_PAY_TERMS) component.

This section describes how to set up payment terms.

Pages Used to Set Up Payment Terms

Page Name	Definition Name	Navigation	Usage
Payment Terms	RB_PAY_TERMS	Set Up CRM, Common Definitions, Customer, Payment Terms, Payment Terms	Define codes for payment terms and enter descriptive information and effective dates.

Setting Up Payment Terms

Access the Payment Terms page (Set Up CRM, Common Definitions, Customer, Payment Terms, Payment Terms).

Payment Terms

SetID SHARE Payment Terms ID NET30

Payment Terms		Find	View All	First	1 of 1	Last
*Effective Date	01/01/1900			*Status	Active	+ -
*Description	Due in 30 Days					
*Short Description	Net 30					
Modified	11/12/2001 1:12PM PST SAMPLE					

Payment Terms page

Add the setID and payment term ID when you are adding a new payment term. Then, enter an effective date, status, and long and short descriptions.

Defining Units of Measure

To define units of measure, use the Units of Measure (UNITS_OF_MEASURE) component.

This section discusses how to define units of measure.

Pages Used to Set Up Units of Measure

Page Name	Definition Name	Navigation	Usage
Unit of Measure	UNITS_OF_MEASURE	Set Up CRM, Common Definitions, Unit Of Measure, Unit of Measure	Define units of measure.

Setting Up Units of Measure

Access the Units of Measure page (Set Up CRM, Common Definitions, Unit Of Measure, Unit of Measure).

Unit of Measure

Unit of Measure EA
Unit of Measure Each
Short Description Each

*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

Conversion Rate

Enter a conversion rate to use as the default conversion rate between the unit of measure shown at the top of the page and the unit of measure listed in the Convert To field. The system automatically calculates the inverse conversion rate.

See Also

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Defining Items"

Setting Up Data Archiving

Data archiving enables you to improve system performance by using online storage for only those transactions that users are likely to access. Other transactions are archived.

Archiving is performed in the PeopleSoft Data Archive Manager using archive templates that are defined for PeopleSoft Enterprise CRM tables. This is a list of the archive templates that are defined in PeopleSoft Enterprise CRM:

Object	Template
Interactions	RI_INTER
Leads	RSF_LEAD
Orders	RO_HDR1
Quotes	RO_HDR1
Marketing Lists	RA_LIST
Chat Logs	RB_CHAT
Call Center Worklist Entries	WL_CASE
Case	RC_CASE
Business Projects	RC_BP
Service Order	RF_SO_HR

See Enterprise PeopleTools 8.50 PeopleBook: Data Management

Chapter 4

Setting Up Security and User Preferences

This chapter provides an overview of PeopleSoft Enterprise CRM security and discusses how to:

- Set system-wide security options.
- Implement self-service security.
- Define PeopleSoft Enterprise CRM application security.

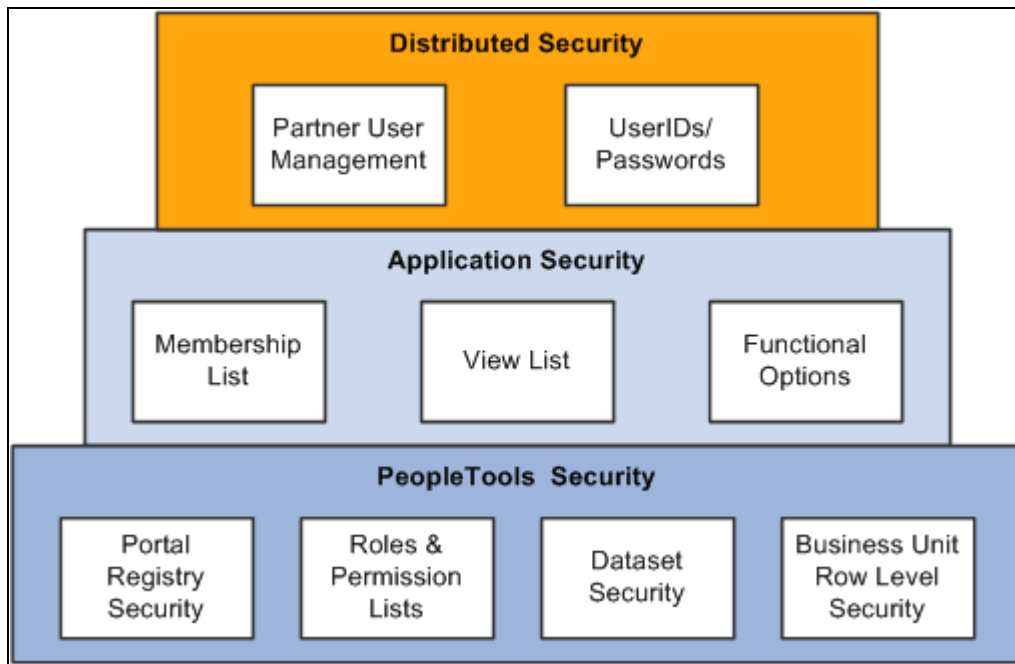
Understanding PeopleSoft Enterprise CRM Security

This section discusses:

- Security building blocks.
- Security terminology.
- PeopleTools security.
- Application security.
- Distributed security.

Security Building Blocks

This diagram provides an illustration of the different layers of security that are delivered in the PeopleTools and Customer Relationship Management security infrastructure. This chapter will cover each of these security building blocks to assist you in implementing the security needed for your enterprise.



Security building blocks

PeopleTools security controls row-level access to transactions. For example, you would use dataset security to enable a sales representative to see leads as the lead owner, or to enable a sales manager to view leads as manager, and so on.

Application security provides three key elements of CRM security: memberships lists, view lists, and functional options. Membership lists can define the characteristics of one or a group of users (for example, partner users) whose system and data access must be secured. View lists can define the characteristics of one or a group of objects (for example, customers) that a member group has view privileges to. Functional options restrict the user to a set of allowable actions within a secured transaction.

Distributed Security or Delegated administration enables you to set up administrators that are external to your enterprise so they can give other users system access, within the confines of the permissions that you allow the administrator to grant.

Security Terminology

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

Security Type	Where Implemented	Function
Network	Network software	Controls entry into the network and authorizes rights to use shared resources.
Relational database management system	Operating system	Controls access to the database.

Security Type	Where Implemented	Function
User	PeopleTools	Controls access to application pages, functions, and business components.
Object	PeopleTools	Controls access to objects or object groups that are used in application development.
Query	PeopleTools	Defines the set of table rows that a user can access while making system queries.
Row-level	PeopleTools and PeopleSoft applications	Restricts access to a subset of data rows within tables to which the user has authority.
Permission list level	PeopleSoft applications	Enables PeopleSoft application security.

PeopleTools Security

Use PeopleTools security to define roles and permissions. PeopleSoft delivers a set of roles out of the box that you can use to set up role-based access to PeopleSoft transactions. PeopleSoft provides a recommended set of roles and permissions with each of the products delivered. You can add or modify new or existing roles and permissions to fit your business requirements.

This section discusses

- Portal registry.
- Roles and permission lists.
- Dataset security.
- Business unit row level security options.
- Preferred markets and security.

Portal Registry

The portal registry is a set of dedicated PeopleSoft database tables that store every content reference, typically a URL, available through the portal. A portal registry has a tree-like structure in which content references are organized, classified, and registered. A portal registry contains folders and content references. Folders group and organize content references into a multilevel hierarchy. Except for the root folder, each folder has a parent folder, and each folder can contain content references as well as other folders. Content references are objects that have been registered in the portal registry.

There are several ways to access and maintain the portal registry:

- Use the registration wizard to register content references, assign security, and update.
- Use the Menu Import feature to upgrade custom menu group definitions.
- Use portal administration pages to add, change, or delete folders and content references from a portal registry.
- Use the portal registry application programming interface (API) for programmatic access to the registry.
- Use the security synchronization process to update the portal registry security based on the menu and script security.

See *Enterprise PeopleTools 8.50 PeopleBook: Portal Technology*

Roles and Permission Lists

Permission lists are the building blocks of user security authorizations. You typically create permission lists before you create user profiles and roles. When defining permission lists, however, consider the roles and user profiles that you will use them with. Recall that roles are intermediary objects between permission lists and users. You use roles to assign permissions to users dynamically. Permission lists may contain any number of permissions, such as sign-in times, page permissions, and component interface permissions. Permission lists are more flexible and scalable when they contain fewer permissions.

Dataset Security

Dataset security controls row-level access to transactions. Dataset security is achieved by associating the definition of a dataset to the search definition for transactions that have multiple dataset rules. PeopleSoft dataset security framework may be used to build dataset rules and assign the dataset rules to PeopleTools roles.

PeopleSoft delivers a set of dataset security rules that may be used to secure transaction rows. PeopleSoft Enterprise CRM uses dataset security for data searches to restrict transaction rows.

It is also used in these applications and functions:

- PeopleSoft Sales (leads and opportunities).
- PeopleSoft Order Capture (quotes and orders).
- Calendar and Task Management.
- PeopleSoft Wealth Management.
- PeopleSoft Marketing (audience and marketing programs).
- PeopleSoft Partner Relationship Manager.

Business Unit Row-Level Security Options

You can implement security to prevent individual users or roles from accessing specific rows of data that are controlled by key fields. Likewise, you can restrict users so that they can access only a specific subset of rows. For example, you might set the user ID security for a call center agent in Paris so that the agent can access only the data that is for a particular European business unit. If you have a team of call center agents in Paris, you could add them all to a role and then use role security to give them all the same access to the system.

A user can belong to multiple roles and use the menu items that are assigned to all of those roles.

Note. You cannot define row-level security attributes by combining roles. In PeopleTools, you designate row-level security for a user by selecting a row-level security role. The row-level security attributes for the role that you select become the security attributes for the user.

This table describes the consequences of row-level security when you use different combinations of system security options and roles:

<i>System Security</i>	<i>Role of User ID</i>	<i>Row-Level Security</i>
No security	The user ID is not linked to a role.	Not applicable. All users can access every object because you have not implemented security.
User-level security	The 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. You can 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 the user has access to menu items but not to any application pages with key fields that are enabled for row-level security.
Permission list-level security	All users in a permission list have the same level of security.	Users are limited to the key fields that are specified by the permission list that is assigned to their user IDs.

You must define the users or roles that have access to specific business units and setIDs. For example, you might give a particular role access to only one business unit. When a user in the role enters prompts for business units (for example, when entering data that has business unit as the primary key), the available selections include only the business units for which the user has been granted authority. The user's available data has been filtered through one or more levels of security.

The number of users that are assigned the same level of security is a key factor in determining whether you base security on user IDs or roles. If a large number of users have identical access requirements, consider using roles. By assigning the users to a single role, you can make subsequent changes to access requirements once rather than many times.

Preferred Markets and Security

The preferred market that is associated with a user ID controls the data and functions that a user can access. Preferred markets are of two types: industry and geographic.

If a user's preferred market is geographic, the user can only access functionality and data that are valid for business units in the geographic region or country. For example, a country might require certain information about imports that users in another country would not need to enter.

If the user's preferred market is by industry, the user is granted access to only the functionality and data that are implemented for those industries. For example, when financial market users define companies, they can specify financial account and contract data.

See Chapter 4, "Setting Up Security and User Preferences," Defining Overall Preferences, page 89.

See Also

Enterprise PeopleTools 8.50 PeopleBook: Portal Technology, "Understanding Portal Technology"

Enterprise PeopleTools 8.50 PeopleBook: Security Administration

Application Security

This section discusses:

- Enterprise administration.
- CRM application security terminology.
- Application security framework.
- Security objects.
- Dynamic and static membership lists.
- Dynamic and static view lists.
- Implicit view lists.
- Functional options.
- Functional option groups.
- Functional options conflict resolution.
- Enabling functional options.
- Business object search system processing.
- Financial services industry security.
- Catalog security.
- How security is processed at runtime.

Enterprise Administration

Application Security consists of three main pieces: membership lists, view lists and functional options. Using PeopleSoft Enterprise CRM application security, enterprise administrators have the ability to:

- Define the community of participants for which security is restricted (membership list)
- Define a group or specific list of objects (for example customers) that a partner is allowed to view and transact with (view list).
- Define a set of business processes or actions that a participant in the membership group can perform (for example, what a partner can do).

CRM Application Security Terminology

This table lists terms related to security:

Term	Definition	Example
Security Object	An object or entity that is being secured.	Partners should be allowed to view only customers that they are allowed to view. Partner is by definition a security object. Customer is also a security object.
Membership List	Characteristics of one or a group of users (for example, partner users) whose system and data access must be secured. The list ultimately contains a list of members.	A group of partners or partner users.
View List	Characteristics of the viewing object (for example, customers, or accounts) that are secured from the membership list. The list ultimately contains a list of objects.	A group of customers.
Functional Options	A unique code that defines what someone can do within a transaction.	Determines whether the partner can maintain orders, add customer addresses, or edit revenue.
Functional Option Group	A grouping of functional options.	Determines whether the partner can maintain orders, add customers, or view customer addresses.
Security Profile	A template that defines the view lists and functional options. A security profile is given to one or multiple membership list domains.	California customers or western manufacturing customers with the ability to maintain orders and add customer addresses.
Transaction	A primary business activity like creating orders, leads, opportunities, cases, service orders, and campaigns.	Order creation.

Term	Definition	Example
Security List Record	A table that stores the results of the security domain queries or the static list.	Partner list.

PeopleSoft Enterprise CRM Application Security Framework

PeopleSoft Enterprise CRM application security framework is a characteristic-based security framework that enables PeopleSoft customers to secure data and functions within a transaction.

For example, suppose you have a group of partner insurance agents that need access to a specific group of customers and you want this group of partners to only generate quotes, submit policy applications, and add customer addresses. Using the pages within the PeopleSoft Application Security component, you can create the security objects, lists, and profiles that you need to secure your PeopleSoft Enterprise CRM applications to accommodate this situation.

Use PeopleSoft application security to abstract partners and customers as security objects. The characteristics that define the group of partners or customers are called lists.

You can predefine the objects and lists as either membership or view to differentiate viewers (partners who are members with a security profile that have access to specific objects and data) from the target transactions or data objects (which can be customers that are secured within the partner's view privileges).

Note. Application security is used only to secure objects (person, partner, customer, financial accounts, product catalog, hold codes, performance metrics, and so on) and not transactions (orders, leads, opportunities, cases, and so on). Objects in this context mean setup data or data that is used to create a transaction.

PeopleSoft CRM does not deliver an application security feature for securing customers from user roles. To make this work, you would have to customize the security criteria in the Business Object Search adapter definition and then make some minor coding adjustments.

Application security involves setting up and defining:

- Membership lists

Membership lists define the characteristics of one or a group of users (for example, partner users) to whom system and data access and functional permissions and privileges are granted. Users in a security membership list definition are associated with a security profile.

- View lists

View lists define the characteristics of the viewing object (for example, customers, accounts, product catalogs) that are secured from the membership list.

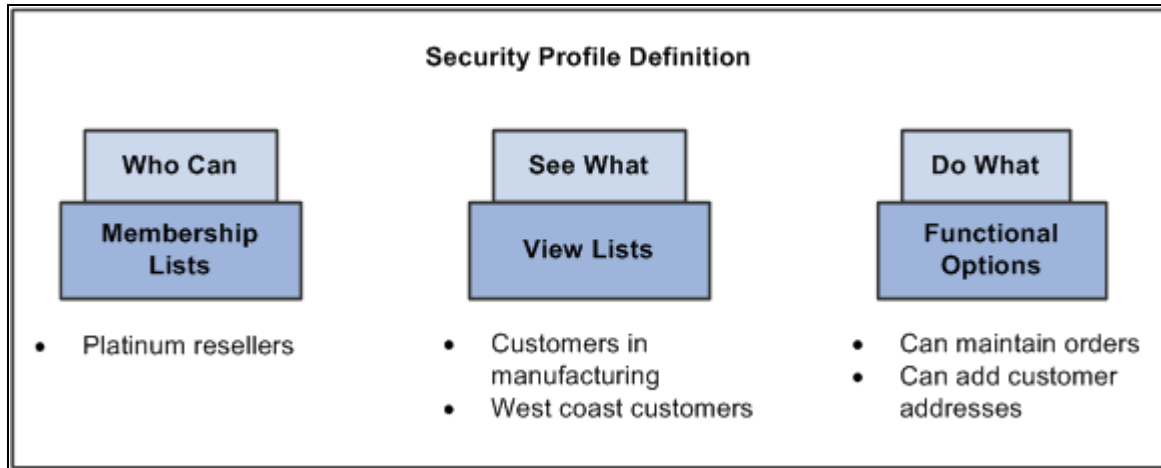
- Functional options

Functional options define the functions (for example, order submission) that can be carried out by members of a membership list.

- Security profiles

Security profiles define the combination of view lists and functional options that make up a specific profile of view and function access. Security profiles are given to members belonging to a membership list.

This illustration represents a high-level view of a security profile using PeopleSoft Enterprise CRM Application Security.



Security profile definition

Security Objects

PeopleSoft delivers a number of security objects that you can use to implement security. You should not, however, change them in any way. Any changes that you make to the security objects delivered by PeopleSoft impact the security profiles and the security list tables. PeopleSoft recommends that you limit the number of security objects that you create and are careful how you use them.

PeopleSoft delivers these membership type security objects out of the box:

Security Membership Object	Security Object Type	Industry
Customer	Membership	Order Capture
Financial Account Holder	Membership	Financial services and insurance
Partner	Membership	All
Partner Contact	Membership	Order Capture
Person	Membership	All
Role	Membership	All

Dynamic and Static Membership Lists

A dynamic membership list is a saved query of characteristics that result in a list of members for a membership list object. The queries are saved using the dynamic criteria definition that is linked to the membership list object.

If the domain type is dynamic, you can edit the membership criteria using the appropriate dynamic criteria definition. You can also view the results of the membership list.

You may associate the membership list to any security profile currently available in the system. Once you associated the membership list with a security profile, that security profile appears in the security profile list for the membership list. When needed, you can remove the association of the membership list to the security profile.

Static membership lists contain a specific list of members that you may associate with any security profile currently available in the system.

Dynamic and Static View Lists

A dynamic view list is a saved query of characteristics that results in a viewable list of objects. You set up a view list object similar to the way you set up a membership list object. After you establish a view list, you may grant one or more view list objects (dynamic or static) to a security profile.

Note. Not all objects can be used as view list objects.

View List Security Objects that are delivered as system data:

<i>View List Security Object</i>	<i>Security Object Type</i>	<i>Application</i>
Catalog	View List	Order capture
Customer	View List	All
Financial Account	View List	Financial services and insurance
Hold Code	View List	Order capture
Performance Metric	View List	Marketing

Implicit View Lists

A dynamically defined view list can contain a bind variable or a criteria that is not resolved at the time of creation of the query but is resolved at runtime. This is called an *implicit* view list.

A business scenario that is supported by *implicit* views lists would enable partners to view customers with whom they have previously done business with, where orders have been submitted with the partner identified.

For example, ABC Insurance (ABC1), during the creation of a home insurance policy, wants to use quick create to enter a new customer called John Smith (JS1). From this point onwards ABC Insurance would want to have access to John Smith's information.

If ABC Insurance (ABC1) creates an auto insurance policy, they would want access to John Smith (JS1) in the lookup table. The presence of both the partner (ABC Insurance) and the customer (John Smith) on the same transaction enables future partner access to that customer.

To create an implicit view list that would give ABC Insurance access to John Smith's account information, you would create a dynamic view list by selecting the *bind* search criteria for the Partner on Order field and then selecting Partner.

When you associate an implicit view list to a security profile and run the list refresh process, the system creates a new security profile for each member of the membership list that is associated to that security profile.

To set up an *implicit* view list, you must use the Configurable Search Setup - Search Fields page to select the *bind* variable for the security components and fields that you want to use on the Add View List or Add Membership List pages.

You can modify the Customer Search (RSEC_CUSTOMER_SRCH) component to use bind variables and create *implicit* view lists.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Search Pages."

Functional Options

Functional options are defined independently of security objects and domains. Functional options let you determine what a user you can do within an application. For example, you can create functional options that enable users to submit orders or add new customers. To group view lists and functional options, you define a security profile. The security profile is then granted or associated to one or multiple membership lists.

Functional Option Groups

Functional option group is a grouping of functional options, which you can be associated with a security profile. Using functional option groups can make maintaining security profiles easier and more efficient. Enterprise administrators that must make wholesale changes to security profiles can simply change the functional option group associated with the security profiles that must be changed or updated.

Example:

In the world of financial services you have consumer account holders. All consumers by default get a functional option group that enables them to withdraw money up to 200 USD from an ATM, transfer balances and so on. At the same time there is also a special consumer called Don Smith whose account number is 123456. Account 123456 is in a view list that is associated to Don's security profile. On this account you can create a specific functional option called Withdraw Money and let him withdraw money up to 300 USD. The general functional option group gives him default access to a group of functional options. But the specific functional option can be applied on his account by attaching a view list to his security profile. Based on the conflict resolution that is set up to override the first optional group, he can withdraw 300 USD from the ATM.

Functional Option Codes

Functional options enable the enterprise administrator to define the functions that users can access within a transaction. Functional options codes are evaluated at run time by the transaction that is evaluating the functional option.

PeopleSoft delivers these functional options codes out of the box when you install and implement PeopleSoft Enterprise CRM:

Functional Option Code	Description	Application/Function
CORE_RS_FCAST_ROLLUP	Forecast will begin in rollup; otherwise it begins in summary.	Sales
CORE_RS_FCAST_SIMPLE	Forecast simple reduces options presented to the forecast user.	Sales
CORE_RS_ADVANCED	Controls basic versus advanced mode for lead and opportunity components.	Sales
CORE_RS_AUTO_ASSIGN_OFF	Controls the ability to automatically assign a lead or opportunity at save in add mode.	Sales
CORE_RS_DEFAULT_OWNER	When lead or opportunity is in add mode at save time, the current user is assigned as the primary sales rep by default. If revoked, then leave lead or opportunity unassigned.	Sales
CORE_RS_SEARCH_PRODUCT_GROUP	Enables the end user to search for product group on leads and opportunities.	Sales
CORE_RS_SHOW_SITE	Controls the ability to add a site to a lead or opportunity.	Sales
CORE_RS_SUMMARY	Control the display of the summary page in lead and opportunity.	Sales
OVERRIDE_IBU	Override Inventory BU	Order Capture
RO_RECUR_MAX_DISCOUNT_PERCENT	Maximum Recurring Discount	Order Capture
RO_RECUR_MAX_SURCHARGE_PERCENT	Maximum Recurring Surcharge	Order Capture
RO_MAX_DISCOUNT_PERCENT	Maximum discount percent.	Order Capture
RO_MAX_ORDER_TOTAL	Maximum order total reached.	Order Capture
RO_MAX_SURCHARGE_PERCENT	Maximum surcharge percent.	Order Capture
RO_MIN_MARGIN_PERCENT	Maximum profit margin percent.	Order Capture

Functional Option Code	Description	Application/Function
SEARCH_ALL_PRODUCTS	When searching for products in Order Capture, this functional option give the user the ability to search for any products that are defined in the system instead of limiting them to the products that are defined in a catalog.	Order Capture
MKTHIDE	Hides marketing fields.	Marketing
MKTDISP	Makes marketing fields display-only.	Marketing
RC_CHOOSE_DIRECT_REPORT	Choose Direct Report	Call Center
RC_ON_BEHALF_OF	On Behalf of	Call Center
RC_SLA_DETACH	Enables user to clear a service level agreement.	Call Center
RSP_ADM_ACCT_TEAM	Administer account team functional option.	Strategic Account Planning
RTM_EDIT_TASK	Edit task functional option.	Task Management
QC	Provides access to Quick Create.	Business Object Search
AFT	Automatic fund transfer.	Financial Services and Insurance
All	All.	Financial Services and Insurance
APPL	Complete applications for new contract.	Financial Services and Insurance
BIPY	Pay bills.	Financial Services and Insurance
CLM	Make a claim.	Financial Services and Insurance
CLOS	Close account.	Financial Services and Insurance
CMPL	File a complaint.	Financial Services and Insurance
CPOL	Change policy.	Financial Services and Insurance
FEER	Reverse transaction fee.	Financial Services and Insurance
INQ	Inquire about new contracts.	Financial Services and Insurance
IWIR	Initiate wires.	Financial Services and Insurance
MDAC	Modify financial account.	Financial Services and Insurance

Functional Option Code	Description	Application/Function
MDEP	Make deposits.	Financial Services and Insurance
MPAY	Make payments.	Financial Services and Insurance
MWTH	Make withdrawals.	Financial Services and Insurance
NEGO	Negotiate terms of new contracts.	Financial Services and Insurance
ORCC	Order cashier's checks.	Financial Services and Insurance
ORDC	Order check copy.	Financial Services and Insurance
ORDD	Order document.	Financial Services and Insurance
ORFC	Order foreign currency.	Financial Services and Insurance
ORTC	Order traveler's checks.	Financial Services and Insurance
PROF	Change profile information.	Financial Services and Insurance
RECH	Reorder check book.	Financial Services and Insurance
REQUI	Request information.	Financial Services and Insurance
RWIR	Release wires.	Financial Services and Insurance
SCHK	Sign checks.	Financial Services and Insurance
SCON	Sign or approve new contracts.	Financial Services and Insurance
SECX	Complete security transactions.	Financial Services and Insurance
STOP	Complete stop payment requests.	Financial Services and Insurance
TMON	Transfer money.	Financial Services and Insurance
TSEC	Transfer securities in and out of accounts.	Financial Services and Insurance

Functional Options Conflict Resolution

Conflicts can happen due to the granting of the same functional options within a single security profile or multiple security profiles. To resolve conflicts the system uses these rules:

- If one functional option group grants an option and another revokes it, the revoke takes precedence. If the options are not in the same scenario, the option is granted. Revoke is for the functional option itself. (for example, do you have authorization for transfer money). If one functional option group says yes and another no, conflicts are resolved based on how the revoke options are set up.

- For amounts there is a conflict resolution called max amount wins. This means that if one functional option group gives a user access to 2000 USD and another functional option group give a user access to 3000 USD, and the max amount win option is selected, the user gets access to 3000 USD.

Here are two scenarios and the resolution mechanisms that are used to resolve the conflicts originating in the functional options:

1. Single Security Profile Functional Option Conflict Resolution:

- Bob is a financial account holder with the account number of 2001.
- Bob is associated with a single security profile (PROFILE_1).
- The security profile is associated with a functional option that allows him to transfer money up to 300 USD.
- Bob's account (2001) allows him transfer money up to 1000 USD.
- The conflict resolution option on the Transfer Money functional option is set for maximum amount always to win.
- *Resolution:* Bob can transfer up to 1000 USD.

2. Multiple Security Profile Functional Option Conflict Resolution:

- ABC Warehouse is a partner to the enterprise.
- ABC Warehouse is explicitly associated to a security profile (PROFILE_2) either through a dynamic membership list domain or a static membership list domain.
- There is also a generic security membership list for all partners (PROFILE_1), which means it includes the Partner ABC Warehouse.
- There are no functional options attached to the view list for both security profiles.
- For PROFILE_1, the administrator has specified functional options so that users can submit orders for amounts up to 5,000 USD.

The ability to add addresses has been revoked.

- For PROFILE_2, the administrator has specified functional options so that users can submit orders for amounts up to 10,000 USD.

The ability to add addresses has been granted.

- The conflict resolution option on the Order Submit functional option is set for the maximum amount always to win.

The Add Address functional option is set so that the revoke option does not win.

- *Resolution:* The ABC Warehouse Partner can submit orders up to 10,000 USD and add addresses.

Enabling Functional Options

The display template framework enables you to configure functional option security for your pages. By referencing the functional option on a button or field within the display template, the functional option security is enabled.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates."

Business Object Search System Processing

The transaction adapter determines, based on the transaction, what fields appear on the customer information subpage and the criteria definition that defines the advanced search page. The criteria definition determines what criteria fields appear on the advanced search page, how they appear, and the search definitions to invoke.

The search definition determines the roles to search for the criteria fields, the fields that appear in the search results, how the search results appear, and the quick create definition that the user accesses to create a new business object.

For each role that is searched, the search role determines the security that is applied, the relationships for the role, and whether fields appear in the search criteria or results set for the role. The field definitions determine how the search fields appear on the page, the database records that are searched for each field, and how the user can search for the field.

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Setting Up Business Object Search and Quick Create," Adding and Modifying BO Search and Quick Create Definitions.

Strategic Account Planning Security

Access to plans and templates is secured by dataset rules. Once a plan or template is activated, no further changes can be made in the active status. Edit control security limits edit privileges to designated individuals who can change the status from active to draft status and make modifications.

To ensure consistency between account plans, account managers define account planning templates containing a default set of objectives and goals. They can attach a list of template editors who have security access to make changes and activate a template. Once a template has been moved from draft to active, and its date range is active, account managers can begin creating account plans from a template. Tasks can be attached to an account plan. These tasks appear when you view the tasks for the associated company.

A plan has two types of application security in addition to the PeopleTools security using the permission list. The row level application security is implemented by using dataset rules. Plan edit control security ensures that the user has been granted appropriate access before any status changes can be made to the plan.

With PeopleTools role security, when a user requests access to a page, the system checks the role of the user, and then checks the permission list belonging to the role to decide if the user can access the page. Certain component items can also be disabled by using the navigation security feature. Throughout the application, certain security measures target two roles: Administrator and Agent. If you define your own PeopleTools roles, you must map the roles with either the Administrator or Agent role to get the security features for the new roles.

See *PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals PeopleBook*, "Configuring Application Security."

Financial Services Industry Security

Financial Services Industry security uses the Application Security framework to secure Accounts.

See *PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals PeopleBook*, "Configuring Application Security."

Catalog Security

Catalogs are a single group of products or services that are marketed and displayed together because they share common criteria. PeopleSoft enables you to define the layout and content of online catalogs for internal and external use. You define the look and feel of catalogs by creating display templates, and then define the contents that you want to organize and present according to your template definitions. You can designate products for inclusion in a catalog either by direct association (using product IDs) or by creating business rules to dynamically build product content based on the selection criteria that you define. Similarly, you can control user access to catalogs by associating a Security Membership List with specific catalogs.

For Order Capture there is a functional option code called `SEARCH_ALL_PRODUCTS`. When searching for products in Order Capture, this functional option will give users the ability to search for any products that are defined in the system, instead of limiting the search to the products that are defined in a catalog. You must group this option into a functional option group. You would then associate it to a membership list in the security profile.

Security Memberships allow you to specify which users or groups of users can have access to certain catalogs. For example, a company can have a Membership List called All Persons that includes all of the people that have a person record in the system. This Membership List is then associated with a catalog.

This means that all of the people on this list can view this catalog. If a catalog called the Premier Catalog was for Premier Customers, a company can create a Membership List that contains all of their Premier Customers and the Premier Catalog would provide special pricing and recommendations for this group of users.

Note. PeopleSoft CRM does not support role-based catalogs, nor do we support role-based access to customers. The system can handle this type of functionality but you will need to customize your CRM application. The only area where you can use a role-based membership list, without customizing your application, is to control the Order Capture hold view list. The other area where you can use the role membership list, without customizing your application, is to control display logic in conjunction with a display template.

See *PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook*, "Creating Catalogs," Defining Catalog Content and Permissions.

How Security Information is Processed at Runtime

PeopleSoft Enterprise CRM application security uses several Application Engines and APIs (application programming interfaces) at runtime to help ensure that the customers and partners to whom you have granted security have access to the correct information and customers.

Here are the elements of runtime security that are activated when a partner, user, or customer attempts to access the PeopleSoft Enterprise CRM applications that you have secured.

- Application Engines
 - `RSEC_DAEMON`

Polls for application updates (for example, when a customer is added or updated) and triggers the `RSEC_BUILDER`
 - `RSEC_BUILDER`

Handles the writing of secure objects to list tables.

- Runtime API
 - Determines security memberships and view lists.
 - Generate SQL filters for calling applications
 - Determines functional options, and functional option resolution.
- Definitional API

Provides application programming interface to add and update security framework metadata.

PeopleCode Application Classes and SQL views provide the API to the security framework. This API is provided for impacted applications to access and update the application security framework. The API is used at runtime to evaluate membership and view privilege result sets, but there are some access methods that are provided to update the framework keys, membership, and view privilege tables directly. The API encapsulates all functionality and structure related to the security framework, so that calling applications do not need to understand the inner workings of the framework.

These access methods are an overview of how each of the impacted applications requirements are satisfied through the API.

- API Based Direct Data Access

This access method is provided for instances where the membership tables contain all of the relevant data for the calling application. This method produces a result rowset based on the underlying security object definition. In this usage there are three known values and one unknown value. The three known values consist of a membership security object type, a view list object type, and either a membership object ID, and or a view list membership object ID. Based on the ID that is provided, the API determines the security profiles that are associated to the known entity, and from the profiles determines the data that is to be provided as a result set. The API returns this data in a rowset based on the security object's list record.

- API Based SQL Data Access

This access method is provided for instances when the results in the membership table need to be merged or joined in a larger SQL statement that is being constructed by the calling application. The known values and the method of data retrieval are the same as the direct data access method, the result of this call is a SQL select statement that returns the keys of the rows of the security object's table. This SQL statement can be used in a SQL *IN* clause or correlated sub query to limit the results of the calling application's constructed query.

- SQL/Query Based Data Access

There may be instances in which the API cannot be used. An example of this is any time where the logic to determine a result set does not have the ability to run a PeopleCode based API, such as a standard PeopleTools prompt, a view, or a PeopleTools query. For these use cases the design provides example SQL that can be used to join the security data model.

- Functional option Conflict Resolution

In instances where a key resolves the same functional option multiple times with different properties, the conflict needs to be resolved. Gathering the functional options and privilege overrides is possible using a SQL UNION, but the resolution of the rules is not possible within a single SQL select statement. This requires impacted applications to be in an environment where it is possible to run PeopleCode to determine the applicable functional options. Because of this functional options are not be determined or executed in a view or query type access method.

- Executing Functional Options

An abstract class/interface is provided to model functional option classes. This class is used by the runtime application to run the functional option logic. The runtime class provides access to the logic that is relevant to the application and coded in the attached application class. The class also provides the ability to access the functional option amount value, operator, base currency, and perform currency conversion if required. The runtime API provide a method to pass multiple functional option codes, and execute them. A calling application's framework could leverage this to provide data driven execution.

- Update to Data Cache

Applications that are responsible for the security objects' secured data require access to update the security cache when a change is made. Since it is possible that a configurable search definition references any data for a given object, all additions and updates to these objects trigger a cache refresh. The known values in this case are the security object type, and security object ID. The API triggers the data caching process providing the known values as parameters. These parameters trigger the caching process to deal only with data that is relevant (for example, the specific object ID).

- Update to Security Framework

This access method is provided for instances where it is required to update the security framework data directly in a batch or EIP type mode. The API provides access to create membership, view privilege, functional option, and security key objects. The system provides methods to create the associations between the various security objects, and keys. Security Object types (for example, partners and customers) cannot be created through the API. Since there is not a lot of business logic tied to the security setup components, the API uses SQL objects to update the framework tables directly rather than building component interfaces.

Note. To improve runtime performance, the result sets for static and dynamic membership and view privilege domains are cached into database list tables. Dynamic implicit domains are cached by spawning security keys for each member in the domain. An Application Engine process provides the mechanism for creating the cache tables that store the membership and view privilege lists.

Distributed Security

This section discusses:

- Delegated administration.
- Role can grant hierarchies.
- Creating security groups.

Delegated Administration

Distributed security, or delegated administration, is the ability to securely delegate administrative responsibility to multiple administrators and managers in an organization (within or external to the enterprise). If you have a large number of partners and high turnover among partner users that you don't manage directly, it is very time consuming to keep track of partner user IDs and access in a centralized administrative function. Delegated administration enables you to set up partner administrators so that they can keep track of partner user access, within the confines of the permissions that you allow the partner administrator to grant.

Role Can Grant Hierarchies

PeopleSoft delivers roles within PeopleTools that give administrators the ability to grant roles to other users in a logical way that represents a hierarchy. For example, when the enterprise administrator and the partner administrator are setting up partner users, they can only grant roles for which they are authorized. Partner administrators, in turn, can access the partner organization tree (sales territory tree), define the partner organization, and create partner users only using roles that the partner administrator can grant.

Role	Can Grant Roles
Enterprise channel manager	Partner admin Partner sales manager Partner Representative
Partner administrator	Partner sales manager Partner representative
Partner sales manager	Partner representative

Creating Security User Groups

PeopleSoft Partner Relationship Management (PRM) supports the use of a territory tree for partners. In distributed security, territory trees are referred to as user groups.

An enterprise can implement user groups in PeopleSoft Partner Relationship Management to set boundaries and limits around what partners can do with territory configuration. A partner manager or partner administrator can modify their own territories to show only their own partner nodes and add and delete individual partner representatives to different nodes of a territory tree managed by the partner administrator.

To implement security user groups, an enterprise completes these setup tasks:

- The enterprise administrator creates the partner territory tree initially.
- For partner organization, the enterprise administrator creates a user group.

For example, you may create a user group called *Channel* to hold all channel partners and add the enterprise channel manager as primary owner of the user group.

- The enterprise channel manager creates a user group.

For example, you may create a user group called ABC Warehouse with the IBM Channel user group as the parent for the partner company IBM. In addition, you create a partner administrator called Sally Smith as the owner. On completion of the task, the system sends an email notification to the Sally Smith, the partner administrator.

See Also

PeopleSoft Enterprise Partner Relationship Management 9.1 PeopleBook, "Setting Up and Managing Partner Registration," Setting Up Partner Registration

Enterprise PeopleTools 8.50 PeopleBook: Security Administration, "Understanding PeopleSoft Security"

Setting System-Wide Security Options

To set up system-wide security options, use these components

- Security Options (SECURITY_OPTIONS).
- Security View Names (SECURITY_VIEW_NAMES).
- Apply Security (APPLY_SECURITY).
- Security SetID Class (SEC_SETID_CLS).
- Security SetID Operator (SEC_SETID_OPR)
- Security Business Unit Class (SEC_BU_CLS)
- Security Business Unit Operator (SEC_BU_OPR)
- Operator Defaults (OPR_DEFAULT)
- Role Worker (RB_ROLE_WORKER).
- Security Views (SECURITY_VIEWS)

This section provides overviews of row-level security views, sensitive worker information, and predefined security roles and sample users and discusses how to:

- Select system-wide security options.
- Activate security options.
- Define view security.
- Define business unit security by permission list.
- Define business unit security by user ID.
- Define tableset security by permission list.
- Define tableset security by user ID.
- Define overall preferences.
- Define call center preferences.
- Define sales preferences.
- Define change management preferences.
- Define account preferences.
- Define roles with access to sensitive worker information.

Understanding Row-Level Security Views

Business units and setIDs are maintained in edit tables and can be used as primary keys throughout the system. When a field uses an edit table to select values, you are limited to the values that are defined for the edit table. With PeopleSoft row-level application security, you can specify which values in the edit table are available in a particular view.

Views enable you to access data horizontally for multiple tables. Views are Structured Query Language (SQL) statements that filter out data rows. Users with permission to access particular setIDs or business units see only a subset of the values in the edit tables.

After you set up views, you can 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 roles.

Security View Names

PeopleSoft delivers applications with security views that apply to key fields in the system. You can alter these views or build views of your own; however, they would be considered a customization. View names include suffixes that reflect the type of security for the view. This table lists the view name suffixes and describes the corresponding security type.

<i>View Name Suffix</i>	<i>Security Type</i>
NONVW	No security.
OPRVW	User security.
CLSVW	Permission list security.

Note. Although PeopleSoft generally follows this naming convention, the system does not enforce it. As long as you have the view defined in the security view names grid the view name will work.

Row-Level Security for Users

After you select security options and set up security view names, define the security-controlled field values that each user or permission list can access. When you secure key fields in the application, the pages that you use depend on the level of system security that you select. If you select user-level security, use the user security pages. If you select role-level security, use the permission list security pages.

Understanding Sensitive Worker Information

PeopleSoft uses enterprise integration points to transmit worker data from PeopleSoft Human Capital Management (PeopleSoft HCM) to PeopleSoft Enterprise CRM. Most of the data that PeopleSoft Enterprise CRM subscribes to from PeopleSoft HCM is sensitive.

Some users, however, should not have access to this data. To give users access to sensitive and semi-sensitive data, you must select the roles that are associated with the users and then indicate what type of information is available to them—either confidential or home contact information.

Users who have sensitive (confidential) data access defined in the Secured Worker Role setup page, can view date of birth, age, national ID, gender, and employee status fields in the Worker and Case components; otherwise, the system hides this information. Users who have semi-sensitive data (home contact) access can view home address, home phone, home email, and home pager fields for a worker.

If a role doesn't have access to sensitive or semi-sensitive data, then all users belonging to the role cannot view the associated fields on the pages in the Worker and Case components.

Warning! When users have access to sensitive or semi-sensitive data, the system enables them to edit some pages. If a user modifies a field in PeopleSoft Enterprise CRM, the changes could be overwritten the next time that a PeopleSoft HCM message is transmitted to PeopleSoft Enterprise CRM because the information comes to PeopleSoft Enterprise CRM through a one-way transmission from PeopleSoft HCM.

See Also

[Workforce Management](#)

Predefined Security Roles and Sample Users

PeopleSoft provides several roles with predefined user profiles and permission lists in the demonstration database. You can use these sample security configurations as they are delivered, or you can modify them to meet your specific security requirements. The roles and permissions are part of the system data, and the users are part of the sample data delivered in the demonstration database.

This section discusses:

- PeopleSoft Enterprise CRM system IDs.
- PeopleSoft HelpDesk and PeopleSoft Support user IDs.
- PeopleSoft Integrated FieldService user IDs.
- PeopleSoft financial services industry user IDs.
- PeopleSoft communication industry user IDs.
- PeopleSoft high tech industry user IDs
- PeopleSoft government industry user IDs
- PeopleSoft Marketing user IDs.
- PeopleSoft Sales user IDs.
- PeopleSoft Order Capture and Services Management user IDs.
- PeopleSoft Order Capture Self Service user IDs.
- PeopleSoft Real-Time Advisor user IDs.

- PeopleSoft Quality user IDs.
- PeopleSoft insurance industry user IDs.
- PeopleSoft energy industry user IDs.
- PeopleSoft multichannel applications user IDs.
- PeopleSoft Partner Relationship Management user IDs.
- PeopleSoft Strategic Account Planning user IDs.
- PeopleSoft Wealth Management user IDs.

PeopleSoft Enterprise CRM System IDs

PeopleSoft delivers predefined user IDs, passwords, and associated roles for PeopleSoft Enterprise CRM.

Note. To look up role information for a user ID, select PeopleTools, Security, User Profiles, User Profiles and then click the Roles tab.

The tables that follow list the delivered PeopleSoft user IDs and passwords:

<i>User ID and Password</i>	<i>Description</i>
SYSADM	System Administrator
EMPL	Employee
MGR	Line Manager

PeopleSoft HelpDesk, PeopleSoft HelpDesk for Human Resources, and PeopleSoft Support User IDs

This table lists the predefined user IDs and passwords for PeopleSoft HelpDesk, PeopleSoft HelpDesk for Human Resources, PeopleSoft HelpDesk for Higher Education, and PeopleSoft Support:

<i>User ID and Password</i>	<i>Description</i>
CCAG	Call Center Agent
CCMGR	Call Center Manager
CRAWLING / WELCOME	HR Call Center Level One Agent USA (E-Business HRMS)

<i>User ID and Password</i>	<i>Description</i>
FKELLY / WELCOME	HR Call Center Level Two Agent UK (E-Business HRMS)
HELPAA	Help Desk Applications Administrator
HELPAG	Help Desk Agent
HELPMGR	Help Desk Manager
HHDCAN_ADMIN	HR HelpDesk Administrator (Canada)
HHDCAN_AGT1	HR HelpDesk Agent 1 (Canada)
HHDCAN_AGT2	HR HelpDesk Agent 2 (Canada)
HHDCAN_AGT3	HR HelpDesk Agent 3 (Canada)
HHDCAN_MGR	HR HelpDesk Manager (Canada)
HHDUSA_ADMIN	HR HelpDesk Administrator (USA)
HHDUSA_AGT1	HR HelpDesk Agent 1 (USA)
HHDUSA_AGT2	HR HelpDesk Agent 2 (USA)
HHDUSA_AGT3	HR HelpDesk Agent 3 (USA)
HHDUSA_MGR	HR HelpDesk Manager (USA)
HSCOTT / WELCOME	HR Call Center Level One Agent UK (E-Business HRMS)
KADDAI / WELCOME	HR Call Center Level Two Agent USA (E-Business HRMS)
MBORHO / WELCOME	HR HelpDesk Administrator (E-Business HRMS)

<i>User ID and Password</i>	<i>Description</i>
RJAMES / WELCOME	HR Self-Service Manager (E-Business HRMS)
SMARTHA / WELCOME	HR Self-Service Employee (E-Business HRMS)
SOLTNMGR	Solution Manager
SSS_AA00100	Higher Education Worker and Student
SSS_CONST	Higher Education Constituent
SSS_FACULTY	Higher Education Faculty Worker
SSS_FAO	Higher Education Financial Aid Officer
SSS_FUND	Higher Education Fundraiser
SSS_HEADMIN	Higher Education Administrator
SSS_HEAG1	Higher Education Level One Agent
SSS_HEAG2	Higher Education Level Two Agent
SSS_HEBLENDAG	Higher Education Blended Agent (IT and non-IT cases)
SSS_ITAG	Higher Education IT Agent
SSS_MKTMGR	Higher Education Marketing Manager
SSS_MKTR	Hgher Education Marketer
SSS_MKTR1	Higher Education Marketer
SSS_REC	Higher Education Recruiter
SSS_REC1	Higher Education Recruiter

<i>User ID and Password</i>	<i>Description</i>
SSS_REC2	Higher Education Recruiter
SSS_REC3	Higher Education Recruiter
SSS_RECMGR	Higher Education Recruiting Manager
SUPPAA	Support Applications Administrator
TECHSPEC	Technical Specialist

PeopleSoft Integrated FieldService User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Integrated FieldService:

<i>User ID and Password</i>	<i>Description</i>
DISPATCH	Dispatcher
FSAA	Field Service Applications Administrator
FSAG	Field Service Agent
FSENG	Field Service Engineer
FSMGR	Field Service Manager
FSPART	Field Service Partner
INVAG	Inventory Agent
INVMGR	Inventory Manager
PRODMGR	Product Manager
PURCHAG	Purchasing Agent
RECAG	Receiving Agent

<i>User ID and Password</i>	<i>Description</i>
TECHSUP	Technical Support

PeopleSoft Financial Industry User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Financial Services:

<i>User ID and Password</i>	<i>Description</i>
FSIADMIN	FSI Administrator
FSIAGENT	FSI Agent
FSISS	FSI Self-Service
FSIMGR	FSI Account Manager

PeopleSoft Communication Industry User IDs

This table lists the predefined user IDs and passwords for the PeopleSoft communication industry

<i>User ID and Password</i>	<i>Description</i>
CSPADMIN	CSP Administrator
CSPAGENT	CSPA Agent
CSPSS	Communication Self-service Consumer
GUESTCOMM	Guest - Communication

PeopleSoft High Tech Industry User IDs

This table lists the predefined user IDs and passwords for the PeopleSoft high technology industry.

<i>User ID and Password</i>	<i>Description</i>
HITECHADMIN	High Technology Administrator

<i>User ID and Password</i>	<i>Description</i>
HITECHAGENT	High Technology Agent
HITECHSS	High Technology Self-Service
HITECHGUEST	High Technology Guest

PeopleSoft Government Industry User IDs

This table lists the predefined user IDs and passwords for the PeopleSoft government industry.

<i>User ID and Password</i>	<i>Description</i>
GOVADMIN	Government Administrator
GOVAGENT	Government Agent
GOVSS	Government Self Service
GOVGUEST	Government Guest
GOVMGR	Government Manager

PeopleSoft Marketing User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Marketing:

<i>User ID and Password</i>	<i>Description</i>
CAMPMGR	Campaign Manager
MKTAA	Marketing Application Administrator
MKTANAL	Marketing Analyst
MKTCRT	Marketing Creative
MKTMGR	Marketing Manager

<i>User ID and Password</i>	<i>Description</i>
MKTRES	Marketing Researcher
SRVCONA	Service Contract Administrator
TELAG	Telemarketing Agent
TELFFLAG	Telemarketing Fulfilment Agent
TELMGR	Telemarketing Manager
TELSLAG	Telemarketing Sales Agent

PeopleSoft Sales User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Sales:

<i>User ID and Password</i>	<i>Description</i>
SLSREP	Inside Sales Rep
FLDSLSREP	Field Sales Rep
SLSMGR	Sales Manager
LDQUAL	Lead Qualifier
SLSAA	Sales Application Administrator
CHSLSMGR	Channel Sales Manager

PeopleSoft Order Capture and Services Management User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Order Capture and Services Management:

<i>User ID and Password</i>	<i>Description</i>
OCADMIN	Order Capture Administrator
OCMGR	Order Capture Manager
OCREP	Order Capture Representative
FSIADMIN	FSI Administrator
FSIAGENT	FSI Agent
CSPADMIN	CSP Administrator
CSPAGENT	CSPA Agent
INSADMIN	Insurance Administrator
INSAGENT	Insurance Agent
ENERGYADMIN	Energy Administrator
ENERGYAGENT	Energy Agent

PeopleSoft Order Capture Self Service User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Order Capture Self Service:

<i>User ID and Password</i>	<i>Description</i>
CPCUST	Customer
CPSS	Customer Self Service
CSPSS	Communication Self-Service Consumer
GUEST	Guest
COMGUEST	Guest - Communication

<i>User ID and Password</i>	<i>Description</i>
ENERGYGUEST	Guest - Energy
GOVGUEST	Guest - Government
GUESTCOMM	Guest - Communication
HITECHGUEST	High Technology Guest
INSGUEST	Insurance Guest
USGUEST	Guest - US001 (USA)

PeopleSoft Real-Time Advisor User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Real-Time Advisor:

<i>User ID and Password</i>	<i>Description</i>
RADADMIN	Advisor Administrator
RADUSR	Advisor User
RADMGR	Advisor Manager

PeopleSoft Quality User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Quality:

<i>User ID and Password</i>	<i>Description</i>
QAANAL	Quality Analyst
QAAA	Quality Application Administrator
QAMGR	Quality Manager

PeopleSoft Insurance Industry User IDs

This table lists the predefined user IDs and passwords for PeopleSoft insurance industry:

<i>User ID and Password</i>	<i>Description</i>
INSADMIN	Insurance Administrator
INSAGENT	Insurance Agent
INSSS	Insurance Self-Service
INSGUEST	Insurance Guest

PeopleSoft Energy Industry User IDs

This table lists the predefined user IDs and passwords for PeopleSoft energy industry:

<i>User ID and Password</i>	<i>Description</i>
ENERGYADMIN	Energy Administrator
ENERGYAGENT	Energy Agent
ENERGYSS	Energy Self-Service
ENERGYGUEST	Guest - Energy

PeopleSoft Multichannel Applications User IDs

This table lists the predefined user IDs and passwords for users implementing PeopleSoft multichannel applications:

<i>User ID and Password</i>	<i>Description</i>
ERMSMGR	ERMS Manager
ERMSAGENT	ERMS Agent

PeopleSoft Partner Relationship Management User IDs

This table lists the predefined user IDs and passwords for users implementing PeopleSoft Partner Relationship Management:

<i>User ID and Password</i>	<i>Description</i>
ECM	Enterprise Channel Manager
PADMIN	Partner Administrator
PMGR	Partner Manager
PREP	Partner Rep
PMKTA	Partner Marketing Analyst
PMKTM	Partner Marketing Manager

PeopleSoft Strategic Account Planning User IDs

This table lists the predefined user IDs and passwords for users implementing PeopleSoft Strategic Account Planning:

<i>User ID and Password</i>	<i>Description</i>
AASH	Account Administrator
ACCOUNTMGR	Account Manager

PeopleSoft Wealth Management User IDs

This table lists the predefined user IDs and passwords for users implementing PeopleSoft Wealth Management:

<i>User ID and Password</i>	<i>Description</i>
WMADMIN	Wealth Management Administrator
FA	Financial Advisor

Pages Used to Set System-Wide Security Options

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Security Options	SECURITY_OPTIONS	Set Up CRM, Security, Security Options, Security Options	Select the type of security to implement (user or permission list) and the key fields that are controlled by the security settings.

Page Name	Definition Name	Navigation	Usage
Apply Security Setups	RUN_FIN9001	Set Up CRM, Security, Apply Security Setups, Apply Security Setups	Initiate the process that activates the selected security options.
Security Views Names	SECURITY_VIEWS	Set Up CRM, Security, Security View Names, Security Views Names	Define the type of security for each view in the 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 for the corresponding security type.
Business Unit Security by Permission List	SEC_BU_CLS	Set Up CRM, Security, Unit by Permission List, Business Unit Security by Permission List	Grant access to a business unit by using a permission list.
Business Unit Security by User ID	SEC_BU_OPR	Set Up CRM, Security, Unit by User ID, Business Unit Security by User ID	Grant access to a business unit by using a user ID.
TableSet Security by Permission List	SEC_SETID_CLS	Set Up CRM, Security, TableSet by Permission List, TableSet Security by Permission List	Grant access to a tableset using a permission list.
TableSet Security by User ID	SEC_SETID_OPR	Set Up CRM, Security, TableSet by User ID, TableSet Security by User ID	Grant access to a tableset by using a user ID.
User Preferences - Overall Preferences	OPR_DEF_TABLE_RB1	Set Up CRM, Security, User Preferences, Overall Preferences	Define overall preferences for a specified PeopleSoft user.
User Preferences - Call Center Preferences	OPR_DEF_TABLE_RC	Set Up CRM, Security, User Preferences, Call Center	Define preferences for call center agents and other users of the Case component.
User Preferences - Sales Preferences	OPR_DEF_TABLE_RSF	Set Up CRM, Security, User Preferences, Sales	Define preferences for sales representatives.
Change Management	OPR_DEF_TABLE_RG	Set Up CRM, Security, User Preferences, Change Management	Select user default values that you want the system to display on the Change Request page in PeopleSoft HelpDesk.

Page Name	Definition Name	Navigation	Usage
Account	OPR_DEF_TABLE_RSP	Set Up CRM, Security, User Preferences, Account	Select default values that you want the system to use when it does account assignments.
Secured Worker Role	RB_ROLE_WORKER	Set Up CRM, Security, Secured Worker Role, Secured Worker Role	Define user roles that can access sensitive and semi-sensitive worker information.

Selecting System-Wide Security Options

Access the Security Options page (Set Up CRM, Security, Security Options, Security Options).

Security Options page

Type of Security

No Security

Select to disable PeopleSoft application security. All users who are authorized to access a page can select any valid setID or business unit. PeopleSoft Enterprise CRM applications are delivered with security disabled.

User ID Level Security and Permission List Level Security

Select to enable PeopleSoft application security by user ID or permission list. Each option controls which rows of data a user can see based on user ID or permission list.

Secured Fields

Business Unit

Select to implement security for the Business Unit field, which is the primary key for many transactional data tables. In some situations, the Business Unit field is a non-key field on a record.

SetID

Select to implement security for the SetID field, which is the primary key for many setup and rules tables. In some situations, the SetID field is a non-key field on a record.

Activating Security Options

Access the Apply Security page (Set Up CRM, Security, Apply Security Setups, Apply Security Setups).

Apply Security Setups page

Select the language that you are using to apply security and then click Run to load the security views that you created.

It is highly recommended that you clear the application server cache after the *Apply Security* process has completed. Check the process monitor to determine when the process has finished.

Use the `RD_CACHE_DEL` application engine program to clear the application cache.

One way to run this program is directly from the operating system command line:

- Navigate to the `<%PS_CFG_HOME>\bin\client\winx86` directory.
- Enter the following command: `psae -CT <dbtype> -CS <server> -CD <database name> -CO <oprid> -CP <oprpswd> -R <run controlid> -AI <program id> -I <process instance>`

As an example, a user operating with a Microsoft database named `CR910TST` on a server named `ADDB0123` might type `psae -CT MICROSOFT -CS ADDB0123 -CD CR910TST -CO PS -CP PS -R CRM -AI RD_CACHE_DEL -I 1`

Application Engine programs can also be submitted online from the Application Engine Request page. PeopleTools, Application Engine, Request AE)

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Engine, Managing Application Engine Programs*.

Defining View Security

Access the Security View Names page (Set Up CRM, Security, Security View Names, Security Views Names).

Security View Names					
Security Views					
*Search Text	*No Security View	*User ID Security View	*Permission List Security View	Type	
EO_SETID_	EO_SETID_NONVW	EO_SETID_OPRVW	EO_SETID_CLSVW	SetID	+
RBF_INT_ISS_	RBF_INT_ISS_VW	RBF_INISS_OPRVW	RBF_INISS_CLSVW	Unit	+
RBF_SRVLG_	RBF_SRVL_GS_VW	RBF_SRVLG_OPRVW	RBF_SRVLG_CLSVW	SetID	+
RBF_SRVL_GS_	RBF_SRVL_GS_VW1	RBF_SRVLG_OPRVW	RBF_SRVLG_OPRVW	SetID	+
RBG_CMPGN_	RBG_CMPGN_VW	RBG_CMPGN_OPRVW	RBG_CMPGN_CLSVW	Unit	+
RBI_BO_QUOTE_	RBI_BO_QUOTE_VW	RBI_QUOTE_OPRVW	RBI_QUOTE_CLSVW	SetID	+
RBT_C_ACCT_	RBT_C_ACCT_VW	RBT_CACCT_OPRVW	RBT_CACCT_CLSVW	SetID	+
RBT_C_BILL_	RBT_C_BILL_VW	RBT_CBILL_OPRVW	RBT_CBILL_CLSVW	SetID	+

Security View Names page

Search Text Displays the view name prefixes supplied by each application. When you run the Apply Security Setups process, the system searches 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 that you selected in the security options. 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 the system on this page.

Note. There is no need to access this page unless you want to implement customized security views.

No Security View Displays the different security views for the view name prefixes that are supplied by each application.

User ID Security View When you run the Apply Security Setups process, the Application Engine process can switch to the Permission List Security View (CLSVW), the User ID Security View (OPRVW) or the No Security View (NONVW) based on the option you selected on the Security Options page.

Permission List Security View

Type Select the type of field (*SetID* or *Unit*) that the security view affects.

Defining Business Unit Security by Permission List

Access the Business Unit Security by Permission List page (Set Up CRM, Security, Unit by Permission List, Business Unit Security by Permission List).

Business Unit Security by Permission List

Primary Permission List CRRB2025

Accessible Business Units			
Find	View All	First	Last
APP01		Appliances	+ -
APP05		Appliances Truck Fleet	+ -
AUS01		Australia Operations	+ -
CAN01		CANADA OPERATIONS	+ -
DEU01		GERMANY OPERATIONS	+ -

Business Unit Security by Permission List page

Select the business units to which you want the permission list to have access.

Note. PeopleSoft does not deliver any business units that are associated with permission lists. You must make this association using the Business Unit Security by Permission List page.

Defining Business Unit Security by User ID

Access the Business Unit Security by User ID page (Set Up CRM, Security, Unit by User ID, Business Unit Security by User ID).

Business Unit Security by User ID

User ID BLEE

Accessible Business Units			
Find	View All	First	Last
CAN01		CANADA OPERATIONS	+ -
BLG01		BELGIUM OPERATIONS	+ -
DEU01		GERMANY OPERATIONS	+ -

Business Unit Security by User ID page

Select the business units to which you want the user ID to have access.

Note. PeopleSoft does not deliver any business units that are associated with user IDs. You must make this association using the Business Unit Security by User ID page.

Defining TableSet Security by Permission List

Access the TableSet Security by Permission List page (Set Up CRM, Security, TableSet by Permission List, TableSet Security by Permission List).





TableSet Security by Permission List			
Primary Permission List AEAE1000			
Accessible Table Sets			
Find View All  First 1-3 of 3 Last			
*SetID			
<input type="text" value="CANAB"/> 	Canada - Alberta	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="CANMB"/> 	Canada - Manitoba	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="CANBC"/> 	Canada - British Columbia	<input type="button" value="+"/>	<input type="button" value="-"/>

TableSet Security by Permission List page

Select the setIDs to which you want the permission list to have access.

Defining TableSet Security by User ID

Access the TableSet Security by User ID page (Set Up CRM, Security, TableSet by User ID, TableSet Security by User ID).

TableSet Security by User ID			
User ID CC587			
Accessible Table Sets			
Find View All  First 1-3 of 3 Last			
*SetID			
<input type="text" value="HRHDC"/> 	HR Help Desk Canada	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="HRHDU"/> 	HR Help Desk USA	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="IN100"/> 	Insurance	<input type="button" value="+"/>	<input type="button" value="-"/>

TableSet Security by User ID page

Select the setIDs to which you want the user ID to have access.

Defining Overall Preferences

Access the Overall Preferences page (Set Up CRM, Security, User Preferences, Overall Preferences).

Overall Preferences

User ID FSENG
Description Perry, David L

Overall Preferences

Business Unit US200 CRMCO APPLIANCES
SetID CRM01 Appliance
As of Date 01/01/2001
Localization Country USA United States
Requester CVP1
Role Type ID
Company Name
Partner Relationship Type
***Market** Global
Order Capture Unit US200
PIM Preference ID
Duplicate Parm Set
User Interface Mode
☐ **Alternate Character Enabled**
☐ **Wealth Management**

Overall Preferences page

Note. User preferences are associated with user IDs. When you create user IDs for implementation team members and PeopleSoft users, define preferences for each user.

- | | |
|----------------------|--|
| Business Unit | Select the user's default business unit. Select a business unit that is valid for the pages that the user normally accesses. |
| SetID | Select the default setID for this user. The setID represents a set of control table information. SetIDs enable business units to share a set of control table information. |
| As of Date | Select the default date to use as the as of date when running date-driven reports and processes. |

Localization Country	Select the country code for the localization country.
Requester	<p>Enter a default requester ID to appear on requisitions that are initiated by this user from the Manage Material component in PeopleSoft Integrated FieldService or the RMA Form (return material authorization form) component in PeopleSoft Support.</p> <hr/> <p>Important! If you integrate with PeopleSoft Purchasing, the requester ID must be a valid user ID and requisition requester in PeopleSoft Purchasing.</p> <hr/>
Role Type ID	If a self-service user has multiple roles, select the role type to use as the default when signing in to the self-service site. The only supported role types for self-service users are individual consumer (role type 9) and contact (role type 8).
Company Name	For self-service users who can represent multiple companies, select the company whose data appears when the contact first signs in.
Partner Relationship Type	Select the type of partner relationship that the user has with the company. This relationship appears when the contact first signs in. For every Partner Users that uses the PARTNER portal must have a user preference record that identifies the Partner Company and the relationship type of the user with the Partner Company.
Market	Select the preferred market for the user ID. The preferred market associated with the user ID determines what data and functionality are available to the user.
Order Capture Unit	<p>Select the order capture unit that you want the system to use as a default for the user. This business unit is used by Order Capture, Order Capture Self Service, and product catalog.</p> <p>The system uses this business unit to derive the setID that is used to retrieve product catalogs the selected user can access (including PeopleSoft Order Capture Self Service guest user IDs). If this business unit is not specified, the system looks up the order capture business unit (marked as default business unit) that is defined under Set Up CRM, Business Unit Related, Order Capture Definition, Business Unit, Order Capture Definition.</p> <p>See <i>PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook</i>, "Defining Order Capture Business Units."</p>
PIM Preference ID (personal information manager preference ID)	Select the preference ID that you want the system to use if the user is a personal information manager.
Duplicate Parm Set	This field is not used now in PeopleSoft CRM. No value is required for this field.

User Interface Mode	<p>(optional) Select a preferred mode for the GUI (graphical user interface) solution of the Advanced Configurator to display configuration sessions, which are initiated from orders for configuring multilevel product bundles and multilevel installed products. Values are:</p> <p><i>Expert</i></p> <p><i>Step-by-step</i></p> <p><i>Super wizard</i></p> <p><i>Tabular</i></p> <p>This field value, if specified, is passed to the Configurator's GUI solution to determine the display mode of configuration sessions. By default, this option is not used in the sample GUI solution that is delivered as part of the multilevel product bundle offering. While this option is potentially available, it's the responsibility of custom GUI solutions to enable it for presenting product configuration sessions.</p>
Alternate Character Enabled	<p>Select to activate the fields that support alternate character functionality in application pages that are so enabled. The alternate character fields do not appear on application pages until you select this check box.</p>
Wealth Management	<p>Select if the user is a client manager. When the user accesses the PeopleSoft Strategic Account Planning application, the system opens the My Clients page.</p>

See Also

Chapter 3, "Setting Up General Options," Setting Up Alternate Characters, page 32

Defining Call Center Preferences

Access the Call Center page (Set Up CRM, Security, User Preferences, Call Center).

User ID HHDUSA_AGT1
Description Salinger, Claudia

Default Business Unit and Display Template ID Customize Find First 1 of 1 Last

Primary	*Template Family	*Component	*Business Unit	*Display Template ID
<input checked="" type="checkbox"/>	CRM_HHD	RC_CASE	HRH DU	CRM_HHD

Frequently Used Solution

Maximum Solutions to Display 10

EBS Security

Responsibility Name US HRHD Agent Responsibility

Responsibility Application US HRHD Agent Responsibility

Security Group Name Standard

Organization ID 204

Call Center page

Default Business Units

Primary

Select this check box if you want the system to use the display template, component, market, and business unit as the user's primary default.

Selecting a primary business unit provides the system with a default for items that are call-center related. It does not affect functionality that is business-unit driven such as the category/type/detail setup table default or solution searching in self-service.

Template Family

Select the display template family that you want the system to default to for the user. Once an agent opens a case, however, the agent cannot change the display template family. Depending on how you configure your system, an agent can use different display templates to view information for the same case.

See *PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook*, "Defining Call Center Business Units and Display Template Options," Display Template Families.

Component

Select the component that you want the system to default to for the user. Components can be associated with multiple display templates, each of which provides a different presentation of a page.

Business Unit

Select the business unit that you want the system to default to for the user for the display template, component, and market.

Display Template ID

Select the display template that you want the system to default to for the user. Display templates enable you to control the appearance and behavior of components (pages or sets of pages) for your various business needs.

Frequently Used Solution

Maximum Solutions to Display Enter the maximum number of solutions that are to appear on the Frequently Used Solutions page.

EBS Security

Enter values in this section of the page if implementing the integration between PeopleSoft CRM HR HelpDesk and Oracle E-Business Human Resources.

Responsibility Name Enter the Responsibility Name to be passed to the Oracle E-Business Human Resources system as part of the security authorization for this user.

Responsibility Application Enter the Responsibility Application to be passed to the Oracle E-Business Human Resources system as part of the security authorization for this user.

Security Group Name Enter the Security Group Name to be passed to the Oracle E-Business Human Resources system as part of the security authorization for this user.

Organization ID Enter the Organization ID to be passed to the Oracle E-Business Human Resources system as part of the security authorization for this user.

See Also

PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook, "Defining Call Center Business Units and Display Template Options"

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Configuring Display Templates"

Defining Sales Preferences

Access the Sales page (Set Up CRM, Security, User Preferences, Sales).

Overall Preferences

Call Center

Sales

Change Management

Account

User ID

ACCOUNTMGR

Description

Account Manager

Sales Defaults

Sales Business Unit

US300

CRMCO Hardware/Software

Tree Name

WORLD

WORLD

Assignment Group

CRM02 - SALES

CRM02 - SALES

Field Delimiter

,

Auto Insert to My Contacts

Yes

Default Filter Set

Customize

*Language Code

English

*Filter Set ID

+

-

Sales Preferences page

Sales Defaults

- Sales Business Unit

Select the assigned business unit.
- Tree Name

Select the default sales territory tree to which the sales user can be assigned.
- Assignment Group

Select in what kind of assignment group that you want this sales user to appear.

Note.

Assignment group is part of territory assignment criteria.
- Field Delimiter

Choose to use delimiters other than the comma, such as the semicolon. This is used for lead import.
- Auto Insert to My Contacts

Select to enable the user to automatically insert contacts for a company, person, lead, or opportunity to the user's My Contacts list. The insert is triggered when the user clicks the Add to My Contacts toolbar button and the user is either an account owner or account team member for the company, person, lead, or opportunity.

See Also

PeopleSoft Enterprise Sales 9.1 PeopleBook, "Setting Up Sales Security and Personalization"
Chapter 22, "Working with Contacts," page 403

Defining Change Management Preferences

Access the Change Management page (Set Up CRM, Security, User Preferences, Change Management).

The screenshot displays the 'Change Management Defaults' configuration page. At the top, there are tabs for 'Overall Preferences', 'Call Center', 'Sales', 'Change Management' (selected), and 'Account'. Below the tabs, the user information is shown: 'User ID ACCOUNTMGR' and 'Description Account Manager'. The main section, titled 'Change Management Defaults', contains the following fields:

Field	Value	Description
Request Type	SOFT	Software
Sub Type	UPGD	Upgrade
Status	NEW	New
Business Reason	PROB	Problem/Incident Resolution
Priority	MEDM	Medium
Category	SIGN	Significant
Impact	SIGN	Significant
Template ID	MODEL1A	Software emergency

Change Management page

Select the values that you want the system to display by default for the user on to the Change Request page in PeopleSoft HelpDesk.

See Also

PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook, "Using Change Management"

Defining Account Preferences

Access the Account page (Set Up CRM, Security, User Preferences, Account).

Overall Preferences

Call Center

Sales

Change Management

Account

User ID

ACCOUNTMGR

Description

Account Manager

Account Assignment

Customize

Find

View All

First

1 of 1

Last

*Assignment Owner	*Tree Name	*Assignment Group	
Account Management	WORLD	CRM02 - SALES	

Account page

Select the values that you want the system to use when it assigns accounts to the user.

See Also

PeopleSoft Enterprise Bill Presentment and Account Management 9.1 PeopleBook, "Getting Started with PeopleSoft Enterprise Bill Presentment and Account Management"

Defining Roles with Access to Sensitive Worker Information

Access the Secured Worker Role page (Set Up CRM, Security, Secured Worker Role, Secured Worker Role).

Secured Worker Role									
Role Access to Data									
Customize Find View All 1-19 of 19 First Last									
*Role Name	Description	Confidential Information		Home Contact Methods		Correct Job Details			
CSP Admin	CSP Admin	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input type="checkbox"/>			
ENERGY ADMIN	Energy Admin User Role	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input type="checkbox"/>			
FSI Account Manager	FSI Account Manager	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input type="checkbox"/>			
FSI Administrator	FSI Administrator	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input type="checkbox"/>			
GOV Admin	GOV Administrator	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input type="checkbox"/>			
HRHD Level One Agent CAN	HRHD Level One Agent CAN	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>			
HRHD Level One Agent USA	HRHD Level One Agent USA	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>			
HRHD Level One Agent USF	HRHD Level One Agent USF	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>			
HRHD Level Three Agent CAN	HRHD Level Three Agent CAN	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			
HRHD Level Three Agent USA	HRHD Level Three Agent USA	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			
HRHD Level Three Agent USF	HRHD Level Three Agent USF	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			
HRHD Level Two Agent CAN	HRHD Level Two Agent CAN	<input type="checkbox"/>		<input checked="" type="checkbox"/>		<input type="checkbox"/>			
HRHD Level Two Agent USA	HRHD Level Two Agent USA	<input type="checkbox"/>		<input checked="" type="checkbox"/>		<input type="checkbox"/>			
HRHD Level Two Agent USF	HRHD Level Two Agent USF	<input type="checkbox"/>		<input checked="" type="checkbox"/>		<input type="checkbox"/>			
HRHD Manager	HRHD Manager	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			

Secured Worker Role page

Note. This security applies to the worker component only, not the case. You may use a HelpDesk for Human Resources case template, which displays some of these fields in the Case component, without checking these security options.

Role Access to Data

Role Name	Select the role that needs access to sensitive and semisensitive data. The roles that are defined in the example are from sample data that PeopleSoft delivers with the application. If you want to create your own roles and use them here, you must first define them in the Roles component. Select PeopleTools, Security, Permissions & Roles, Roles.
Confidential Information	Select this check box to enable the role to have access to these worker fields: Gender, DOB (date of birth), Age, National ID, and Employee Status.
Home Contact Methods	Select this check box to enable the selected role to have access to these worker fields: Home Address, Home Phone, Home Email, and Home Pager.
Correct Job Details	Select this check box to allow the selected role to view and change all existing rows and to add new rows with no effective date restrictions. Otherwise, the selected role can change only future rows and enter new rows with an effective date greater than the current row.

See Also

PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook, "Defining EIP Options for Integration to PeopleSoft or Oracle E-Business HRMS"

Implementing Self-Service Security

To implement self-service security, use the Security Privilege (RB_SRTY_PRIV_DELTA), Role Privilege (RB_SRTY_PRIV_DFLT), Guest Registration (RX_GUEST_REG_TMPLT), Customer Registration (RX_CUST_REG_TABLE), Representative Registration Table (RX_REP_REG_TABLE), Security Privilege (RB_SRTY_PRIV), and Registration Text Setup (RX_REGTXT_SETUP), components.

This section provides overviews of privilege codes and custom privilege codes and discusses how to:

- Establish privilege codes and custom privilege codes.
- Assign privileges to users.
- Assign privileges to roles.
- Set up existing customer user registration templates.
- Register business users.
- Set up guest users.
- Set up terms and conditions for self-service users.
- Set up terms of service for self-service users.
- Set up privacy policies for self-service users.

Understanding Privileges Codes

The self-service functionality within PeopleSoft Enterprise CRM applications includes a predefined set of privilege codes. Assign these privilege codes to users or roles to provide security for particular types of transactions, as defined in the usage column in this table:

<i>Privilege Code</i>	<i>Description</i>	<i>Usage</i>	<i>Is Amount Associated?</i>
ORDERSAVE	Save orders.	Enable users to save orders. (The button is available or unavailable.)	No.
QUOTESAVE	Save quotes.	Enable users to save quotes. (The button is available or unavailable.)	No.

<i>Privilege Code</i>	<i>Description</i>	<i>Usage</i>	<i>Is Amount Associated?</i>
ADDRMAINT	Maintain existing address.	Enable users to update existing addresses. (The button is available or unavailable.)	No.
ADDRMAINTCNT	Maintain existing contact.	Enable users to update existing contacts.	No.
ADDRNEW	Add new address.	Enable users to add new addresses. (The button is available or unavailable.)	No.
ADDRNEWSITE	Convert address to site.	Enable users to convert the address to site. (The button is available or unavailable.)	No.
ADDRNEWCNTCT	Add new contact person.	Enable users to add a new contact person. (The button is available or unavailable.)	No.
NEWACCT	Create new account.	Enable users to create a new account.	No.
VIEWALLORDRS	View all orders.	Enable users to view all orders placed by others with an amount less than the amount specified. (The rows are available or unavailable.)	Maybe. You can use the operator code for less than (<) or less than or equal to (<=) to include a dollar amount.
VIEWALLQUOTS	View all quotes.	Enable users to view all quotes that were placed by others with an amount that is less than the amount specified. (The rows are available or unavailable.)	You can use the operator code for less than (<) or less than or equal to (<=) to include a dollar amount.

Understanding Custom Privilege Codes

You can define your own privilege codes and associate them with transactions on the User Privileges page and Role Privileges page. After you define the privilege codes, you must add the custom code to the transaction that has the custom security level.

To define a privilege code that prevents consumers from ordering more than 100,000 USD worth of goods:

1. Define the Order Amount privilege code (CUSTORDAMT).
2. On the Role Privileges page, assign the privilege code to the individual consumer role and specify that the amount must be less than 100,000 USD.
3. On the FieldChange event of the Order Submit button, add the following code:

```
Declare Function IsTransactionAuthorized PeopleCode FUNCLIB_RB.SRTY_PRIV_CD Field=
Formula;

Local number &output_msg_set_nbr, &output_msg_nbr;

If Not IsTransactionAuthorized(&roleType, &strPersonID, &numBOIDCustomer,
    CUSTORDAMT, &numAmount, &output_operator_cd, &output_amount_qty, &output_msg_set_
nbr, &output_msg_nbr) Then
    If All(&output_msg_set_nbr, &output_msg_nbr) Then
        Error MsgGet(&output_msg_set_nbr, &output_msg_nbr, "Message Not Found.");
    End-If;
End-If;
```

In the preceding code example, pass &roleType as 9 (the Individual Consumer role). Pass &strPersonId as the person ID, and pass &numBOIDCustomer as the customer's business object ID. The privilege code is CUSTORDAMT, which is your defined custom privilege code. &numAmount is the amount of the customer's order. The remaining parameters are output parameters that you do not need to pass.

Use the delivered PeopleSoft Enterprise CRM self-service code as an example to customize security of other transactions.

Pages Used to Implement Self-Service Security

Page Name	Definition Name	Navigation	Usage
Security Privilege Code Setup	RB_SRTY_PRIV	Set Up CRM, Security, Self-Service, Privilege Codes, Security Privilege Code Setup	Define the privileges that are associated with the privilege codes.
Assign User Privileges	RB_SRTY_PRIV_DELTA	Set Up CRM, Security, Self-Service, User Privileges, Assign User Privileges	Assign user privileges.
Assign Role Privileges	RB_SRTY_PRIV_DFLT	Set Up CRM, Security, Self-Service, Role Privileges, Assign Role Privileges	Assign privileges to roles.
Existing Customer User Registration Setup	RX_CUST_REG_TABLE	Set Up CRM, Security, Self-Service, Existing Customer Registration, Existing Customer User Registration Setup	Create templates of records and fields to be used on the User Registration Setup page.

Page Name	Definition Name	Navigation	Usage
Business User Registration Setup	RX_REP_REG_TABLE	Set Up CRM, Security, Self-Service, Business User Registration, Business User Registration Setup	Register business users.
User Registration Setup	RX_GUEST_TEMPLATE	Set Up CRM, Security, Self-Service, User Registration, User Registration Setup	Register guest users.
Self Service Registration	RX_REGTXT_SETUP	Set Up CRM, Security, Self-Service, Terms and Conditions, Self Service Registration	Set up terms and condition statements for users completing self-service registration.
Terms of Service	RX_TERMS_SETUP	Set Up CRM, Security, Self-Service, Terms and Conditions, Terms of Service	Set up terms of service statements for users completing self-service registration.
Privacy Policy	RX_PRIVACY_SETUP	Set Up CRM, Security, Self-Service, Terms and Conditions, Privacy Policy	Set up privacy policy statements for users completing self-service registration.

Establishing Privilege Codes and Custom Privilege Codes

Access the Security Privilege Code Setup page (Set Up CRM, Security, Self-Service, Privilege Codes, Security Privilege Code Setup).

Security Privilege Code Setup

Privilege Code ADDRMAINT

***Description**

Security Privilege Code Setup page

Enter a description of the privilege code that you are adding.

Assigning Privileges to Users

Access the Assign User Privileges page (Set Up CRM, Security, Self-Service, User Privileges, Assign User Privileges).

Assign User Privileges

Person ID 200011 Name Jordan, Kevin

User Privileges								Customize	Find	First	1-11 of 11	Last
Business Contact Name	*Privilege	Revoke	Operator	Amount	Message Set Number	Message Number						
Jordan Enterprises	Maintain existing address	<input type="checkbox"/>										
Jordan Enterprises	Maintain existing contact	<input type="checkbox"/>										
Jordan Enterprises	Add new address	<input type="checkbox"/>										
Lopez and Lee LLP	Maintain existing address	<input type="checkbox"/>										
Lopez and Lee LLP	Maintain existing contact	<input type="checkbox"/>										
Lopez and Lee LLP	Add new address	<input type="checkbox"/>										
Baseball Company	Maintain existing address	<input type="checkbox"/>										
Baseball Company	Maintain existing contact	<input type="checkbox"/>										

Assign User Privileges page

Define user privileges by associating a person with a business contact and assigning privilege codes. The business contact is typically a customer that the person represents. The user privileges enable you to define self-service security more specifically than the role privileges.

For example, suppose that a contact's role privileges do not enable the contact to update customer address information. If you need to enable a particular contact to update addresses, you could do that by assigning the user privilege to that contact. Conversely, suppose that a contact's role can submit a quote, but you want to revoke a particular contact's privilege to submit quotes. You do that by adding the privilege for submitting quotes and then selecting the Revoke check box.

Business Contact Name and Privilege Select the business contact's name and the privilege code.

Revoke Select to revoke a privilege.

Operator and Amount For transactions that are dependent on an amount, you can define privileges that are associated with particular amounts. If the system authenticates the user for the amount, it displays the appropriate information. For the Amount field, only numeric values are relevant; the system does not take the currency into account.

Message Set Number and Message Number Associate a default message in case of authorization failure. If authorization fails, the transaction that failed can display the default message or its own message.

PeopleSoft Order Capture Self Service is delivered with two privilege codes that are built to use privilege amounts: View All Orders (VIEWALLORDRS) and View All Quotes (VIEWALLQUOTS). These privileges are associated with an amount that further restricts access to order or quotes over a certain dollar amount.

Assigning Privileges to Roles

Access the Assign Role Privileges page (Set Up CRM, Security, Self-Service, Role Privileges, Assign Role Privileges).

Assign Role Privileges

Role Type ID 8	Description Contact				
-----------------------	----------------------------	--	--	--	--

Role Privileges						Customize	Find	View All	1-4 of 4	First	Last
*Privilege	Operator	Amount	Message Set Number	Message Number							
Order Save					+	-					
Quote Save					+	-					
View All Orders	<=	10,000,000.000	18068	12	+	-					
View All Quotes	<=	10,000,000.000	18068	12	+	-					

Assign Role Privileges page

Only two business object roles (as defined in the Customer Data Model) are supported with PeopleSoft Enterprise CRM self-service. These are consumer and contact. View the sample data for the role privileges and follow the sample as a guideline. If you have transactions for which data filtration is based on an amount, use the Amount field.

Amount Use this field if you have transactions for which data filtration is based on an amount.

Message Set Number and Message Number Associate a default message in case of authorization failure. If authorization fails, the transaction that failed can display the default message or its own message.

Setting Up Existing Customer User Registration Templates

Access the Existing Customer User Registration Setup page (Set Up CRM, Security, Self-Service, Existing Customer Registration, Existing Customer User Registration Setup).

Existing Customer User Registration Setup

Template EMAILNAMETMP
*Description Email and Name Template

&Copy						Customize	Find	View All	1-3 of 3	First	Last
*Record (Table) Name	*Field Name	*Field Label									
SS_EXT_USER_REG	EMAIL_ADDR	Email Address	+	-							
SS_EXT_USER_REG	FIRST_NAME	First Name	+	-							
SS_EXT_USER_REG	LAST_NAME	Last Name	+	-							

Existing Customer User Registration Setup page

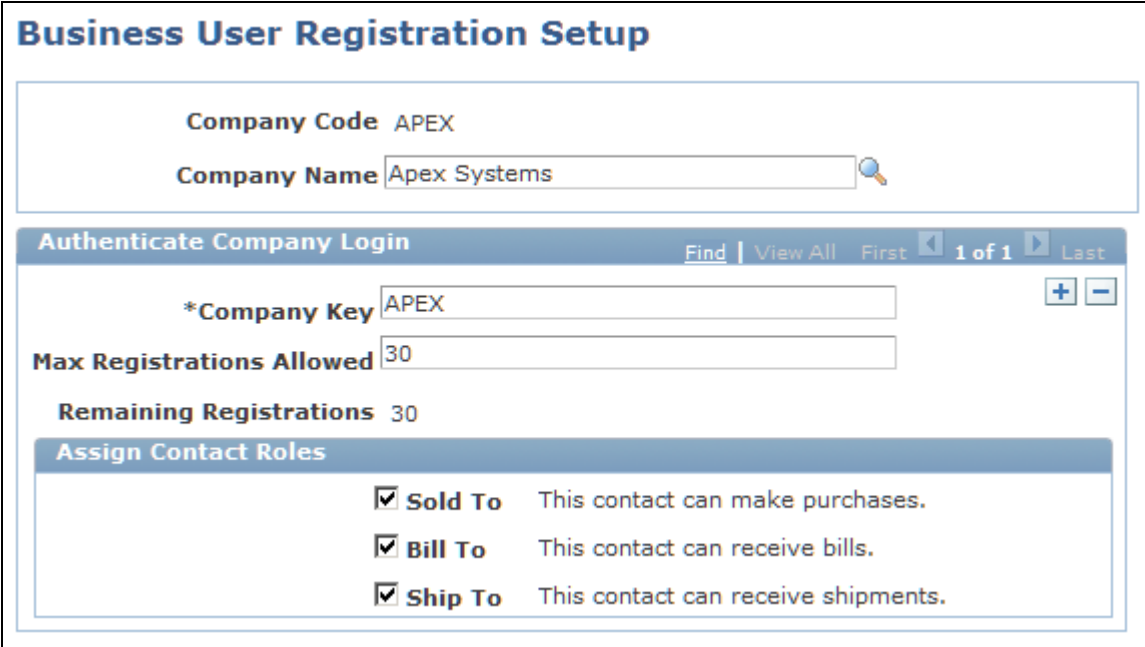
Use this page to set up templates for the fields and records that you want to use for customer registration. Once you save the template, you can select it from the Template field within the Customer Registration Fields group box on the User Registration Setup page.

When you set up existing customer user registration, you specify the information that customers enter to verify their status as existing customers. The system uses this as a template that appears for customers to enter the information

Note. For security reasons, set up at least two keys that are known only to the user.

Registering Business Users

Access the Business User Registration Setup page (Set Up CRM, Security, Self-Service, Business User Registration, Business User Registration Setup).



Business User Registration Setup page

To administer self-registration as a business user (a contact of a company), use the Business User Registration Setup page to establish a company code and password (company key).

The company name is the company for whom you are setting up the registration keys. When a self service user or external company administrator uses the company key to register, the user that is created by the system is tied to the company defined on this page.

Company Key Enter a value that you provide to a company administrator so that their users can self-register and gain access to the site. The company code and key are used to authenticate users who attempt to register at the self-service site.

Max Registrations Allowed (maximum registrations allowed) Enter the number of users that are permitted to register with this specific company code.

Assign contact Roles

Select *Sold To*, *Bill To*, or *Ship To* to establish the capacity of the business users that represents the company.

Setting Up Guest Users

Access the User Registration Setup page (Set Up CRM, Security, Self-Service, User Registration, User Registration Setup).

User Registration Setup

User IDENERGYGUEST

Confirm Guest Password

*Password

••••••••••

Password Security Policy

☐ Password Never Expires

☐ Password Expires in0Days

Copy Default Consumer Options

Consumer Name

Energy Guest

Permission Lists

*Process Profile

ALLPAGES

*Primary

ALLPAGES

Customer Registration Fields

Template ID

Terms and Conditions

Terms and Conditions

SetIDENERGY

Transfer To

☒ Catalog

☐ Customer Care

User Registration Setup page (1 of 2)

Grant Consumer Role (s)			
Customize Find [Grid Icon] [Print Icon] First 1-2 of 2 Last			
*Role Name	Description		
Consumer	Consumer	+	-
PAPP_USER	Enterprise Portal User	+	-

Grant Business User Role (s)			
Customize Find [Grid Icon] [Print Icon] First 1-2 of 2 Last			
*Role Name	Description		
Customer	Customer	+	-
PAPP_USER	Enterprise Portal User	+	-

User Registration Setup page (2 of 2)

Self-service security is controlled by privileges that you establish and assign to guest user IDs. When a user registers, the system clones the currently active guest ID, with all its access privileges, to create the new user ID, and then creates the necessary customer or consumer record in the CRM database.

See [Chapter 20, "Setting Up Customer Self-Service," Setting Up Guest IDs to Access Self-Service Sites, page 355.](#)

To administer registration through PeopleSoft Enterprise CRM self-service, you must set up a guest user ID. The guest user acts as an administrator and provides the defaults that are necessary to establish new users.

User ID

Displays the guest user ID, which is used to make the self-service site available to anonymous users. You can add several guest users. Associate each guest user with a different business unit that is defined on the User Preferences page. By defining several guest users, you can provide access to different self-service sites that support different segments of the business.

For example, suppose that the user ID *GUEST* is associated with business unit US001, which sells sporting good products. The user ID *GUESTCOMM* is associated with business unit COM01, which sells telecommunications products. When you implement these sites, you can define both guest users, and users can access either site depending on the guest user ID that they supply.

Similarly, you can make the language of a site dependent on the guest user ID.

Password

Enter the exact password that authenticates the guest user. The user ID and password in combination are either appended to the URL string that provides direct access to the site or is placed in the config.properties file in PeopleTools installation.

Refer to the installation instructions for more information about installing direct access to your website.

Password Never Expires Select one of these values to indicate when the password expires. If you select **Password Expires in Days** and **Password Expires in Days**, enter the number of days.

Consumer Name	Select the template that you want to use for the consumer name. Guest users visiting the self-service site might create their own accounts but only provide minimal information, such as user ID, password, name, email, phone, and address information. The guest user does not enter other required information, such as currency, payment method, and carrier information, which appears by default from the template consumer.
Process Profile and Primary	Assign an appropriate permission list that has access to run batch processes. This permission list is copied to the new user that is created through self-service.
Template	Select the template that contains the fields and records that you want to use for guests using self-service registration.
Terms and Conditions	Select the template that contains the terms and conditions, terms of service, and privacy statements that you want to use for guests using self-service registration.
Catalog and Customer Care	Select the item to which you want to direct self-service users.
Role Name	<p>Grant roles for consumer and business users by selecting role names from the lists in the Grant Consumer Role(s) and Grant Business User Role(s) grids. You can add as many roles as you want. When a consumer is created, the consumer roles that you specify are assigned to the new consumer user; and when a business user is created, the business user roles that you specify are assigned to the new business user.</p> <p>To enable guest users to create their own user IDs, you must define the roles that a guest user can grant to create self-service users.</p> <p>For example, in the delivered sample data, the GUEST role and the PeopleTools role UPG_ALLPAGES can grant the consumer role. When the VP1 user signs in to set up the guest user registration, that user can select the consumer role. When the guest user or an anonymous user registers as a consumer, the system assigns the new user to the consumer role.</p>

See Also

[Chapter 20, "Setting Up Customer Self-Service," page 351](#)

Setting up Terms and Conditions for Self-Service Users

Access the Terms and Conditions - Self Service Registration page (Set Up CRM, Security, Self-Service, Terms and Conditions, Self Service Registration).

Self Service Registration
Terms of Service
Privacy Policy

Terms and Conditions Setup

Please enter Self Service Registration Text, Terms of Service Statement, and Privacy Policy Statement.

SetID: SHARE

Terms and Conditions: GUEST

Self Service Registration ☒ **Default**

```

<table border='3' cellpadding='0' cellspacing='0' >
<tr>
<td valign='top' align='LEFT'>
By submitting your registration information, you indicate that you agree to the %
TERMS_OF_SERVICE and have read and understand the %PRIVACY_POLICY.
Your submission of this form will constitute your consent to the collection and use of this
information and the transfer of this information to the United States or other countries for
processing and storage. You also agree to receive required administrative and legal
notices such as this electronically.
</td>
</tr>
</table>

```

Terms and Conditions - Self Service Registration page

Enter the text for the terms and conditions that you want users to see during self-service registration.

Setting up Terms of Service for Self-Service Users

Access the Terms and Conditions - Terms of Service page (Set Up CRM, Security, Self-Service, Terms and Conditions, Terms of Service).

Self Service Registration
Terms of Service
Privacy Policy

Terms and Conditions Setup

Please enter Self Service Registration Text, Terms of Service Statement, and Privacy Policy Statement.

SetID: SHARE

Terms and Conditions: GUEST

Terms of Service

<pre> <table border='0' cellpadding='0' cellspacing='0' > <tr> <td height='40'></td> <td colspan='4' valign='top' align='LEFT'> Terms of Use </td> </tr> <tr> <td colspan='3' valign='top' align='LEFT'> 1. Introduction and Acceptance of Terms of Use. PeopleSoft, Inc. ("PeopleSoft") offers you a wide range of content, communication tools, forums, and information about its products and services ("Materials") via this web site. By using this web site, you are agreeing to accept and comply with the terms and conditions of use as stated below ("Terms of Use"), which PeopleSoft may update at any time without notice. You should visit this page periodically to review the then-current Terms of Use. Please note that PeopleSoft may, at its sole discretion, terminate your access to this web site at any time without notice. </td> </pre>
--

Terms and Conditions - Terms of Service page

Enter the text for the terms of service that you want users to see during self-service registration.

Setting up Privacy Policies for Self-Service Users

Access the Terms and Conditions - Privacy Policy page (Set Up CRM, Security, Self-Service, Terms and Conditions, Privacy Policy).

Self Service Registration
Terms of Service
Privacy Policy

Terms and Conditions Setup

Please enter Self Service Registration Text, Terms of Service Statement, and Privacy Policy Statement.

SetID: SHARE

Terms and Conditions: GUEST

Privacy Policy

```

<table border='0' cellpadding='0' cellspacing='0' >
<tr>
  <td height='40'></td>
  <td colspan='4' valign='top' align='LEFT'>
    <span class='PAPAGETITLE' >PeopleSoft Privacy Statement</span>
  </td>
</tr>
<tr>
  <td colspan='3' valign='top' align='LEFT'>
    PeopleSoft, Inc. ("PeopleSoft") respects your privacy and is committed to
    protecting your personal information that you provide to us. This statement explains
    our policies and practices regarding the use and disclosure of your personal
    information by PeopleSoft. Please note that, PeopleSoft reviews and updates this
    Privacy Policy from time to time as needed without notice. Therefore, you should
    review the terms of this policy periodically to make sure that you are aware of how
    PeopleSoft collects and uses personal information. By using our web site, you consent
    to the collection and use of your personal information by PeopleSoft as explained
    below.
  </td>

```

Terms and Conditions - Privacy Policy page

Enter the text for the privacy policy that you want users to see during self-service registration.

Defining Application Security

To define application security, use these components:

- Security Profile Definition (RSEC_PROFILE_DEFN).
- Security Membership Definition (RSEC_MEMBER_DEFN).
- Security View Definition (RSEC_VIEW_DEFN).
- Security Function Definition (RSEC_FUNC_DEFN).
- Security Function Group (RSEC_FUNC_GROUP).
- Security Object Definition (RSEC_OBJECT_DEFN).

- Security Builder (RSEC_BUILDER_RUN).
- Security Static Transfer Menu (RSEC_STAT_MENU).

This section discusses how to:

- Define security objects.
- Add membership list names and descriptions.
- Select membership objects and object members.
- Select the membership type.
- Add members to a static membership list.
- Choose the dynamic criteria for the membership list.
- Add view list names and descriptions.
- Select view objects and options.
- Select the view type.
- Add members to static view list.
- Choose the dynamic criteria for the view list.
- Define functional options.
- Define functional option groups.
- Add functional option groups and view lists to the security profile.
- Add membership lists to the security profile.
- Set run controls for the list build process.
- Enter static member transfer paths.

Pages Used to Define Application Security

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Security Object	RSEC_OBJECT_DEFN	Set Up CRM, Security, CRM Application Security, Security Object, Security Object	Define the characteristics of the security object.
Add Membership List	RSEC_MEMBER_SMRY	Set Up CRM, Security, CRM Application Security, Add Membership List, Add Membership List	Enter the membership list name and description.

Page Name	Definition Name	Navigation	Usage
Add Membership List	RSEC_SRTY_WIZ1	Click Next at the bottom of the first Add Membership List page.	Select the membership object and the members to which you want the security object to apply.
Add Membership List	RSEC_SRTY_WIZ2	Click Next at the bottom of the second Add Membership List page.	Select the membership type.
Add Membership List (static)	RSEC_ML_PARTNER RSEC_ML_CUSTOMER RSEC_ML_PART_C RSEC_ML_PERSON RSEC_ML_ROLE	Select Static and then click Next at the bottom of the third Add Membership List page.	Select the partners, partner contacts, customers, people, or roles that you want to add to the membership list.
Add Membership List (dynamic)	RSEC_PARTNER_SRCH RSEC_CUSTOMER_SRCH, RSEC_PART_CON_SRCH RSEC_PRSN_SRCH	Select Dynamic and then click Next at the bottom of the third Add Membership List page.	Choose the dynamic criteria that you want to use to select either customers, partners, partner contacts, or persons.
Add View List	RSEC_VIEW_SMRY	Set Up CRM, Security, CRM Application Security, Add View List, Add View List	Enter the view list name and description.
Add View List	RSEC_SRTY_WIZ1	Click the Next button from the first Add View List page.	Select the security object and the members to which you want the security object to apply.
Add View List	RSEC_SRTY_WIZ2	Click Next from the second Add View List page.	Select the view type.
Add View List (static)	RSEC_VL_CATALOG RSEC_VL_CUSTOMER RSEC_VL_HOLD RSEC_VL_RA_METRICS	<ul style="list-style-type: none"> For catalog, hold codes, and metrics, click Next from the second Add View List page. For customers, click Next from the third Add View List page. 	View the criteria that you chose to select customers.
Add View List (dynamic)	RSEC_CUSTOMER_SRCH	Click Next at the bottom of the third Add View List page.	Choose the dynamic criteria that you want to use to select customers.
Functional Option	RSEC_FUNC_DEFN	Set Up CRM, Security, CRM Application Security, Functional Option, Functional Option	Define functional options, including enabling amount-related fields, conditional operators, application classes, and messages.

Page Name	Definition Name	Navigation	Usage
Functional Option Group	RSEC_FUNC_GROUP	Set Up CRM, Security, CRM Application Security, Functional Option Group, Functional Option Group	Group functional options.
Security Profile	RSEC_PROFILE	Set Up CRM, Security, CRM Application Security, Add Security Profile, Security Profile	Define a security profile.
Security Profile - Membership	RSEC_PROFILEMEMBER	Set Up CRM, Security, CRM Application Security, Add Security Profile, Membership	Add membership lists to the security profile.
Refresh Dynamic Lists	RSEC_BUILDER_RUN	<ul style="list-style-type: none"> Set Up CRM, Security, CRM Application Security, Refresh Dynamic Lists, Refresh Dynamic Lists Click Run from the Security Profile page. 	Set run controls for the List Build process.
Static Menu Transfer Path	RSEC_STAT_MENU	Set Up CRM, Security, CRM Application Security, Static Menu Transfer Path, Static Menu Transfer Path	Enter static menu transfer paths.

Defining Security Objects

Access the Security Object page (Set Up CRM, Security, CRM Application Security, Security Object, Security Object).

Security Object

Save Run Search Next Previous Refresh Add Security Object

Object ID PARTNER Object Name Partner

Security Object Definition

*Object Name Partner *Object Type Membership
Description Partner Security Object
*View Record RSEC_SL_PTNR_VW *Security List Record RSEC_ML_PARTNER
Object Source Navigation Partner Search Static List Navigation Partner Static Member List
Cache Option Scheduled Always

Security Object Options

☒ Allow Dynamic Members ☒ Allow Reuse
☐ Secure All ☒ Allow All
☒ Allow Multiple Members ☒ Allow Single Member
☒ Show In Wizard

Related Security Objects

Related Object	Name
CATALOG	Catalog
CUSTOMER	Customer
METRIC	Performance Metric

Add Related Security Object

Security Object page

Object Type

Select either *Membership* or *View Privilege*. The Object type determines whether the Security Object is used for defining Membership List or View List.

View Record

View record is used to resolve the list of members for a dynamic membership or view list. The view record must be a distinct subset of the search record that is used in defining the search for dynamic criteria.

Security List Record

Select the record where you want the system to store the results of the query or static list that is associated with the security object. The security list record may vary for each security object.

Object Source Navigation

Select the object source to which you want the system to navigate while creating dynamic membership or view lists. Selecting the object source that corresponds to the security object that you are creating provides for the proper transfer of the object source during the creation of dynamic membership or view lists. Data searches that are enabled for application security are only available as part of the selection. It is important to choose the correct search definition for the security object.

Static List Navigation	<p>Select the static list that you want the system to navigate to during the creation of the security profile.</p> <p>This is the navigation that is used for entering static list data or viewing static list data that is either dynamically created or manually entered. You set up static list navigations on the Static Menu transfer page. The system builds the Static List page with the static list record as a level 1 grid.</p>
Cache Option	<p>Select the cache option that you want the system to use for the security object. The caching option is mainly used for partner and customer security. Basically, when a customer or a partner is added or updated in the Customer Data Model (CDM), it tells the system how often to cache the list members in the list tables and run the Application Engine job that creates the dynamic queries.</p>

Security Object Options Select one or multiple security object options values:

- *Allow Dynamic Members:* Select this check box if you want to create dynamic membership or view lists.
- *Allow Reuse:* Select this check box if you want to create lists that can be associated with more than one security profile. If you clear this check box, the static or dynamic lists that you create can be attached to only a single security profile, and the security list record for these security objects will contain the security profile value.

Note. This check box is used for performance reasons. When you select this check box, the system adds the security profile ID to the Security List Table. Using this option enables the system to make a three-table join and retrieve results quickly. For example, in FSI the account holders and accounts are accessed directly through a join from the Security List tables of the account and account holders, which are joined with the Security Profile table.

- *Secure All:* Select this check box if you want the system to apply the view record on the security object definition. If you clear this check box, no security is applied on the view record. Clearing this check box also causes applications to skip the security check.

Note. This check box is used for performance reasons. For example, if one of your security profiles is set up to give access to *All*, the security API will not return any data. It is implied that the calling application would display everything. In this situation users in Order Capture Administration have access to all hold codes. When the Order Capture application calls the Security API, the Security API gives the administrators access to all hold codes. In the code for the Order Capture application the system doesn't have to create an extra *Where* clause to show the filtered list of hold codes.

Note. If you clear this check box, the SQL API returns a state status of three (3). If the SQL string that is returned contains SQL, then security must be applied. Empty strings cause the system to skip the security check. ERROR (or some other constant) indicates that the context has access to no security profiles and zero rows should be returned.

- *Allow All:* Select this check box if you want the system to display the All field when you are adding view or membership lists to the security profile.
- *Allow Multiple Members:* Select this check box if you want the system to display the Multiple List as an available option when you are creating a view or membership lists.
- *Allow Single Member:* Select this check box if you want the system to display the Single Member as an available option when you are creating a view or membership list.
- *Show In Wizard:* Select this check box if you want the system to display the security object as a selectable option in the drop-down list box when you are creating membership or view lists.

Related Security Objects Select the security objects that you want to be available with a security profile. For example, if a Membership-type security object is defined and associated with two related View-type security objects, then if a Security Profile is created using the same Membership object, only the two related objects that were specified on the Security Object page will be visible as options in the Security Object drop down list that appears after selecting the Add View List option for that Security Profile.

Warning! Note that as delivered, the system is designed to only process certain combinations of membership and view objects, and that these combinations apply only to certain products (applications) within the system. These combinations are shown in the accompanying table. Only these combinations should be used when setting up your data. Other combinations are not supported in the system as delivered, and would require customized coding to implement.

When adding values to the Related Security Objects field, the supported combinations are:

Membership Object	View Object	Product (Application Usage)
<i>ACCOUNTHOLDER</i> (Financial Account Holder)	<i>ACCOUNT</i> (Financial Account)	Financial Services Industry
<i>CUSTOMERMEMBER</i> (Customer)	<i>CATALOG</i> (Catalog)	Order Capture
<i>PARTNER</i> (Partner)	<i>CATALOG</i> (Catalog)	Order Capture
<i>PARTNER</i> (Partner)	<i>CUSTOMER</i> (Customer)	All
<i>PARTNER</i> (Partner)	<i>METRIC</i> (Performance Metric)	Marketing
<i>PARTNERCONTACT</i> (Partner Contact)	<i>CATALOG</i> (Catalog)	Order Capture
<i>PARTNERCONTACT</i> (Partner Contact)	<i>METRIC</i> (Performance Metric)	Marketing
<i>PERSON</i> (Person)	<i>CATALOG</i> (Catalog)	Order Capture
<i>PERSON</i> (Person)	<i>HOLDCODE</i> (Hold Code)	Order Capture
<i>ROLE</i> (Role)	<i>HOLDCODE</i> (Hold Code)	Order Capture

Adding Membership List Names and Descriptions

Access the Membership List page (Set Up CRM, Security, CRM Application Security, Add Membership List, Add Membership List).

Add Membership List

Enter the membership list name and description
The membership list you create will be associated to a security profile. Choose the active status to use the list immediately after creation.

Membership List Definition	
*Name	Partner Resellers
*Status	Active
Description	Partners authorized to sell XBR line of products.

Next >

Add Membership List page

Enter a name for the membership list that you want to create. Select the *Active* status. Enter text that describes the type of membership list that you are creating.

Selecting Membership Objects and Object Members

Access the Add Membership List page (click Next at the bottom of the first Add Membership List page).

Add Membership List

Select the membership object and the object members
Select the object type and then select the membership option that best meets your needs.

Select Membership Object	
*Security Object	Partner

Membership Applies To	
<input type="radio"/> All	- Use this option to give permission to everyone
<input checked="" type="radio"/> Multiple Members	- Use this option to give permission to a specific set of members
<input type="radio"/> Single Member	- Use this option to give permission to a single member

< Back Next > Cancel

Add Membership List page

Security Object

Select the security object that you want to use for your membership list:

- *Customer*
- *Partner*
- *Partner Contact*
- *Person*
- *Role*

Note. You can also create your own security object and select it from this list. You would, however, need to call the delivered security APIs at runtime to access security.

Membership Applies To

Indicate to whom you want the membership list to apply. Select:

- *All:* Select if you want the membership list to apply to all members associated with the security object.
- *Multiple Members:* Select if you want the membership list to apply to select group of members that are associated with the security object. When you click Next, the system displays the next Add Membership List page, where you can select the membership type that you want to use (either dynamic or static).
- *Single Member:* Select if you want the membership list to apply to a single member associated with the security object. When you click Next, the system displays the page that is associated with the security object (either customers, partners, partner contacts, persons, or roles).

Next

Click to go to the next page. The system displays a new page based on the selections that you have made on the previous Add Membership List pages.

Selecting the Membership Type

Access the Add Membership List page (click Next at the bottom of the second Add Membership List page).

Add Membership List

Select the membership type
 The membership type can be static or dynamic. A static type will let you pick from a list of object members. A dynamic type will let you build a SQL query to define criteria for the list.

Membership Type

☒ **Dynamic** - Use this option to define a criteria for the members

☐ **Static** - Use this option to enter a static list of members

< Back
Next >
Cancel

Add Membership List page

Membership Type

Select from these values:

- *Dynamic*: Select to choose a dynamic list of members. When you click Next, a search page appears based on the security object that you selected on the second Add Membership List page.
- *Static*: Select to choose a static list of members. When you click Next, a page appears based on the security object that you selected on the second Add Membership List page.

Next

Click to go to the next page. The system displays a new page based on the selections that you made on the previous pages.

Adding Members to a Static Membership List

Access the Add Membership List (static) page (select Static and then click Next at the bottom of the third Add Membership List page).

*SetID	Partner Name
CRM01	Madison Reese

Buttons: Add Partner, < Back, Cancel, Finish

Add Membership List (static) page

This page displays different fields based on the security object you selected on the previous page. Select the setID (if this field appears) and the role, customer, partner, partner contact, or person that you want to add to the membership list. Click the Add button to add new members.

Choosing the Dynamic Criteria for the Membership List

Access the Add Membership List (dynamic) page (select Dynamic and then click Next at the bottom of the third Add Membership List page).

Add Membership List

Choose dynamic criteria for the Partners

The criteria you choose will determine the Partners included in the membership. Select the Preview button to view the Partner members that meet the criteria you entered.

Preview Partner Members
[Customize](#) | [Find](#) | [View All](#) | | [First](#) | **1-2 of 2** | [Last](#)

Partner Name	DUNS Number	Address	City	State	Country	Partner Status
Alliance Group		14410 Union Ave	San Jose	CA	USA	Active
EIP, Inc.		800 W Shoreline Ave	Mountain View	CA	USA	Active

Choose Dynamic Criteria

*SetID

=

SHARE

SHARE

Company

begins with

DUNS

begins with

Status

=

Active

Partner Program Name

begins with

Phone

begins with

Address

begins with

City

begins with

State

begins with

Postal

begins with

Country

=

USA

United States

Company ID

begins with

Preview

Clear

< Back

Cancel

Finish

Add Membership List page

Select or enter the criteria that you want to use to create a membership list. The system uses the criteria that you select to create a dynamic membership list. To view the results of the criteria that you enter, click the Preview button. When you are satisfied with the results, click the Finish button at the bottom of the page.

If a security object (for example, customer or partner) that returns in the search result has multiple addresses, the system displays all addresses as individual entries in the search result regardless of other search criteria. For example, if the object that returned is associated with two addresses, one in CA (California) and the other in NY (New York), you see both entries in the search result even if the search criteria indicate that only CA entries should be returned.

Adding View List Names and Descriptions

Access the View List page (Set Up CRM, Security, CRM Application Security, Add View List, Add View List).

Add View List

Enter the view list name and description
The view list you create will be associated to a security profile. Choose the active status to use the list immediately after creation.

View List Definition	
*Name	Sydney Customers
*Status	Active
Description	Customers distributing the XBR2 product in the western region.

Next >

Add View List page

Enter a name for the view list that you want to create. Select the *Active* status. Enter text that describes the type of view list that you are creating.

Selecting View Objects and Options

Access the Add View List page (click the Next button from the first Add View List page).

Add View List

Select the view object
Select the object type and then select the view option that best meets your needs.

Select View Object	
*Security Object	Customer

View Applies To	
<input type="radio"/> All	- Use this option to give permission to everyone
<input checked="" type="radio"/> Multiple Members	- Use this option to give permission to a specific set of members
<input type="radio"/> Single Member	- Use this option to give permission to a single member

< Back Next > Cancel

Add View List page

Security Object

Select the security object that you want to use for your view list. Choose from one of these delivered values:

- *Catalog*
- *Customer*
- *Hold Codes*
- *Performance Metric*
- *Financial Accounts*

Note. You can also create your own security object and select it from this list.

View Applies To

Select one of these values to indicate to whom you want the view list to apply:

- *All:* Select this value if you want the view list to apply to all members associated with the security object.
- *Multiple Members:* Select this value if you want the view list to apply to select group of members that are associated with the security object. When you click Next, the system displays the next Add View List page, where you can select the view type that you want to use (either dynamic or static).
- *Single Member:* Select this value if you want the view list to apply to a single member associated with the security object. When you click Next, the system displays the page that is associated with the security object (either hold codes, catalogs, performance metrics, or customers).

Next

Click to go to the next page. The system displays a new page based on the selections that you made on the previous Add View List pages.

Selecting the View Type

Access the Add View List page (click Next from the second Add View List page).

Add View List

Select the view type
The view type can be static or dynamic. A static type will let you pick from a list of object members. A dynamic type will let you build a SQL query to define criteria for the list

View Type

☒ **Dynamic** - Use this option to define a criteria for the members

☐ **Static** - Use this option to enter a static list of members

Add View List page

View Type

Select one of these values:

- *Dynamic*: Select to define criteria for a dynamic list of members that you want included in your view list. When you click Next, a search page appears based on the security object that you selected on the second Add View List page.
- *Static*: Select to choose a static list of members. When you click Next, a page appears based on the security object that you selected on the second Add View List page.

Next

Click to go to the next page. The system displays a new page based on the selections that you made on the previous pages.

Adding Members to Static View List

Access the Add View List (static) page (for catalog, hold codes, and metrics, click Next from the second Add View List page).

Add Customer To View List

Customers Customize Find View All First 1 of 1 Last

*SetID	Customer Name
CRM0	MD Engineering

Add Customer

< Back Cancel Finish

Add View List (static) page

This page displays different fields based on the security object that you selected on the previous page. Select the setID (if this field appears) and the catalog, customer, hold code, or performance metric that you want to add to the view list.

Choosing the Dynamic Criteria for the View List

Access the Add View List (dynamic) page (click Next at the bottom of the third Add View List page).

Add View List

Choose dynamic criteria for customers

The criteria you choose will determine which customers are included in the view list. Click the Preview button to view the customers that meet the criteria you entered.

Preview Customer Members

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

Customer Name
Maretec Ltd.
Balmoral Wholesalers

Choose Dynamic Criteria

Name

=

SetID

=

First Name

begins with

Last Name

begins with

Role

=

Address

begins with

City

begins with

State

begins with

NSW

Postal

begins with

Country

=

AUS

Region

=

Partner On Order

bind

Gender

=

Product ID

=

Industry ID

=

Preview

Clear

< Back

Cancel

Finish

Add View List page

Select or enter the criteria that you want to use to create a view list. The system uses the criteria that you select to create a dynamic view list. To see the results of the criteria that you enter, click the Preview button. When you are satisfied with the results, click the Finish button at the bottom of the page.

Defining Functional Options

Access the Functional Option page (Set Up CRM, Security, CRM Application Security, Functional Option, Functional Option).

Functional Option

Save | Search | Next | Previous | Refresh | Add Option

Functional Option Code AFTSFunctional Option Automatic Fund Transfer

Functional Option Definition

*Functional OptionAutomatic Fund Transfer

DescriptionAutomatic Fund Transfer

Conflict Resolution

☐ Revoke Wins

Amount Related

☒ Related To Amount

☐ Maximum Amount Wins

☒ Use Conditional Operator

Base CurrencyUS Dollar

Display Logic

Application Class ID

Application Class Path

Option Value Translate Field

Functional Option page (1 of 2)

Default Message Set

Message Set Number18146

Messages

Customize | Find | First 1 of 1 Last

*Denial Reason

Denied. Reason: 2 Signers required

Add Message

Audit Details

Date Created09/05/2001 5:10PM PDTFSISYSTEM

Last Modified09/05/2001 5:10PM PDTFSISYSTEM

Functional Option page (2 of 2)

Functional Option and **Description** Enter a name for the functional option and then enter a description.

Revoke Wins	<p>Conflicts may happen when a user is associated with multiple security profiles using functional options that conflict or when the same security profile has overrides for conflicting functional options. Select this check box if you want the system to not override the security for the functional option that you are creating when there are conflicts within or among different security profiles.</p> <hr/> <p>Note. If one functional option group grants an option and another revokes it, the revoke takes precedence. If the Revoke Wins check boxes are not selected in the same scenario, the option is granted.</p> <hr/>
Related to Amount	Select to enable amount-related fields during the setup of functional option groups and specific functional options within the security profile.
Maximum Amount Wins	Select this check box to indicate that you want the maximum amount to win when there are functional options that conflict within or among different security profiles
Use Conditional Operator	Select to enable the conditional operator field during the setup of functional option groups and specific functional options within the security profile for amount-related fields.
Base Currency	Select the currency that is used most often for the functional option that you are creating.
Application Class ID, Application Class Path, and Option Value Translate Field	<p>Use these fields if you are writing PeopleCode programs required to evaluate the functional option. Select the ID and path of the application class that the system carries out when a user accesses the function or when the program runs. Also, you can specify a value translate field with values that will be interpreted by the calling application to perform a specific functional action. For example, the display template uses a translate field that makes the fields display-only or changeable.</p> <p>See <i>PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook</i>, "Configuring Display Templates."</p>
Message Set Number and Denial Reason	Select the message that you want the system to display if a user is denied access to the function.

Defining Functional Option Groups

Access the Functional Option Group page (Set Up CRM, Security, CRM Application Security, Functional Option Group, Functional Option Group).

Functional Option Group

Save | Search | Next | Previous | Refresh | Add Option Group

Functional Option Group Code MKT_FIELDS **Functional Option Group** Secured Marketing Fields

Functional Option Definition

*Functional Option Group Secured Marketing Fields

Description Secured marketing fields for a partner user.

Functional Options Customize | Find | First 1-2 of 2 Last

Functional Option Amount Related

*Functional Option	Option Value	Revoke
Marketing Display Only Fields	Display On	<input type="checkbox"/>
Marketing Hidden Fields		<input checked="" type="checkbox"/>

Add Functional Option

Audit Details

Functional Option Group page

Use functional option groups to group functional options. You may then associate the functional option groups with security profiles. Creating functional option groups and using them with security profiles can help make security maintenance faster and more efficient.

Functional Option Group and Description Enter a name for the functional option group and then enter a description.

Functional Option Tab

Functional Option Select the functional options that you want to include in the functional option group.

Option Value Select the value that you want to use for the functional option. This field is available for entry only if a translate field was set up on the functional option.

Revoke	<p>Select this check box if you want the system to override the security for the functional option when there are conflicts within or among different security profiles.</p> <hr/> <p>Note. Revoke applies to the functional option only (for example, does a user have authorization to transfer money). If one functional option group says yes and another says no, the functional option that has the <i>Revoke Wins</i> check box selected wins and resolves the conflict.</p> <p>For transfer amounts, there is another type of conflict resolution called <i>Max Amount Wins</i>. In this situation, if one functional option group gives you access to 2000 USD and another gives you access to 3000 USD, the maximum amount wins and you have the authority to transfer up to 3000 USD.</p> <hr/>
Add Function Option	Click to add a new row in the functional option grid.
<i>Amount Related Tab</i>	
The fields that appear on this page are used if the functional option is associated with an amount field.	
Conditional Operator	Select the conditional operator (for example, equal to, less than, greater than, and so on) that you want to use for the functional option.
Amount	Enter the amount that you want associated with the conditional operator for the functional option.
Denial Reason	<p>Select the reason that you want the system to display if the user is denied access to the transaction related to the functional option.</p> <p>For example, let's say you have given order capture representatives the ability to override prices. At some point in the season, you may want all of them to be denied from overriding prices on the items that you sell. You can go to the functional option group definition and set the Revoke Wins check box. From that point onward, the order capture representatives are denied from doing price overrides. You can set up similar situations for leads, opportunities, cases, and so on.</p>

Adding Functional Option Groups and View Lists to the Security Profile

Access the Security Profile page (Set Up CRM, Security, CRM Application Security, Add Security Profile, Security Profile).

Security Profile

[Save](#) | [Run](#) | [Search](#) | [Next](#) | [Add Security Profile](#)

Security Profile Name ENG250112 ACCMANProfile **Status** Active

[Security Profile](#) | [Membership](#)

Security Profile Definition

***Name** ***Status**

Description

Functional Option Group

Functional Option Group	Description
Account Manager	Account Manager functional option group

[Add Functional Option Group](#)

View List

View List	Description	Security Object	Type	Status	Last Refresh Date
BILL ACC ENG250112		Billing Account	Static	Active	04/07/2005 2:50PM

[Add View List](#)

[Audit Details](#)

Security Profile page

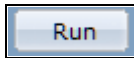
Defining security profiles involves the granting of view lists and/or functional options. You then grant or associate one or multiple membership lists with the security profile. An enterprise administrator or enterprise channel manager should know how to create and maintain security profiles, as well as understand how security is impacted when a security profile changes.

Warning! Inactivating a security profile removes the associated membership and view lists

Name and Description Enter a name for the security profile and then enter a description.

Add Functional Option Group Click to access the Functional Options Group page, where you can select the functional option groups that you want to include in the security profile. You can also use this page to view the functional options that are associated with the functional option group. The Enterprise Administrator who is assigning the Functional Option Groups must be aware of the groups that make sense for a given Membership list. Out of the box, all functional options and functional options groups that are delivered by PeopleSoft work with the 'Role' Security Membership Object. The only exception is the Financial Account Holders.

Add View List Click to access the Add View List page, where you can select the view lists that you want to include in the security profile.



Click to access the Refresh Dynamic Lists page, where you can set up a process to periodically refresh the lists that you have associated with the security profiles that you created. View lists and Membership lists that are built based on dynamic criteria are refreshed.

Adding Membership Lists to the Security Profile

Access the Security Profile - Membership page (Set Up CRM, Security, CRM Application Security, Add Security Profile, Membership).

Security Profile

Save Run | Search | Next | Add Security Profile |

Security Profile Name ENG250112 ACCMANProfile **Status** Active

Security Profile Membership

Membership List	Description	Security Object	Type	Status	Last Refresh Date	
ENG250112 ACCMANMembership		Person	Static	Active	04/07/2005 2:50PM	

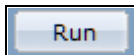
Add Membership List

[Audit Details](#)

Security Profile - Membership page

Add Membership List

Click to access the Add Membership List page, where you can select the membership lists that you want to include in the security profile.



Click to access the Refresh Dynamic Lists page, where you can set up a process to periodically refresh the lists that you have associated with the security profiles that you created. View lists and Membership lists that are built based on dynamic criteria are refreshed.

Setting Run Controls for the List Build Process

Access the Refresh Dynamic Lists page (Set Up CRM, Security, CRM Application Security, Refresh Dynamic Lists, Refresh Dynamic Lists).

Refresh Dynamic Lists

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

Summary

Press Run to process new and updated list members for All Objects.

Process Type

☐ Dynamic List Refresh
☒ New and Updated List Members
☐ Data Integrity

Process Scope

☒ All Objects
☐ Security Object Security Object Name
☐ Security Profile Security Profile Name
☐ Membership List Membership List Name
☐ View List View List Name

Refresh Dynamic Lists page

Use this page to refresh the lists, security objects, and profiles that you have created to implement security for your PeopleSoft Enterprise CRM environment. If the content of the lists, objects, and profiles changes frequently, you can set up this process to run daily, every few minutes, or every few hours.

Note. When a new user registers in Order Capture Self Service, they will not have immediate permission to view the product catalog. Application security needs to be triggered to get the appropriate product catalog access for the person who has just registered.

Process Type

Select one of these values based on the type of list that you want to refresh:

- *Dynamic List Refresh.*
- *New and Updated List Members.*
- *Data Integrity.*

Process Scope

Select one of these lists or objects that you want to refresh:

- *All Objects*
- *Security Object*
- *Security Profile*
- *Membership List*
- *View List*

Note. If you select *All Objects*, you do not need to specify the objects that you want to refresh. If you select any other value, you must use the field that corresponds to your selection to select a list, profile, or object name.

Entering Static Menu Transfer Paths

Access the Static Menu Transfer page (Set Up CRM, Security, CRM Application Security, Static Menu Transfer Path, Static Menu Transfer Path).

Static Menu Transfer Path

Static List Navigation Source

Static List Navigation Customer Static Member List

*Menu Name RSEC_SECURITY

*Menu Bar Name USE

*Item Name RSEC_ML_CUSTOMER

*Panel Item Name RSEC_ML_CUSTOMER

Audit Details

Date Created 12/16/2003 2:34PM PST dmurphy3

Last Modified 12/16/2003 2:34PM PST dmurphy3

Static Menu Transfer Path page

Use this page to create static menu transfer paths for entering or viewing static list data that is either dynamically created or manually entered. The static list navigations that you create on this page appear in the Static List Navigation drop-down list box on the Security Object page. Static list navigation is used when you create a security profile.

Chapter 5

Working with Notes and Attachments

This chapter provides an overview of notes and attachments and discusses how to:

- Set up note types.
- Create standard notes and product notes.
- Enter and view notes.
- Add attachments to notes.

Understanding Notes and Attachments

This section discusses:

- Notes in PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM).
- Attachments.
- Note types.

Notes in PeopleSoft Enterprise CRM

You can view and update notes in PeopleSoft Enterprise CRM in two ways:

1. The Notes List (RB_NOTES_LIST) component.
2. Notes pages on CRM components and transactions.

The Notes List Component

This component summarizes notes that are entered on commonly used PeopleSoft Enterprise CRM components: Lead, Opportunity, Case, Customer, Contact and Consumer, and enables you to select a note and transfer to the Notes page in the component to view and update note details.

Notes Pages

All PeopleSoft Enterprise CRM components that can have notes attached to them use the same interface; however, the Notes page itself might vary slightly depending on the parent object. For example, case notes and order notes have a visibility field that determines whether self-service users can see the note when they look at the parent object. Other objects that are not accessible through self-service do not have this field.

Note Details

The note details view displays complete information for a single note, including a list of attachments that is associated with the note.

Notes Summary

The notes summary view lists all existing notes for the component.

Notes pages on some components include a summary notes list on the same page as the note details; for other components, the summary notes list is on a separate page. The summary notes list might also be part of a more general page.

Case notes can be associated with the case itself or with a resolution in the case. The notes summary view that is in the Case component displays both types of notes together. A resolution icon identifies notes that are part of a resolution.

Attachments

When you add an attachment to a note, you identify the file to attach. Once you identify the file, the system uploads the attachment to an attachment server. The attachment server stores attachment files, which ensures that the attachments are available to all users. You configure the system by using the Uniform Resource Locator (URL) Maintenance page to specify a URL for each component that supports attachments. This setup is part of the PeopleSoft Enterprise CRM installation process.

See the installation guides on My Oracle Support.

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, stored in the ATTACHSYSFILENAME field, 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 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. The following code represents this pattern:

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

Except in the Product component, attachments are associated with a note rather than associated with the note's parent object. When you click the link for an existing attachment, the system launches the attachment. If the attachment is an executable or batch program, the system runs the program. If the attachment is any other type of file, the system handles it according to the operating system's rules, either opening the file in a new browser window, prompting for a location to download the file, or offering a choice between these two actions.

Note Types

Most differences in the Notes page for different parent objects are self-explanatory. However, there is one hidden difference: the Note Type field that appears in some components derives its values from different places depending on the parent object.

This table lists the page where you define valid note types for objects that use note types:

Parent Object	Source of Valid Note Types
Business objects: Company, Consumer, Representative, and Site	Note Type page (BC_NOTETYPE_TBL), found under Set Up CRM, Common Definitions, Notes
Case and Solution	Case and Solution Note Type page (RC_NOTETYPE), found under Set Up CRM, Common Definitions, Notes
Order/Quote, Services Management Order	Product Note Type page (NOTE_TYPE), found under Set Up CRM, Common Definitions, Notes
Campaign Detail	Translate (xlat) table.
Other objects	Notes for other objects do not include a Note Type field.

See Also

[Chapter 5, "Working with Notes and Attachments," Setting Up Note Types, page 137](#)

Setting Up Note Types

To set up note types, use the Note Types (RC_NOTETYPE) component.

This section lists the pages used to set up note types.

Pages Used to Set Up Note Types

Page Name	Definition Name	Navigation	Usage
Note Type	BC_NOTETYPE_TBL	Set Up CRM, Common Definitions, Notes, CDM Note Type, Note Type	Set up note categorization codes that you can reference on the notes pages available in the Company, Partner Company, and Person components.
Case and Solution Note Type	RC_NOTETYPE	Set Up CRM, Common Definitions, Notes, Case and Solution Note Type, Case and Solution Note Type	Set up note types that you can reference on the notes pages available in the Case and Solution components.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Product Note Type	NOTE_TYPE	Set Up CRM, Common Definitions, Notes, Product Note Type, Product Note Type	Set up note types that you can reference on the notes pages available in the Product component.

Creating Standard Notes and Product Notes

This section discusses how to:

- Create standard notes.
- Create product notes.

Pages Used to Create Standard Notes and Product Notes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Standard Notes	STD_NOTE	Set Up CRM, Common Definitions, Notes, Standard Notes, Standard Notes	Create a standard note.
Product Notes	PROD_NOTE	Product CRM, Product Notes, Product Notes	Create product notes.

Creating Standard Notes

Access the Standard Notes page (Set Up CRM, Common Definitions, Notes, Standard Notes, Standard Notes).

Standard Notes

SetID CRM01

Standard Note Code FS

Standard Notes

Find | View All | First 1 of 1 Last

*Effective Date 06/10/2008

*Status Active

*Description

*Note Type

Text

Search Key Words

View All | First 1 of 1 Last

Print On Document

First 1 of 1 Last

*Document Code

Standard Notes page

- Text

Enter up to 256 characters of text. You can modify the text, but you cannot have more than one entry.
- Search Key Words

Enter keywords to select notes for reporting.
- Print On Document

Not applicable to standard notes.

Creating Product Notes

Access the Product Notes page (Product CRM, Product Notes, Product Notes).

Product Notes

Product Refrigerator, Plastic Bins

Product ID 10000

Product Type Standard

SetID CRM01

Note Details

Find First 1 of 1 Last

*Sequence 1

*Classification Standard

Standard Note Code

Description

Note Type

Description

Text

Search Key Words

Key Word

Print On Documents

Product Notes page

- Search Key Words

Enter keywords to select notes for reporting.
- Print On Documents

Not applicable for product notes.

Entering and Viewing Notes

This section discusses how to:

- View lists of notes.
- Enter notes.

Note. Because Notes pages are always accessed within the context of a component (such as an order capture or campaign), navigational paths are not listed in this table. For the navigational path, refer to the component documentation.

Pages Used to View and Enter Notes

Page Name	Definition Name	Navigation	Usage
Notes List - Lead Notes	RB_NOTES_LIST_LEAD	Customers CRM, Notes List, Lead Notes	View a list of lead notes and access note details.
Notes List - Opportunity Notes	RB_NOTES_LIST_OPP	Customers CRM, Notes List, Opportunity Notes	View a list of opportunity notes and access note details.

Page Name	Definition Name	Navigation	Usage
Notes List - Case Notes	RB_NOTES_LIST_CASE	Customers CRM, Notes List, Case Notes	View a list of case notes and access note details.
Notes List - Customer Notes	RB_NOTES_LIST_CUST	Customers CRM, Notes List, Customer Notes	View a list of customer notes and access note details.
Notes List - Contact Notes	RB_NOTES_LIST_PRSN	Customers CRM, Notes List, Contact Notes	View a list of contact notes and access note details.
Notes List - Consumer Notes	RB_NOTES_LIST_CONS	Customers CRM, Notes List, Consumer Notes	View a list of consumer notes and access note details.
Notes	PROD_ATT RA_CAMPAIGN_NOTES RA_CONTENT_NOTE RA_LIST_NOTE RA_OFFER_NOTE RB_EMAIL_NOTE RC_CASE_NOTE RC_CASE_RSLN_NOTE RC_SOLN_NOTES RD_NOTES RE_NOTES RE_NOTE_SUMMARY RF_RMA_NOTE RO_NOTE RF_SERVICE_NOTE2 RF_SO_NOTE2 RF_SO_RSLN_NOTE RQ_DEFECT_NOTES RG_CHANGE_NOTE RSF_LEAD_NOTES RSF_OPP_NOTES	Varies by component: refer to the documentation for the parent component.	Create or update notes and add attachments.

Viewing Lists of Notes

Access the Notes List page for a lead, opportunity, case, customer, contact, or consumer (Customers CRM, Notes List).

Lead Notes	Opportunity Notes	Case Notes	Customer Notes	Site Notes	Contact Notes	Consumer Notes
------------	-------------------	------------	----------------	------------	---------------	----------------

Use Search Criteria to Narrow the Search Results

Customer Notes					Customize	Find	View All	First	1-8 of 23	Last
Note Details	Note Summary									

	Customer Name	Customer ID	Added By	Date/Time Added
	Grandma's Kitchens International	512	SREDFORD	11/06/2001 7:58:36AM
	Grandma's Kitchens International	512	SRAY	11/10/2001 1:26:52PM
	Fast Grandma's Restaurants	516	SREDFORD	11/06/2001 8:10:23AM
	Grandma Kitchens Foods Inc.	517	SREDFORD	11/06/2001 8:16:57AM
	Grandma Kitchens Foods Inc.	517	SREDFORD	11/06/2001 8:20:42AM
	Grandma's Breakfast Bakery	527	SAMPLE	11/07/2001 8:35:22AM
	Shoreview Medical	CI00532	TMURPHY	03/05/2004 11:52:12AM
	Shoreview Medical	CI00532	SAMPLE	09/23/2002 4:48:20PM

Search

Notes List - Customer Notes page: Note Details tab

Note Details

Select the Note Details tab.

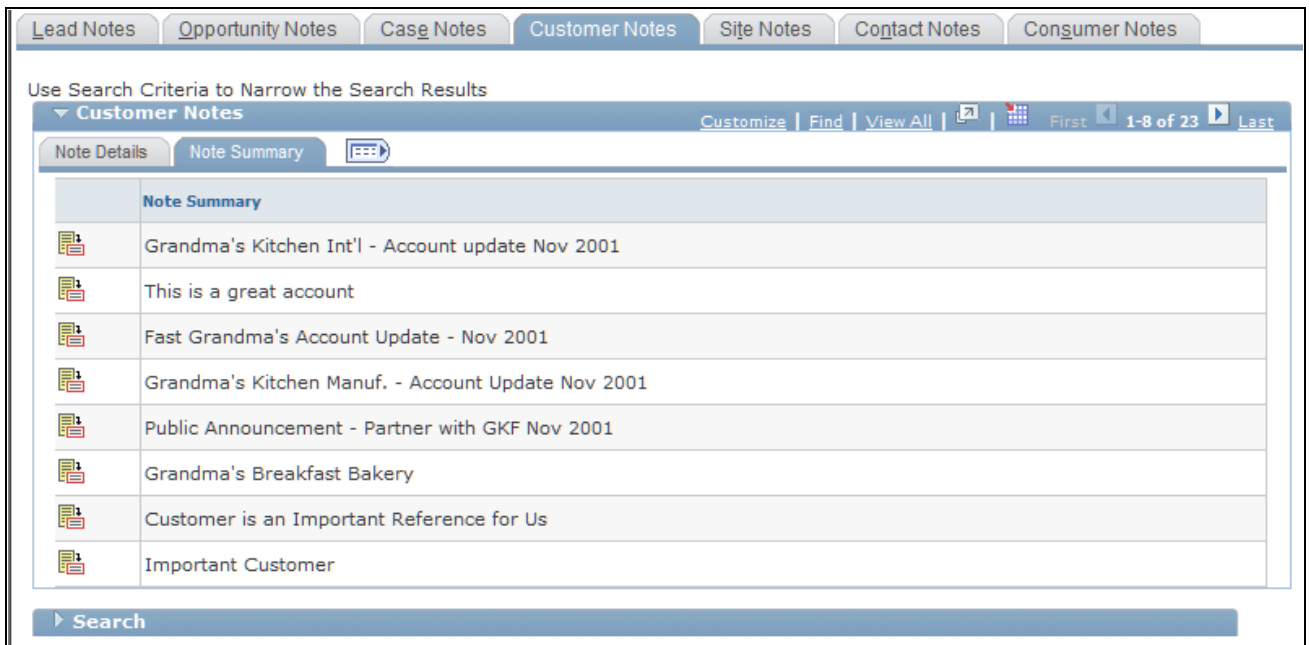


Click the View Detail button to transfer to the Notes page of the corresponding component to view note summary and details.

You can return to the notes list from the Notes page using the History field.

Note Summary

Select the Note Summary tab.



Notes List - Customer Notes page: Note Summary tab

This section displays the customer or contact name of the note and its note subject.

Entering Notes

Access the Notes page (varies by component: refer to the documentation for the parent component).

Note. This screen shot shows the Notes page of the Company component. The fundamental appearance and behavior of the Notes page is similar throughout PeopleSoft Enterprise CRM. Be aware, however, that the Notes page for some components (such as for the Support Case) also contains a rich-text editor that provides options for formatting the text.

Company

Save | 360 360-Degree View | Search | Previous | Add Company | >> Personalize

Customer University of Computer Science
Contact Anthony Brown
Phone 602/335-1144

Location Phoenix, AZ, USA
Job Title Support Manager
Email abrown@ucs.com

Summary Account Team Tasks Call Reports Billing Accounts Plans Notes Contact Info

Notes Summary Customize Find View All First 1 of 1 Last

Subject and Details	Attachment(s)	Added By	Date Added
New branch office to be opened soon Company is planning on opening a new branch office in Tuscon:		Stu Marx	09/02/2009 1:04PM

Add Note

Note Details

Added 09/02/2009 1:04PM Stu Marx

*Subject New branch office to be opened soon

Note Type Internal Note Start Date 09/15/2009 End Date

Details Company is planning on opening a new branch office in Tuscon: probably in second half of 2010

Apply Note Add an Attachment

Notes page

Notes Summary

A summary of existing notes for the component appears in this page region. If there are attachments for the note, the number of attachments appears in the Attachments column.

Email

Select a note from the list and click this button to compose and send an email using the Outbound Notification page. Any attachments associated with the note will be made available on the Outbound Notification page for inclusion in the email.

View

Select a note from the list and click this button to view the note details.

Add Note

Click this button to add a new note to the transaction.

Note Details

If no notes exist for the component, this page region is titled Add Note. and contains only an Add Note button.

Subject

Enter a short summary of the note. If you do not enter a value, the system enters the first fifty characters of the Details field into this field when you save the note.

Note Type	Select a classification for the note. Values are defined differently depending on the parent object. This functionality is not available in all components. See Chapter 5, "Working with Notes and Attachments," Note Types, page 136.
Contact Information	Used in Call Center case notes to identify a contact to be associated for this specific note.
Details	Enter the full text of the note.
Apply Note	Click to update the Notes Summary list with the note that you entered. <hr/> Note. Click the Apply Note button to add the note to the Notes Summary grid. The note is not saved to the component until you save the component. <hr/>
Add an Attachment	Click to add an attachment to the note.

Adding Attachments to Notes

This section discusses how to add attachments to notes.

Selecting a File to Add as an Attachment

To add an attachment to a note:

1. Access the Notes page for the object to which you are adding an attachment.

Note. Normally you add attachments to notes. In the Product component, however, you add attachments directly to the product.

2. Click the Add an Attachment button.

Enter the full path (including the file name) of the file to attach.

3. In the dialog box that appears, enter the full path name of the file to attach, or browse to the file.
4. Click the Upload button.

The system uploads the specified file to the server that is configured to store all of the PeopleSoft Enterprise CRM attachments. Large files may take a long time to upload. When the upload is complete, the system displays the Notes page again. If the upload was successful, the file appears on the page.

5. Add descriptive information about the file.

If the parent object is a note, you can also use the note to record a longer comment about the attachment.

6. Save the component.

Chapter 6

Using Interactive Reports

This chapter provides overviews of interactive reports and delivered system data for interactive report and discusses how to launch interactive reports.

Understanding Interactive Reports

This section discusses:

- Interactive reports and the Analytic Calculation Engine.
- Delivered report and query definitions.

Interactive Reports

PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) interactive reports are based on the PeopleSoft business analysis modeler tool Analytic Calculation Engine (ACE).

Use the interactive reports to view transactional data in multidimensional online reports. For example, a PeopleSoft Call Center business analysis modeler report might have two dimensions: customer and product. This enables users to display the number of cases in four ways—customer, product, customer within product, or product within customer.

Interactive reports can have more than two dimensions, which enable users to organize data in a variety of ways that serve various business purposes. Users drag and drop the available dimensions to reconfigure the report view as they use it. For example, in viewing a call center report, a user might add another available dimension such as *month* as a third dimension.

Users can filter interactive report data by selecting a single value for any dimension. For example, a user can limit a report so that only cases for one customer, organized by product and then by month, appear. This filtering capability provides the user with an overview of the products that are giving the customer trouble, as well as whether the number of cases that are reported against each product is decreasing or increasing.

Access to an Interactive Report is controlled by user roles. The user can export report data to Microsoft Excel or print a hard copy. While you can interact with these reports by modifying data and moving data elements (dimensions) on the reports, the communication between the report and PeopleSoft Enterprise CRM is one-way—changes you make to interactive report data are local only, and do not affect the original source data in the PeopleSoft Enterprise CRM database. Also, you cannot transfer from an interactive report to any PeopleSoft Enterprise CRM components in order to access data.

PeopleSoft ACE is a PeopleTools product. For information on installing and setting up interactive reports using ACE, see the following references listed.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Analytic Calculation Engine - Getting Started with PeopleSoft Analytic Calculation Engine

Delivered Report and Query Definitions

PeopleSoft Enterprise CRM provides these interactive report definitions:

Report Description	Application
Campaign Performance/ Forecast	Marketing
Helpdesk SLM Analysis	Support
Support Case Analytics	Support
Support SLM Analysis	Field Service
FieldService Service Order Summary	Field Service
Service Order Aging Analysis	Field Service
Utilization Rate Analysis	Field Service
Change Request Metrics	Help Desk
Forward Schedule of Changes	Help Desk
Enterprise Order Metrics	Order Capture
Enterprise Order Revenue	Order Capture
Sales Compare of Forecasts	Sales
Sales Activity Forecasts	Sales
Telesales Lead Acceptance	Telesales
Telesales Lead Quality	Telesales
Telesales Sales Conv Rate	Telesales
Telesales Sales Quality	Telesales
Dialog Performance Report	Online Marketing
Workforce Survey Analysis	Marketing

Each report has an accompanying query definition that is similarly named to the report definition.

Launching Interactive Reports

Each PeopleSoft Enterprise CRM application that delivers an interactive report provides documentation for viewing that specific report.

See *PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook*, "PeopleSoft Call Center Interactive Reports."

See *PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook*, "Working with Interactive Reports for Order Capture."

See *PeopleSoft Enterprise CRM 9.1 Workforce Communications PeopleBook*, "Analyzing Program and Dialog Results," Understanding Workforce Reports.

See *PeopleSoft Enterprise Sales 9.1 PeopleBook*, "Understanding Sales Interactive Reports."

See *PeopleSoft Enterprise CRM 9.1 Marketing Applications PeopleBook*, "Using Interactive Reports in PeopleSoft Marketing Applications."

Chapter 7

Setting Up Currencies

This chapter provides an overview of currencies and discusses how to:

- Set up currencies.
- Calculate currency exchange.

Understanding Currencies

This section discusses:

- Currency management in PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM).
- Direct and indirect rate quotations.
- Triangulation.
- Automatic reciprocation of quote methods.

Currency Management in PeopleSoft Enterprise CRM

PeopleSoft Enterprise CRM enables you to manage financial information in multiple currencies and perform currency conversions. The Currency Code table that PeopleSoft Enterprise CRM delivers defines many common currencies that are identified by the International Standards Organization (ISO) standard, including the European common currency (euro). You can update the currency definitions on this table or enter new ones.

Note. The Currency Code table supports the ISO standard of zero, two, and three decimal positions.

PeopleSoft supports direct and indirect rate quotation, quote units, and triangulation to provide you with flexible tools to convert and manage multicurrency operations. The currency quotation method controls how a stored rate appears and how an entered rate is interpreted and stored in the database.

You can set up a currency quotation method for each from and to pair of currencies that you use. Define currency quotation options before entering and calculating rates.

Direct and Indirect Rate Quotations

An exchange rate is the price of one currency, such as the British pound, in terms of another currency, such as the U.S. dollar. Exchange rates are quoted directly or indirectly. Most countries use the direct method. With this method, the exchange rate indicates how much of the local currency is exchanged for one unit of the foreign currency. For example, suppose that one has to pay .6326 pounds to obtain one dollar, the direct quotation is 1 USD = .6326 GBP.

With the indirect method the exchange rate is expressed as the amount of foreign currency that is required to purchase one unit of the domestic currency. In the preceding example, the indirect quotation is 1 GBP = 1.5814 USD.

Triangulation

Triangulation is used in hyperinflationary environments in which all conversions to the local currency are done through a reference currency—a stronger, more stable currency, such as the U.S. dollar.

For currency pairs that triangulate, you do not typically maintain rates online. Instead, the Cross Rate/Triangulation Generation SQR (Structured Query Report) uses these three exchange rates:

- 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.

Typically, you do not maintain these rates directly.

Set up the currency quotation methods 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 $(\text{From currency} / \text{RATE_DIV}) * \text{RATE_MULT} = \text{To currency}$.

For example, converting from the Russian rouble (RUR) to the Brazilian real (BRL) through the U.S. dollar (USD) is a two-step conversion. First, the RUR is converted to the USD using the appropriate triangulated rate (which uses the RUR to USD component of the triangulated rate that is stored in RATE_DIV). Second, the USD is converted to the real by using the fixed exchange rate (which uses the USD to BRL component of the triangulated rate that is stored in RATE_MULT).

It was a legal requirement to use triangulation to convert currencies participating in the euro prior to January 1, 2002. Even after an enterprise has switched over to the euro, it is necessary to keep historical data available in the national currency unit in order to maintain an audit trail. In most countries, national law requires enterprises to keep accounting records in their original form for at least 5 to 10 years. This is important to avoid synchronization problems between the legacy and the converted systems. For example, representing amounts dated before the euro came into existence in euro could cause anomalies when comparing data that was collected during the floating-rate era before January 1, 1999.

Conversion of historical data requires that you convert all instances of the same data in exactly the same way. This can cause rounding differences with non-normalized data, as is commonly the case in data warehouses that support management information systems (MIS) or decision support systems (DSS). Each organization must decide how significant such differences are in the context of the data use, which might be merely for internal trend analysis.

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, the system automatically creates this record to indicate a quote method of direct. If you change the quote method on the GBP to USD record, the system automatically updates the USD to GBP record.

This table lists each possible value with its reciprocal value:

<i>Page Element</i>	<i>Value (for RUR to BRL)</i>	<i>Reciprocal Value (for BRL to RUR)</i>
Rate Quotation Basis	Direct Indirect	Indirect Direct
Quote Units	Any value	Same value
Rate Decimal Positions	4 (default value)	Same value
Auto Reciprocate	Yes No	Yes No
Triangulate	Yes No	Yes No
Reference Currency	Any value	Same value
Primary Visual Rate	From - To (RUR - BRL) From - Reference (RUR - USD) Reference - To (USD - BRL)	From - To (BRL - RUR) Reference - To (USD - RUR) From - Reference (BRL - USD)
Cross-Rate Allow Override	Yes No	Yes No
Cross-Rate Recalculate	From - Reference (RUR - USD) Reference - To (USD - BRL)	Reference - To (USD - RUR) From - Reference (BRL - USD)

Setting Up Currencies

To set up currencies, use the Currency Code (CURR_CD_TABLE) and Currency Quotation Method (CURR_QUOTE_PNL) components.

This section discusses setting up currencies in PeopleSoft Enterprise CRM.

Pages Used to Set Up Currencies

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Currency Code	CURRENCY_CD_TABLE	Set Up CRM, Common Definitions, Currency, Currency Code, Currency Code	Add or update a currency code.
Currency Quotation Method	CURR_QUOTE_PNL	Set Up CRM, Common Definitions, Currency, Currency Quotation Method, Currency Quotation Method	Set up and maintain a currency quotation method for each from currency and to currency pair.

Adding or Updating Currency Codes

Access the Currency Code page (Set Up CRM, Common Definitions, Currency, Currency Code, Currency Code).

Currency Code

Currency Code: AUD

Definition		Find View All	First	1 of 1	Last
*Effective Date:	01/01/1900	*Status:	Active		
*Description:	Australian Dollar				
Short Description:	Dollar				
Currency Symbol:	\$				
Country:	AUS Australia				
Decimal Positions:	2				
Scale Positions:					

Currency Code page

Currency Symbol

Enter a currency symbol. You can change the currency symbol that is delivered with the application or enter new symbols for currencies.

Scale Positions

Enter the number of numerals that you want to appear to the left of the decimal. The system rounds numbers accordingly for display, although it actually stores data with full precision in the database.

For example, suppose that you want all million dollar amounts to appear 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.

Setting Up the Currency Quotation Method




Access the Currency Quotation Method page (Set Up CRM, Common Definitions, Currency, Currency Quotation Method, Currency Quotation Method).

Currency Quotation Method

From Currency Code: AUD Australian Dollar

To Currency Code: ATS Schilling

Quote Method Find | View All First 1 of 1 Last


Effective Date: 01/01/1999  Status: Active  

Rate Quotation Basis

☒ Direct ☐ Indirect *Quote Units: 1 ☒ Auto Reciprocate

Triangulation Options

☒ Triangulate

Reference Currency: EUR 

euro

AUD x.xxxx = EUR 1 = ATS y.yyyy

Primary Visual Rate

☒ AUD → ATS

☐ AUD → EUR

☐ EUR → ATS

Cross-Rate

☒ Allow Override

Recalculate

☒ AUD → EUR

☐ EUR → ATS

Currency Quotation Method page

Rate Quotation Basis**Direct**

Select if you want direct quotes for currency pairs. For example, for a conversion of dollars to euros, a direct quote indicates that 1 USD = x.xxxx EUR.

Note. You must still classify currency pairs that triangulate as either direct or indirect for use in displaying the calculated cross rate.

Indirect

Select if you want indirect quotes for currency pairs. For example, for a conversion of dollars to euros, an indirect quote indicates that x.xxxx USD = 1 EUR.

Note. You must still classify currency pairs that triangulate 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, you might state the exchange rate between roubles and dollars as 1000 RUR = 31.4169 USD instead of 1 RUR = 0.031469 USD.

Auto Reciprocate Select 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 is updated automatically. You can only automatically reciprocate currency pairs for which quotation methods are established. The check box is selected by default.

Triangulation Options

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

Triangulate Select to convert two currencies through a third currency (the reference currency).

Reference Currency Enter the currency through which the from currency is converted. For example, when the system converts between Russian roubles and Brazilian reals, the reference currency might be the United States dollar.

Primary Visual Rate Select the primary rate. The primary rate appears on primary pages and reports.

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

Recalculate Select the method for recalculation.

Calculating Currency Exchange

This section discusses how to calculate currency exchange.

Page Used to Calculate Currency Exchange

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Currency Exchange Calculator	CURRENCY_EXCHNG_PN	Set Up CRM, Common Definitions, Currency, Currency Exchange, Currency Exchange Calculator	Calculate the currency exchange between currencies.

Calculating Currency Exchange

Access the Currency Exchange Calculator page (Set Up CRM, Common Definitions, Currency, Currency Exchange, Currency Exchange Calculator).

Currency Exchange Calculator

*From Amount:

1.00

*From Currency Code:

EUR

*To Currency Code:

USD

*Exchange Rate Type:

OFFIC

*Effective Date:

06/10/2009

Converted Amount:

1.15

Calculate

Currency Exchange Calculator page

Effective Date

Enter the date of the currency conversion. The system uses the rate that is effective on the date that you enter.

Chapter 8

Setting Up Credit Card Encryption

This chapter provides an overview of credit card encryption and discusses how to:

- Implement credit card encryption.
- Secure the credit card components.
- Change the credit card encryption key.
- Synchronize re-encrypted data with PeopleSoft Enterprise Financials.

Understanding Credit Card Encryption

PeopleTools Pluggable Cryptography is an advanced security framework that introduces a new security model for applications to encrypt and decrypt credit card data. This feature adds greater security to the credit card data handling system as well as upgrades existing credit card data.

Credit card encryption is available to PeopleSoft Enterprise CRM implementations that are integrated with PeopleSoft Enterprise Financials.

Strong Encryption

Pluggable Cryptography protects critical PeopleSoft data and enables more secure data communication with other businesses. It enables you to extend and improve cryptographic support for your data in PeopleTools. By incrementally acquiring stronger and more diverse algorithms for encrypting data, Pluggable Cryptography offers strong cryptography with the flexibility to change and grow.

Enhanced cryptography capability is provided by PeopleSoft pluggable encryption technology (PET), which employs 3DES algorithms and 168-bit encryption keys to secure data.

Features

Applying Pluggable Cryptography to your system:

- Improves the system's ability to protect credit card data during transfer and storage.
- Upgrades existing credit card data.
- Protects data during information display.

Once upgraded, the system displays credit card numbers so as to mask them. Before upgrade, the system displayed all digits of a credit card number, whether display-only or editable. The feature modifies the display to show only the last four digits, replacing each preceding digit with an X.

Standards

PeopleTools Pluggable Cryptography complies with the cardholder data protection requirements of the Payment Card Industry (PCI) Security Standards Council and with Visa's Cardholder Information Security Program (CISP). When you enable this feature, credit card numbers for external third-party payers, such as customers or students, are encrypted.

Note. This feature upgrades credit card numbers that are shared with the PeopleSoft Financials or a third-party database; it does not upgrade those stored internally in the CRM database, such as company-owned or employee credit cards.

See Also

Enterprise PeopleTools 8.50 PeopleBook: Security Administration, "Securing Data with Pluggable Cryptography"

Understanding Credit Card Verification Number Encryption

To enhance the security of credit card transactions, the CRM system supports the inclusion of verification number in the credit card authorization process. A verification number, also known as a card identification number, card authentication value, or card validation code depending on the card company, is a 3-digit or 4-digit code that is printed on the back or the face of the credit card. The number is associated uniquely to the card account number as well as the physical credit card. For transactional components that support credit card payments, a field is available to capture the verification number of the credit card. When a transaction, paid by credit card, is submitted, the specified credit card information and the verification number are sent to the authorization process.

In compliance with the guidelines recommended by the PCI Security Standards Council regarding sensitive authentication data, the verification number is removed permanently from the database once the authorization process completes (passed or failed). In situations where the card data is accepted but not immediately authorized (for example, future dated orders that are saved in the database and not submitted until the order date is reached), the verification number is stored in an encrypted format and is masked with XXX when displayed in the field until the value is deleted after authorization.

Here are a list of transactional components that support credit card payments and accepts verification number for authorization processing:

- Support Case.

Credit card transactions are not applicable to HelpDesk and HR HelpDesk cases.

- Order (agent-facing and customer-facing).
 - For canceled orders (which can be orders that are not yet submitted, or expired orders that are canceled by a batch process on a regular basis), their saved verification numbers are deleted from the database.
 - For future dated orders, their verification numbers are stored in the database, and will be removed when the fulfill by date is reached *AND* the orders are submitted.
 - For bulk orders, credit card information (including the verification number) is transferred to their child orders. Upon submission, the verification number is removed from the database and no longer appears on the parent and child orders.
- Agreement.
- Service order.
- Prepaid account.

Verification number is not supported in non-prepaid accounts.

Note. Because of its sensitive nature, verification number is not stored or displayed in the section of the Person component where credit card entries are stored, nor it is passed to another system (for example, supply chain system) through integration points.

Integration Technology

PeopleSoft Enterprise CRM uses the Integration Broker messaging technology (SOAP) to perform credit card authorizations with Cybersource (certified third-party vendor).

To facilitate message exchange between the PeopleSoft and Cybersource systems, an application engine program (CYB_SOAP_REQ) is used to transform authorization request and response messages to the appropriate format for the system that receives them.

The system delivers a node called *PSFT_CYB* in Integration Broker as part of the integration setup. This node contains the Cybersource-specific HTTP connector settings for contacting the authorization servers via SOAP as well as message transformation and routing settings.

Note. This SOAP-based integration uses core Integration Broker functionality that is available in all PeopleTools versions, which ensures backward and forward compatibility without reliance on third-party software support. Because it is a native PeopleTools functionality, it is easier for customers to set up, deploy and maintain.

This integration uses secure SSL (secure sockets layer) encryption.

Customers who use other non-Cybersource third-party vendors for credit card authorizations can also leverage this SOAP solution with few custom modifications. These changes include an updated node definition and routing properties for their vendors, and possibly a new transformation program (or an updated one based on the delivered transformation program) that formats messages circulating between PeopleSoft and their vendors. The underlying Enterprise Components message stubs and transaction triggers remain the same.

To avoid the potential issue of storing and displaying sensitive data in the Integration Broker logs and Service Operations Monitor, the log detail setting in the routing definition for the messages is set to *No Logging* as delivered.

General Settings for Credit Card Authorizations with Cybersource

A system-wide setting is available to make the provision of credit card verification number mandatory for authorization processing. When the setting is enabled, an error message appears if the user fails to enter a verification number when the credit card transaction is being submitted to authorization. In the case of an order, it is put on credit card hold if the verification number is not present.

For security verification purposes, the CRM system requires that the Cybersource user ID, merchant ID and merchant key be provided on the Installation Options page. These fields are included in the SOAP message for security verification during credit card authorization.

See [Chapter 3, "Setting Up General Options," Setting Up General Options, page 28.](#)

Cybersource SOAP Connectivity

Refer to the CRM installation guide for more information on how to set up the integration with Cybersource, which includes these high-level steps:

1. Set up the web server with SSL certificate provided by Cybersource and new proxy server setting.
2. Make sure to enter your Cybersource user ID, merchant ID and merchant key information on the Installation Options page.
3. Make sure the *PSFT_CYB* node is set up properly (connector and routing information in particular) and activated.
4. Test the connectivity using the Test Credit Card Interface component.

See *PeopleSoft Enterprise Customer Relationship Management 9.1 Supplemental Installation Guide*

See Also

PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook, "Managing Credit Card Payments," Submitting Credit Card Information for Authorization

PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook, "Managing Orders and Quotes," Managing Billing Information

PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook, "Working With Order Capture Self Service," Managing Shipping, Product, and Payment Options from the Checkout Page

PeopleSoft Enterprise Bill Presentment and Account Management 9.1 PeopleBook, "Managing Accounts and Viewing Bills in the Communications and Energy Industries," Managing Account Balance and Payments

Implementing Credit Card Encryption

You must perform these tasks to implement the new functionality:

1. Make sure that the PeopleSoft Financials database that you integrate with is set up to support credit card encryption.

2. Secure the credit card component.

See [Chapter 8, "Setting Up Credit Card Encryption," Securing the Credit Card Component, page 163.](#)

3. Upgrade existing credit card data.

See *PeopleSoft Enterprise Customer Relationship Management Upgrade*, "Complete Database Changes," Encrypting Credit Card Data

Contact Global Support before attempting to upgrade your data, if you have customized your system in any of the following ways:

- Added any records containing credit card number fields.
- Added a credit card number field to any records.
- Deleted any records found in the grid on the Upgrade Credit Card Numbers component.
- Deleted a credit card number field from any records found in the grid on the Upgrade Credit Card Numbers component.
- Customized the credit card encryption processing functionality in any way.
- Changed whether or how any particular credit card field is encrypted.

4. Change the credit card encryption key.

See [Chapter 8, "Setting Up Credit Card Encryption," Changing the Credit Card Encryption Key, page 166.](#)

Securing the Credit Card Component

You must specify the user roles that have access to credit card components.

Securing the components involves these general steps:

1. Add the Credit Card Component menu (CCENCRYPTION_MENU) to the appropriate permission list.

See [Chapter 8, "Setting Up Credit Card Encryption," Adding CCENCRYPTION_MENU to a Permission List, page 164.](#)

2. Provide security for the new credit card components:

See [Chapter 8, "Setting Up Credit Card Encryption," Providing Security for Credit Card Components, page 164.](#)

- FS_CC_UPGRADE
- FS_CC_CNVRT

3. Provide security to the new portal registries:

See [Chapter 8, "Setting Up Credit Card Encryption," Providing Security for the Portal Registries, page 165.](#)

- CREDIT_CARD_ENCRYPTION (Credit Card Encryption folder)
 - FS_CC_UPGRADE_GBL (Upgrade Credit Card Numbers content registry)
 - FS_CC_CNVRT_GBL (Change Encryption Key content registry)
4. (Optional) Change the security group for the FS_CC_CNVRT Application Engine process definition.
See [Chapter 8, "Setting Up Credit Card Encryption," Changing the Security Group \(Optional\), page 165.](#)
 5. Run the portal security synchronization process (PeopleTools, Portal, Portal Security Sync).
 6. Clear the application and web server caches.

Adding CCENCRYPTION_MENU to a Permission List

You must add CCENCRYPTION_MENU to the appropriate permission list. You may want to choose a security administration role.

See Also

PeopleSoft Enterprise PeopleTools 8.50 PeopleBook: Security Administration, "Setting Up Permission Lists," Managing Permission Lists

Providing Security for Credit Card Components

To provide access to the new PeopleSoft components:

1. Navigate to PeopleTools, Security, Permissions & Roles, Permission Lists, Pages.
2. Add the menu name CCENCRYPTION_MENU.
3. Click Edit Components.

The Components page appears.

4. Locate the FS_CC_UPGRADE component to which you want to grant access.

(By default, no components are authorized when adding a menu.)

5. Click the Edit Pages button for each component to which you want to grant access.

The Page Permissions page appears.

6. Specify the actions that a user can complete on the page.
7. Click OK on the Page Permissions page, and then again on the Component Permissions page.

Note. Perform this procedure twice, once for the FS_CC_UPGRADE component and again for the FS_CC_CNVRT component.

See Also

Enterprise PeopleTools 8.50 PeopleBook: Security Administration, "Setting Up Permission Lists"

Providing Security for the Portal Registries

You must provide security for the new folder and content registries on the portal.

For *Folder*:

1. Navigate to PeopleTools, Portal, Structure and Content.
2. In the Folders list, click on the links Set Up CRM, then Utilities.
3. Click the Edit link next to the Credit Card Encryption folder name.
4. Click the Folder Security tab.
5. On the Folder Administration page, select the permission lists that you want to have access to the Credit Card Encryption menu.

For *Content Registries*:

1. Navigate to PeopleTools, Portal, Structure and Content.
2. In the Folders list, click on the links Set Up CRM, then Utilities, then Credit Card Encryption.
3. Click the Edit link for Upgrade Credit Card Numbers (FS_CC_UPGRADE_GBL).
4. On the Security tab, make sure the permission list displayed corresponds to the CCENCRYPTION_MENU permission list.
5. Repeat steps 3 and 4 for Change Encryption Key (FS_CC_CNVRT_GBL).

Note. When you complete all security tasks, delete your browser cache so that you can view the new portal registries in the menu navigation.

See Also

Enterprise PeopleTools 8.50 PeopleBook: Portal Technology, "Administering Portals"

Changing the Security Group (Optional)

You can optionally change the security group for the FS_CC_CNVRT Application Engine process definition.

To change the security group:

- Navigate to PeopleTools, Process Scheduler, Processes.
- Select *Process Name* in the Search By field.
- Enter *FS_CC_CNVRT* in the begins with field.
- Click the Search button.
- On the Process Definition page, select the Process Definition Options tab.
- Modify the security group in the Process Groups grid.

Changing the Credit Card Encryption Key

This section describes how to:

- Re-encrypt credit card data.
- Change the encryption key.

You can change the credit card encryption key at any time.

Page Used to Change the Encryption Key

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Credit Card Number Re-Encrypt	FS_CC_CNVRT	Set Up CRM, Utilities, Credit Card Encryption, Change Encryption Key	Change the key used to encrypt credit card numbers. Run the utility to re-encrypt credit card numbers using a new encryption key.

Re-Encrypting Credit Card Data

To change the encryption key at any time after the initial conversion, you must first re-encrypt all credit card data.

To re-encrypt credit card data:

1. If this is the first re-encryption following the initial conversion and you have not secured the FS_CC_CNVRT component, complete the steps in the "Securing the Credit Card Components" section in this chapter.

See [Chapter 8, "Setting Up Credit Card Encryption," Securing the Credit Card Component, page 163](#).

Complete the steps for the FS_CC_CNVRT component only. Securing FS_CC_CNVRT secures both the FS_CC_CNVRT component and the FS_CC_CNVRT portal registry.

2. Navigate to Set Up CRM, Utilities, Credit Card Encryption, Change Encryption Key.

3. Click the *Generate Random Key* button to generate a new random hexadecimal encryption key.

Clicking this button generates a new, random hexadecimal encryption key. You can modify this key, but you must format it as a 24-byte string in hexadecimal notation. The first two characters must be *0x*, and the remainder must be exactly 48 characters and consist of both numeric digits and the lowercase letters *a* through *f*.

4. If the values in the Re-encrypt Action column are not *Decrypt, then Encrypt*, click the Crypt Action button until *Decrypt, then Encrypt* appears in the column.
5. Click the Run button to start the conversion process.

The Credit Card Conversion process converts each field in the grid. If the process fails for any reason, you can restart the process; it will resume where it stopped. If you can not restart the process, run it from the beginning. The system will bypass fields that have already been processed.

Changing the Encryption Key

Access the Credit Card Number Re-Encrypt page (Set Up CRM, Utilities, Credit Card Encryption, Change Encryption Key).

Credit Card Number Re-Encrypt

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

Process Status Pending

*Record (Table) Name	*Field Name	*Re-Encrypt Action
AUDIT_RBT_ACCT	CR_CARD_NBR	Decrypt, then Encrypt
RBT_ACCOUNT	CR_CARD_NBR	Decrypt, then Encrypt
RB_CARD_HISTORY	CR_CARD_NBR	Decrypt, then Encrypt
RB_CREDIT_CARD	CR_CARD_NBR	Decrypt, then Encrypt
RB_CR_CARD_HST	CR_CARD_NBR	Decrypt, then Encrypt
RB_CR_CARD_INFO	CR_CARD_NBR	Decrypt, then Encrypt
RB_PERSON_CARD	CR_CARD_NBR	Decrypt, then Encrypt
RC_CARD_INFO	CR_CARD_NBR	Decrypt, then Encrypt
RO_CR_CARD	CR_CARD_NBR	Decrypt, then Encrypt
RO_CR_CARD_HST	CR_CARD_NBR	Decrypt, then Encrypt
RO_PP_ACCT	CR_CARD_NBR	Decrypt, then Encrypt
RO_PP_ACCT_HST	CR_CARD_NBR	Decrypt, then Encrypt

Credit Card Number Re-Encrypt page

Crypt Action

Toggle the value in the Re-Encrypt Action column in the grid.

Generate Random Key

Generate a random key in the format needed by the encryption algorithms used for credit card encryption and decryption profiles.

(Encryption key)

If you want to modify the generated key or enter your own, you must format it as a 24-byte hex string. The first two characters must be *0x* and the remainder must be exactly 48 characters that consist of both numeric digits and the lowercase letters *a* through *f*.

Record (Table) Name

Displays the record name.

Field Name

Displays the field name.

Re-Encrypt Action

Values include:

- *Decrypt, then Encrypt:* Re-encrypt data currently encrypted with the Pluggable Cryptography credit card encryption profile.
- *No Action:* Indicates that the utility has converted the record. If an error occurs and you rerun the process, records for which No Action is displayed are not reprocessed.

Synchronizing Re-Encrypted Data With PeopleSoft Enterprise Financials

Any change in CRM data requires that it be propagated to the PeopleSoft Financials database, which is described in the PeopleSoft PeopleBooks for your software release. Recommended references follow.

See Also

PeopleSoft Enterprise Components for CRM 9.1 PeopleBook, "Activating Messaging EIPs"

PeopleSoft Enterprise Components for CRM 9.1 PeopleBook, "Performing a Full Data Publish of Current Effective Data"

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Managing Enterprise Integration for PeopleSoft Enterprise CRM," Data Integrations

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Integrating with PeopleSoft Applications," Integrating with PeopleSoft Financial Management Services

Chapter 9

Implementing Alternate Character

This chapter provides an overview of alternate character and discusses how to configure the system for alternate character usage.

Understanding Alternate Character

This section discusses:

- Alternate character functionality.
- Alternate character display.
- Alternate character searches.

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Company Business Objects"

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Person Business Objects"

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Person Business Objects"

Alternate Character Functionality

PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) provides alternate character functionality that supports the need in Japanese and Cantonese (Hong Kong) markets to represent proper nouns phonetically and in their native formats. This functionality enables PeopleSoft Enterprise CRM to validate double-byte characters in alternate character fields.

To implement alternate character functionality, you must have installed a Japanese- or Cantonese-enabled database and a double-byte-enabled operating system. The alternate character architecture and the related language table architecture enable users to enter data using both single-byte and double-byte character sets and to switch between a base language table and a related language table to view information in either single-byte or double-byte characters.

For example, users who enter data in Japanese require functionality that enables them to enter proper nouns, such as names or addresses, both in kanji and by using a phonetic double-byte character set, such as hiragana. The alternate character architecture also supports phonetic sorting rather than binary sorting on proper nouns for languages that require the use of two-character sets to enter proper nouns.

Alternate Character Fields

In an alternate character-enabled system, alternate character fields appear in company and person names and addresses.

Labels for alternate character fields differ depending on the component and the field. For example, the Alt Char Name appears in the Company component for entry of the company name in alternate character format. The rules that the system used to determine if alternate character fields appear on pages vary depending on the type of alternate character information that you enter:

- Company name.

In an alternate character-enabled system, the alternate character field for a company name always appears, whether or not it has a value. This does not depend on the country setting for the company.

- Person name.

The alternate character field appears on a page only if the country format is Japan or Hong Kong. You cannot view the alternate character field if one of these countries is not selected.

Pages that display personal name fields usually display them in first name, last name order. For Japanese and most Southeast Asian languages, however, personal name fields appear in the last name, first name order. A space, not a comma, separates the last and first names—the Name field displays the last name[space]first name, not last name,first name.

- Address (for both companies and persons).

The alternate character fields appear on the Update Address, the Address Book Entry Details and the Quick Create pages. They do not appear on the Address Book list page or on the summary address information that appears on the primary page for a business object.

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Defining Name and Address Information for Business Objects."

Note. The alternate character display is determined by the country code that is specified for the business object, not by the country code that is defined as a user preference for the user.

Alternate Character Searches

After you establish alternate character information, you can use the alternate character fields as search criteria in the Business Object search component or the Configurable search.

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Working with Predefined Business Object Search and Quick Create Data."

Configuring the System for Alternate Character Usage

This section discusses how to:

- Set up alternate characters for language codes.
- Enable alternate character functionality for a user.
- Enable business object search to recognize alternate character fields.

Pages Used to Configure the System for Alternate Character Usage

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Installation Options - Alt Character	ALT_CHAR_PNL	Set Up CRM, Install, Installation Options, Alt Character	Set up the alternate characters that the system uses for a specific language code.
User Preferences - Overall Preferences	OPR_DEF_TABLE_RB1	Set Up CRM, User Preferences, Overall Preferences	Enable alternate character functionality for a user. See Chapter 9, "Implementing Alternate Character," page 171.
Field	RBQ_FLDDFN	Set Up CRM, Common Definitions, Customers, BO Search, Field, Field	Enable business object searches and quick creates to use alternate characters for a specific field.

Setting Up Alternate Characters for Language Codes

Access the Installation Options - Alt Character (alternate character) page (Set Up CRM, Install, Installation Options, Alt Character).

Installation Options - Alt Character page

Language Code	Select a language code to which you can assign an alternate character value.
Alternate Character	Select the character set for the language code. Values are: <i>Alphanumeric</i> , <i>Alphanumeric with Latin-1 Ext</i> , <i>Any</i> , <i>DB Any Characters (Kanji)</i> , <i>Double Byte Hiragana</i> , <i>Double-Byte Katakana</i> , and <i>Single Byte Katakana</i> . The system uses the character set that is assigned to a user's language code to display alternate character-enabled fields to the user.

Enabling Alternate Character Functionality for a User

Access the User Preferences - Overall Preferences page (Set Up CRM, User Preferences, Overall Preferences).

See [Chapter 9, "Implementing Alternate Character," page 171](#) and [Chapter 4, "Setting Up Security and User Preferences," Defining Overall Preferences, page 89](#).

Enabling Business Object Search to Recognize Alternate Character Fields

Access the Field page (Set Up CRM, Common Definitions, Customers, BO Search, Field, Field).

Select the Is Alternate Character Field field.

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Setting Up Business Object Search and Quick Create," Adding and Modifying BO Search and Quick Create Definitions.

Chapter 10

Setting Up Auditing for Cases and Inbound Email

This chapter provides an overview of audit information and discusses how to set up case auditing.

Important! PeopleSoft delivers the system with auditing features disabled. Because enabling auditing can negatively impact application performance, you should analyze audit needs carefully and enable auditing only when there is a strong business reason to do so.

Understanding Audit Information

This section discusses:

- History versus auditing.
- The audit record.

History Versus Auditing

PeopleSoft Enterprise CRM tracks events that occur in cases and emails using a feature called the Active Analytics Framework. You can view a summary of these tracked events on component history pages. For each tracked event, a corresponding audit trail record stores details of changes and is used to display details of the changes.

Use the following pages to review history information in the Case component and in the Inbound Email component:

- Case History page

The Case History page lists information about major events in the life of the case, including a description of the event and details of field changes that are associated with the event. You can define case history events using complex conditional statements. For example, you can configure the case history so that changes to a field only appear if the field changes to or from a particular value.

You set up case history processing using the active analytic framework.

- Email History page

The Email History page lists email history events that are captured by the active analytic framework. You can use this page to review email event history, routing history, and audit trail information.

Both history pages offer access to a detailed audit trail page that displays record-level changes. You can specify the fields in the record to audit and the types of changes to capture (add, update, display, or delete). You cannot incorporate logic based on the value of the fields; the system captures changes without regard to the data that changes.

See Also

PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook, "Processing Cases," Reviewing Case History

PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook, "Setting Up ERMS System"

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide

The Audit Record

The audit record stores audit trail data. The structure of this record determines the fields that get audited. The audit record for the Case component, RC_CASE_AUDIT, stores information from both support cases and help desk cases. The RB_INEM_AUDIT record stores information for the Search Inbound Emails component (the email workspace).

The audit record consists of these elements:

1. Audit record key fields.

These fields hold information that is specific to the audit action.

2. The key fields for the records to audit.

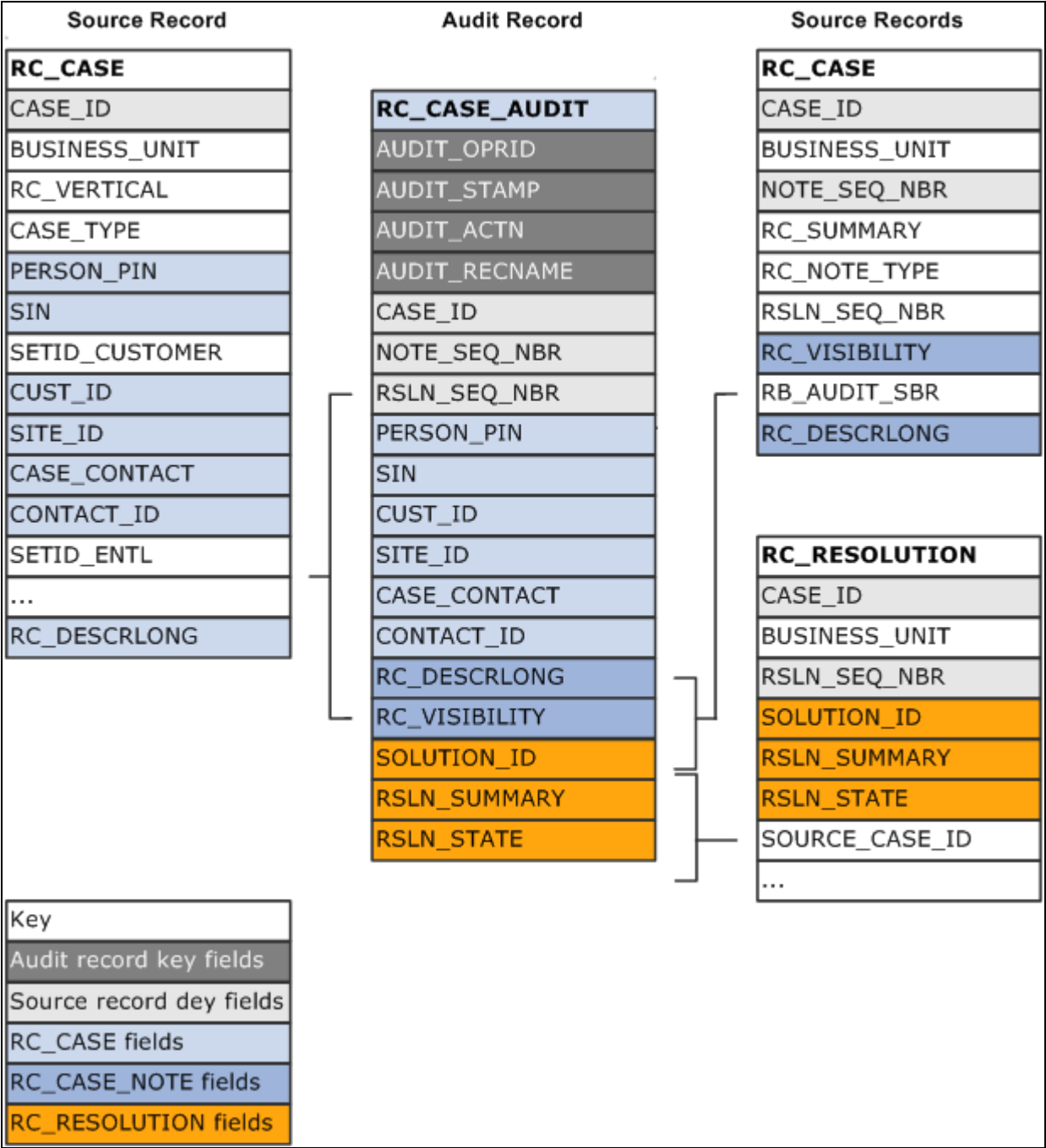
These are alternate key fields in the audit record.

Cases are based on several records; the audit record includes the key fields for every record that is audited. The BUSINESS_UNIT key field, however, is not on the audit record even though BUSINESS_UNIT is a key to the main case record, RC_CASE, and to each of its child records. This is because case numbers are unique across all business units, and the value in the CASE_ID field is enough to uniquely identify the case.

3. The fields to audit.

If a field appears in more than one record, changes to both records are audited. For example, the RC_DECSRLONG field appears in both RC_CASE and RC_CASE_NOTE. By including this field in the audit record, you ensure that changes to both the case description and the note description are audited.

This is the audit record architecture for RC_CASE_AUDIT:



Partial case audit record

The left and right columns list the records that are audited, or *source records*. The middle column lists the audit record.

Note. This diagram is an example only. Use PeopleSoft Application Designer to review the actual record structures for cases.

Before you turn on auditing, review the record structure so that you know which fields get audited.

To change the fields that get audited, use PeopleSoft Application Designer to modify the RC_CASE_AUDIT record definition or the RB_INEM_AUDIT record definition.

Important! PeopleSoft does not support modifications to the audit record definitions.

Setting Up Case and Email Auditing

To choose actions to audit, use the Audit - Setup (RC_COMP_AUDIT) component.

This section discusses how to set up case auditing.

Page Used to Set Up Case Auditing

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Audit - Setup	RC_COMP_AUDIT	Set Up CRM, Common Definitions, Audit Trail - Setup, Audit - Setup	Choose which actions (add, change, and delete) to audit.

Choosing Actions to Audit

Access the Audit - Setup page (Set Up CRM, Common Definitions, Audit Trail - Setup, Audit - Setup).

Audit - Setup

*Component Name *Audit Record Name

Description

Record - Audit Options					
Record (Table) Name	Add	Change	Delete		
<input type="text" value="RC_ASSOC_TABLE"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="RC_CASE"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="RC_CASE_ATTACH"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="RC_CASE_COMPLNT"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="RC_CASE_DISPUTE"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="RC_CASE_NOTE"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="RC_INTEREST_PRT"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="RC_RESOLUTION"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

☐ Show Field Label

Audit - Setup page

Component Name

Enter the object name of the component. PeopleSoft delivers entries for RC_CASE (the Case component) and RB_EM_IB (Search Inbound Emails component).

Although you configure auditing at the component level, the processing occurs at the record level. Therefore, when multiple components are based on the same record, the system captures data changes regardless of which component the user was in when making the change. For example, the auditing that you establish for the RC_CASE component is also valid for the self-service case components, which are based on the same records.

Audit Record Name

Enter the record where the system stores information about data changes. The structure of this record determines which fields get audited.

Record - Audit Options

The fields in the Record - Audit Options region enable you to select which actions (add, change, and delete) to capture for each record that you audit. The selections apply to all audited fields in the specified record. You cannot set any field-level auditing options; all fields in a record must use the same auditing rules. To set field-level auditing options, you must redefine the audit record using PeopleSoft Application Designer.

When you activate auditing on the Audit Setup page, you turn on auditing only for the fields that are included in the audit record (RC_CASE_AUDIT or RB_INEM_AUDIT—the record that stores the audit trail data).

All auditing is based on differences between the field values at the time that the component is opened and at the time that the component is saved. If a user saves several times while working in a component, each save triggers auditing activity.

Record (Table) Name Enter the record that is associated with the audited component. For example, the Case component includes data from several records.

Add Select to have the system capture the change every time a value is added to a field that is audited. A value is considered as added in two situations:

- When data is in the field the first time that you save a new row of data.

For example, if you create a new case, the values in all populated fields are considered as added the first that time that you save that case.

- When you save data in a field that was previously null.

Change Select to have the system capture the change every time the value of an audited field is updated. A value is considered updated when a new non-null value is different from the previous non-null value.

Delete Select to have the system capture the change every time the value of an audited field is deleted. A value is considered deleted when a null value replaces a non-null value.

Show Field Label Select to have the runtime audit page display the field labels rather than the field's object name. For example, if you're auditing the RC_PRIORITY field, selecting this option causes the audit page to refer to this field as *Priority* rather than *RC_PRIORITY*.

If this check box is clear, the audit page displays field values. If the audited field has translate values, the translate long value appears.

Chapter 11

Running Diagnostic Reports

This chapter provides an overview of PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) diagnostics and discusses how to:

- Register diagnostic packages.
- Run diagnostic reports.

Understanding PeopleSoft Enterprise CRM Diagnostics

CRM diagnostics consist of seven PeopleSoft application packages, or plug-ins, that can help to troubleshoot the PeopleSoft Enterprise CRM system setup or integration related problems. When you report a problem to the PeopleSoft Global Services Center, the support representative might ask you to run a diagnostic package to determine how the system is set up.

The delivered diagnostic packages are sufficient to diagnose most system problems. To develop additional diagnostic packages that meet installation-specific needs, use the PeopleTools Application Designer.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide*

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Lifecycle Management Guide*

PeopleSoft Enterprise CRM diagnostic packages produce reports that appear at the workstation or are emailed to you. You can run the following seven diagnostic packages:

Package Name	Purpose
DIAG_CMSETUP	<p>Displays information about correspondence management installation and setup:</p> <ul style="list-style-type: none">• Merge Server Definition.• Merge Server Printers.• Setup Merge Server.• Install Options.• FTP URL Details for Correspondence Management.• Process Scheduler Server Names for Correspondence Management Jobs.• Process Scheduler Server Details.

Package Name	Purpose
DIAG_COMMSETUP	<p>Displays information about communications setup:</p> <ul style="list-style-type: none"> • Configuration table. • Churn event setup. • Churn event set setup. • Churn score setup.
DIAG_EIPGATEWAYINFO	<p>Queries the connection URL and displays information about multiple gateways, if multiple gateways are set up.</p>
DIAG_EIPMESSAGENODES	<p>Displays information about node definition:</p> <ul style="list-style-type: none"> • Message node name. • Transaction type (InSync, OutSync, InAsync, and OutAsync). • Request message. • Request message version. • Status (active, inactive).
DIAG_EIPMESSAGES	<p>Displays information about EIP messages that is sorted by the different application names:</p> <ul style="list-style-type: none"> • Message node name. • Transaction type (InSync, OutSync, InAsync, and OutAsync). • Request message. • Request message version. • Message handler. • Message handler type. • Status (active, inactive).
DIAG_FSISSETUP	<p>Displays the following:</p> <ul style="list-style-type: none"> • Operator, business unit, and setID. • Role code and role name. • Role mapping. • FSI issues setup.

Package Name	Purpose
DIAG_SEARCHBUILDSETUP	<p>Displays the following:</p> <ul style="list-style-type: none"> • Information about the last search build. • Run control information. • Search parameters for CRM_RB_SRCHDB. • Search records. • Search records and fields.
DIAG_DATASETRULES	<p>Displays information about Data Set Rules:</p> <ul style="list-style-type: none"> • Data Set Rules Name. • Status Active. • Search Record. • Rule Condition. • SQL.
DDIAG_PRODCATALOG	<p>Displays information about Product Catalog through input prompt of SETID:</p> <ul style="list-style-type: none"> • List of Products. • Catalog Details. • Product Association. • Product Criteria. • Security Membership. • Featured Products.
DIAG_RULEROLE_SETUP	<p>Displays information about Role and Rules Setup through input prompt of Operator ID:</p> <ul style="list-style-type: none"> • Role. • Role and Rules.
DIAG_SALESTERRITORY	<p>Displays information about Sales Territory Info through input prompt of user id:</p> <ul style="list-style-type: none"> • TREE MANAGER. • TREE MANAGER NODES. • TREE Details. • Territory Details.

<i>Package Name</i>	<i>Purpose</i>
DIAG_SALESUSER	Displays information about Sales User details through input prompt of user ID: <ul style="list-style-type: none"> • SALES USER DETAILS. • SALES USER VISIBILITY DETAILS. • SALES ACCESS PROFILE DETAILS.

Note. Before you can run any of these diagnostic packages, you must register them.

See Chapter 11, "Running Diagnostic Reports," Registering Diagnostic Packages, page 184.

Registering PeopleSoft Enterprise CRM Diagnostics

This section discusses how to run PeopleSoft Enterprise CRM diagnostics.

Page Used to Register PeopleSoft Enterprise CRM Diagnostics

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Register Diagnostics	PT_DIAG_FRAME_REG	Application Diagnostics, Register Diagnostics, Register Diagnostics	Register diagnostic packages to run in the PeopleSoft Enterprise CRM system.

Registering Diagnostic Packages

Access the Register Diagnostics page (Application Diagnostics, Register Diagnostics, Register Diagnostics).

Register Diagnostics page



Click the Look Up Plug In Name button and search for a package name that begins with DIAG.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Using Application Classes"

Running PeopleSoft Enterprise CRM Diagnostic Packages

This section describes how to run PeopleSoft Enterprise CRM diagnostic packages.

Pages Used to Run PeopleSoft Enterprise CRM Diagnostic Packages

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Launch Diagnostics	PT_DIAG_PLUGIN	Application Diagnostics, Launch Diagnostics, Launch Diagnostics	Select and run diagnostic packages.
PeopleSoft Diagnostics	PT_DIAG_PLUGIN	Select one or more listed plug-ins on the Launch Diagnostics page. Select the Display report in browser option and click the Generate Diagnostics button.	View the diagnostics for the selected plug-ins.

Selecting and Running Diagnostic Packages

Access the Launch Diagnostics page (Application Diagnostics, Launch Diagnostics, Launch Diagnostics).

Launch Diagnostics

Registered Plug-ins Customize | Find | First 1 of 1 Last

Select	Plug-in Name	Description
<input checked="" type="checkbox"/>	DIAG_CMSETUP	Correspondence Management

[Select All](#) [Clear All](#)

☐ Email report ☒ Display report in browser

[Generate Diagnostics](#)

Launch Diagnostics page

Select one or more diagnostic packages to run and click the Generate Diagnostics button.

Email report	Select to have the report emailed to you
Display report in browser	Select to have the report appear in a separate popup window.

Viewing Diagnostics

Access the PeopleSoft Diagnostics page (Select one or more listed plug-ins on the Launch Diagnostics page. Select the Display report in browser option and click the Generate Diagnostics button).

PeopleSoft Diagnostics

Database Name: **CR910QA1**
User ID: **VP1**
Date Created: **2009-06-11-07.06.06.000000**
Database Type: **ORACLE**

Plug-in Name: **DIAG_CMSETUP**
Description: **Correspondence Management**

Purpose: **Correspondence Management Diagnostics**

The following values were retrieved:
****Merger Server Printer**** ****PS_RBC_PRINTER_LST****
****Install Options for CM**** ****PS_RBC_CM_SYSDEFN****
RB_PDF_OPTIONS 3
RB_URL_ID1 RB_CORRMGT
RB_URL_ID2 RB_CORRMGT
RB_URL_ID3 RB_CORRMGT
RB_URL_ID4 RB_CORRMGT
RB_URL_ID5 RB_CORRMGT
EMAIL_ADDR_SENDER support@rt.peoplesoft.com
****FTP URL Detail**** ****PS_RBC_CM_SYSDEFN****
URL_ID RB_CORRMGT
URL ftp://anonymous:anonymous@adas0136.peoplesoft.com/crm/
****Process Scheduler Server for CM Jobs**** ****PS_PRCJOBDEFN****

PeopleSoft Diagnostics page 1 of 2

```
PRCSJOBNAME DELVUNIX  
SERVERNAME <blank>  
PRCSJOBNAME DELV_NT  
SERVERNAME MERGE_NT  
PRCSJOBNAME EXTRDATA  
SERVERNAME <blank>  
PRCSJOBNAME MERGEDOC  
SERVERNAME MERGE_NT  
****Process Scheduler Server Details**** ****PS_PMN_SRVRLIST****  
SERVERNAME PSNT  
DESCR2 NT/Win2000  
SERVERSTATUS 3  
SRVRHOSTNAME ADAS0181  
LASTUPDDTTM 2009-06-11-07.05.15.824427
```

OK

PeopleSoft Diagnostics page 2 of 2

Part 3

Workforce Management

Chapter 12

Setting Up and Maintaining Provider Groups and Group Members

Chapter 13

Managing Workforce Competencies

Chapter 14

Setting Up and Performing Assignment Searches

Chapter 15

Defining Holiday Schedules

Chapter 16

Using Calendars

Chapter 12

Setting Up and Maintaining Provider Groups and Group Members

This chapter provides an overview of provider groups and group members and discusses how to:

- Establish cost categories for workers.
- Define provider groups.
- Define schedules for provider groups.
- View team calendars.
- Define group assignment criteria and competencies.

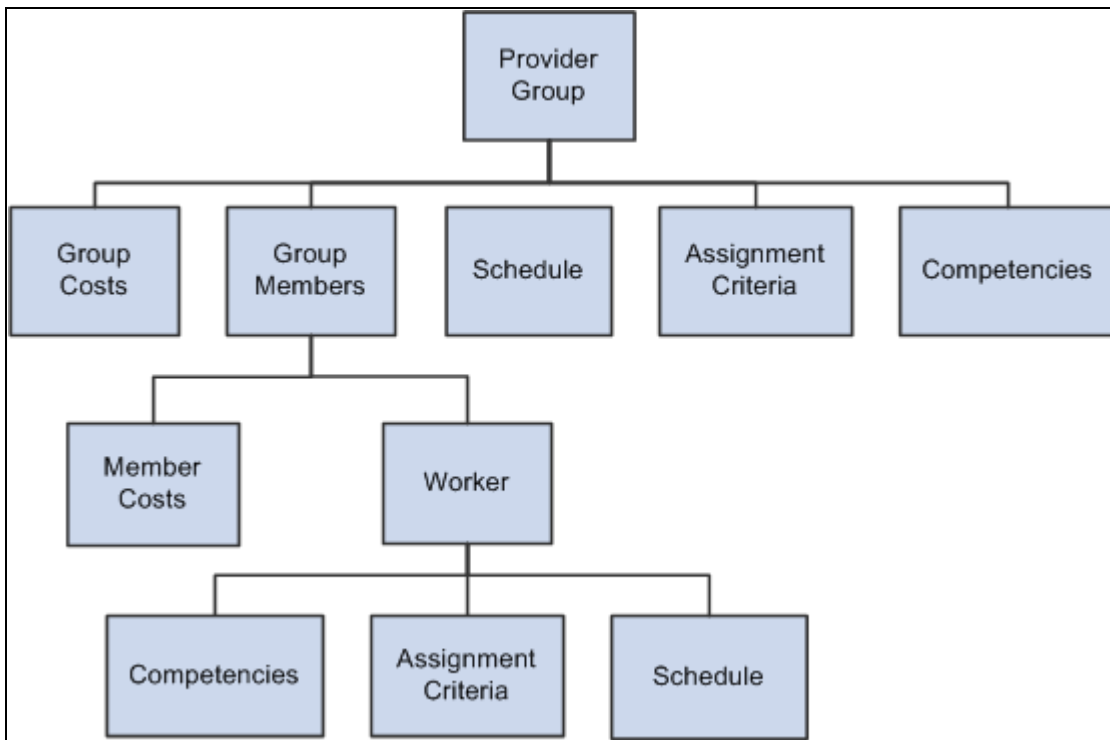
Understanding Provider Groups and Group Members

Provider groups organize groups of workers that provide the services or support that are offered by an organization. Cases and service orders are assigned first to a provider group and then to a member of a provider group. For cases, you can assign cases directly to provider group members (agents) rather than going through a provider group assignment.

You can create provider groups that represent workers who service or support specific geographic regions, specific products, or specific customers. Provider groups might also represent workers who have specific competencies. Each worker that can be assigned to a service order must belong to at least one active provider group.

Provider Group Data Model

The following diagram illustrates that a provider group definition includes group cost information, group members, an operating schedule, assignment criteria, and competency information:



Provider group data model

Each group member can represent employees or third-party contractors. You can also define cost information for each worker in the group. Workers are defined using the Worker component.

Default 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 service. The defaults for an agreement take precedence over the defaults for a service. For on-demand service orders, the default provider group and group member information come from the service definition.

System-Suggested Assignments for Cases and Service Orders

For both provider groups and workers, you can define competencies and assignment criteria for provider group and group member assignment searches that are performed on a case or service order. The system uses the competency and assignment criteria to evaluate the best candidate for assignment to the case or service order.

To further inform assignment decisions, the system displays current availability status of each provider group or group member on the candidate list. To determine availability for a provider group, the system uses the schedule information—the hours of operations and holidays—that you define for the provider group.

For group members, the system determines availability by using schedule information that is defined on the worker's resource calendar, if it's available, or standard workweek information that is defined for the installation. In addition to availability status, the system also displays the current number of open cases that are assigned to each worker in the list when the assignment search is performed for a case.

Automatic Assignments for Cases

PeopleSoft Customer Relationship Management (PeopleSoft CRM) performs automatic assignment for regular and self-service cases based on the configuration rules that are set up at the call center business unit level. For each type of case (regular and self-service), you can configure separate assignment options for provider groups and group members (agents).

Regardless of the configuration, an existing provider group or group member assignment is never overwritten. For example, if you select a provider group for the case through the system-suggested assignment, the system does not attempt to assign a provider group when you save.

See *PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook*, "Defining Call Center Business Units and Display Template Options."

Automatic Assignments for Service Orders

Similar to cases, you can enable PeopleSoft CRM to assign service orders automatically at save time by activating the automatic assignment feature at the field service business unit level.

The automatic assignment feature, however, does not overwrite any provider group or group member values that are present on service orders as a result of manual, default, or system-suggested assignment.

If the Candidate must be available check box is selected at the business unit level, the assignment engine only considers provider groups and group members that are available (during the time the service is performed) for the automatic assignment. No automatic assignment will be made if this check box is selected and there is no provider group or technician available.

See *PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook*, "Creating and Managing Service Orders," Setting Up Automatic Service Order Assignments.

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Workers"

Chapter 14, "Setting Up and Performing Assignment Searches," page 217

Chapter 25, "Setting Up and Managing Agreements and Warranties," page 453

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Setting Up Services"

PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook, "Defining Call Center Business Units and Display Template Options"

Establishing Cost Categories for Workers

This section discusses how to define cost categories for workers.

Page Used to Define Cost Categories

Page Name	Definition Name	Navigation	Usage
Cost Categories	RF_COST_CAT	Set Up CRM, Common Definitions, Employee Data, Cost Categories, Cost Categories	Define cost categories to account for the cost of labor time to your company.

Defining Cost Categories

To define cost categories, use the Cost Categories (RF_COST_CAT_GBL) component.

Access the Cost Categories page (Set Up CRM, Common Definitions, Employee Data, Cost Categories, Cost Categories).

Cost Categories

SetID CRM01

Cost Categories					
*Cost Category Code	*Description	Short Description			
AFTR	After Hours	After Hour	VAT Defaults	Service VAT Treatment Defaults	
DOUB	Double Time	Double	VAT Defaults	Service VAT Treatment Defaults	
HALF	Time and Half	1.5	VAT Defaults	Service VAT Treatment Defaults	
PAGER	Pager	Pager	VAT Defaults	Service VAT Treatment Defaults	
STRT	Straight Time	Straight	VAT Defaults	Service VAT Treatment Defaults	
TRAVL	Travel	Travel	VAT Defaults	Service VAT Treatment Defaults	

Add Cost Category

Cost Categories page

Once you define cost categories, establish an hourly cost rate for each category that provider groups use on the Provider Groups page. Specify cost categories and rates for group members on the Provider Group Member page.

Cost Category Code Enter cost categories to account for the labor costs that the organization incurs; that is, the cost to provide a worker to perform a service for your customers.

VAT Defaults (value-added tax defaults)	<p>Click to go to the VAT Defaults Setup page in the PeopleSoft Financials/SCM (FSCM) database.</p> <p>Use the page to specify a value for all the required fields, for any fields that require an overall default at the top of the VAT default hierarchy, or for any fields that require an exception to the value specified for a VAT driver higher up in the VAT default hierarchy. You can insert rows for any or all of the VAT driver keys, as well as the VAT country or state. You can also delete existing rows</p>
Service VAT Treatment Defaults	<p>Click to access the Service VAT Treatment Defaults Setup page in the PeopleSoft Financials/SCM (FSCM) database. Use this page to enter VAT defaulting information for service VAT treatment.</p>

Note. VAT is an acronym for value-added tax. Under many different names, VAT is in use in over 130 countries around the world. VAT is a governmental sales tax, a straight percentage that is added to the cost of a good or service. VAT can be inclusive (included in the price of a good or service), or exclusive (added to the price of a good or service).

The VAT-related links on this page appear if the Field Service option to send billing information to Contracts has been selected as part of the installation options.

See Also

PeopleSoft Global Options and Reports PeopleBook, "Working with Value Added Taxes (VAT)"

Defining Provider Groups

To define provider groups, use the Provider Group (PF_PROVIDER_GRP) and Provider Group Member (RF_GRP_MEMBER) components. To load data into these tables for these components, you can also use the RF_PROVIDER_GRP_SCI and RF_GRP_MEMBER_CI component interfaces.

This section lists prerequisites and common elements, and discusses how to:

- Define provider groups.
- Define provider group members.

Prerequisites

Before you define provider groups, you must:

- Define workers by using the Worker component.
- (Optional) Define cost categories.

See Also

Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," Establishing Cost Categories for Workers, page 193

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Workers"

Common Elements Used in This Section

Hourly Rate and Currency Code	Enter the cost to your company for one hour of labor time that is charged to this cost category, and the currency that you use for the cost.
Multiplier	Enter a numeric value to generate an hourly billing rate that is based on the hourly rate.
Billable Rate	Displays the value that is calculated at save time or the next server trip that reflects the hourly billing rate, which is based on the following formula: (Billable Rate) = (Hourly Rate) * (Multiplier)

Pages Used to Define Provider Groups

Page Name	Definition Name	Navigation	Usage
Provider Groups	RF_PROVIDER_GRP	Workforce, Provider Groups, Provider Groups	Define and maintain the groups of people who perform service or support activities.
Provider Group Member	RF_GRP_MEMBER	<ul style="list-style-type: none"> Workforce, Provider Group Members, Provider Group Member Click the Details button on the Provider Groups page. 	Define the people who are associated with a provider group.

Defining Provider Groups

Access the Provider Groups page (Workforce, Provider Groups, Provider Groups).

Provider GroupsScheduleAssign Group CriteriaGroup Competencies

SetID CRM01Provider Group ID APLE

Basic Information

*Provider GroupAppliances Eastern

*StatusActive

Type

Internal

Partner/TPM

Both

Company Name

*Notifications

Use Members to Broadcast

Group Worklist

Group Worklist Name

Appliances_Eastern

Preferred Notification

Both

Email Address

crmqa@yahoo.com

Comments

Pine,Teresa P, Orellana,Mason D and Perry David, L belong to the Appliances_Eastern Group Worklist

Currency Code

Provider Groups page (1 of 2)

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Group Cost Categories				
*Cost Category	*Hourly Rate	*Currency Code	*Multiplier	Billable Rate
Straight Time	75.00	USD	1.00	75.00

Add Cost Category

Group Members	
Name	*Status
Alan Bailey	Active
Amed Carver	Active
Ben Harris	Active
Kendall Symth	Active
Melinda Rose	Active
Rider Bookie	Active
Shanna Ethbridge	Active
Shirley Gardner	Active
Teresa Pine	Active
Tyson Bruno	Active

Add Group Member

Audit History

Provider Groups page (2 of 2)

Basic Information

Status

Select the current status of the provider group: *Active* or *Inactive*.

The system excludes all inactive provider groups from system prompt lists; therefore, you can't assign them to service orders and cases. Also, you can't change the status of a provider group to *Inactive* if any of its group members is currently assigned to an open service order or case.

Note. When you change the status of a provider group to *Inactive*, the status of all its members changes to inactive automatically and can't be modified unless you set the provider group status to *Active* again. To activate group members, you must manually change the status of each group member to *Active*.

If you change the status of a group member to *Inactive* by using the Worker component, the group member automatically becomes inactive in the associated provider group.

Type

For informational purposes, the Type defines whether members of the provider group are internal employees, partner or third-party maintainer (TPM) employees, or both.

Company Name	Select the company that is associated with the provider group. When a provider group represents staff from a third-party contractor, use this field to define a name for the third-party company. Click the Transfer to Company button to access the Company component and define an additional company.
Notifications	The system uses the notification routing preferences that are 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 under PeopleTools, Security.
Use Members to Broadcast	Select to send all automated notifications (that are sent to the group) to each member's individual worklist instead of to the group worklist. The system never broadcasts manual notifications, regardless of whether this check box is selected.
Group Worklist and Group Worklist Name	Select the check box and the name of the group worklist that is associated with the provider group. Worklists are established on the Group Worklist page. As group membership changes, update permissions for the group worklist as necessary.
Preferred Notification	Select the preferred way of receiving notification: <i>Email, Worklist, or Both</i> .
Email Address	Enter the email address that is used to send notifications to the provider group.
Currency Code	Select the currency that is used to determine labor costs for the work that provider group members perform. The selected currency becomes the default for new rows in the Group Cost Categories grid. Currency codes are established on the Currency Code page.

Group Cost Categories

The Group Cost Categories grid reflects the costs per hour and corresponding billable rates for the members of the provider group.

Cost Category	Select the code of the cost category that is used to account for the labor time of members in the provider group. Cost category codes are defined on the Cost Categories page.
Hourly Rate, Currency Code, Multiplier, and Billable rate	Use these field to establish the rate, currency, and multiplier by which you want to bill a customer for the selected cost category for the group of members. When you save the page, the system multiplies the hourly rate by the value in the Multiplier field to calculate the billable rate.

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Defining Workers," Setting Up Cost Categories.

Group Members



Click the Details button to access the Provider Group Member page, where you can view or modify the group member record.

Name

Displays the name (first name followed by last name) of the group member. Before you can add a new person to the group, the person must be defined using the pages in the Worker component. Click the Transfer to Worker button that is next to this field to access the Worker component.

Note. You can also define members of the provider group on the Provider Group Member page.

Status

Select the person's current status as a member of this provider group: *Active* or *Inactive*.

The system excludes all inactive group members from system prompt lists, so you can't assign them to service orders and cases. You cannot change the status of a group member to *Inactive* if an open service order is assigned to the group member. Similarly, you cannot delete a group member if an open service order is assigned to him or her.

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Workers"

Chapter 5, "Working with Notes and Attachments," page 135

Defining Provider Group Members

Access the Provider Group Member page (Workforce, Provider Group Members, Provider Group Member).

Provider Group Member			
Provider Group			
SetID	CRM01		
Provider Group	APLE	Appliances Eastern	Status Active
Member Information			
Name	Kendall Symth		
Person ID	592		
*Status	Active	Location	KUNY00 Corporation Headquarters
Currency Code	USD	Description	US Dollar
Comments			

Provider Group Member page (1 of 2)

Member Cost Categories					Customize	Find	View All	First	1 of 1	Last
*Cost Category	*Hourly Rate	*Currency Code	*Multiplier	Billable Rate						
Straight Time	50	USD	1.25							
Add Cost Category										

Assigned Service Orders												Customize	Find	First	1-2 of 2	Last
Unit	Service Order ID	Status	Priority	Line	Activity	Act Status	Act Priority	Start Date	Start Time	End Date	End Time					
US200	0000000050	Open	Urgent	1		Assigned	Urgent									
US200	0000000057	Open	Urgent	1		Assigned	Urgent									

Audit History

Provider Group Member page (1 of 2)

To view details about the selected provider group, click the Transfer to Provider Group button that is next to the provider group ID to access the Provider Group page.

Member Information

Name Displays the name of the group member that you enter when adding the record.

Note. You can also define members of the provider group on the Provider Group page.

Currency Code Select the currency that you use to determine the labor costs for the work that the group member provides. The selected currency becomes the default for new rows in the Member Cost Categories group box. Currency codes are established on the Currency Code page.

Member Cost Categories

The Member Cost Categories group box reflects the costs per hour and corresponding billable rates for the member.

Cost Category Select the code of the cost category that you use to account for the labor time of the group member. Define cost category codes on the Cost Categories page.

Hourly Rate, Currency Code, Multiplier, and Billable rate Use these field to establish the rate, currency, and multiplier by which you want to bill a customer for the selected cost category for the member. When you save the page, the system multiplies the hourly rate by the value in the Multiplier field to calculate the billable rate.

Assigned Service Orders

Use this section to view service order assignments for the group member. The system displays this grid only if the user has at least one assigned service order. Similarly for cases, the system displays the Assigned Cases grid only if the user has one or more assigned cases.

Unit	Displays the PeopleSoft Integrated FieldService business unit where the service order originated.
Service Order	Displays the number of the service order that is assigned to the group member. Click the Transfer to Service Order button to access that service order.

Assigned Cases

Use this section to view case assignments for the group member.

Unit	Displays the PeopleSoft Support, HelpDesk, or HelpDesk for Human Resources business unit where the case originated.
Case ID	Displays the number of the case that is assigned to the group member. Click the Transfer to Case button to access that case.

See Also

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Setting Up Services"

Enterprise PeopleTools 8.50 PeopleBook: Security Administration

Defining Schedules for Provider Groups

Schedule information determines when the provider group is available for assignment.

Page Used to Define Schedules for Provider Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Schedule	RF_PROVGRP_TIME	Workforce, Provider Groups, Schedule	Define the hours of operation for a specific provider group.

Defining Schedules

Access the Schedule page (Workforce, Provider Groups, Schedule).

Schedule page

To define hours of operation for a provider group:

1. Specify the appropriate time zone.

The time periods that you define in Hours of Operation group box appear in the time zone that you select.

2. Specify the appropriate holiday schedule, if applicable.

If the date that an assignment search is performed corresponds to a holiday for a provider group, the system indicates that the provider group is unavailable for assignment. Define holiday schedules by using the Holiday Schedule page under Set Up CRM, Common Definitions, Calendars and Schedules.

Note. You can update workers' calendars with specified holiday schedules by running the Load Holiday process (RF_HOLIDAY).

3. Select the days of the week that the provider group is open for business transactions.

If the date that an assignment search is performed corresponds to a day that a provider group is not open for business transactions, the system indicates that the provider group is unavailable for assignment.

4. For each day of the week, specify the hours of operation.

Enter start and end times for each work period in the day. You can enter multiple work periods to represent lunch breaks, shifts, and so forth. Establish default values for this page on the Installation - Calendar Options page under Set Up CRM, Install, Installation Options.

See Also

[Chapter 14, "Setting Up and Performing Assignment Searches," page 217](#)

[Chapter 15, "Defining Holiday Schedules," Associating Workers with Holiday Schedules, page 252](#)

[Chapter 15, "Defining Holiday Schedules," Updating Workers' Calendars with Specified Holiday Schedules, page 252](#)

Defining Group Assignment Criteria and Competencies

This section discusses how to:

- Define assignment criteria.
- Associate competencies with provider groups.

Pages Used to Define Group Assignment Criteria and Competencies

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Assign Group Criteria	RF_PRV_GRP_CRIT	Workforce, Provider Groups, Assign Group Criteria	Define the criteria that you use to match a provider group to a case or service order.
Group Competencies	RF_PRVGRP_COMP	Workforce, Provider Groups, Group Competencies	Associate a provider group with a list of competencies and define the provider group's level of proficiency for each competency.

Defining Assignment Criteria

Access the Assign Group Criteria page (Workforce, Provider Groups, Assign Group Criteria).

Provider GroupsScheduleAssign Group CriteriaGroup Competencies

SetID CRM01Provider Group ID APLE

Region

CustomizeFind

*Region Description

Eastern

Customer

CustomizeFind

*SetIDCRM01

*CustomerMMA Property Management Group

Site

Product

CustomizeFind

*SetID	*Product Description	*Proficiency		
CRM01	26.7 cu. Ft. Refrigerator w/Fc	4-Very Good	+	-
CRM01	21.6 cu. Ft. Top Refrigerator	4-Very Good	+	-
CRM01	24.7 cu. Ft. Refrigerator w/Fc	4-Very Good	+	-
CRM01	19.6 cu. Ft. Top Refrigerator	4-Very Good	+	-
CRM01	14.8 cu. Ft. Chest Freezer Fla	5-Expert	+	-
CRM01	7.2 cu. Ft. Chest Freezer Flas	5-Expert	+	-
CRM01	22.8 cu. Ft. Chest Freezer Man	5-Expert	+	-

Assign Group Criteria page (1 of 2)

Product Group			
Customize Find [Icon] [Icon]			
*SetID	*Product Group		
CRM01	REFRIDGE	[+]	[-]
CRM01	FREEZER	[+]	[-]

Person Type		Customize Find [Icon] [Icon]
*Person Type		
		[+]

Location		Customize Find [Icon] [Icon]
*SetID	*Location	
		[+]

Department		Customize Find [Icon] [Icon]
*SetID	*Department	
		[+]

Security Role		Customize Find [Icon] [Icon]
*Role Description		
		[+]

Audit History	

Assign Group Criteria page (2 of 2)

When an assignment search is performed from a case or service order, the assignment engine calculates a point value for each criteria value on the service order or case that the provider group matches, based on the weight, or relative importance of the match. The sum of the point values becomes the provider group's fit score. Failure to match a criterion does not exclude the provider group from the list of suggested assignment candidates, but it lowers the provider group's total fit score.

For help desk cases, the assignment engine matches values for department, location, product, and product group. For service orders and support cases, the assignment engine matches values for customer, site, region, product, and product group. For Service Center for Higher Education cases, the assignment engine can match values on a combination of these parameters.

Enter each region, customer, product, product group, location, department, and role that the provider group supports.

Region

Region information can be derived from information that is on the service order or case. At least one region is required.

Customer

If the provider group can support a customer at any site, enter the customer and leave the Site field blank. You can also select a site without specifying a customer.

Product

Enter the setID and the name of the product and the group's proficiency level for supporting the product. Available values for the Proficiency field depend on the product rating model that you specify for the setID on the Assignment Setup page of the Assignment Engine Setup component under Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors.

Product Group

Enter the product group that the provider group supports.

Person Type

Select the person type that the provider group supports. IT and HR Help Desk use the person type of the person on the case to assign provider groups and agents to cases based on the person's relationship to the organization. The available person types are *Contingent Worker*, *Employee*, and *Person of Interest*; . When assigning HR Help Desk cases, the Person of Interest person type is not considered.

Location

Enter the location that the provider group supports.

Department

Enter the department that the provider group supports.

Security Role

Enter the role that the provider group supports.

Note. Change management is the only product that uses role criteria for assignments.

See Also

Chapter 14, "Setting Up and Performing Assignment Searches," page 217

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Setting Up Products"

Associating Competencies with Provider Groups

Access the Group Competencies page (Workforce, Provider Groups, Group Competencies).

Provider Groups | Schedule | Assign Group Criteria | **Group Competencies**

SetID CRM01 Provider Group ID APLE

Assigned Competencies Customize | Find | First 1-3 of 3 Last

*Description	*Proficiency	
Appliances Service & Repair	5-Expert	
Ability to manage own time	4-Very Good	
Effectively manages own time	4-Very Good	

[Add Competenc](#)

[Audit History](#)

Group Competencies page

PeopleSoft Integrated FieldService can evaluate which provider group is best qualified for assignment to a service order by comparing provider group competency and proficiency with the competency and proficiency that is required for a service or service activity on a service order.

Similarly, in PeopleSoft Support and PeopleSoft HelpDesk, the system can evaluate which provider group is qualified for assignment to a case by matching the competency and proficiency that you specify on the case in the Problem Type field with the competency that is defined for the provider group.

Assigned Competencies

Description Select a competency. Establish competencies on the Competencies page of the Competencies component under Set Up CRM, Common Definitions, Competencies.

Proficiency Select the provider group's level of expertise for the competency. The rating model that you define for the competency on the Competencies page determines the available proficiency values. In PeopleSoft Integrated FieldService, PeopleSoft Support and PeopleSoft HelpDesk, the system checks a provider group's proficiency level to determine whether the provider group is qualified to perform work on a service order or case that requires the competency.

See Also

[Chapter 14, "Setting Up and Performing Assignment Searches," page 217](#)

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Workers"

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Setting Up Products"

Chapter 13

Managing Workforce Competencies

This chapter provides an overview of competencies in PeopleSoft Customer Relationship Management (PeopleSoft CRM) and discusses how to set up competency information.

Understanding Competencies in PeopleSoft CRM

This section discusses:

- Competencies.
- Competency integrations.

See Also

Chapter 14, "Setting Up and Performing Assignment Searches," page 217

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Setting Up Products"

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Setting Up Services"

Chapter 3, "Setting Up General Options," Setting Up PeopleSoft Enterprise CRM Application Installation Options, page 27

PeopleSoft Enterprise HRMS Application Fundamentals PeopleBook

Competencies

In PeopleSoft CRM, competencies define the skills of the workforce. You can associate a set of competencies with provider groups and workers and define the competency proficiency level for each provider group and worker.

In PeopleSoft Integrated FieldService, define competency requirements for the services that the company provides, and the minimum level of competency proficiency that is required to perform a service or service activity.

Similarly, in PeopleSoft call center applications, you set up minimum competency proficiency requirements for the problem type, category, type or detail information that are used for case assignment. By comparing the competency requirements with the competencies that you define for your workforce, the system can generate a list of qualified candidates to assign to a case.

You can enter competencies and competency proficiency ratings by using components within PeopleSoft CRM or by integration with PeopleSoft Human Capital Management (PeopleSoft HCM) or a third-party human resource management system.

Competency Integrations

These are the enterprise integration points (EIPs) that update CRM competencies with HCM competencies.

Person Competency

This EIP synchronizes system tables with competency information that you define in a Human Resources system. The Person Competency EIP includes two application messages: PERSON_COMPETENCY_FULLSYNC and PERSON_COMPETENCY_SYNC.

At initial implementation, the HCM publishes a full set of competency records to PeopleSoft CRM by using the PERSON_COMPETENCY_FULLSYNC application message. When a user adds or modifies competency definitions in the human resources management system after the initial full synchronization, each change is published to PeopleSoft CRM by using the PERSON_COMPETENCY_SYNC application message.

Warning! A FULLSYNC overwrites any changes that you made to competency information in CRM.

Rating Model

The RATING_MODEL_FULLSYNC and RATING_MODEL_SYNC messages are used to initially load rating models from a Human Resources system and to update competency rating models, respectively.

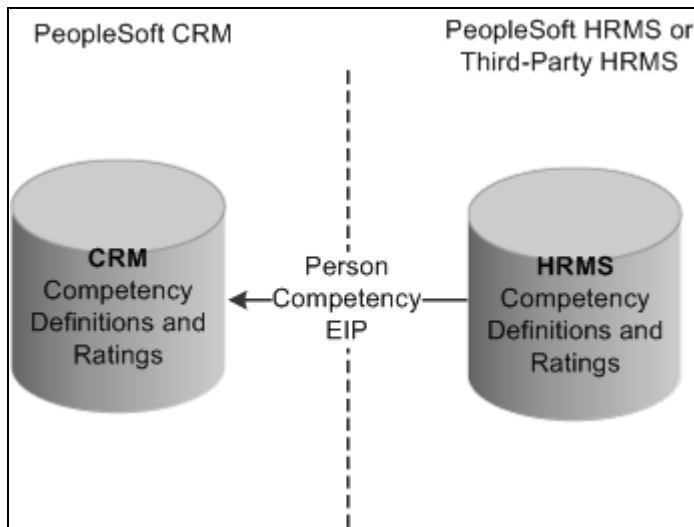
Competency

The COMPETENCY_SYNC and COMPETENCY_FULLSYNC messages are used to initially load rating models from a Human Resources system and to update competency rating models, respectively.

Flow of Integration

PeopleSoft CRM is a subscriber to competency EIP messages, not a publisher. Any changes that you make to competency definitions or ratings in PeopleSoft CRM are not published or synchronized with the human resources management system.

Make all updates to competency records in your human resources management system and publish them to PeopleSoft CRM, as the following diagram illustrates:



Flow of competency information from the human resources management

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Managing Enterprise Integration for PeopleSoft Enterprise CRM"

Setting Up Competency Information in PeopleSoft CRM

To define competency information, use the Review Rating (CM_REVW_RATING), Competency Type (CM_TYPE_TABLE), and Competency (COMPETENCY_TBL) components.

If you do not synchronize competency information with another system by using the Person Competency EIP, you can manually define competency rating models, competencies, and the competency proficiency for workers by using components in PeopleSoft CRM.

This section discusses how to:

- Define competency rating models.
- (Optional) Define competency types.
- Define competencies.
- Define competency proficiency levels.
- Define minimum competency requirements for service orders and cases.

Pages Used to Set Up Competency Information in PeopleSoft CRM

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Competency Rating Model	CM_REVW_RATING_TBL	Set Up CRM, Common Definitions, Competencies, Competency Rating Model, Competency Rating Model	Define codes that you want to use to indicate a provider group or worker's level of proficiency for a competency that is required to perform a service or support a product.
Competency Types	CM_TYPE_TABLE	Set Up CRM, Common Definitions, Competencies, Competency Types, Competency Types	Define competency types, broad categories of competencies that are relevant to particular positions or projects. When you define a competency, it can be associated with one or more types.
Competencies	COMPETENCY_TABLE	Set Up CRM, Common Definitions, Competencies, Competencies, Competencies	Establish IDs for competencies and then tie the ID to the rating model and competency types.





Defining Competency Rating Models

Access the Competency Rating Model page (Set Up CRM, Common Definitions, Competencies, Competency Rating Model, Competency Rating Model).











Competency Rating Model

Rating Model A

Description Find | View All First 1 of 1 Last

*Effective Date 01/01/1980  Status Active   

*Description OPM Rating of Record Pattern A Short Description Pattern A

*Rating	*Description	Short Description	Rating Points		
1	Unacceptable	Unacceptab	0		
2	Minimally Successful	MinSuccess	0		
3	Fully Successful	Fully Succ	0		
4	Superior	Superior	0		
5	Outstanding	Outstandng	0		

Competency Rating Model page

A rating model specifies how you measure a provider group or worker's proficiency for a particular competency.

Rating Levels

Rating

Enter a code that represents the rating level. When defining a rating, you must enter a code by using one alphanumeric character.

Description

Enter a description of the rating code by using up to 30 alphanumeric characters.

Note. 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.

Rating Points

Enter a numeric value that the assignment engine uses to represent the relative importance of each rating.

Important! When defining rating point scales for rating models that are used to rate the proficiency of a provider group or worker, use a numeric rating system in which the highest number of points represents the highest level of proficiency. Otherwise, the fit score values that the assignment engine calculates will not accurately reflect the best qualified candidate. The minimum proficiency, however, is tied to a service, not within the rating model.

See Also

[Chapter 14, "Setting Up and Performing Assignment Searches," page 217](#)

Defining Competency Types

Access the Competency Types page (Set Up CRM, Common Definitions, Competencies, Competency Types, Competency Types).

Competency Types

Competency Type ACCNT

*Description Accountability

Short Description Accntabity

Competency Types page

Although competency types are not used by the system, you can develop reports that reflect competency categories.

Defining Competencies

Access the Competencies page (Set Up CRM, Common Definitions, Competencies, Competencies, Competencies).

Competencies

Competency ID 0100

*Description Abstract thinking

Short Description Abstract

*Rating Model PSCM Competency Management Scale

Comments Able to analyze multi-faceted concepts determining a sound solution. Able to think "out-of-the-box". Uses innovative solutions to solve problems.

Competency Types		Customize	Find			First	1 of 1	Last
Type	Description							
INTEL	Intellectual							

Competencies page

Competencies can represent any provider group or worker skills, abilities, knowledge, product support areas, or behaviors that are pertinent to jobs in the organization, such as 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 broad or detailed and can represent any type of competency.

To enable system-suggested assignments on service orders, define each skill that is required to complete work on a service order as a competency in your system. To enable system-suggested assignments on cases that are based on the problem type, category, type or detail that the user specifies, define competencies that correspond to this information.

Description	Enter a description that uses up to 30 alphanumeric characters.
	Note. These descriptions should make sense to a user that is viewing a list of problem types. For example, competencies like <i>Works independently</i> or <i>Microsoft Certification</i> are probably not appropriate descriptions for problem-type competencies. If the product is a laptop, appropriate problem type competencies may include <i>hard drive</i> and <i>network connectivity</i> .
Rating Model	Select the model that is used to evaluate a provider group or worker's degree of expertise for this competency. Establish rating models on the Competency Rating Model page.
Type	Select competency types for this competency, if applicable. Establish competency types on the Competency Types page.

Defining Competency Proficiency Levels

You establish competency proficiency for provider groups on the Group Competencies page of the Provider Groups component. Similarly, you establish competency proficiency for workers on the Competencies page of the Worker component.

The system uses the level of competency proficiency that you define for provider groups and workers to evaluate whether the provider group or worker is qualified to perform work on a service order or provide support on a case. You can also track the competency proficiency of your workforce for informational purposes.

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Workers"

[Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," page 191](#)

Defining Minimum Competency Requirements for Service Orders or Cases

In PeopleSoft Integrated FieldService, the system evaluates which workers are qualified to perform work on a service order by matching the minimum level of competencies that you define for the associated service or service activity with workers' proficiency for the corresponding competencies.

In PeopleSoft call center applications, you establish minimum competency proficiency requirements for the problem type, category, type or detail information on cases, which the system uses when performing call center agent assignment.

See Also

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Setting Up Services"

PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook, "Setting Up Call Center Prompt Tables"

Chapter 14

Setting Up and Performing Assignment Searches

The chapter provides an overview of assignment searches and discusses how to:

- Set up the assignment searches.
- Reviewing and assigning provider groups.
- Reviewing and assigning group members.

Understanding Assignment Searches

This section discusses:

- Fit scores.
- Activity.
- Assignment criteria.
- Candidate selection and fit score generation.

Fit Scores

In PeopleSoft Customer Relationship Management (PeopleSoft CRM), you can perform assignment searches to find the provider groups and group members that are best suited to a case or service order. The system returns a list of eligible candidates ranked by *fit score*, which is an evaluation of how well each provider group or group member matched criteria on the case or service order.

In addition to fit score, the system displays current availability and, for group member assignment searches that are performed for a case, the number of open cases that are currently assigned to the group member.

The system doesn't restrict the workforce assignment only to what it suggests. You can select the provider group and group member that the system recommends, any provider group and group member on the list (regardless of the fit score, current availability, or case load), or any provider group and group member that does not appear on the list, to be assigned to a case or service order.

Note. If you use auto-assignment to assign a provider group member to a case and multiple members tie for the highest fit score, the system assigns the member with the lowest case load. If two or more members tie for highest fit score and lowest case load, the system selects the first person in the list. In this situation the system makes an arbitrary assignment based on the member with the lowest person ID.

Activity

The system displays the activity from the service order.

Because a competency may be required for more than one activity, this column indicates the activity to which the competency applies. This column does not appear when you perform the assignment search from a case.

Assignment Criteria

PeopleSoft CRM uses the assignment engine to generate recommendations for provider group and group member assignments. The assignment engine uses this information in the assignment evaluation process:

- General assignment criteria.
- Case-specific assignment criteria.
- Service order-specific assignment criteria.
- Weighting factors.
- Assignment search data model.

General Assignment Criteria

For each worker or provider group, you can define a list of values that the worker or provider group specializes or supports under these criteria: customer, location, product, product group, region, site, department, person type, security role.

When you perform an assignment search on a service order or case, the assignment engine matches the values of these criteria that are available on the service order or case to the values that are available on workers and provider groups. The weight, or relative importance, of each assignment criteria match determines a candidate's fit score.

Failure to match an assignment criteria value on a case or service order lowers the fit score but does not exclude a provider group or group member from the list of eligible candidates. However, if you do not select the Display Provider Groups and Group Members with no Criteria Matches check box on the Assignment Setup page, then a provider group or group member must match at least one criteria or competency value to be included in the list.

The assignment engine uses a different set of assignment criteria values when searching for a case in PeopleSoft HelpDesk or Support, or for a service order in PeopleSoft Integrated FieldService.

The table below illustrates:

- For help desk cases, the assignment engine matches values for department, location, product, product group, person type, problem type, and category, type, and detail (CTD) competencies.

- For help desk change requests, the assignment engine matches values for department, location, product, product group and security role. Help desk change requests are matched only against provider groups.
- For support cases, the assignment engine matches values for customer, site, region, product, product group, problem type, and CTD competencies.
- For service orders, the assignment engine matches values for customer, site, region, product group, product, service (or service activity) competency.
- For Service Center for Higher Education cases, the assignment engine matches values according to either help desk or support case criteria, based on the caller for the case. If the caller is a worker, help desk criteria is used: if the caller is a company contact or consumer (constituent), support criteria is used.

<i>Assignment Criteria</i>	<i>Used in Support Case?</i>	<i>Used in Help Desk Case?</i>	<i>Used in Help Desk Change Request?</i>	<i>Used in Service Order?</i>
Competency - CTD	Yes	Yes	Yes	NA
Competency - Problem Type	Yes	Yes	Yes	NA
Competency - Service	NA	NA	NA	Yes
Customer	Yes	NA	NA	Yes
Location	NA	Yes	Yes	NA
Product	Yes	Yes	Yes	Yes
Product Group	Yes	Yes	Yes	Yes
Region	Yes	NA	NA	Yes
Site	Yes	NA	NA	Yes
Person Type	No	Yes	No	No
Department	No	Yes	Yes	No
Security Role	No	No	Yes	No

As mentioned in the table, the assignment engine uses the region information to perform service order and support case assignment. A region search occurs when the Incident Address group box is available on a Case or Service Order page (according to the associated configuration template) with a specified incident location or when a region is associated with the site, contact, or customer on the transaction. The assignment engine runs the region search based on the zip code that you specify in the incident location.

Note. This is only if the incident location is being displayed. If not, the region is determined by the customer specified. In this case, the region match starts with this region (not the parent region like it does for zip code). The region is derived from a hierarchy based upon the site, contact and customer. When a service order or case is created, the region is determined by obtaining the region, if available, from the site, then the contact and customer. If a new region is specified for the site, customer or contact, there will be no region to match on with the assignment engine.

Before using zip codes as regions as assignment criteria, you must:

- Use the Region component to add zip codes as individual regions.
- Create a region, such as the Santa Clara county, and make it the parent region for all appropriate zip codes.

Note. You should define regions with the category of *Geography*.

When the assignment engine runs, the zip code of the incident location determines the region. The system looks for the zip code with a category of *Geography* in the region table and starts with the parent region for assignment matches.

The system continues to look at the region hierarchy and reports region matches for any provider groups and group members that match the parent or grandparent regions. For example, if the parent region of Santa Clara County is Northern California, then the system includes any provider groups or group members associated with Santa Clara County or Northern California. If the provider group or group member is associated with both Santa Clara and Northern California, the match will be on the lower region (in this case, Santa Clara County).

Case-Specific Assignment Criteria

For assignment searches that you perform for cases, you can match the problem type and CTD competencies of the case with competencies that are defined for group members and provider groups.

You can specify competencies for problem types, categories, specialty types and details to be used when the system performs an assignment search from a case in PeopleSoft Support or HelpDesk.

The assignment engine matches the competency values in these fields on the case with group members or provider groups that are associated with the same competency values. Any provider group or group member that does not meet the minimum competency proficiency defined for the CTD or problem type will not have a match for the competency.

Note. There is a hierarchical relationship among category, specialty type, and detail. A category includes specialty types, which contain details. When all three levels of information are available in a case that needs to be assigned, the value from the lowest available level is used in the assignment search. For example, if the case has a category, specialty type and detail, the assignment uses the competency information that is defined for detail when performing the assignment search. If it has category and specialty type, the system uses the competency information for type. If it has only the category, the system uses the competency information for category.

Service Order-Specific Assignment Criteria

For assignment searches that you perform for service orders, the assignment engine matches (besides general assignment criteria) the competency proficiency of provider groups and group members with the minimum competency proficiency requirements on the service (or service activity). Any provider group or group member that does not meet the minimum competency proficiency that is defined for the service or service activity will not have a match for the competency.

The service competency data that the assignment engine uses depends on:

- Whether competency data is defined for a service or service activity.
- Whether the assignment search is initiated from the service order activity actions section or the service order line.

If activities are defined for the service, the assignment engine uses only the competency requirements that are defined for the activities, even if competencies are also defined for the service.

If you perform the assignment search from the service order activity actions for a service with one or more activities, the system evaluates provider group or group member competency against the competency requirements that are defined for all activities that are associated with the service.

If you perform the assignment search from the service order line, the system considers only the competency requirements of the activity on the line.

If no activities are defined for the service, the assignment engine uses the competency information that is defined for the service. If no competencies are defined for the service, the assignment engine does not perform a competency match; it uses only assignment criteria matches to evaluate candidates for service order assignment.

Weighting Factors

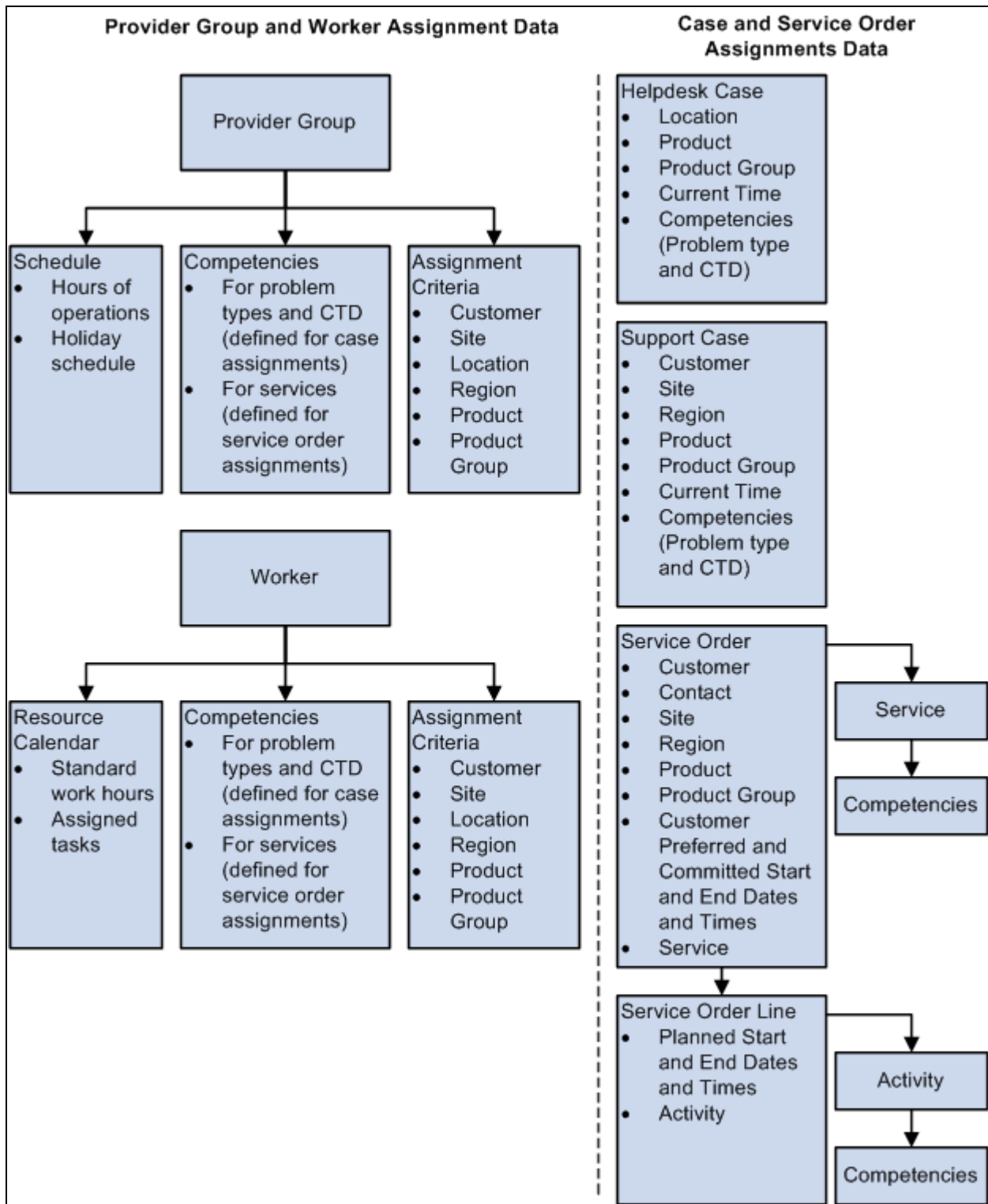
You can define the relative importance of assignment criteria for provider group and group member searches. These weights may differ between the provider group and group member.

For example, if the CTD competency (applicable to support and help desk cases) has no importance when assigning provider groups in cases, but region is important, set the group weight for the CTD competency to 0 and the weight for region to 5.

If CTD competency and product are equally important and customer is somewhat important for group member searches, you can then set the weights to 5, 5, and 3, respectively.

Assignment Search Data Model

This diagram illustrates the information that the assignment engine uses to generate a list of provider groups or worker candidates to assign to tasks on a help desk case, support case, or service order and to display current availability status:



Assignment Search Data Model

Note. The HelpDesk case, provider group assignment criteria, and worker assignment criteria should also contain the person type.

See Also

Chapter 13, "Managing Workforce Competencies," page 209

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Workers," Maintaining Worker Information

Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," page 191

Chapter 16, "Using Calendars," page 255

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Setting Up Products," Defining Products

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Setting Up Services"

PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook, "Setting Up Call Center Prompt Tables"

Candidate Selection and Fit Score Calculations

For both provider group and group member searches, the assignment engine builds a table in the database that represents each criteria match between provider groups or group members and the values on a service order or case.

After completing the search, the system returns a list of the provider groups or group members with criteria matches. The aggregate fit score of the provider groups or group members sequences the list.

Evaluating Workforce Assignment

For each assignment criteria match between a provider group or group member and the evaluated help desk case, support case, or service order, the system inserts a row into a temporary table called Criteria Fit (RF_ASSIGN_FIT).

Each row includes the name of the group member or provider group, 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 that are assigned to the match.

For matches on problem type competency, CTD competency, or both, the number of points depends on the number of competencies and the provider group or group member's proficiency for those competencies.

For service competency matches, the number of points also depends on the number of competencies and the provider group or group member's proficiency for those competencies. For these reasons, the number of competency points may be less than the competency weight.

Determining Workforce Availability

The system determines the availability status of each provider group or group member. For provider groups, the system checks the hours of operation and the holiday schedule that you define for the provider group on the Schedule page in the Provider Group component.

If the customer preferred (or committed, if customer preferred doesn't exist) start and end dates and times on a service order, or the current date and time on a case, correspond to an open period for the provider group, and if the start and end dates are not on their holiday schedule, the provider group is considered available for assignment.

For group members, the system checks for tasks on the worker's resource calendar as well as the worker's schedule.

If the customer preferred start and end dates and times on a service order (if they don't exist, the system uses the committed dates), or the current date and time on a case, correspond to a period during the group member's standard work hours for which no other task has been assigned, the group member is considered available for assignment.

Establish standard workweek and workday hours during installation on the Calendar Options page (select Set Up CRM, Install, Installation Options). You can modify an individual worker's standard hours on the Schedule page in the Worker component.

Displaying Case Load for Candidates

For group member assignment searches that you perform from a case, the system determines how many open cases are currently assigned to the group member. To facilitate workload balancing, this information appears for each agent who is returned for a group member search.

Calculating Candidate Fit Scores

For each provider group or group member with a criteria match that is recorded in the Criteria Fit table, the system sums the weight value that is associated with each criteria match row and calculates the fit score for the provider group or group member using this equation:

$$\text{Fit score} = \frac{\text{Total number of match points for the provider group or group member}}{\text{Number of possible match points for the case or service order}} \times 100$$

Fit score

where the number of possible match points is defined by the criteria weight factor.

For example, for a group member assignment search, suppose that Jon Smith matched three assignment criteria (region, customer, and site) on a service order for which no competency requirements were defined, and this is the weight for each of the matching assignment criteria that applies to service orders:

- Customer = 5
- Region = 4
- Product = 3
- Site = 0
- Competency - Service = 4

The total number of possible match points is the total of the weight values: $5 + 4 + 3 + 0 + 4 = 16$.

For the service order in this example, Jon Smith matched region, customer, and site. His total number of match points is calculated as follows:

$$4 + 5 + 0 = 9$$

$$\text{Jon's fit score} = 9 / 16 \times 100 = 56\%$$

Accounting for Competency Proficiency on a Service Order

When calculating fit scores for service order assignments, the assignment engine accounts for the provider group or group member's competency proficiency and the relative importance of the competency that is defined for the service or service activity using this equation:

$$\text{Competency score} = \frac{(C1Wt * C1CP) + (C2Wt * C2CP) + \dots (CnWt * CnCP)}{(C1Wt * C1MP) + (C2Wt * C2MP) + \dots (CnWt * CnMP)}$$

Competency score

- $CnWt$ is the weight of the competency defined for the service or service activity.
- $CnCP$ is the candidate's proficiency rating for the competency.
- $CnMP$ is the maximum proficiency rating.

For example, suppose that 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: basic maintenance and compressor replacement.

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.

This 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

This table shows the competency proficiency rating for three technicians, Jon Smith, Bill Jones, and Jane Markowitz:

Worker	Basic Maintenance Competency Proficiency (C1CP)	Compressor Replacement Competency Proficiency (C2CP)
Jon Smith	4	3
Bill Jones	2	0
Jane Markowitz	5	4

The competency score for each technician is calculated as follows:

Jon Smith's competency score = $(5 * 4) + (2 * 3) / (5 * 6) + (2 * 6) = 0.62$

Bill Jones' competency score = $(5 * 2) / (5 * 6) + (2 * 6) = 0.24$

Notice that Bill Jones did not match the proficiency requirements for the compressor replacement competency; therefore, no points for the match are included in the calculation.

Jane Markowitz's competency score = $(5 * 5) + (2 * 4) / (5 * 6) + (2 * 6) = 0.79$

To calculate the fit score for each worker, the competency score is multiplied by the assignment weighting factor of the corresponding assignment criterion, which is defined for you in your installation.

Let's assume that the same criteria weight factors as in the previous fit score calculation example: Customer = 5, Region = 4, Product = 3, Site = 0, Competency - Service = 4.

Let's also assume that, except for the competency proficiency on competency - service, Jon, Bill, and Jane matched on identical criteria. Their fit scores are calculated as follows:

Jon Smith's fit score = $4+5+0+(4*0.62)/ 5+4+3+0+4 = 0.717$

Bill Jones's fit score = $4+5+0+(4*0.24)/ 5+4+3+0+4 = 0.622$

Jane Markowitz's fit score = $4+5+0+(4*0.79)/5+4+3+0+4 = 0.76$

The assignment engine sorts these candidates:

- Jane Markowitz, 76%
- Jon Smith, 72%
- Bill Jones, 62%

If you view the detail scores, the system displays the criteria matches that compose the fit scores. For example, under Jon Smith's name, you would see this breakdown:

Criteria	Competency	Score
Region	NA	4/16 = 25%
Customer	NA	5/16 = 31.3%

Criteria	Competency	Score
Site	NA	0/16 = 0%
Competency - Service	Basic Maintenance	$(4 \times (5 \times 4) / 42) / 16 = 11.90\%$
Competency - Service	Compressor Replacement	$(4 \times (2 \times 3) / 42) / 16 = 3.6\%$

Accounting for Competency Proficiency on a Case

Similar to calculating service and service activity competencies, when the assignment engine calculates fit scores for case assignments, it accounts for the provider group or group member's competency proficiency and the relative importance of the competency values that are specified for problem type or CTD on the case using this equation:

$$\text{Competency score} = \frac{(C1Wt \cdot C1CP) + (C2Wt \cdot C2CP) + \dots (CnWt \cdot CnCP)}{(C1Wt \cdot C1MP) + (C2Wt \cdot C2MP) + \dots (CnWt \cdot CnMP)}$$

Competency score

- $CnWt$ is the weight of the competency that is defined for the problem type or CTD.
- $CnCP$ is the candidate's proficiency rating for the competency.
- $CnMP$ is the maximum proficiency rating.

For example, suppose that the case involves a problem with a personal computer (PC) and the required problem type competency and category competency are IBM PC Hardware and PC Configuration, respectively. If Jon Smith has a proficiency of 4 on a 1 to 6 rating scale for both competencies, then Jon's competency score for problem type is:

$$4 / 6 = 0.666$$

His competency score for the category is also 0.666.

Let's assume that the following criteria weight factors are set:

Customer = 5, Region = 4, Product = 3, Site = 0, Competency - Problem Type = 4, Competency - CTD = 4.

If Jon Smith matches the customer and both competencies on the case, then his fit score is calculated as follows:

$$\text{Jon Smith's fit score} = 5 + (4 \cdot 0.666) + (4 \cdot 0.666) / 5 + 4 + 3 + 0 + 4 + 4 = 0.516 \text{ or } 52\%$$

Accounting for Product Proficiency on a Service Order or Case

When calculating fit scores for service order and case assignments, the assignment engine accounts for the provider group or group member's product proficiency using this equation:

$$\text{Product score} = PCP / PMP$$

- PCP is the candidate's proficiency rating for the product.
- PMP is the maximum proficiency rating.

For example, suppose that the case or service order involves a problem with an air conditioner.

If Bill Jones has a proficiency of 2 for this product on a 1 to 6 rating scale, then Bill's product score is:

$$2 / 6 = 0.333$$

Let's assume that the criteria weight factors are the same as in the previous examples:

Customer = 5, Region = 4, Product = 3, Site = 0, Competency - Problem Type = 4, Competency - CTD = 4.

If Bill Jones matches the customer and product on the case or service order, this is how his fit score is calculated:

$$\text{Bill Jones' fit score} = 5 + (3 * 0.333) / 5 + 4 + 3 + 0 + 4 + 4 = 0.299 \text{ or } 30\%$$

See Also

Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," page 191

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Workers," Maintaining Worker Information

Chapter 13, "Managing Workforce Competencies," page 209

Setting Up the Assignment Searches

To define assignment searches, use the Worker (RD_WORKER_2), Provider Group (RF_PROVIDER_GRP), Service (RF_SERVICE), Problem Type (RC_PROBTYPE), Category Type Detail (RC_CA_TY_DE) and Assignment Weighting Factors (RF_ASSIGNMENT_WGHT) components.

This section discusses how to:

- Define worker schedules and assignment criteria.
- Define provider group schedules and assignment criteria.
- Associate competency information with services and service activities.
- Associate competency information with problem types.
- Associate competency information with categories, and specialty types and details.
- Establish weighting factors for provider group criteria matches.
- Establish weighting factors for group member criteria matches.
- Specify assignment engine setup.

Pages Used to Set Up Assignment Searches

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Job	RD_ASGN_JOB	Workforce, Search Worker, Job	Specify a holiday schedule for the worker. This information helps to determine worker's availability.
Work Schedule	RD_WORKER_SCHEDULE	Workforce, Search Worker, Work Schedule	Specify worker's workday information if it differs from the information that you define for the installation on the Calendar Option page. This information helps to determine worker's availability.
Skills and Competencies	RD_WORKER_CMP_PROF	Workforce, Search Worker, Skills and Competencies	Associate competency information with the worker. This information is optional.
Assignment Criteria	RD_WORKER_CRITERIA	Workforce, Search Worker, Assignment Criteria	Define assignment criteria for the worker. This information is optional.
Schedule	RF_PROVGRP_TIME	Workforce, Provider Groups, Schedule	Specify a holiday schedule and workday information for the provider group. This information helps to determine provider group's availability.
Assign Group Criteria	RF_PRV_GRP_CRIT	Workforce, Provider Groups, Assign Group Criteria	Define assignment criteria for the provider group. The Region criterion is required when defining provider groups.
Group Competencies	RF_PRVGRP_COMP	Workforce, Provider Groups, Group Competencies	Associate competency information with the provider group. This information is optional.
Service Details	RF_SERVICE_ATTRIB	Set Up CRM, Product Related, FieldService, Services, Service Details	Associate competency information with the service. This information is optional.

Page Name	Definition Name	Navigation	Usage
Service Activities	RF_SERVICE_ACT	Set Up CRM, Product Related, FieldService, Services, Service Activities	Associate competency information with the service activity. This information is optional.
Problem Type	RC_PROBTYPE	Set Up CRM, Product Related, Call Center, Problem Type, Problem Type	Associate competency information with the problem type. You use problem types to associate competencies with products that a worker needs to resolve a problem with the product. This information is optional.
Category	RC_CATEGORY	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Category	Associate competency information with the category. This information is optional.
Type and Detail	RC_CA_TY_DE_PNL	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Type and Detail	Associate competency information with the type and detail. This information is optional.
Group Weighting Factors	RF_ASSIGN_WGHT_PG	Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Group Weighting Factors	Establish the relative importance of assignment criteria matches for customer, location, product, product group, region, site, department, person type, role, and competency values on CTD, problem type, and service during assignment searches for provider groups.
Member Weighting Factors	RF_ASSIGNMENT_WGHT	Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Member Weighting Factors	Establish the relative importance of assignment criteria matches for customer, location, product, product group, region, site, department, person type, role, and competency values on CTD, problem type, and service during assignment searches for provider group members.
Assignment Setup	RF_PRD_RATE_MDL	Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Assignment Setup	Specify the rating model that is used to define proficiency levels for product competencies and configure search results.

Defining Worker Schedules and Assignment Criteria

Define workers using the Worker component.

Specifying Holiday Schedules

Access the Job page (Workforce, SearchWorker, Job).

Note. You are not required to define standard workweek information for your installation or for individual workers. However, the system requires this information to create entries automatically on a worker's calendars when a service order is assigned to the worker.

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Defining Workers," Entering Job Details.

See [Chapter 15, "Defining Holiday Schedules," page 247.](#)

Specifying Workday Information

Access the Work Schedule page (Workforce, SearchWorker, Work Schedule).

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Defining Workers," Defining Default Schedules.

Associating Competencies with Workers

Access the Skills and Competencies page (Workforce, SearchWorker, Skills and Competencies).

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Defining Workers," Associating Competencies with Workers.

See [Chapter 13, "Managing Workforce Competencies," page 209.](#)

Defining Assignment Criteria

Access the Assignment Criteria page (Workforce, SearchWorker, Assignment Criteria).

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Defining Workers," Defining Job Assignment Criteria.

See [Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," Defining Group Assignment Criteria and Competencies, page 204.](#)

See Also

[Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," page 191](#)

Defining Provider Group Schedules and Assignment Criteria

Every worker who can be assigned to a case or a service order must be associated with an active provider group. Define provider groups using the Provider Group component.

Specifying Holiday Schedules and Workday Information

Access the Schedule page (Workforce, Provider Groups, Schedule).

See [Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," Defining Schedules for Provider Groups, page 202.](#)

Defining Assignment Criteria

Access the Criteria page (Workforce, Provider Groups, Assign Group Criteria).

See [Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," Defining Assignment Criteria, page 204.](#)

Associating Competency Information with the Provider Group

Access the Group Competencies page (Workforce, Provider Groups, Group Competencies).

See [Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," Associating Competencies with Provider Groups, page 207.](#)

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Workers," Defining Job Assignment Criteria

Associating Competency Information with Services and Service Activities

Access the Service Details (Set Up CRM, Product Related, FieldService, Services, Service Details) and Service Activities (Set Up CRM, Product Related, FieldService, Services, Service Activities) pages.

See *PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook*, "Setting Up Services."

See *PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook*, "Setting Up Services," Defining Services.

See *PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook*, "Setting Up Services," Defining Activities.

Associating Competency Information with Problem Types

Access the Problem Type page (Set Up CRM, Product Related, Call Center, Problem Type, Problem Type).

See *PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook*, "Setting Up Call Center Prompt Tables," Setting Up Basic Prompt Tables for Cases.

Associating Competency Information with Categories, Specialty Types, and Details

Access the Category (Set Up CRM, Product Related, Call Center, Category/Type/Detail, Category), Type (Set Up CRM, Product Related, Call Center, Category/Type/Detail, Type), and Detail (Set Up CRM, Product Related, Call Center, Category/Type/Detail, Detail) pages.

See *PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook*, "Setting Up Call Center Prompt Tables," Setting Up Basic Prompt Tables for Cases.

Establishing Weighting Factors for Provider Group Criteria Matches

Access the Group Weighting Factors page (Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Group Weighting Factors).

Group Weighting Factors		Member Weighting Factors		Assignment Setup	
SetID CRM01					
Weight					
Rate each factor from 1 (least) to 5 (most). Select N/A if the factor does not apply.					
	Least Important			Most Important	
Competency - CTD	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Competency - Problem Type	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Competency - Service	<input type="radio"/> 1	<input type="radio"/> 2	<input checked="" type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Customer	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5
Department	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Location	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Person Type	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Product	<input type="radio"/> 1	<input type="radio"/> 2	<input checked="" type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Product Group	<input type="radio"/> 1	<input checked="" type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Region	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input checked="" type="radio"/> 4	<input type="radio"/> 5
Security Role	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5
Site	<input checked="" type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5

Group Weighting Factors page

Select the relative importance of a provider group's assignment criteria matches for competency on CTD (support and help desk cases), problem type (support and help desk cases), service (service orders), customers (service orders and support cases), department (help desk cases), locations (help desk cases), person type (help desk cases), products (all), product groups (all), regions (service orders and support cases), roles (change management only), and sites (service orders and support cases).

See Also

[Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," page 191](#)

Establishing Weighting Factors for Group Member Criteria Matches

Access the Member Weighting Factors page (Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Member Weighting Factors).

Group Weighting Factors Member Weighting Factors Assignment Setup						
SetID CRM01						
Weight						
Rate each factor from 1 (least) to 5 (most). Select N/A if the factor does not apply.						
	Least Important			Most Important		
Competency - CTD	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input checked="" type="radio"/> N / A
Competency - Problem Type	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input checked="" type="radio"/> N / A
Competency - Service	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input checked="" type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> N / A
Customer	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	<input type="radio"/> N / A
Department	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input checked="" type="radio"/> N / A
Location	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input checked="" type="radio"/> N / A
Person Type	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input checked="" type="radio"/> N / A
Product	<input type="radio"/> 1	<input type="radio"/> 2	<input checked="" type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> N / A
Product Group	<input type="radio"/> 1	<input checked="" type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> N / A
Region	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input checked="" type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> N / A
Security Role	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	<input type="radio"/> N / A
Site	<input checked="" type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> N / A

Member Weighting Factors page

Select the relative importance of a of a group member's assignment criteria matches for competency on CTD (support and help desk cases), problem type (support and help desk cases), service (service orders), customers (service orders and support cases), department (help desk cases), locations (help desk cases), person type (help desk cases), products (all), product groups (all), regions (service orders and support cases), roles (change management), and sites (service orders and support cases).

Specifying Assignment Engine Setup

Access the Assignment Setup page (Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Assignment Setup).

Assignment Setup page

Rating Model	Enter the rating model to indicate required proficiency levels for products. Establish rating models on the Competency Rating Model page.
Default Assignment Page	<p>Select the page that the system initially returns when you perform a search. Values are:</p> <p><i>Summary:</i> The system displays the Provider Group Summary page when you perform a provider group search and the Candidate Summary page when you perform a provider group member search for a technician or agent.</p> <p><i>Detail:</i> The system displays the Provider Group Detail page when you perform a provider group search and the Candidate Detail page when you provide a provider group member search for a technician or agent.</p>
Display Provider Groups and Group Members with no Criteria Matches	Select to enable all provider groups and group members to appear as part of the assignment engine search results when you click Suggest a Provider Group or Suggest a Group Member from a case or service order. Clear this check box if only the provider groups and group members that have criteria matches should appear in the search results.

See Also

[Chapter 13, "Managing Workforce Competencies," Defining Competency Rating Models, page 212](#)

Reviewing and Assigning Provider Groups

This section lists common elements and discusses how to:

- Review provider group summary search results and assign provider groups.

- Review provider group detail search results and assign provider groups.

See Also

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Creating and Managing Service Orders," Setting Up Automatic Service Order Assignments

Common Elements Used in This Section

Provider Group Name	Displays the name of the eligible provider group. Click the Transfer to Provider Group button next to the name to access the Provider Group component and view the provider group definition record.
Select	Click to assign the selected provider group to the corresponding service order or case.
Available	Displays the group or group member's availability. A green circle indicates availability; a red square indicates unavailability. <hr/> Note. The Available column does not appear if you do not specify a start or end period on the service order. <hr/>
Score	Displays the provider group's score for the criteria match based on the assignment weight factor that is defined on the Group Weighting Factors page in the Assignment Engine Setup component.
Total Score	Displays the total fit score of the provider group.
Return To Service Order and Return To Case	Click to return to the component (service order or case, respectively), where you access this page.




Pages Used to Review and Assign Provider Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Provider Group Summary	RF_ASSIGN_PG_SEC	<ul style="list-style-type: none"> On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group button. <p>Click the Summary link if the Provider Group Detail page appears.</p> <ul style="list-style-type: none"> On the Case page in PeopleSoft Support or HelpDesk, click the Suggest a Provider Group button. <p>Click the Summary link if the Provider Group Detail page appears.</p> <ul style="list-style-type: none"> On the Dispatch Board page click the Suggest a Provider Group button. On the Change Request Task page, click the Suggest Assignments button. 	Review the provider group search result (summary view) and select a provider group that you can assign to a service order or a case.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Provider Group Detail	RF_ASSIGN_PGDT_SEC	<ul style="list-style-type: none"> On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group button. Click the Detail link if the Provider Group Summary page appears. On the Case page in PeopleSoft Support or HelpDesk, click the Suggest a Provider Group button. Click the Detail link if the Provider Group Summary page appears. On the Change Request Task page, click the Suggest Assignments button. Click the Detail link if the Provider Group Summary page appears. On the Dispatch Board page click the Suggest a Provider Group button. Click the Detail link if the Provider Group Summary page appears. 	Review the provider group search result (detail view). You can select a provider group that you can assign to a service order or a case from here as well.

Reviewing Provider Group Summary Search Results and Assigning Provider Groups

Access the Provider Group Summary page (On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group button. Click the Summary link if the Provider Group Detail page appears).

Service Order		
Provider Group Summary		
Provider Groups		
Score	Provider Group Name	
41.7%	Appliances Eastern 	Select
41.7%	Appliances Western 	Select
33.3%	Change Administrators 	Select

Go to: [Detail](#) [Return to Service Order](#)

Provider Group Summary page

The Provider Group Summary page lists provider groups that matched at least one assignment criteria value on the case or service order.

Detail

Click to access the Provider Group Detail page and view the assignment weight factors that are used to calculate the fit scores.

Reviewing Provider Group Detail Search Results and Assigning Provider Groups

Access the Provider Group Detail page (On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group button. Click the Detail link if the Provider Group Summary page appears).

Service Order					
Provider Group Detail					
Provider Groups					
Score	Total Score	Provider Group Name	Criteria Code	Description	
41.7%	41.7%	Appliances Eastern 	Customer	MMA Property Management Group	Select
41.7%	41.7%	Appliances Western 	Customer	MMA Property Management Group	Select
33.3%	33.3%	Change Administrators 	Region	USA	Select

Go to: [Summary](#) [Return to Service Order](#)

Provider Group Detail page

Summary

Click to access the Provider Group Summary page.

Criteria Code

Displays the assignment criterion on the case or service order that the provider group matched.

Reviewing and Assigning Group Members

This section lists common elements and discusses how to:

- Review group member summary search results and assign group members.
- Review group member detail search results and assign group members.

See Also

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Creating and Managing Service Orders,"
Setting Up Automatic Service Order Assignments

Common Elements Used in This Section

Select	Select this check box to indicate a group member to assign, and then click the Select button. If the assignment is for a service order line, you can select multiple group members.
Name	Displays the name of the eligible group member. Click the Transfer to Worker button to access the Worker component and view the worker definition record.
Cases	Displays the number of cases that are assigned to an agent. This column appears only for worker assignment searches that you perform from a case in PeopleSoft Support or HelpDesk.
Score	Displays the group member's score for each criteria match based on the criteria assignment weight factor for the criteria code that you define on the Member Weighting Factors page in the Assignment Engine Setup component.
Total Score	Displays the total fit score of the group member.
Return To Service Order and Return To Case	Click to return to the service order or case from which you accessed this page.

Pages Used to Review and Assign Group Members

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Candidate Summary	RF_ASSIGN_LIST_SEC	<ul style="list-style-type: none"> On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group Member button. <p>Click the Summary link if the Candidate Detail page appears.</p> <ul style="list-style-type: none"> On the Case page in PeopleSoft Support or HelpDesk, click the Suggest an Agent button. <p>Click the Summary link if the Candidate Detail page appears.</p> <ul style="list-style-type: none"> On the Dispatch Board page, click the Suggest Group Member button. <p>Click the Summary link if the Candidate Detail page appears.</p>	Review the group member search result (summary view) and select group members that you can assign to a service order or a case.

Page Name	Definition Name	Navigation	Usage
Candidate Detail	RF_ASSIGN_DET_SEC	<ul style="list-style-type: none"> On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group Member button. <p>Click the Detail link if the Candidate Summary page appears.</p> <ul style="list-style-type: none"> On the Case page in PeopleSoft Support or HelpDesk, click the Suggest an Agent button. <p>Click the Detail link if the Candidate Summary page appears.</p> <ul style="list-style-type: none"> On the Dispatch Board page, click the Suggest Group Member button. <p>Click the Detail link if the Candidate Summary page appears.</p>	Review the group member search result (detail view). You can select a group member that you can assign to a service order or a case from here as well.

Reviewing Group Member Summary Search Results and Assigning Group Members

Access the Candidate Summary page (On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group Member button. Click the Summary link if the Candidate Detail page appears.).

Service Order

Candidate Summary

Candidates		
Select	Score	Name
<input type="checkbox"/>	50.0%	Alan Bailey
<input type="checkbox"/>	38.9%	Teresa Pine
<input type="checkbox"/>	22.2%	Rider Bookie

Select

Go to: [Detail](#) [Return to Service Order](#)

Candidate Summary page

The Candidate Summary page lists the members in the provider group who matched at least one assignment criteria value on the case or service order, or all provider group members if you select the *Display Provider Groups and Group Members with no Criteria Matches* check box on the Assignment Setup page. For support and help desk cases, the system shows the number of open cases that are currently assigned to each group member on the list.

Note. You must specify a provider group on the case or service order before performing a search on group members.

Detail

Click to access the Candidate Detail page and view the assignment weight factors that are used to calculate the total fit scores.

Reviewing Group Member Detail Search Results and Assigning Group Members

Access the Candidate Detail page (On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group Member button. Click the Detail link if the Candidate Summary page appears.).

Service Order

Candidate Detail

Candidates

Customize

Find

Select	Score	Total Score	Name	Criteria Code	Description
<input type="checkbox"/>	27.8%	50.0%	Alan Bailey	Customer	MMA Property Management Group
	22.2%			Region	USA
<input type="checkbox"/>	27.8%	38.9%	Teresa Pine	Customer	MMA Property Management Group
	11.1%			Product Group	Air Conditioner
<input type="checkbox"/>	22.2%	22.2%	Rider Bookie	Region	USA

Select

Go to: [Summary](#) [Return to Service Order](#)

Candidate Detail page

- Summary

Click to return to the Candidate Summary page.
- Criteria Code

Displays the assignment criterion on the case or service order that the candidate matched. Associate values for each criteria code with workers on the Assign Criteria page in the Worker component.

Chapter 15

Defining Holiday Schedules

This chapter provides an overview of holiday schedules and discusses how to:

- Define holiday schedules.
- Associate provider groups with holiday schedules.
- Associate workers with holiday schedules.
- Update workers' calendars with specified holiday schedules.

Understanding Holiday Schedules

In PeopleSoft Customer Relationship Management (PeopleSoft CRM), you can associate holiday schedules with provider groups and individual workers. You can schedule a process to update worker calendars to reflect holiday information. On calendars, holidays appear as a type of task.

In PeopleSoft Integrated FieldService, the assignment engine indicates on the assignment search result that an eligible provider group or worker is unavailable for assignment if the period that the committed start and end dates defined on a service order coincides with a defined holiday.

Similarly, in PeopleSoft call center applications, the assignment engine indicates that a provider group or worker is unavailable for case assignment if the date on which you perform the assignment search corresponds with a defined holiday. (Regardless of availability, however, you can always manually assign provider groups and workers to a case or service order.)

Important! Workers do not inherit holiday schedules from their provider groups.

Because workers can belong to multiple provider groups, you must define and maintain holiday schedules for workers and provider groups separately. If you want workers to inherit holiday schedules from their provider groups, you must institute a manual process to ensure synchronization of holiday schedules.

Defining Holiday Schedules, Time Frames, and Sales Quota Rollups

To define holiday schedules, time frames and sales quotas, use the Installation (RB_INSTALLATION), Holiday Schedule (HOLIDAY_SCHED_TBL) and Time Frames (RSF_TF) components.

This section discusses how to:

- Define standard workday information.

- Define holidays.
- Define time frames for forecasting, pipeline analysis, planning and portfolio examination.
- Define time frames for sales quota relapse.

Pages Used to Define Holiday Schedules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Calendar Options	RF_INSTALLATION	Set Up CRM, Install, Installation Options, Calendar Options	Define standard workday information. The system uses the start and end times on this page as the start and end times of any holiday that you define. The system displays these times on workers' calendars.
Holiday Schedule	HOLIDAY_SCHED_TBL	Set Up CRM, Common Definitions, Calendars and Schedules, Holiday Schedule, Holiday Schedule	Define holidays.
Timeframes	RSF_TF_MAIN	Set Up CRM, Common Definitions, Calendars and Schedules, Time Frames, Timeframes	Define time frames for forecasting, pipeline analysis, planning and portfolio examination.
Sales Information	RSF_TF	Set Up CRM, Common Definitions, Calendars and Schedules, Time Frames, Sales Information	Define time frames for sales quota rollups.

Defining Standard Workday Information

Access the Calendar Options page (Set Up CRM, Install, Installation Options, Calendar Options).

See [Chapter 3, "Setting Up General Options," Setting Up PeopleSoft Enterprise CRM Application Installation Options, page 27.](#)

Defining Holidays

Access the Holiday Schedule page (Set Up CRM, Common Definitions, Calendars and Schedules, Holiday Schedule, Holiday Schedule).

Holiday Schedule

Holiday Schedule 2001

Schedule Information

*Description

Short Description

Holiday Details			
		Description	
01/01/2001		New Years Day	+ -
01/22/2001		Martin Luther King Jr. Day	+ -
05/28/2001		Memorial Day	+ -
07/04/2001		Independance Day	+ -
09/03/2001		Labor Day	+ -
10/08/2001		Columbus Day	+ -
11/22/2001		Thanksgiving	+ -
12/25/2001		12/25/2001	+ -

Holiday Schedule page

When you add a new date to the list of holidays, enter a description (up to 30 alphanumeric characters). This description appears on the workers' calendars.

Define Time Frames for Forecasting, Pipeline Analysis, Planning, and Portfolio Examination

Access the Timeframes page (Set Up CRM, Common Definitions, Calendars and Schedules, Time Frames, Timeframes)

Timeframes
Sales Information

Time Frame Group

Time Frame Group 2009 BY MONTH
*Description 2009 By Month

Time Frame Periods
Customize Find
First 1-12 of 12 Last

Period Definition
Usage & Status

*Frequency	*Period	Time Frame	*Begin Date	*End Date	*Description	Short Description		
Monthly	JAN	2009 BY MONTH-JAN	01/01/2009	01/31/2009	January 2009	2009-JAN	+	-
Monthly	FEB	2009 BY MONTH-FEB	02/01/2009	02/28/2009	February 2009	2009-FEB	+	-
Monthly	MAR	2009 BY MONTH-MAR	03/01/2009	03/31/2009	March 2009	2009-MAR	+	-
Monthly	APR	2009 BY MONTH-APR	04/01/2009	04/30/2009	April 2009	2009-APR	+	-
Monthly	MAY	2009 BY MONTH-MAY	05/01/2009	05/31/2009	May 2009	2009-MAY	+	-
Monthly	JUN	2009 BY MONTH-JUN	06/01/2009	06/30/2009	June 2009	2009-JUN	+	-
Monthly	JUL	2009 BY MONTH-JUL	07/01/2009	07/31/2009	July 2009	2009-JUL	+	-
Monthly	AUG	2009 BY MONTH-AUG	08/01/2009	08/31/2009	August 2009	2009-AUG	+	-
Monthly	SEP	2009 BY MONTH-SEP	09/01/2009	09/30/2009	September 2009	2009-SEP	+	-
Monthly	OCT	2009 BY MONTH-OCT	10/01/2009	10/31/2009	October 2009	2009-OCT	+	-
Monthly	NOV	2009 BY MONTH-NOV	11/01/2009	11/30/2009	November 2009	2009-NOV	+	-
Monthly	DEC	2009 BY MONTH-DEC	12/01/2009	12/31/2009	December 2009	2009-DEC	+	-

Modified 02/23/2009 4:36PM PST BLEE

Timeframes page

Period Definition Tab

Select the Period Definition tab.

Select the period (for example, annual, daily, monthly quarterly, and so on) for the time frame.

Enter a description of the period (for example, Q1, 2005 FY, and so on). The Time Frame field uses the name that you enter for the time frame and the text that you enter in the Period field to enter a description of the time frame.

Select the begin and end dates and then enter a long and short description for the period.

Usage and Status Tab

Select the Usage and Status tab.

Use the Period Use field to indicate how you plan to use the information generated in the time frame that you are defining. You can select either *All*, *Pipeline Only*, *Forecast and Pipeline*, and *Planning and Portfolio*. Use the Status field to indicate the status of the usage for the time frame.

Define Time Frames for Sales Quota Rollups

Access the Sales Information page (Set Up CRM, Common Definitions, Calendars and Schedules, Time Frames, Sales Information).

Timeframes
Sales Information

Time Frame Group

Time Frame Group 2004 BY QUARTER
*Description 2004 by Quarter

Time Frame Periods

Customize | Find |
1-7 of 7
Last

Period Definition
Usage & Status

*Frequency	*Period	Time Frame	*Begin Date	*End Date	*Description	Short Description		
Annual	2004FY	2004 BY QUARTER-2004FY	01/01/200	12/31/200	2004Fiscal Year			
Quarterly	Q1	2004 BY QUARTER-Q1	01/01/200	03/31/200	2004 Q1			
Quarterly	Q2	2004 BY QUARTER-Q2	04/01/200	06/30/200	2004 Q2			
Quarterly	Q3	2004 BY QUARTER-Q3	07/01/200	09/30/200	2004 Q3			
Quarterly	Q4	2004 BY QUARTER-Q4	10/01/200	12/31/200	2004 Q4			
SemiAnnual	1H2004	2004 BY QUARTER-1H2004	01/01/200	06/30/200	2004 1st Half			
SemiAnnual	2H2004	2004 BY QUARTER-2H2004	07/01/200	12/31/200	2004 2nd Half			

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Sales Information page

After you enter the time frames on the Timeframes page and save it, select the Sales Information tab and enter quota information for the time frame group that is being defined.

Quota Information

Use the fields in this group box to define sales quotas by period definition (for example, annual, biweekly, daily, monthly, and so on). You can also use the Define Detailed Quotas option to define revenue details by business unit, product, product group, industry, region, revenue type, and territory.

Quota Rollup Tab

Select the Quota Rollup tab.

Use the Quota Rollup Period field to select the time period that the period should roll up to for reporting or forecasting reasons.

For example, suppose that you are entering monthly time frames based on a quarterly reporting system, the April, May and June periods should roll up to the 2nd quarter rollup period.

Associating Provider Groups with Holiday Schedules

Specify the appropriate holiday schedule on the Schedule page under Workforce, Provider Groups, Schedule.

The assignment engine checks the holiday schedule and hours of operation that you define for a provider group to determine whether an eligible provider group is available for assignment to a service order or case.

See Also

Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," Defining Schedules for Provider Groups, page 202

Associating Workers with Holiday Schedules

Associate workers with the appropriate holiday schedule on the Job Detail page under Workforce, Worker, Job Detail.

When you select a holiday schedule for a worker, the system updates the worker's calendar to reflect the selected holiday schedule when you save the record. If you don't select a holiday schedule for a worker, no holidays are reflected on the worker's calendar.

Note. If you change a worker's holiday schedule on the Job Detail page, when a user saves the page, 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.

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Workers," Defining Job Assignment Criteria

Updating Workers' Calendars with Specified Holiday Schedules

This section discusses how to update workers' calendars with specified holiday schedules.

Page Used to Update Workers' Calendars with Specified Holiday Schedules

Page Name	Definition Name	Navigation	Usage
Holiday Load	RUN_CNTL_RF1000	Workforce, Load Holidays, Holiday Load	Update workers' calendars with specified holiday schedules.

Updating Workers' Calendars with Specified Holiday Schedules

Access the Holiday Load page (Workforce, Load Holidays, Holiday Load).

Holiday Load

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

Language: English

Load Criteria

☒ One Worker Name

☐ All Workers/One Schedule

☐ All Workers/All Schedules

Holiday Load page

You should maintain one holiday schedule per region or per segment of your workforce and periodically add new dates to each holiday schedule to reflect the next year's official holidays. When you add additional dates to the holiday schedules that you define with the Holiday Schedule page, run the Load Holiday process (RF_HOLIDAY).

For example, you might define next year's holidays in the last quarter of this year. After defining the holiday dates for the coming year, run the Load Holiday process to have the system record the new dates on workers' calendars.

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 you delete a holiday for a date prior to the current date, the system does not delete the past holiday from the calendars. However, if you delete or add a holiday for a future date, the system updates calendars to reflect the holiday schedule changes.

Load Criteria

The Load Criteria group box indicates the parameters for the Holiday Load process. Before running the process, you must associate a holiday schedule with each worker who needs the update on the Job Detail page.

One Worker	Select to load the holiday schedule for the worker who you specify in the Name field. The system displays the Name field after you select this option.
All Workers/One Schedule	Select to load the holiday schedule that you specify in the Holiday Schedule field for all workers who are currently defined in the system and have the specified holiday schedule. The system displays the Holiday Schedule field after you select this option.
All Workers/All Schedules	Select to load all holiday schedules that are associated with each worker in the system.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler

Chapter 16

Using Calendars

This section provides an overview of calendars and discusses how to:

- Set up calendars.
- Integrate calendars with third-party applications.

Understanding Calendars

In PeopleSoft Customer Relationship Management (PeopleSoft CRM) every worker has access to their own My Calendar page to view their monthly, weekly, or daily calendars. Managers can update calendars to reflect daily tasks. In PeopleSoft Sales, system events can automatically update sales representatives' calendars to reflect leads and opportunities.

Similarly, in PeopleSoft Integrated FieldService, system events can automatically update technicians' calendars to reflect service order assignments. When suggesting eligible candidates to assign to a service order and case, the system checks for worker availability. If a worker has another task scheduled, or if the start and end times of the task are not within the worker's scheduled work hours, the system indicates that the worker is unavailable.

Calendars and Tasks

The calendar is another way to view tasks. To appear in the calendar, a task must satisfy these conditions:

- The Show In Calendar check box must be selected when the task type is defined.
- The task must have a start date, start time, end date and end time.
- A task appears in the calendar of assignees or invitees only if the person accepts the task or invitation.

Note. If a calendar item is linked to a transaction (for example, company, lead, opportunity or partner) the system displays the appropriate page for that transaction when the user clicks the link for the task subject. If the task is not linked to a transaction, the system displays the Task Details page. Also, if a task spans multiple days, the system displays the task only on the start date on the calendar page.

See Also

[Chapter 14, "Setting Up and Performing Assignment Searches," page 217](#)

PeopleSoft Enterprise Sales 9.1 PeopleBook, "Working with Territories and Assignment Groups"

[Chapter 23, "Working with Tasks," page 417](#)

Setting Up Calendars

This section discusses how to:

- View daily calendars.
- View weekly calendars.
- View monthly calendars.

Common Elements Used in this Section

Daily	Click this toolbar button to go to the daily calendar page.
Weekly	Click this toolbar button to go to the weekly calendar page.
Monthly	Click this toolbar button to go to the monthly calendar page.
View Another's Calendar	Click this link to go to the Another's Calendar search page to view calendars of other workers. Depending on how you implement security, a worker may not be able to view the calendars of other workers. It is more typical for managers to use this link to view the calendars of the people that report to them.
View My Team's Calendar	Click this link to view the calendar for your sales team.
View Provider Group's Calendar	Click this link to view the calendar for any provider group to which you belong. Only tasks that are associated to the provider group (not just owned by an individual provider group member) will be displayed on the calendar. This will only be displayed if the current user is a member of one or more provider groups.
Add Task	Click this toolbar button to access the Task Details page and add task entries. For specific information on adding task entries refer to the section on Managing Tasks. See Chapter 23, "Working with Tasks," Managing Tasks, page 429.

Calendar Item Entry

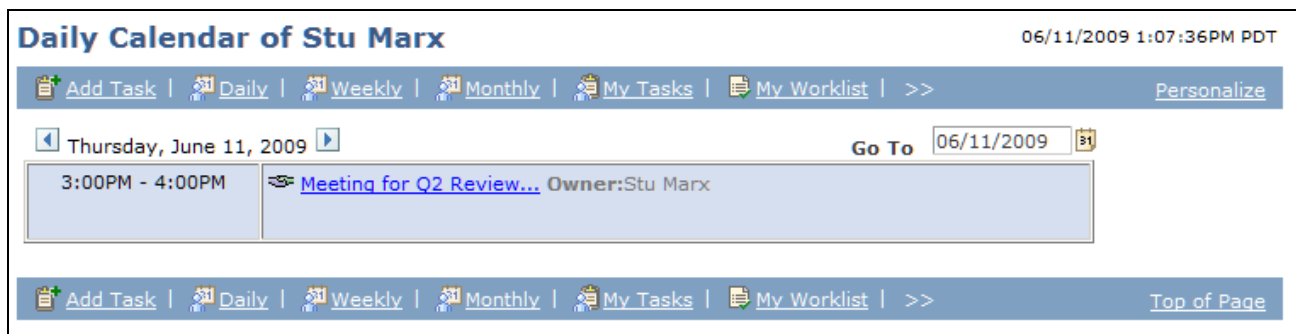
Click this link to go to the page that displays the calendar item. This could be a service order, case, lead, opportunity, or the Task Details page where a user can view and change meeting times, appointments, scheduled phone calls, reminders, and to do items.

Pages Used to Set Up Calendars

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Daily Calendar	RB_TSK_CALENDAR	<ul style="list-style-type: none"> Click the Daily Calendar button next to the worker's name on the dispatch board in PeopleSoft FieldService. Click the gray bar that represents a task for a worker on the dispatch board in PeopleSoft FieldService. Click a day on the Monthly Calendar or Weekly Calendar page. 	View a worker's daily calendar.
Weekly Calendar	RB_TSK_CALENDAR	Click the Weekly Calendar toolbar button on the Daily Calendar or Monthly Calendar page.	View a worker's weekly calendar.
Monthly Calendar	RB_TSK_CALENDAR	Click Monthly Calendar toolbar button on the Daily Calendar or Weekly Calendar page.	View a worker's monthly calendar.
My Tasks - User Options	RB_TSK_PREF_SEC	<p>My Tasks</p> <p>Click the Options button on the toolbar in the My Tasks component.</p>	<p>Set the default calendar view (daily, weekly, or monthly) and delegate tasks to others for a period of time.</p> <p>See Link to Task Management chapter - Setting Task Defaults</p>

Viewing Daily Calendars

Access the Daily Calendar page (click on My Tasks or click on the Daily Calendar button next to the worker's name on the dispatch board in PeopleSoft FieldService).



Daily Calendar page

Go To

Displays the date for the events appearing on the calendar. To view different days, enter a new date, select a new date using the Choose a date button or use the Next Day and Previous Day arrows.



Click the Choose a date button to access the Daily Calendar page for another date.

Daily, Weekly, or Monthly

Click any one of these buttons to get a different view of the currently displayed calendar.

View My Calendar, View Another's Calendar, View My Team's Calendar, View Provider Group's Calendar

Click any of these links to view the specified calendar.

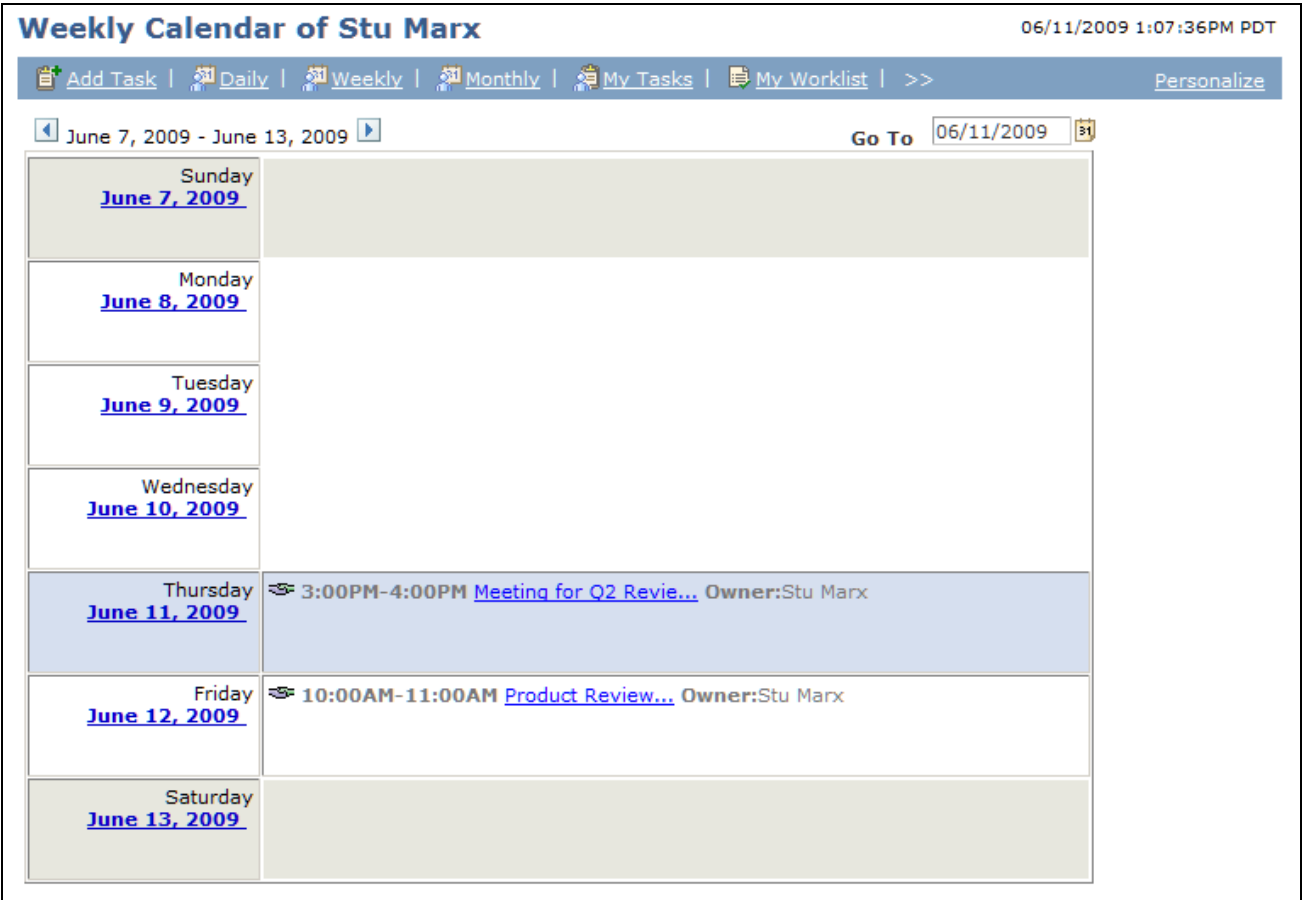
See Also

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Creating and Managing Service Orders"

PeopleSoft Enterprise Sales 9.1 PeopleBook, "Setting Up Sales Security and Personalization"

Viewing Weekly Calendars

Access the Weekly Calendar page (click Weekly Calendar toolbar button on the Daily Calendar or Monthly Calendar page).



Weekly Calendar page

Go To

Displays the current date. To display a new calendar enter a new date, select a new date using the Choose a date button or use the Next Week and Previous Week arrows.

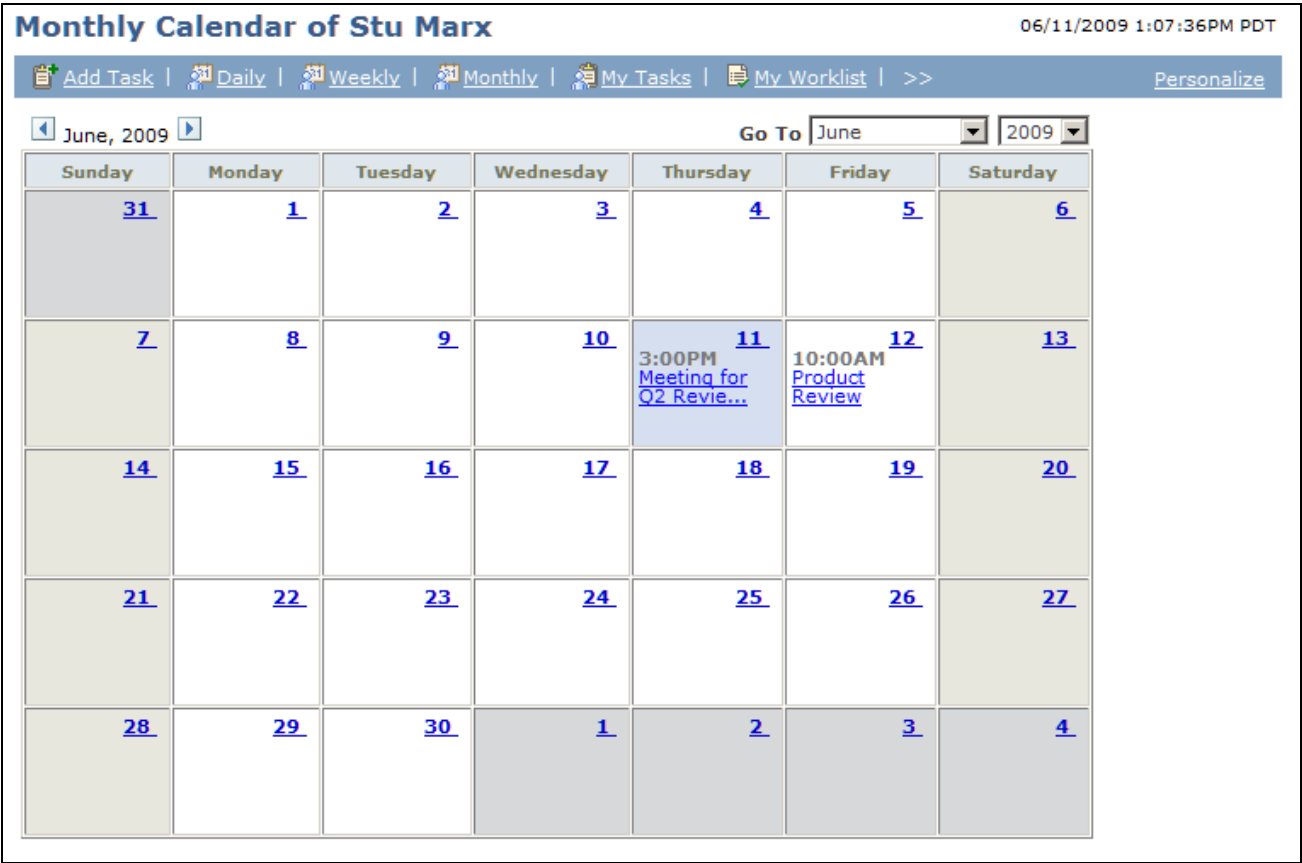
Click the Choose a date button to access the calendar page for another date.

Note.

You can also click the link under the day of the week to go to the worker's daily calendar for that day.

Viewing Monthly Calendars

Access the Monthly Calendar page (click Monthly Calendar toolbar button on the Daily Calendar or Weekly Calendar page).



Monthly Calendar page

Go To

Displays the month and year for the events appearing on the calendar. Select a new month and year to go to a different calendar for the worker. To access a calendar for a different month, click the Next Month and Previous Month arrows.

Note. You can also click the link under the day of the week to access the worker's daily calendar for that day.

Current Month

Click to return to the calendar for the current month after navigating to other months or years. The system highlights the current day and displays nonwork days in light gray. This link only appears if you are not in the current month.

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Workers"

Viewing Team Calendars

This section provides an overview on team calendars and discusses how to:

- View daily team calendars.
- View weekly team calendars.
- View monthly team calendars.
- View other people's calendars.

Understanding Team Calendars

Using team calendars, sales managers can view the calendar of their resources to evaluate their team's bandwidth to work on new leads and opportunities.

Having the functionality to view their team's calendar on a single page enables sales managers to more easily identify the specific meetings, conference calls, events and appointments that they might want to attend, which have been set up by their team members.

Pages Used to View Team Calendars

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Daily Team Calendar	RB_TSK_CALENDAR	<ul style="list-style-type: none"> • Click the My Calendar link. • Click the View My Team Calendars link 	View the calendars of your team for a single day.
Weekly Team Calendar	RB_TSK_CALENDAR	Click the Weekly toolbar button on the Daily Team Calendar or Monthly Team Calendar page.	View the calendars of your team for a single week.
Monthly Team Calendar	RB_TSK_CALENDAR	Click the Monthly toolbar button on the Daily Team Calendar or Weekly Team Calendar page.	View the calendars of your team for a single month.
Another's Calendar	RB_TSK_GCAL_SRCH	Click the View Another's Calendar link on the Daily Team Calendar, Weekly Team Calendar, or Monthly Team Calendar page.	Search for and view other people's calendars.

Viewing Daily Team Calendars

Access the Daily Team Calendar page (click the My Calendar link to get to the My Calendar page, then click the View My Team's Calendar link).

Daily Team Calendar of Steve Moss 06/11/2009 1:58:23PM PDT

[Add Task](#) | [Daily](#) | [Weekly](#) | [Monthly](#) | [My Tasks](#) | [My Worklist](#) | [Personalize](#)

[View My Calendar](#) [View Another's Calendar](#) [View My Team's Calendar](#)

Thursday, June 11, 2009 **Go To** 06/11/2009

2:00PM - 3:00PM [Quarterly Team Mtg...](#) Owner: Steve Moss

[View My Calendar](#) [View Another's Calendar](#) [View My Team's Calendar](#)

[Add Task](#) | [Daily](#) | [Weekly](#) | [Monthly](#) | [My Tasks](#) | [My Worklist](#) | [Top of Page](#)

Daily Team Calendar page

See Also

[Chapter 16, "Using Calendars," Viewing Daily Calendars, page 257](#)

Viewing Weekly Team Calendars

Access the Weekly Team Calendar page (click the Weekly link on the Daily Team Calendar or Monthly Team Calendar page).

Weekly Team Calendar of Steve Moss 06/11/2009 2:01:51PM PDT

[Add Task](#) |
 [Daily](#) |
 [Weekly](#) |
 [Monthly](#) |
 [My Tasks](#) |
 [My Worklist](#) |
 >>
 [Personalize](#)

[View My Calendar](#)
[View Another's Calendar](#)
[View My Team's Calendar](#)

June 7, 2009 - June 13, 2009
 Go To 06/11/2009

Sunday June 7, 2009	
Monday June 8, 2009	
Tuesday June 9, 2009	
Wednesday June 10, 2009	
Thursday June 11, 2009	2:00PM-3:00PM Quarterly Team Mtg... Owner:Steve Moss
Friday June 12, 2009	10:00AM-11:00AM Pipeline Review... Owner:Steve Moss
Saturday June 13, 2009	

[View My Calendar](#)
[View Another's Calendar](#)
[View My Team's Calendar](#)

[Add Task](#) |
 [Daily](#) |
 [Weekly](#) |
 [Monthly](#) |
 [My Tasks](#) |
 [My Worklist](#) |
 >>
 [Top of Page](#)

Weekly Team Calendar page

See Also

[Chapter 16, "Using Calendars," Viewing Weekly Calendars, page 258](#)

Viewing Monthly Team Calendars

Access the Monthly Team Calendar page (click the Monthly link on the Daily Team Calendar or Weekly Team Calendar page).

Monthly Team Calendar of Steve Moss

06/11/2009 2:01:51PM PDT

Add Task

Daily

Weekly

Monthly

My Tasks

My Worklist

>>

Personalize

[View My Calendar](#)

[View Another's Calendar](#)

[View My Team's Calendar](#)

June, 2009

Go To

June

2009

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31	1	2	3	4	5	6
7	8	9	10	11 2:00PM Quarterly Team Mtg OfSteve Moss	12 10:00AM Pipeline Review OfSteve Moss	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4

[View My Calendar](#)

[View Another's Calendar](#)

[View My Team's Calendar](#)

Add Task

Daily

Weekly

Monthly

My Tasks

My Worklist

>>

Top of Page

Monthly Team Calendar page

See Also

[Chapter 16, "Using Calendars," Viewing Monthly Calendars, page 259](#)

Viewing Other Peoples' Calendars

Access the Another's Calendar page (click the View Another's Calendar link on the Daily Team Calendar, Weekly Team Calendar, or Monthly Team Calendar page).

Another's Calendar for Steve Moss




Use Search Criteria to Narrow the Search Results

Select the Person's Calendar to View	
Name	Department
Alan Bailey	Sales and Services
Rider Bookie	Sales and Services
Alice Teirney	Sales and Services
Frank Peterson	Sales and Services
Steve Moss	United States Operations

[My Calendar](#)

▼ Search




Use Saved Search

[Basic Search](#)
 [Save Search Criteria](#)
 Delete Saved Search
  [Personalize Search](#)

Person ID
 First Name
 Last Name
 Name
 DeptID
 Department

▼ Show in Results

☒ Person as Sales Manager

[Basic Search](#)
 [Save Search Criteria](#)
 Delete Saved Search
  [Personalize Search](#)

Another's Calendar page

Enter your search criteria in the fields within the Search group box and then click the search button at the bottom of the page. The system displays a list of names and their departments. Click the person's name whose calendar you want to view. The system takes you to that person's Daily Calendar page.

Viewing Provider Group Calendars

This section provides an overview on provider group calendars and discusses how to:

- View daily provider group calendars.
- View weekly provider group calendars.
- View monthly provider group calendars.

Understanding Provider Group Calendars

By using provider group calendars, members of a provider group can view the tasks and calendar for their group. The only tasks listed on the calendar are those that are assigned to the provider group (and whose task types are configured to display on the calendar).

See [Chapter 23, "Working with Tasks,"](#) page 417.

Pages Used to View Provider Group Calendars

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Daily Provider Group Calendar	RB_TSK_CALENDAR	<ul style="list-style-type: none"> Click the My Calendar link. Click the View Provider Group's Calendar link 	View the calendars of your provider group for a single day.
Weekly Provider Group Calendar	RB_TSK_CALENDAR	Click the Weekly toolbar button on the Daily Provider Group Calendar or Monthly Provider Group's Calendar page.	View the calendars of your provider group for a single week.
Monthly Provider Group Calendar	RB_TSK_CALENDAR	Click the Monthly toolbar button on the Daily Provider Group Calendar or Weekly Provider Group's Calendar page.	View the calendars of your provider group for a single month.

Viewing Daily Provider Group Calendar

Access the Daily Provider Group Calendar page (click the View Provider Group's Calendar link from the My Calendar page).

Daily Provider Group Calendar of Appliances Western 06/11/2009 4:06:42PM PDT

[Add Task](#) | [Daily](#) | [Weekly](#) | [Monthly](#) | [My Tasks](#) | [My Worklist](#) | [Personalize](#)

[View My Calendar](#) [View Another's Calendar](#) [View Provider Group's Calendar](#)

Thursday, June 11, 2009 **Go To** 06/11/2009

2:00PM - 3:00PM [Quarterly Team Mtg...](#) Owner:

[View My Calendar](#) [View Another's Calendar](#) [View Provider Group's Calendar](#)

[Add Task](#) | [Daily](#) | [Weekly](#) | [Monthly](#) | [My Tasks](#) | [My Worklist](#) | [Top of Page](#)

Daily Provider Group Calendar page

See Also

Chapter 16, "Using Calendars," Viewing Daily Calendars, page 257

Viewing Weekly Provider Group Calendars

Access the Weekly Provider Group Calendar page (click the Weekly toolbar button on the Daily Provider Group Calendar or Monthly Provider Group Calendar page).

Weekly Provider Group Calendar of Appliances Western06/11/2009 4:06:42PM PDT

Add Task | Daily | Weekly | Monthly | My Tasks | My Worklist | >>Personalize

[View My Calendar](#) [View Another's Calendar](#) [View Provider Group's Calendar](#)

June 7, 2009 - June 13, 2009Go To06/11/200931

Sunday June 7, 2009	
Monday June 8, 2009	
Tuesday June 9, 2009	2:00PM-3:00PM Site visit for Peter... Owner:
Wednesday June 10, 2009	
Thursday June 11, 2009	2:00PM-3:00PM Quarterly Team Mtg... Owner:
Friday June 12, 2009	4:00PM-5:00PM Review 3rd Quarter P... Owner:
Saturday June 13, 2009	

[View My Calendar](#) [View Another's Calendar](#) [View Provider Group's Calendar](#)

Add Task | Daily | Weekly | Monthly | My Tasks | My Worklist | >>Top of Page

Weekly Provider Group Calendar page

See Also

Chapter 16, "Using Calendars," Viewing Weekly Calendars, page 258

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Viewing Monthly Provider Group Calendars

Access the Monthly Provider Group Calendar page (click the Monthly toolbar button on the Daily Provider Group Calendar or Weekly Provider Group Calendar page).

Monthly Provider Group Calendar of Appliances Western
06/11/2009 4:06:42PM PDT

Add Task | Daily | Weekly | Monthly | My Tasks | My Worklist | >>
Personalize

[View My Calendar](#)
[View Another's Calendar](#)
[View Provider Group's Calendar](#)

June, 2009
Go To
June
2009

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31	1	2	3	4	5	6
7	8	9 2:00PM Site visit for Peter...	10	11 2:00PM Quarterly Team Mtg	12 4:00PM Review 3rd Quarter P...	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4

[View My Calendar](#)
[View Another's Calendar](#)
[View Provider Group's Calendar](#)

Add Task | Daily | Weekly | Monthly | My Tasks | My Worklist | >>
Top of Page

Monthly Provider Group Calendar page

See Also

[Chapter 16, "Using Calendars," Viewing Monthly Calendars, page 259](#)

Integrating Calendars with Third-Party Applications

PeopleSoft CRM delivers two enterprise integration points (EIPs)—Calendar/Task and Task Type—to integrate the calendar functionality with third-party voice recognition applications.

Part 4

Interactions and 360-Degree Views

Chapter 17

Working with Interactions

Chapter 18

Setting Up the 360-Degree View

Chapter 19

Using the 360-Degree View

Chapter 17

Working with Interactions

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

- Set up interaction status.
- View interactions.

Understanding Interactions

This section discusses:

- Interactions and subinteractions.
- Contact methods and status.
- Interaction creation.
- Interaction display.
- Interaction notes.

Interactions and Subinteractions

Interactions are communications between you and customers or workers. At the practical level, an interaction is, essentially, a call. Tracking such communications provides valuable insight into customer- and worker-related activities.

Subinteractions are interactions that relate to a specific PeopleSoft CRM transaction (or call type), such as a lead, order, or case. In essence, subinteractions are the activities that occur during a call. Notes that are associated with an interaction are also subinteractions. A single interaction can have zero, one, or many subinteractions.

Note. Interactions are not created for partner communications except from the 360-Degree View page. Subinteractions are never created for partner communications.

External Customers Versus Workers

You create different types of subinteractions depending on whether an interaction is for an external customer or a worker. In most CRM applications, customers are external to an organization. Any person or organization whose data that you manage in one of the customer or partner components (Company, Partner Company, Person, or Site) is considered an external customer. However, in PeopleSoft HelpDesk and HelpDesk for Human Resources, customers are internal people whose data you manage in the Worker component.

The Worker component enables you to manage data for help desk internal customers and for CRM staff users such as salespeople, call center agents, and field service technicians. A worker can function as either a customer or as CRM staff; therefore, the creation of a worker interaction is context-dependent. Worker interactions are created only from the context of a help desk case, a human resources help desk case, or on the Worker 360-Degree View page.

For example, if you open a helpdesk case for Mark Anderson, any correspondence that you send to Mark from that case is logged as an interaction, and the case itself becomes a subinteraction. If Mark is also a customer service representative, he might receive notifications that are related to cases for other callers. These notifications are not logged as interactions because, in this context, Mark is a contact, not a customer.

Subinteraction Types

You can create the following basic PeopleSoft CRM transactions as subinteractions of external customer interactions:

- PeopleSoft Enterprise Support cases.
- PeopleSoft Enterprise Sales leads.
- PeopleSoft Enterprise Sales opportunities.
- All types of PeopleSoft Enterprise Order Capture (collectively known as *order captures*).
- Installed products.
- PeopleSoft Enterprise FieldService service orders.
- Notes.

You can create the following PeopleSoft CRM transactions as subinteractions of worker interactions:

- PeopleSoft Enterprise HelpDesk cases.
- PeopleSoft Enterprise HelpDesk for Human Resources cases.
- Notes.

Note. Additional types of subinteractions are available in PeopleSoft CRM industry-specific applications.

Contact Methods and Status

Every interaction has an associated contact method. An interaction's contact method categorizes the interaction. It indicates the direction (inbound or outbound) of the interaction and the communication channel. Inbound interactions occur when a customer initiates the contact; outbound interactions occur when you initiate the contact. Outbound interactions can be manual (for example, when a salesperson sends correspondence to a customer) or automatic (for example, when workflow notifies a customer that a case is closed).

Many communication channels are used for both inbound and outbound communications. For example, phone, email, and paper correspondence (whether mailed or faxed) can originate internally or externally. However, the customer always initiates web-based interactions. Therefore, the Inbound Chat and Inbound Web (for web self-service) contact methods do not have any outbound counterparts.

The Interaction Detail page contains the contents of the interaction (the text of the email, correspondence, or chat), and the interaction detail type identifies that detail type. For example, the phone interaction detail type is just one type, whereas the contact methods include Phone In and Phone Out. Contact methods include both the channel and the direction of the interaction (in or out), while the interaction detail type is used mainly to control different sets of interaction statuses. There are different sets of interaction statuses for different channels and directions.

Contact Method (INTERACTION_MTHD) and Interaction Detail Type (RB_MCF_DETAIL_TYPE) are translate fields.

Interaction Status

Every interaction has a status, which varies depending on the contact method. This table shows the system delivered statuses for each contact method:

Contact Method	Statuses
Inbound Chat	<i>Accepted, Completed and Requested.</i> See <i>PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook</i> , "Working with Multichannel Applications."
Inbound Email	<i>Assigned, Canceled, Completed, Processing, New, and Reassigned.</i> See <i>PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook</i> , "Managing Email."
Inbound Fax/Outbound Fax	None specified.
Inbound Phone/Outbound Phone	<i>Busy, Callback, Child Answered, Completed, In Progress, No Answer, and Do Not Call Again.</i> See Chapter 19, "Using the 360-Degree View," page 335 .

Contact Method	Statuses
<p>Outbound Email/Outbound Worklist Notification</p> <p>Outbound Email includes email replies, manual notification (sent as email), and email that is sent through a correspondence request.</p> <p>Outbound Worklist Notification refers to manual notifications that are sent as worklist entries.</p>	<p><i>Completed, Cancelled, Failed In Delivery, and In Progress.</i></p> <p>See <i>PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook</i>, "Managing Email."</p>
Outbound Print/Printer	<i>Completed, Cancelled, Failed In Delivery, and In Progress.</i>
Outbound SMS	<i>Completed, Cancelled, Failed In Delivery, and In Progress.</i>
Synchronized Email	<i>Completed.</i>
Self-Service/Inbound Web	<p><i>Completed.</i></p> <p>See Chapter 21, "Working with Customer Self-Service Transactions," page 363.</p>

An interaction's initial status depends on how the interaction is created. You can manually update statuses for interactions that you create using the 360-Degree View feature, but the system maintains statuses for other types of interactions.

Interaction Creation

You can create interactions manually, or the system can create them automatically. This table lists the situations in which the system creates interactions:

Condition	Subinteraction	Contact Method and Status Management
A user accesses a customer, partner, or worker 360-Degree View.	Created based on the user's actions in the 360-Degree View.	In the 360-Degree View, the user can see the contact method and can change it manually. The multichannel framework type is not user-selectable. In the 360-Degree View, the multichannel framework type is always <i>Phone</i> .

Condition	Subinteraction	Contact Method and Status Management
<p>The PeopleSoft CRM Computer Telephony Interface (CTI) application uses a delivered CTI transaction to access a page in PeopleSoft CRM.</p> <p>Note. CTI transactions that you create do not automatically create interactions or subinteractions.</p>	<p>Created by the system if the transaction's target page is a subinteraction-enabled object.</p>	<p>Contact method: Phone</p> <p>Status default: <i>In Progress</i></p>
<p>A user sends email or print correspondence using the PeopleSoft CRM correspondence management features.</p>	<p>Created for the object from which the correspondence was sent.</p>	<p>Contact method: Outbound mail</p> <p>Status default: <i>In Progress</i></p>
<ul style="list-style-type: none"> • A user sends manual notifications as email to internal (for example, workers) and external recipients (for example, customer contacts and consumers), or as worklist entries to internal recipients. • A user replies to an inbound email using Email Workspace (available if you license the PeopleSoft email response management system [ERMS]). 	<p>Interactions are created for the notifications. A subinteraction is created for the transaction with which each outbound email or worklist notification is associated.</p>	<p>Contact method: Outbound email</p> <p>Status default: <i>In Progress</i></p>

Condition	Subinteraction	Contact Method and Status Management
The PeopleSoft ERMS processes an inbound email.	<p>The system creates an interaction for the inbound email.</p> <p>A subinteraction is created when a user manually associates related objects to the inbound email. If a newly received email is part of a thread, it automatically inherits its parent email's related objects and subinteractions.</p>	<p>Contact method: Inbound email</p> <p>Status default: <i>New</i></p>
<p>The system sends an automated email to a customer, partner, or worker from the context of a help desk case to a worker.</p> <p>Automated email is sent by AAF workflow, by business project workflow, or by the ERMS system autoresponse process to structured email.</p> <p>Note. Auto - acknowledgement email sent by the ERMS system or in response to a customer's Contact Us submission does not create an interaction.</p>	<p>Interactions are created for AAF workflow notifications but not for business project workflow notifications.</p> <p>No subinteractions are created.</p> <p>A subinteraction is created by the ERMS autoresponse process if the subinteraction is associated with transactions.</p>	<p>Contact method: Outbound email</p> <p>Status default: <i>In Progress</i></p>
<p>A self-service customer or partner submits a Contact Us message.</p> <p>The Contact Us page is available only to external customers or partners, not to workers.</p>	The text of the message becomes the interaction note.	<p>Contact method: Phone</p> <p>Status default: <i>In Progress</i></p>
A customer or partner requests a chat session from the self-service Contact Us page.	None.	<p>Contact method: Chat</p> <p>Status: <i>Requested</i></p>

Condition	Subinteraction	Contact Method and Status Management
A self-service user creates a new case or updates an existing case in PeopleSoft Enterprise Support, HelpDesk, or HelpDesk for Human Resources.	The case that was created or updated.	Contact method: Phone Status default: <i>In Progress</i>

To record communications that occur outside of the PeopleSoft CRM system, users can manually create interactions using the appropriate 360-Degree View. Users might manually create interactions if:

- A phone call is placed or received without the use of the CTI system.
- A letter or fax is received.
- Email is sent from outside of the PeopleSoft CRM system.
- Email is received by a mailbox that the ERMS system is not monitoring.

Interaction Display

There are various interfaces for viewing interaction information.

Interactions in the 360-Degree View Pages

PeopleSoft CRM provides 360-Degree View pages for customers, partners, and workers. There are two separate 360-Degree View pages for workers: one for PeopleSoft HelpDesk and one for HelpDesk for Human Resources. As delivered, all of the 360-Degree View pages are configured to show interactions in the dynamic grid that you create for it. You can configure a dynamic grid to display all of that interaction's subinteractions when it is expanded.

The 360-Degree View page for a customer shows all of the interactions for that customer. The Partner 360-Degree View page shows all of the interactions for the partner.

Other Interaction Lists

In addition to the 360-Degree View pages, you can view lists of interactions using:

- Interaction history grids within transactional components.

The components that you use to manage subinteraction-enabled components (including Cases, Leads, and Orders) include a grid that shows all interactions for the specific transaction.

- The Interaction List page.

This page enables you to search for and access interactions directly from a menu (rather than from the context of a specific customer or transaction).

- The Recent Interactions pagelet.

This pagelet displays recent interactions for a selected customer. The Recent Interactions pagelet is available with PeopleSoft CRM Portal Pack.

Interaction Details

From any interaction list, you can drill into the Interaction page, where you can see the details of a specific interaction. The page that appears depends on the interaction type:

- If the interaction was created on the 360-Degree View page, the details appear on the Interaction Detail page.
- If a correspondence request created the interaction, the details appear on the Interactions - View Correspondence page.
- If the interaction is an inbound email or outbound notification (that is, a worklist entry or email other than email sent through a correspondence request), drilling into the interaction displays the details on the Email Workspace component (for inbound email) or the Outbound Notification page (for outbound notification).
- If the interaction is a chat session, the detail page shows the full chat transcript.

See Also

PeopleSoft Enterprise CRM Portal Pack 9.1 PeopleBook, "Getting Started with PeopleSoft Enterprise CRM Portal Pack"

[Chapter 19, "Using the 360-Degree View," page 335](#)

Modifying Interaction Status

This section discusses how to modify interaction status descriptions.

Page Used to Set Up Interaction Status

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Interaction Status	RI_STATUS_SETUP	Set Up CRM, Common Definitions, Correspondence, Interaction Status Setup, Interaction Status	Modify interaction status descriptions.

Modifying Interaction Status Descriptions

Access the Interaction Status page (Set Up CRM, Common Definitions, Correspondence, Interaction Status Setup, Interaction Status).

Interaction Status

Interaction Detail Type Outbound Email

Interaction Status		
Status Code	Status Description	Datetime Added
CMPL	Completed	08/11/2002 3:53AM
CNCL	Cancelled	08/11/2002 3:53AM
FAIL	Failed in delivery	08/12/2002 11:51AM
IP	In Progress	08/11/2002 3:53AM

[Customize](#) | [Find](#) | | [First](#) | [1-4 of 4](#) | [Last](#)

[Modify System Data](#)

This object is maintained by PeopleSoft.

Interaction Status page

Warning! If you change interaction statuses, you must make appropriate code changes in PeopleSoft Application Designer.

Status Code Displays the statuses that PeopleSoft CRM delivers for the interaction detail type.

Viewing Interactions

This section discusses how to:

- Search for interactions.
- View interaction details.
- View interaction correspondence details.

Pages Used to View Interactions









Page Name	Definition Name	Navigation	Usage
Interaction List	RI_INTERACT_HOME	Customers CRM, Interaction List, Interaction List	Search for interactions.

Page Name	Definition Name	Navigation	Usage
Interaction	RI_INTERACTION	<ul style="list-style-type: none"> Click the link for an interaction that has no associated contact method on the Interaction List page. Click the link for an interaction that has no associated contact method on any 360-Degree View page. Click the link for an interaction that has no associated contact method on the Recent Interactions pagelet. 	View interaction details, including a list of related subinteractions and the complete text of any interaction note.
Interactions - View Correspondence	RBC_RECPIENT_INQ	<ul style="list-style-type: none"> Click the link for an interaction that represents correspondence on the Interaction List page. Click the link for an interaction that represents correspondence on any 360-Degree View page. Click the link for an interaction that represents correspondence on the Recent Interactions pagelet. 	View interaction details for the correspondence request.
Inbound Email	RB_EM_IB	<ul style="list-style-type: none"> Click the link for an interaction that represents inbound email on the Interaction List page. Click the link for an interaction that represents inbound email on any 360-Degree View page. Click the link for an interaction that represents inbound email on the Recent Interactions pagelet. 	View interaction details of inbound email.

Page Name	Definition Name	Navigation	Usage
Outbound Email	RB_EM_OB	<ul style="list-style-type: none"> Click the link for an interaction that represents outbound email on the Interaction List page. Click the link for an interaction that represents outbound email on any 360-Degree View page. Click the link for an interaction that represents outbound email on the Recent Interactions pagelet. 	View interaction details of inbound email.
Chat	RB_CHAT_LOG	<ul style="list-style-type: none"> Click the link for an interaction that represents chat on the Interaction List page. Click the link for an interaction that represents chat on any 360-Degree View page. Click the link for an interaction that represents chat on the Recent Interactions pagelet. 	View interaction details of a chat.

Searching for Interactions

Access the Interaction List page (Customers CRM, Interaction List, Interaction List).

Interaction List						
Search						
Business Unit = APP01 AND End Date & Time <= 10/24/2002 9:07:00PM						
Interactions						
	Name	Type	Contact Method	Interaction Status	Start Date & Time	Comments
	Steve Collins	Order	Outbound Email	In Progress	10/04/2002 10:34AM	Multi-Channel Related Transaction (Order ID: 3b6eb126d7bf11d681f3)
	Gavin Brent	Order	Outbound Email	In Progress	10/04/2002 4:27PM	Multi-Channel Related Transaction (Order ID: CRQ0300044)
	Gavin Brent	Order	Outbound Email	In Progress	10/04/2002 4:35PM	Multi-Channel Related Transaction (Order ID: OC00617)
	Gavin Brent	Order	Outbound Email	In Progress	10/04/2002 4:38PM	Multi-Channel Related Transaction (Order ID: OC00618)
	Gary Smart	Order	Outbound Email	In Progress	10/07/2002 4:06PM	Multi-Channel Related Transaction (Order ID: CRQ0300053)
	Kaley Parker	Order	Outbound Email	In Progress	10/07/2002 4:51PM	Multi-Channel Related Transaction (Order ID: CRQ0300055)
	Jack Pepper	Case		Completed	10/24/2002 9:05PM	Viewed/Updated Case No. 220334
	Jack Pepper	Case		Completed	10/24/2002 9:06PM	Viewed/Updated Case No. 220334

Interaction List page

Search

Use this page region to define search criteria and perform searches. You can control the appearance and behavior of the interaction search by using the PeopleSoft CRM search configuration utility.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Search Pages."

As delivered, the system searches for all interactions when you first access the page. You cannot use this page to add interactions or edit interaction data.

The search criteria fields and the search results fields are the same as the identically-named fields on the interaction detail pages. Not all fields apply to all types of interactions. For example, only interactions that are created from a 360-Degree View page have a value in the Call Back date field.

Type

Select a subinteraction type. The search locates interactions that have the type of subinteraction that you select. Available values depend on which PeopleSoft CRM products you have licensed.

Interactions

This section displays search results and lists all subinteractions (shown in the Type column), along with their interactions.



Click the Edit This Interaction button to access the Interaction page and view detailed information about the interaction. A different interaction detail page appears for each type of interaction.

Type

Displays links to associated subinteractions. An interaction can have more than one link. The link text is the subinteraction type—for example, *Case* or *Order*.

Viewing Interaction Details

Access the Interaction page (click the link for an interaction that has no associated contact method on the Interaction List page).

Interaction

Customer Information

Contact Jack Pepper

Customer Shoreview Medical

Interaction Information

Contact Method

Interaction Status

Start Date 10/24/2002 9:05PM

End Date 10/24/2002 9:05PM

Callback Date **Time**

Related Transactions

Customize | Find | First 1 of 1 Last

Type	Start Date & Time	Comments
Case	10/24/2002 9:05PM	Viewed/Updated Case No. 220334

Modified 10/24/2002 9:05PM PDT SAMPLE

[Return to Interaction List](#)

Interaction page

Customer Information

Contact Displays the name of the person (company contact, partner contact, consumer, or worker) for whom you created the interaction.

Interaction Information

The fields in this group box are identical to the fields in the Log Interaction group box on the 360-Degree View page.

See [Chapter 19, "Using the 360-Degree View," page 335](#).

Related Transactions

This grid lists any subinteractions (including notes) that are associated with the interaction.

Note. Your internal business processes determine whether users enter notes in the interaction itself or in another transaction (such as a case or lead) that was the subject of the phone call.

Type	Displays the type of subinteraction. Available values depend on which PeopleSoft CRM products you have licensed.
Start Date & Time	Displays the date and time that the subinteraction was created.
Comments	Displays the full text of the note if the type is <i>Note</i> . For other types of related transactions, this field is blank or it may contain comments such as <i>Added New Case</i> or <i>Multi-channel related transaction</i> .

Other Page Elements

Return to 360-Degree View	Click this link to return to the 360-Degree View page. This link appears only if you originally accessed the Interaction page from the 360-Degree View page.
Return to Interaction List	Click this link to return to the Interaction List page. This link appears only if you originally accessed the Interaction page from the Interaction List page.

Viewing Correspondence Interaction Details

Access the Interactions - View Correspondence page (click the link for an interaction that represents correspondence on the Interaction List page).

The fields on this page are identical to the similarly named fields in the Correspondence Request page.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Understanding Correspondence and Notifications."

Chapter 18

Setting Up the 360-Degree View

This chapter provides an overview of the 360-Degree View and discusses how to:

- Define transactions for use on the 360-Degree View.
- Set up the 360-Degree View tree.
- Configure the 360-Degree View.
- Configure the 360-Degree View Search page.

Understanding the 360-Degree View

This section provides an overview of 360-Degree views in PeopleSoft CRM and discusses:

- 360-degree view integrations.
- 360-degree view search pages.
- 360-degree view system data.
- 360-degree view setup process overview.

See Also

[Chapter 17, "Working with Interactions," page 271](#)

[Chapter 19, "Using the 360-Degree View," page 335](#)

360-Degree Views in PeopleSoft CRM

The PeopleSoft CRM 360-Degree View page enables you to manage actions and interactions for a business object—a customer or contact of customer, site or contact of site, or worker. The 360-degree view provides both an entry point for interactions with the business object and a central point from which to add and search for transactions, such as agreement, installed product, defect, quote, order, case, lead, opportunity, RMA (return material authorization) and service order.

More specifically, the 360-Degree View allows the agent to:

- Access related information concerning the business relationship with the customer, partner, or worker, such as a customer's installed products and the agreement associated with each one.

- Create a supported transaction.

The agent can return to the 360-Degree View easily using the History field from the transaction.

- View the installed product hierarchy that pertains to the customer, contact, or worker.
- View and modify product registrations.
- Create a case or access a case from the context of the customer's or worker's related information, such as a particular installed product or even from the agreement associated with that product.
- Navigate to a new case page with one object in context; for example, to transfer to a new case from the context of a customer's installed product.
- Quickly perform an action without transferring to other objects, for example, creating a service order for an installed object in the background.
- Quickly verify and change first name, last name, email address, and phone number.
- View certain country-specific information in the Job and Position Summary, Pay Summary and Benefits sections of the Human Resources Help Desk (HRHD) Worker 360-Degree view.

See Reference Call Center PeopleBook for detailed information

The 360-Degree views that are available in PeopleSoft CRM are:

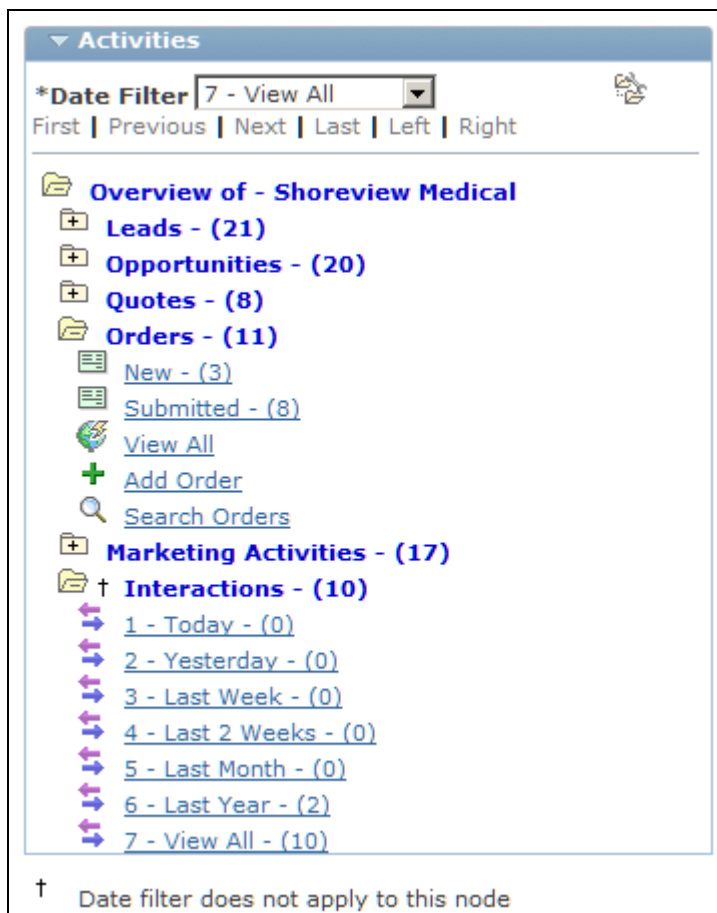
- Customer 360-Degree view.
- Partner 360-Degree view.
- Worker 360-Degree view.
- Human Resources Help Desk (HRHD) Worker 360-Degree view.
- Constituent 360-Degree view for Higher Education.

Role-specific data for a business object appears on the 360-degree view pages. The user can select a different business object role to have a different set of data appear, or search data based on date ranges that are specific to roles. Note that different 360-degree views exist for workers and customers: if an individual is both a worker and an individual consumer in your system, use the 360-degree view for the desired role to view that person's information. The worker role does not appear on the customer version and the consumer role does not appear on the worker version.

360-Degree View Trees

The 360-degree view pages represent, in tree format, the business activities between the organization (through an agent) and a customer, partner, or worker. You can build trees from the highest level of the hierarchy (root node) to the lowest level of the hierarchy. Tree terminology is derived from the concept of a family tree. The root node is the *parent*, and nodes that report to it are its *children*. Nodes that have the same parent are called *siblings*. These terms refer to the relationship between nodes and are not permanent attributes of the nodes themselves. A single node can be a parent, child, and sibling all at the same time.

A tree node in the 360-Degree View tree has three parts: the node icon, the node name, and a node description. The name and description vary depending on the type of interaction. When defining the tree, you can specify an add, view all, and search node for a particular node of the tree.



Example, 360-Degree View activity tree

In the sample data, PeopleSoft CRM delivers trees specific to these CRM applications:

- Support
- Field Service
- Sales
- Marketing
- Order Capture
- Financial Services
- Insurance
- Energy
- Communication
- Government
- HelpDesk
- Higher Education (including versions for Support case, IT case, and Blended Case)

- Human Resources HelpDesk
- Partner

Interactions

An interaction is the sum of the events that take place when a customer contacts you. It might consist of several subinteractions.

An interaction is created:

- When you click a node that is subinteraction-enabled in the 360-Degree View tree to view or change the existing transaction.
- When you perform a transaction that is subinteraction-enabled by clicking the Go button next to the Actions drop-down field on the 360-Degree View or by clicking a link in the dynamic grid.
- When you enter comments in the Note text box that appears in the Log Interaction page region and click the Save button on the 360-Degree View.
- When the 360-Degree View page appears through computer telephony integration, the system creates an interaction automatically for the phone conversation.

Subinteractions

A subinteraction is an event in an interaction.

You can configure the creation of subinteractions to meet business needs. Using the Configure Role page, you can specify whether or not to capture a transaction that you initiate from the 360-degree view as a subinteraction of a node. Note that by design, not all nodes and transactions can create subinteractions.

An interaction may contain multiple subinteractions. For example, a call with a customer may involve updating a case, adding a service order, and sending a note about the customer. All of these subinteractions are logged under the same interaction.

Interaction Nodes

This figure shows how interactions and subinteractions are represented in the 360-Degree View tree:

The screenshot displays the 360-Degree View interface. On the left, the 'Activities' tree is expanded, showing a hierarchy of categories for 'Shoreview Medical'. The 'Interactions' section is selected, showing a list of three interactions in a table format. The table has columns for 'Select', 'Date/Time', 'Contact Method', and 'Status'. Below the table, there is a section for 'Associated Sub-Interactions' with a prompt to 'Select an Interaction to view sub-Interactions.' At the bottom, there are buttons for 'Add Interaction Note' and 'Current Actions'.

Select	Date/Time	Contact Method	Status
<input type="checkbox"/>	03/30/2009 7:48:00AM	Inbound Phone	Completed
<input type="checkbox"/>	03/23/2009 6:33:35PM	Inbound Phone	Callback
<input type="checkbox"/>	03/25/2004 10:53:27AM	Inbound Phone	Callback

Interaction Node

In this example, the interaction details appear in the Dynamic grid.

Actions

The 360-Degree View page that PeopleSoft delivers enables you to view or perform actions on behalf of the customer, worker, or company. The actions that you can perform appear in the Actions drop-down list on the upper right corner of the 360-Degree View page and in a similar drop-down list below the dynamic grid to the right of the Activities tree.

Actions that you can perform in the 360-Degree View include adding a case, lead, sales opportunity, sales order or quote, service order, agreement, RMA, product registration, defect, installed product and installed bundle. You can modify this set of actions using PeopleSoft CRM setup pages.

You can also perform actions on these objects from the 360-Degree View while passing on related information, or *context*. Examples of context-endowed actions are the creation of a new case for the customer's installed product. The product would be listed in the Activities tree.

Action Categories

The action category specifies the method that performs the action that it is associated with. Because the action category is based on a method, it enables the action to pass contextual information while performing the action. Not only can you associate business unit and setID to the action performed, you can also pass the contents of a data record. This additional context enables you to carry product-related data forward into the underlying transaction required to serve the customer or worker. For example, you might configure an Add Case action category that identifies a customer's installed product and agreement on the new case.

The action category also defines the structure of confirmation information returned by the action that does not transfer to other components for performing the actions.

Setup involves:

- Specifying whether the action category is based on Business Unit, SetID or neither.
- Designating a record that returns the additional context, such as set control value or a Quick Code, which can be passed to the method.
- Specifying a component name and the market for Display Template. This information is useful for Actions that use Display Template.
- Defining the contents of a Confirmation message for those actions that are performed in the background.

Dynamic Grid

The Dynamic grid displays details of a transaction that the agent selects in the Activities tree. It is located to the right of the Activities tree. The information displayed in the grid is configurable. You can also associate actions with the Dynamic grid, which appear in a drop-down list below it. To initiate an action, the agent selects the desired row on the grid and then selects the desired action from the drop-down list.

You can configure the Dynamic grid to display a secondary level.

Details displayed on the secondary grid are related to one of the primary grid objects. For example, you may want to display the cases entered against an installed product.

The 360-Degree View also lets you configure actions that can be performed on an object from the primary grid, enabling the agent to, for example, select an Installed Product and an Agreement and create a new case referencing these objects.

Note. For performance reasons, a maximum of 100 entries will be retrieved for display in the Dynamic Grid (even if more than that number of entries exist for the corresponding node selected from the Activities tree).

360-Degree View Integrations

360-Degree Views provide integration through EIPs to PeopleSoft Enterprise Supply Chain Management (SCM) Financials, Campus Solutions, and Human Capital Management (HCM), as well as to Oracle E-Business Human Resource Management System (HRMS). Because E-Business HRMS must run on an Oracle database, integration to this application is only available when your application utilizes an Oracle database.

When you define tree nodes, you can specify enterprise integration points (EIPs) that return data from other PeopleSoft or third-party systems. This gives you the flexibility to include any type of information in the system in the 360-Degree View tree. EIPs are predefined; use them to request information from, for example, PeopleSoft SCM Financials for invoice and payment information that is associated with a customer.

You can click a receivables transaction to view the detail in PeopleSoft SCM Financials.

Note. You must enable single sign on before you can transfer from PeopleSoft CRM to PeopleSoft SCM Financials or HCM, or to E-Business HRMS.

See Also

Enterprise PeopleTools 8.50 PeopleBook: Security Administration

PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals PeopleBook, "Understanding the 360-Degree View for Industries"

360-Degree View System Data

PeopleSoft CRM delivers predefined data for the 360-Degree View; including nodes, grid definitions, action categories, and transaction groups that are associated with nodes. You can set up 360-degree view trees that use this predefined system data. You set up additional information only if you need to change defaults. Actions are provided as sample data.

360-Degree View Setup Process

When you install PeopleSoft CRM, most of the necessary information is in place for you to set up the 360-degree view tree. PeopleSoft CRM delivers predefined data for the 360-degree view; including nodes, action categories, transaction groups that are associated with nodes, and grid definitions. You can set up 360-degree view trees that use this predefined system data. Set up additional information only if you need to change defaults.

To examine the predefined data, access the page where you set up that data by following the link in each step in the process below and search with no search criteria entered. The system displays a list of the predefined data that you can browse.

The general process for setting up the 360-Degree View is as follows:

1. Determine the actions that you want to be available from the 360-Degree View and whether you want them to pass context data when they are executed.

If so, use the Action Category page to create a category that passes the data from the appropriate records. Then use the Action Definition page to associate the action with an Action Category.

See [Chapter 18, "Setting Up the 360-Degree View," Configuring Actions and Transactions for the 360-Degree View, page 293.](#)

2. Use the Transaction Group page to select the transactions that appear on the 360-Degree View, depending on the customer's role.

When configuring a role for the 360-Degree View, you specify which transaction group should apply to that role.

See [Chapter 18, "Setting Up the 360-Degree View," Defining Transaction Groups, page 301.](#)

3. Use the Dynamic Grid page to define a dynamic grid that lists important information from the transactions that are associated with each activity node.

Optionally, associate an action to the grid. This will cause the display of an Action drop-down list for creating transactions associated with objects in the dynamic grid.

See [Chapter 18, "Setting Up the 360-Degree View," Defining Dynamic Grids, page 325.](#)

4. Use the Define Node page to define tree nodes that you can use to configure the 360-Degree View tree. Associate a dynamic grid with the node.

When defining nodes, specify the node action and the type of node—placeholder, view, application class, or EIP.

See [Chapter 18, "Setting Up the 360-Degree View," Defining Nodes, page 303.](#)

5. Use the Set Up Tree page to set up the 360-Degree View tree.

When setting up the tree, you specify the tree structure, the images that appear in the tree, its size on the page, and what transaction should appear for each node on it.

See [Chapter 18, "Setting Up the 360-Degree View," Setting Up Trees, page 310.](#)

6. Use the Set Up Profile page to set up the Profile group box that appears on the 360-Degree View.

When setting up the profile, you can define the fields and buttons (as well as the buttons' actions) that appear in the Profile group box.

See [Chapter 18, "Setting Up the 360-Degree View," Setting Up Profiles, page 317.](#)

7. Use the Configure Role page to configure a PeopleTools role that is used to access the 360-Degree View.

When configuring a role, specify the tree, transaction group, and profile that you want to associate with this role. Plus, determine whether you want to capture subinteractions for the transactions that are associated with the transaction group and the nodes in the tree.

See [Chapter 18, "Setting Up the 360-Degree View," Configuring Roles, page 321.](#)

8. (Optional) If you are implementing the PeopleSoft CRM FSI Insurance or Government applications, use the User Links page to define user links that appear on the search page that accesses the 360-Degree View.

See [Chapter 18, "Setting Up the 360-Degree View," Defining User Links That Appear On the Search Page, page 330.](#)

9. Use the 360 Degree Search Preferences - 360 Degree View Search Preferences page to specify the search page that you want to use to access the 360-Degree View.

See [Chapter 18, "Setting Up the 360-Degree View," Selecting the Search Page That Is Used to Access the 360-Degree View, page 333.](#)

Configuring Actions and Transactions for the 360-Degree View

To configure transactions for the 360-degree view, use the Define Action (RB_TD_ACT_DFN), Define Action Category (RB_TD_ACT_CAT) and Define Transaction Group (RB_TD_TRANS_SETUP) components.

This section provides an overview of transactions in the 360-Degree View and discusses how to:

- Define action categories.
- Define an action.
- Define transaction groups.

Understanding Actions and Transactions

The 360-Degree View page that PeopleSoft delivers enables you to view or perform transactions on behalf of the customer or company. The transactions that you can perform appear in the Action drop-down box on the upper right corner of the 360-Degree View page.

When you create a transaction, you also create an object in the system. Transactions that you can create in the 360-Degree View include case, lead, sales opportunity, sales order or quote, service order, agreement, RMA, product registration, defect, and installed product. You can modify this set of transactions by using PeopleSoft CRM setup pages.

Actions are the tasks that create the transactions. You must associate actions to a Transaction Group when configuring a transaction.

Pages Used to Configure Actions and Transactions for the 360-Degree View

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Action Category	RB_TD_ACT_CAT	Set Up CRM, Common Definitions, 360-Degree View, Define Action Category, Action Category	Create an action category for populating the Action drop down list.
Action Definition	RB_TD_ACT_DFN	Set Up CRM, Common Definitions, 360-Degree View, Define Action, Action Definition	Assign actions to Action Categories.
Related Dynamic Grid	RB_TD_DYNGRD_SUM	Set Up CRM, Common Definitions, 360-Degree View, Define Action, Related Dynamic Grid	View the dynamic grids that the action is associated with.

Page Name	Definition Name	Navigation	Usage
Transaction Group	RB_TD_TRANS_SETUP	Set Up CRM, Common Definitions, 360-Degree View, Define Transaction Group, Transaction Group	Set up transaction groups and assign actions to them.
Copy Transaction Group As	RB_TD_TRANS_CLONE	Set Up CRM, Common Definitions, 360-Degree View, Copy Transaction Group, Copy Transaction Group As	Clone an existing transaction group. Cloning an existing transaction group makes a copy of it.

Defining Action Categories

Access the Action Category page (Set Up CRM, Common Definitions, 360-Degree View, Define Action Category, Action Category).

Action Category
Related Actions

Action Category

Category ID CASEQC
Status Active

Category Name No Transfer: Add Case using Quick Code
SubInteraction Case

Transfer Type

☐ **Transfer**

Transfer Mode
Market

☐ **Portal Content Reference**

Portal Name
Portal Obj Name

☒ **Application Class**

Class ID TreeNodePCode
Package Tree Viewer

Class Path Like RB_TD_360_APPS
Method Name AddCaseQcNoTransfer

☐ **Open in New Window**

Action Category page (1 of 3)

Options

Set Control Option Business Unit

Category Record RC_QUICK_CD_VW

Set Control Field BUSINESS_UNIT

Category Field QUICK_CD

Description Field DESCR

Display Template

Component Name RC_CASE

Component Market Global

Action Category page (2 of 3)

Confirmation Details			
Catalog Number	18040	Message Number	10179
Detail Record	RC_CASE_CNF_WRK	Case is created successfully.	
Key Fields			
Field Name	BUSINESS_UNIT	Sequence	1
Display Fields			
Field Name	CASE_ID	Display Type	Hyperlink
Field Label ID	CASE_NUMBER	Label Type	Long Name
Sequence	1	Description	Case Number
Field Change Event			
<input type="radio"/> Transfer			
Navigation		Market	
Action			
<input type="radio"/> Portal Content Reference			
Portal Name		Portal Obj Name	
<input checked="" type="radio"/> Application Class			
Class		Package Tree Viewer	
Class Path Like		Method Name	
RB_TD_360		TransferToCase	
<input type="radio"/> None			
Modify System Data		Copy	

Action Category page (3 of 3)

Action Category

This section defines the method that will be invoked by the actions that are associated with this Action Category. It can be a Component transfer or a Portal reference or an Application Class. Action Category that requires additional context to be passed must always have an Application Class. For example, passing Quick Codes in addition to Display Template information for creating a Case.

Status Defines the Action Category status; either *Active* or *Inactive*. Only action categories that are active appear in the Action drop down.

Subinteraction Select a subinteraction to correspond to the Action Category. The subinteraction appears on the Subinteraction list of the associated interaction, if any.

Transfer Type

Transfer Select to transfer to another PeopleSoft CRM component and page. If you select Transfer, use the Component Navigation and Component Market fields to select the transaction to transfer to.

Transfer Mode Select the mode in which to open this page for the transaction. Values are *Add*, *Correction*, and *Update/Display*.

Market	Select the desired market associated with the component to which the system transfers. A component is uniquely identified by its name and its market association. You can add records for each market.
Navigation	Select the Navigation Path to the desired component page. See <i>PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook</i> , "Defining Control Values for Business Objects," Defining Component Transfer Navigation.
Portal Content Reference	Select to transfer to a PeopleSoft CRM portal page that you define. If you select Portal Content Reference, use the Portal Name and Portal Object Name fields to select the destination portal page.
Application Class	Select Application Class to specify a PeopleCode application class to control the transfer. You can click the Package Tree Viewer link to search for application classes. See <i>PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook</i> , "Using Application Classes."

Options

Use the Options fields to specify data retrieval information and additional context for the category's actions as well as display options. The Display Template fields determine the display template for the component that the action transfers to (if applicable).

Set Control Option	Select <i>Business Unit</i> , <i>Set ID</i> or <i>None</i> to specify the basis for tableset sharing for the action category. The default value is <i>None</i> . This is a required field.
Category Record	Select the category record that returns the additional context to be passed to the method, such as the set control value or Quick Code.
Set Control Field	Select the name of the set control field that appears in the Category Record. Available fields are determined by the Category Record selected.
Category Field	Select the category identifier field to appear in the Category Record. Available fields are determined by the Category Record selected.
Description Field	Select the description field that displays the desired text description of the action category when it is presented for selection during setup tasks. Available fields are determined by the category record selected.
Display Template	If the action requires a display template, select a component or a market, or a component <i>and</i> a market, to determine the display template to be used by the action.

Confirmation Details

Some actions transfer the system to another component. This would be typical if the user selected the Add Service Order action that requires further data entry on the Service Order page before it can be submitted. It is evident that the action was completed successfully when the 360-Degree View is replaced by the page of the component used in the action. Use the fields in the Confirmation Details group to specify how the system responds when an action that does *not* transfer the user to another component is completed.

In a confirmation, you can specify:

- Text message

The text message is shown in the figure as the single line, "Case was successfully created."

- Action details

Action details are the information that appears in the white panel. They are the fields defined in the Category Record. In the figure, this is the Case Number, Problem Summary, and Status fields. You can specify up to three fields.

The links at the bottom of the confirmation are not configurable.

In the page examples in this section, in which the action creates a case in the background using Quick Code, the confirmation includes a text message, the case number and summary, and a link to the case. Note that the Transfer option is not selected, as transfer is defined by the Quick Code.

Note. Before you can configure a confirmation, there must be a record in the database for storing the transaction's runtime information (the Detail Record). Records are created in Application Designer.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer Developer's Guide*

Catalog Number and Message Number	Select the Catalog Number and Message number to display the desired text on the confirmation message.
Detail Record	Select the record that defines the structure of the confirmation message. You can display a maximum of three fields.

Key Fields

Specify search criteria for retrieving data from the Category Record. Define additional keys using the Add mode.

Field Name	Select the name of a key field from those available for the Category Record.
Sequence	Specify the order of the key field in the search sequence.

Display Fields

Use Display Fields options to specify the fields containing the information in the Detail Record that you want to appear on the confirmation.

Field Name	Select the name of the field whose values you want to appear in the confirmation detail (white panel). Available fields are determined by the Detail Record selected.
Display Type	<p>Select one of the following to indicate how the field name value is to be displayed on the confirmation:</p> <ul style="list-style-type: none"> • <i>Hyperlink</i> Select <i>Hyperlink</i> to enable the user to initiate the transfer by clicking on the field value text. • <i>Long Translate</i> Not supported. This option is for the display of a string that contains the Long translate (XLAT) value of the field, provided the field is based on a translate table. • <i>Others</i> Select this option to display the value as a read-only. • <i>PushButton</i> Not supported. Select to make this field appear as a button that initiates the transfer. • <i>Related Display</i> Not supported. This option is for display of a custom element. • <i>Short Translate</i> Not supported. This option is for the display of a string that contains the Short translate (XLAT) value of the field, provided the field is based on a translate table.
Field Label ID	If you want the field to be displayed by its label, select <i>Field Label ID</i> .
Label Type	If you selected Field Label ID, specify whether to display the Long Name or Short Name for the field label.
Sequence	Enter 1, 2, or 3 to indicate the position of the text field in relation to the other text fields.
Description	The text description specified for the Display Field. It is not editable here.
Field Change Event	
This section appears if you select <i>Hyperlink</i> as the Display Type.	
Transfer	Select to transfer to another PeopleSoft CRM component and page.

Navigation	Select the navigation path to the desired component page. See <i>PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook</i> , "Defining Control Values for Business Objects," Defining Component Transfer Navigation.
Market	Select the desired market associated with the component being transferred to. A component is uniquely identified by its name and its market association. You can add records for each market.
Action	Select the mode in which to open the component page being transferred to. Values are <i>Add</i> , <i>Correction</i> , and <i>Update/Display</i> .
Portal Content Reference	Select to transfer to a PeopleSoft CRM portal page that you define. If you select Portal Content Reference, use the Portal Name and Portal Object Name fields to select the destination portal page.
Application Class	Select to launch an application class that controls the transfer. You can click the Package Tree Viewer link to search for application classes.
Copy	Click to clone the Action Category. Any changes you made to the original action category are then saved, and the Copy Action Category page appears. The page contains a prompt for a new action category ID. Clicking the OK button creates the cloned action category and gives it the name of the original Action Category with the prefix <i>Copy of</i> .

Defining an Action

Access the Action Definition page (Set Up CRM, Common Definitions, 360-Degree View, Define Action, Action Definition).

Action Definition | Related Dynamic Grid | Related Transaction Group

Action

Action ID CASEUPDCNT

***Action Name** [Add Case-Owner's Manual]

***Action Category** CASEQC No Transfer: Add Case using Quick Code

Display Template ID RC_SUPPORT Support

Set Control Value US200 CRMCO APPLIANCES

Category Value Owner's Manual Request

Stamp System Data Copy

Audit History

This object was delivered by PeopleSoft but updated by the customer.

Created 12/16/2004 1:24PM PST **By** dgermill Stu Marx

Modified 02/18/2005 12:08PM PST **By** dgermill Stu Marx

* Required Field

Action Definition page

Action Name	Enter the name that you want to appear in the Actions drop down list.
Action Category	Select an action category to associate the action with. You must associate an action with an action category so that it appears on the Actions drop down list.
Display Template ID	Select a display template to be used for the action. This field is hidden if the component for display template is not defined in the action category.
Set Control Value	Select a set control value. This field is hidden if the Set Control option in the Action Category field is set to <i>None</i> .
Category Value	Select a category value. Available category values are determined by the selected set control value.

Viewing an Action's Associated Transaction Groups and Dynamic Grids

Access the Related Transaction Group and the Related Dynamic Grid pages. Actions are associated with transaction groups and dynamic grids in the Transaction Group and Dynamic Grid pages. The transaction groups and dynamic grids to which the action is associated will appear on the Related Transaction Group and Related Dynamic Grid pages for your reference. An action can be associated with no transaction groups or dynamic grids, or one, or more than one.

See [Chapter 18, "Setting Up the 360-Degree View," Defining Dynamic Grids, page 325.](#)

See [Chapter 18, "Setting Up the 360-Degree View," Defining Transaction Groups, page 301.](#)

Defining Transaction Groups

Access the Transaction Group page (Set Up CRM, Common Definitions, 360-Degree View, Define Transaction Group, Transaction Group).

Transaction Group

Transaction Name GOVTRANS

Description Actions for CRM for Government.

Related Actions

Order	*Action Name	Action ID	Disable for Inactive BO	Default	Status	Date Created	Created By	
10	Add Case	CADD-04	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Active	12/09/2004 10:00AM	sswamy	
20	Search Cases	CUPD-04	<input type="checkbox"/>	<input type="checkbox"/>	Active	12/09/2004 10:00AM	sswamy	
31	Add Order	ORD_FED01	<input type="checkbox"/>	<input type="checkbox"/>	Active	04/10/2006 1:15PM	JBRILLAN	
32	Add Order	ORD_EGNBU	<input type="checkbox"/>	<input type="checkbox"/>	Active	04/10/2006 1:15PM	JBRILLAN	
33	Add Order	ORD_STA01	<input type="checkbox"/>	<input type="checkbox"/>	Active	04/10/2006 1:15PM	JBRILLAN	
40	View Literature	PCG	<input type="checkbox"/>	<input type="checkbox"/>	Active	12/09/2004 10:00AM	sswamy	
50	Add Quote	QUOT	<input type="checkbox"/>	<input type="checkbox"/>	Inacti	12/09/2004 10:00AM	sswamy	

Add Action

Audit History

Created	08/01/2002 6:22AM PDT	By	GOVDEMO	John Henry
Modified	02/22/2005 3:28PM PST	By	dgermill	Stu Marx

Transaction Group page

Transaction Name (transaction group name) The transaction group is the set of transactions that is available in the 360-Degree View.

Related Actions

Order Specifies the order in which the Actions will be displayed in the drop-down.

Action Name	<p>Select an action from the list of those that are available.</p> <p>You can insert a <i>separator</i> action to indicate actions that do not transfer the agent to another page. At run time, the separator action appears as a dotted line in the drop down list. For example, the system supplies a separator action in the Support Transaction Group. The sample action Add Case - Contact Updated will be added below this separator action.</p> <p>Note the dotted line entry {-----}. This is not an action but a text separator for the run time drop down list. As delivered, the separator divides the actions that transfer the agent to another component—the first group of actions—from those that don't. If you want to preserve this distinction, place new actions above or below the separator as appropriate. You can't delete the separator, and at run time, the user can't select it.</p>
Disable for Inactive BO	Select to disable actions for business objects that are specified as <i>Inactive</i> on the page. A worker who is no longer employed is an example of an inactive object.
Default	Specifies the default actions for the drop-down.
Status	Specifies whether the action is <i>Active</i> or <i>Inactive</i> . The default is <i>Active</i> . Only active actions are displayed in the drop-down list box.
Add Action	Click to append a new action row to the list of related actions.

Setting Up the 360-Degree View Tree

To set up the 360-Degree View Tree, use the Define Node (RB_TD_NODE), Set Up Tree (RB_TD_TREE_DEFN), and Define Dynamic Grid (RB_TD_DYNGRD) components.

This section lists prerequisites and discusses how to:

- Define nodes.
- View and access trees associated with the 360-Degree View node.
- Set up trees.
- Set up nodes.
- Test trees.
- Search for and view application packages.

Pages Used to Set Up the 360-Degree View Tree

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Node	RB_TD_NODE	Set Up CRM, Common Definitions, 360-Degree View, Define Node, Define Node	Define nodes that you can use to configure the 360-Degree View Tree.
Related Trees	RB_TD_NDE_RELTOTRE	Set Up CRM, Common Definitions, 360-Degree View, Define Node, Related Trees	View and access tree names that are related to the 360-Degree View node.
Dynamic Grid	RB_TD_DYNGRD_PG	Set Up CRM, Common Definitions, 360-Degree View, Define Dynamic Grid, Dynamic Grid	Define search criteria to associate to a node and component transfers for the grid.
Application Packages Lookup	RB_APPLPKG_PG1	Click the Package Tree Viewer link on the Define Node page.	Search for and view the available application packages or classes that PeopleSoft CRM provides.
Set Up Tree	RB_TD_TREE_DEFN	Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Set Up Tree	Define the tree configuration (images that appear in the tree, image size, page size, and date filter).
Tree Node	RD_TD_TREE_NDE	Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Tree Node	Define the parent and child relationship of the tree nodes.
Test Your Tree	RB_TD_TREE_TEST	Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Test Your Tree	Test the 360-Degree View tree to ensure that you configured it correctly.
Copy Tree As	RB_TD_TREE_CLONE	Set Up CRM, Common Definitions, 360-Degree View, Copy Tree, Copy Tree As	Copy an existing tree.

Defining Nodes

Access the Define Node page (Set Up CRM, Common Definitions, 360-Degree View, Define Node, Define Node).

Define Node

Related Trees

Define Node

*DescriptionOrders

SubInteractionOrder

☐ Root Node

NodeORDER

Node Action

☒ Transfer

NavigationOrder

Action ModeUpdate/Display

☐ Portal Content Reference

Portal Name

☐ Application Class

Class ID

Class Path

☐ Dynamic Grid

Grid ID

Related Grid ID

☐ None

MarketGBL

Portal Object Name

[Package Tree Viewer](#)

Method Name

Define Node page (1 of 3)

Node Type

Placeholder

Placeholder TypeFolder

Disable for Inactive BO

View

*View NameRI_ORDER_VW

Key Field 1CAPTURE_IDCharacter

Key Field 2BUSINESS_UNITCharacter

Fields to Display

CustomizeFindView All1-3 of 3Last

Display Details

Order by Details

Related Field Details

Sequence	*Field Name	Display	Display In	Display Length	Display Value		
1	CAPTURE_DATE	<input checked="" type="checkbox"/>	First	20	Value	+	-
2	STATUS_CODE	<input checked="" type="checkbox"/>	Second	10	Related Display	+	-
3	CAPTURE_ID	<input checked="" type="checkbox"/>	Second	10	Value	+	-

EIP - (Synchronous)

Class for Request Message

Class ID

Class Path

Method Name

Package Tree Viewer

Request Message

*Response Message

Key Field 1

Key Field 2

Fields to Display

CustomizeFindView All1 of 1Last

Sequence	*Field Name	Display	Order By	Order Sequence	Display In	Display Length		
1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ascending	First	10	+	-


Define Node page (2 of 3)


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PeopleCode


Package Tree Viewer


Class ID  [Package Tree Viewer](#)


Class Path Like  Method Name



*Record Name 

Key Field 1 

Key Field 2 

Fields to Display Customize | Find | View All |  First 1 of 1 Last

Display Details | Order by Details | Related Field Details | 

Sequence	*Field Name	Display	Display In	Display Length	Display Value		
1	<input type="text"/>	<input checked="" type="checkbox"/>	First	10	<input type="text"/>		

Created 07/24/2002 10:27PM PDT By CVP1

Modified 11/01/2002 10:31AM PDT By CVP1

* Required Field

Define Node page (3 of 3)

SubInteraction Select a subinteraction that corresponds to the transaction that is associated with the tree node.

Root Node Select if the node that you are defining is the root node.

Node Action

For each tree node, specify the node action. Node actions are:

Transfer Transfers the user to a PeopleSoft CRM component and page that you define.

If you select *Transfer*, use the Navigation, Market, and Action Mode fields to select where you want the transaction to transfer.

Define the transfer fields using the Component Navigation component.

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Defining Control Values for Business Objects," Defining Component Transfer Navigation.

Market Specify the name of the market with which the component is associated. A component is uniquely identified by its name and its market association. You can add records for each market, thus adding context to the node information.

Action Mode Select the mode in which to open this page for the transaction. Values are *Add*, *Correction*, *Update*, and *Update/Display All*.

Portal Content Reference	<p>Select to transfer to a PeopleSoft CRM portal page that you define.</p> <p>If you select Portal Content Reference, use the Portal Name and Portal Object Name fields to select the portal page to which you want to transfer.</p>
Application Class	<p>Select to call a PeopleSoft CRM application class.</p> <p>If you select Application Class, use the Class ID, Class Path, and Method Name fields to enter the application class that you want the system to call.</p>
Package Tree Viewer	<p>Click to search for and view the available application packages that PeopleSoft CRM provides. When you click this link, the Application Packages Lookup page appears. The information that you select on this page appears on the Define Node page after you click OK.</p>
Dynamic Grid	<p>Click to associate a dynamic grid to the node.</p>
Grid ID and Related Grid ID	<p>Defines the name of the primary grid and its related secondary grid. Prompts display the available Dynamic grids.</p> <p>If you have specified a Related Grid, you must select values in the fields under the No Context Selected Message, No Related Rows Found Message, and Search Fields for Related Grid sections.</p>
No Context Selected Message	<p>Select a message to display in the secondary grid when no rows are selected from the Dynamic grid.</p>
No Related Rows Found Message	<p>Select a message to display in the secondary grid when no rows are found for the selected row in the Dynamic grid. Select a message from the Message Catalog.</p>
Search Fields for Related Grid	<p>Click the Add Search Field button to create a grid list of the search fields that are common to the primary and secondary grids that must be used to retrieve data in secondary grid. You must specify these fields if you have a related grid.</p>
None	<p>Indicates that no action is associated with the node.</p>

Node Type

The fields in this section enable you to define the node type.

Placeholder and Placeholder Type

Select to indicate that this node is represented as a placeholder on the 360-Degree View tree.

Specify the placeholder type. Values are:

- Add Node

Select to have the tree node represent an add node.

- Folder

Select to indicate that the tree node is a placeholder that is represented by a folder.

- Search Node

Select to have the tree node represent a search node.

- View All

Select to have the tree node represent a view all node. This applies only to the dynamic grid action on the node.

Disable for Inactive BO
(disable for inactive business object)

Select to prevent the action from being performed on business objects that are inactive.

View

Select to define the information that appears in this node, then provide values for the following fields.

View Name

Enter the view name that is associated with this node.

Key Field 1 and Key Field 2

Enter key fields for the view.

Note. These fields must appear as the first part of the key structure: RB_TD_360_SBR. Additionally, the view should include the RB_TD_360P_SBR and RB_AUDIT_SBR subrecords in any order.

Fields to Display

Indicate the fields that appear and the order in which the fields appear.

When appearing under the node of the 360-Degree View tree, view information is divided into two sections. The first section can contain 20 characters, and the second can contain 30 characters. Specify which fields you want to appear in which sections, and in what order. Also, you can specify how the information is sorted.

The two sections are separated by a hyphen. If two or more fields appear in one section, those field values are separated by a colon. For example, under an Orders node, you might see this information coming from a view: 2002-09-20 - Pending:d0e5061fcc. In this case, the capture date is defined for the first section, and the status code and capture ID is defined for the second section.

Sequence

Enter a number in sequence. This number defines the order in which the fields appear in the different sections for the node.

Display	Select to have this field appear for the node on the customer 360-Degree View tree.
Display In	Select the section in which to display this field. Values are <i>First</i> , <i>Second</i> , and <i>No Display</i> .
Display Length	Enter the length of the field.
Display Value	<p>Select the value that appears for this field. Values are: <i>Long Translate</i>, <i>Related Display</i>, <i>Short Translate</i>, and <i>Value</i>.</p> <p>If you select <i>Related Display</i>, use the Use SetID, Record Name, and Column Name fields on the Related Field Details tab to select the related field details. One of the fields of the record entered should include the selected field in the node view. If the value selected is based on setID, the node view should have a key field 2 of <i>SETID</i> or <i>BUSINESS_UNIT</i>.</p>
Order By Details	Select for the fields by which you want to sort the information. Then use the Order Sequence field to select how you want to sort the information. Values are <i>Ascending</i> and <i>Descending</i> .
EIP - (Synchronous)	<p>Select to indicate that the information that appears in this node is gathered from a PeopleSoft EIP.</p> <p>If you select this option, you must specify the EIP information and define how the information is to appear on the 360-Degree View tree.</p>
Class ID, Class Path, and Method Name	Enter the application class information for this EIP. The method that your assign here is used to create the request message and populate the node with the requested information.
Request Message	Enter the application request message for this EIP.
Response Message, Key Field 1, and Key Field 2	Enter the response application message for the EIP and its keys.
PeopleCode	<p>Select to indicate that the information that appears in this node is gathered from executing PeopleCode</p> <p>If you select this option, you must specify the application class ID and method name.</p>
Class ID, Class Path Like, and Method Name	Enter the application class information for the PeopleCode class.
Record Name	Enter the record name that contains the data.
Key Field 1 and Key Field 2	Enter the key fields for the record name.
Fields to Display	The group boxes for EIPs and PeopleCode is the same as the Fields to Display group box for Views. Use these fields to control how the information appears under the node of the 360-Degree View tree that is associated with an EIP.

Viewing and Accessing Trees Associated With the 360-Degree View Node

Access the Related Trees page (Set Up CRM, Common Definitions, 360-Degree View, Define Node, Related Trees).

Define Node


Related Trees

Define Node

Description Orders

Node ORDER

Related Trees

Find |  First 1-4 of 4 Last

Tree Name
CORETREE
ENERGYTREE
MOBILETREE
TELCOTREE

Related Trees page

Use this page to view and access the trees that are related to the node being set up for the 360-Degree View. Click the link under the Tree Name field to access the Set Up Tree page.

Setting Up Trees

Access the Set Up Tree page (Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Set Up Tree).

Set Up Tree
Tree Node
Test Your Tree

Tree Name CORETREE
*Market Global
*Description Core Tree
☐ Default Tree

Tree Configuration

Expanded Image PS_TREE_EXPANDED
Leaf Image Name PS_TREE_LEAF
End Node Image PS_TREE_END_NODE
Collapsed Image PS_TREE_COLLAPSED
Image Height 16
Image Width 16
Page Size 16
Display Levels 12
Date Filter 6 - Last Year
Max. Date Filter
Filter Dates By Creation Date
*Callback Interaction Do not set status to com
Footnote Icon PS_FOOTNOTE_ICN

Audit History

Created 07/09/2002 6:01PM PDT By CVP1
Modified 02/07/2004 4:59PM PST By FSIADMIN Owen Selanne

* Required Field

Set Up Tree page

Market Select the market with which to associate the tree.

Default Tree Select to make this tree the default tree for the market selected above on the 360-Degree View. Select this check box to make this tree the default tree for the market selected above. This tree will then appear on the 360-Degree Views that are associated with this market. If you do not make this tree the default, the user might not be able to see any tree in the Activities section.

Tree Configuration

Expanded Image, Leaf Image Name, End Node Image, and Collapsed Image Enter the images that appear on the tree. The image appears in the Image Preview half of the group box. Leaf Image is used as a default leaf image of the node.

Image Height and Image Width Enter the size of the image that appears on the tree. The default size is 16 by 16.

Display Levels Enter the number of levels up to which the 360-Degree View tree is configurable.

Page Size Enter the page size for the 360-Degree View tree. This is the size of the HTML area where the 360-Degree View tree appears on the 360-Degree View.

Date Filter

Select the filter for the tree. Values are:

- 1 - *Today*
- 2 - *Yesterday*
- 3 - *Last Week*
- 4 - *Last 2 Weeks*
- 5 - *Last Month*
- 6 - *Last Year*
- 7 - *View All*

Note. All date filters include the values for today. For example, select 2 - *Yesterday* to show information that is related to today and yesterday.

Max. Date Filter
(maximum date filter)

Select the maximum date filter, which is used as a restriction against the date field that the user actually enters.

The system always looks at this filter when determining the information that appears on the 360-Degree View tree, regardless of what the user specifies in their date personalization settings.

If this filter is not set, and if you select View All in the date personalization on the 360-Degree View, and if you select Enable Filtering on Date Range, then the system populates the start date with 01/01/1900 on the 360-Degree View.

Filter Dates By

Select either *Creation Date* to filter dates by the entity's creation date or *Last Modified Date* to filter dates by the entity's last modification date.

Callback Interaction

Select how the system should set the status of an interaction when a user clicks the Finish Interaction button. Values are *Set Status to Complete* and *Do not Set Status to Complete*

Footnote Icon

Select an alternate symbol to indicate a footnote in the 360-Degree View. The system defaults this field to the *dagger* symbol. As an alternative symbol, you can select two asterisks (**). The footnote itself appears next to a node and indicates that the date filter is not applied to the node data.

Setting Up Nodes

Access the Tree Node page (Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Tree Node).

Set Up Tree
Tree Node
Test Your Tree

Tree Name CORETREE

Node Setup
Find | View All First 1 of 41 Last

*Tree Node QUOTEADD *Status Active

Parent Node Quotes Sequence

Node Parameters

Leaf Image PS_PLUS_SIGN_ICN + Display Folder As Folder

Maximum Number of Rows to

Display 5

Fetch 20

☐ Expand

☐ Hide Node if No Children

☐ Apply Date Filter

Created 07/09/2002 6:01PM PDT By CVP1

Modified 02/07/2004 4:59PM PST By FSIADMIN Owen Selanne

* Required Field

Tree Node page

- Tree Node** Select the child node for the 360-Degree View tree.
- Parent Node** Select the parent node under which this child node appears in the 360-Degree View tree.
- Status** Select the tree node's status, either *Active* or *Inactive*. Only active nodes appear on the tree.
- Sequence** Enter the order in which the child nodes appear on the tree. The sequencing is from low to high.

Node Parameters

- Leaf Image** Select the image for the leaf. The image appears next to the field. If you leave this field blank, the system uses the default tree leaf image.

Display and Fetch

Enter the maximum number of rows that initially appear under the expanded node in the 360-Degree View Tree located in the Activities section of the page. Then enter the maximum number of rows to fetch, or retrieve, from the database and to display under the node when the user clicks *View All* on that tree node.

The Display option is only valid for the *View* and *EIP* node types. If the field is blank for either of these node types, the system uses a default value of 5. Values in this field are ignored for other node types.

The Fetch option is only valid for the *View* and *Peoplecode* node types. If the field is blank for either of these node types, the system uses a default value of 1000. Values in this field are ignored for other node types.

Note. The Display and Fetch options do not apply to the *Dynamic Grid* node action, and they do not influence or control the number of rows generated in the dynamic grid.

Display Folder as

Select whether you want the node to appear as a folder or a leaf.

Expand

Select to expand the nodes on the tree when the tree initially appears on the 360-Degree View.

Hide Node if No Children

Select to hide the node if there are no values. For example, if the customer has no cases, the Case node does not appear on the tree.

Apply Date Filter

Select to apply a date range to the activities for the given node. This is selected by default. If cleared, the date range criteria does not apply to that node.

Testing Trees

Access the Test Your Tree page (Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Test Your Tree).

Test Your Tree page

To test a tree:

1. Enter data into one or more of the fields in the Test Tree page region.
2. Click the Test Tree button.

The system verifies the tree configuration and a preview of the tree appears in the Activities group box.

Searching for and Viewing Application Packages

Access the Application Packages Lookup page (click the Package Tree Viewer link on the Define Node page).

Application Packages Lookup

Filters for Lookup

Search By Class TDPCode

Class Path RB_TD_360

Application Class Tree

Package Root Sub Package Application Class

First | Previous | Next | Last | Left | Right

[Expand All](#) [Collapse All](#)

RB_TD_360

Application Packages Lookup page

Click any tree node to select the application class, then click OK. The system returns the information to the page from which you transferred.

Filters For Lookup

Select either Class or Class Path in the Search By field and enter either an application class ID or application class path.

Application Class Tree

The tree for the application class appears in this portion of the page.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Using Application Classes"

Configuring the 360-Degree View

To configure the 360–Degree View, use the Set Up Profile (RB_TD_PROF_SET) and Configure Role (RB_TD_ROLE_TREE) components.

This section discusses how to:

- Set up profiles.
- Configure roles.

- Define transactions with subinteractions.
- Specify nodes to capture subinteractions.
- Define dynamic grids.
- Relate actions to dynamic grids.

Pages Used to Configure the 360-Degree View

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Set Up Profile	RB_TD_PROF_SETUP	Set Up CRM, Common Definitions, 360-Degree View, Set Up Profile, Set Up Profile	Define a profile that appears on the 360-Degree View.
Configure Role	RB_TD_ROLE_TREE	Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Configure Role	Configure tree information for a role.
Transaction Sub-Interactions	RB_TD_SUB_TRANS	Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Transaction Sub-Interactions	Define the transactions for which to capture subinteractions.
Node Sub-Interactions	RB_TD_SUB_NODE	Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Node Sub-Interactions	Define the nodes for which to capture subinteractions.
Dynamic Grid	RB_TD_DYNGRD_PG	Set Up CRM, Common Definitions, 360-Degree View, Define Dynamic Grid, Dynamic Grid	Define the grid on which transaction information appears.
Action Category	RB_TD_ACT_CAT	Set Up CRM, Common Definitions, 360-Degree View, Define Action Category, Action Category	Define categories in which to group actions to display on the Action drop down.
Related Actions	RB_TD_DYNGRD_ACT	Set Up CRM, Common Definitions, 360-Degree View, Define Action Category, Related Actions	Relate actions to dynamic grids.

Setting Up Profiles

Access the Set Up Profile page (Set Up CRM, Common Definitions, 360-Degree View, Set Up Profile, Set Up Profile).

Set Up Profile

*DescriptionEnergy Profile

Profile TypeCustomer Profile

*Column Layout2

Application Class Path

*ClassCOMENGProfile

*Class PathRB_TD_360:ProfileExtensions

Method NameUpdateProfile

Package Tree Viewer

Description

MarketEnergy

☒ Default

Profile Fields to Display

Find | View AllFirst1 of 10Last

Description

RecordRD_PERSON_NAME

Field NameFIRST_NAME

Label TypeShort Name

Method NameGetFirstName

Display Row1

☒ Editable

Label IDFIRST_NAME

DescriptionFirst Name

*Display ColumnFirst Column

Set Up Profile page (1 of 2)

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▼ First Button Details

Class ID

Package Tree Viewer

Class Path

Method Name

Image Name

Image

☐ Display Image

Image Tool Tip

Catalog Number

Message Number

▼ Second Button Details

Class ID

Package Tree Viewer

Class Path

Method Name

Image Name

Image

☐ Display Image

Image Tool Tip

Catalog Number

Message Number

Created 08/07/2002 2:00PM PDT

By CVP1

Modified 03/14/2005 2:55PM PDT

By CSPADMIN

Diane Briseno

* Required Field

Set Up Profile page (2 of 2)

- Column Layout

Select the column layout for profile display.
- Profile Type

Select *Customer Profile*, *Financial Profile*, or *Other*. This field controls the information that is available for inclusion in profile data.

Application Class Path

- Package Tree Viewer

Click to search for and view all of the application packages that PeopleSoft CRM provides.

See [Chapter 18, "Setting Up the 360-Degree View," Searching for and Viewing Application Packages, page 315.](#)

Description

Market	Specify the market with which to associate this profile. A component is uniquely identified by its name and its market association.
Default	Select to set this profile as the default profile for this market.

Profile Fields to Display

Use the Add icon (+) to define multiple fields for the profile section.

Record and Field Name	Enter the record and field name that you want to appear in the 360-Degree View Profile group box.
Editable	Select the Editable check box to allow an agent to update the field's value. <hr/> Note. In this release, you can apply the Editable feature only to these fields: FIRST_NAME, LAST_NAME, EMAIL_ADDR, ADDRESS_PHONE, and EXTENSION. Also, profile fields for PeopleSoft Enterprise HelpDesk for Human Resources are not editable because the profile information resides in the Human Resources database. <hr/>
Label ID	Enter the label ID for this field in the Profile group box.
Label Type	Select whether you want the <i>Long Name</i> or <i>Short Name</i> to appear for this field in the Profile group box.
Method Name	Enter the name of the method that fetches the data from the record that you have specified. This method comes from the application class defined Application class path section.
Display Row	Enter a number to indicate the fields horizontal placement in the Profile group box relative to the other fields. Be sure that you take into account the number of Display columns when you plan the layout of the fields in the Profile group box.
Display Column	Select <i>First Column</i> (left side) or <i>Second Column</i> (right side) to indicate the field's vertical placement. <hr/> Note. If you want to move the Address field from the default first column to the second column, additional code change is required. <hr/>

First Button Details and Second Button Details

Use the fields in these sections to define the buttons in the 360-Degree View Profile group box. You can use these two to add any drill down actions like transferring to a transaction or opening a 360-Degree View page for the parent business object.

You can specify one, two, or no buttons. If there are any editable fields in the profile, the system automatically displays the Apply Changes button.

Class ID, Class Path, and Method Name	Enter information to locate and identify the method that is executed when a user clicks the first or second button in the 360-Degree View row.
Image Name	Select a button image from the lookup list.
Display Image	Select to enable the button's display.
Image Tool Tip	Select an appropriate label for the popup tool tip.

Configuring Roles

Access the Configure Role page (Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Configure Role).

Configure Role

Transaction Sub-Interactions

Node Sub-Interactions

*Role Name

HRHD 360 Degree View User

*Transaction Name

HRHDTRAN

*Tree Name

HRHDTREE_89

*Profile

HR Help Desk Profile

*Financial Profile

*Other Profile

Grid ID

GBL_HRHD_DFL

*Sequence Number

1000

View Type

HR HelpDesk Worker

☐ Financial Account Grid

☐ Policy Grid

360-Degree View Section

Sections	Enabled
Absence	<input checked="" type="checkbox"/>
Benefits	<input checked="" type="checkbox"/>
Direct Reports	<input checked="" type="checkbox"/>
Job and Position Summary	<input checked="" type="checkbox"/>
Pay Summary	<input checked="" type="checkbox"/>

Configure Role page

Role Name Select a PeopleTools role.

Transaction Name	<p>Select the transaction group that you want to associate with this PeopleTools role.</p> <p>See Chapter 18, "Setting Up the 360-Degree View," Defining Transaction Groups, page 301.</p>
Tree Name	<p>Enter the tree that you want to associate with this PeopleTools role.</p> <p>See Chapter 18, "Setting Up the 360-Degree View," Setting Up Trees, page 310.</p>
Profile	<p>Enter the profile that you want to associate with this PeopleTools role.</p> <p>These profiles are available as system data:</p> <ul style="list-style-type: none"> • COMPR (Communications Profile). • CORE (Core Profile). • EBSHR (HR Help Desk Profile for E-Business HRMS). • ENGPR (Energy Profile). • FSIPR (FSI Profile). • INSPR (Insurance Profile). • HE (Higher Education Profile). • HRHD (HR Help Desk Profile). • WRKER (Worker profile). <p>See Chapter 18, "Setting Up the 360-Degree View," Setting Up Profiles, page 317.</p>
Sequence Number	<p>Enter a number that the system uses to determine which role information appears by default on the 360-Degree View when the user has more than one role in the system.</p> <p>For example, if a user has the PeopleSoft User role with sequence number 20 and the Support Manager role with sequence number 10, then the information that is related to the Support Manager role is used to initially populate the 360-Degree View because it has the lowest sequence number.</p> <p>The user can change the role that appears.</p> <p>See Chapter 18, "Setting Up the 360-Degree View," Configuring Roles, page 321</p>

View Type

Select the type of view for this role. Values are:

- *Constituent*
- *Customer*
- *Partner*
- *HR HelpDesk Worker*
- *Worker*

If the View Type is *Constituent* or *HR HelpDesk Worker*, the 360-Degree View Section grid is displayed listing all the possible extra sections that can appear on the 360-Degree View page: select the corresponding Enabled check box for each section that should be displayed for that role.

The system uses the view type to determine the role and related information that appears in the 360-Degree View. If the view type has any of the above values, the system selects only the role with the specified view type having the lowest sequence number.

For example, a user has the PeopleSoft User (sequence number 10, view type of Customer), HR HelpDesk Agent (sequence number 20, view type of HR HelpDesk Worker), Support Admin (support administration; sequence number 25, view type of Customer), and IT HelpDesk Agent (sequence number 30, view type of Worker) roles. When launching the 360-Degree View from Case, if the view type is *Worker*, then the system selects the IT HelpDesk Agent role and shows the HelpDesk tree with HelpDesk Profile information. If the view type is *Customer*, the system selects the PeopleSoft User role because it has a sequence number less than that of the Support Admin role.

Financial Account Grid Check this option to display a customer's accounts

Policy Grid Check this option to display a customer's policies.

Note. When integrating with PeopleSoft or E-Business HRMS, the information on the Configure Role page determines in part the data that needs to be brought over from the corresponding Human Resource system. Unlike the integration to PeopleSoft HCM, no entity level security is imposed by Oracle E-Business. In E-Business, security is imposed by the virtue of the functions to which the user has access.

Defining Transactions with Subinteractions

Access the Transaction Sub-Interactions page (Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Transaction Sub-Interactions).

Configure Role
Transaction Sub-Interactions
Node Sub-Interactions

Role Name FSI Agent
Transaction Name FSITRANS

Capture Sub-Interactions for

Transactions			Customize	Find	View All	First	1-5 of 19	Last
*Transaction	Transaction Type ID	Capture Sub-Interaction						
Account Address Change	ACAD	<input type="checkbox"/>						
Account Nickname	ACNN	<input type="checkbox"/>						
Automatic Funds Transfer	AFTS	<input type="checkbox"/>						
Pay Bills	BLPY	<input type="checkbox"/>						
Add Case	CADD-03	<input type="checkbox"/>						

Audit History

Created 07/25/2002 11:39AM PDT **By** FSISYSTEM Owen Selanne
Modified 11/18/2004 10:09AM PST **By** amaurya

* Required Field

Transaction Sub-Interactions page

When you access this page, all transactions that are associated with the transaction group appear.

Capture Sub-Interaction Select to enable the corresponding transaction to capture subinteractions for this role.

Note. Not all transactions were designed to be able to capture sub-interactions. The Capture Sub-Interaction check box is disabled for any transaction for which it does not apply.

Specifying Nodes to Capture Subinteractions

Access the Node Sub-Interactions page (Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Node Sub-Interactions).

Configure Role
Transaction Sub-Interactions
Node Sub-Interactions

Role Name FSI Agent
Tree Name FSITREE_89

Capture Sub-Interactions for

Nodes		Customize	Find	View All	First	1-5 of 17	Last
*Tree Node Description	Node ID	Capture Sub-Interaction					
Add Case	CASEADD_FIN	<input checked="" type="checkbox"/>					
Cases	CORE_CASE_89	<input checked="" type="checkbox"/>					
Accounts	FNAC	<input checked="" type="checkbox"/>					
Issue ATM Card	ISSUE_ATM	<input type="checkbox"/>					
Add Lead	LEADADD	<input checked="" type="checkbox"/>					

Audit History

Created 07/25/2002 11:39AM PDT **By** FSI SYSTEM Owen Selanne
Modified 11/18/2004 10:09AM PST **By** amaurya

* Required Field

Node Sub-Interactions page

When you access this page, all tree node descriptions that are associated with the tree appear.

Capture Sub-Interaction Select to enable the corresponding tree node to capture subinteractions.

Note. Not all nodes were designed to be able to capture sub-interactions. The Capture Sub-Interaction check box is disabled for any transaction for which it does not apply.

Defining Dynamic Grids

Access the Dynamic Grid page (Set Up CRM, Common Definitions, 360-Degree View, Define Dynamic Grid, Dynamic Grid).

Dynamic Grid
Related Actions

Dynamic Grid

Grid Definition

Grid ID ORDER_89

Description Order grid

Retrieval Type

☐ View
 View Name

☒ Application Class
 Record Name RI_ORD_STAT_VW
 Class TDPCode
 Class Path RB_TD_360
 Method GetOrderDetails

Package Tree Viewer

Grid Information

Name CAPTURE_ID

Label ID ORDERS

Label Type Long Name

*Visible Columns 4

Description Orders

Dynamic Grid page (1 of 2)

Grid Keys

Find | View All | First | 1 of 3 | Last

*Field Name BUSINESS_UNIT

*Usage Key

Sequence number 1

Sort Order

Grid Field

Find | View All | First | 1 of 5 | Last

*Field Name CAPTURE_DATE

Display Type Others

Label ID ORDER_DATE

Label Type Long Name

Sequence number 4

Description Order Date

Audit History

Created	03/02/2004 11:37AM PST	By dgermill	Stu Marx
Modified	04/22/2005 9:41AM PDT	By dgermill	Stu Marx

* Required Field

Dynamic Grid page (2 of 2)

Retrieval Type

Specify either the database view or the application class that is the source of the data that populates the dynamic grid.

View and View Name Select to indicate that the data source is a database view. Enter the name of the database view that holds data that is returned by the database view.

Application Class Select to indicate that an application class runs to provide the data that appears on the dynamic grid.

Record Name	Enter the name of the record that holds data that is returned by the application class method.
Class, Class Path, and Method Name	Enter the application class information for this application class. The method that your assign here is used to create the request message and populate the node with the requested information.
Package Tree Viewer	Click to locate an application class.

Grid Information

Enter data that names the grid and describes its appearance.

Visible Columns	Enter a number to specify how many of the fields defined in the Grid Field section will initially display in the dynamic grid. The first n fields (in order based on Sequence Number) from the Grid Field definitions will be displayed based on the number that is provided in the Visible Columns field. 360-Degree View users will be able to view the entire set of fields for the dynamic grid, if desired, by clicking the Show All Columns link.
------------------------	--

Grid Keys

Field Name	Enter the name of the field that the system uses as a key when transferring to another component.
Sequence number	Enter the sequence of the key.

Grid Field

Enter information that describes each field that appears in the grid. Add fields using the Add a new row (+) button.

Field Name	Select the name of the field whose values you want to appear in the grid. Available fields are based on the view name or the record name selected in retrieval type section.
-------------------	--

Display Type	<p>Select one of the following to indicate how the Field Name value will be displayed on the grid:</p> <ul style="list-style-type: none"> • <i>Hyperlink</i> Select to enable the user to initiate the transfer by clicking on the field value text. • <i>Long Translate</i> This option is for the display of a string that contains the Long translate (XLAT) value of the field, provided the field is based on a translate table. • <i>Others</i> Select this option to display the value as read-only. • <i>PushButton</i> Select to make the field appear as a button that initiates the transfer. • <i>Related Display</i> This option is for the display of a custom element. • <i>Short Translate</i> This option is for the display of a string that contains the Short translate (XLAT) value of the field, provided the field is based on a translate table.
Label ID	If you want the field to be displayed by its label, select <i>Field Label ID</i> .
Label Type	If you selected Field Label ID, indicate if you want to display the <i>Long Name</i> or <i>Short Name</i> for the field label.
Sequence number	Enter the a number <i>1</i> or greater number to indicate the position of the text field in relation to the other text fields you define.
Description	The system displays the text description specified for the Label ID field. It is not editable here.

Relating Actions to Dynamic Grids

Access the Related Actions page (Set Up CRM, Common Definitions, 360-Degree View, Define Action Category, Related Actions).

Order	*Action Name	Context Required	Disable for Inactive BO	Default	Status	Date Created	Created By
10	Add Child Case	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Active	09/29/2008 10:35AM	IDC-VKUMA
20	Add Interested Party	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Active	09/29/2008 10:37AM	IDC-VKUMA

Add Action

* Required Field

Related Actions page

Order

Enter the number *1* or a greater number to indicate the order in which you want the action to appear in the Actions drop-down list at the top right corner of the dynamic grid page.

Context Required

Select if you want the system to require the user to select a row from the grid when selecting this action. The context itself is specified in the action category to which the action belongs.

When the user clicks the Go button for the Action drop-down list box, the default values defined in the actions are made available in a global record along with the selected rows in the grid. The system then triggers the method associated with the action category.

See [Chapter 18, "Setting Up the 360-Degree View," Defining Action Categories, page 294.](#)

Disable for Inactive BO

Select to prevent the action from being performed on business objects that are inactive.

Default

Select to display the action in the drop-down list.

Status

Select *Active* or *Inactive*. The default is *Active*. Only *Active* actions appear in the Action drop-down list box.

Configuring the 360-Degree View Search Page

To configure the 360-degree view search page, use the User Links (RB_TD_ANON_LINKS) and 360-Degree Search Preferences (RB_TD_USRSRCHPREF) components.

This section provides an overview and discusses how to:

- Define user links that appear on the search page.
- Select the search page that is used to access the 360-Degree View.

Understanding 360-Degree View Search Pages

360-Degree View search pages use the customer identification framework to identify the customer or worker whose information appears on the 360-Degree View. Different 360-Degree View search pages are defined for each of the PeopleSoft CRM industry solutions or markets. You can control which search page a user accesses by setting the user's market preferences.

Additionally, you can create user links (which you click to access a component) that appear on these search pages.

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Using Business Object Search and Quick Create Functionality," Customer Identification

[Chapter 19, "Using the 360-Degree View," Accessing the 360-Degree View, page 339](#)

Pages Used to Configure the 360-Degree Search Page

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
User Links	RB_TD_ANON_LINK_PG	Set Up CRM, Common Definitions, 360-Degree View, User Links, User Links	Define user links that appear on the 360-Degree Search page.
Application Packages Lookup	RB_APPLPKG_PG1	Click the Package Tree Viewer link on the User Links page.	Search for and view the available application packages or classes that PeopleSoft CRM provides.
Search Preferences	RB_TD_USRSRCHPREF	Set Up CRM, Common Definitions, 360-Degree View, Search Preferences, Search Preferences	Select the search page that you use to access the 360-Degree View.

Defining User Links That Appear On the Search Page

Access the User Links page (Set Up CRM, Common Definitions, 360-Degree View, User Links, User Links).

User Links

Base Market

Global

Component Name

RB_TD_360_SRCH

Page Name

RB_TD_AGT_SRCH_FSI

Description

User Links for CRM for Financial Service

User Links page (1 of 2)

User Links

Find

View All

First

1 of 2

Last

*Sequence

1

*Status

Active

*Link Name

Search Cases

Transfer

Market

Menu Name

Menu Bar Name

Item Name

Page Name

Panel Item Name

Mode

Update

Application Class

Class

Class Path Like

Method Name

Portal Content Reference

Portal Name

EMPLOYEE

Portal Object Name

CR_RC_CASE_SEARCH_FSI

Package Tree Viewer

Audit History

* Required Field

User Links page (2 of 2)

Note. Currently, PeopleSoft CRM provides predefined user links for the search pages in the financial industries.

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Base Market	The base market where this user link applies.
Component Name and Page Name	The component and page where this set of user links appears.
Description	The description for this set of user links.

User Links

Define each user link that appears on the search page.

Sequence	Enter a number that the system can use to determine the order in which the user links appear on the page.
Active	Select the status of the user link, either <i>Active</i> or <i>Inactive</i> . Only active user links appear on the page.
Link Name	Enter the link name. This appears on the page as the user link.

For each user link that you define, select the option that defines the action taken when the user clicks the link. Actions are:

Transfer	<p>Select to have the user link transfer to a PeopleSoft CRM component and page that you define.</p> <p>If you select Transfer, use the Market, Menu Name, Menu Bar Name, Item Name (component name), Page Name, and Mode fields to select where you want the user link to take you.</p>
Application Class	<p>Select to have the user link calls a PeopleSoft CRM application class.</p> <p>If you select Application Class, enter the Class, Class Path Like, and Method Name fields to define the application class that the system to call.</p>
Package Tree Viewer	<p>Click to access the Application Packages Lookup page to search for and view the available application packages that PeopleSoft CRM provides. The information that you select on this page appears on the User Links page after you click OK.</p> <p>See Chapter 18, "Setting Up the 360-Degree View," Searching for and Viewing Application Packages, page 315.</p>
Portal Content Reference	<p>Select to have the user link transfer to a PeopleSoft CRM portal page that you define.</p> <p>If you select Portal Content Reference, use the Portal Name and Portal Object Name fields to select the portal page to which you want to transfer.</p>

Selecting the Search Page That Is Used to Access the 360-Degree View

Access the Search Preferences page (Set Up CRM, Product Related, 360-Degree View, Search Preferences, Search Preferences).

Search Preferences

Search Preferences					Customize	Find	First	1-6 of 6	Last
*User's Preferred Market	Default	Component Name	*Page Name						
Communications	<input type="checkbox"/>	RB_TD_360_SRCH	RB_TD_AGT_SRCH_COM		<input data-bbox="1404 535 1429 567" type="button" value="+"/>	<input data-bbox="1453 535 1477 567" type="button" value="-"/>			
Energy	<input type="checkbox"/>	RB_TD_360_SRCH	RB_TD_AGT_SRCH_ENG		<input data-bbox="1404 588 1429 619" type="button" value="+"/>	<input data-bbox="1453 588 1477 619" type="button" value="-"/>			
Financial Services	<input type="checkbox"/>	RB_TD_360_SRCH	RB_TD_AGT_SRCH_FSI		<input data-bbox="1404 640 1429 672" type="button" value="+"/>	<input data-bbox="1453 640 1477 672" type="button" value="-"/>			
Global	<input checked="" type="checkbox"/>	RB_TD_360_SRCH	RB_TD_AGT_SRCH_GBL		<input data-bbox="1404 693 1429 724" type="button" value="+"/>	<input data-bbox="1453 693 1477 724" type="button" value="-"/>			
Government	<input type="checkbox"/>	RB_TD_360_SRCH	RB_TD_AGT_SRCH_GOV		<input data-bbox="1404 745 1429 777" type="button" value="+"/>	<input data-bbox="1453 745 1477 777" type="button" value="-"/>			
Insurance	<input type="checkbox"/>	RB_TD_360_SRCH	RB_TD_AGT_SRCH_INS		<input data-bbox="1404 798 1429 829" type="button" value="+"/>	<input data-bbox="1453 798 1477 829" type="button" value="-"/>			

* Required Field

Search Preferences page

Select the default search page that you want to use to access the 360-Degree View for the different markets. You can define a different search page to access the 360-Degree View for each market.

The system checks the user's preferences to determine the market that is associated with that user and then uses the search preferences that you define on this page to determine the search page that appears when users access the 360-Degree View. If you do not define a market value for the user on the user preferences page, the system uses the search page that is associated with the Global market from this page.

Note. The search preference defaults to the search page that is associated with the Global market.

User's Preferred Market Select a preferred market if it is not already shown on the page.

Default Select to indicate the page that you want the system to display in the selected row when no market preference exists for the user.

Chapter 19

Using the 360-Degree View

This chapter provides an overview of 360-degree views and discusses how to:

- Access the 360-Degree View pages.
- Manage overall activity for a business object.

Understanding the 360-Degree View

This section discusses:

- 360-degree views.
- 360-degree view toolbar.

360-Degree Views

360-degree views provide a summary view of overall activity for a business object—a customer, contact, partner, or worker. From a 360-degree view, you can review or initiate transactions, record interactions and subinteractions, view relationships, and view tasks for the business object.

A 360-degree view page includes these page regions:

<i>Region</i>	<i>Details</i>
Role	<p>This drop-down field lists the roles that are associated with the business object whose information appears on the page. You can select a role to filter data and transactions so that only those that pertain to that role appear in the view.</p> <p>See <i>PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook</i>, "Understanding Business Object Relationship Model Components."</p>

Region	Details
Actions	<p>This field lists the transactions that are defined for the 360-Degree view page. Select the transaction to perform the associated actions or to transfer to the page that performs the desired actions. Transactions populate relevant fields on the transaction page from the data that is identified on the 360-Degree View page.</p> <p>See Chapter 18, "Setting Up the 360-Degree View," Configuring Actions and Transactions for the 360-Degree View, page 293.</p>
Summary	<p>Information such as name, contact information, and customer value appears here. The Summary page region can include up to two buttons that transfer to components that contain more information about the business object. Depending on the 360-Degree View profile configuration, users may be able to modify the person's or company's phone and email data in the CRM database from this section (note that this is not available for all 360-Degree Views, such as those for HR HelpDesk).</p>
Activities	<p>Activities appear in a tree format that contains a record of all transactions, interactions, and subinteractions that involve the business object. Transactions are grouped under nodes. Select a node to view, add, modify, or search for a transaction.</p> <p>The specific nodes that appear on the Activities tree vary depending on the business object and role that you select.</p> <p>Interactions are grouped by date.</p> <p>See Chapter 18, "Setting Up the 360-Degree View," Setting Up the 360-Degree View Tree, page 302.</p>
Date Filter	<p>This field enables you to select a date range that controls which transactions appear in the tree.</p>
<activity> Detail	<p>The information that appears in this area changes depending on which node you select in the activities tree. Summary information about the transactions that are under the node that you select in the 360-Degree view tree appears in this grid.</p> <p>When you first access the 360-Degree View page, the system displays information that is controlled by the default setting that is specified for the page.</p> <p>See Chapter 18, "Setting Up the 360-Degree View," Setting Up the 360-Degree View Tree, page 302.</p>
Log Interaction	<p>Using this group box, you can capture interaction details, record the callback date and time, attach notes to the interaction, and send an email to the customer or internal personnel (if the email address is set up).</p> <p>See Chapter 17, "Working with Interactions," page 271.</p>

Region	Details
Current Actions	This area lists all the transactions that occur during the current interaction or current 360-degree view session.
Relationship Viewer	All of the business object relationships for the customer are accessible from this page. <i>See PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Working with the Relationship Viewer."</i>
Tasks	This page lists all the tasks that pertain to the business object. You can drill down to view the task detail. <i>See Chapter 23, "Working with Tasks," page 417.</i>
Call Reports	This page lists all the call reports that pertain to the business object. You can drill down to view the call report detail. <i>See Chapter 24, "Working with Call Reports," page 445.</i>

The specific information that you see on a 360-Degree View page varies depending on whether you are viewing a customer, contact, site, partner, worker, or human resources help desk (HRHD) worker.

The system records all interactions with the business object and displays them in the Activities section of the 360-Degree View page. An interaction can contain multiple subinteractions. For example, a call with a customer might involve a case being updated, a service order being added, and a note about the customer. All of these subinteractions are logged under the same interaction.

The specific activities and transactions that appear in the Activity Tree page region and Actions drop down box differ depending upon which 360-degree view you access.

You can utilize these types of 360-degree views:

- Customer

The customer 360-degree view is used to manage transactions and activities that relate to customers, sites, and contacts of customers.

- Partner

The partner 360-degree view is used to manage transactions and activities that relate to partners and contacts of partners.

See PeopleSoft Enterprise Partner Relationship Management 9.1 PeopleBook.

- Worker

The worker 360-degree view is used to manage cases and interactions for workers who call the help desk for support.

See PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook.

- Constituent

The constituent 360-degree view is used when integrating with PeopleSoft Campus Solutions to manage cases and activities for individuals who call the service center. In addition to the sections that appear on all 360-degree views, the Constituent 360-degree view includes display-only information about the individual's academic information, if applicable, including checklists, communication, and comments; recruiting; admissions; transfer credits; academics; finances; financial aid; transcript requests; contributor relations; and affiliations.

See *PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook*, "Setup Data."

Three trees are delivered for higher education. Information Technology (IT) related issues are shown in the Higher Education IT Tree while the Higher Education Support Tree is designed to show non-IT related issues. The Higher Education Blended Tree shows both IT and non-IT related issues. The Configure Role page is used to associate a tree with a particular role

- HRHD Worker (human resources help desk worker)

The HRHD Worker 360-degree view is used to initiate transactions and manage activities that relate to the worker's human resources data. In addition to the sections that appear on all 360-degree views, the HRHD worker 360-degree view includes information about the worker's job and position, payroll information, and benefits.

The HRHD 360-degree View page provides security that is based on section-level information only. There is no field-level security. For example, if an agent has access to information for one job and not the other, or the agent only has access to part of the information, the system still retrieves all job information. This enables a true 360-degree view of an employee.

See *PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook* and [Chapter 4, "Setting Up Security and User Preferences," page 49.](#)

Using the 360-Degree View Toolbar

Toolbars are configurable and customizable. In addition, you can give end-users the ability to personalize their own toolbar.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Toolbars."

PeopleSoft Enterprise CRM delivers these buttons for the 360-Degree View toolbar:



Click the Reload button to refresh the information that appears on the 360-Degree View tree.

Note. Clicking this button will not refresh other sections of the page: only the data in the 360-Degree tree itself is reloaded.



Click the New Search button to finish the interaction with the current customer and return to the Search page. Depending on the option that was selected for Callback Interaction when the tree was originally set up, the interaction status is either identified as *Completed* or left open for further activity with the customer.



Click the Notification button to send a notification.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Sending Manual Notifications."



Click the Correspond button to send ad hoc email correspondence.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Sending Correspondence."

Note. This button does not appear for the Company role.



Click the Add to My Contacts button to add the selected contacts to the My Contacts list.



This icon is intended for use only when integrating with PeopleSoft Campus Solutions.

Click the Academics button to transfer to the Career page of the Academics component. This page will be displayed directly if there is only one combination of Institution and Career for the individual on the 360-Degree View page. If there is more than one such combination, the search page for the Academics component will be displayed.



This icon is intended for use only when integrating with PeopleSoft Campus Solutions.

Click the Test Scores button to transfer to the Test Scores page for the constituent.

Return

Click to transfer back to the Contact 360–Degree View page from which you accessed the Company 360-Degree View. This button appears only if you transfer to the Company 360-Degree view by clicking 360–Degree view icon in the summary section of Contact 360–Degree View.

Personalize

Click the Personalize link to personalize the toolbar buttons.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Configuring Toolbars"

Accessing the 360-Degree View

This section discusses how to search for customers in the 360-degree view.

Note. Only the Customer 360-degree view search page is discussed in detail. The search pages that are used to access other 360-degree views are similar in usage.

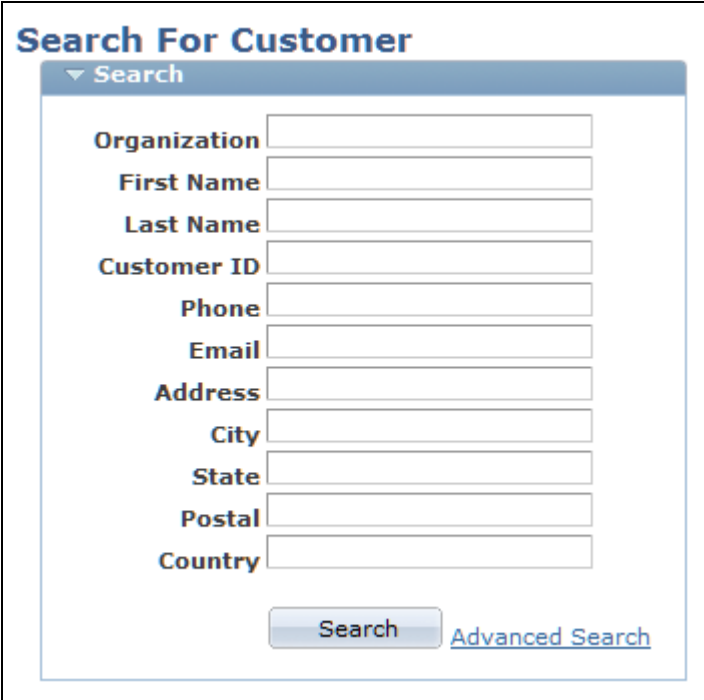
Page Used to Access the 360-Degree View

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Search for Customer	RB_TD_AGT_SRCH_GBL	Customer 360-Degree View, Search for Customer	Search for a customer whose information you want to view.
Search for Customer	RC_HE360_SRH	Constituent 360-Degree View, Search for Customer	Search for a company, contact, worker, or individual consumer (including academic constituent) whose information you want to view.
Search for Partner	RB_TD_AGT_SRCH_PRT	Partner 360-Degree View, Search for Partner	Search for a partner whose information you want to view.
Search for Worker	RC_HD360_SRH	Worker 360-Degree View, Search for Worker	Search for a worker whose information you want to view.
Search for Worker	RC_HRHD360_SRH	HRHD Worker 360-Degree View, Search for Worker	Search for a worker whose human resources information you want to view.

Searching for Business Objects in the 360-Degree View

Access the Search for Customer page (Customer 360-Degree View, Search for Customer), the higher education Search for Customer page (Constituent 360-Degree View, Search for Customer), the Search for Partner page (Partner 360-Degree View, Search for Partner), the Search for Worker page (Worker 360-Degree View, Search for Worker), or the Search for Worker page (HRHD Worker 360-Degree View, Search for Worker).

Note. The Search for Customer page of the Customer 360-Degree View is shown for illustration purposes. The other search pages are similar in usage.



Search For Customer

▼ Search

Organization

First Name

Last Name

Customer ID

Phone

Email

Address

City

State

Postal

Country

[Advanced Search](#)

Search Customers page

Search

You can enter search criteria in any or all of the search fields. The system searches for business objects that match the criteria you enter.

Note. This search uses the customer identification framework.

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Using Business Object Search and Quick Create Functionality," Customer Identification.

Search Results

If more than one match for the search criteria that you enter is found, then all business objects that match the search criteria appear in the Search Results page region. If only one record matches the search criteria, then the 360-Degree View page for that object appears.

Note. The Search for Customer - Search Results page of the Customer 360-Degree View is shown for illustration purposes. The other search results pages are similar in usage.

Select Action Create Company With Contact Go				
Search Results				
Last Name	First Name	Organization	Phone	Email
Pine	Teresa	Easy solutions	925/694-2001	crm_worker_2
Pine	Teresa	Sara Outdoor	925/694-2001	crm_worker_2
Pine	Teresa	Western Pacific Wholesaler	925/694-2001	crm_worker_2

Search for Customer: Search Results page

For business objects that are contacts of either customers or partners, one row appears in the Search Results page region for each customer or partner that the individual represents. The Name column that appears in the row for an individual identifies the company that the individual represents, and the Consumer column identifies the consumer that the individual represents. If both the Name and Consumer columns in a row are blank, then the individual listed in the row is a consumer.

Select Action

Select a role to create from the list of available roles.

The system determines the available roles from the search criteria that you entered. For example, suppose that you enter a value in the Organization field, the available role is *Company*, but if you enter a value in either the First Name or Last Name field, the available roles are the roles that are associated with the individual business object type: *Create Company with Contact*, *Create Consumer*, *Create Consumer with Contact*, or, if appropriate for the 360-degree view being used, *Create Worker*.

To use this functionality, you must have previously set up Quick Create for that object. Once you create the new business object, the system transfers you to the 360-Degree View page automatically, using the newly created business object.

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Using Business Object Search and Quick Create Functionality"

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Using Business Object Search and Quick Create Functionality," Searching for Business Objects

Managing Overall Activity for a Business Object

This section discusses how to manage overall information for a business object.

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Working with the Relationship Viewer"

Chapter 23, "Working with Tasks," page 417

Pages Used to Manage Overall Activity for a Business Object

Page Name	Definition Name	Navigation	Usage
360-Degree View	RB_TD_AGENT_VIEW	<ul style="list-style-type: none"> Customer 360-Degree View, Search for Customer Select an existing customer. Constituent 360-Degree View, Search for Customer Partner 360-Degree View, Search for Partner Select an existing partner. Worker 360-Degree View, Search for Worker Select an existing worker. HRHD Worker 360-Degree View, Search for Worker Select an existing worker. 	Manage overall activity for the business object.
360-Degree View - Relationship Viewer	RB_TD_REL_VIEWER	Access the 360-Degree View page. Select the Relationship Viewer tab.	View the relationships for the business object whose information appears on the 360-Degree View page.
360-Degree View - Tasks	RB_TD_TASK_LIST	Access the 360-Degree View page. Select the Tasks tab.	Maintain the tasks that are associated with the business object whose information appears on the 360-Degree View page.

Page Name	Definition Name	Navigation	Usage
360–Degree View - Call Reports	RD_TD_CR_LIST	Access the 360–Degree View Page. Select the Call Reports tab.	Maintain the call reports that are associated with the business object whose information appears on the 360–Degree View Page.

Managing Overall Activity for a Business Object

Access the 360-Degree View page (Customer 360-Degree View, Search for Customer).

The screenshot shows the '360-Degree View' interface for a customer. At the top, there is a navigation bar with links: Refresh, New Search, Add to My Contacts, CTI Dialout, and Personalize. Below this is a tabbed interface with '360-Degree View', 'Relationship Viewer', 'Tasks', and 'Call Reports'. The '360-Degree View' tab is active. Below the tabs, there is a section for '*Role' (Company) and 'Actions' (Add Case), with a 'Go' button. The main content area is titled 'Summary' and displays customer information for 'Cady Montgomery'. The information includes: Phone (719/554-8632), Email (cadymont@cm.com), Address (5575 White Tail Lane, Colorado Springs, CO, 89456, USA), Segment (Retail), Extension (empty field), Status (Active), and Customer Value (Gold, represented by four stars). An 'Apply Changes' button is located at the bottom left of the summary section.

360–Degree View page (1 of 2)

▼ Activities

*Date Filter 6 - Last Year

First | Previous | Next | Last | Left | Right

- Overview of - Cady Montgomery
 - Global Cases
 - Recommendations - (0)
 - Agreements - (2)
 - Installed Products - (3)
 - Support Cases - (0)
 - Offer History - (0)
 - Defects - (0)
 - Orders - (0)
 - Quotes - (0)
 - RMA's - (0)
 - Service Orders - (0)
 - Leads - (0)
 - Opportunities - (0)
 - Marketing Activities - (4)
 - Interactions - (0)

† Date filter does not apply to this node

▼ Global Cases (Related)

No Global Cases (Related) to display.

► Add Interaction Note

► Current Actions

Refresh | New Search | Add to My Contacts | CTI Dialout | Top of Page

360–Degree View page (2 of 2)

Role

Select a role that is listed for the customer, partner, worker or contact. The profile changes to reflect data that is relevant to that role.

Note. Not all roles of an individual will be displayed on all versions of the 360-Degree View page. For example, the consumer role will not be displayed on the Worker 360-Degree View page or the HRHD Worker 360-Degree View page. If the individual whose information is being viewed in the Worker 360-Degree View page also has a consumer role, use the left hand navigation to open the Customer 360-Degree View page and search again for that individual.

Similarly, the worker role will not be displayed on the Customer 360-Degree View page. If the individual whose information is being viewed in the Customer 360-Degree View page also has a worker role, use the left hand navigation to open the Worker 360-Degree View page and search again for that individual.

Actions

Select the action that you want to perform from the 360-Degree View. Delivered values include *Add Case*, *Add Defect*, *Add Install Product*, *Add Lead*, *Add Opportunity*, *Add Order*, *Add Quote*, *Add Service Order*, *Installed Product Hierarchy*, *Add Quote*, *Add RMA* (return material authorization), *Product Registration*, *Student Service Center*, *Person Profile*, and *Add Case - Admissions Status Inquiry*. The particular actions shown depends on the 360-degree view being used.

Phone, Email, and Extension

Enter new data to update customer, partner, worker, and contact profile information. Click the Apply Changes button to enter and permanently update the changes.

The ability to enter or edit data in these fields is configurable. Users who are not able to edit these fields will still see the existing values listed in display-only format.

Note. On the Constituent 360-Degree View, the labels for phone, email and address may also indicate the corresponding type, such as *Dorm Phone*, *Campus Email*, or *Home Address*.

The following fields appear in the Summary region only for the Constituent 360-Degree View when viewing information for a consumer (academic constituent):



[Family Educational Rights and Privacy Act (FERPA) indicator]

The FERPA indicator icon enables the user to view details about the restrictions that the student has requested regarding the disclosure of certain types of directory information. Clicking the icon transfers the user directly to the Campus Community FERPA page.



[Positive Service indicator] and [Negative Service indicator]



The Positive and Negative Service indicator icons enables the user to view details about the service restrictions or service privileges associated for each indicator. Clicking an icon transfers the user directly to the Manage Service Indicators page in Campus Solutions.



[Affiliations indicator]

Click the Affiliations icon view details regarding the academic constituent's affiliations.

ID

This is the automatically generated ID from Campus Solutions used to identify the constituent within the PeopleSoft Campus Solutions system.

Campus ID

This is the ID selected by the academic institution to identify the constituent (for example, for use on student identification cards).

Current Status

Displays the current academic status for the constituent. Separate statuses are shown for each combination of institution and career for the most recent applicable term. Only the most advanced status is shown for each institution and career combination. The available status values are (from lowest to highest): *Suspect*, *Prospect*, *Applicant*, *Student*, and *Alumnus*.

If the same status exists in multiple institution and career combinations, only that for the most recent status date or source date is shown. If the dates are the same, then only the status from the institution/career in first alphabetical order is shown.

Deceased

This text appears in the summary area if the individual consumer whose information is being viewed is deceased.

If the consumer is deceased, no FERPA, Service Indicator, or Affiliations icons will be displayed for the individual.

Activities

This region contains the 360-Degree View Tree, which displays all activities and interactions with the customer.

Activities are grouped by transaction type. Expand the folder or icon next to a transaction type to view activities for that transaction type.

Depending on the way the system is configured, you can add transactions or search for transactions of a particular type. Click a detail link to access transaction detail or click the activity summary to view a grid that lists summary information about the transactions.

Date Filter

Select the date filter for the activities that you want to view. Values are *1 - Today*, *2 - Yesterday*, *3 - Last Week*, *4 - Last 2 Weeks*, *5 - Last Month*, *6 - Last Year*, and *7 - View All*.

If you select *6 - Last Year* and the tree header has a maximum date filter of *5 - Last Month*, the system stops the user from viewing records that are older than the maximum date filter criteria.

If you select *7 - View All* and you don't enter maximum date filter criteria in the tree header, the system displays all of the records.

When the 360-Degree View page initially appears, the date range that you specify in the profile of the user who is currently accessing the system appears by default. If the user's profile is not available, the system displays the activities for the date range that you specify in the tree. When defining the tree, you specify the date filter and maximum date filter to use when displaying this page.

See [Chapter 18, "Setting Up the 360-Degree View," Setting Up the 360-Degree View Tree, page 302.](#)

From and Through

Enter the date range for the information that you want to see on the 360-Degree View. After you enter the date range, click the Go button.

Note. The system displays the From and Through fields on this page only after you enable data filtering on the 360-Degree View - Personalize page.

Activities Detail

The system displays a dynamic grid that lists key information from the most recent transactions and associated actions for the activity type that you click in the 360-Degree view tree.

The label for this grid changes depending on the type of information you view. For example, when you expand the Agreements node in the 360-Degree view tree, and then click the Active child node, the system displays the Agreements-Active dynamic grid and shows important information from agreement records. It can also provide an action link for further interactions concerning an agreement, such as viewing its details. You can configure the associated actions, the number of transactions, and the columns that appear in this grid.

Note. For performance reasons, a maximum of 100 entries will be retrieved for display in the dynamic grid at any one time.

See [Chapter 18, "Setting Up the 360-Degree View," Defining Dynamic Grids, page 325.](#)

Log Interaction Note

The fields in the Log Interaction section capture the details of an interaction.

Every time that you record a subinteraction on this page, the system groups the subinteractions into one related interaction. You can perform multiple subinteractions for a customer at one time before you leave this page. The subinteractions that you created previously appear in the Current Actions group box.

Note. Interactions that are automatically generated through correspondence management are not related to the values in the drop-down menus on the 360-Degree View page. Interactions that are generated through correspondence management do not appear in reports that track which contact methods are used most often by agents for interactions with customers or contacts through the 360-Degree View page.

Contact Method	Select the contact method for the interaction. Delivered values include <i>Inbound Chat, Inbound Email, Inbound Fax, Inbound Phone, Inbound Web, Outbound Email, Outbound Fax, and Outbound Phone</i> .
Interaction Status	Select the interaction status. Delivered values include <i>Busy, Callback, Child Answered, Completed, Do Not Call Again, In Progress, and No Answer</i> .
Callback Date and Callback Time	Enter a date and time for callback.
Add Note	Enter a note to add to the interaction. The note is saved in the 360-Degree View Tree as a subinteraction.
Email Note	Click to send the note to the customer.

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Person Business Objects"

Viewing Customer Relationships

Access the 360-Degree View - Relationship Viewer page (Access the 360-Degree View page. Select the Relationship Viewer tab).

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Working with the Relationship Viewer."

Maintaining Customer Tasks

Access the 360-Degree View - Tasks page (Access the 360-Degree View page. Select the Tasks tab).

See [Chapter 23, "Working with Tasks," page 417](#).

Part 5

Self-Service for Customers

Chapter 20

Setting Up Customer Self-Service

Chapter 21

Working with Customer Self-Service Transactions

Chapter 20

Setting Up Customer Self-Service

This chapter provides an overview of customer self-service features for PeopleSoft CRM Order Capture and discusses how to:

- Set up guest IDs to access self-service sites.
- Set up user registration features.
- Set up Contact Us features.
- Set up product registration.

Understanding Customer Self-Service Setup

This section discusses:

- Self-service sites.
- Self-service user registration.
- Contact Us notifications.
- Product registration.

Self-Service Sites

Several aspects of a self-service site are controlled by characteristics of the user ID that provides site access. When users first access a site, they are logged on to the site with a guest ID. This guest ID is specified in the site's configuration properties file or defined on the query string of the uniform resource locator that one uses to access the site. By setting up multiple guest IDs with different characteristics, you can create multiple self-service sites.

For example, you may want to create an English site and a Spanish site. Or you may want to create a European site that uses a European business unit, and a U.S. site that uses a U.S. business unit. You might even want to create multiple European sites that use different languages but that all point to the same European business unit. To accomplish all of this, create multiple guest IDs with the appropriate characteristics.

If you set up multiple guest IDs, the self-service sign in page enables users to switch between guest IDs. For example, if you set up guest IDs for different languages and use language names as IDs descriptions, then visitors can select from a list of languages. The system stores the label for the field that visitors use to select a guest ID in the message catalog to make it easy for you to change the label to suit your business needs.

Site Branding

You can create distinctive Web sites for your company's self-service sites by setting them up as branded sites. Use PeopleSoft Enterprise Portal Pack to quickly implement a portal with your own "look and feel," or branding.

See Also

PeopleSoft Enterprise CRM Portal Pack 9.1 PeopleBook, "Getting Started with PeopleSoft Enterprise CRM Portal Pack"

Self-Service User Registration

A self-service user registers in one of these three ways, each of which is secured differently:

1. Existing customer.

Customers who already exist in the system can add a self service user login for their account. To do so, they must enter information that you define to identify them as a current customer. After the system verifies their status, they must enter only a password to establish a self-service user ID. The system obtains other information from their existing customer record.

2. New customer.

This is for new self service users who can be consumers or businesses. You must set up a guest account to handle each type of user that might register for self service because new user logins take their defaults from the guest account.

Security is controlled by the privileges that you establish and assign to guest user IDs. A user first signs on using a guest ID that you provide. When the user registers, the system clones the currently active guest ID and all its access privileges to create the new user ID, and then creates the necessary customer or consumer record in the CRM database.

3. Contact of an existing customer company.

A contact of an existing company can register as a business user who represents a customer company by entering a key that you define and provide to them.

To register, users are required to read and accept terms of service and a privacy policy that you set up.

User Passwords and Password Hints

A user can add a password hint question and answer when they register. This enables users who forgot their passwords to request new passwords after answering a hint question. A user can also change their password hint.

To enable this feature, you must set up forgotten password email text at the system level. Additionally, the user must:

- Have a primary email address.
- Establish a password hint during registration or through the Name and Sign In maintenance pages.

- Be associated with a permission list that permits the password to be emailed.

PeopleSoft CRM uses logic that is provided by PeopleTools to store the hint and answer, verify the hint that the user enters, and email the new password to the user.

See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*

See Also

Chapter 4, "Setting Up Security and User Preferences," *Implementing Self-Service Security*, page 98

Contact Us Notifications

Registered users (but not guest users) use the Contact Us page to send messages to you. When customers send messages, they select from a list of subjects and topics (subcategories of subjects) that you define to identify the message subject. When the customer submits the message, the system:

- Captures the message as an interaction that is visible through the 360-Degree View and other interaction lists.
- Notifies designated people that the message is submitted.

The system determines whom to notify based on the workflow action that you associate with the subject and topic of the message. The workflow action also determines whether notifications are sent to worklists or to email addresses.

Worklist notifications automatically include a link to the Interaction page; email notifications include a link only if the email template is so configured. The PeopleSoft-delivered CONTACT US FORM email template includes this link.

To take maximum advantage of interaction functionality, use the 360-Degree View to manage all follow-up communications. Using the 360-Degree View ensures that the system captures all follow-up communications as interactions. A direct email response bypasses the system and is not captured as an interaction.

Contact Us Chat

If the self-service page is enabled, , a registered self-service customer can request a live chat. This request opens the customer chat window, a browser-based window that does not require a client install or applet download.

Agents receive chat requests through the MultiChannel Console, which enables them to manage multiple simultaneous chat sessions. When an agent accepts a chat request, the agent chat window opens. Agents can conference peers and supervisors into the chat, and transfer chat sessions to other agents or queues. Agents can also initiate chats with other agents on their buddy lists.

See Also

PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook, "Working with Chat in PeopleSoft Enterprise CRM"

Product Registration

Self-service users can register products online through PeopleSoft Customer Self-Service and 360-Degree View. When a customer signs in and selects to register a product, the system populates the Product Registration page with two lists:

- Existing products

The Existing Products section of the Product Registration page lists installed products that are already registered and their registration dates. Users click a registered product link to update the registration information or select an unregistered product to register.

- New products

Contains product catalogs, a product list, or both. The customer uses these to locate the product to register. In addition to registering products that already have installed products that are created for them, users can also use product catalogs to register new products. Product catalogs group products in a hierarchical fashion, which provides simple navigation for users to locate new products. As an administrator, you select product catalogs from the system to appear in the New Product section of the Product Registration page. Users can then drill down on any listed catalog to look for the products they want to register without having to remember and enter product names. You can also set up new catalogs that are specific for product registration. When users submit the registration, the system creates new installed products with the *Installed* status for products that users select from the new product list. For registered products, users select from the existing product list. The system updates the associated installed products with the information (date of registration, serial ID, and so on) that it collects from the product registration. You can specify what installed product fields are available for display or editing on the Product Registration - Product Registration Details page. You can also configure the system to display only installed products of certain statuses. This enables you to limit the registration process to installed products for which product registration makes sense; for example, if you don't want users to register an installed product that is canceled or uninstalled. Only registered users can register products through PeopleSoft Customer Self-Service.

Note. If the quantity of an installed product is greater than one, and they are under different statuses, the installed product appears in the Existing Products section if any one of those statuses is in the status list that you specify on the Product Registration Setup page.

Product Registration Using the 360-Degree View

Customer service representatives (CSRs) can register products for customers through the 360-Degree View. CSRs can view and update any existing installed products or select *Product Registration* in the Go To field on the page to register products for customers who call them on the phone.

See Also

[Chapter 4, "Setting Up Security and User Preferences," Implementing Self-Service Security, page 98](#)

[Chapter 20, "Setting Up Customer Self-Service," Setting Up Product Registration, page 359](#)

[Chapter 21, "Working with Customer Self-Service Transactions," Registering Products, page 398](#)

Setting Up Guest IDs to Access Self-Service Sites

This section discusses how to:

- Define guest IDs.
- Change the label of the guest ID selection field.

Defining Guest IDs

To define a guest ID:

1. Define the ID in the PeopleTools User Profiles component.

Access the User Profiles component from PeopleTools, Security, User Profiles, User Profiles.

On the General page, enter the language code that is associated with the ID. Anyone who logs on with a guest ID sees all of the pages that are in the associated language code.

On the ID page, enter the description that self-service users see in the guest ID selection field. For example, if you support multiple languages and you define language-based user IDs, the descriptions might be the language names.

See *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*

2. Establish the ID as a guest ID on the User Registration Setup page.

Access the User Registration Setup page from Set Up CRM, Security, Self Service, User Registration.

This is the step that makes the ID into a guest ID that enables personal and business user registration. That is, the self-service Sign In page enables users to select from IDs that have a user registration definition.

See [Chapter 4, "Setting Up Security and User Preferences," Implementing Self-Service Security, page 98.](#)

3. Define preferences for the guest ID on the User Preferences page.

Access the User Preferences page from Set Up CRM, Security, User Preferences.

Select a default business unit and market for the guest. If you do not select a business unit, the system uses the default PeopleSoft Order Capture business unit (as established on the Order Capture Definition page).

See [Chapter 4, "Setting Up Security and User Preferences," Defining Overall Preferences, page 89.](#)

See Also

PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook, "Defining Order Capture Business Units"

Changing the Label of the Guest ID Selection Field

To change the label of the guest ID selection field:

1. Access the message catalog from PeopleTools, Utilities, Administration, Message Catalog.
2. Look up message set number 18068, whose description is *Self Service Common*.
3. Click Find and enter message number 19 in the search string.

The field label text appears. The default is *Select a different site to browse*.

4. Enter an alternative label for the guest ID selection field.

For example, if the guest IDs are for different languages, you might enter *Select a language*.

5. Save the changes.

Setting Up Contact Us Features

To set up contact us features, use the Contact Us Topic (SUBJECT_TABLE) and Contact Us Subject (SUBJECT_TOPIC_TBL) components.

This section lists prerequisites and discusses how to:

- Specify chat features for Contact Us pages.
- Define topics.
- Define subjects and Contact Us workflow.

Prerequisites

When customers use the Contact Us page to communicate with you, they select from a predefined list of subjects and topics. When they submit the message, the system sends a notification to a designated person. You set up this workflow for each subject and topic combination that you define.

Before you create subjects and topics, you must define the workflow actions and workflow email templates that are to be used for these notifications.

Customers can also elect to open a chat with a customer service representative if you have enabled the chat feature and specified a chat profile and agent popup for on the self-service page.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Setting Up PeopleSoft CRM Workflow," Defining Workflow Actions for Business Projects

PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook, "Working with Chat in PeopleSoft Enterprise CRM"

Pages Used to Set Up Contact Us Features

Page Name	Definition Name	Navigation	Usage
Chat Enabled Page Setup	RB_CHAT_ADMIN	Set Up CRM, Product Related, Multichannel Definitions, Chat, Chat Page Setup, Chat Enabled Page Setup	Specify chat features for Contact Us pages.
Contact Us Topic	CONV_SUB_TOPIC_TBL	Set Up CRM, Common Definitions, Contact Us, Contact Us Topic, Contact Us Topic	Define topics that customers select when requesting that you contact them.
Contact Us Subject	SUBJECT_TABLE	Set Up CRM, Common Definitions, Contact Us, Contact Us Subject, Contact Us Subject	Define subjects that customers select when requesting that you contact them, and set up workflow for each subject.

Specifying Chat Features for Contact Us Pages

Access the Chat Enabled Page Setup page (Set Up CRM, Product Related, Multichannel Definitions, Chat, Chat Page Setup, Chat Enabled Page Setup).

Chat Enabled Page Setup

Self Service Page RB_CATALOG

***Description** Customer Self-service Browse Catalog Page

List of Self-Service Pages								Customize	Find	View All	First	1 of 1	Last
Enable Chat Automation	Component	Market	Template ID	Chat Profile		Agent Popup Page							
<input type="checkbox"/>	RB_CATALOG	GBL		CHAT_DEMO	Chat Profile	MiniNav	Agent Popup						

Add Component

Chat Enabled Page Setup page

See Also

PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook, "Working with Chat in PeopleSoft Enterprise CRM"

Defining Topics

Access the Contact Us Topic page (Set Up CRM, Common Definitions, Contact Us, Contact Us Topic, Contact Us Topic).

Contact Us Topic

SetID CRM01

Contact Us Topic QUESTION

Contact Us Subject Topic

*Description CRM Product Line

Contact Us Topic page

Specify a topic and topic description. You associate the topics with Contact Us subjects to enable users to select the subject and topic for a particular Contact Us request.

Defining Subjects and Contact Us Workflow

Access the Contact Us Subject page (Set Up CRM, Common Definitions, Contact Us, Contact Us Subject, Contact Us Subject).

Contact Us Subject

SetID CRM01

Contact Us Subject PRODQUEST

Subject Find | View All First 1 of 1 Last

*Effective Date 11/06/2001

*Description General Product Question

Subject Detail Find | View All First 1 of 1 Last

Contact Us Topic QUESTION

Email Template Contact Us

Workflow Action ContactUs

Contact Us Subject page

When you define a subject, specify the associated topics and the workflow objects (a workflow action and correspondence template) that the system uses to deliver the customer's request to a particular worklist.

Effective Date	Enter the effective date of the email template data.
Description	Enter a description of the subject (up to 36 characters).
Contact Us Topic	Select topics to associate with this subject.
Email Template	<p>For each subject and topic combination, select the correspondence template that the system uses to create the text in its email notifications. Delivered templates are <i>Contact Us</i> and <i>Contact Us Confirmation</i>.</p> <p>Use the correspondence management framework to define correspondence templates and packages for use in the Contact Us feature. To add new templates, make sure that the <i>Contact Us</i> usage is specified in their associated template packages.</p>
Workflow Action	For each subject and topic combination, specify the workflow action that the system uses to send a notification that alerts a worker to the newly submitted message.

Setting Up Product Registration

To set up product registration features, use the Product Registration (RF_PROD_REG_SETUP) table.

This section discusses how to set up product registration features.

See Also

[Chapter 20, "Setting Up Customer Self-Service," Product Registration, page 354](#)

[Chapter 21, "Working with Customer Self-Service Transactions," Registering Products, page 398](#)

Pages Used to Set Up Product Registration for Self-Service Users

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Product Registration Setup	RF_PROD_REG_SETUP	Set Up CRM, Common Definitions, Product Registration, Product Registration Setup	Configure the registration page for installed products.
Catalogs	RF_PROD_REG_SETUP2	Set Up CRM, Common Definitions, Installed Product, Product Registration, Catalogs	Select product catalogs that self-service users can use to search for and register products.

Configuring Installed Product Registration

Access the Product Registration Setup page (Set Up CRM, Common Definitions, Installed Product, Product Registration, Product Registration Setup).

Product Registration Setup
Catalogs

SetID IPROD

Installed Product Statuses
Customize | Find | | First 1-3 of 3 Last

*Installed Product Type	Status		
Product	Installed		+ -
Product	Pending		+ -
Product	Shipped		+ -

Registration Fields
Customize | Find | | First 1-6 of 6 Last

Name	Field	Modifiable		
Comments	COMMENTS254	<input checked="" type="checkbox"/>	+ -	
Purchase Date	INSTALLED_DATE	<input checked="" type="checkbox"/>	+ -	
Physical Location	LOCN	<input checked="" type="checkbox"/>	+ -	
Date Registered	REGISTERED_DATE	<input checked="" type="checkbox"/>	+ -	
Serial ID	SERIAL_ID	<input checked="" type="checkbox"/>	+ -	
Site ID	SITE_ID	<input checked="" type="checkbox"/>	+ -	

Product Registration Setup page

Installed Product Statuses

Specify the statuses for which installed products (that belong to the self-service user) appear in the Existing Products section of the Product Registration page.

Note. Product registration setup is keyed to setID.

Status Select the status for installed products to appear on the Product Registration page.

Registration Fields

Define the installed product fields that appear to self-service users on the Product Registration Details page and whether the fields are modifiable or read-only. The system uses this information as default values on the Installed Product page of the Product Definition component. When a product requires a different set of fields to appear to self-service users, you can override the default fields in the Product Definition component.

Name	Select the field to appear on the Product Registration Details page. Values are <i>Account Number, Agreement Code, Asset Subtype, Asset Tag, Authorization Code, Comments, Date Registered, Department, Distributor, Distributor Contact, Environment, Install Type, Item Shipping Date, Network, Operating System, Operating System Version, Order Date, Ownership, Physical Location, Platform, Purchase Date, Serial ID, Site ID, and User Interface</i> . The system uses this value as the name of corresponding fields that you see on the registration page.
Modifiable	Select to enable users to modify the corresponding field. Clear this check box for fields that need to be read-only when updating previously registered products on the Product Registration Details page. When registering a product for the first time, users can modify all fields except the product description and the registration date, whether or not you select this check box.

Specifying Registration Catalogs

Access the Catalogs page (Set Up CRM, Common Definitions, Installed Product, Product Registration, Catalogs).

The screenshot displays the 'Product Registration Setup' interface with the 'Catalogs' tab selected. At the top, there is a search bar containing 'SetID IPROD'. Below this is a table titled 'Registration Catalogs' with columns for '*Catalog', 'Description', and two action buttons (+ and -). The table lists four catalogs: 303 Cold Storage Unit Catalog, 304 Accessories and Parts, 305 International Catalog, and 306 Commercial Appliances. Above the table, there are navigation links: 'Customize', 'Find', 'First', '1-4 of 4', and 'Last'.

*Catalog	Description		
303	Cold Storage Unit Catalog	+	-
304	Accessories and Parts	+	-
305	International Catalog	+	-
306	Commercial Appliances	+	-

Catalogs page

Catalog	Select a product catalog that self-service users can access in the New Product section of the Product Registration page.
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Chapter 21

Working with Customer Self-Service Transactions

This chapter provides an overview of customer self-service and discusses how to:

- Sign in to PeopleSoft CRM self-service.
- Register as a personal or business user.
- Select the customers that business users represent.
- Maintain name and sign-in information.
- Maintain contact information.
- Maintain contact address books.
- Maintain consumer contact and address information.
- Maintain consumer address books.
- View internal contacts.
- Send Contact Us messages.
- Register products.

Note. You can access several of the pages that are discussed in this chapter from the pagelets in PeopleSoft CRM Portal Pack.

See Also

PeopleSoft Enterprise CRM Portal Pack 9.1 PeopleBook, "Working with PeopleSoft CRM Self-Service Pagelets"

Understanding Customer Self-Service

Self-service transactions enable customers to access information and transact business online. PeopleSoft CRM provides transactions for self-service users to:

- Register and sign in.

- Maintain their user profile (information about themselves and their relationship with you).
- Send messages to you or to chat live online with a customer service representative (CSR).
- Register products.
- Perform application-specific functions such as ordering products and submitting support cases.

This chapter describes how users register, sign in, maintain their profiles, contact you, and register products. It also discusses the differences between self-service for consumers (personal users) and for contacts (business users). Application-specific transactions are described in the corresponding application PeopleBooks.

See Also

PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook, "Working With Order Capture Self Service"

PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook, "Working with Self-Service Application Transactions"

Self-Service Access for Higher Education

The CRM system exposes several self-service components and pages in the employee portal to make some of the self-service features available to Higher Education users in a non-self-service environment. These self-service objects are:

- Sign In page.

See [Chapter 21, "Working with Customer Self-Service Transactions," Signing In to PeopleSoft CRM Self-Service, page 367.](#)

- Contact Us page.

See [Chapter 21, "Working with Customer Self-Service Transactions," Sending Contact Us Messages, page 397.](#)

- Customer Registration page.

See [Chapter 21, "Working with Customer Self-Service Transactions," Registering as an Existing Customer, page 372.](#)

- Contact Directory (internal contacts) page in the Service Center folder.

See [Chapter 21, "Working with Customer Self-Service Transactions," Viewing Internal Contacts, page 396.](#)

- Change Profile Info component in the Manage Profile folder.

See [Chapter 21, "Working with Customer Self-Service Transactions," Maintaining Name and Sign-In Information, page 374.](#)

- Default Addresses component in the Manage Profile folder.

See [Chapter 21, "Working with Customer Self-Service Transactions," Maintaining Contact Information, page 376.](#)

- Address Book component in the Manage Profile folder.

See [Chapter 21, "Working with Customer Self-Service Transactions," Maintaining Consumer Address Books, page 393.](#)

Roles and Permission Lists

The system delivers new roles and permission lists that grant self-service page access to Higher Education users in the employee portal.

Role Update

New roles are created and need to be assigned to Higher Education user IDs in order to access self-service pages in the employee portal. These roles are:

- *HE Self Service - Common* role.

The system assigns this role to all delivered Higher Education user IDs (with the SSS prefix) except for marketing-specific ones.

- *HE Self Service - Profile* role.

Assign this role to user profiles for suspect prospect users. By default, this role is assigned to the delivered SSS_SUSP_PROSP user ID.

This role is associated with the CRHE1610 permission list.

- *HE Self Service - Faculty* role.

Assign this role to user profiles for faculty users to ensure proper page access, for example, the Faculty Center, Internal Contacts page and the Contact Us page. By default, this role is assigned to delivered user IDs such as SSS_AA00100 and SSS_FACULTY.

- *HE Self Service - Student* role.

Assign this role to user profiles for student users and applicant users to ensure proper page access, for example, the Student Center, Internal Contacts page and the Contact Us page. By default, this role is assigned to delivered user IDs such as SSS_AA00100 and SSS_CONST.

Permission List Update

Permission lists are created and updated to grant page access to Higher Education users. Permission lists relate to user IDs through roles.

- CRHE1600 (HE Service Center Self Service) permission list: updated to include CRM_PORTAL_COMPONENTS (CRM Portal Components) menu. In this menu, Internal Contacts (WC_CONTACT_DIR_COMP) and Contact Us (WC_CONTACT_US) will be authorized

- CRHE1610 (HE Manage Profile Self Service) permission list: newly added. Includes the RB_SELF_SERVICE (CRM Self-Service) menu.

Self-Service Page Visibility

This table shows, as delivered, the self-service components and page that are visible in the employee portal by user type:

User Type	Sign In page	Contact Us page	Customer Registration page	Manage Profile folder	Internal Contacts page	Student Center	Faculty Center
Self service guest (sample user ID: <i>USGUEST</i>)	Y	Y	Y	Y	N	N	N
Administrator (sample user ID: <i>PS</i>)	Y	Y	Y	Y	Y	Y	Y
Suspect (sample user ID: <i>SSS_SUSP_PROSP</i>)	N	Y	N	Y	Y	N	N
Prospect (sample user ID: <i>SSS_SUSP_PROSP</i>)	N	Y	N	Y	Y	N	N
Student (sample user ID: <i>SSS_CONST</i>)	N	Y	N	N	Y	Y	N
Applicant (sample user ID: <i>SSS_CONST</i>)	N	Y	N	N	Y	Y	N
Faculty (sample user ID: <i>SSS_FACULTY</i>)	N	Y	N	N	Y	N	Y
Student and Faculty (sample user ID: <i>SSS_AA00100</i>)	N	Y	N	N	Y	Y	Y

See *PeopleSoft Enterprise CRM 9.1 for Higher Education PeopleBook*, "Getting Started with PeopleSoft CRM for Higher Education."

Signing In to PeopleSoft CRM Self-Service

This section discusses how to sign in to PeopleSoft CRM self-service.

Pages Used to Sign In to PeopleSoft CRM Self-Service

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Sign In	RX_LOGIN	Sign In, Sign In	Sign in to PeopleSoft CRM self-service.
Forgot Password	RX_EMAIL_PSWD	Click the Lookup Password Hint link on the Sign In page.	Request a password hint.
Forgot Password - Email New Password	RX_EMAIL_PSWD2	Click the Continue button on the Forgot Password page.	Answer a password hint question to complete the request for a new password.
Confirmation	RX_EMAIL_PSWD_CNFR	Click the Email New Password button on the Forgot Password - Email New Password page.	Confirm that passwords are reset and mailed.

Signing In to PeopleSoft CRM Self-Service

Access the Sign In page (Sign In, Sign In).

Sign In

If you are a new user, select a registration link and register for your UserID and Password.
If you are an existing user, sign in by entering your UserID and password below.

Returning Users

Enter User ID and Password.

User ID

Password

Forgot your password? [Lookup Password Hint](#)

Existing Customer without Sign In ?
[Create Sign In](#)

New Users

[Personal User Registration](#)
Register here to establish a personal account.

[Business User Registration](#)
Register here to establish a business user account. This requires a company code and key and allows you to register under your company's account.

Website

Current website Guest - US001

***Select a website**

Sign In page

Note. In addition to the self-service application, this page is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

See [Chapter 21, "Working with Customer Self-Service Transactions," Self-Service Page Visibility, page 366.](#)

Returning Users

Enter the User ID and Password and click the Sign In button.

If you are already set up as a customer in the CRM system but do not have a self service sign-in, click the Create Sign In link to authenticate yourself as an existing user and create a new self service user ID and password.

New Users

You can register as a personal or business user.

Either personal or business user registration causes the system to create a user ID that is associated with the new consumer or contact record, which the visitor can use to sign in on subsequent visits. The user ID is cloned from the guest ID that was active when the user registered. Menu navigation options, and in some cases, page appearances depend on the user's role or roles.

Personal User Registration

Click this link to establish a personal user ID. When a site visitor registers as a personal user, the system creates a consumer record for that user.

Business User Registration

Click this link to establish an ID as a contact for a company that is already set up in PeopleSoft CRM. When a site visitor registers as a business user, the system creates a contact record that is associated with the customer that the visitor specifies. Visitors must provide customer codes and keys that their site administrators give them for authentication purposes.

Website

When users first access the site, they are automatically logged in using the guest ID that you identify in the configuration properties file. As long as that ID has the appropriate permissions, users can use the site with limited access. Then, users can sign in with their own user IDs and passwords to further identify themselves and acquire additional access.

For example, users who access the site as guests can access the product catalog but cannot view order statuses. Once the users sign in, they can access both the product catalog and order statuses. Even after users sign in with their own user IDs, the guest ID controls certain site characteristics such as the site language.

Select a website

Select a value to switch to a different ID. Depending on how you define guest IDs, the IDs may control the site language, the business unit whose data appears, or other site characteristics. You can change the delivered field label to more accurately reflect the guest ID options that you establish (for example, the Select a Location field with *United States*, *European Market*, and *Asia* values. If you have only one site, you can hide this section from the user).

See Also

Chapter 21, "Working with Customer Self-Service Transactions," Registering As Personal or Business Users, page 370

Chapter 20, "Setting Up Customer Self-Service," page 351

Requesting New Passwords

Access the Forgot Password page (click the Lookup Password Hint link on the Sign In page).

To request a new password, enter your user ID and click Continue.

Completing Requests for New Passwords

Access the Forgot Password - Email New Password page (click the Continue button on the Forgot Password page).

You must correctly answer a personalized password hint question before the system creates and sends a new password.

Email Address

The system displays your primary address, which is the address to which the system sends the new password.

Email New Password Click after entering an answer to complete the request.
After you click this button, a confirmation page appears.

Registering As Personal or Business Users

This section discusses how to register as either a personal or business self-service user.

Pages Used to Register As Personal or Business Users

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Sign In	RX_LOGIN	Sign In, Sign In	Sign in to PeopleSoft CRM self-service.
Personal User Registration	RX_REGISTER	Click the Personal User Registration link on the Sign In page.	Register as a personal user.
Business User Registration	RX_REGISTER_REPCHK	Click the Business User Registration link on the Sign In page.	Identify the company for a business user.
Register as a business user for <company>	RX_REGISTER_REP	Click the Continue button on the Business User Registration page.	Register as a business user.
Customer Registration	RX_REGISTER_CSTCHK	<ul style="list-style-type: none"> Click the Create Sign In link on the Sign In page. Customer Registration, Customer Registration (in the employee portal for Higher Education users). 	Register as an existing customer.
Customer Registration	RX_REGISTER_CST	Click the Continue button on the Customer Registration page.	Enter user ID and password information to complete the process of registering as an existing customer.
Partner Registration	RX_REGISTERPARTNER	Partner Registration	Register a partner company.
Registration Confirmation	RX_REGISTER_CNFRM	Click the Submit Registration button on the Registration page or the Register as a business user for <Your Company> page.	Review registration information.

Registering As a Personal User

Access the Personal User Registration page (click the Personal User Registration link on the Sign In page).

Personal User Registration

To register, complete the form below.

Sign In Information

*User ID

MFONG

*Password

•••••

*Confirm Password

•••••

*Password Hint Question

Mother's maiden name

*Password Hint Answer

Lee

*Email Address

mfong@xxx.com

*Email Type

Home

Personal User Registration page (1 of 2)

Your Contact Information

*First Name

Mary

Middle Name

*Last Name

Fong

*Address Type

Business

*Country

United States

Address 1

2 Main Street

Address 2

Address 3

City

Pleasantville

County

State

Arizona

Postal

64902

*Phone Type

Business

Int'l Prefix

*Phone

612-555-1212

Extension

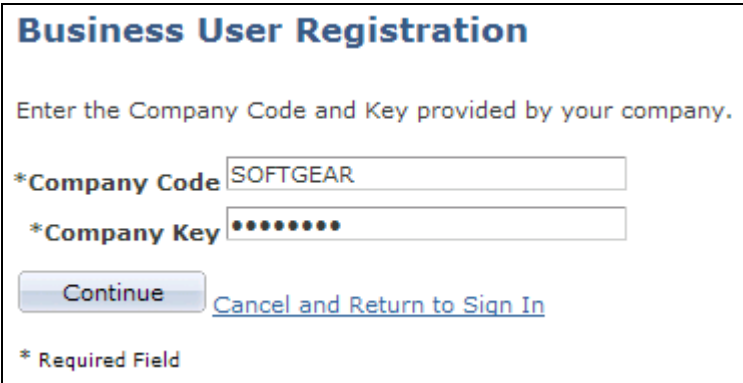
Personal User Registration page (2 of 2)

When you click the Submit Registration button, the system creates a new user ID and a new consumer record.

If a terms of service and privacy policy are set up for the self-service site, additional text containing links to these policies appears on this page. Be sure to read the terms of service and privacy policy before submitting the registration. By submitting the form, you are legally consenting to the terms in these documents.

Identifying Companies for Business User Registration

Access the Business User Registration page (click the Business User Registration link on the Sign In page).



Business User Registration

Enter the Company Code and Key provided by your company.

*Company Code

*Company Key

[Cancel and Return to Sign In](#)

* Required Field

Business User Registration page

Set up keys on the Business User Registration Setup page. You give customers their company codes and keys, and they share the information with users whom they want to register under their company codes.

When a user registers, the new contact record is associated with the company that you specify on this page.

Note. When you set up a key, you can limit the number of times that it is used.

See Also

Chapter 4, "Setting Up Security and User Preferences," Registering Business Users, page 104

Registering As a Business User

Access the Register as a business user for <company> page (click the Continue button on the Business User Registration page). This page is similar in usage to the page for registering as a personal user.

See Chapter 21, "Working with Customer Self-Service Transactions," Registering As a Personal User, page 371.

Registering as an Existing Customer

Access the Customer Registration page (click the Create Sign In link on the Sign In page).

Customer Registration

Enter security information to identify yourself as an existing customer and click Continue.

Security Information

*Email Address

*First Name

*Last Name

[Cancel and Return to Sign In](#)

* Required Field

Customer Registration page

Note. In addition to the self-service application, this page is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

See [Chapter 21, "Working with Customer Self-Service Transactions," Self-Service Page Visibility, page 366.](#)

If you already exist in the PeopleSoft CRM system as a customer or contact, you can register as a self-service user. You must enter information that identifies you to the PeopleSoft CRM system before you can complete the self-service registration process.

The fields that are available for entry on this page depend on how the user registration for existing customers is set up.

Continue	Click this button to access a page where you enter sign in information, including user ID and password.
-----------------	---

Reviewing Registration Information

Access the Registration Confirmation page (click the Submit Registration button on the Registration page or the Register as a business user for <Your Company> page).

One of two buttons appears here, depending on what you were doing before you registered. Click Continue Shopping to access the product catalog. Click Checkout to go directly to the checkout page.

The Continue button is not visible on the page for Higher Education users who access the page in the employee portal, the Continue button is not visible.

Selecting the Customers That Business Users Represent

This section discusses how to select customers.

Page Used to Select the Customers That Business Users Represent

Page Name	Definition Name	Navigation	Usage
Customer Selection	CUST_SELECT	Customer Selection, Customer Selection	Select customers for the current session. This page is available for users that are set up as brokers who buy for multiple companies.

Selecting Customers for the Current Session

Access the Customer Selection page (Customer Selection, Customer Selection).

Customer Selection

You are currently representing University of Computer Science.

Select the customer you want to represent.

Customer List	
Customer Name	
Benicia Unified School District	Select
Bob Johnson	Select
Global Payment Network	Select
MMA Property Management Group	Select
University of Computer Science	Current Selection

Customer Selection page

Select a customer from the customer list.

Maintaining Name and Sign-In Information

This section discusses how to:

- Review name and sign-in information.
- Change names.
- Change passwords.
- Change password hints.

Note. This process is the same for consumers and contacts.

Pages Used to Maintain Name and Sign-In Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Manage Profile - Change Profile Info	RX_NAME_SIGNIN	Manage Profile, Change Profile Info	Review and edit name, password information, and privacy preferences.
Manage Profile - Change Name	RX_NAME_CHNG	Click the Change Name button on the Manage Profile - Change Profile Info page.	Update name information.
Manage Profile - Change Password	RX_PSWD_CHNG	Click the Change Password button on the Manage Profile - Change Profile Info page.	Enter passwords.
Profile - Change Password Hint	RX_HINT_CHNG	Click the Change Password Hint button on the Manage Profile - Change Profile Info page.	Enter password hints.
Manage Profile - Change Privacy Preference	RX_PREF_CHNG	Click the Change Preferences button on the Manage Profile - Change Profile Info page.	Select privacy options for screening communications.

Reviewing Name and Sign-In Information

Access the Manage Profile - Change Profile Info page (Manage Profile, Change Profile Info).

Manage Profile

Change Profile Info

A summary of your profile is displayed below. Click the relevant Change button to make profile edits.

Name
First Name Jennifer
Middle Name
Last Name Gray
[Change Name](#)

Password
User ID USGUEST
Password *****
[Change Password](#)

Password Hint
Password Hint Question
Password Hint Answer
Email Address jgray@yahoo.com
[Change Password Hint](#)

Contact Preferences
Privacy ☐ Do Not Contact
☐ Do Not Email
☐ Do Not Call
☐ Do Not Mail
[Change Preferences](#)

[Return to Manage Profile](#)[Terms of Service](#) [Privacy Policy](#)

Manage Profile - Change Profile Info page

Note. In addition to the self-service application, this page is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

See [Chapter 21, "Working with Customer Self-Service Transactions," Self-Service Page Visibility, page 366.](#)

Maintaining Contact Information

This section discusses how to maintain contact information.

Pages Used to Maintain Contact Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Manage Profile - Default Addresses	RX_PROFILE_DFLT	Manage Profile, Default Addresses	Manage default mailing, shipping, and billing address information.
Manage Profile - Contact Information	RX_ADR_MY_INFO	Click the Change Contact Information button on the Manage Profile - Default Addresses page.	Update primary contact information.
Address Book - Create New Address Address Book - Update Address	RX_ADR_CUST_ADDR	Click the Edit link for an existing address or the Add New Address button on the Profile - Contact Information page.	Create or update addresses that are associated with the user.
Delete Confirmation	RX_ADR_DEL_CONFIRM	Click the Delete link for any non-primary address, phone number, or email address on the Profile - Contact Information page.	Confirm the deletion of the address, phone number, or email address.

Accessing Default Address Information

Access the Manage Profile - Default Addresses page (Manage Profile, Default Addresses).

Manage Profile

Default Addresses

Primary Contact Information
Address 2250 Lafayette Centre Drive
Chantilly, VA 20151
United States
Phone 932/156-1124
Email Address Davisclarke@fems.us.oracle.com
[Change Contact Information](#)

Default Shipping
Shipping Address Same as primary contact information.
[Change Default Shipping](#)

Default Billing
Billing Address Same as primary contact information.
[Change Default Billing](#)

[Return to Manage Profile](#)

Manage Profile - Default Addresses page

Note. In addition to the self-service application, this component is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

See [Chapter 21, "Working with Customer Self-Service Transactions," Self-Service Page Visibility, page 366.](#)

Updating Primary Contact Information

Access the Manage Profile - Contact Information page (click the Change Contact Information button on the Manage Profile - Default Addresses page).

Manage Profile

Contact Information

Click the Primary checkbox to specify address, phone, and email address to be used as your primary contact information.

Address

Primary	Address	Address Type		
<input checked="" type="checkbox"/>	2250 Lafayette Centre Drive Chantilly, VA 20151 United States	Home	Edit	Delete
<input type="checkbox"/>	111 Main St San Francisco, CA 94801 United States	Other	Edit	Delete

Add New Address

Phone

Primary	Country Code	*Telephone	Extension	*Phone Type	
<input checked="" type="checkbox"/>	<input type="text" value="001"/>	<input type="text" value="932/156-1124"/>	<input type="text"/>	Home ▾	Delete
<input type="checkbox"/>	<input type="text" value="001"/>	<input type="text" value="932/256-4089"/>	<input type="text"/>	Cellular ▾	Delete

Add New Phone

Change information directly above.

Email

Primary	*Email Address	*Email Type	
<input checked="" type="checkbox"/>	<input type="text" value="Davisclarke@fems.us.oracle.com"/>	Home ▾	Delete

Add New Email

Change information directly above.

Save

[Return to Manage Profile](#)

Manage Profile — Contact Information page

The Add New Address button transfers you to a page where you can add address information. The Add New Phone and Add New Email buttons add a new row to the Phone or Email grid for you to enter the new information. The user can edit their current phone numbers and email addresses directly on this page.

Maintaining Contact Address Books

This section discusses how to:

- Review customer addresses.

- Review customer contacts.
- Review customer primary information.
- Create customers or contact addresses.
- Create customer contacts.
- Select existing contacts.
- Select existing addresses.
- Maintain name, role information, and relationship address for customer contacts.
- Update customer or contact addresses.

Pages Used to Maintain Contact Address Books

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Address Book: View Addresses	RX_ADR_CUST_INFO	<ul style="list-style-type: none"> • Manage Profile, Address Book • Click the View Addresses link on the Address Book (View Contacts) page or the Address Book - Customer's Primary Information page. 	Review addresses that are associated with the customer.
Address Book: View Contacts	RX_ADR_CUST_CNTCT	Click the View Contacts link on the Address Book: View Addresses page or the Address Book - Customer's Primary Information page.	Review contacts that are associated with the customer.
Address Book: Customer's Primary Information	RX_ADR_CUST_DFLT	Click the View Customer's Primary Information link on the Address Book (View Addresses) or Address Book (View Contacts) page.	Review default contacts and addresses that are used for specific purposes.
Address Book - Create New Address	RX_ADR_REP_ADDR	Click the Add New Address button on the Address Book - Contact Information page.	Add a new address for a contact.
Address Book - Create New Contact	RX_ADR_NEW_REP	Click the Add New Contact button on the Address Book (View Addresses) page or the Address Book (View Contacts) page.	Create new contacts or new addresses for the customer.

Page Name	Definition Name	Navigation	Usage
Address Book - Select Contact	RX_ADR_USE_CNTCT	<ul style="list-style-type: none"> Click a Replace link on the Address Book - Customer's Primary Information page. Click the Copy Existing Contact link on the Address Book - Create New Contact page. 	Select new primary contacts for the roles that appear on the Address Book - Customer's Primary Information page and to copy the contacts into new address book entries.
Address Book - new address - Select Address	RX_ADR_SEL_CUST_DF	<ul style="list-style-type: none"> Click a Replace link on the Address Book - Customer's Primary Information page. Click the Copy Existing Address link on the Address Book - Create New Contact page. 	Select new primary addresses for the address roles that appear on the Address Book - Customer's Primary Information page and copy the addresses into new address book entries.
Address Book - Contact Information	RX_ADR_REP_INFO	<ul style="list-style-type: none"> Click the Edit link on the Address Book - Customer's Primary Information page. Click the Edit link on the Address Book (View Contacts) page. 	Edit an existing contact's information.
Address Book - Create New Address	RX_ADR_CUST_ADDR, RX_ADR_NEW_ADDR, RX_ADR_NEW_REP	<ul style="list-style-type: none"> Click the Add New Address button on the Address Book (View Addresses) page. Click the Add New Address link on the Address Book - new address - Select Address page. 	Add a new address for a customer. You do not need to associate the address with a specific contact.

Page Name	Definition Name	Navigation	Usage
Address Book - Update Address	RX_ADR_CUST_ADDR, RX_ADR_REP_ADDR	<ul style="list-style-type: none"> Click the Edit link on the Address Book - Customer's Primary Information page. Click the Edit link on the Address Book (View Addresses) page. Click the Edit link on the Address Book - Contact Information page for any contact who is associated with one or multiple addresses. 	Modify existing addresses.
Delete Confirmation	RX_ADR_DEL_CONFIRM	Click the Delete link on the Address Book (View Addresses) page or on the Address Book (View Contacts) page.	Confirm that you want to delete an address or contact. A deleted address is removed from the contact's address book but remains in the system with an end date that is equal to the date on which it was deleted.

Reviewing Customer Addresses

Access the Address Book: View Addresses page (Manage Profile, Address Book).

Address Book

Adventure 54

[View Addresses](#) [View Contacts](#) [View Customer's Primary Information](#)

Click [View Addresses](#), [View Contacts](#), or [View Customer's Primary Information](#) to view Address Book information. Options, such as Edit, Delete, and the Add buttons, vary according to your security privileges.

View Addresses

*Address Filter ▼

Addresses Customize Find  					
Address	Billing	Shipping	Sold To		
Central Office 4655 E 22nd Street Tucson, AZ 85711 United States	Primary	Primary	Primary	Edit	Delete

Address Book: View Addresses page

Addresses that are associated with the customer appear on this page. If the address is associated with a specific site, the site name appears as well.

Address Filter Select *Show all addresses*, *Show billing addresses*, *Show install-to site addresses*, *Show shipping addresses*, or *Show sold-to addresses*.

Billing, Shipping, and Sold To *Primary* appears in the appropriate column for the primary billing, shipping, and sold-to addresses. *Yes* appears in the appropriate column for additional addresses. To change a company's primary addresses, access the Address Book - Customer's Primary Information page.

Deleting Addresses

When you click the Delete link for an address, the Delete Confirmation page appears.

If the address is associated with a contact, you can select whether to delete the address for all contacts who use this address or only for the current contact.

If you delete the address for all contacts but the address is a default bill to, ship to, or sell-to address, the system does not delete the address. Instead, the system removes any associations that contacts have to this address.

Reviewing Customer Contacts

Access the Address Book: View Contacts page (click the View Contacts link on the Address Book: View Addresses page or the Address Book - Customer's Primary Information page).

Address Book

Adventure 54

[View Addresses](#)
[View Contacts](#)
[View Customer's Primary Information](#)

Click View Addresses, View Contacts, or View Customer's Primary Information to view Address Book information. Options, such as Edit, Delete, and the Add buttons, vary according to your security privileges.

Contacts					
Name	Billing	Shipping	Sold To		
Perry,David L	Yes	Yes	Yes	Edit	Delete
Jacobsen,Karen	Primary	Primary	Primary	Edit	Delete
Trimble,Kelly	Yes	Yes	Yes	Edit	Delete
Carman,Jake	Yes	Yes	Yes	Edit	Delete
Grady,Sheila	Yes	Yes	Yes	Edit	Delete
JimD,JimD	Yes	Yes	Yes	Edit	Delete

[Add New Contact](#)

Address Book: View Contacts page

Contacts who are associated with the customer appear on this page.

Billing, Shipping, and Sold To

Primary appears in the appropriate column for the primary billing, shipping, and sold-to contacts. *Yes* appears in the appropriate column for additional contacts. To change a customer's primary contacts, access the Address Book - Customer's Primary Information page.

Reviewing Customer Primary Information

Access the Address Book: Customer's Primary Information page (click the View Customer's Primary Information link on the Address Book: View Addresses or Address Book: View Contacts page).

Address Book

Customer's Primary Information

Adventure 54

[View Addresses](#)
[View Contacts](#)
[View Customer's Primary Information](#)

Click View Addresses, View Contacts, or View Customer's Primary Information to view Address Book information. Options, such as Edit, Delete, and the Add buttons, vary according to your security privileges.

Primary Information			
Customer Contact:	David Perry	Edit	Replace
Billing Contact	Karen Jacobsen	Edit	Replace
Shipping Contact	Karen Jacobsen	Edit	Replace
Sold To Contact	Karen Jacobsen	Edit	Replace
Customer Address:	Central Office 4655 E 22nd Street Tucson, AZ 85711 United States	Edit	Replace
Billing Address:	Central Office 4655 E 22nd Street Tucson, AZ 85711 United States	Edit	Replace
Shipping Address:	Central Office 4655 E 22nd Street Tucson, AZ 85711 United States	Edit	Replace
Sold To Address:	Central Office 4655 E 22nd Street Tucson, AZ 85711 United States	Edit	Replace

Address Book: Customer's Primary Information page

The customer's overall primary contact and address and primary billing, shipping, and sold-to contacts and addresses appear on this page. You can modify the contacts and addresses or select a new primary contact and address.

Creating Contact Addresses

Access the Address Book: Create New Address page (click the Add New Address button on the Address Book: View Addresses page).

Address Book

Create New Address

Adventure 54

Enter new address information and Save.

Address Information

***Address Type** Business ▼

***Country** United States ▼

Address 1

Address 2

Address 3

City

County

State ▼

Postal

Select roles for how the address will be used. (Check all that apply)

Address Role: ☐ **Bill To Customer**

☐ **Ship To Customer**

☐ **Sold To Customer**

You are changing an address which may be associated with more than one person.

[Cancel and Return to Address Book](#)

* Required Field

Address Book: Create New Address page

This page is similar to the Create New Address page.

Enter the new address information. If the address is a billing, shipping, or sold-to address, select the appropriate address role check box.

Note. The Address Roles appear only for users who are contacts of companies, not for end consumers.

Creating Customer Contacts

Access the Address Book: Create New Address page (click the Add New Contact button on the Address Book: View Addresses page or the Address Book: View Contacts page).

This page is similar in use to page that is used to create new contact addresses, except that it contains additional lines for you to enter contact information.

Contact Information

If the new contact is a billing, shipping, or sold-to contact, select the appropriate contact role check box.

Address Book

Create New Address

Adventure 54

Enter a contact's name and address information. You can copy an existing contact or an existing address to this form by clicking the appropriate link.

Contact Information

*First Name

Middle Name

*Last Name

Use existing contact

Select contact roles for this person. (Check all that apply)

Contact Role:

☐ Billing Contact

☐ Shipping Contact

☐ Sold To Contact

Address Book: Create New Address - Contact Information page

Address Information

*Address Type

Business

▼

*Country

United States

▼

Address 1

Address 2

Address 3

City

County

State

▼

Postal

Use Existing Address

Select roles for how the address will be used. (Check all that apply)

Address Role:

☐ Bill To Customer

☐ Ship To Customer

☐ Sold To Customer

Save

[Cancel and Return to Address Book](#)

* Required Field

Address Book: Create New Address - Address Information page

One use only - not a permanent address or contact

Select to create a temporary contract and address just for the corresponding transaction.

Note. This field appears only if you are adding a shipping address.

Selecting Existing Contacts

Access the Address Book: Select Contact page (click a Replace link on the Address Book - Customer's Primary Information page).

Address Book

Select Contact

Adventure 54

Click Select to specify the contact you will use.

Selected product cannot be ordered through Self-Service channel.

Name	
David Perry	Select
Karen Jacobsen	Select
Kelly Trimble	Select
Jake Carman	Select
Sheila Grady	Select
JimD JimD	Select

[Return to Customer's Primary Information](#)

Address Book: Select Contact page

Selecting Existing Addresses



Access the Address Book - Select Address page (click a Replace link on the Address Book - Customer's Primary Information page).

Address Book

Select Address

Click Select to specify the address you will use.

Selected product cannot be ordered through Self-Service channel.

Customize | Find |  

Address	Select
Central Office 4655 E 22nd Street Tucson, AZ 85711 United States	Select

Add New Address

[Cancel and Return to Customer's Primary Information](#)

Address Book - Select Address page

Maintaining Name, Role Information, and Relationship Address for Customer Contacts

Access the Address Book - Contact Information page (click the Edit link on the Address Book - Customer's Primary Information page).

Address Book

Contact Information

Adventure 54

Edit contact information and save. Edit/Delete existing address, or Add a new address.

Contact Information

***First Name** Karen

Middle Name

***Last Name** Jacobsen

Select contact roles for this person. (Check all that apply)

Contact Role: ☒ **Billing Contact**

☒ **Shipping Contact**

☒ **Sold To Contact**

No address available.

Save Contact

Add New Address

[Cancel and Return to Customer's Primary Information](#)

* Required Field

Address Book - Contact Information page

If the contact is a billing, shipping, or sold-to contact, select the appropriate contact role check box.

Click Edit or Delete to maintain the address for the contact-to-customer relationship. Click the Add New Address button to enter a new address for this relationship.

Updating Customer or Contact Addresses

Access the Address Book - Update Address page (click the Edit link on the Address Book - Customer's Primary Information page).

Address Book

Update Address

Adventure 54

Enter address changes and Save.

Address Information

*Address Type Business

*Country United States

Address 1 4655 E 22nd Street

Address 2

Address 3

City Tucson

County

State Arizona

Postal 85711

Select roles for how the address will be used. (Check all that apply)

Address Role: ☒ Bill To Customer
☒ Ship To Customer
☒ Sold To Customer

You are changing an address which may be associated with more than one person.

Save [Cancel and Return to Customer's Primary Information](#)

* Required Field

Address Book - Update Address page

This page is almost identical to the Address Book - Create New Address page. Unless you are a contact of a customer, the *Address Roles* are not visible.

Maintaining Consumer Contact and Address Information

This section lists the pages that consumers use to maintain their contact and address information.

Note. These pages are similar in appearance and usage to the pages that are used to maintain address information for contacts. You must be signed in as a customer to view these pages.

See [Chapter 21, "Working with Customer Self-Service Transactions," Maintaining Contact Information, page 376.](#)

Pages Used to Maintain Consumer Contact and Address Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Change Profile Info	RX_NAME_SIGNIN	Manage Profile, Change Profile Info	Review and edit name, password, and privacy preferences.
Manage Profile - Default Addresses	RX_PROFILE_DFLT	Manage Profile, Default Addresses	View and initiate update of the consumer's default contact information, shipping address, and billing address information.
Manage Profile - Contact Information	RX_ADR_MY_INFO	Click the Change Contact Information button on the Manage Profile - Default Addresses page.	Change the consumer's address, phone number, and email address information.
Address Book - Customer's Primary Information	RX_ADR_CUST_DFLT	Click the Change Default Shipping or Change Default Billing button on the Profile - Default Addresses page.	Review the consumer's primary address, primary billing address, and primary shipping address.
Address Book - Select Address	RX_ADR_SEL_CUST_DF	Click a Replace link on the Address Book - Customer's Primary Information page.	Select a new address of any of the address roles that appear on the Address Book - Customer's Primary Information page.
Address Book - Create New Address Address Book - Update Address	RX_ADR_CUST_ADDR	<ul style="list-style-type: none"> Click the Edit link or the Add New Address button on the Profile - Contact Information page. Click the Edit link on the Profile - Customer's Primary Information page. 	Create or update addresses.
Address Book - Delete Confirmation	RX_ADR_DEL_CONFIRM	Click the Delete link on the Profile - Contact Information page.	Delete selected address.

Maintaining Consumer Address Books

This section lists the pages that consumers use to maintain their address books.

Note. These pages are similar in appearance and usage to the pages that contacts use to maintain their address books. Differences in usage are explained below

See [Chapter 21, "Working with Customer Self-Service Transactions," Maintaining Contact Address Books, page 379.](#)

Pages Used to Maintain Consumer Addresses Books

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Address Book	RX_ADR_CONSUMER	Manage Profile, Address Book	Review addresses that are associated with the consumer.
Address Book - Update Address	RX_ADR_CUST_ADDR	Click the Edit link on the Address Book page.	Modify addresses in the address book.
Address Book - Create New Address	RX_ADR_NEW_REP	Click the Add New Address button on the Address Book page.	Create addresses in the address book for the consumer.
Address Book - new address - Select Address	RX_ADR_SEL_CUST_DF	<ul style="list-style-type: none"> Click the Replace link on the Address Book - Customer's Primary Information page. Click the Use Existing Address link on the Address Book - Create New Address page. 	Select addresses to copy into new address book entries.
Address Book - Delete Confirmation	RX_ADR_DEL_CONFIRM	Click the Delete link on the Address Book page.	Confirm that you want to delete the address, and select whether to delete it for all users or the current user.

Viewing Consumer Addresses

Access the Address Book page (Manage Profile, Address Book).

Address Book

Davis Clarke

Edit or Delete an existing address, or click Add Address to add a new address.

Addresses				
Last Name	First Name	Address		
Clark	Davis	111 Main St San Francisco, CA 94801 United States	Edit	Delete
Clarke	Davis	2250 Lafayette Centre Drive Chantilly, VA 20151 United States 932/156-1124	Edit	Delete

[Add New Address](#)
[Return to Manage Profile](#)

Address Book page for a consumer

Note. In addition to the self-service application, this page is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

See [Chapter 21, "Working with Customer Self-Service Transactions," Self-Service Page Visibility, page 366.](#)

If the address is associated with a contact, the contact's name appears in the name columns. If the address is associated only with a consumer, the consumer's name appears in the name columns.

Deleting Consumer Addresses

Access the Address Book - Delete Confirmation page (click the Delete link on the Address Book page).

When you delete a consumer address that is not associated with a contact, the system displays only the Yes - Delete and No - Do Not Delete buttons on this page.

If the address is associated with a contact, you can select whether to delete the address for all contacts who use this address or only for the current contact.

If you delete the address for all contacts but the address is a default bill to, ship to, or sell-to address, the system does not delete the address. Instead, the system removes any associations that contacts have to this address.

Viewing Internal Contacts


This section discusses how to view internal contacts.

Page Used to View Internal Contacts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Contact Directory	WC_CONTACT_DIR	<ul style="list-style-type: none"> Customer Care, Internal Contacts, Contact Directory Service Center, Internal Contacts, Contact Directory (in the employee portal for Higher Education users). 	View the names and contact information of people in an organization who are available for customers to contact for assistance.

Viewing Internal Contacts

Access the Contact Directory page (Customer Care, Internal Contacts, Contact Directory).

Contact Directory				
MMA Property Management Group				
Email	Role	Name	Phone	Email
	Acct Con	Tripper, Elsie P	925/694-2001	crmbptest@yahoo.com
Return to Customer Care				

Contact Directory page



(Email)

Click to open your email application to send an email message to the corresponding contact using the listed email address.

Return to Customer Care

Click to return to the parent folder (Customer Care).

For Higher Education users to return to the parent folder (Service Center) of the Contact Directory page, use the PeopleTools navigation path link on the top of the page.

Sending Contact Us Messages

This section discusses how to send Contact Us messages.

Page Used to Send Contact Us Messages

Page Name	Definition Name	Navigation	Usage
Contact Us	WC_CONTACT_US	Contact Us, Contact Us	Self-service users can send messages to your organization.

Sending Contact Us Messages

Access the Contact Us page (Contact Us, Contact Us).

Contact Us

Contact Us by Email

*Customer

Adventure 54

*Name

JimD,JimD

Email Address

jimd@adventure54.com

Would you like a confirmation email?

☐ Yes

☒ No

Please select the Subject and Topic for proper routing.

Subject

Comments/Information

Topic

Fulfillment Request

Message

Send

Contact Us page

Note. In addition to the self-service application, this page is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

See [Chapter 21, "Working with Customer Self-Service Transactions," Self-Service Page Visibility, page 366.](#)

Each subject-topic combination is associated with a workflow action that you specify. The workflow action sends a notification that alerts the recipient to the newly submitted message.

If you use the 360-Degree View feature, the system creates an interaction when the user sends the message. In this situation, the notification normally includes a link to the new interaction.

If the user requests a confirmation email, the system sends a message based on the Contact Confirmation email template. You cannot choose a different template for the confirmation email. You can, however, modify the text of the template.

Live Chat with Agent

Expand this page region and click the Start Chat button to initiate a two way chat session with a support agent.

This section appears if the page is chat-enabled on the Chat Enabled Page Setup page.

See Also

[Chapter 20, "Setting Up Customer Self-Service," page 351](#)

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Setting Up PeopleSoft CRM Workflow"

PeopleSoft Enterprise CRM Portal Pack 9.1 PeopleBook, "Working with PeopleSoft CRM Self-Service Pagelets"

Registering Products

This section discusses how to:

- Register products.
- Enter product registration information.

Pages Used to Register Products

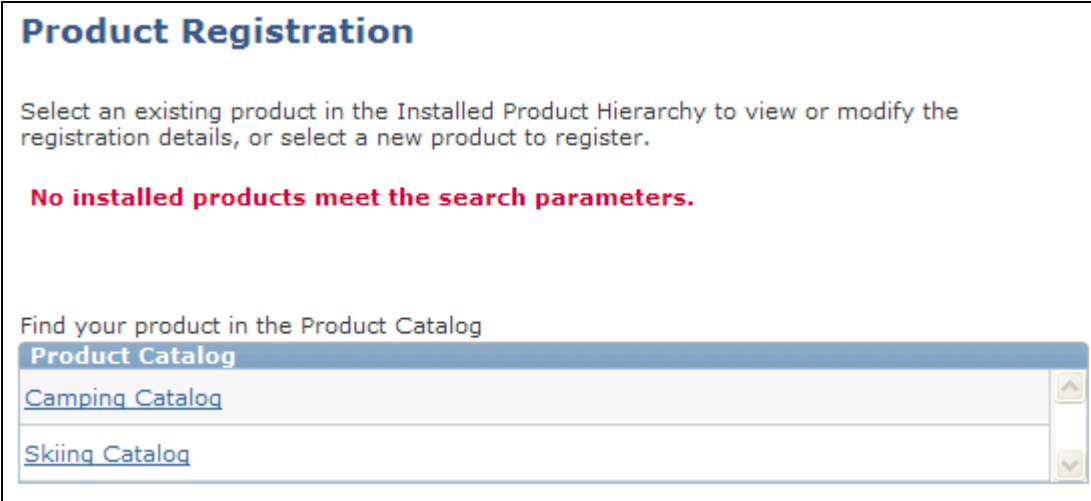
Page Name	Definition Name	Navigation	Usage
Product Registration	RF_PROD_REG_SRCH	Product Registration, Product Registration	Register new or existing products.
Product Registration - Product Registration Details	RF_PROD_REG_DET	Click a product link in the Your Existing Products group box or the New Product group box (after locating the product from product catalogs) on the Product Registration page.	Enter product registration information.

See Also

Chapter 20, "Setting Up Customer Self-Service," Setting Up Product Registration, page 359

Registering Products

Access the Product Registration page (Product Registration, Product Registration).



Product Registration

Select an existing product in the Installed Product Hierarchy to view or modify the registration details, or select a new product to register.

No installed products meet the search parameters.

Find your product in the Product Catalog

Product Catalog	▲
Camping Catalog	
Skiing Catalog	▼

Product Registration page

The Product Catalog group box lists the catalogs that you can use for product registration. Depending on how a catalog is set up, you can view a simple list of products, a list of product categories, or both. Regardless of whether you need to browse through different levels to find a product, click a product link to access the Product Registration - Product Registration Details page and submit the product registration.

Note. In addition to registering products in PeopleSoft CRM self-service, users can also contact CSRs, who can register products for customers through the 360-Degree View.

See Also

Chapter 19, "Using the 360-Degree View," page 335

Entering Product Registration Information

Access the Product Registration Details page (click a product link in the Your Existing Products group box or the New Product group box (after locating the product from product catalogs) on the Product Registration page).

Product Registration


Product Registration Details


Fill out the Product Registration Details. When finished, click Submit to complete the registration process.

Registration


Product Camping Package

Date Registered

Purchase Date 

Site 

Purchased From

Comments 

[Return to Product Registration](#)

Product Registration Details page

The Registration group box displays the name of the product that you selected from the catalog, as well as the installed product fields that you selected during setup to appear for product registration purposes.

Administrators can define the fields that appear on this page by using the Product Registration Setup page. Modify these fields for a specific product on the Installed Product page in the Product Definition component. Also, when defining these fields, you can specify whether a user can modify the field value on existing installed products.

In this example, self-service users can enter the serial ID, purchase date, site, location details, and comments for the registration. When the product registration is submitted successfully, the system displays a record of it with the date of registration in the Your Existing Product group box. The system updates the associated installed product with the information that the user entered during product registration. If it is a new product, the system creates an installed product with a status of *Installed*.

Submit Click to submit and save the product registration. The system automatically populates the registered date with the current system date when you submit the registration.

Cancel and Return Click to return to the Product Registration page.

Part 6

Contact Management

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Chapter 22

Working with Contacts

This chapter provides an overview of contact management in PeopleSoft CRM and discusses how to:

- Manage contacts.
- Maintain contact groups.

Understanding Contact Management

Contact management enables salespeople (or relationship managers) to manage contacts, tasks, and calendars across all of their accounts by using an easy and intuitive user interface. Relationship managers can:

- Add system contacts to their list.
- Create and manage contact groups.
- Send an email message to selected contacts.
- Create tasks, schedules, and call reports for selected contacts.

This feature focuses on shared contacts. The contacts entered and viewed are enterprise contacts and do not include a user's personal contacts or contacts that are private in any manner. This means that all users can access the contacts and can add the same contacts to their list.

To add private data for a contact that is visible only to you, use the user-defined fields within the Person component.

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Defining Person Business Objects."

Contact management is widely used in industries that support business-to-business (B-to-B), high net worth business-to-consumer, and team selling environments, such as financial services and insurance.

Call Reports

Sales call reports document a contact event such as a meeting, demonstration, or phone call. They are always produced after the event and are follow-up memos documenting the attendees and what took place during the event.

Contact Management Toolbar

PeopleSoft CRM provides a toolbar that is on every Contact Management page. This toolbar enables you to transfer between Contact Management pages and perform commonly used actions for your contact list. You can also access accounts, tasks, and calendars by using the toolbar.

See Also

PeopleSoft Enterprise Sales 9.1 PeopleBook, "Managing Sales Leads and Opportunities"

Chapter 23, "Working with Tasks," page 417

Chapter 16, "Using Calendars," page 255

Managing Contacts

This section discusses how to:

- Access contacts.
- Enter additional filtering criteria.
- Modify columns that appear on the contacts list.
- Personalize the search filter.
- Add existing contacts to the contacts list.
- Add contacts to the system.

Pages Used to Manage Contacts

Page Name	Definition Name	Navigation	Usage
My Contacts	RD_CONTACTS	My Contacts	Access contacts to perform various actions for the contacts.

Page Name	Definition Name	Navigation	Usage
Notification	RD_EMAIL_CNTCT	<ul style="list-style-type: none"> Click the Email Contact(s) toolbar button on the My Contacts page. Select <i>Email Contact(s)</i> in the Action field on the My Contacts page. 	<p>Send an email notification to selected recipients and members of selected contact groups on the Outbound Notification page.</p> <p>See <i>PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook</i>, "Sending Manual Notifications," Sending Manual Notifications From CRM Transactions.</p>
My Contacts - Search Contacts	RD_IMPORT_CONTACTS	Click the Search Contacts button on the My Contacts toolbar.	Search for contacts that are already defined in the system and select one or more to add to the My Contacts list.
Remove Contacts	RD_REMOVE_CNTCT	<p>Select one or more listed contacts.</p> <ul style="list-style-type: none"> Click the Remove Contacts button on the My Contacts toolbar. Select <i>Remove Contact(s)</i> from the Action drop down list and click the Go button. 	Remove one or more contacts from the My Contacts and all contact groups to which the contact belongs.
Person	RD_PRSN_PRIMARY	Click the Add Contact button on the My Contacts page.	Add a contact to the system.

Accessing Contacts

Access the My Contacts page (My Contacts).

My Contacts

My Accounts | My Tasks | My Calendar | Search Contacts | >> [Personalize](#)

*View Contacts All My Contacts [Advanced Filter](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | All

Contacts [Customize](#) [Find](#) [View All](#) First **1-6 of 6** Last

Primary [Addresses](#) [Other Information](#)

Select	Last Name	First Name	Company	Title	Phone	Email Address
<input type="checkbox"/>	Albright	Fred	MMA Property Management Group	Repair Technician	651/785-6687	falbright@mma.com
<input type="checkbox"/>	Levy	Rick	Health Conscious.com	Property Manager	408/998-4213	rlevy@2healthcon.com
<input type="checkbox"/>	Schwartz	Toby			9255550982	
<input type="checkbox"/>	Smith	Todd	MD Engineering	Expert Analyst	212/711-8020	tsmith@tcfnet2.com
<input type="checkbox"/>	Snow	Tom	Saratoga Container Company	Controller	914 246 3033	tsnow@yahoo.com
<input type="checkbox"/>	Williams	Victoria	Health Conscious.com	Vice President	408/998-5647	vwilliams@healthcon.com

☐ [Check All / Clear All](#)

Action [Go](#)

[Add Contact](#)

My Contacts page

Use the letters that appear below the View Contacts field as an index to select the starting letter of the contact names to view. You can modify the way the index appears: for example, you might define the index letters as A-C, D-F, and so forth.

See [Chapter 3, "Setting Up General Options," Defining Alpha Indexes, page 44.](#)

View Contacts Select a contact group to view.

Advanced Filter Click this link to enter additional criteria by which you can filter the contact list.

Select Select one or more contacts for which to perform a specified action.

Check All / Clear All Select to select all listed contacts or to clear all selected contacts.

Note. This option selects or clears only the contacts on the page that currently appears.

Action

Select the action to perform for the selected contacts.

For example, if you select *Email Contact(s)*, then the system displays an email page that is pre-addressed to all of the selected contacts.

Actions are:

- *Add Call Report for Contact(s)*
- *Add Contact(s) to Group*
- *Add Task for Contact(s)*
- *Email Contact(s)*
- *Remove Contact(s)*

Security Considerations

The system provides safeguards against users viewing contact information for which they are not authorized:

- For users that do not have access to all companies that are defined in the system, the company column is blank.
- For users that do not have access to worker information, the worker home phone and worker home address columns are blank, even if they are visible to other users.

Entering Additional Filtering Criteria

Access the Advanced Filter section of the page (click on the Advanced Filter link on the My Contacts page).

▼ Filter

Use Saved Filter

First Name

begins with

Last Name

begins with

Company

begins with

City

begins with

State

=

▼ Show in Results

☐ View Company Account Children

☐ View Workers in My Department

☐ View as Account Member

☐ View as Account Owner


☐ View as Lead Team Member


☐ View as Opportunity Team Mbr


Filter

Clear

Basic Filter

 Save Filter Criteria

 Delete Saved Filter

 Personalize Filter

My Contacts: Search page - Advanced Filter section)

Enter one or more search criteria to filter the results by the criteria entered.

Note. Unless the signed-on user has access to all companies, they aren't able to search for a contact based on the company criteria.

Show in Results

Select one or more roles to display only contacts for which you have the selected role(s). For example, select *View as Account Owner* to show only the contacts for customers where you are the account owner.

Modifying Columns that Appear on the Contacts List

Access the Personalize Column and Sort Order page (click the Customize link at the top of the Contacts section on the My Contacts page).

Contacts

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.

Frozen columns display under every tab.

Column Order

Tab Primary (frozen)

Select (frozen)

(column 5) (frozen)

Last Name (frozen)

First Name (frozen)

Company (frozen)

Title (frozen)

Phone

Email Address

Tab Addresses

Home Address

Address

State



Postal


Tab Other Information

Employer

Cell Phone

Home Phone








☐ Hidden

☐ Frozen

Sort Order





☐ Descending

OK

Cancel

Preview

[Copy Settings](#)

Personalize Column and Sort Order page

The columns that appear on the My Contacts list are shown in the Column Order list box. You can select a column and rearrange its order, hide it, or use it as a sort column.

Some predefined columns (*Home Address, Address, State, Postal, Employer, Cell Phone, and Home Phone*) are not included in the column order and sort order that appear on this page. To set up the contact list so that you can view those columns, click the Personalize Filter link on the Advanced Filter page.

Personalizing the Search Filter

Access the Personalize Filter Settings page (click the Personalize Filter link on the My Contacts page).

Personalize Filter Settings

Search Button Position

☐ Top ☒ Bottom ☐ Both Top and Bottom

Advanced / Basic Lookup

If no previous Search Definition is being reloaded, then default to:

Collapse the Search Section?

☐ Show Collapsed When Page Opens ☐ Collapse After Doing a Search

Results Grid Initialization

☐ Populate the grid automatically, apply the most recently used criteria

☐ Populate the grid automatically, apply my default saved search

☒ Do not populate the grid

Personalize Filter Settings page (1 of 2)

Select Search Fields to Display

☒ First Name

☒ Last Name

☒ Company

☒ City

☒ State

[Cancel](#)

Personalize Filter Settings page (2 of 2)

The Personalize Filter link is available in the Filter section that appears when you click the Advanced Filter link on the My Contacts page.



Adding Existing Contacts to the Contacts List

Access the My Contacts - Search Contacts page (click the Search Contacts button on the My Contacts toolbar).

My Contacts

Search Contacts

First Name begins with Teri

Select	Last Name	First Name	Company	Title	Phone	Email Address
<input type="checkbox"/>	 Thomas	Teri	MMA Property Management Group	Management Associate	651/785-2546	tthomas@mma.com
<input type="checkbox"/>	 Katen	Teri	IMC, Inc	Support Manager	612/340-1212 (332)	tkaten@imc3.com

☐ [Check All / Clear All](#)

Search

Use Saved Search

First Name




Last Name

Company

Phone

Email

Merge Status

[Advanced Search](#)  [Save Search Criteria](#)  [Delete Saved Search](#)  [Personalize Search](#)

Search Contacts page

This page initially appears with only the search fields visible. The results of the search appear in the contacts list. You can select one or more contacts to add to the My Contacts list.

You can also add contacts to the contact list from the contact list from these components:

- 360 Degree View
- Person
- Company
- Site

To automatically insert contacts to the contact list, specify *Yes* in the Auto Insert to My Contacts field that is available on the Sales page of the User Preferences component.

If this flag is set to *Yes* for a user, a user can click the Add to My Contacts toolbar button on the Company, Site, Person, Lead, or Opportunity components to add contacts on that component to the user's My Contacts list.

Contacts of a customer (company or consumer) are added to the customer account owner's and team members' contact lists. Contacts of a company's child companies can be added to the account owner's contact list. Contacts of leads and opportunities can also be added to the contact lists for the lead or opportunity team members.

See Also

Chapter 4, "Setting Up Security and User Preferences," Defining Sales Preferences, page 93

Adding Contacts to the System

Access the Person page (click the Add Contact button on the My Contacts page).

Person (Business Contact) History Select One...

Save | 360-Degree View | Search | My Contacts | My Tasks | >> Personalize

Name **Phone Number**
Email Address

Person Tasks Call Reports Customers Notes Contact Info Relationships More Info

Primary Details User Profiles Credit Cards

Person Information

Salutation ▼

*First Name

*Last Name

Company

Date of Birth Age

Middle Name

Suffix

Title

Gender ▼

More Names

Person page

When you access the Person page from the contact management toolbar, any contact that you add to the system is automatically added to your contact list.

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Person Business Objects"

Maintaining Contact Groups

This section discusses how to:

- Manage contact groups.
- Add or remove contacts of a contact group.
- Maintain groups and group membership.

Pages Used to Maintain Contact Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Group Management	RD_GROUP_MGT	My Contacts Click the Group Management toolbar button.	Manage contact groups.
Group Selections	RD_CNTCT_GRP	My Contacts Select <i>Add Contacts to Group</i> in the Action field.	Add or remove contacts of a contact group.
Group Information	RD_GROUP_MGT	<ul style="list-style-type: none"> Click the name of an existing group on the Group Management page. Click the Add Group button on the Group Management page. 	Maintain groups and group membership.

Managing Contact Groups

Access the Group Management page (click the Group Management toolbar button on the My Contacts page).

My Contacts

Group Management

Groups	
Group Name	
Premier References	
User Group	

[Add a Group](#)

[Save](#) [Return to My Contacts](#)

Group Management page

Group Name Click a listed group to open the Group Information page for the group.

Add a Group Click this button to access the My Contacts - Group Information page and add group details and members to the group.

Adding or Removing Contacts of a Contact Group

Access the Group Selections page (select Add Contacts to Group in the Action field on the My Contacts page).

My Contacts

Group Selections

Please select an existing group, or create a new group for selected Contact(s)

Groups	
Group Name	
Premier References	Select
User Group	Select

Add a Group

[Cancel and Return to My Contacts](#)

Group Selections page

Select

Click this button to access the Group Information page where you can add or remove contacts of the group.

Maintaining Groups and Group Membership

Access the Group Information page (click the name of an existing group on the Group Management page).

My Contacts

Group Information

Group Details

*Group Name Premier References *Description Premier References

Member(s)
Customize Find View All First 1-2 of 2 Last

Contact Name	Company	Phone	Email	
Terry Cox	Health Conscious.com	408/998-7721	tc Cox@healthcon.com	
Fred Albright	MMA Property Management Group	651/785-6687	falbright@cadymont.com	

Add Group Member

First Name Last Name Select Select Contact Group

OK [Cancel and Return to Group Selections](#)

Group Information page

To add a member to the current group, enter first and last names of the contact and click the Select button. If more than one matching contact is returned, the system takes you to the Search for Contact page where a list of contacts with names beginning with the characters you entered are displayed. Select one or more contacts and click the Select button to add them to the current contact group.

Note. If CDH integration is enabled, the duplicate prevention logic is triggered when you click the Select button. If it finds duplicate entries that resemble the contact you are about to add, you can either select an existing match from the list that returns, or choose to create a new person record in CDM using Quick Create.

Chapter 23

Working with Tasks

This chapter provides an overview of task management in PeopleSoft CRM and discusses how to:

- Set up task management.
- Create tasks.
- Manage tasks.
- View calendars.
- Manage meetings.

See Also

Chapter 22, "Working with Contacts," page 403

Understanding Task Management

Task management enables users to plan and manage the day-to-day activities that are associated with managing sales, service, and support activities.

Tasks are associated with workflow items that are triggered by PeopleSoft CRM transactions, such as leads and opportunities. If a transaction triggers a workflow item that assigns a task to a user, then that task appears in the user's task list and the user's calendar. If the task is for a meeting, the task appears in the user's meeting list. You access task lists, calendars, and meeting lists using the My Tasks and My Calendar pages.

Users can access their task list directly from the left-hand menu or by clicking a toolbar button that is available on the My Contacts and My Calendar pages. Additionally, users can view tasks that are associated with a transaction or component.

You can create tasks from these components.

- Lead
- Opportunity
- Strategic account management
- Risk Component in Wealth Management
- Change Management

- Case
- Service Order

Details of a task that appear on the My Tasks, My Calendar, or My Meetings page are available by clicking the task name.

Task Types

PeopleSoft CRM provides these task types when the application is first installed:

- All Day Event
- Appointment
- Change Activity
- Change Approval
- Change Meeting
- Holiday
- Follow-up
- Meeting
- Phone call
- Reminder
- Service Order
- Summary
- To-do

You can also set up additional task types.

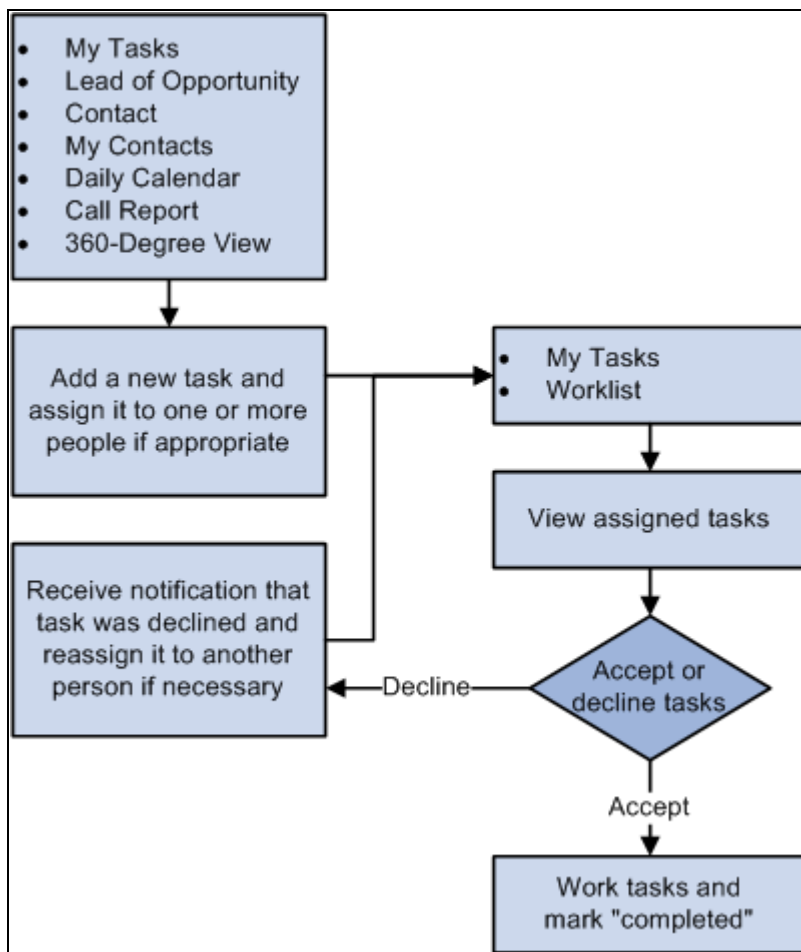
See [Chapter 23, "Working with Tasks," Setting Up Task Management, page 421.](#)

Task Management Process

A task owner creates a task and assigns it to one or more persons. A notification is then sent to each of the assignees that a task is assigned to them, and the task appears in the assignee's task list. The assignee can either accept or decline the task. The owner is notified when the assignee marks the task as completed.

The task owner can reassign a task for any of the assignees. An assignee can reassign a task that is assigned to them. When a task is reassigned, the system sends a notification to the new assignee that the task is assigned to them. When the new assignee accepts or declines the task, the system notifies the owner.

This diagram shows the task management process:



Task Management Process Flow

You can also call the Task web service to perform many task management inquiries and notifications.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Business Processes and Web Services."

Personal Information Managers

You can synchronize tasks between the PeopleSoft CRM database and personal information management (PIM) systems such as Microsoft Outlook and Lotus Notes.

See your current Infosync Server documentation for more information.

Task Folders

Users can organize their tasks using folders. Five standard folders are available; users can additionally create their own personal folders. Personal folders are used only for entries from a user's individual set of tasks, not for tasks from a group or from a user's direct reports. Clicking a folder name displays the contents of that folder. A yellow highlight indicates the currently selected folder.

These are the standard folders:

- The *My Tasks* contains all tasks owned by or assigned to the user that have not been moved to another personal folder
- The *All My Tasks* folder is a combination of *My Tasks* and other user-defined (personal) folders. It contains the tasks that appear under *My Tasks* and all user-defined folders.

It does not include items from the Group Tasks, Direct Reports, or My Sales Team folders.

- The *Group Tasks* folder contains tasks that are owned by a provider group without an individual owner. Only entries from the provider groups to which the user belongs are shown.

This folder appears only if the user belongs to at least one provider group.

- The *Direct Reports* folder contains the tasks owned by, assigned to or delegated to direct reports. By default, the tasks of all the direct reports along with their delegated tasks will show up under this folder

This folder appears only if the user has direct reports. The Direct Reports folder will not, however, show the user's personal tasks.

When viewing the Direct Reports folder, users have access to a drop-down list box for selecting a specific employee and filtering the task entries accordingly.

- The *My Sales Team* folder contains the tasks owned by, assigned to or delegated to members of your sales team.

This folder appears only if the user is the leader of a sales team (as defined by the Territory Tree).

When viewing the My Sales Team folder, users have access to a drop-down list box for selecting a specific employee and filtering the task entries accordingly.

- The *Delegated* folder contains any tasks that have been delegated to that user. Delegation of a user's tasks is defined on the Task Options page.

Users can create, rename, and delete personal folders at will. However, if a user attempts to delete a folder that is not empty, an error message tells the user to move the folder contents elsewhere (to another personal folder or to the inbox) first.

Note. The My Tasks, All My Tasks, Group Tasks, Direct Reports, My Sales Team, and Delegated folders cannot be deleted or renamed

The toolbar on the My Tasks page includes a button that a user clicks to display the number of items in each folder. The folder count appears in parentheses next to the folder name. The system, however, does not provide folder counts for the Group Tasks, My Sales Team, Direct Report, or Delegated folders. For performance reasons, the folder counts are *not* updated continuously.

By default, the system hides folder counts when the page first appears. After they are displayed, however, they remain visible as long as the user remains on the page. To hide folder counts, users must navigate to the My Tasks page again.

Important! Folder counts are only as current as the most recent time that the user clicked either the Folder Counts toolbar button or the Refresh toolbar button.

See Also

PeopleSoft Enterprise Sales 9.1 PeopleBook, "Managing Sales Leads and Opportunities"

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Company Business Objects"

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Person Business Objects"

[Chapter 4, "Setting Up Security and User Preferences," Setting System-Wide Security Options, page 69](#)

[Chapter 19, "Using the 360-Degree View," page 335](#)

Setting Up Task Management

To set up task management, use the Task Priority (RB_TSK_PRIORITY) and Task Type (RB_TSK_TYPE) components.

This section lists the pages used to set up task management and discusses how to:

- Define task types.
- Define task priorities.
- Define task group templates.
- Define task durations.

Note. Your PeopleSoft Application Administrators can control and modify access to all PeopleSoft CRM pages, including those that are used for Task Management, through the standard PeopleTools security using roles, permission lists, and user IDs. Documentation for this security administration is provided in *Enterprise PeopleTools 8.50 PeopleBook: Security Administration*.

Pages Used to Set Up Task Management

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Task Type	RB_TSK_TYPE	Set Up CRM, Common Definitions, Task Management, Task Type, Task Type	Define task type codes that enable the user to categorize tasks.
Task Priority	RB_TSK_PRIORITY	Set Up CRM, Common Definitions, Task Management, Task Priority, Task Priority	Define task priority codes that enable the user to designate a priority for tasks.

Page Name	Definition Name	Navigation	Usage
Task Group Template	RB_TSK_GRP_TPL	Set Up CRM, Common Definitions, Task Management, Task Group Template, Task Group Template	Define task group templates and task durations.
Clone Template	RB_CLONE_TXN_SEC	Click the Clone button on the Task Group Template page.	Specify a new template name to be created from the current template.

Defining Task Types

Access the Task Type page (Set Up CRM, Common Definitions, Task Management, Task Type, Task Type).

Task Type

Task Type

Task Type APPOINTMENT

*Application Usage All Applications

☒ Active
☒ Show Repeating Options
☐ Show Assigned To Grid
☐ Show Invitation Type
☐ Show Contacts Grid
☒ Show Task in Task List
☐ Show Provider Group
☒ View or Link Transactions

Comments

*Description Appointment

*To Accept Task All Assignees Accept Task

☐ Record Attendance
☒ Remind Me
☐ Do Not Show in Calendar
☐ Pencil In (Mark as Free Time)

Label for Assigned To Grid 2322 Assigned To
Label for Assign Button 2399 Assign
Label for Contacts Grid 2321 Contacts
Calendar Image PS_STATUS_TASK_APPT_ICN

Task Type page (1 of 2)

Field Display Options	
<input checked="" type="checkbox"/> Start Date Required	<input checked="" type="checkbox"/> Start Date Visible
<input checked="" type="checkbox"/> Start Time Required	<input checked="" type="checkbox"/> Start Time Visible
<input checked="" type="checkbox"/> End Date Required	<input checked="" type="checkbox"/> End Date Visible
<input checked="" type="checkbox"/> End Time Required	<input checked="" type="checkbox"/> End Time Visible
<input type="checkbox"/> Location Required	<input checked="" type="checkbox"/> Location Visible

PIM Integration Options	
Outlook Task Type	Appointment
Lotus Notes Type	Appointment
Modified	04/06/2004 2:16PM PDT CHARPER
<input type="button" value="Modify System Data"/>	

Task Type page (2 of 2)

Task Type

The options you select on this page control the options that are available on the Task Detail page.

Task Type	Enter the type of the task.
Application Usage	Select the application where the task type is used. A value of <i>All Applications</i> indicates a universal type that is available to all applications.
Active	Select to make the task type active. Users can only create tasks for active task types.
To Accept Task	Select to indicate whether all of the assignees need to work on the task or only one assignee needs to work on the task when the task is assigned to multiple people.
Pencil In (Mark as free Time)	Select to indicate that the task duration is not treated as busy time by the Assignment Engine.
Record Attendance	<p>Select to enable recording of attendance.</p> <p>If this is selected, the Task Details page shows a column of check boxes in the Invitee/Assignee grid for users to indicate whether the Invitee/Assignee attended the meeting. This check box is usually selected for meeting task types.</p>
Show Repeating Options	Select to enable the user to select the frequency and time period in which this task repeats.
Do not show in Calendar	<p>Select to suppress the task from the user's calendar.</p> <p>This option is cleared by default.</p>

Note. The task appears in the user's calendar only if this option is cleared *and* the user enters a start and end date and time for the task.

Show Assigned to Grid and Label for Assigned to Grid	<p>Select to have the assigned to grid appear on the Task Detail page.</p> <p>If you select Show Assigned to Grid, then the Label for Assigned to Grid field becomes enterable for you to change the grid label that appears on the Task Details page. By default, the system displays <i>Assigned To</i>. This value comes from the message catalog.</p>
Show Invitation Type	Select to have the Invitation Type column appear in the Invitees grid on the Task Detail page.
Show Contacts Grid and Label for Contacts Grid	<p>Select to have the contacts grid appear on the Task Detail page.</p> <p>If you select Show Contacts Grid, then the Label for Contacts Grid field becomes enterable for you to change the grid label that appears on the Task Details page. By default, the system displays <i>Contacts</i>. This value comes from the message catalog.</p>
Label for Assign Button	Select a value to change the label for the Assign Button that appears on the Task Details page. By default, the system displays <i>Assign</i> . This value comes from the message catalog.
Show Task in Task List	<p>Select to have the task appear in the task list for the task owner and all assigned users.</p> <hr/> <p>Note. Do not select this option for the Task Type of <i>Service Order</i>, since Service Order activities should be viewed and updated directly from the Service Order component, not from the Task List.</p> <hr/>
Show Provider Group	Select to have the Provider Group field appear in the Task Details page.
View or Link Transactions	<p>Select to have the View or Link Transactions link appear on the Task Detail page when the user adds a task of this type.</p> <hr/> <p>Note. Do not select this option for the Task Type of <i>Service Order</i>, since the link has not been designed to work on the Task Detail page for that Task Type.</p> <hr/>
Calendar Image	Enter the name of the image that identifies the task type in the task list and calendar.

See *Enterprise PeopleTools 8.50 PeopleBook: System and Server Administration*, "Using PeopleTools Utilities"

Field Display Options

Start Date Required, End Date Required, Start Time Required, End Time Required, and Location Required	Select the fields that are required for this task type.
--	---

Start Date Visible, End Date Visible, Start Time Visible, End Time Visible, and Location Visible

Select the fields that are visible for this task type. If you indicate that a field is required, you must also indicate that it is visible. However, a field can be visible but not required.

PIM Integration Options

Select the task type that displays on a PIM (personal information managers) for this task type. If you license Infosync Server, specify a task type that corresponds to the current task type in your PIM (Outlook or Lotus Notes).

See your current Infosync Server documentation for more information.

Defining Task Priorities

Access the Task Priority page (Set Up CRM, Common Definitions, Task Management, Task Priority, Task Priority).

Task Priority

Priority Setup

Customize | Find | | First 1-3 of 3 Last

Task Priority

Audit

*Code	Default	Active	*Long Description	*Short Description	Image Name	Image		
1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	High	High	PS_STATUS_URGENT_ICN		!	
2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Medium	Medium				
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Low	Low				

Task Priority page

- Code**

Enter a code to identify the task priority.
- Default**

Select one priority as the default for all tasks.
- Active**

Select to indicate that this task priority is active. Only active priorities are available to assign to tasks.
- Image Name**

Select the image that represents the priority visually. If defined for a task priority, the image appears on the My Tasks list for each task that has that priority.

See Also

Chapter 23, "Working with Tasks," Creating Tasks or Updating Task Details, page 437

Defining Task Group Templates

Access the Task Group Template - Type page (Set Up CRM, Common Definitions, Task Management, Task Group Template, Task Group Template).

Task Group Template

Task Group

Task Group Template

APPR

☒ Active

Clone

Application Usage

Support

*Description

Approve Request

Task Types

Customize | Find | First 1-2 of 2 Last

Type

Duration

*Task Type	*Priority	*Subject	Task Owner	Assigned To	Location	Description		
Change Approv	Medium	Technical Approval	Robert Lynch			Description	+	-
Change Approv	Medium	User Approval	Robert Lynch			Description	+	-

Modified

03/27/2009 6:06PM PDT

SAMPLE

Task Group Template - Type page

Task group templates ensure that all tasks that must be completed to accomplish the goal that is assigned. For example, the task group Install Hardware might consist of three tasks: Installation, Test Install, and Installation Acceptance. This is particularly useful when the tasks are performed by different people with different reporting relationships.

When a user schedules a task group, the task group template creates and assigns each task within the group.

Task Group

Active Select to activate the group template.

Application Usage

Select the application or component for which the group template can be used. Values are:

- *All Applications*
- *Change Management*
- *Field Service*
- *HR Helpdesk* (Human Resources Helpdesk)
- *HelpDesk*
- *Higher Education*
- *Lead*
- *Marketing Events*
- *Opportunity*
- *Personal Information Mgmt* (personal information management)
- *Sales*
- *Strategic Planning*
- *Support*

Note. If you select *Change Management*, *HelpDesk*, *HR Helpdesk*, *Strategic Planning* or *Support* the system displays the Duration tab. You can use this page to enter offset days, duration days, and start and end times. For *Change Management*, you enter only days, hours and start use codes.

Task Group Template - Type

Use this section to add tasks to the group template. For each task, specify default values that pertain to the selected usage: task type, priority, task name (subject), provider group, task owner, assignee, location, and task description (for *Change Management*, *HR Helpdesk*, *HelpDesk* and *Support*). These values appear as default when the corresponding group template is selected at runtime and are can be updated.

Note that the Provider Group column will only be visible and editable on a row if the corresponding Task Type definition has been configured to show this field.

Note. If the default task owner and assignee are not specified in the task group template, at runtime, the logged on user becomes the default task owner and no assignees are pre-populated. The owner can update task information, add and delete task entries as necessary.

Defining Task Durations

Access the Task Group Template - Duration page (Set Up CRM, Common Definitions, Task Management, Task Group Template, Task Group Template).

Task Group Template

Task Group

Task Group Template
☒ Active

Clone

Application Usage

*Description

Task Types

Customize | Find | | First 1-2 of 2 Last

Type

Duration

*Task Type	*Priority	*Subject	Offset Days	Duration Days	Start Time	End Time		
<input type="text" value="Change Approval"/>	<input type="text" value="Medium"/>	<input type="text" value="Technical Approval"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="Change Approval"/>	<input type="text" value="Medium"/>	<input type="text" value="User Approval"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Modified 03/27/2009 6:06PM PDT SAMPLE

Task Group Template - Duration page

Use this page to specify a duration for each task. If the task type requires a start or end time (for example, meetings), you must enter these fields. The specific fields that appear on this page are dependent on the task type. This tab appears only when you select *Change Management*, *HelpDesk*, *Strategic Planning* or *Support* from the Application Usage field.

Note. For Strategic Planning, the system validates the required fields. For example, Start Time and End Time are required for meetings. The system, however, doesn't validate fields for other application usages.

Offset Days

This field appears only if you selected *HelpDesk*, *Strategic Planning* or *Support* in the Application Usage field.

Enter the number of days that are added to the plan start date to derive the task start date. The task end date is derived from adding the Duration Days to the task start date.

Duration Days, Start Time and End Time

Enter the number of days a task should take as well as the start and end times for each task.

Start Use Code

This field appears only if you selected *Change Management* in the Application Usage field.

Select one of these values to indicate when a task should start:

- *Current Phase Start*
- *Next in Sequence*
- *Prior Phase Start*
- *Prior Task Start*

Managing Tasks

This section lists common elements and discusses how to:

- Set task defaults.
- Enter additional filtering criteria.
- View task lists.
- Create tasks or update task details.
- Add persons.
- View or update task notes.
- Link transactions to a task.

Common Elements Used in this Section

History

The History drop-down list box displays a list of the task management pages that you accessed during the current session. Select a listed page to transfer to that page.

Pages Used to Manage Tasks

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
My Tasks	RB_TSK_MY_TASKS	My Tasks, My Tasks	View the list of tasks that are assigned to you. You can select a task and view its details or add a task.
My Tasks - User Preferences	RB_TSK_PREF_SEC	My Tasks Click the Preferences toolbar button in the My Tasks component.	Set defaults for tasks that you create and for how the My Tasks list appears.

Page Name	Definition Name	Navigation	Usage
Task Details	RB_TSK	<ul style="list-style-type: none"> Click a listed task on the My Tasks page. Click the Add Task toolbar button on the My Task page. Select a task type and click the Add Task button on the My Tasks page. 	Create a task or update task details.
Task Repeating Options	RB_TSK_REPEAT_SEC	Click the Options button next to the Repeats field on the Task Details page.	Specify the frequency with which a task repeats. This page is accessible only if you select the Show Repeating Options check box for the task type on the Task Type page.
My Tasks - Notes	RB_TSK_NOTE	Select the Notes tab on the Task Details page.	View or add notes to a task.
Related Objects for the Task	RB_TSK_TXNS	Click the View or Link Related Objects link on the Task Details page.	Link related transactions to a task.

Viewing Tasks

Access the My Tasks page (My Tasks, My Tasks).

My Tasks

My Accounts | My Contacts | My Calendar | Add Contact | Add Task | >> [Personalize](#)

Folders

- My Tasks
- All My Tasks
- Group Tasks

My Folders [Add](#)

My Tasks

Tasks: All Open Tasks

Search

Complete Reassign Take Ownership

Move To: Go

Select	Priority	Type	Subject	My Status	Task Status	Location	Start Date	Contact	Owner
<input type="checkbox"/>	!	✓	Installation Acceptance	Assigned	Open		06/22/2007		Spencer Underwood
<input type="checkbox"/>	!	✓	Signoff	Assigned	Open		07/16/2007		Spencer Underwood

☐ Check All / Clear All

Complete Reassign Take Ownership

Move To: Go

*Task Type: Meeting [Add Task](#)

My Tasks page

Note. The My Tasks component has its custom setup for populating the grid with tasks and meetings, and it does not support the automatic grid population options that are available in the Configurable Search Setup (RB_FILTER_DEFN) component. The only grid initialization option that the My Tasks component supports is *Do not populate the grid*, which is also its default option.

When you access the My Tasks page, items of the grid are displayed based on the default filter that appears in the Tasks field. When you select a different filter, the system populates the grid with items that meet the new filter criteria.

Toolbar



Folder Counts

Click to show the number of active tasks in each personal folder. The folder count appears as a number in parentheses after the folder name. Folder count values will only be recalculated when this button is clicked.

Folder counts do not appear for the *Group*, *Direct Reports*, *My Sales Team*, or *Delegated* folders.



Options

Click to access the My Tasks - User Options page, where you can choose the default filter, default folder, and transaction type for the task list, or delegate your tasks.

Formatting Conventions for Folders

Folder names have these formatting conventions:

- Orange highlight indicates the currently selected folder.

- Click the Folder Counts toolbar button to display task counts for folders. A number in parentheses after the folder name indicates the total number of active tasks in the folder. Folder counts will only be updated by clicking the Folder Counts toolbar button.

If you move the cursor over the folder name, pop-up text lists the number of unread entries in addition to the total number of entries.

Folders

My Tasks	Click to display task entries owned by or assigned to the user that have not been moved to other folders. You can move task entries into personal folders from the My Tasks view. You can also move tasks from any previously created personal folder back to the My Tasks folder or to another personal folder.
All My Tasks	Click to display all task entries from the My Tasks folder and any personal folders that you have created.
Direct Reports	Click to display only the task entries of your direct reports (as defined on the worker record). This folder appears only if the current user has direct reports. When you use the direct reports view of your task list, the Direct Report drop-down list box appears so that you can further filter the list to display only entries for a specific person whom you supervise, or for all direct reports at once.
My Sales Team	Click to display only the task entries of your sales team. This folder appears only if the current user is a sales manager (as defined by the Territory Tree). When you use this view of the task list, the Team Member drop-down list box appears so that you can further filter the list to display only entries for a specific person on your team, or for all team members at once.
Group Tasks	Click to display only task entries that are associated with a provider group to which you belong. This folder appears only if the current user belongs to at least one provider group. When you use the group tasks view of your task list, the Provider Group drop-down list box appears so that you can further filter the task list to display only entries for a specific provider group to which you belong, or for all provider groups at once.
Delegated	Click to display only task entries that have been delegated to you. This folder appears only if you have task items delegated to you from other users. When you use the delegated view of your task list, the Delegator drop-down list box appears so that you can further filter the task list to display only entries for a specific person whose tasks have been delegated to you.

My Folders

Add	Click to access the My Tasks - Add Folders page, where you can name and create a new personal folder.
------------	---

Edit	Click to access the My Tasks - Manage Folders page, where you can rename or delete a personal folder. Note that you cannot delete a folder that contains one or more active (open) tasks. This button only appears if you there is at least one personal folder to manage.
<Folder Name>	Click to view the contents of a personal folder.

My Tasks

The task priority indicator appears as a column on the left of this grid if the default priority is not assigned to the task. The task type icon appears in the column immediately to the left of the subject column.

See [Chapter 23, "Working with Tasks," Defining Task Priorities, page 425](#) and [Chapter 23, "Working with Tasks," Defining Task Types, page 422](#).

Use the following field to filter which tasks should be included in the search results:

Tasks	Select a filter to view only tasks that meet the filter criteria. The available filters are: <ul style="list-style-type: none"> • <i>All Open Tasks</i> • <i>Meetings This Week</i> • <i>Meetings Today</i> • <i>Overdue Tasks</i> • <i>Tasks This Month</i> • <i>Tasks This Week</i> • <i>Tasks Today</i> • <i>Tasks Tomorrow</i> <p>By default, all open tasks, appointments, and meetings appear in the task list. You can click the Options button to select a different default filter.</p>
--------------	--

The search results (task list) grid displays the relevant tasks that fit the filter criteria for the search that has just been executed, and includes these fields:

Priority	Displays the task priority
Type	Displays the task type of the task.
My Status	Indicates whether the task is assigned to you and whether you accepted or rejected the task.
Task Status	Indicates the task status.
Contact	Displays the primary contact for the task or meeting.

Owner Displays the task owner.

In addition to the search results, the following actions may be performed on any of the search results:

Complete Click this button to complete the selected task(s).

Reassign Click this button to reassign the selected task(s).
This button is enabled in all folders except the Group Tasks folder. Before a Group Task can be reassigned, one of the group members must take ownership.

Take Ownership This button is only enabled when viewing the Group Tasks folder. When clicked, it will set the task owner to the currently logged in user.

Move To,Go Move the selected task(s) to any other personal folder (My Tasks or any user-defined folder).
The Move To drop down list and corresponding Go button are only visible when in My Tasks or other personal folders.

A new task may be created by using the following fields:

Task Type Select a task type for the task you wish to add.

Add Task Click to add a task of the selected type.

Entering Additional Filtering Criteria

Expand the Search region of the My Tasks page.

My Tasks page [search area]

Enter one or more search criteria to filter the results by the criteria entered. To modify the columns that appear in the My Tasks grid, click the Personalize Filter link. On the Personalize Search Settings page, select or clear the check box for the appropriate column.

Task Status prompt 

Click to display a list of task statuses. Choose one or more statuses to filter the task list by those statuses.

Show in Results

Select one or more roles to display only tasks for which you have the selected roles.

Personalize Filter

Click to access the Personalize Search Settings page, where you can modify the columns that appear on the My Tasks grid.

Setting Task Defaults

Access the My Tasks - User Options page (click the Options toolbar button in the My Tasks page of the My Tasks component.)

My Tasks

User Options

My Tasks

*Default Filter

All Open Tasks

Default Folder

My Tasks

Task Details

*Start Time Interval

60 Minutes

*Duration

60 Minutes

My Calendar

*Calendar View

Daily

Delegates

Delegated by Burt Lee

*Start Date	*End Date	*Task List	*Delegate Type	Delegate Name		*Task Type	Read Only	Include Private	
09/21/2009	09/25/2009	Terry Murphy	Individual	Stephen Ray		* All *	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Add Delegate

Delegated by Supervisor

Only your supervisor can change these delegations.

Start Date	End Date	Delegate Type	Name	Task Type	Read Only
09/01/2009	09/11/2009	Individual	Ian Steward	Meeting	<input type="checkbox"/>

OK

Cancel

* Required Field

My Tasks - User Options page

Use this page to personalize how tasks and calendar items appear in the My Tasks component and to set defaults for tasks that you create. The Default Filter option controls which tasks appear in the task list when you first access the component.

Note. You can also set these defaults under My Personalizations, General Options.

My Tasks

Default Filter Select the filter to determine the type of transaction that you want to see when you first access your task list for a particular browser session.

Default Folder Select the folder that you want to see when you first access your tasks for a particular browser session.

Note. Changes to either of these settings will only appear on the My Tasks page after logging out and back into the system.

Delegates

Use the Delegated By [Name] grid to delegate your task entries to another worker or to a provider group for a specified period of time. Supervisors may also delegate the task entries of their direct reports. When tasks are delegated to another worker, he or she will see your tasks in the Delegated folder on his or her My Tasks page.

Start Date	Specify the start date for task delegation.
End Date	Specify the end date for task delegation.
Task List	Indicate the task list whose items you wish to delegate. <hr/> Note. This field only appears for supervisors, and allows them to define delegation of their own tasks, the tasks of one of their direct reports, or the tasks of all of their direct reports. <hr/>
Delegate Type	Indicate if you are delegating tasks to a provider group or to an individual.
Name	Specify the name of the provider group or of the individual to whom you wish to delegate the tasks.
Task Type	Indicate the task type that you wish to delegate.
Read Only	Select this option to allow the delegated provider group or individual read-only access to the tasks. <hr/> Note. A sales manager will have owner access even for tasks delegated to his team members with read-only access. <hr/>
Include Private	Select this option to allow the delegated provider group or individual access to your personal tasks. <hr/> Note. A supervisor may not delegate the personal tasks of a direct report. <hr/>

Use the Delegated By Supervisor grid to view any delegation of your tasks that has been made for you by your supervisor. Workers cannot change these entries: they may only view them.

Creating Tasks or Updating Task Details

Access the Task Details page (click a listed task on the My Tasks page).

Task Details
History Select One...

Save | Options | Add New Task | Next | Previous | My Accounts | >>
Personalize

Subject Meeting with Hollingsworth Edme
Owner Burt Lee
Status Open
Company

Task Details | Notes

Task Details

***Subject** Meeting with Hollingsworth Edme

***Status** Open ☐ Private

***Start Date** 06/06/2010

***End Date** 06/06/2010

***Owner** Burt Lee

***Repeats** Does Not Repeat Options

Reminder

Description

***Task Type** Meeting

***Priority** Medium

Time Zone PST

Location

Lead [Haas Engineering](#)

[View or Link Related Objects](#)

Task Details page (1 of 2)

Invitees
Customize | Find | First 1 of 1

Name	Reassign	Role	Status	Attendance
Jack Edme	Reassign	Individual Consumer	Assigned	<input type="text"/>

First Name Last Name Invite

Contacts
Customize | Find | First 1 of 1

Name	Role	Telephone	Primary
Hollingsworth Edme	Individual Consumer	925/694-6767	<input checked="" type="checkbox"/>

First Name Last Name Add

Audit History

Created	02/06/2006 3:41PM PST	By BLEE	Burt Lee
Modified	09/04/2009 9:05AM PDT	By BLEE	Burt Lee

Save | Options | Add New Task | Next | Previous | My Accounts | >>
Top of Page

* Required Field

Task Details page (2 of 2)

Task Details

Subject	Enter the meeting subject that appears on the My Tasks list.
Task Type	Select a task type if you access this page from the toolbar. If you access this page from the My Tasks page, the system displays the task type you select on the My Tasks page.
Status	Select the status of the task from the list of available statuses: <i>Cancelled</i> , <i>Completed</i> , <i>In Progress</i> , and <i>Open</i> .
Private	Select to permit only the task owner to access task details.
Start Date, Start Time, End Date, and End Time	<p>Enter the starting and ending dates and times of the task.</p> <hr/> <p>Note. If a task already has a start date and an end date, changing the start date (or start time) will also change the end date (or end time) by an equal amount (to maintain the original duration of the task). You may change this defaulted end date or time value, if desired.</p> <hr/>
Provider Group	<p>Enter the name of the provider group that owns this task. A task must be associated with a provider group or an individual owner (or both).</p> <hr/> <p>Note. This will only be visible on a task if the corresponding Task Type definition has been configured to display this field. If this field is not visible for a particular task, a value in the Owner field will be required.</p> <hr/>
Owner Name	Enter the name of the individual task owner. The owner might not actually perform the task, but is responsible for task completion. If the task is also associated with a provider group, then only members of that provider group will be available as choices for the owner: otherwise any worker may be selected as an owner.
Repeats	Select the reoccurrence frequency for the task.
Options	Click to access the Task Repeating Options page (RB_TSK_REPEAT_SEC) configure the settings for the repeating task.
View or Link Related Objects	<p>Click to link a company, lead, opportunity, or partner to the task. This link appears only if View or Link Transactions was selected on the Task Type page. Clicking this link accesses the Related Objects for the Task page (RB_TSK_TXNS) where you can search for and select objects to link to the task.</p> <hr/> <p>Note. If you select a company, lead, opportunity, or partner on the Related Objects for the Task page, the name appears as a link above the View or Link Related Objects link. If you click the name of the company, lead, opportunity, or partner, the system takes you to the page where the object was originally established. If a company has one or multiple contacts, the system still takes you to the Company page.</p> <hr/>

<Invitees / Assignees>

The label of this grid changes depending on the task type. As delivered, the label is *Invitees* for the *Meeting* task type and *Assigned To* for task types *Activity*, *Approval*, and *Mtg*.

The systems displays different information in this section based on how you configured the Task Type page. You can add this grid to add task types or modify the labels using the Task Type page.

Display Name	Enter the name of the person to whom the task is assigned or who is invited to the meeting.
Reassign	Click to replace the meeting invitee with another contact. The system sends the new invitee an email. The system removes the task from the original invitee's task list.
Create	Click to create the meeting invitee as a contact in the CRM system. For invitees who are not available in CDM, the Create button is presented for you to add the invitee as a contact using Quick Create. <hr/> Note. If CDM integration is enabled, the duplicate prevention logic is triggered when you click the Create button. The Evaluate Duplicate Person page appears if it finds duplicate entries that resemble the contact you are about to add. You can select an existing match from the list that returns, or choose to create a new person record for that invitee in CDM. <hr/>
Role	Select the person's role. The company name that the person represents appear in the list, as well as other roles the person has, such as <i>Individual Consumer</i> .
Status	Indicates the status of the task assignee: <i>Assigned</i> , <i>Accepted</i> , or <i>Declined</i> .
Attendance	Select <i>Absent</i> or <i>Attended</i> . This field is available only if you select Record Attendance on the Task Type page.
Invitation Type	Select whether the invitation is <i>Mandatory</i> , <i>FYI</i> , or <i>Optional</i> for the invitee. This column appears only if the Show Invitation Type field is selected for this task type on the Task Type page.
Contacts	
Primary	Select to indicate that the contact who is listed in the row is the primary contact for this task. There is only one primary contact for a task, and the primary contact name appears for the task when it is listed on the My Tasks page.

Adding Persons

To add a person to either the Invitees grid or the Contacts grid, enter a first and last name below the grid and click the Invite or Add button.

If the first and last name do not uniquely identify a person, the Search For Contact page appears. Select one or more listed persons and click Select.

Search For Contact

▼ Search

First Name

begins with

D

Last Name

begins with

Perry

Company

begins with

Phone

begins with

Email

=

Address

begins with

City

begins with

State

=

Postal

=

Country

=

Search

Clear

Cancel

Select Action

Create Contact

Go

Search Results

Select	Last Name	First Name	Name	Phone	Email
<input type="checkbox"/>	Perry	Daniel		415/694-2001	crm_work
<input type="checkbox"/>	Perry	David	Adventure 54	516/694-2001	crm_cust

☐ Check All / Clear All

L

Select

Search For Contact page

The selected persons are added to the task and you are transferred back to the Task Details page. You can also enter new search criteria or return to the Task Details page without making any selections.

The task owner and assignee can reassign the task by changing the person name in the assignee box.

See Also

[Chapter 23, "Working with Tasks," Setting Up Task Management, page 421](#)

Viewing or Updating Task Notes

Access the My Tasks - Notes page (select the Notes tab on the Task Details page).

See [Chapter 5, "Working with Notes and Attachments," page 135.](#)

Linking Transactions to a Task

Access the Related Objects for the Task page (click the View or Link Related Objects link on the Task Details page).

Task Details

Related Objects for the Task

Transactions

No Transactions have been added.

Transaction

Company

Company

291

Add Transaction

[Return to Task Details](#)

Transactions for the Task page

When you select a transaction type, the text that appears next to the Add Transaction button changes to reflect the transaction type.

- Primary

Select to designate that this is the primary transaction that is associated with the task. The system displays this task on the Task Details page in the field above the View or Link Related Objects link.
- Transaction

Select a transaction type.
- Add Transaction

Select to choose a transaction from a list of transactions for the selected transaction type.

Viewing Calendars

This section discusses how to view calendars.

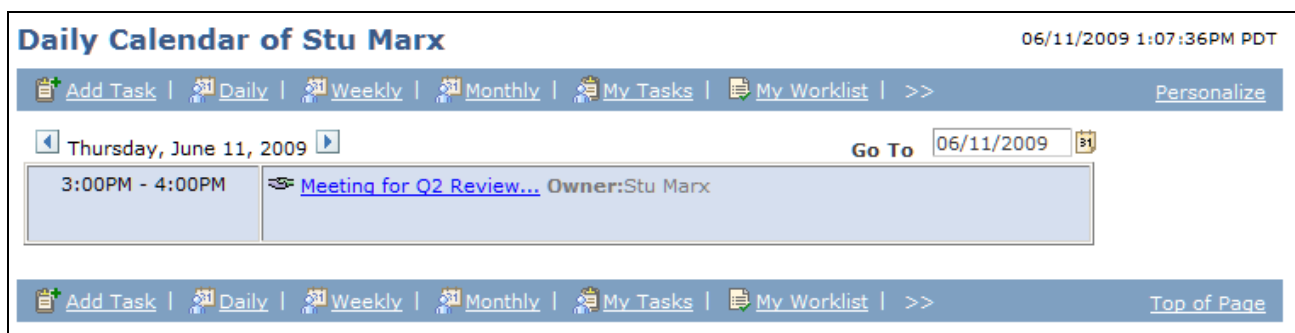
Pages Used to View Calendars

Page Name	Definition Name	Navigation	Usage
Daily Calendar of <name> Weekly Calendar of <name> Monthly Calendar of <name>	RB_TSK_CALENDAR	<ul style="list-style-type: none">My Calendars Click the Daily, Weekly, or Monthly toolbar buttons.My Tasks Click the My Calendar toolbar button. Click the Daily, Weekly, or Monthly link.	View or update a calendar.

Page Name	Definition Name	Navigation	Usage
Daily Team Calendar of <name> Weekly Team Calendar of <name> Monthly Team Calendar of <name>	RB_TSK_CALENDAR	On the daily, weekly, or monthly calendar, click the View My Team's Calendar link.	View calendar entries for other individuals.
Another's Calendar for <name>	RB_TSK_CAL_SRCH	On the daily, weekly, or monthly calendar, click the View Another's Calendar link.	Search for another person to view his or her calendar.
Provider Group Calendar of <name>	RB_TSK_CALENDAR	On the daily, weekly, or monthly calendar, click the View Provider Group's Calendar link.	View a provider group's calendar.
My Calendar - Options	RB_TSK_PREF_SEC	My Calendar Click the Options button on the toolbar in the My Calendar component.	Set the default calendar view (daily, weekly, or monthly).

Viewing or Updating Calendars

Access the Daily [or Weekly or Monthly] Calendar of <name> page (My Calendars. Click the Daily, Weekly, or Monthly link).



Daily Calendar of <name> page

See [Chapter 16, "Using Calendars," page 255](#).

Viewing Another Person's Calendar

Access the View Another's Calendar for <name> page (click the View Another's Calendar link on the daily, weekly, or monthly calendar).

Another's Calendar for Steve Moss




Use Search Criteria to Narrow the Search Results

Select the Person's Calendar to View	
Name	Department
Alan Bailey	Sales and Services
Rider Bookie	Sales and Services
Alice Teirney	Sales and Services
Frank Peterson	Sales and Services
Steve Moss	United States Operations

[My Calendar](#)

▼ Search




Use Saved Search

[Basic Search](#)
 [Save Search Criteria](#)
 Delete Saved Search
  [Personalize Search](#)

Person ID begins with
 First Name begins with
 Last Name begins with
 Name begins with
 DeptID begins with
 Department begins with

▼ Show in Results

☒ Person as Sales Manager

[Basic Search](#)
 [Save Search Criteria](#)
 Delete Saved Search
  [Personalize Search](#)

Another's Calendar for <name> page

Select the Person's Calendar to View

Search for the person whose calendar you want to see. You can click a person's name to view their calendar or refine the search criteria and search again.

Show in Results

Select one or more listed relationships. Only those persons who meet the search criteria and have the selected relationships to you appear in the search results.

Chapter 24

Working with Call Reports

This chapter provides an overview of call reports in PeopleSoft CRM and discusses how to:

- Add call reports.
- Add related objects to the call report.

Understanding Call Reports

Sales call reports document a contact event such as a meeting, demonstration, or phone call. They are always produced after the event and are follow-up memos documenting the attendees, what took place during the event, and any follow-up tasks.

You can view or add call reports directly to a company, consumer, contact, lead, opportunity, or task from the Call Reports tab on these components. When you add a call report to a lead, opportunity, or task, the call report is linked to the customer for the lead, opportunity, or task.

You can view call reports for a customer or contact from the Call Reports tab on the Customer 360-Degree View page or access call reports directly from the left hand navigation. If you have licensed PeopleSoft CRM Portal Pack, you can view your own call reports in the My Call Reports pagelet that you can add to your home page by using the Personalize link.

The Call Report component is enabled for the Service Oriented Architecture (SOA), which enables you to call the Call Report web service to create, retrieve, and update call reports from both PeopleSoft and external systems.

See *PeopleSoft Enterprise CRM Portal Pack 9.1 PeopleBook*, "PeopleSoft Enterprise CRM Portal Pack 9.1 Preface."

See [Appendix B, "Delivered Web Service and Service Operations for CRM Common Components," Call Report Web Service, page 583.](#)

Working with Call Reports

This section lists the pages used to access call reports and discusses how to add call reports.

Pages Used to Work with Call Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Call Report Details	RD_CALL_REPORT	<ul style="list-style-type: none"> Click My Contacts. Select a contact. Then select <i>Add Call Report for Contact(s)</i> in the Action field and click Go. Sales, Add Call Report Sales, Search Call Reports 	<p>Add, search, or update a call report.</p> <p>Note. You can also navigate to the Call Report Details page from the Call Reports page in the Company, Person, Partner Company, Lead, or Opportunity components.</p>
Company - Call Reports Partner Company - Call Reports	RD_CALLRPT_LST_TXN	<ul style="list-style-type: none"> Customers CRM, Search Company, Company Select the Call Reports tab. Partners CRM, Search Partner Company, Partner Company Select the Call Reports tab. 	View a list of call reports for a company or partner company.
Person - Call Reports	RD_PRSN_CALL_RPTS	Customers CRM, Search Person, Person, Call Reports	View a list of call reports for a consumer or contact.
Lead - Call Reports Opportunity - Call Reports	RSF_CALL_RPTS	<ul style="list-style-type: none"> Sales, Search Leads, Leads Select the Call Reports tab. Sales, Search Opportunity, Opportunity Select the Call Reports tab. Partners CRM, Search Partner Company, Partner Company Select the Call Reports tab. 	View or add call reports on a lead or opportunity.

Page Name	Definition Name	Navigation	Usage
Related Objects for the Call Report	RD_CALLRPT_TXNS	Click the View or Link Related Objects link in the General Information section on the Call Report page or on the Call Report Details page.	View a list of related objects (companies, leads, opportunities, and partner companies) for the call report or add a related object to the call report.

Adding Call Reports

Access the Call Report page (Click My Contacts. Select a contact. Then select Add Call Report for Contact(s) in the Action field and click Go).

Call Report Details

[Save](#) | [Add New Call Report](#) | [My Accounts](#) | [My Contacts](#) | >> [Personalize](#)

Company [Lexco Telecom Inc.](#)

General Information

*Subject

Date

*Event Type

Location

[View or Link Related Objects](#)

Notes Summary

[Customize](#) | [Find](#) | [View All](#) | [Print](#) | [First](#) | [1 of 1](#) | [Last](#)

Select	Subject and Details	Attachment(s)	Added By	Date Added	
<input type="checkbox"/>	Project Update		Anton Weiss	03/01/2004 1:26PM	

☐ [Check All / Clear All](#)

|

Call Report Details page (1 of 2)

Contacts						
Select	Primary	Name	Phone	Company	Email Address	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Kyle Warner	001-555/452-1001	Lexco Telecom Inc.	kwarner@warnerhousehold_hitech.com	

☐ [Check All / Clear All](#)

Add Contact

First Name

Last Name

Select

Follow-up Tasks

No Follow-up Tasks have been added.

Audit History

Created	03/01/2004 1:29PM PST	By	AWEISS	Anton Weiss
Modified	02/23/2009 5:17PM PST	By	BLEE	Burt Lee

Call Report Details page (2 of 2)

General Information

Enter information that describes the event.

Event Type Select one of these values: *Face to Face Meeting*, *Telephone*, or *Other*.

View or Link Related Objects Click to access the Related Objects for the Call Report page where you can view or add related companies, leads, opportunities, and partner companies.

Add a Note and Notes Summary

Enter notes and attachments that relate to the event.

See [Chapter 5, "Working with Notes and Attachments," page 135](#).

Contacts

View the list of contacts that attended the event and designate the primary contact.

Email Call Report Select one or more contacts and then click this button to email the call report to the selected contacts.

Note. You must save a call report before you can email it.

Add Contacts

You can add CRM contacts, if necessary, to this call report by entering first and last names. If CDH integration is enabled, the duplicate prevention logic is triggered when you click the Select button. If it finds duplicate entries that resemble the contact you are about to add, you can either select an existing match from the list that returns, or choose to create a new person record in CDM using Quick Create.

Follow Up Tasks

View the list of tasks associated with the event. When you create a follow up task for a call report, its contacts are assigned as the contacts for the task by default.

Add Follow-Up Task Click to access the Task Details page.

See [Chapter 23, "Working with Tasks," page 417](#).

Adding Related Objects to the Call Report

Access the Call Report Details - Related Objects for the Call Report page (click the View or Link Related Objects link in the General Information section on the Call Report page or on the Call Report Details page).

Call Report Details

Related Objects for the Call Report

Related Objects for the Call Report Customize | Find | First 1 of 1 Last

Primary	Related Object	Description
<input checked="" type="checkbox"/>	Company	Lexco Telecom Inc.

Related Object Company Company Add Related Object

[Return to Call Report Details](#)

Call Report Details - Related Objects for the Call Report page

Select a related object; either *Company*, *Lead*, *Opportunity*, or *Partner*. The field to the right changes based on your selection. Select the related object. Click the Add Related Object button.

Click the Return to Call Report Details link to go back to the Call Report Details page.

Part 7

Entitlement Management

Chapter 25

Setting Up and Managing Agreements and Warranties

Chapter 26

Defining Pricing Information for Services and Support Offerings

Chapter 27

Performing Entitlement Searches for Cases and Service Orders

Chapter 25

Setting Up and Managing Agreements and Warranties

This chapter lists common elements, provides overviews of agreements and warranties, agreement pricing, how agreements and entitlements are used in PeopleSoft Order Capture, and discusses how to:

- Define service levels.
- Define entitlements.
- Define entitlement plans.
- Define agreement templates.
- Define agreements.
- Define warranties.
- Generate sales leads for agreement renewal.

Understanding Agreements and Warranties

This section lists common elements and discusses:

- Agreements and warranties.
- Default agreements.

Common Elements Used in This Chapter

Scope

Select the scope of the agreement. Values are:

Site: Indicates that the agreement applies to sites that are specified on the Scope Details page.

Note. For PeopleSoft Order Capture the system only allows *Site* as the scope for agreement templates when Available for Ordering is selected as an option.

Contact: Indicates that the agreement applies to named callers that are specified on the Scope Details page.

Note. Although agreements with a scope of *Contact* are not available for selection on service orders, you can select agreements of either *Site* or *Contact* as scope for cases.

If you create a case and associate it to an agreement (regardless of the scope) and then create a service order from that case, you must first select an agreement for the new service order; so the agreement from the case is not defaulted to the service order.

Max. Contacts (maximum contacts) or Maximum Number of Contacts

Enter the maximum number of named callers one can specify on the Scope Details page. This value is applicable to agreements with a scope of *Contact*.

Provider Group and Group Member

Select the default provider group and group member to perform the service request that is covered by this agreement. You can change these values on the service order.

Renew Agreement

Click to create a copy of the agreement that is about to expire. The CRM system sets the start date of the new agreement to the day after the end date of the old agreement and the new end date equal to the new start date plus the same number of days as the original agreement. You can establish new start and end dates for the renewed agreement and modify the information as necessary.

Payment Terms

Select when payment is due. Payment terms in PeopleSoft CRM are synchronized with the payment terms from PeopleSoft Financials.

Purchase Option

Select the method of purchasing the service or support offering for an agreement transaction. The prompt displays the purchase options (for agreement transactions) that are defined for the selected service, product or service-product combination in its pricing record on the Pricing Information page. The options for an agreement pricing record are:

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.

Note. The *T&M* (time and material) purchase option only applies to agreement service or agreement case transactions, and on demand service or on demand case transactions; it is not applicable to agreement transactions.

Agreements and Warranties

In PeopleSoft CRM, *agreements* reflect service or support contracts. *Warranties* define the coverage that is offered for a particular item that is installed at a customer's site. Both warranties and agreements define the services or support that the customer is entitled to and the duration of the contract.

- **Agreements:**

Agreements also define the price of services or support offerings that are covered by the agreement, and the price of the agreement itself.

You may associate an agreement or agreement template with multiple products; however, if you have an integration to PeopleSoft Contracts that you activated on the Installation Options – Billing and Pricing Options page, you can only have one product per agreement or agreement template line. If you are not using the Contracts Integration feature, the save-edit check is disabled and you can enter multiple rows of data in the Product grid of the agreement line.

You can define three types of agreements:

- **PeopleSoft Field Service**

In a field service agreement, you specify what products in which customer sites are entitled to the service that is selected in each agreement line. An agreement can have one or multiple agreement lines, each of which also contains pricing and entitlement information. Each site on an agreement is assigned a site identification number (SIN) to identify whether a service can be performed at a particular location.

- **PeopleSoft Support**

Support agreements reference products on agreement lines. Similar to field service agreements, support agreements define customer sites that are entitled to support offerings. Support agreements can also define which people can contact your call center agents for support. Each named caller that is listed on an agreement is assigned a personal identification number (PIN) to identify the person as a valid caller when that person calls for support. You can define a support agreement for sites or for named callers, but you cannot define an agreement that includes lines for both sites and named callers.

- **PeopleSoft HelpDesk**

Help desk agreements represent an agreed upon level of service that an organization provides to its employees. Service level agreements define the response and restore times that the help desk will try to meet while responding to requests for service from employees. In addition to response and restore times, help desk agreements can define employees, products, installed products, priorities, sources of contact (phone, email, fax, and so on), departments, locations, and roles. Help desk agreements give agents the ability to associate an agreement line to a help desk case. Help desk agreements search against employee, products, installed products, plus other criteria such as case priority. An agreement can have one or multiple agreement lines, each of which also contains products, entitlements, and the various components that apply to the entitlements (role, department, priority, and so on).

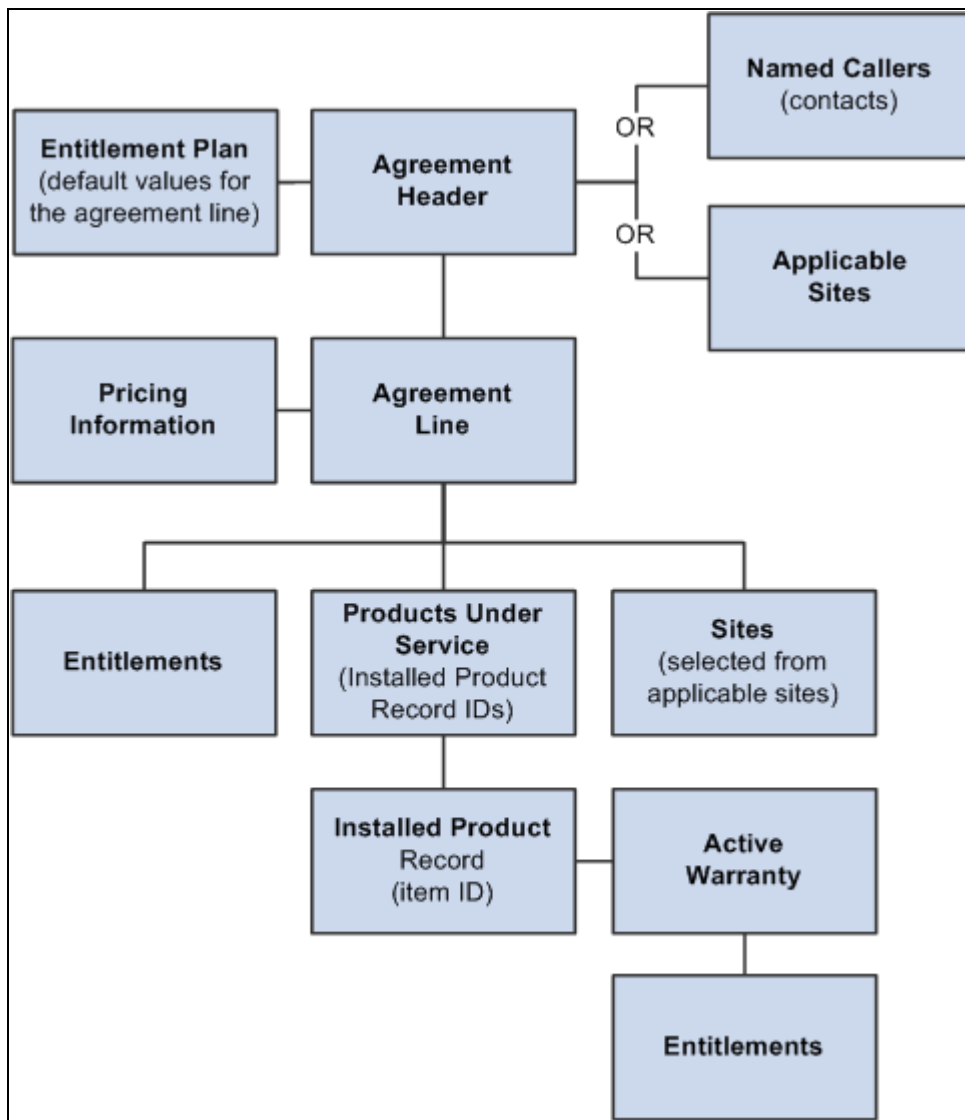
- **Warranties:**

You define the duration of the warranty and the entitlements that are owed to customers with covered products. You can associate warranties with items on the Item Definition page. For specific items that are installed at a customer's site, you can activate the warranty on the customer's installed product by using the Installed Product component.

Note. Warranties are not listed for PeopleSoft HelpDesk agreement search results

When searching for a customer's entitlements for a case or a service order that references an installed product, the CRM system matches agreements and warranties based on response time — either ascending or descending depending on setup option in Agreement Search Configuration page.

This diagram shows the data model for agreements and shows the relationship between agreements and warranties:



Agreement data model

See Also

[Chapter 27, "Performing Entitlement Searches for Cases and Service Orders," page 531](#)

Default Agreements

PeopleSoft CRM enables you to create two types of default service level agreements:

- Non-customer specific agreements:

These types of agreements do not have any specific customers associated with them. They apply to all customers. For example, assume you create an agreement for a specific customer called ABC Enterprises and then create another agreement that is non-customer specific. Both of these agreements would potentially apply to a case that is opened for ABC Enterprises.

Only the non-customer agreement would apply to a case opened for another customer. The non-customer specific agreement may have agreement lines that specify a particular service or a service and product combination (for use in PeopleSoft Integrated FieldService). They may also specify lines for a particular product or list of products (for use in PeopleSoft Support) or specify levels of support that apply as default levels regardless of the service or product on the case.

Because they apply to all services and all products, these lines would not have a specific service or product associated with them. A non-customer specific agreement cannot have pricing data associated with it, except you can write-in values of *free* for prepaid quantities.

The user may enter a number in the Prepaid Quantity field and select a value (case, service order, or hour) in the Prepaid Unit field, both of which would define the number of free units (either cases, service orders, or hours) that are associated with that agreement. The idea is that the user gets a certain quota of free services automatically with the default agreement as represented in the Prepaid Quantity and Prepaid Units fields.

You must define non-customer specific agreements with the agreement category of *External – No Pricing*.

- Customer-specific agreement.

These agreements contain agreement lines with no product and no service and are only valid for agreements with the *External - No Pricing* agreement type. An agreement that lists a specific customer may also contain default lines with no service and no product. These agreements are meant to apply to all cases and service orders, regardless of the service or product value of the case or service order. This means that a default agreement line with associated service level entitlements can be associated for a particular high-value customer to cover all its cases, perhaps at a higher service level than provided for in a non-customer specific agreement default line. A default line on a customer-based agreement that has no product and no service cannot be priced.

Note. Only customer-specific agreements are shown on the agreement section of the 360-Degree search page for a particular customer.

Understanding Agreement Pricing

This section discusses:

- Pricing record retrieval.
- Line price calculations.
- Total price calculations.
- Price recalculations.
- Uncoupling service pricing from an agreement.

Note. You can use PeopleSoft CRM to calculate agreement prices. In PeopleSoft Support, agents can accept payment by credit card at the time of the transaction regardless of whether an agreement is associated with the support case.

Pricing Record Retrieval

The CRM system can retrieve five types of pricing records for the agreement line: agreement, agreement service, agreement case, on demand service, and on demand case.

Agreement pricing records define the fee that is paid for a specific service or support offering. The agreement price is paid when the agreement is issued to or signed by the customer. Agreement service pricing records define what the customer pays when the work that is associated with the service or support offering on the agreement is performed—that is, the price paid per transaction that is covered by a line item in the agreement. Likewise, agreement case pricing defines the amount payable by the customer for logging a case.

The CRM system only retrieves pricing records that are defined for the currency that is specified when you define the agreement. You cannot change the currency unless you clear the defined line pricing values.

For field service agreements, you define pricing records for a service or a service and product combination. When you create a line for a field service agreement, you can retrieve the price for the agreement. When you specify a prepaid purchase option, you must specify the prepaid quantity. The rate on the agreement pricing record that matches the criteria that you enter is used to calculate 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 that is covered by the agreement line.

For support agreements, the functionality is similar. You can create agreement pricing and agreement case pricing records that define support rates for specific products. When you create a support agreement, the same logic (used in field service agreements) is also used in support agreement to retrieve base line price.

See Also

Chapter 26, "Defining Pricing Information for Services and Support Offerings," page 523

Line Price Calculations

This section describes line pricing calculations in detail.

Entitlement Adjustment

The CRM system adjusts the base line price or prepaid rate that is retrieved from the pricing record to account for uplifts and discounts that are associated with the entitlements on the agreement line. The uplift and discount percentage values are totaled and applied to the base line price using this formula:

Entitlement Adjusted Base Line Price = Base Line Price \times (1 + (sum of entitlement discount and uplift percentage values))

For example, the CRM system returns a base line price of 100 USD for an agreement line with three entitlements. The first entitlement has an uplift of 10 percent, the second an uplift of 15 percent, and the third a discount of 5 percent. The entitlement-adjusted base line price is calculated as:

Entitlement Adjusted Base Line Price = $100 \text{ USD} \times (1 + (0.1 + 0.15 - 0.05)) = 100 \text{ USD} \times 1.2 = 120 \text{ USD}$

Installed Product Quantity

When the agreement purchase option is flat, the entitlement-adjusted price on the agreement line applies to each installed product that is covered by the agreement line. The applicable installed products are listed on the Agreement Line page. To determine the installed product quantity, the CRM system adds the values in the quantity field of each referenced installed product.

Flat Purchase Pricing Calculation

To calculate the final line price on an agreement line that uses a flat purchase option, PeopleSoft CRM:

1. Calculates the base line price by adjusting the rate on the agreement pricing record for the number of installed products and agreement duration.

For example, if the pricing record rate is \$20 per year per installed product, the agreement line duration is two years, and there are three installed products, the base line price is $\$20 \times 2 \times 3 = \120 .

2. Adjusts the base price for entitlement adjustments.
3. Applies any manual adjustments.

Manual adjustments are either expressed as a percentage or as a dollar amount.

This formula is used:

Final Line Price (for flat rates) = Base Line Price \times Entitlement Adjustment + Manual dollar amount adjustment or \times Manual percentage adjustment

Prepaid Purchase Pricing Calculation

To calculate the final line price on an agreement line that uses a prepaid purchase option, the CRM system calculates the entitlement adjustment for the line and applies it to the base line price. The prepaid rate 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:

Final Line Price (for prepaid rates) = Prepaid Rate \times Prepaid Quantity \times Entitlement Adjustment

Any manual adjustments that exist for the line are also applied to the final line price.

Total Price Calculations

The total price is calculated by adding the final line prices on the associated agreement lines. Additionally, a final uplift or discount percentages can be applied to the base price of the agreement. For example, if the CRM system calculates a base price of 2,000 USD for the agreement and you have entered a discount of 10 percent, the CRM system calculates a total price of 1,800 USD for the agreement.

Price Recalculations

If you modify the entitlements on an agreement line, change the installed product quantity for an agreement line, or update the start and end dates of the agreement line after agreement line pricing has been calculated, the change you made is not automatically reflected in the final line price, though edit messages issued when the user saves a changed agreement will prompt the user to have the system update the price or leave the price unchanged.

In other words, if the values of the variables (for example, entitlement adjustment and agreement duration) that are used to calculate the current final line prices do not match the ones that are captured for the new calculation, the price of the agreement is no longer accurate. You can then recalculate the final price for the agreement lines as needed and update the total agreement price for the agreement.

Uncoupling Service Pricing from an Agreement

PeopleSoft CRM enables you to uncouple service pricing from an agreement for PeopleSoft Support and PeopleSoft Integrated FieldService. This enables you to define prepaid agreement with zero pricing, without having to set up service pricing first.

In addition to the *External* and *Internal* agreement categories, there is an agreement category called *External – No Pricing*. This category enables you to set up prepaid agreements without pricing. To create a flat zero dollar agreement, you can use either the *External* or *External – No Pricing* agreement category.

PeopleSoft CRM, however, recommends using the *External – No Pricing* agreement category, as the system bypasses the pricing logic and does not display a pricing warning message. This enables you to create an unlimited number of cases or service orders. To create a prepaid agreement with no pricing, use the *External – No Pricing* category. The system hides the Order Capture Created check box in the agreement header, but you can still define prepaid purchase options.

By having the Prepaid Quantity field on the agreement header level, it enables you to have a pool of prepaid quantities per agreement across agreement lines. The system displays the prepaid fields only when the category is *External – No Pricing*.

Once a prepaid agreement is active and used on a case or service order, changing the prepaid quantity will not do anything. The system sets the Prepaid section to read only after the agreement has been used by the case or service order, when the remaining quantity is less than the prepaid quantity. When the agreement is renewed, the system uses the same prepaid quantity, remaining quantity, and prepaid total as the old line.

The Product grid displays the prepaid purchase option defined for each product. The prepaid option at the agreement header level and the Product grid level cannot coexist, however. You need to either define the total pool of prepaid purchase options for the whole agreement or the prepaid purchase options per product.

In addition, you can define the prepaid option on the line level for service-related agreements. For service-related agreements, the prepaid option can only be specified on the agreement header, line level, or product level. For support-related agreements, you can only specify the prepaid option on the agreement header or the product level. The prepaid option on the line level doesn't apply to support-related agreements, it only applies to service-related agreements.

Understanding Ordering and Service Management of Agreements

PeopleSoft Enterprise Order Capture and Order Capture Self Service support the ordering of service agreements. Like any standard product or package, a service agreement can be added directly to an order by a customer service representative (CSR). Or, it can be added as a cross-sell or up-sell opportunity of an existing product in the order—a way to boost company sales.

Cross-sell of Agreements in Orders

The CRM product model provides the framework for establishing relationships between products and service agreements, which is the an important step for setting up cross-sell or up-sell offerings. You can associate a service agreement with one or more products using the Product Relationships component. When one of these products is added to an order, its associated service agreement appears on the order as well as a cross-sell or up-sell opportunity.

This screenshot shows an order of a phone product (Nokia 3360), and this phone product is associated with a service agreement (PHONEREPLACEMENTPLAN) as displayed on the Cross/Up Sell Opportunities section:

Order

Submit Save | Validate | Convert to Bulk | Add Order | Search | >> Personalize

Order ID New
Customer [Softgear Inc.](#)
Contact [Ted Pepper](#)

Order Status New Order
Customer Value Platinum ★★★★★
Credit Rating

Entry Form Line Details Holds Notes Related Actions History Fulfillment

Go To Select One...

Line Details Find | View All First 1 of 1 Last

Product Nokia 3360	Line 1	Total Price 0.00
Product ID TEL000016	Add Note	Recurring List Price
*Unit of Measure Each		Net Recurring Price 0.00
Order Qty 1.0000	Availability Check Failed Refresh	List Price 0.00
Unit Price 0.00	View Adjustments	Discount Taken 0.00
Promotion Code		Discount Percentage 100.00
Partial Shipments Single Shipment		Minimum Price 100.00
		Lead Time 0
		Selling Status Current

Order of a phone product with an associated service agreement (1 of 2)

Line Relationship

No Line Relationship is defined.

[Relate to Customer's Installed Service](#)
[Relate to Line on Order](#)

Manual Price Adjustments

Adjustment Pct/Amt Adjustment Type

Replace/Cascade Adjustment Target

Adjustment for Recurrence

Cross/Up Sell Opportunities

		Product Description	Product ID	Relationship Description
		3G USIM	TEL000009	Child Of
		2G SIM	TEL000011	Child Of
		PHONEREPLACEMENTPLAN	TEL000028	Agreements

Configuration and Attributes

Product Brand Category

Transfer Model Nbr

Nokia 3360

Nokia 3360 1 @ 0.00/EA

Order of a phone product with an associated service agreement (2 of 2)

PeopleSoft provides the ability to associate a product with a service agreement, associate multiple products with the same service agreement, and drive the up-sell offering of agreements when purchasing other products.

Note. If an agreement template is set to be available for ordering, a corresponding product definition will be created automatically for ordering purposes when the template is saved.

For agreement templates that are available for ordering, or if the integration to PeopleSoft Contracts is enabled in your system, you can only specify one product and one service in each agreement template line. If an agreement template contains multiple lines with services that are applicable to the same product (for example, phone line repair service and phone line maintenance service for product ID 12000, and you order the service agreement product that was created for that agreement template, you're purchasing all services that are available to the product in the template.

Pricing of Agreements in Orders

Pricing of a service agreement product is dynamic in that it depends upon which products are being covered on the order by the agreement. A CSR can add additional customer-purchased products to be covered by the agreement product by referencing the customer's installed products to the agreement product order line. This functionality is not extended to self-service users.

Note. The Order Capture applications limit the purchase of one agreement per standard product ordered. For example, if a customer orders a computer and the computer is covered by two agreements on the order, the computer can only be covered by one or the other agreement, but not both.

Calculation of Agreement Duration in Orders

When a service agreement is added to an order, the system computes its duration automatically and it is not available for edit. Based on the choice that the CSR makes to whether create a new agreement (leave the *NEXT* value in the Agreement Code field) or use an existing agreement (specify an agreement ID in the Agreement Code field) in the order line for service agreement, the start and end dates are calculated differently:

- New agreements:

When ordering a service agreement, the system defaults the start date to the current date. The agreement template referred to by the order will have a duration. This duration is used in conjunction with the agreement start date on the order to calculate the new agreement's end date.

- Existing agreements:

The system fills in the end date with the end date of the existing agreement and use the current date as the start date.

Agreement Entitlements

After an order has been submitted and the corresponding business process or business project completed, a new agreement is created for the service agreement product. This new agreement inherits several default values from the agreement template that is associated with the service agreement product, such as duration and entitlements.

This screenshot shows an agreement that is created after the completion of the business project, which was triggered upon order submission:

Agreement

[Save](#) | [Search](#) | [Add Agreement](#) | [Next](#) | [Previous](#) | [360 360-Degree View](#) | [Personalize](#)

Agreement Code AGR3 **SetID** COM01
Customer [Softgear Inc.](#) **Customer Value** Platinum ★★★★★
Contact [Ted Pepper](#) **Status** Active
Category External **Scope** Site

[Agreement](#) | [Scope Details](#) | [Line Defaults](#) | [Agreement Line](#)

[View Line Summary](#) | [Line Details](#) | [Installed Products](#) | [Sites](#)

Agreement Line Details

[Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

Line 001 **Status** 2-Active
Start Date 09/04/2009 **End Date** 09/03/2011
Description
Service

Products

[Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

[Products](#) | [Transaction Price](#)

Product ID	Description	Purchase Option	Prepaid Quantity	Prepaid Rate	Prepaid Unit	Base Line Price	Base Line Price Unit
TEL000016	Nokia 3360	Flat					

Valid Sites

[Customize](#) | [Find](#) | [First](#) | [1 of 1](#) | [Last](#)

Select Line Site	Site ID	Description
Site	250021	Midwest Branch Office

Products Under Service

[Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

	Installed Product ID	Description	Serial Number	Asset Tag	Qty	Site
<input type="checkbox"/>	INS0251240	Nokia 3360	73095158836940045331		1.0000	Midwest Branch Office

[Add Installed Product](#) | [Delete Selected Installed Product](#)

Creation of an agreement after the ordering of a service product agreement is completed

For agreement templates that are available for ordering, the default entitlement set (specified on the Line Defaults page) is used in all template lines and is not modifiable at the line level. For templates that are not orderable, entitlements can be updated on a line-by-line basis if necessary. The same is true for agreements. For those that are generated based on orderable agreement templates, the same set of entitlement is used as the default in each agreement for its lines. Whereas in agreements that are based on non-orderable templates, entitlements can be modified at the agreement line level.

Service Management of Agreements

One of the tasks of the business process or business project that runs after the submission of an order is to create a new installed product for the service agreement being purchased. The installed product (of type *Agreement*) can be used to perform any agreement-related service requests, including renewing, cancelling, suspending and resuming agreements, using the Service Management component.

This screenshot shows an installed agreement that is created after the completion of the business project, which was triggered upon order submission:

Installed Product

[Save](#) | [Search](#) | [Add Install Product](#) | [360-Degree View](#) | [Personalize](#)

SetID COM01
Installed Product ID INS0251240
Type Agreement
Site
Asset Location

Customer [Softgear Inc.](#)
Contact [Ted Pepper](#)
Asset Department
Product PHONEREPLACEMENTPLAN
Customer Value Platinum ★★★★★

[Installed Product](#) | [Attributes](#) | [History](#) | [Links Summary](#)

Customer Information

Customer [Softgear Inc.](#)
Contact [Ted Pepper](#)
Site
[Show Details](#)

Product Information

[Main](#) | [More](#)
Product Group
Product ID TEL000028
Description PHONEREPLACEMENTPLAN
Item ID
Item Description
Install Type Sold
Date Installed 09/04/2009

Status	Reason	Quantity	UOM
Active		1.0000	

[Add Status](#)

Purchase Information

Audit History

Created	By	Stu Marx
09/04/2009 12:06PM PDT	VP1	
Modified 09/04/2009 12:06PM PDT	By VP1	Stu Marx

Creation of an installed agreement that is created after the ordering of a service product agreement is completed

This screenshot shows a service management order that is created for an installed agreement:

Manage Service

|

[Personalize](#)

Order ID New **Order Status** New
Customer [Softgear Inc.](#) **Credit Rating**
Contact [Ted Pepper](#)

Go To

Customer
Customer [Softgear Inc.](#) **Contact**
[Search Again](#)

▼ Header Details
Business Unit COM01 - Communications ***Status**
Fulfill By **Selling Date**

Line Summary

Line	Line Action	Reason	Product Description	List Price	Unit Price	Start Date	
1	<input type="text" value="Suspend"/>	<input type="text" value="On Vaca"/>	PHONEREPLACEMENTPLAN	0.00	0.00	09/04/2009	<input type="button" value="Delete"/>

Product Entry
 [Show Add Products](#)

Creation of a service request for an installed agreement

Supported actions include *suspend*, *suspend/resume*, *cancel* and *renew*.

See *PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook*, "Tracking Installed Products," Understanding Installed Products and *PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook*, "Working with PeopleSoft Service Management," Understanding Service Management.

Defining Service Levels

This section provides an overview of service levels and service level suspensions and discusses how to:

- Define service levels.
- Create additional cost categories for the service level.

Understanding Service Levels

You can define the hours of operation or prime period of maintenance for the services that your organization offers. For example, you may provide some services only during a 40-hour work week, whereas other services may be provided 24 hours a day.

You can define entitlements for specific service levels, which can then be included on a customer's agreement. When an agreement line with service level entitlements is selected for a case or service order, the system displays the calculated response and restore time.

Note. In general, you can define service levels for each time zone that is covered by your organization. PeopleSoft, however, strongly recommends that you not reset the base time zone in PeopleTools after your system is running and your applications are in production. Resetting the base time zone can cause time reports to be incorrect.

If you reset the base time zone (go to PeopleTools, Utilities, Administration, PeopleTools Options), your users will need to recreate all time-frame related data and update each record to reset the correct time frame for the new base time zone. Users can change the time zone for a particular agreement if they want to display time differently. If users continuously change time zones, however, the system will lose track of what the base time zone is at the time the record is saved (since all time-zone related fields on PeopleTools are stored against the base time zone).

Pages Used to Define Service Levels

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Service Level	RF_SERVICE_LEVEL	Set Up CRM, Common Definitions, Entitlements, Service Level, Service Level	Define the authorized hours of operations or prime period of maintenance. These service levels are informational only.
Cost Category Definition	RF_SLVL_COSTCAT	Set Up CRM, Common Definitions, Entitlements, Service Level, Cost Category Definition	Create additional cost categories for the service level.

Defining Service Levels

To define service levels, use the Service Level (RF_SERVICE_LEVEL) component.

Access the Service Level page (Set Up CRM, Common Definitions, Entitlements, Service Level, Service Level).

Service Level

Cost Category Definition

SetID CRM01

Service Level STD

*Description Standard Service Level

*Short Description Standard

Time Zone Pacific Time (US)

*Cost Category Code Straight Time

Holiday Schedule

Defaults

Weekdays

Begin Time

End Time

Weekends

Begin Time

End Time

Apply Defaults

Service Level page (1 of 2)

Service Level Details

Day	Begin Time	End Time	
Monday	8:00AM PDT	5:00PM PDT	Clear
Tuesday	8:00AM PDT	5:00PM PDT	Clear
Wednesday	8:00AM PDT	5:00PM PDT	Clear
Thursday	8:00AM PDT	5:00PM PDT	Clear
Friday	8:00AM PDT	5:00PM PDT	Clear
Saturday			Clear
Sunday			Clear

Clear all

Comments

This is the standard service level given to most of the household customers.

Service Level page (2 of 2)

- Service Level

Displays the name of the service level that you entered when the service level record was created.
- Description and Short Description

Enter a long and short description. Because these descriptions are displayed in entitlements in which the service level is referenced, enter a meaningful service level description.

Time Zone	Select the appropriate time zone for the authorized hours of operations that you define for the service level. The CRM system populates the time zone code that you select next to the time values that you enter in the Defaults and Service Level Details group boxes. After you save the service level record, the time zone for the service level cannot be changed.
Cost Category Code	Select the cost category code that should apply for work performed during the days and times specified on this page.
Holiday Schedule	<p>Select the holiday schedule that you want to apply to the service level. The system takes holidays into account when calculating required start and end dates for scheduled work.</p> <p>By default, the system places the holiday schedule after the Entitlement grid on the Agreement Line page. Users can override it or clear it out. For platinum customers you can override holiday schedules by clearing them out on agreement lines.</p> <p>The holiday schedule is based on specific dates, so each year you need to modify your existing holiday schedules with new dates or create new ones to re-prompt from the service level and agreement lines. PeopleSoft CRM recommends that administrator update existing dates, especially when re-prompts may affect a large number of agreement lines.</p>

Defaults

Enter the begin and end times for the weekdays and weekend days that you want the system to use for the service level. When you click the Apply Defaults button, the system enters the hours in the appropriate fields displayed in the Service Level Details group box.

Service Level Details

This group box displays the begin and end times for the days of the week associated with the service level. You may change the hours displayed in the fields or clear them all by clicking the Clear button.

Create Additional Cost Categories for the Service Level

Access the Cost Category Definition page (Set Up CRM, Common Definitions, Entitlements, Service Level, Cost Category Definition).

Service Level		Cost Category Definition	
SetID CRM01		Service Level STD	
Description Standard Service Level		Short Description Standard	
Time Zone PST			
<div>Details</div> <div>Customize Find View All First 1-2 of 2 Last</div>			
*Day of the Week	*Begin Time	*End Time	*Cost Category Code
Saturday	8:00AM PDT	5:00PM PDT	Time and Half
Sunday	8:00AM PDT	5:00PM PDT	Double Time

Cost Category Definition page

If you charge different rates for the hours and days worked that were not defined on the Service Level page, use the fields on this page to define additional days, hours and cost categories.

For example, if you charge time-and-a-half for work performed on Saturday, select *Saturday* from the Day of the Week field, enter the hours in the Start Time and End Time fields, and then select *HALF* as the cost category.

Defining Entitlements

This section provides an overview of entitlements and discusses how to define entitlements.

Understanding Entitlements

You define an entitlement record for every response time, restore time, coverage type, or service level that your company intends to offer on customer agreements or warranties. By 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 that are contractually owed to customers who have an installed product that is covered by a valid warranty.

Each entitlement record can specify an uplift or discount to adjust the base price of agreement lines that include the entitlement. When the CRM 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 that are associated with the entitlements on the line.

Page Used to Define Entitlements

Page Name	Definition Name	Navigation	Usage
Entitlements	RF_ENTITLEMENTS	Set Up CRM, Common Definitions, Entitlements, Entitlements, Entitlements	Define entitlements that can be offered on agreements and warranties.

Defining Entitlements

To define entitlements, use the Entitlements (RF_ENTITLEMENTS) component.

Access the Entitlements page (Set Up CRM, Common Definitions, Entitlements, Entitlements, Entitlements).

Entitlements

Entitlement Code PREM-SL SetID CRM01

*Description Premium Service Level

Uplift/Discount 10 %

***Entitlement Type**

☐ Guaranteed Response Minutes

☐ Guaranteed Restore Minutes

☒ Service Level Service Level Premium Service Level

☐ Guaranteed Coverage Coverage Type Length Percent Covered Unit

▶ Audit History

Entitlements page

Description

Enter a description. You can use up to 30 alphanumeric characters.

Important! Entitlement descriptions are displayed at the time of service order and case entry. Enter descriptions that are meaningful to the person who enters the service order or case. Typically, the entitlement description describes the response time, restore time, coverage, or service level that is 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

Enter the percentage of uplift or discount to add to the price of agreement lines that include this entitlement. Enter discounts with a minus sign that precedes the amount; enter uplifts without a minus or plus sign.

Entitlement Type

Specify the category of entitlement that is defined by the entitlement code together with the entitlement details that are associated with the selected category.

Guaranteed Response and Minutes

Select to entitle the customer to a response within the specified number of minutes. PeopleSoft Integrated FieldService uses the guaranteed response time to calculate the start date and time for service orders, if the automatic calculation feature is enabled at the business unit level. If the feature is disabled, agents can manually determine the customer preferred start date and time for service orders based on this information.

Call center cases also display and use the guaranteed response time from an associated agreement line entitlement.

Guaranteed Restore and Minutes

Select to entitle the customer to restored functionality of the product within the specified number of minutes. PeopleSoft Integrated FieldService uses the guaranteed restore time to calculate the committed end date and time for service orders, if the automatic calculation feature is enabled at the business unit level. If the feature is disabled, agents can manually determine the customer preferred end date and time for service orders based on this information.

The service order can have several types of begin and end times. The guaranteed restore entitlement is used to calculate the committed end date and time. Other end times include *customer preferred*, which are optional fields that are manually entered if the customer has a preferred date and time for service, such as a weekend. There are also *planned* end dates and times, which refer to the expected completion of each activity within a service order that are based on service begin type and activity duration.

Call center cases also display and use the guaranteed restore time from an associated agreement line entitlement.

Service Level

Select to entitle the customer to a specific service level or prime period of maintenance. Service levels are established on the Service Level page. PeopleSoft Integrated FieldService uses the service level that is specified in the entitlement to calculate the start and end dates and times for service orders, if the automatic calculation feature is enabled at the business unit level.

Service levels from an associated agreement line entitlement (in conjunction with guaranteed response or restore minute entitlements) are also used to calculate specific response and restore times for a call center case.

Guaranteed Coverage

Select to entitle the customer 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, either *Day*, *Week*, *Month*, or *Year*.

Coverage Type

Select a coverage type if you select *Guaranteed Coverage* as the entitlement type. Values are:

Expenses: The portion (specified in the Percent Covered field) of any expenses that are associated with completing the customer's service order that is not charged to the customer.

Material: The portion (specified in the Percent Covered field) of the cost of any materials that are required to complete the customer's service order that is not charged to the customer.

Time: The portion (specified in the Percent Covered field) of the cost of any labor required to complete the customer's service order or case that is not charged to the customer.

See Also

Chapter 25, "Setting Up and Managing Agreements and Warranties," *Defining Service Levels*, page 467

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Creating and Managing Service Orders," Setting Up Automatic Calculation of Dates and Times for Service Orders

Defining Entitlement Plans

This section provides an overview of entitlement plans and discusses how to define entitlement plans.

Understanding Entitlement Plans

Use entitlement plans as default values on agreements or warranties. You can reference a relevant entitlement plan to quickly populate an agreement or warranty with the entitlements that are associated with the plan. You can then delete or add other entitlements as necessary.

Page Used to Define Entitlement Plans

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Entitlement Plan Setup	RF_ENTITLE_PLAN	Set Up CRM, Common Definitions, Entitlements, Entitlement Plan, Entitlement Plan Setup	Define groups of entitlements that can be referenced and populated quickly on agreements and warranties.

Defining Entitlement Plans

To define entitlement plans, use the Entitlement Plan Setup (RF_ENTITLE_PLAN) component.

Access the Entitlement Plan Setup page (Set Up CRM, Common Definitions, Entitlements, Entitlement Plan, Entitlement Plan Setup).

Entitlement Plan Setup

Entitlement Plan Name GOLD
SetID CRM01

*Description Extended Plan

Entitlements								Customize	Find	First	1-6 of 6	Last
*Description	Entitlement Minutes	Service Level	Coverage Type	Percent Covered	Coverage Length	Unit	Uplift / Discount					
Five hour guaranteed response	300						10	+	-			
Eight hour guaranteed restore	480						10	+	-			
Extended Service Level		Extended					15	+	-			
Extended Expense Coverage			Expenses	50	1 Year		5	+	-			
Extended Material Coverage			Material	50	1 Year		5	+	-			
Extended Time Coverage			Time	50	1 Year		5	+	-			

Entitlement Plan Setup page

You can create new or update existing entitlement plans by adding or removing entitlement entries from the plan. When you reference an entitlement plan on an agreement, the system automatically populates the plan's associated entitlement entries to the agreement.

The system, however, does not retroactively update individual entitlements on existing agreement lines or warranties when the corresponding entitlement plan used to create those entries is updated.

For example, if an agreement line was created with an entitlement plan which originally had a response entitlement of *A* and a restore entitlement of *B*, and that plan is subsequently changed to refer to a restore entitlement of *C* rather than *B*, the existing agreement line will still have the original two entitlement values.

Entitlement Plans are only used to default individual entitlements onto other new objects, such as agreement lines or warranties. These individual entitlements may then be modified by the user at any time, and are no longer determined or reset by any changes to the corresponding entitlement plan.

Note. An entitlement plan must have at least one entitlement associated with it.

See Also

Chapter 25, "Setting Up and Managing Agreements and Warranties," Defining Entitlements, page 471

Configuring the CRM System for Agreement Searches

This section provides an overview on agreement searches and discusses how to configure agreement searches.

Understanding Agreement Searches

The Agreement Search Configuration page enables you to configure how the agreement search should function for PeopleSoft Support cases (external case agreement search), PeopleSoft HelpDesk cases (internal case agreement search) and PeopleSoft Integrated FieldService service orders (service order agreement search).

For external and internal agreements, there are separate group boxes for cases and service orders that enable you to instruct the system on how to search for agreements using these options:

- Autoselect the shortest response time from all matches.
- Autoselect the longest response time from all matches.
- Enable the user to choose from all matches.
- Match using case criteria.

If you select Match Using Case Criteria for external agreements (PeopleSoft Support), the system enables you to select case category, case priority, case source, case type, and customer value as the values for the Category field.

If you select Match Using Case Criteria for internal agreements (PeopleSoft HelpDesk), the system enables you to select department, location, priority, role, and source (inbound contact method) as the values for the Category field.

If you do not select the Match Using Case Criteria check box, the system performs the matching based on the radio button you selected. This means that if any agreement lines exist that specify values (criteria), the agreement matching engine ignores those values when selecting matches.

If you select the Match Using Case Criteria check box, the pool of agreement line matches will include any matches based on the criteria in the case and the corresponding criteria on the agreement lines. If two or more lines tie for the shortest or longest response, the system displays all agreement lines to the user.

To be considered a match, the criteria from a case may match any of the criteria conditions listed on the agreement line. For example, if an internal agreement line specifies that it is for high priority cases and the role is supervisor, the system matches the case with this line if the employee's role is supervisor, regardless of whether the case priority is high or not.

If a product is specified on the case, the system matches only agreement lines that have the product and at least one criteria. The system will also match default agreement lines that have no products that match on at least one criteria (if any criteria are present on the agreement line).

The system then filters the pool of agreement lines (and warranties) that are found under this option for presentation to the user according to the radio button option that was selected on the Agreement Search Configuration page.

Note. Because PeopleSoft CRM no longer bases search results on the category weight factor, customers upgrading from a previous release may find that the agreement searching functionality for PeopleSoft HelpDesk may produce slightly different results. Also, now that the system sorts the total list of warranty and agreement line matches by response time, warranty matches do not always appear first in the list of results.

You can use a variety of agreements and agreement line values to set up your PeopleSoft CRM system. These tables summarize the main options that are available:

External Agreement Line Characteristics	Comments
<ul style="list-style-type: none"> • No Product • No Service • No Installed Product • No Criteria 	<p>This default agreement line will always apply regardless of the product or installed product that is linked to the case or service order. This line cannot be priced. It is permitted only for the External - No Pricing agreement category.</p>
<ul style="list-style-type: none"> • Product = 123 • No Service • No Installed Product • No Criteria 	<p>This agreement line applies to any case for product 123, regardless of the installed product value on the case.</p>
<ul style="list-style-type: none"> • Service = ABC • No Product • No Installed Product • No Criteria 	<p>This agreement line applies to any service order, assuming that a service has not been selected on the service order. If a service has already been selected on the service order, this agreement line will only be a match if the service is the same in both places.</p> <p>Note. The Service ID from a service order will be included as part of the matching criteria when selecting entitlements from the service order.</p>
<ul style="list-style-type: none"> • Product = 123 • Installed • Products = 456, 789 • No Service • No Criteria 	<p>This agreement line applies to any case with matching product and installed product values.</p>
<ul style="list-style-type: none"> • Product = 123 • No Service • No Installed Product • Priority = Medium • Customer Value = Silver 	<p>This agreement line applies to any case for the product (regardless of the installed product) where the case priority is medium or the customer value is silver.</p>

External Agreement Line Characteristics	Comments
<ul style="list-style-type: none"> Product = 123 No Service Installed Products = 456, 789 Priority = High Customer Value = Gold 	This agreement line applies to any case that is linked to product 123 and installed product 456 or 789, where the case priority is high or the customer value is gold.
<ul style="list-style-type: none"> No Product No Installed Product No Service Priority = High 	This agreement line applies, regardless of whether the product or the installed product is linked to the case, as long as the case priority is high. This line cannot be priced.
<ul style="list-style-type: none"> Product = 123 Service = Repair Widget No Installed Product No Criteria 	This agreement line applies to any service order for product 123, regardless of the installed product, assuming that the service has not been selected on the service order, or has already been selected as <i>Repair Widget</i> .
<ul style="list-style-type: none"> Product = 123 Service = Repair Widget Installed Product 456, 789 No Criteria 	This agreement line applies to any service order for product 123 and installed product 456 or 789, assuming that the service has not been selected on the service order, or has already been selected as <i>Repair Widget</i> .

Note. Customer, PIN, Person, SIN and Site Matching also apply for customer-based agreements in addition to comments in the table above.

Internal Agreement Line Characteristics	Comments
<ul style="list-style-type: none"> No Product No Installed Asset No Criteria 	This default agreement line applies, regardless of the product or installed asset that is linked to the case.
<ul style="list-style-type: none"> Product = 123 No Installed Asset No Criteria 	This agreement line applies to any case for the product, regardless of the installed asset value on the case.

Internal Agreement Line Characteristics	Comments
<ul style="list-style-type: none"> • Product = 123 • Installed Assets = 456, 789 • No Criteria 	This agreement line applies to any case that matches the product and installed asset values.
<ul style="list-style-type: none"> • Product = 123 • No Installed Asset • Priority = Medium • Source = Phone 	This agreement line applies to any case that is linked to the product (regardless of installed asset), where the case priority is medium or the source is phone.
<ul style="list-style-type: none"> • Product = 123 • Installed Assets = 456, 789 • Priority = High • Department = HR 	This agreement line applies to any case that is linked to product 123 and installed asset 456 or 789, where the case priority is high or the department is HR.
<ul style="list-style-type: none"> • No Product • No Installed Asset • Priority = High 	This agreement line applies, regardless of the product or installed product that is linked to the case, as long as the case priority is high.

Page Used to Configure Agreement Searches

Page Name	Definition Name	Navigation	Usage
Agreement Search Configuration	RF_AG_SRCH_CFG	Set Up CRM, Common Definitions, Agreement Search Configuration, Agreement Search Configuration	Define how the system will search for agreements.

Configuring Agreement Searches

Access the Agreement Search Configuration page (Set Up CRM, Common Definitions, Agreement Search Configuration, Agreement Search Configuration).

Agreement Search Configuration

SetID IPROD

External Case Agreement Search

☒ **User Selects From All Matches**

☐ **Autoselect Shortest Response**

☐ **Autoselect Longest Response**

☐ **Match Using Case Criteria**

Selection Criteria

Category

▼

+

-

Internal Case Agreement Search

☒ **User Selects From All Matches**

☐ **Autoselect Shortest Response**

☐ **Autoselect Longest Response**

☐ **Match Using Case Criteria**

Selection Criteria

*Category

▼

+

-

Agreement Search Configuration page (1 of 2)

Service Order Agreement Search

☒ **User Selects From All Matches**

☐ **Autoselect Shortest Response**

☐ **Autoselect Longest Response**

Agreement Search Configuration page (2 of 2)

Note. The group boxes that appear on this page are dependent on which PeopleSoft applications you have installed. For example, the External Case Agreement Search group box appears only if you have PeopleSoft Support installed. The Internal Case Agreement Search group box appears only if you have PeopleSoft HelpDesk installed. The Service Order Agreement Search group box appears only if you have PeopleSoft Integrated FieldService installed.

External Case Agreement Search

Select one of the options listed to indicate how you want the system to search for agreements when a user selects the Select Agreement or Warranty link on the Case page in PeopleSoft Support.

The values include:

- User Selects From All Matches

The system displays all matches in the pool of agreements or warranties.

- Autoselect Shortest Response

The system displays only the matches from the pool of agreements or warranties with the shortest response.

- Autoselect Longest Response

The system displays only the matches from the pool of agreements or warranties with the longest response.

Match Using Case Criteria and Category

If you do not select the Match Using Case Criteria check box, the system performs the agreement search based on the radio button that you select.

If you select the Match Using Case Criteria check box, the system includes agreement lines that match the criteria that you select in the Category field and the radio button that you select.

For example, if case priority and customer value are listed on the Agreement Search Configuration page, and the agreement line specifies it is for *high* priority cases, or cases whose customer value is *platinum*, the system still matches a high priority case to this agreement line regardless of customer value. The case criteria on an agreement line don't all have to match the values on a case to be considered a match. It is sufficient for just one criteria to match.

If a product is specified on the case, the system matches only agreement lines that match the product and at least one criteria.

The system matches agreement lines to the case for default agreement lines that have no products but match on at least one criteria, if any criteria are present on the agreement line.

Internal Case Agreement Search

Select one of the options listed to indicate how you want the system to search for agreements when a user selects the Select Agreement or Warranty link from the Case page in PeopleSoft HelpDesk.

The system returns all applicable default lines even when there is another match based on product or installed product. PeopleSoft designed the system to do this to give agents the option of selecting an agreement based on a completely different set of criteria.

For example, if you have one agreement line that covers a pocket PC and another default line to cover the role of CEO that does not have a product specified but has a better response time, the system displays both lines. This gives the agent the ability to select either line.

If you select the Match Using Case Criteria check box, you must select one or more categories that you want the system to use in its search. Refer to the previous section for a fuller explanation on using the Match Using Case Criteria and Category fields.

Service Order Agreement Search

Select one of the options listed to indicate how you want the system to search for agreements when a user selects the Select Agreement or Warranty link from the Service Order page in PeopleSoft Integrated FieldService.

Defining Agreement Templates

To define agreement templates, use the Agreement Template (RF_AGREETEMP) component.

This section provides an overview of agreement templates and discusses how to:

- Define basic header and billing information for agreement templates.
- Define default entitlement sets.
- Define default agreement lines.
- View and access linked product definitions.

Understanding Agreement Templates

You can define model agreements for specific types of customers, products, or services. When you define an agreement for a specific customer by using the Agreement component, you can reference an agreement template to populate the basic agreement information and then make modifications as necessary.

Note. You can create templates with specific values for certain agreement criteria. However, if you create more than one agreement from the same template, you should change at least some of the criteria that you copied from the template; otherwise, you would have two identical agreements in your system.

Pages Used to Define Agreement Templates

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Agreement Template	RF_AGREETEMP_HDR	Customer Contracts CRM, Agreements, Agreement Templates, Agreement Template	Define basic header and billing information for agreement templates.
Line Defaults	RF_AGREETEMP_ENTL	Customer Contracts CRM, Agreements, Agreement Templates, Line Defaults	Define a set of entitlements to use as default values for the entries that are added on the Template Line page.
Template Line	RF_AGREETEMP_LINE	Customer Contracts CRM, Agreements, Agreement Templates, Template Line	Define default agreement lines.

Page Name	Definition Name	Navigation	Usage
Related Products	RF_AGREETEMP_PROD	Customer Contracts CRM, Agreements, Agreement Templates, Related Products	View and access linked product definitions. Note. The Related Products page appears only if the template is being used with PeopleSoft Enterprise Order Capture

Defining Basic Header and Billing Information for Agreement Templates

Access the Agreement Template page (Customer Contracts CRM, Agreements, Agreement Templates, Agreement Template).

Agreement Template | Line Defaults | Template Line

Template ID: COMPUTER MAINTENANCE PROGRAM | Agreement Category: External
SetID: CRM02

Status Information

*Scope: Site | Maximum Contacts:
*Status: 1-Pending

Coverage

Provider Group: Hardware Western | Group Member: Perry Davidson

Billing Information

Payment Method: Invoice | Payment Terms: Due in 30 Days

Order Capture Information

☒ Available for Ordering | Duration: 1 Years
Product: ☐ Create New | Product ID: AGR04
☒ Use Existing

[▶ Audit History](#)

Agreement Template page

Agreement Category

This field is required on the Add page when you are adding a new agreement. For agreements used in PeopleSoft HelpDesk, you must select *Internal* as the agreement category.

For agreements used in PeopleSoft Support and PeopleSoft Integrated FieldService, select *External* or *External - No Pricing* as the agreement category.

Note. If you select *External - No Pricing* as the agreement category, the system only displays the Status Information and Coverage sections.

Internal Agreement Type

This group box appears only if you select the *Internal* agreement type. Select one or both of the HR Help Desk or IT Help Desk check boxes to designate the types of cases to which the agreement applies.

Status Information

Use the fields appearing in this group box to select the scope and status for the agreement template you are defining.

Note. If you are defining an agreement template for PeopleSoft HelpDesk and you selected *Internal* as the agreement category, only the Status field appears on this page.

Scope

Select either *Site* or *Contact* to indicate the scope of the agreement template. If you select *Contact*, enter the number of contacts in the Maximum Contacts field.

Note. When Available for Ordering is selected as an option in the Order Capture group box, the system only allows *Site* as the scope for agreement templates. This is because PeopleSoft Integrated FieldService only uses *Site* as the scope for this type of agreement for service orders. PeopleSoft call center applications can use either *Contact* or *Site* as the scope.

Status

Select the status of the agreement: *Pending*, *Active*, or *Closed*. There are no system processes that change the status value of the agreement template, but you can manually change the status as necessary. You can only use templates with a status of *Active* to create a new agreement.

Coverage

Select the provider group and provider group member that you want the system to use for the agreement template.

Billing Information

Select the payment terms and payment method that you want the system to use for billing for agreements using the agreement template.

Order Capture Information

Available for Ordering

Select to indicate if the agreement template may be sold through PeopleSoft Order Capture. If this option is selected, the scope of the agreement template must be *Site*.

Duration

Enter the duration for the agreement template.

Since start and end dates cannot be added to the template and the start and end dates are one of the attributes used to price an agreement line, the system uses the Duration field to calculate start and end dates. As such, agreements created from the template will have their own start and end dates.

The system uses the current system date to set the agreement line start date (or the override start date on the order). The system adds the duration to the start date to calculate the end date.

Product and Product ID

Select *Create New* if you want the system to create a new product from the agreement template to represent that template. The system creates a new product ID value when you save the new template. The system sets the description of the product to the template ID. It also sets the service flag on the product to Y for Yes. This enables the agreement to be selected (referenced by product ID) on an Order Capture order.

Select *Use Existing* to select a product from the Product ID field.

Note. If autonumbering is turned off, the system returns an error message when you attempt to save the template.

See Also

[Chapter 27, "Performing Entitlement Searches for Cases and Service Orders," page 531](#)



Defining Default Entitlement Sets













Access the Entitlement Defaults page (Customer Contracts CRM, Agreements, Agreement Templates, Line Defaults).

Agreement Template | Line Defaults | Template Line

Template ID COMPUTER MAINTENANCE Agreement Category External
SetID CRM02

Default Entitlements

Entitlement Plan Name  

Entitlements								Customize	Find	1-6 of 6	First	Last
*Description	Entitlement Minutes	Service Level	Coverage Type	Percent Covered	Coverage Length	Unit	Uplift or Discount					
One day guaranteed response  	1440											+ -
One day guaranteed restore  	1440											+ -
Basic Expense Coverage  			Expenses	25	1 Year							+ -
Basic Material Coverage  			Material	25	1 Year							+ -
Basic Time Coverage  			Time	25	1 Year							+ -
Standard Service Level  		Standard										+ -

▶ Audit History

Line Defaults page

Entitlement Plan Name Select a default entitlement plan. Plans are established on the Entitlement Plan Setup page. The system displays the entitlements in the plan. You can add or delete entitlements to create a specific list for this template.

The PeopleSoft CRM system displays the information that is associated with each entitlement as defined on the Entitlements page.

Note. Setting up plans is optional. You can add individual entitlements directly to the grid. The individual entitlements listed on this page will be defaulted onto each new agreement template line entry that is created from that template.

See Also

[Chapter 25, "Setting Up and Managing Agreements and Warranties," Defining Entitlements, page 471](#)

[Chapter 25, "Setting Up and Managing Agreements and Warranties," Defining Entitlement Plans, page 474](#)

Defining Default Agreement Lines

Access the Template Line page (Customer Contracts CRM, Agreements, Agreement Templates, Template Line).

Agreement Template | Line Defaults | **Template Line**

Template ID: COMPUTER MAINTENANCE PROGRAM. Agreement Category: External
SetID: CRM02

Agreement Line Details Find | View All | First 1 of 1 Last

Line Number: 001
Description: Printer Maintenance
Service: Preventive Maintenance service for Printers

Service Pricing Details

Purchase Option: Prepaid Quantity:

Products Customize | Find | View All | First 1 of 1 Last

Product	Description	Purchase Option	Prepaid Quantity
SR1039		FLAT	

[Audit History](#)

Template Line page

Agreement Line Details

Add rows for each new line.

Line Number Displays the agreement line number. The CRM system automatically increments this number for each row that you add. The agreement line number and description appear on cases that are covered by the agreement line entitlements. Service orders only display the agreement name, not line number.

Service Select the service that is covered by the agreement line. For Field Service agreements, select a service. Support agreements do not reference services. You define services by using the Service component.

The PeopleSoft CRM system prompt displays only services with an active status and for which the Agreement check box has been selected on the Service page.

Note. Since there is no start date on the Template Line page, the system validates that the agreement start date occurs between the offer start date and the offer end date defined for the service on the Agreement Line page, not the Template Line page.

Internal agreement templates also require you to designate the person type and person status. The system uses these to select the agreements that apply to the case. For example, if a contingent worker in active status opens an IT Help Desk case, only agreement lines that have a person type of *Contingent Worker* and a status of *Active* apply.

Service Pricing Details

Define the default criteria for retrieving pricing records for an agreement line.

Purchase Options	Select the purchase options that you want the system to use for the agreement template.
Prepaid Quantity	Enter the number of work units of a service or support offering that a customer pays for in advance. This value only applies to the <i>Prepaid</i> purchase option.
Product, Purchase Options and Prepaid Quantity	<p>Select the product covered by the agreement line, the purchase option, and the prepaid quantity.</p> <p>If you select a service, the CRM system prompt displays all the products that are defined for the service. If no service is selected, the system prompt displays all products that are defined in it.</p> <p>Products are established with the Product enterprise integration point (EIP) or the Product Definition component.</p>

Entitlements

Displays the entitlements that are contractually owed to the customer for this agreement line. This information is initially populated by using the Entitlement Defaults page. The user, however, can modify the entitlements for each line.

Note. If you select the Available to Order field on the Agreement Template page, the system hides the Add row and Delete row buttons on the Entitlements grid. The system copies the entitlement information from the Entitlement Defaults page to each new line. You cannot change these entitlements in the Entitlements grid. This is required to ensure that all template lines, regardless of the product ID entered for each template line will have the same set of entitlements.

This is important when performing a side-by-side comparison of products in the product catalog to determine which service agreement is the best fit for the product selected. Additionally, if you select the Available to Order field, the system defaults the Purchase Option field to *FLAT* and makes it read only, since flat fee is the only type of agreement fee PeopleSoft Order Capture uses for the purchase of agreements. Therefore, it is important to ensure that you have first created flat fee prices for each service or product that you intend to use on an agreement template.

Entitlements Apply To

This group box appears only if you are defining an agreement template for PeopleSoft HelpDesk and you selected *Internal* as the agreement category. Also, the system displays a set of fields based on the options you selected on the Agreement Search Configuration page for the business unit you are using.

For example, if you selected the Match Using Case Criteria check box and then selected *Role*, *Department*, *Priority*, *Source*, and *Location* as categories that you wanted the system to use when searching for agreements, the system would display all of the fields.

Use the fields that appear in this group box to link the response and restore times to the different values for the various fields that can appear on the Case page. For example, if you set the priority for the agreement to low, and a user selects the Select Agreement link on a low priority case, the system displays the respond and restore times that you set up on the Entitlement Defaults page.

If you select *User Selects From All Matches*, *Autoselect Shortest Response*, or *Autoselect Longest Response*, on the Agreement Search Configuration page, the system does not display this group box.

See Also

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Setting Up Products"

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Setting Up Services," Defining Services

Viewing and Accessing Linked Product Definitions

Access the Related Products page (Customer Contracts CRM, Agreements, Agreement Templates, Related Products).

Agreement Template Line Defaults Template Line Related Products			
Template ID MAINTENANCE SetID CRM02		Agreement Category External	
Associated Products Customize Find [Grid Icon] First 1 of 1 Last			
Product ID	Description	Status	SetID
AGRMAINT1	MAINTENANCE	Active	CRM02
▼ Audit History			
Created	06/17/2009 5:25AM PDT	By BSCHELAN	David Perry
Modified	06/17/2009 5:26AM PDT	By BSCHELAN	David Perry

Related Products page

The Related Products page appears only if the template is being used with PeopleSoft Order Capture. The system uses the Related Products page to show all products that point to the template. The system does not display this page until you save the template and navigate to the page from one of the other pages in the Agreement Template component.

To access the Product Definition page, click the link under the Product ID field.

Note. If the Agreement Template is set to a closed status and there are active products in the Related Products tab, the system displays a warning message stating that there are active products associated with the Agreement Template and that inactivating the template may also inactivate the related products.

Defining Agreements

This section provides an overview of agreement definitions and discusses how to:

- Define agreement header information.
- Specify people or sites that are entitled to service or support.
- Specify line defaults.
- Define detailed agreement line information.

- Define billing information.

Understanding Agreement Definitions

When you create a case or service order for a customer and click the Select Agreement or Warranty button, the CRM system searches for agreement lines or warranties that cover the case or service order and displays the associated entitlements.

The CRM system uses the values that you have entered in the fields for product ID, serial number, and either site or SIN to search for agreement line and warranty matches for service orders.

For cases, the CRM system uses the same fields, as well as those for contact or PIN. For both cases and service orders, the entitlement match page also displays any transaction price information that is defined under the terms of the agreement.

Internal agreements define the levels of service that are available to Help Desk and HR Help Desk cases. These cases use the additional information of organizational relationship, as defined by the person type, and worker status to locate and display the levels of service that are defined on the agreement.

External - No Pricing agreements are similar to External agreements, except they do not display pricing-related fields, only prepaid amounts. Using External - No Pricing agreements enables you to specify how many free prepaid cases or services, or hours of support, a customer is entitled to on an agreement. For PeopleSoft Support, you can specify *prepaid* at the agreement header level or in the product grid on the agreement line. For FieldService, you can specify *prepaid* on the agreement header, agreement line for service, or on the product grid on the agreement line.

See Also

[Chapter 25, "Setting Up and Managing Agreements and Warranties," Understanding Agreement Pricing, page 458](#)

[Chapter 27, "Performing Entitlement Searches for Cases and Service Orders," page 531](#)

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Creating and Managing Service Orders," Service Order Toolbar Functions

Pages Used to Define Agreements

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Agreement	RF_AGREEMENT_HDR	Customer Contracts CRM, Agreements, Agreements, Agreement	Define agreement header information.
Scope Details	RF_AGREEMENT_COV	Customer Contracts CRM, Agreements, Agreements, Scope Details	Specify people that are entitled to call center support or customer sites that are entitled to the service that is detailed by agreement lines.

Page Name	Definition Name	Navigation	Usage
Line Defaults	RF_AGREEMENT_ENTL	Customer Contracts CRM, Agreements, Agreements, Line Defaults	Specify the default values to appear on rows that are added on the Agreement Line page.
Agreement Line	RF_AGREEMENT_LINE	Customer Contracts CRM, Agreements, Agreements, Agreement Line	Define detailed agreement line information for each service or support offering.
Billing	RF_AGREEMENT_BILL	Customer Contracts CRM, Agreements, Agreements, Billing	Define agreement billing information.

Defining Agreement Header Information

Access the Agreement page (Customer Contracts CRM, Agreements, Agreements, Agreement).

Agreement

[Save](#) | [Search](#) | [Add Agreement](#) | [Next](#) | [Previous](#) | [360 360-Degree View](#) | [Personalize](#)

Agreement Code AGR-315-COM
Customer [Global Payment Network](#)
Contact
Category External

SetID CRM02
Customer Value Gold ★★★★★
Status Active
Scope Site

[Agreement](#) | [Scope Details](#) | [Line Defaults](#) | [Agreement Line](#) | [Billing](#)

Agreement Information

Agreement AGR-315-COM
***Scope**

Renewal Number 2
Maximum Contacts
Start Date 01/01/2001
End Date 12/31/2010
***Status**

Description
☐ **Order Capture Created**

Customer Information

Customer [Global Payment Network](#)
Contact

Sold To Address

Prefix **Phone**

Contact Site **Extension**

Agreement page (1 of 3)

Internal Agreement Type

☐ HR HelpDesk


☐ IT HelpDesk

Agreement page (2 of 3)

Default Provider Group

Provider Group

Hardware Western



Group Member



Renew Agreement

▶ Audit History

Agreement page (3 of 3)

Agreement Category

This field is required on the Add page when you are adding a new agreement. For agreements used in PeopleSoft HelpDesk, you must select *Internal* as the agreement category. For agreements used in PeopleSoft Support and PeopleSoft Integrated FieldService, select either *External* or *External - No Pricing* as the agreement category.

Note. In the top section of this page the system changes the field label to Category.

Copy From Agreement Template

When you create a new agreement, you can either add all the information to it manually, or base it on an agreement template.

Note. This group box does not appear if the agreement has already been created and saved.

Copy from Template and Template ID

Select a template and then click the Copy from Template button to populate the agreement with information that is established in the selected agreement template.

Note. Because the integration with PeopleSoft Contracts requires certain validations before a user can set the status of an agreement to *Active*, the system does not copy the value of the Status field from the agreement template to the new agreement. The system initially sets the status of the new agreement to *Pending*.

A user can change the status of the agreement to *Active* by taking certain actions; but they cannot create a new agreement with a status of *Active* by copying information from an agreement template.

Agreement Information

Renewal Number	Displays the renewal version of the agreement. When an agreement is first created, this value is set to <i>1</i> . Each time you renew the agreement by clicking the Renew Agreement button, the CRM system increments this value by 1.
Scope and Maximum Contacts	<p>Select either <i>Site</i> or <i>Contact</i> to indicate if the agreement applies to sites or callers (contacts). If you select <i>Contact</i>, enter the maximum number that would be allowed to call within the scope of the agreement.</p> <hr/> <p>Note. These fields do not appear on the page if you are creating an agreement for PeopleSoft HelpDesk and selected <i>Internal</i> as the agreement category when you added the agreement.</p> <hr/>
Status	<p>Select from <i>Pending</i>, <i>Pending Activation</i>, <i>Action Required</i>, <i>Active</i>, or <i>Closed</i>.</p> <p>There are no system processes that change the status value of the agreement, but you can manually change the status. When an entitlement search is performed for a case or a service order, the CRM system includes only agreements with an <i>Active</i> status that are effective on the date that the search is performed.</p> <hr/> <p>Note. When renewing an agreement, you should manually adjust the status of the old agreement to <i>Closed</i> on the date that it expires and ensure that the status of the new agreement is set to <i>Active</i>.</p> <p>For example, if you renew an agreement one week before it expires, the new agreement should have a status of <i>Pending Activation</i>, and the old agreement should retain its status of <i>Active</i> until the renewal date matches the current date. At that point the old agreement status should be set to <i>Closed</i>, and the new agreement status should be set to <i>Active</i>.</p> <p>If you have an integration with PeopleSoft Transaction Billing Processor, the system makes the <i>Pending Activation</i> and <i>Action Required</i> statuses available. Additionally, if you are using this integration, the system changes the status from <i>Pending Activation</i> to <i>Active</i> or <i>Action Required</i> based on the success you have creating a corresponding entry in PeopleSoft Transaction Billing Processor.</p> <hr/>
Order Capture Created	If this check box is selected the agreement was created through PeopleSoft Order Capture.
Contract Details	Click this link to go the Contract Information page. Use this page to view contract information associated with the contracts business unit, general ledger business unit, and contract details. This applies only when integrating to the Contracts module in PeopleSoft Financials.

Internal Agreement Type

This section appears on the page for internal agreements only.

Customer Information

This section does not appear on the page if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

Customer	Click the Search button to select the name of the customer. Customers are established by using the Customer EIP, the Company component (select Customers CRM, Add Company) or the Consumer component (select Customers CRM, Add Person).
Contact	<p>Click the Search button to select the name of the customer's agent. This is the person to contact about agreement administration issues, such as renewing and remitting payment for agreements.</p> <p>You define contacts by using the Contact component or the Contacts page of the Company, Consumer, or Site component.</p>
Contact Site	<p>Select the customer site that is associated with the contact. You establish this relationship by using the Customers page of the Contact component.</p> <hr/> <p>Note. The prompt for this field shows only sites that are associated with the contact.</p> <hr/>
Prefix, Phone, and Extension	Enter the telephone information for the customer's contact. If you select a contact, the CRM system populates these fields with the primary telephone information of the person's role as a customer's contact. You can modify this information as needed.

Contact Information

These fields appear on the page only if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

The contact fields on the main Agreement page for internal agreements are functionally similar to the customer contact fields mentioned above for external agreements. They refer to the person to contact about the agreement administration issues.

Some users may mistakenly assume that the contact listed on the main page of an internal agreement represents the person or worker for whom the agreement was created, or who was covered by the agreement. This field is only used to represent the administrative contact for the internal agreement.

First Name, Last Name, Phone, Location and Search	Click the Search button to select the name of the contact. You define contacts by using the Workforce component (select Workforce, Create Worker).
Prefix, Phone, and Extension	Enter the telephone information for the contact. If you select a contact, the CRM system populates these fields with the primary telephone information of the contact. You can modify this information as needed.

Default Provider Group

Enter the default provider group and group member that get assigned to perform the services that are covered by this agreement.

Note. This group box does not appear on the page if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

See Also

[Chapter 25, "Setting Up and Managing Agreements and Warranties," Defining Agreement Templates, page 482](#)

[Chapter 27, "Performing Entitlement Searches for Cases and Service Orders," page 531](#)

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Company Business Objects"

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Person Business Objects," Defining Consumer Information

Specifying People or Sites That Are Entitled to Service or Support

Access the Scope Details page (Customer Contracts CRM, Agreements, Agreements, Scope Details).

Agreement

Save | Search | Add Agreement | Next | Previous | 360 360-Degree View | >> Personalize

Agreement Code AGR-315-COM SetID CRM02
 Customer [Global Payment Network](#) Customer Value Gold ★★★★★
 Contact Status Active
 Category External Scope Site

Agreement | **Scope Details** | Line Defaults | Agreement Line | Billing

Site ID	Site Name	SIN		
587	Mountain View	SIN0000007	+	-
588	Pleasanton	SIN0000008	+	-
589	San Jose	SIN0000009	+	-

▶ Audit History

Scope Details page

This page varies depending on the scope that is specified on the Agreement page. For agreements with the contact scope, you enter the people who are eligible for support. These agreements are only available to PeopleSoft Support. For agreements with the site scope, you enter sites that are eligible for service. These agreements are available to both PeopleSoft Support and PeopleSoft Integrated FieldService.

Note. This page does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

Named Callers

This grid appears if the selected agreement has a scope of contact. Enter the people who are eligible to request support that is related to this agreement.

Primary	Select if this person is the primary caller.
Name	<p>Enter the name of a person who is entitled to request support that is defined by the agreement lines. Named callers must first be established as contacts by using the Contact component or the Contacts page of the Company, Consumer, or Site component. The number of contacts that you specify cannot exceed the number of maximum contacts that are recorded on the Agreement page.</p> <hr/> <p>Note. For consumer agreements with scope as the contact, the CRM system populates the first row of the Named Callers grid with the name of the customer that is specified on the Agreement page. You can change this value or add additional rows.</p> <hr/>
PIN (personal identification number)	<p>Displays a unique value that is generated by the CRM system for each caller when the agreement is saved. Customers calling to request support under the terms of the agreement provide their PIN to your customer service representative (CSR). The CRM system uses the PIN that the CSR enters on cases to identify the agreement that defines the customer's entitlements.</p> <hr/> <p>Note. The PIN is unique for every person within an agreement. If a person is a named caller on two agreements, this person is assigned two PINs.</p> <hr/>

Valid Sites

This grid appears if the selected agreement has site as the scope. Enter customer sites that are eligible to receive support or services specified on its agreement lines.

Site Name	Enter the name of the site that is covered by this agreement. The CRM system displays the site ID of the selected site automatically.
SIN (site identification number)	<p>Displays a unique value that is generated by the CRM system for each site when the agreement is saved. Customers calling to request service under the terms of the agreement provide the SIN to your CSR. The CRM 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> <hr/> <p>Note. The SIN is unique for every site within an agreement. If a site is valid on two agreements, the site is assigned two SINS.</p> <hr/>

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Site Business Objects"

Specifying Line Defaults

Access the Default Entitlements page (Customer Contracts CRM, Agreements, Agreements, Line Defaults).

Agreement

Save | Search | Add Agreement | Next | Previous | 360 360-Degree View | >> | Personalize

Agreement Code AGR-315-COM

Customer Global Payment Network

Contact

Category External

SetID CRM02

Customer Value Gold ★★★★★

Status Active

Scope Site

Agreement

Scope Details

Line Defaults

Agreement Line

Billing

Default Entitlements

Entitlement Plan Name

Entitlements

Customize | Find | First 1-5 of 5 Last

*Description	Entitlement Minutes	Service Level	Coverage Type	Percent Covered	Coverage Duration	Uplift or Discount
Five hour guaranteed response	300					10 + -
Eight hour guaranteed restore	480					10 + -
Extended Service Level		Extended				5 + -
Extended Expense Coverage			Expenses	50	1 Year	5 + -
Extended Material Coverage			Material	50	1 Year	5 + -

Line Defaults page (1 of 2)

Person Type

☒ Employee

☒ Contingent Worker

☐ Person of Interest

Worker Status

☒ Active

☐ Inactive

Audit History

Line Defaults page (2 of 2)

Note. If you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement, the system does not display the Coverage Type, Percent Covered, Coverage Duration and Uplift or Discount fields. The group boxes with the Person Type and Worker Status check boxes shown in the example above is only relevant for and displayed for internal agreements. It is not displayed for external or external-no pricing agreements

Default Entitlements

Entitlement Plan Name	<p>Select a default entitlement plan to populate the grid initially. You define entitlement plans on the Entitlement Plan Setup page.</p> <p>The list of entitlements in the grid becomes the default entitlement set for each new line that is added on the Agreement Line page.</p> <p>Add or delete entitlements on each agreement line to define the final set of entitlements that is contractually owed to the customer. Each line in the grid is associated with the entitlement information that is defined on the Entitlements page.</p>
Description	Click the Lookup Entitlement Name button to locate entitlements that you want to add to the Entitlements grid.

Note. Any changes that you make to the defaults do not affect any existing agreement lines.

Additional Selections for Internal Cases

Person Type	<p>Select the person type. Available choices are <i>Employee</i>, <i>Contingent Worker</i>, and <i>Person of Interest</i>.</p> <hr/> <p>Note. <i>Person of Interest</i> does not appear for IT Help Desk cases.</p> <hr/>
Worker Status	Select the status of the worker.

See Also

[Chapter 25, "Setting Up and Managing Agreements and Warranties," Defining Entitlements, page 471](#)

[Chapter 25, "Setting Up and Managing Agreements and Warranties," Defining Entitlement Plans, page 474](#)

Defining Detailed Agreement Line Information

Access the Agreement Line page (Customer Contracts CRM, Agreements, Agreements, Agreement Line).

Agreement

Save

Search

Add Agreement

Next

Previous

360 360-Degree View

>>

Personalize

Agreement Code AGR-315-COM

Customer [Global Payment Network](#)

Contact

Category External

SetID CRM02

Customer Value Gold ★★★★★

Status Active

Scope Site

Agreement

Scope Details

Line Defaults

Agreement Line

Billing

View Line Summary

Line Details

Entitlements

Installed Products

Sites

Price Information

Agreement Lines

Customize

Find

First

1-2 of 2

Last

Agreement Line	Description	Service Description	Start Date	End Date	Line Status	
Line 001	Repair PC	Repair services for PCs	01/01/2001	12/31/2010	Active	
Line 002	Repair Printer	Repair Service for Printer	01/01/2001	12/31/2010	Active	

Add Agreement Line

Agreement Line - View Line Summary page

Agreement

Save

Search

Add Agreement

Next

Previous

360-Degree View

>>

Personalize

Agreement Code

AGR-315-COM

Customer

Global Payment Network

Contact

Category

External

SetID

CRM02

Customer Value

Gold ★★★★★

Status

Active

Scope

Site

Agreement

Scope Details

Line Defaults

Agreement Line

Billing

View Line Summary

Line Details

Entitlements

Installed Products

Sites

Price Information

Agreement Line Details

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

Line

001

Status

2-Active

*Start Date

01/01/2001

*End Date

12/31/2010

Description

Repair PC

Service

Repair services for PCs

Service Pricing

Purchase Option

Prepaid Quantity

Prepaid Rate

USD

Prepaid Unit

Base Line Price

USD

Base Line Price Unit

Price Definitions

Price Per Transaction

Purchase Option

Price

USD

Transaction Price Unit

Remaining Quantity

0.00

Agreement Line - Line Details page (1 of 3)

Products

Customize | Find | View All | First 1 of 1 Last

ProductsTransaction Price

Product ID	Description	Purchase Option	Prepaid Quantity	Prepaid Rate	Prepaid Unit	Base Line Price	Base Line Price Unit		
SR1025	ITN Notebook PC Pentium with D	Prepaid	5	65.0000	S.O.	325.00		+	-

Valid Sites

Customize | Find | First 1-3 of 3 Last

Select Line Site	Site ID	Description		
Site	587	Mountain View	+	-
Site	588	Pleasanton	+	-
Site	589	San Jose	+	-

Products Under Service

Customize | Find | View All | First 1-4 of 4 Last

Installed Product ID	Description	Serial Number	Asset Tag	Qty	Site
<input type="checkbox"/> INS0000012	ITN Notebook PC Pentium with D	SR-ID-125487		1.0000	Mountain View
<input type="checkbox"/> INS0000013	ITN Notebook PC Pentium with D	SR-ID-125488		1.0000	Pleasanton
<input type="checkbox"/> INS0000014	ITN Notebook PC Pentium with D	SR-ID-125489		1.0000	Pleasanton
<input type="checkbox"/> INS0000015	ITN Notebook PC Pentium with D	SR-ID-125490		1.0000	San Jose

Add Installed ProductDelete Selected Installed Product

Agreement Line - Line Details page (2 of 3)

Line Entitlements									
Entitlements Customize Find First 1-5 of 5 Last									
*Description	Type	Minutes	Service Level	Coverage	Percent Covered	Duration	Uplift or Discount		
Five hour guaranteed r	Response	300					10	+	-
Eight hour guaranteed	Restore	480					10	+	-
Extended Service Level	Svc Level		Extended				5	+	-
Extended Expense Cov	Coverage			Expenses	50	1 Year	5	+	-
Extended Material Cove	Coverage			Material	50	1 Year	5	+	-

Holiday Schedule

Calculate Final Line Price	
Base Price	325.00 USD
Entitlement Adjustment	35.00 %
Subtotal	438.75 USD
Adjustment (Percentage)	<input type="text"/> %
Adjustment (Amount)	<input type="text"/> USD
	<input type="text"/> Other
Final Line Price	438.75 USD
<input type="button" value="Calculate Final Price"/>	

Agreement Line - Line Details page (3 of 3)

Agreement Line Details						
Find View All First 1 of 2 Last						
Line 001 Status <input type="text" value="2-Active"/>						
*Start Date <input type="text" value="01/01/2001"/>		*End Date <input type="text" value="12/31/2010"/>				
Description <input type="text" value="Repair PC"/>						
Service <input type="text" value="Repair services for PCs"/>						
Products Under Service Customize Find View All First 1-4 of 4 Last						
Installed Product ID	Description	Serial Number	Asset Tag	Qty	Site	
<input type="checkbox"/> INS0000012	ITN Notebook PC Pentium with D	SR-ID-125487		1.0000	Mountain View	
<input type="checkbox"/> INS0000013	ITN Notebook PC Pentium with D	SR-ID-125488		1.0000	Pleasanton	
<input type="checkbox"/> INS0000014	ITN Notebook PC Pentium with D	SR-ID-125489		1.0000	Pleasanton	
<input type="checkbox"/> INS0000015	ITN Notebook PC Pentium with D	SR-ID-125490		1.0000	San Jose	
<input type="button" value="Add Installed Product"/>		<input type="button" value="Delete Selected Installed Product"/>				

Agreement Line - Installed Products page

Agreement

Scope Details

Line Defaults

Agreement Line

Billing

View Line Summary

Line Details

Entitlements

Installed Products

Sites

Price Information

Agreement Line Details

Find | View All

First

1 of 2

Last

Line 001

Status2-Active

+ -

*Start Date01/01/2001

*End Date12/31/2010

DescriptionRepair PC

ServiceRepair services for PCs

Line Entitlements

Customize | Find

First

1-5 of 5

Last

*Description	Type	Minutes	Service Level	Coverage	Percent Covered	Duration	Uplift or Discount		
Five hour guaranteed r	Response	300					10	+	-
Eight hour guaranteed	Restore	480					10	+	-
Extended Service Level	Svc Level		Extended				5	+	-
Extended Expense Cov	Coverage			Expenses	50	1 Year	5	+	-
Extended Material Cov	Coverage			Material	50	1 Year	5	+	-

Holiday Schedule

Agreement Line - Entitlements page

Agreement

Scope Details

Line Defaults

Agreement Line

Billing

View Line Summary

Line Details

Entitlements

Installed Products

Sites

Price Information

Agreement Line Details

Find | View All

First

1 of 2

Last

Line 001

Status2-Active

+ -

*Start Date01/01/2001

*End Date12/31/2010

DescriptionRepair PC

ServiceRepair services for PCs

Valid Sites

Customize | Find

First

1-3 of 3

Last

Select Line Site	Site ID	Description		
Site	587	Mountain View	+	-
Site	588	Pleasanton	+	-
Site	589	San Jose	+	-

Agreement Line - Sites page

The screenshot shows the 'Agreement Line - Price Information' page. At the top, there are tabs for 'Agreement', 'Scope Details', 'Line Defaults', 'Agreement Line', and 'Billing'. Below these are links: 'View Line Summary', 'Line Details', 'Entitlements', 'Installed Products', 'Sites', and 'Price Information'. The main section is titled 'Agreement Line Details' and shows 'Line 001' with a status of '2-Active'. It includes fields for '*Start Date' (01/01/2001) and '*End Date' (12/31/2010). The 'Description' is 'Repair PC' and the 'Service' is 'Repair services for PCs'. Below this is a 'Service Pricing' section. The 'Products' section shows a table with columns: Product ID, Description, Purchase Option, Prepaid Quantity, Prepaid Rate, Prepaid Unit, Base Line Price, and Base Line Price Unit. The table contains one row for 'SR1025' (ITN Notebook PC Pentium with D) with a 'Prepaid' option, a quantity of 5, a rate of 65.0000, and a unit price of 325.00. Below the table is a 'Calculate Final Line Price' section with fields for 'Base Price' (325.00 USD), 'Entitlement Adjustment' (35.00 %), 'Subtotal' (438.75 USD), and 'Adjustment (Percentage)' and 'Adjustment (Amount)' fields. The 'Final Line Price' is calculated as 438.75 USD. A 'Calculate Final Price' button is at the bottom.

Agreement Line - Price Information page

Note. If you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement, the system does not display the Sites and Price Information sub pages and links. If you selected *External - No Pricing* as the agreement category, the system does not display the Price Information sub page.

Agreement Line: View Line Summary

If an agreement has multiple agreement lines, they are listed in the Agreement Lines summary grid (available when you click the View Line Summary link) with basic information such as agreement line and service descriptions, product name, and product ID number. Click the agreement line number link to access the Agreement Line Details group box, where you can edit and view the corresponding line in detail.

If there is only one line in the agreement, the CRM system displays the Agreement Line Details group box together with pricing, site, entitlements, and product information.

When you click the Line Details link at the top of the page, the CRM system displays information for the selected agreement line in group boxes such as Retrieve Base Line Price, Calculate Final Line Price, Entitlements and so on. To minimize the need for scrolling, you can click the Sites, Entitlements, Installed Products, or Price Information links to view corresponding information selectively.

Agreement Line: Line Details - Agreement Line Details

Use this group box to add new lines to the agreement. Enter the status, start and end dates, description and service for the agreement service line. Click the Billing Information link to set up the billing schedule, purchase order, and payment terms information for the agreement line.

The Billing Information link only appears when the customer is integrating with the Contracts module in PeopleSoft Financials.

Note. For internal agreements (IT Help Desk and HR Help Desk), the Person Type and Worker Status fields also appear in this section.

Agreement Line: Line Details - Service Pricing

Use this group box to enter purchase option and transactional information for the agreement line service. Click the Price Definitions link to access the Service Pricing page.

Agreement Line: Line Details - Products

Use this section to define the products, purchase options, and prepaid quantity (if there is one). The system displays the prepaid rate, base line price, and base line price unit if it is stored in the system.

To view the transaction price for the product, click the Transaction Price tab. This section displays the transaction price on the corresponding agreement service pricing record. The price is based on the service or service-product combination that is defined for the agreement line.

The CRM system matches the value for the service and product fields on the agreement line with a unique pricing record that contains the same service and product values. In addition, this pricing record must contain the appropriate currency code for the agreement line. Never define more than one agreement service pricing record in the Pricing Information page for the same combination of service, product, and currency code, because this implies multiple prices for a single transaction.

You may associate a support-oriented agreement line with multiple products unless you have an integration to PeopleSoft Contracts. In this case you can only have one product per support-oriented agreement line (an agreement line with no Service). If you are not using the Contracts Integration feature, the save-edit check is disabled and you can enter multiple rows of data in the Product grid for the agreement line.

After defining the product and purchase option (prepaid options, if applicable), the other price related fields on this grid are populated when the user clicks the Calculate Final Price button.

When you perform an entitlement search from a case or a service order, the CRM system displays the transaction price or the remaining quantity that is 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 percent coverage of time, material, and expenses. Also, many of the fields related to pricing do not appear if you selected *External - No Pricing* as the agreement category.

Purchase Option

Displays the method of purchasing the service or support offering for an agreement or agreement service transaction.

Prepaid Rate, Prepaid Unit, Baseline Price and Baseline Price Unit	<p>Displays the amount paid per unit of work or per unit of time, depending on the purchase option of the agreement.</p> <p>Rates that are retrieved from an agreement service pricing record with a flat purchase option can be by the hour, case, or service order. Rates that are 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.</p>
Transaction Purchase Option, Transaction Price Unit, Transaction Price, and Currency Code	<p>Displays the transaction purchase option, the price per unit, the total transaction price and the currency.</p> <p>The currency that is displayed for the rate reflects the currency that is entered on the Billing page of this component.</p>
Remaining Quantity	<p>Displays the amount of the prepaid quantity that has not been used. For field service agreements, the prepaid quantity is in units of service orders or hours.</p> <p>For example, the CRM system reduces this quantity each time a user saves a new service order that is covered by the agreement line. If the service order is canceled, the CRM system readjusts the remaining quantity accordingly.</p> <p>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.</p>

Agreement Line: Line Details - Valid Sites

Use this section to add any valid sites to the agreement line. The system displays the site ID and description.

Note. Every line of a site-based agreement must be linked to at least one site.

Agreement Line : Line Details - Products Under Service

Use this section to add or delete any installed products that are covered by the agreement line. The system displays the description, serial number, asset tag (if there is one), quantity, and site where the product is installed.

Use the Add Installed Product and Delete Installed Selected Product buttons to make changes to the products listed under this group box.

Agreement Line: Line Details - Entitlements

This section lists the entitlements that are contractually owed to the customer for an agreement line. These are initially populated by using the set of entitlements that are defined on the Default Entitlements page of this component. You can add or delete entitlements in the grid by adding and deleting rows.

The system also displays the Holiday Schedule field after the entitlements. It appears by default from the Service Level page. You can override it or clear it. For Platinum customers, you may want inactivate the holiday schedule by clearing the field. If you enter a holiday schedule without a service level, the system treats it as a 7 x 24 entitlement with holiday schedule.

Entitlements Apply To

The system displays a group of fields based on the options you selected on the Agreement Search Configuration page for the business unit you are using.

Use the fields that appear in this group box to link the response and restore times to the different values for the various fields that appear.

For example, if you selected the *Match Using Case Criteria* option and selected *Role*, *Department*, *Priority*, *Source*, and *Location* as categories that you wanted the system to use when searching for agreements, the system would display all of the fields on this page.

If you do set values for the fields appearing in this group box, the system uses them to search for agreements when a user selects the Select Agreement link from the Case page.

For example, if you set the Priority field to *Low* on this page, the system would locate this agreement line and use the response and restore times that you set up on the agreement line for all low priority cases that meet the other criteria of the agreement line.

For all low priority cases that fulfill the other matching considerations for a valid agreement line for all low priority cases, the system uses other standard fields that are considered for an agreement match, such as start and end date, status, product, installed product, asset, and so on. The system is not using the other criteria in the Entitlements Apply To section.

Agreement Line: Line Details - Calculate Final Line Price

This section displays the variables that the CRM system used to calculate the final line price for the agreement line.

Note. This section does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement. If you selected *External - No Pricing* as the agreement category, the system does not display this section either.

Base Price	Displays the base price for the service or service product combinations of the agreement line.
	<hr/> Note. For agreement lines with a prepaid purchase option, this value is informational only. The prepaid rate, not the base price, is used to calculate the final line price. <hr/>
Entitlement Adjustment	Displays the sum of the uplift and discount percentage values that are associated with the entitlements on this agreement line after clicking the Calculate Final Price button.
Subtotal	Displays the subtotal for the agreement line after the base price has been adjusted by the entitlement uplift or discount.
Adjustment (Percentage)	Select the positive (+) or the negative (–) sign from the drop-down list box and then enter a percentage by which you want to adjust the price of the agreement line.

Adjustment (Amount)	Select the positive (+) or the negative (–) sign from the drop-down list box and then enter an amount by which you want to adjust the price of the agreement line.
Reason	Select the reason that you are making the adjustment. If the reason is not listed in the drop-down list box, click the Other link and enter the reason you are making the adjustment.
Final Line Price	Displays the final price for the agreement line. Sum of the Prepaid Quantity \times Prepaid Rate
Calculate Final Price	Click this button to calculate the final price for the agreement line. The system retrieves all appropriate service or service/product prices, calculates subtotals and adds and subtracts any discounts or adjustments that you have made to the base price.

Agreement Line: Installed Products

The section lists all of the installed products covered by that agreement line. If the agreement covering the service order has a scope of *Site*, the installed products are limited to those that match the sites that are covered by the agreement line.

The CRM system displays the Products Under Service grid if you choose to view line details or just the installed product information of the agreement line.

It lists the customer's installed products that are eligible for the service or support specified on the agreement line. Installed product information must be added manually to the agreement.

When installed products are added to an agreement line, the CRM system automatically updates them on the agreement line whenever replacements are made at the customer's site (when material is recorded in the Service Order on the Time Material Expense page).

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 *Contact*, the installed product choices are limited to those that match the product and customer specified. You can never select installed products with a status of *Uninstalled*.

Agreement Line: Entitlements

This section lists the entitlements that are contractually owed to the customer for an agreement line, including the holiday schedule. These are initially populated by using the set of entitlements that are defined on the Default Entitlements page of this component.

Agreement Line: Sites

The section lists all of the sites associated with the agreement line: the allowable values are determined by the sites that were entered on the Scope Details page. You can add or delete sites displayed in the grid by adding and deleting rows.

Note. This section does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

Agreement Line: Price Information

Use this group box to enter purchase option and transactional information for the agreement line. Click the Price Definitions link to access the Service Pricing page.

For more information and field descriptions, refer to the Line Details - Products section for the Agreement Line Tab.

Note. This section does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement. If you selected *External - No Pricing* as the agreement category, the system does not display this section either.

See Also

[Chapter 25, "Setting Up and Managing Agreements and Warranties," Specifying Line Defaults, page 497](#)

[Chapter 27, "Performing Entitlement Searches for Cases and Service Orders," page 531](#)

[Chapter 25, "Setting Up and Managing Agreements and Warranties," Specifying Line Defaults, page 497](#)

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Setting Up Services"

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Ordering and Receiving Materials"

Defining Billing Information

Access the Billing page (Customer Contracts CRM, Agreements, Agreements, Billing).

Note. This page does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement. If you selected *External - No Pricing* as the agreement category, the system does not display this page either.

Agreement

Save | Search | Add Agreement | Next | Previous | 360 360-Degree View | >> | Personalize

Agreement Code	AGR-315-COM	SetID	CRM02
Customer	<a>Global Payment Network	Customer Value	Gold ★★★★★
Contact		Status	Active
Category	External	Scope	Site

Agreement | Scope Details | Line Defaults | Agreement Line | Billing

Customer Information

Bill To Customer:

Bill To Contact:

Bill To Address:

Currency Code: US Dollar

Payment Information

PO Number:

☒ Invoice Payment Terms:

☐ Credit Card

Tax Parameters

Billing Details page (1 of 2)

Billing Information

Expand All | Collapse All

Line	Service	Product	Price	+/-	Adjustment	Type	Reason	Extended Price
<a>001	PC Repair Svc.	ITN Notebook PC Pentium with D	438.75	-	<input type="text"/>	Amount	<input type="text"/>	<a>Other 438.75
<a>002	Printer repair		337.50	-	<input type="text"/>	Amount	<input type="text"/>	<a>Other 337.50
Subtotal								776.25
				Additional Adjustment	-	<input type="text" value="10.00"/>	Percent	<input type="text"/>
								<a>Other -77.62
Total								698.63 USD

Recalculate Totals | Clear Adjustments

Audit History

Billing Details page (2 of 2)

Customer Information

These fields capture information to determine how much to charge the customer for the agreement and the method of remittance that the customer uses.

Bill to Customer

Select the customer that should be billed for the service. The primary customer appears by default in this field.

Bill To Contact

Select the contact that should be billed for the service. The primary contact appears by default in this field.

Bill To Address	Select the bill to customer address to which the bill should be sent. The primary bill to address appears by default in this field.
Currency Code	Select the currency that the customer is using for the transaction. The currency name appears to the right of the field. When the information is sent to PeopleSoft Contracts, the system prints the name of the currency on the invoice. The base currency of the sold to customer appears by default in this field.

Payment Information

Purchase Order	Enter the customer-provided purchase order number. <hr/> Note. This field does not have any integration to PeopleSoft Supply Chain Management (PeopleSoft SCM) and is not required. If you enter a purchase order number in this field, the system posts it to PeopleSoft Contracts. When PeopleSoft Contracts sends the information to PeopleSoft Billing for invoice generation, the system prints the purchase order number on the invoice. <hr/>
Invoice	Select if the customer intends to pay for the service by invoice.
Payment Terms	If you selected the Invoice option, use this field to select the payment terms for the invoice (for example, <i>NET30 - Due in 30 days</i>). The payment terms appear on the invoice that is sent to the customer.
Credit Card	Select if the customer intends to pay for the service by credit card. The system displays the Credit Card Information link after you select this option.

Credit Card Information

Click to access the Credit Card Details page, where you enter credit card authorization information, such as the card type, card number, expiration month and year, and card verification number.

Note. The system deletes the card verification number after the credit card authorization process is completed.

The system populates the name of the cardholder, email address and phone number of the bill to contact (selected on the Billing page). It also populates the bill to address as the default address for the new credit card. You can enter a new address, or click the Edit link to update the selected address in the corresponding Person record.

The system displays the authorization status, date, and code on the Transactions Results page after you click the Submit Transaction button on the Credit Card Details page.

Note. You can integrate credit card information with Cybersource, a third-party card vendor.

The Credit Card Details page is also used in the Case component to submit customers' credit card information for authorization purposes.

See *PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook*, "Managing Credit Card Payments," Submitting Credit Card Information for Authorization.

Tax Parameters

Click this link to access the Tax Parameters page. Use this page to indicate whether the customer is exempt from taxes. If the customer is tax exempt, enter the exemption certificate number and tax code that the customer supplies to you.

The system uses a default tax code based on the customer's address; however, you can override it by choosing another value.

Schedule

Select the schedule to indicate the way in which the revenue needs to be recognized in the general ledger. The system synchronizes this information from the general ledger.

Billing Information

Managers can use this section to adjust the fees by increasing or decreasing a fee by a percent or by an amount.

The system does not use the new price in the totals until a user clicks the Recalculate Totals button. The system then calculates the sum of all active or closed lines, including those that have changed, and provides the recalculated amount in the Total Amount field.



Click the Expanded button to the left of the Line column to view all billable amounts that were included in the price for a given fee.

+/-

Select the positive (+) or the negative (–) sign from the drop-down list box and then enter the number by which you want to adjust the price of the agreement line.

Adjustment	Enter the number, either a percentage or an amount, by which you want to make an adjustment.
Type	Select <i>Percent</i> or <i>Amount</i> .
Reason	<p>Select the reason for the adjustment. These values are user-definable. You define reason codes on the Reason Code page (select Set Up CRM, Common Definitions, Codes and Autonumbering, Reason Codes). Use <i>Agreement Billing Adjustment</i>, <i>Case Billing Adjustment</i> or <i>Svc Order Billing Adjustment</i> as the reason type when you set up your reason codes.</p> <p>See <i>PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook</i>, "Setting Up Call Center Prompt Tables," Setting Up Reason Codes.</p>
Other	If the predefined values for the Reason field do not describe the reason for the adjustment, click this link to access the Other Reason page where you can enter a unique description of the reason.
Extended Price	This value is calculated when you click the Recalculate Totals button. The system sums the total of the price, plus or minus any adjustments.
Recalculate Totals	Click this button any time there is a change to the Billing Details grid that impacts the price or the currency code. The system recalculates the total cost of the fees.
Clear Adjustments	Click this button to clear the adjustments that were made and return to the original total amounts.

Defining Warranties

This section provides an overview of warranty definitions and discusses how to define warranties.

Understanding Warranty Definition

Use the Warranty component to define the duration and entitlements that are associated with a warranty. Defined warranties are associated with items on the Item Definition page.

If a product references an item in its product definition and this item is associated with a warranty, any installed product that is subsequently created for this product then contains the warranty information of its own item. You can manually update or delete the associated warranty for an individual installed product.

For items that are installed at a customer's site, you can activate the warranty on a customer's installed product by using the Installed Product component. When searching for entitlements for a product on a case or service order, the CRM system checks the response time, so a warranty match may appear before or after an agreement on the results page.

See Also

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Defining Items"

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Defining Items"

Chapter 27, "Performing Entitlement Searches for Cases and Service Orders," page 531

Page Used to Define Warranties

Page Name	Definition Name	Navigation	Usage
Warranty	RF_WARRANTY	Customer Contracts CRM, Agreements, Warranties, Warranty	Define product warranties.

Defining Warranties

Access the Warranty page (Customer Contracts CRM, Agreements, Warranties, Warranty).

Warranty

Warranty Name EXTENDED-COM SetID CRM02

Warranty Details

*Description Extended warranty for Commercial customers
Provider Manufacturer

Critical Times

Warranty Length 12 Days for Refund 30
Unit Month Days to Return 45
Starts Install Days For Replacement 60

☐ RMA Required ☐ Walk-in Allowed
☐ Warranty Transferable ☐ On-Site Repair
☐ Invoice Required ☐ Shipment Allowed
☐ Loaner Provided

Entitlement Plan Name GOLD

Warranty page (1 of 2)

Line Entitlements							
Entitlements Customize Find First 1-2 of 2 Last							
*Description	Entitlement Minutes	Service Level	Coverage Type	Percent Covered	Duration	Uplift / Discount	
Extended Expense Coverage			Expenses	50	1 Year	5	
Extended Material Coverage			Material	50	1 Year	5	

Holiday Schedule

Audit History

Warranty page (2 of 2)

Warranty Details

Provider Select the organization that absorbs the cost of the services that are covered by the warranty. Options include: *Manufacturer*, *Retailer*, or *Service Organization*.

Critical Times

This section details the periods of coverage for the warranty. If an installed product is under warranty, its default start date is determined by the ship date, installation date, or order date of the installed product, as applicable. The CRM system calculates the end date by adding the warranty length to the start date.

Warranty Length Enter a number value to represent the length of the warranty.

Unit Select the time unit of measure for the warranty period. The values are: *Day*, *Month*, *Week*, or *Year*.

Starts Select when warranty coverage begins.

Install: Coverage begins the date when the item is installed at the customer site.

Order: Coverage begins the date when the item is ordered.

Ship: Coverage begins the date when the item is shipped to the customer.

Days for Refund, Days to Return, and Days For Replacement Enter 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, return the item to receive credit for the price of the item, or return the item in exchange for a replacement item.

Use the check boxes in the center of the page to indicate, for informational purposes, how warranty services are provided.

RMA Required (return material authorization required) Select if installed products under warranty must be returned for warranty services by using RMA processing.

Walk-in Allowed	Select if the customer can bring installed products under warranty to your repair center.
Warranty Transferable	Select to keep the warranty in effect for the new owner if ownership of the installed product changes.
On-Site Repair	Select if installed products under warranty can be serviced at the customer's site.
Invoice Required	Select if the customer must provide a copy of the invoice for an installed product under warranty before warranty services can be performed.
Shipment Allowed	Select if the customer can ship installed products under warranty to your repair center.
Loaner Provided	Select if the customer will be loaned a similar item while the installed product under warranty is being repaired.
Entitlement Plan Name	Select a default entitlement plan from the Entitlement Plan Name field to initially populate the grid with a predefined set of entitlements.

Entitlements

Use this section to add or delete entitlements from this set as necessary. Entitlement plans are established on the Entitlement Plan Setup page. You can also manually enter all entitlement entries into the Entitlements grid without entering an entitlement plan name to pre-populate the grid.

If you do not provide warranty service on holidays, select the holiday schedule that applies to your company's hours of operation. The system uses this information to calculate start and end dates for service.

Warning! If you change the entitlements that are offered by an existing warranty, you also change the entitlements for any installed product that is covered by the warranty. When a warranty has been associated with an installed product, you should not modify 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.

The CRM system displays the information that is associated with set of entitlements as defined on the Entitlements page.

See Also

[Chapter 15, "Defining Holiday Schedules," page 247](#)

[Chapter 25, "Setting Up and Managing Agreements and Warranties," Understanding Agreements and Warranties, page 453](#)

[Chapter 25, "Setting Up and Managing Agreements and Warranties," Defining Entitlements, page 471](#)

[Chapter 25, "Setting Up and Managing Agreements and Warranties," Defining Entitlement Plans, page 474](#)

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Ordering and Receiving Materials," Managing Materials

Generating Sales Leads for Agreement Renewal

This section provides an overview of lead generation for agreement renewal and discusses how to set it up

Note. This feature is only available to customers that have licensed PeopleSoft Sales and PeopleSoft Integrated FieldService.

Understanding Lead Generation for Agreement Renewal

To help you sustain company revenue and be proactive about contract renewals for the established customer base, set up PeopleSoft CRM to retrieve agreements that are expired or about to expire and generate sales leads for them. Like other leads, the leads that are created for agreement renewal appear on the Search Leads page for the sales team with *Agreement* as the lead source.

Lead Generation for Expiring and Expired Agreements

PeopleSoft CRM uses an Application Engine (AE) program, which runs on a daily basis (recommended setting) to look for agreements that are about to expire or have recently expired (based on the number of lead days that are defined by the user) and create leads for them.

When the AE program runs, it searches for agreements that are associated with the sales business unit that is specified on the run control page. Because sales leads are keyed by business unit and agreements are keyed by setID, the CRM system performs a business unit-setID mapping exercise in the background to determine which setID corresponds to the selected sales business unit. All agreements in that setID are processed, and all leads that are subsequently created will belong to the specified sales business unit.

Note. Only agreements with the status of *Available* are selected by the AE program for evaluation. The AE program does not process agreement templates.

Among all available agreements in the given setID, the AE program generates sales leads for those whose expiration date falls between the start and end dates of a time period that is calculated by using the user-defined lead time. The start and end dates are calculated using this formula:

$(\text{Start Date}) = (\text{Current Date}) - (\text{Agreement Renewal Lead Time})$

$(\text{End Date}) = (\text{Current Date}) + (\text{Agreement Renewal Lead Time})$

For example, the AE program is scheduled to run today on October 15, and the lead time (in number of days) that is defined at the installation level is 7. For any agreement with an expiration date between October 8 through October 22, a sales lead is generated by the lead generation process.

When you look up a sales lead for agreement renewal from the Search Leads page, agreement-specific information, such as agreement code and renewal number, is available on the Source tab as a reference. You can also transfer to the read-only version of the agreement from the lead.

For agreement renewal purposes, an agreement can only be associated with one sales lead at a time. The agreement is not selected by the AE program if a sales lead was already generated for it. In addition, the CRM system does not generate sales leads for agreements that are already renewed.

Setting Up Lead Generation for Agreement Renewal

This section discusses how to:

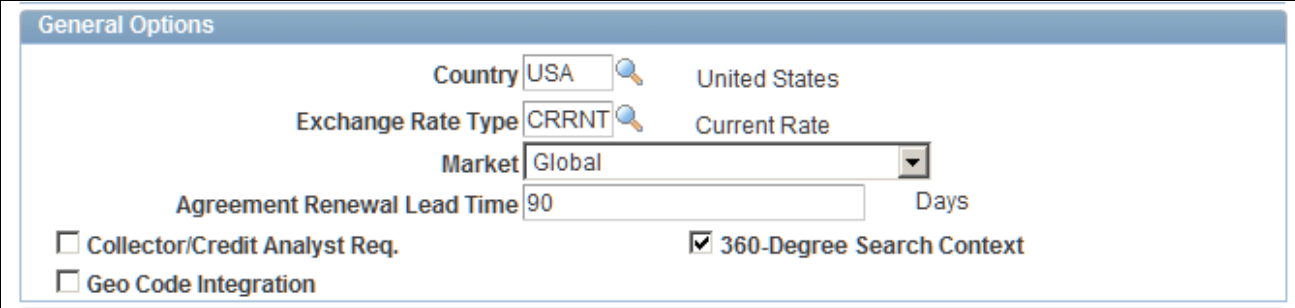
- Define lead time for generating leads.
- Generate leads for expiring agreements.
- Access leads that are generated for agreements.

Pages Used to Set Up Lead Generation for Agreement Renewal

Page Name	Definition Name	Navigation	Usage
General Options	RB_INSTALLATION	Set Up CRM, Install, Installation Options, General Options	Define how many days before or after an agreement expiration date that a sales lead should be generated.
Sales Lead Generation for Agreement Renewal	RUN_CNTL_RFLEAD	Customer Contracts CRM, Agreements, Lead Generation, Sales Lead Generation for Agreement Renewal	Start a batch process that runs on a daily basis (recommended) to generate sales leads for agreements that are about to expire or have recently expired.
Lead - Discover	RSF_LEAD_ENTRY	Sales, Search Leads, Discover	Access sales leads that are generated for agreements.

Defining Lead Time for Generating Leads

Access the General Options page (Set Up CRM, Install, Installation Options, General Options).



General Options page: General Options section

In the Agreement Renewal Lead Time field, enter the number of days before expiration that an agreement is eligible for the lead generation process. This is also the number of days after expiration that the agreement is still eligible for the process. By default, this value is set to 90 days.

See [Chapter 3, "Setting Up General Options," page 21](#).

Generating Leads for Expiring Agreements

Access the Sales Lead Generation for Agreement Renewal page (Customer Contracts CRM, Agreements, Lead Generation, Sales Lead Generation for Agreement Renewal).



Sales Lead Generation for Agreement Renewal

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

Language:

Run Control Criteria

*Unit APP0 

Sales Lead Generation for Agreement Renewal page

Select a sales business unit for which leads will be created for expiring agreements after the AE program (RF_AGR_LEAD) is run.

Note. The AE process should be run on a daily basis.

Accessing Leads That Are Generated for Agreements

Access the Lead - Discover page (Sales, Search Leads, Discover).

Lead

Save | Add Lead | Notification | Clone | Convert | >> Personalize

Description Renewal of agreement AGR_110 **Status** New
Customer MD Engineering **Contact** Bardini, Agnes
Contact Phone 907/558-6987 **Rating**

Summary Discover Assign Qualify Propose Call Reports Tasks Notes History

Customer

Customer MD Engineering [Search Again](#)

Address 3440 Indian Trail, Fairbanks, AK, 99701, USA [Search](#) [Advanced Search](#)

Site

Address

Partner

Partner **Contact**

[Search](#) [Advanced Search](#)

Lead - Discover page (1 of 2)

Lead

*Description Renewal of agreement AGR_110 *Business Unit US300
Sales Rep Sandy Ralphs **Revenue** **Currency** USD
***Status** New **Rating** **Priority** 5

Contacts [Customize](#) | [Find](#) | [First](#) | [1 of 1](#) | [Last](#)

[Contact](#) | [Phones](#) | [Impact](#) | [Organizational](#) | [Correspondence](#)

Primary	First Name	Last Name	*Pref Comm	Work Phone	Ext	Email Address
<input checked="" type="checkbox"/>	Agnes	Bardini	Call	907/558-6987	3568	crm_customer_07@ap6

First Name **Last Name** [Add](#)

Accept/Reject Lead

[Accept](#) [Reject](#) [Turnback](#)

Related Transactions

[Assign Team](#) | [Add Product](#) | [Create Quote](#) | [Add Note](#) | [Add Task](#)

Lead - Discover page (2 of 2)

Open a sales lead that is generated for agreement renewal purposes. You can click the Agreement link to access the agreement that needs to be renewed. The name of the agreement is listed is part of the lead name.

See Also

PeopleSoft Enterprise Sales 9.1 PeopleBook, "Creating Sales Leads and Opportunities"

Chapter 26

Defining Pricing Information for Services and Support Offerings

This chapter provides an overview of pricing records and discusses how to establish pricing records.

Establishing Pricing Records

This section provides an overview on pricing records and discusses how to establish pricing records.

Understanding Pricing Records

This section discusses:

- Pricing records.
- Types of pricing records.
- Products, services, and service activities on pricing records.
- Pricing records for each currency.
- Purchase options.
- Pricing structures on agreements.

Pricing Records

You use the Pricing Information component in PeopleSoft CRM to define pricing records for service and support offerings. The system uses the pricing structure that you define to calculate prices on agreements.

When you are creating service orders and cases, you can use the Pricing Information component to look up the price for work not covered by an agreement, such as on-demand service or support calls, or an additional service activity that is not included in the service on the customer's agreement. The system, however, automatically populates the price defined on the Pricing page for the transaction.

Note. With the pricing records that you define in the Pricing Information component, PeopleSoft CRM can calculate agreement prices. It can also price on-demand transactions for cases and service orders as well as service fees.

Types of Pricing Records

You can define pricing records for these types of transactions:

- Agreements
- Agreement services
- Agreement cases
- On-demand services
- On demand cases

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 when the agreement is issued to or signed by the customer. In addition, PeopleSoft CRM supports the ability to pay for the agreement on a recurring basis.

Agreement service or case pricing records define what the customer pays when the work that is 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 or support offerings 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, agreement cases, on demand case 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 and are identified as an agreement case or an on-demand case. Field service organizations define pricing records for a service or for a combination of a service and a product and are identified as agreement service or on-demand service.

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 that is defined for the service alone. For support-based agreements, the agreement price is based on prices defined for products only.

You can also define rates for service activities and combinations of products and service activities. These pricing records enable you to adjust a customer's invoice when he or she requests additional service activities that are not included in the service.

For example, at the time that a customer requests a service that is covered by an agreement, you might want to offer the ability to upgrade the service by adding additional service activities to the basic service that is covered by the agreement. You can define a fee for each service activity that the customer adds to the basic service. Note that you can define a pricing record 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, agreement case, on demand case 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

You can define prices for these types of purchase options:

- Flat
- Prepaid
- 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, on-demand service, agreement case, or on-demand case, 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 that is 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. If the prepaid quantity is in units of hours, the system decreases this quantity each time a technician or agent reports time that is spent (total hours) on a service order or case that is covered by the agreement line.

The time and material purchase option defines a rate for the labor time that is required to perform the requested work. This rate is always expressed as a time-based unit of measure and applies only to agreement and on-demand service and case pricing records. Material is not directly accounted for by the time and material purchase option. However, you can track material usage for service orders and manually account for the material when creating the customer's invoice.

This 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.

<i>Applies To</i>	<i>Purchase Option</i>	<i>Unit</i>	<i>Prepaid Quantity</i>	<i>Example</i>
Agreement	Prepaid	Case, service order, or hour.	Required	30 USD per service order for a prepaid quantity of 15.
Agreement service/case	Time and material	Time-based (hour, day, week, month, year).	Not allowed	40 USD per hour.
Agreement service/case	Flat	Case or service order.	Not allowed	45 USD per service order/case.
On-demand service/case	Flat	Case or Service order.	Not allowed	55 USD per service order/case.
On-demand service/case	Time and material	Time-based (hour, day, week, month, year). For cases it's only hour.	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 preventive maintenance (PM) service agreement for air conditioners. For an agreement price of 500 USD, a service technician will perform preventive maintenance 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 preventive maintenance 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 preventive maintenance service for five years. If the customer's air conditioner requires 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), you can 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 unlimited PM service. For a five-year agreement, this would cost 500 USD for unlimited PM service.

See Also

Chapter 25, "Setting Up and Managing Agreements and Warranties," page 453

Page Used to Establish Pricing Records

Page Name	Definition Name	Navigation	Usage
Service Pricing	RF_SVC_PRICE	Pricing Configuration, Service Pricing, Service Pricing	Establish pricing records for service and support offerings.

Establishing Pricing Records

To establish pricing records, use the Service Pricing (RF_SVC_PRICE) component.

Access the Service Pricing page (Pricing Configuration, Service Pricing, Service Pricing).

Service Pricing

Enter or select the criteria you want to appear in the list of Prices and press Search.

SetID CRM01

Service PM for A/C

Purchase Option

Applies To

Activity

Product ID

Currency Code

Search

Clear

View and update Prices in the list below.

Prices

Customize | Find | View All | 1-3 of 3 | First | Last

Applies To Information

Rate Information

*Applies To	*Purchase Option	Service	Product ID	Description	Activity Code		
Agreement	Flat	PM for A/C				+	-
Agreement	Flat	PM for A/C	SR1001	6600 BTU Room Air (Light Beige)		+	-
Agreement	Flat	PM for A/C	SR1002	6000 BTU Room Air (Grey)		+	-

Pricing Information page

Note. To establish pricing for products that you sell, use the Price page under Products CRM. Also, material costs for items are stored in the inventory system.

Search Filter

Select pricing information that meets a specific set of criteria. Enter the criteria and click the Search button. If you click the Search button without specifying any criteria, the system returns all pricing records that are defined for the setID.

Service	Select a service to limit the search to pricing records that are defined for a specific service. You define services by using the Services component. Click the Transfer to Service button to access the Services component. Services are not relevant to pricing for support agreements.
Activity	Select a value to limit the search to pricing information that is defined for a specific service activity. You use the Service Activity Code page to define activities. Click the Transfer to Activity button to access the Service Activity Code page.
<hr/> Note. Search criteria can include a service or an activity, but not both. These fields are mutually exclusive on the pricing record. <hr/>	
Purchase Option	Select a value to limit the search to pricing records for the specific purchase option: <i>Flat</i> , <i>Prepaid</i> , or <i>T&M</i> (time and material).
Product ID	Select a value to limit the search to pricing records for specific product. You establish products in PeopleSoft CRM by using the Product EIP or the Product Definition component.
Applies To	Select a value to limit the search to pricing records for the specific applies to option: <i>Agreement</i> , <i>Agreement Case</i> , <i>Agreement Service</i> , <i>On Demand Case</i> , or <i>On Demand Service</i> .
Currency Code	Select a value to limit the search to pricing records for a specific currency. You establish currencies on the Currency Code page.

Prices

The system displays the pricing information records that meet the search criteria.

Applies to Information

Applies To	Select the transaction that the pricing record applies to: <i>Agreement</i> , <i>Agreement Case</i> , <i>Agreement Service</i> , <i>On Demand Case</i> , or <i>On Demand Service</i> .
Purchase Option	<p>Select the purchase method for the service or support offering: <i>Flat</i>, <i>Prepaid</i>, or <i>T&M</i> (time and material).</p> <p>The <i>Prepaid</i> option applies only to pricing records for agreement transactions.</p> <p>The <i>T&M</i> option applies only to pricing records for agreement service, agreement case, on demand case and on demand service transactions.</p>

Service Select the service that the pricing applies to, if applicable. You use the Services component to define services. Click the Transfer to Service button to access the Services component. Services are not relevant to pricing for support agreements.

Product ID Select the product that the pricing record applies to, if applicable. Click the Transfer to Product button to access the Products component.

If you specify both a product and a service on a pricing record, the price applies only to that particular service-product combination. Pricing records that only specify products are used only by call centers to define rates for supporting specific products.

Activity Code Select the service activity that the purchase option applies to. You can define pricing records for service activities or combinations of service activities and products. You can define a pricing record for a service or an activity, but not both.

You can use service activity price information to adjust a customer's invoice when activities are added to a service that is covered by an agreement. The system displays the information on the Billing page for the service order or case.

Rate Information

Currency Code Select the currency of the rate amount. You must define a complete set of pricing records for service and support offerings for each currency that you use.

Rate Amount Enter the amount that is charged per the specified unit in the specified currency.

Unit Select the unit of work that is associated with the rate amount. Depending on your Applies To and Purchase Option field selections, you can specify a rate for the following work units: *Day, Hour, Month, S.O. (service order), Case, Week, or Year.*

Prepaid Quantity Enter the number of work units of a service or support offering that a customer pays for in advance. This value applies only to the *Prepaid* purchase option.

See Also

[Chapter 26, "Defining Pricing Information for Services and Support Offerings," Understanding Pricing Records, page 523](#)

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Setting Up Products"

[Chapter 25, "Setting Up and Managing Agreements and Warranties," page 453](#)

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Setting Up Services"

PeopleSoft Inventory PeopleBook

Chapter 27

Performing Entitlement Searches for Cases and Service Orders

This chapter provides an overview of entitlement searches and discusses how to perform searches.

Understanding Entitlement Searches

This section discusses:

- Entitlement searches.
- Minimum information that is required to perform entitlement searches.
- Warranty matches.
- Agreement matches.
- Service level suspensions for PeopleSoft HelpDesk.
- Delay Notifications.
- Workflow.

Entitlement Searches

Entitlements define what a customer is contractually owed for the service or support offering on an agreement line or warranty. When you perform an entitlement search on the Service Order page or Case page, the system searches for valid agreement lines or warranties that cover the work on the service order or case and displays the associated entitlements.

The system uses the values that you entered in the fields for product ID, serial number, service, and either site or site identification number (SIN) to search for agreement line and warranty matches for service orders. For cases, the system uses the same fields (with the exception of service) as well as those for contact or personal identification number (PIN).

For support cases, the system passes customer, contact, product ID, serial number, case ID, PIN, SIN, and site as the search criteria for entitlement searches.

For help desk cases, the system passes employee, case ID, product, asset tag, priority, source, department, location, employee role (defined as manager level in the Worker component), and person type (employee, contingent worker, or person of interest) to the search. Additionally, for employees and contingent workers, the employee status is passed to the search.

Note. If the internal agreement search option is set to *Match Using Case Criteria*, the system additionally passes priority, source, department, location and employee role information to PeopleSoft HelpDesk searches, depending on the values that are set on the Agreement Search Configuration page. Likewise, if the external case agreement search option is set to *Match Using Case Criteria*, the system additionally passes case category, priority, source, type, and customer value information to PeopleSoft Support entitlement searches, depending on the values that are set on the Agreement Search Configuration page.

If the system renders more than one warranty or agreement line that match the available search criteria, you can select the appropriate one from the entitlement match list that is generated by the system. When you make a selection, or if the CRM system finds only one match, the entitlement information of the selected agreement line or warranty is automatically populated to the service order or case. You can view the entitlement details directly on the service order or case.

Minimum Information That Is Required to Perform Entitlement Searches

Before you perform an entitlement search, you must provide a customer or employee that is associated with a case or service order. Additionally, the case search uses the case ID plus one of the following: contact, PIN, site, or SIN. The product ID and serial number or asset tag number are optional but are recommended because they focus the search to a much greater degree.

For entitlement searches on service orders, you need to provide a site ID or SIN in addition to the customer. You can further limit the search by entering a product ID (or the installed product ID, which is identified by the serial ID on the service order), or a service.

When entering information on the case or service order, the system uses the product ID that you enter to select the appropriate installed product records for the customer. If you do not enter enough information to uniquely identify an installed product, all the matching entitlements are returned.

Warranty Matches

If you enter an installed product on the service order or support case, the system checks for a valid warranty that applies to the installed product. The system identifies the installed product by using the serial number that appears on the case or service order.

When an installed product is specified on the service order or support case, the system checks for the following conditions:

- The installed product is associated with a warranty.
- 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. The system does not return, and you cannot select, warranties from searches for a PeopleSoft HelpDesk case.

Agreement Matches

The CRM system searches for agreement line matches in addition to any warranty matches that are found. For an agreement line to be considered for the entitlement search, the current date must fall on or between the start and end dates on the agreement line, the agreement line must have a status of *Active*, and the agreement itself must have a status of *Active*.

The customer who is listed on the service order or support case must match the customer who is identified on the agreement.

The internal PeopleSoft HelpDesk agreement always applies to all employees, except when the user has selected *Match Using Case Criteria* on the Agreement Search Configuration page for internal agreements and has applied the various rules to individual agreement lines to limit the applicability of those lines to certain groups of employees based on role or department. The administrative contact on the header page for the internal agreement is NOT the worker for whom the agreement applies.

If a SIN is entered, the CRM system returns all agreement lines whose site matches the site linked to that SIN on agreements with a scope of *Site*. If a site ID but not a SIN is provided, the system returns all agreement lines that match the site ID.

Note. On a case in which a site ID was previously selected, the CRM system limits the selection of installed products to those that are specified for that site. On a service order in which a site ID was previously selected, the system limits the selection of products and installed products to those that are available to the selected site only.

If you enter a PIN, the system returns all agreement lines whose contact (named caller) matches the PIN on agreements with a scope of *Contact*. If a contact but not a PIN is provided, the system returns all agreement lines where the contact is listed as the named caller.

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 the contact's person ID is not matched against PIN entries in agreements.

If an installed product is identified on the case or service order, the system returns all agreement lines that list the installed product as a product under service. Agreement lines that cover the corresponding product ID and do not list individual installed products (for example, agreement lines that provide blanket coverage) are also returned.

Note. The Agreement Search Configuration page enables you to choose the rules on how you want the system to return lines for agreement searches. For PeopleSoft Support, Integrated FieldService, and HelpDesk you can enable the system to search for agreements based on the shortest or longest response times; or let the user select from all matches. Additionally, for PeopleSoft HelpDesk and Support, you can set up specific rules by which the system will search for agreements by matching on additional criteria.

Service Level Suspensions for PeopleSoft HelpDesk

When a service level agreement (SLA) cannot be met for justifiable reasons, an agent using PeopleSoft HelpDesk can change a case to the *On Hold* status. In this situation the system sends a suspension notification to the agent's manager. This also applies to PeopleSoft Support.

The system stops the clock for the service agreement and clears the response and restore dates and times. When the case is activated again, the agent or manager changes the case status back to *Open*. When this happens the clock resumes from where it left off and the response and restore dates and times are recalculated to reflect the on hold period.

To facilitate these processes, PeopleSoft delivers these notifications and workflow exceptions:

Delay Notifications

When the agreement is applied, the system sends out a delayed notification to remind the agent, provider group, or call center manager of a potential SLA delay. PeopleSoft delivers these notifications as sample data:

- **Response**
 - Based on delayed percentage configured through AAF, the system sends a notification to the agent regarding initial response if it's not met yet. If no agent is assigned to the case, the system sends notification to the provider group. If no provider group is defined on case either, the system send notification to the call center manager.
 - When the delay reaches 100 percent of the response time, the system sends a notification to the agent and manager regarding the response exception and sets the service agreement response met flag to *No*.
- **Restore**
 - Based on delayed percentage configured through AAF, the system sends a notification to the agent warning of potential service agreement exceptions (the same change as response.)
 - When the delay reaches 100 percent of the restore time, the system sends a notification to the agent and manager regarding the restore exception and sets the service agreement restore met flag to *No*.

Workflow

This is general workflow delivered for SLA, not workflow exceptions. The CRM system delivers these workflows as system data:

- **SLA Start**

When a case is associated with a service agreement or warranty, the system triggers an SLA start event to create an event history entry with an agreement code or warranty name.
- **Delayed Notification**

When service starts, the system schedules delayed notifications. The system sends an initial notification to the agent, provider group, or call center manager regarding call back or warning of potential exceptions. When you first install your CRM application, PeopleSoft delivers 90% delayed notification. The system sends out a notification when the case is not responded to and is past 90% of the customer's entitled response. You can, however, percentage easily configure this percentage in AAF.
- **SLA Response Met**

When a case is responded to within the entitled response time, the system triggers an SLA Response Met event and creates an event history record.
- **SLA Restore Met**

When a case is closed within the entitled restore time, the system triggers an SLA Restore Met event and creates an event history record.
- **SLA Response Exception (Application Engine process)**

This workflow exception is scheduled as a delayed Application Engine process when service starts. When the service response is not met, the system wakes up the Application Engine program. The program calls the component interface (CI) to set the response met flag to *No*, and then triggers the SLA Response Exception workflow.
- **SLA Response Exception (workflow)**

When the response met flag is set to *No*, the system sends a notification to the agent and manager and inserts a record into event history.

- SLA Restore Exception (Application Engine process)

This workflow exception is scheduled as a delayed Application Engine process when service starts. When a case is still open at the time restore is reached, the system wakes up the Application Engine program. The program calls the CI to set the restore met flag to *No*, and then triggers the SLA Restore Exception workflow.

- SLA Restore Exception (workflow)

When the restore met flag is set to *No*, the system sends a notification to the agent and manager and inserts a record into event history.

- SLA Change

Users with the change privilege can open the case, clear the service agreement, change the search criteria (changing priority or source is mainly for PeopleSoft HelpDesk users). For PeopleSoft Support and helpdesk, users with privilege can clear the SLA, change other items, and reattach the SLA. Additionally, they can attach another service agreement based on the new criteria. This workflow event triggers the SLA Change workflow to create an event history entry indicating a new service agreement code. As such, a new service agreement cycle starts. The system also cancels any outstanding service agreement exception workflows and triggers the rescheduling of the service exception. The user can detach the SLA in the SLA section for a case. PeopleSoft delivers sample data so that only call center managers and help desk managers can detach an SLA.

- SLA Suspension

When an agent changes a case status to *On Hold*, the system triggers an SLA Suspension event. The system sends a notification to the manager. It also cancels any outstanding delayed notifications and service exception workflows.

- SLA Resume

When a manager declines the service agreement suspension or the case is ready to be worked on again, the manager or agent changes the case status from *On Hold* to an *Open* status. The system triggers an SLA Resume event to reschedule service exception workflows.

When a case is not assigned to any agent, a notification is sent to the provider group on the case. If there is no provider group, a default provider group on the Business Unit Setup page is used for notification.

See Also

Chapter 25, "Setting Up and Managing Agreements and Warranties," Configuring the CRM System for Agreement Searches, page 475

Chapter 25, "Setting Up and Managing Agreements and Warranties," page 453

PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook, "Managing Cases"

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Creating and Managing Service Orders"

Performing Entitlement Searches

This section discusses how to search for and view agreements and warranties

Pages Used to Perform Entitlement Searches

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Entitlement Match	RF_ENTL_LIST_SEC	<ul style="list-style-type: none"> From the Case or Service Order page, click the Select Agreement or Warranty link. For PeopleSoft HelpDesk cases, select the Select Agreement link from the Case page. 	View and then select the entitlements defined on the agreement line or warranty that cover the service on a service order or the support offering on a case. This page appears only if multiple agreement lines or warranties meet the entitlement search criteria.

Searching for and Viewing Warranties and Agreements

Access the Entitlement Match page (from the Case or Service Order page, click the Select Agreement or Warranty link).

Case

Entitlement Match

Select One Line for Entitlements

Customize | Find | First 1-2 of 2 Last

Select	Name	Type	Line	Description	Response Time	Restore Time	Service Level
<input checked="" type="checkbox"/>	COM-AGR-102	Agreement	006	Call Support 1001	1 HR-RESP	4 HR-REST	PREM-SL
<input type="checkbox"/>	ALL CUSTOMERS	Agreement	001	Default Coverage Product 1001	1 DAY-RESP	1 DAY-REST	STD-SL

Details

Description Call Support 1001

Holiday Schedule

Entitlement Details

Customize | Find | First 1-6 of 6 Last

Entitlement Name	Description
1 HR-RESP	One hour guaranteed response
4 HR-REST	Four hour guaranteed restore
PREM-SL	Premium Service Level
PREMIUM-01	Premium Expense Coverage
PREMIUM-02	Premium Material Coverage
PREMIUM-03	Premium Time Coverage

Product Information

Customize | Find | View All | First 1 of 1 Last

Product ID	Product Description	Currency	Transaction Price
SR1001	6600 BTU Room Air (Light Beige	USD	0.00

OK

Cancel

Entitlement Match page

The system displays agreements and warranties that meet the entitlement search criteria that is entered for the service order or case. Select the appropriate agreement line or warranty for the case or service order. The system displays the details for the agreement line or warranty in the Details group box. You can only select one agreement line or warranty.

Note. If you have not saved the service order, you can perform another entitlement search and select a different warranty or agreement line by clicking the Edit button on the Service Order page.

For cases, agents can attach an agreement, but only the manager can detach it once it saved. When an agent selects an agreement on a case, he or she can still perform another search by clicking the Clear link and selecting a different agreement before saving the case.

Once the case is saved, only the manager has the privilege to change the agreement. This is controlled through the rule-based security that is defined in the Display Template Component pages for the Clear field. PeopleSoft delivers help desk manager and call center manager as sample data and provides these user IDs with the ability to detach agreements.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates."

Select One Line for Entitlements

Name and Type	Displays the name (agreement or warranty) of the entitlement match. Click the adjacent Agreement or Warranty Transfer button to access the corresponding Agreement or Warranty component.
Renewal Number	Displays the renewal number for the agreement. There are no renewals for warranties.
Line	Displays the agreement line number that specifies entitlements for the combination of relevant criteria that has been entered on the case or service order. <hr/> Note. As described earlier in this chapter, the criteria used for identifying agreement lines may include more than just the customer, site, and product ID. <hr/>
Description	Describes the agreement or warranty as it was entered into the system.
Service	Describes the service that is associated with the agreement or warranty. Click the Transfer to Service button to access the Service page and view details of the service as it was entered into the system. The system displays this field for PeopleSoft Integrated FieldService only.

Entitlement Details

Lists the entitlements that define the response time, restore time, service level, or coverage that are contractually owed to the customer as defined by the agreement line or the warranty.

Product Information

Product ID and Product Description	Displays the ID and description of the product
Currency	Displays the currency of the transaction price. The system does not display this field for PeopleSoft HelpDesk.
Transaction Price	Displays the price of the transaction for receiving support or the specified service for the product (repair, preventive maintenance, and so on). The system does not display this field for PeopleSoft HelpDesk.

Purchase Option

Displays the method of purchasing the service or support offering for an agreement or agreement service transaction. The system does not display this field for PeopleSoft HelpDesk.

Options are:

Flat: The service or support offering is purchased for a flat fee.

Prepaid: 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 quantity for the agreement line.

T&M (time and material): The price of the service or support offering per transaction is based on the labor rate.

Remaining Quantity

Displays the amount of unused, prepaid quantity. 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 decreases this quantity by 1 service order or the appropriate number of hours specified in the timelog as billable each time a service order that is covered by the agreement line is saved.

If the service order is canceled, the system increases the appropriate number of hours or remaining quantity by 1. For support agreements, workflow processes must be implemented to update remaining quantity. Lines with zero remaining prepaid quantities are not shown.

Note. The system makes any agreement line available for selection that has more than one product for which there are some products with a zero prepaid balance and some products that have a positive prepaid balance or do not use the prepaid purchase option. If the user selects that line, the system makes the corresponding detail section with the product lines that have zero prepaid balances unavailable for selection.

See Also

Chapter 27, "Performing Entitlement Searches for Cases and Service Orders," Understanding Entitlement Searches, page 531

Chapter 25, "Setting Up and Managing Agreements and Warranties," page 453

Part 8

SmartViews

Chapter 28

Setting Up SmartViews

Chapter 29

Working with SmartViews

Chapter 28

Setting Up SmartViews

This chapter provides an overview of SmartViews and discusses how to set them up to work in PeopleSoft CRM.

Understanding SmartViews

This section discusses:

- SmartViews framework overview.
- Use of templates.
- Metrics and terms.
- Data storage.
- Audiences and segment groups.
- SmartViews security.

SmartViews Framework Overview

The SmartViews framework enables you to effectively manage key customer groups in a centralized environment where current customer performance information is shared among authorized users. Use this framework to create a configurable, customer-centric view of the enterprise. Through SmartView templates, you can set metrics to view customer performance or measure it in respect to target values. SmartView users can personalize metrics to view meaningful data about customer segments down to the individual account level. They can also perform predefined actions on customers, such as creating a campaign, a plan, or sending correspondence to communicate the SmartViews with interested parties across the company.

The customer-centric view of the enterprise is a SmartView. It is constructed using two elements:

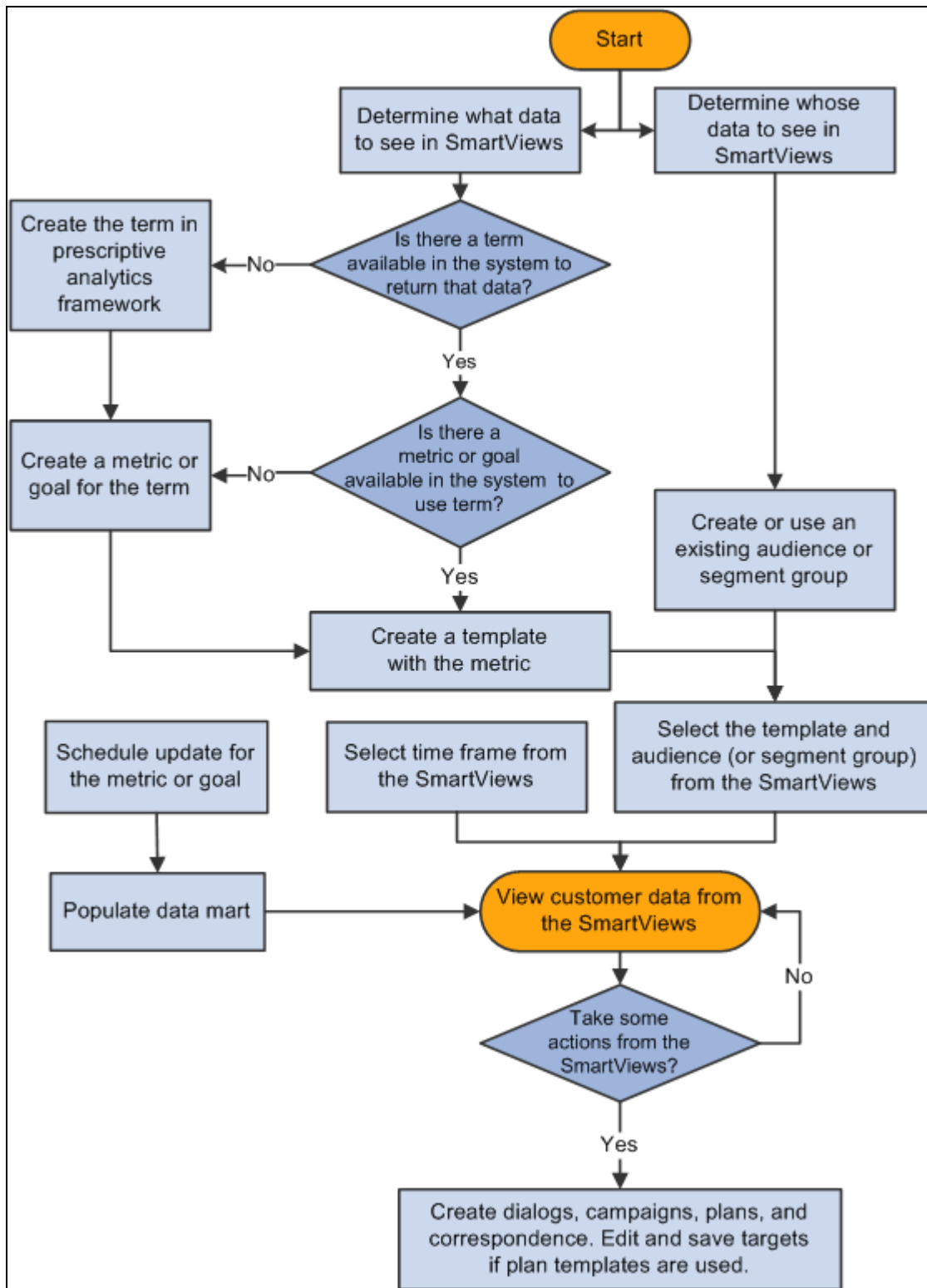
- Templates

A template dictates what data users are able to see in SmartViews.

- Customers

Customers are grouped as audiences or segment groups. The SmartViews displays data that pertains to the selected audience or segment group.

This diagram illustrates the high-level process of setting up templates and customers and using these components in SmartViews:



Process flow for setting up and using SmartViews

Use of Templates

A template determines which data you see in the SmartViews for each selected audience or segment group (collectively) and customers that belong to it (individually). SmartViews operates in these modes:

- *Plan mode* if Strategic Account Planning is licensed.
- *Metric mode* is supported whether or not Strategic Account Planning is licensed.

When creating a template, you reference one or multiple relevant goals or metrics. Each of them is regularly resolved into customer-specific data through a batch process and is displayed on the My SmartViews page at runtime. From there, users can view meaningful information about customer segments or audiences and each of their individual accounts. Goals and metrics are functionally similar, except that goals support target values as well. Users can edit target values directly on the My SmartViews page and view the variance between target and actual values.

If PeopleSoft Marketing is licensed, SmartViews support the use of audiences and segment groups (segments) in the plan and metric modes; otherwise, only audiences are supported. In this case, you would create audiences from the save search feature (for Lead, Opportunity, Person, and Company) because the Manage Audiences component is not available (part of the marketing application).

Plan Mode

Users can leverage planning templates and goals that are defined for Strategic Account Planning and use them in SmartViews. In the plan mode, users can select segment/audience or account planning templates for the segment group or audience they are viewing. They can modify target values of goals in the SmartViews directly and save the updates in respective plans.

SmartViews can validate a goal target if the goal can be aggregated. When segment/audience type templates are used, users can validate the aggregated target values of the child level against the total value at the audience or segment level. Note that the target value of the audience or the highest-level segment doesn't always equal the sum of its child accounts or segments. This happens typically when users manually update target values and, over time, the numbers don't match.

The system displays a message for each goal that it validates; if the message shows a discrepancy between the total number at the parent level and the sum of target values at its child level, users can modify them accordingly.

Note. No data is displayed in the SmartViews if you choose to view a segment group with an account planning template, because account templates apply to accounts only.

In the plan mode, the SmartViews displays target values for accounts, audiences, or segments if they belong to plans that are based on the selected template with the same time frame. If values cannot be returned for some reason (for example, there's no plan associated with a particular account or the time periods don't match), the system provides explanatory messages on the SmartViews.

Metric Mode

SmartViews work like a reporting tool in the metric mode. In this mode, you define metrics (measurements of key performance) and associate them in SmartView templates that you create to monitor customer performance. The metric mode is available whether or not Strategic Account Planning is licensed.

Note. Planning templates and goals are not available when Strategic Account Planning is not licensed.

When SmartViews are displayed in metric mode, users can see the actual metric values for each segment or account of the selected segment group or audience. Unlike in plan mode, where the status, target values, and variance values can be available if so configured, users don't see this information in the metric mode (with the exception of history variance).

See Also

PeopleSoft Enterprise Strategic Account Planning 9.1 PeopleBook, "Creating Segment and Audience Plans"

PeopleSoft Enterprise Strategic Account Planning 9.1 PeopleBook, "Setting Up PeopleSoft Strategic Account Planning"

Metrics and Terms

A metric is a measurement of key performance; for example, lead count, number of products owned, or number of cases. In the definition of a metric (or goal), you specify a term that represents it. The idea of a term comes from the Active Analytics Framework; it's metadata with a user-friendly name and it refers to a piece of information that could either exist physically anywhere in the system or could be derived. It is stored in the data library, which is part of the active analytics framework.

SmartViews run a scheduled batch process to retrieve metric or goal values. This process resolves terms (referenced in metrics or goals) into data that pertains to each account or segment that is displayed on the SmartViews. Users can control which goal or metric and what type of values (for example, actual, history, and target values) to see through the user's personalization.

SmartViews deliver terms for data related to sales, marketing, partners, and wealth management; leverage them when you create new goals and metrics. For a list of terms that are delivered by SmartViews, navigate to Enterprise Components, Active Analytics Framework, Data Library, Manage Terms and search with the context name of Portfolio Segment.

Terms are organized in a tree structure called the subject area. When administrators define metrics and specify SmartViews-specific terms, those terms are available under the SmartViews folder of the Term Selection page.

Take advantage of goals if you license Strategic Account Planning. Goals, if defined to support both planning and SmartViews usage, can be used as metrics in SmartView templates. The difference between using goals in planning templates and SmartView templates is that the setup on target values and assessment in goals doesn't apply to SmartView templates. Therefore, SmartViews don't show target data when users select a SmartView template.

See Also

[Chapter 28, "Setting Up SmartViews," Defining Metrics, page 553](#)

PeopleSoft Enterprise Strategic Account Planning 9.1 PeopleBook, "Measuring the Attainment of Plan Goals," Establishing Plan Goal Metrics

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework," Understanding AAF

Term Creation: Considerations

For a term to function properly in the SmartViews context, it must have an implementation that is defined for the following context:

- Account Plan - Returns information for a given person. It calculates the information based on the following parameters:
 - BO_ID and ROLE_TYPE_ID - these two parameters define for whom the calculation is intended.
 - START_DATE and END_DATE - these two parameters define the begin and end dates of a period for which the calculation should be made.
 - CURRENCY_CD - this parameter is used by terms of which the return data is currency-based; thus the currency in which the data should be returned.
- Audience/Segment Plan - Returns the information for a given audience or segment. It calculates the information based on the following parameters:
 - SETID and RA_LIST_ID - these two parameters define the audience or segment for which the term should be calculated.
 - SEG_START_DATE - this date defines which segment composition should be used based on the given date.
 - START_DATE and END_DATE - these two parameters define the begin and end dates of a period for which the calculation should be made.
 - CURRENCY_CD - this parameter is used by terms of which the returned data that is currency-based, thus the currency in which the data should be returned.
- Segment Group - Returns the information for a given segment group. It calculates the information based on the following parameters:
 - SETID and RA_SEGMENT_GRP_ID - these two parameters define the segment group for which the term should be calculated.
 - SEG_START_DATE - this date defines which segment composition should be used based on the given date.
 - START_DATE and END_DATE - these two parameters define the begin and end dates of a period for which the calculation should be made.
 - CURRENCY_CD - this parameter is used by terms to return data that is currency-based.
- Portfolio Segment - Used by the Datamart. It calculates all the BO_ID objects for all the currently defined periods based on all the SmartViews and templates selected by the users.
 - SETID and RSP_GOAL_ID - these two parameters define which goal should be calculated.
 - CURRENCY_CD - this parameter is used by terms to return data that is currency-based.

If there are conditions that the term cannot handle, the system can create an exception and pass it to the calling program; for example:

```
throw CreateException(18149, n, "NMG: Data doesn't exist for this role type.");
```

where n is a number greater than 200. Define a message number in message set 18149 with n greater than 200.

Data Storage

SmartViews caches data to facilitate page rendering when the SmartViews is first loaded or subsequently updated. The system provides an application engine (AE) program called RPM_DATAMART that is responsible for retrieving and computing specified goal or metric data and storing it in a predefined data mart.

You can define batch processes to run the AE program on a regular basis; for example, nightly, or every few hours. The system retrieves data from the data mart when metric templates are used. When planning templates are used, data comes from Strategic Account Planning directly.

Among the enabled goals or metrics, the AE program updates those that are included in any template that has been selected by users on the Configure My SmartViews Profile page to view SmartViews, for the specified time period. Each one of them is updated for every member that belongs to the selected audience or segment group as well as the audience or segment groups themselves as a whole.

For example, if there's one selected audience on the Configure My SmartViews Profile page and it has three accounts associated with it, the AE program returns a total of four metric or goal values.

Users can get realtime goal or metric data anytime they're reviewing the SmartViews, if so configured. This functionality applies to actual data for goals whose calculation method is set to *automatic*.

See Also

[Chapter 28, "Setting Up SmartViews," Setting Up SmartViews, page 550](#)

Audiences and Segment Groups

Audiences and segment groups are the two forms of customer groupings that can be referenced on the SmartViews.

Audience

An audience is a logical grouping of customers (accounts) that can consist of contacts for companies or partners, and consumers. Customers in an audience may originate from multiple setIDs depending on how you set up the selection criteria. There are a few ways to create audiences; you can use the audience builder in the Manage Audience component of PeopleSoft Marketing, or configurable search pages of components that enable the creation of audiences, such as Lead, Opportunity, Person and Company. In SmartViews, an audience is represented by consumers and companies or partners to which its contacts belongs.

Compared to the Manage Audience component that bases its audience count on the number of consumers and contacts, the audience count that is displayed in the SmartViews is always equal or fewer because a company or partner often has multiple contacts.

SmartViews display only generated and published audiences. For audiences to be used in SmartViews, they have to meet these conditions before the generation process occurs:

- Must be at the status of *Approved* or *Committed*.

- The Published check box is selected.

See *PeopleSoft Enterprise CRM 9.1 Marketing Applications PeopleBook*, "Using Audiences," Creating and Managing Audiences.

Segments

A segment is a type of audience, a group of customers as defined by selection criteria. Every segment is associated with a segment group, which represents a multiple-level hierarchy that contains segments, each of which can have its own child segments.

You can define parent-child relationships between segments by referencing the parent segment in the child segment's definition, and each segment is associated with the segment group of its parent. The structure of the lowest level segments is the same as audience, which consists of customers of the same or different roles.

A segment consists of a group of company or partner contacts, or consumers. In most cases, they will be subcategorized and be available among its child segments (if any). In SmartViews and Strategic Account Planning, the customer counts at non-leaf segments are aggregated and become the total count of leaf segments.

Similar to audience, the count that is displayed in segments (in the Segment component) may not match the count that is displayed on SmartViews because the former count is for contacts and the latter is for companies and partners. In the Segment component, if a segment has customers at the parent level and they do not belong to any child segment, they are not included in Strategic Account Planning and SmartViews.

Segments and segment groups are available if you license PeopleSoft Marketing.

For segments to be displayed in the SmartViews as part of their segment group, they need to be generated and published. The same is true with audiences. Segments should be in either the *Approved* or *Committed* status and have the Published check box selected before the generation process starts.

See *PeopleSoft Enterprise CRM 9.1 Marketing Applications PeopleBook*, "Using Audiences," Creating and Managing Audiences.

Plan Creation in Audiences and Segments

Users can create plans for audiences or segments that are already published on the Plans page of the Manage Audience component, if they are given the proper permission to the plan component. The Plans page doesn't appear if the corresponding audience or segment is not published.

From the My SmartViews page, users can create plans for the audience or segment group that they are looking at. The plan creation action is available once the system verifies that the sign-in user has access to the component. Based on the type of template that is selected, users can choose to create account plans (for *account* templates) or account and audience plans (for *segment/audience* templates). To ensure that users have access to the plans they create, the appropriate dataset rules must be present to grant them the permission. For example, set up a dataset rule that allows access to plans that are created by the sign-on user.

See [Chapter 29, "Working with SmartViews," Working with SmartViews, page 561.](#)

SmartViews Security

Data access in the SmartViews is restricted to authorized users as it often contains sensitive information. When the SmartViews is in the metric mode, users can see customer data for an audience or segment (within the segment group) only if they are a team member of the corresponding audience or segment. If the SmartViews is in plan mode, they need to be a plan team member of the selected template to see the data. The SmartViews displays a padlock icon next to the audience or segment that users cannot access. The icon indicates that it cannot be viewed.

Security for Historical Data

You can set up SmartViews to display data from past time periods and for comparison with current data. Users personalize how they want historical customer data to appear by selecting the frequency (for example, annually and quarterly) and the number of times to retrieve the data for the selected frequency (for example, two previous quarters).

Historical data is only available for time frames that are defined in the system. To view past data of an audience or segment, users need to be a current team member of the audience or segment when in metric mode. If users are viewing the SmartViews using a plan template (that is, in plan mode), users need to be a current team member of that plan *and* the audience or segment that is displayed.

Through personalization, users can select to view target and actual values for past periods as historical data, and historical variance that is calculated:

Historical variance = (current actual value – previous actual value) / previous actual value

See [Chapter 29, "Working with SmartViews," Configuring Display Options for Historical Data, page 568.](#)

Security for Audience and Segment Selection

To select audience and segments for the SmartViews, users must either be a team member, or share a role that the audience or segment has specified as a team role.

See [Chapter 29, "Working with SmartViews," Viewing SmartViews, page 562.](#)

Security for Actions

SmartViews determine the list of available actions on the SmartViews based on the permission that is given to the sign-on user and the availability of the components that perform the actions. For example, if a user doesn't have permission to create a marketing dialog, this action is not available when the user accesses the My SmartViews page, even if PeopleSoft Marketing is licensed.

Users cannot create account, audience, or segment plans if a SmartView template is selected to view the SmartViews.

See [Chapter 29, "Working with SmartViews," Viewing SmartViews, page 562.](#)

Setting Up SmartViews

This section discusses how to:

- Define system data.
- Define metrics.
- Specify time frames for metric updates.
- Define SmartView templates.
- Generate audiences.
- Schedule process for caching metric data.
- View scheduled update results.

Pages Used to Set Up SmartViews

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
SmartViews System Data	RPM_SYSTEM_DATA	Set Up CRM, Product Related, SmartViews, System Data, SmartViews System Data	Specify the currency code, display option, and actions that users can perform on SmartViews.
Metric	RSP_GOAL_TBL	Set Up CRM, Product Related, SmartViews, Define Metrics, Metric	Define metrics that are used to measure SmartViews performance. They are identical to goals in Strategic Account Planning and can be referenced in SmartView templates if you don't license Strategic Account Planning. Both metrics and goals can be aggregated if specified; while the system uses the aggregated goal value to perform target value validation, the aggregated metric value is currently not used in any processing.
Update	RPM_GOAL_UPDATE	Set Up CRM, Product Related, SmartViews, Define Metrics, Update	Specify the time frames by which the metric value needs to be calculated and updated in data mart.
SmartView Template	RSP_PLANNING	Set Up CRM, Product Related, SmartViews, SmartView Templates, SmartView Template	Define templates for SmartViews. Use these templates to view the SmartViews if you do not use Strategic Account Planning plan templates.

Page Name	Definition Name	Navigation	Usage
Configure Search Save	RB_FILTER_SAVE	Click the Save Search Criteria link on the search page of any component that supports the generation of audiences in the configurable search page.	Create an audience in the configurable search page.
Schedule Updates	RPM_TL_RUN	Set Up CRM, Product Related, SmartViews, Schedule Updates, Schedule Updates	Schedule to run an application engine process that updates metric data.
View Updates Result	RPM_UPDATE_SRCH	Set Up CRM, Product Related, SmartViews, View Updates Result, View Updates Result	View status information on goals and metrics after the update process has run.

Defining System Data

Access the SmartViews System Data page (Set Up CRM, Product Related, SmartViews, System Data, SmartViews System Data).

SmartViews System Data

*Cache Data in Currency Code US Dollar

*Maximum number to display

Action Lists				Customize Find View All First 1-5 of 5 Last
*Action Code	*Action Name	Application Class Path	Long Description	
CAMP	Create Campaign	RPM_DASHBOARD:ACTIVITIES:Campaign	Create Audience/Segment Campaign	
CORR	Create Corresp	RPM_DASHBOARD:ACTIVITIES:Correspon	Create Correspondence for individual	
DIAL	Create Dialog	RPM_DASHBOARD:ACTIVITIES:Dialog	Create Audience/Segment Dialog	
PLA2	Create Plan	RPM_DASHBOARD:ACTIVITIES:Plan	Create Audience/Segment Plan	
PLAN	Create Account	RPM_DASHBOARD:ACTIVITIES:Plan	Create Account Plan	

Add New Action

SmartViews System Data page

Note. A user with the SmartViews Administrator role should complete the setup on this page before data caching for SmartViews begins. This is a one-time setup that you will seldom change. If you do make changes on this page, the system requires that you clear all of the cached data for the new setup to take effect.

Cache Data in Currency Code Select the default currency that is used for computing goal or metric data and populating it in data mart.

Warning! Refrain from changing this value after the system is in production—it can cause unexpected behavior in the system.

Maximum number to display

Enter the maximum number of customers to display for an audience in the My SmartViews page. To optimize performance, the suggested value is 300. In addition, users can set up the filter to refine the list customers that return.

Action Lists

This grid contains a list of system delivered actions that you can invoke for the SmartViews. Engage consulting effort if you wish to add custom action; SmartViews provides the infrastructure where you can reference the custom application class code that is written to execute respective actions.

See Also

Chapter 29, "Working with SmartViews," Working with SmartViews, page 561

Defining Metrics

Access the Metric page (Set Up CRM, Product Related, SmartViews, Define Metrics, Metric).

MetricUpdate

SetID

IPROD

Description

Appliances

Metric ID

1022

*Goal Name

Number of Campaigns

Short Name

Campaigns#

*Usage

SmartViews

*Status

Active

Term Name

Number of Active Campaigns

☒ Can Be Aggregated

*Type

Quantity

Variance Indicator

High is Positive

Date Created

04/05/2004 4:53PM PDT

JDIAMOND

Diamond,Jack

Last Modified

04/05/2004 6:05PM PDT

JDIAMOND

Diamond,Jack

Metric page

SmartViews supports the use of goals, which are defined for use in Strategic Account Planning and SmartViews, in SmartView templates. Define metrics if you do not license Strategic Account Planning. Metrics are applicable to SmartView templates only.

Goal Name and Short Name

Enter the standard (required) and short names of the metric.
Give a descriptive short name and limit its length to 10 characters or fewer. SmartViews displays the short names of metrics as part of the column headings to identify the metrics. If the short name is not available, the system takes the first 10 characters of the standard name to be the short name.

Usage	<p>Displays the application that uses the metric. The value is always <i>SmartViews</i>, and it's not editable.</p> <p>If you define a goal, the usage can be <i>SmartViews</i>, <i>Planning</i> (strategic account planning), or <i>Both</i>.</p>
Term Name	<p>Specify an Active Analytics Framework term that is used to retrieve data for the metric for measuring SmartViews performance.</p>
Type	<p>Select the type of data that is returned. Choose from <i>Amount</i>, <i>Other</i>, <i>Percent</i>, and <i>Quantity</i>.</p>
Variance Indicator	<p>Select to indicate whether a high attainment is positive or not. Options are: <i>High is Positive</i> and <i>Low is Positive</i>.</p> <p>For example, if the term is <i>number of leads</i> and it's good that the returned value is higher than the target value, select <i>High is Positive</i> for this term.</p>

See Also

PeopleSoft Enterprise Strategic Account Planning 9.1 PeopleBook, "Measuring the Attainment of Plan Goals," Establishing Plan Goal Metrics

Specifying Time Frames for Metric Updates

Access the Update page (Set Up CRM, Product Related, SmartViews, Define Metrics, Update).

MetricUpdate

SetIDIPRODDescriptionAppliances

Goal NameNumber of CampaignsShort NameCampaigns#

☒ Can Be Used In Real Time

Timeframe To Be Updated

CustomizeFindView All1 of 1FirstLast

	Enable	*Time Frame	Begin Date	End Date	*Date to Begin Calculation	*Date to End Calculation	
1	<input checked="" type="checkbox"/>	2004 BY MONTH-2004	01/01/2004	12/31/2004	01/01/2004	12/31/2004	

Add New Timeframe

Update page

Can Be Used In Real Time

Select this check box if you want the metric to automatically update when you click the Fetch Real Time Data button on the My SmartViews page. When you click this button, the system updates the actual values for all the metrics and goals, which have this check box selected, that appear on the page.

Fetching realtime data for terms can affect system performance, especially KPI (key performance indicator) terms that reference data from external sources. Be cautious about enabling this option for terms.

Timeframe To Be Updated

This grid lists the time periods within which the metric data is updated. Select from the predefined active time periods that are established in the Time Frames component with usage set to either *all* or *planning & SmartView*. Selecting a time frame automatically populates the Begin Date and End Date fields.

Enter a date range using the Date to Begin Calculation and Date to End Calculation fields for the system to determine if a schedule update needs to occur. When the time comes, the system verifies that the start time falls within this date range; if it does, the update for the corresponding time frame takes place.

If you select the metric to be updated through the AE program, the program retrieves data for the metric within the selected time frames at a frequency defined in each one of them.

Note. When defining a time frame period for use in SmartViews, make sure that you enter a 10-character short description, which is used to specify the time frame on the column heading for each goal or metric.

See Also

Chapter 15, "Defining Holiday Schedules," Defining Holiday Schedules, Time Frames, and Sales Quota Rollups, page 247

Chapter 28, "Setting Up SmartViews," Setting Up SmartViews, page 550

Defining SmartView Templates

Access the SmartView Template page (Set Up CRM, Product Related, SmartViews, SmartView Templates, SmartView Template).

SmartViews Template

[Save](#)
[Refresh](#)
[Add Template](#)
[Search](#)
[Notification](#)
[Clone](#)
[Personalize](#)

Template Name Customer Profile **Status** Active
SetID IPROD **Start Date** 01/01/2004
End Date 12/31/2004

[Details](#)
[Notes](#)

Template Details

Name Customer Profile ***Status** Active
Description Customer Profile

Start Time Frame **End Time Frame**
Start Date 01/01/2004 **End Date** 12/31/2004

Identify Metrics
[Customize](#)
[Find](#)
[View All](#)
[First](#)
[1-4 of 4](#)
[Last](#)

[Details](#)
[Variance Indicator](#)

Metric Name	Type	Measured By
Customer Since	Quantity	Number of Months Since First Order
Number of Campaigns	Quantity	Number of Active Campaigns
Number of Products Owned	Quantity	Total Number of Unique Products Own
Total Order Amount	Amount	Total Order Amount

SmartView Template page (1 of 2)

Template Editors

[Customize](#)
[Find](#)
[View All](#)
[First](#)
[1-3 of 3](#)
[Last](#)

Owner	Name	Phone	Title
<input type="checkbox"/>	Spencer Underwood		Support Agent
<input checked="" type="checkbox"/>	Burt Lee		Sales Manager
<input checked="" type="checkbox"/>	Jack Diamond		Marketing Manager

First Name
Last Name
[Add Team Member](#)

[Audit History](#)

SmartView Template page (2 of 2)

The interface of the SmartView Template component is almost identical to the Planning Template component. The differences between the two components are:

- Some page fields that are specific to planning templates are not displayed in the Template Details group box; for example, Usage, Plan Type, Frequency, Currency and Lock Down Changes to Plan Targets.
- The Objectives and the Plan Team Members group boxes do not appear.

See *PeopleSoft Enterprise Strategic Account Planning 9.1 PeopleBook*, "Setting Up Planning Templates."

Generating Audiences

This section discusses how to generate audiences and segments using the saved search method. For more information on other ways to generate audiences and segments and their functionality, please refer to the documentation for the marketing application.

Access the search page of the Lead, Opportunity, Person, or Company component and click the Save Search Criteria link after performing a search you wish to save.

Configurable Search Save page

In addition to saving your search criteria for future use, you can save the search result as an audience. Make sure that the Publish check box is selected so that the audience can be used in SmartViews after it is generated.

Please refer to the PeopleSoft Marketing documentation for more information about creating segments and other ways to generate audiences.

See Also

PeopleSoft Enterprise CRM 9.1 Marketing Applications PeopleBook, "Using Audiences," Creating and Managing Audiences

Scheduling Processes for Caching SmartView Data

Access the Schedule Updates page (Set Up CRM, Product Related, SmartViews, Schedule Updates, Schedule Updates)

Schedule Updates

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

Description:

Goals/Metrics				Customize	Find	View All	First	1-4 of 4	Last
Enable	*SetID	*Goal ID	Goal/Metric Name						
<input checked="" type="checkbox"/>	<input type="text" value="IPRO"/>	<input type="text" value="1012"/>	Partner Quotes						
<input checked="" type="checkbox"/>	<input type="text" value="IPRO"/>	<input type="text" value="1013"/>	Partner Revenue						
<input checked="" type="checkbox"/>	<input type="text" value="IPRO"/>	<input type="text" value="1014"/>	Partner Average Order						
<input checked="" type="checkbox"/>	<input type="text" value="IPRO"/>	<input type="text" value="1015"/>	Partner Oppy Revenue						

Schedule Updates page

Note. Do not put spaces in the run control ID.

In the Goals/Metrics grid, enter the goals and metrics to be updated. When you click the Run button on this page, you are transferred to the Process Scheduler Request (PRCSRQSTD LG) page. The system invokes the Run Data Mart Application Engine program (RPM_DATAMART), which retrieves and computes new values for selected goals and metrics as scheduled and populates them in data mart.

It is recommended that you categorize goals and metrics by frequency (yearly, quarterly, monthly, and so on) and create run controls for each applicable frequency. You can then specify the recurring time interval in each run control that is appropriate to its goals and metrics. You can define new recurrence definitions if necessary.

Access to this page is granted to users with the role of SmartView Administrator.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler

Viewing Scheduled Update Results

Access the View Updates Result page (Set Up CRM, Product Related, SmartViews, View Updates Result, View Updates Result)

View Updates Result						
Use Search Criteria to Narrow the Search Results						
View Updates Result						
				Customize	Find	View All
SetID	Goal/Metric Name	Status	Run Control ID	Begin Date/Time	End Date/Time	Message Text
IProd	Customer Meetings	Success	Metrics_Update	04/19/2004 5:56:42PM	04/19/2004 5:56:43PM	Cache Update Successful
IProd	Customer Meetings	Success	Metrics_Update	04/20/2004 4:30:50PM	04/20/2004 4:30:54PM	Cache Update Successful
IProd	Customer Meetings	Success	Metrics_Update	04/20/2004 5:00:17PM	04/20/2004 5:00:18PM	Cache Update Successful
IProd	Number of High Cases	Success	Metrics_Update	04/12/2004 3:03:35PM	04/12/2004 3:03:35PM	Cache Update Successful
IProd	Oppy Revenue (days)	Success	Metrics_Update	04/19/2004 5:56:43PM	04/19/2004 5:56:43PM	Cache Update Successful
IProd	Oppy Revenue (days)	Success	Metrics_Update	04/20/2004 4:30:55PM	04/20/2004 4:30:55PM	Cache Update Successful
IProd	Oppy Revenue (days)	Success	Metrics_Update	04/20/2004 5:00:18PM	04/20/2004 5:00:18PM	Cache Update Successful
IProd	New Leads	Success	Metrics_Update	04/19/2004 5:56:43PM	04/19/2004 5:56:43PM	Cache Update Successful
IProd	New Leads	Success	Metrics_Update	04/20/2004 4:30:55PM	04/20/2004 4:30:55PM	Cache Update Successful
IProd	New Leads	Success	Metrics_Update	04/20/2004 5:00:18PM	04/20/2004 5:00:18PM	Cache Update Successful
Search						

View Updates Result page

This page displays the update status of each goal or metric after the process has run—success or failure. If no goals are defined to be updated, then no status is displayed.

The size of the View Updates Result grid increases over time and, in most cases, you do not need to view schedule updates from more than a week ago. You can set up the system to empty the PeopleSoft Process Scheduler tables and file system periodically. Set this up on the Purge Settings page. For more information about system purge options, please refer to the documentation for PeopleSoft Process Scheduler.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler

Chapter 29

Working with SmartViews

This chapter discusses how to work with SmartViews.

Working with SmartViews

This section discusses how to:

- View SmartViews.
- Configure SmartViews.
- Personalize templates for display.
- Configure display options for historical data.

Pages Used to Work with SmartViews

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
My SmartViews	RPM_DASHBOARD	My SmartViews, My SmartViews	View your SmartViews.
Create Campaign Page	RPM_CAMPAIGN	Select <i>Create Campaign</i> from the Action field and click the Go button.	Create campaigns for selected audiences or segments.
Create Correspondence Page	RPM_CORRESPONDENCE	Select <i>Create Correspondence</i> from the Action field and click the Go button.	Create correspondence requests for selected accounts or segments.
Create Dialog Page	RPM_DIALOG	Select <i>Create Dialog</i> from the Action field and click the Go button.	Create advisor dialogs for selected audiences or segments.
Configure My SmartViews Profile	RPM_SETUP	Click the Configure toolbar button on the My SmartViews page.	Select audience or segment groups that the SmartViews is built for and templates that are used to look at the SmartViews.

Page Name	Definition Name	Navigation	Usage
Personalize Template	RPM_PERSONALIZE	Click the Personalize toolbar button on the My SmartViews page.	Select which goals or metrics and their data types to display on the SmartViews.
Set Template Metric History	RPM_HISTORY	Click the Edit History link on the Personalize Template page.	Configure options to display historical data.
Create Plan	RPM_PLANS	Select <i>Create Account Plan</i> from the Action field and click the Go button.	Create account plans for selected accounts.
Audience Plan	RSP_PLANNING	Select <i>Create Audience Plan</i> from the Action field and click the Go button.	Create audience plans for selected audiences.

Viewing SmartViews

Access the My SmartViews page (My SmartViews, My SmartViews)

My SmartViews page

The view of this page pertains to the signed-in user. When users access this page for the first time, the system displays the Configure My SmartViews Profile page, where they select at least one audience or segment group and one template to build their own SmartViews.

On the My SmartViews page, users review how each member of the selected audience or segment group performs based on the retrieved data that is defined from the selected template.

They can personalize the SmartViews by choosing which goal or metric data columns appear and how historical data is handled. Users can also make changes to target values directly in the SmartViews and save changes to the corresponding plan, if a plan template is used. If necessary, they can perform actions on selected audience or segment group members.

When users click the segment or audience link to transfer to the actual segment and audience, the customer counts that are displayed in parenthesis on the My SmartViews page can be different from what is shown in the component. This is because the number on the My SmartViews page denotes the number of companies or partners in that audience or segment, whereas, in the actual component, the number is translated to the number of contacts associated with the companies or partners.

The SmartViews shows a maximum of eight terms. Every historical data for a term is also treated as a term. SmartViews provides a personalization option for users to refine the data they want to see if there are more than eight terms.

Time Frame

Select a time period within which the SmartViews is displayed. The selected template dictates the available time frames in this drop-down list box. When you select a different template, the values in the Time Frame field may change accordingly.

For planning templates, the time frame selection always includes the current period specified in the template, the period previous to the current period, and the period after the current period.

For SmartViews templates, the time frame selection consists of the applicable time frame period type in the system for the current time you're looking at the SmartViews.

For example, if you access your SmartViews in January 1, 2009, the applicable time frame may include *2009 January*, *2009 first quarter*, *2009 fiscal year*, and so on, depending on the time frame period types that are defined.

For each of these time periods, the selection also includes the one before and the one after the current one. Therefore, for the 2009 January time period, additional time frames 2008 December and 2009 February become available in the Time Frame drop-down field.

Update Display

Click to refresh the My SmartViews page. Make sure to click this button after making changes to the SmartView, Template, Time Frame, or Currency field.



Indicates the audience list. Clicking the adjacent audience link transfers you to the actual audience in the Manage Audiences component in a new browser window.



Indicates consumers. Clicking the adjacent consumer link transfers you to the actual consumer in the Consumer component in a new browser window.



Indicates partners. Clicking the adjacent partner link transfers you to the actual partner in the Partner component in a new browser window.



Indicates workers. Clicking the adjacent worker link transfers you to the actual worker in the Worker component in a new browser window.



Indicates companies. The lowest level of a segment group or audience is always companies. Clicking the adjacent company link transfers you to the actual company in the Company component in a new browser window.



Indicates that the type of the corresponding entity is unsupported, for example, site or broker.



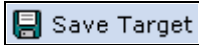
Indicates the segment group.



Indicate segments. Clicking the adjacent segment link transfers you to the actual segment in the Segment component in a new browser window.

If you're in metric mode, click the second folder button of a segment to view a list of customers that belong to the segment. The presentation is identical to viewing an audience.

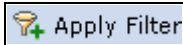
Click the third folder button to return to the segment group view. This drill-down capability is not applicable to the plan mode. The SmartViews is in plan mode when a planning template is in use.



Click to save changes you make on target values to the corresponding plan. This button doesn't apply if the SmartViews is in the metric mode (meaning a SmartViews template is in use).



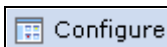
Click to access the Email SmartView page, where you can send email to interested parties with the SmartViews as a .csv attachment. Users need to have an email address defined in the CRM system to send emails on this page. The SmartViews is sent to the user's email address that is specified for the *business* type on the Worker page.



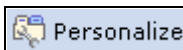
Click to access the Filter SmartView page to filter customers that you see on the SmartViews. By default, the SmartViews shows 300 rows of data (recommended). Specify the row display setting on the SmartViews System Data page.

If you want to change the filter criteria, click the Change Filter button to access the Filter SmartView page and modify the values. Click the Remove Filter button to delete the filter. These two buttons appear only when you have applied filter to the audience or segment group on your SmartViews.

Note. The Apply Filter button does not appear in plan mode.



Click to access the Configure My SmartViews Profile page to select audience (and segment groups) and templates to view the SmartViews.



Click to access the Personalize Template page to select which goals or metrics and their data types to display on the SmartViews.



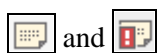
Click to immediately update the actual data for goals and metrics that is enabled for realtime update. The update applies to data in the time period you're currently viewing.



Click to validate the aggregated target values of accounts (or child segments) with the total value at the audience (or segment) level and show the result as pop-up window messages. The system disables this button when a SmartViews or an account template is in use, or when a filter is applied. This functionality is not applicable to goals or metrics that cannot be aggregated as defined.



Click to export the SmartViews grid to a spreadsheet in a new browser window.



Click to access the Summary page to view information pertaining to the corresponding customer. Both icons provide information about the data fetching result and list existing plans that the corresponding customer may have. The alert icon (the one with the exclamation point) is used typically when the system is unable to get certain data and someone in the team may need to review the issue. If you want to review the data fetching result and don't want to click the icon every time, place the cursor over the links; the system displays information about the result.

Action

Select an action to perform for selected customers. System-delivered options include *Plan*, *Campaign*, *Dialog* and *Correspondence*. You can create custom actions by writing application class code and referencing it in the SmartViews System Data page.

You can select to add an audience plan or account plan if you view an audience using a planning template (for audience and segment) on the My SmartViews page. Create one type of plan for the selected customers or accounts at a time.

If you create a campaign for an activity type that uses any of the listed marketing channels, you need to enter the corresponding required values on the Activities page of the Marketing Programs component to save the campaign:

- Order Capture channel: list, offer, and script name are required.
- Facsimile channel: list and package are required.
- Telesales channel: content, offer list, script name, and integration are required.
- Mail channel: list and package are required.
- Sales Agents channel: list is required.
- Advisor channel: advisor ID is required.

Configuring SmartViews

Access the Configure My SmartViews Profile page (click the Configure toolbar button on the My SmartViews page)

Configure My SmartViews Profile

User ID TEST ☐ **Highlight Real-Time Data**

SmartViews					
Default	Name	Type	*Currency Code	Total Count	
<input type="checkbox"/>		Audience	USD	0	

Templates					
Default	Name	Status	Usage	Frequency	
<input type="checkbox"/>	Platinum Appl Partner Sales Plan	Active	Segment	Annual	
<input type="checkbox"/>	2010 Lead Effectiveness	Active	Segment	Quarterly	
<input type="checkbox"/>	2010 Annual Sales Account Plan	Active	Account	Annual	

Configure My SmartViews Profile page

Highlight Real-Time Data

Select to let the system highlight the new and changed data after the fetch realtime data process is complete.

SmartView

This grid lists the audience and segment groups that become available for selection in the SmartView drop-down list box on the My SmartViews page. Select an entry as a default value that always shows up in the SmartView field. To add a new audience or segment group, click the corresponding button to add a new row. If you don't use PeopleSoft Marketing, the Add Segment Group button does not appear.

Note. If you access this page and change the default SmartView while you're in the My SmartViews page, the change takes effect the next time you access the My SmartViews page; for example, when you click the My SmartViews link on the left navigation menu.

Currency Code

Select the default currency to use when this audience or segment group is selected.

Total Count

Specify the number of customers in this audience or segment group.

Template

This grid lists all the planning and SmartViews templates that are created in the system with either goals or metrics. Selected templates become available in the Template drop-down list box on the My SmartViews page. While you can select both active and draft templates to be included in the Template drop-down list box, only the active ones are available at runtime. Specify an active template as the default template used to display your SmartViews.

Note. If you access this page and change the default template while you're in the My SmartViews page, the change takes effect the next time you access the My SmartViews page; for example, when you click the My SmartViews link on the left navigation menu.

Personalizing Templates for Display

Access the Personalize Template page (click the Personalize toolbar button on the My SmartViews page)

Personalize Template

User ID TEST

Template Goals/Metrics									
Enable	Order	Goal Name	Short Name	Status	Target	Actual	Variance	History	Edit History
<input checked="" type="checkbox"/>	10	Partner Leads Converted	PtrLeads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit History

OK Cancel

Personalize Template page

The Status, Target, and Variance check boxes are disabled if you select a SmartView template.

Enable Select to show the corresponding goal or metric on the My SmartViews page.

Status, Target, Actual, Variance, and History

Select the corresponding check box to display data about the goal or metric on the SmartViews:

- Status displays the assessment icon of the goal for each customer. It applies to planning templates only.
- Target displays the current target value of the goal for each customer. It applies to planning templates only.

If the goal is marked as prorated in Strategic Account Planning, a Prorated-T (prorated target) column is shown on the My SmartViews page if the Target check box is selected.

- Actual displays the current actual value of the goal or metric for each customer.

Actual data comes from Strategic Account Planning when SmartViews are in plan mode. In metric mode, SmartViews data is retrieved from the data mart. Because of the difference in the way data is returned, discrepancies may occur if the times when the data was retrieved from both mechanisms are not the same.

- Variance displays the current variance value of the goal for each customer. It applies to planning templates only. The variance value is calculated as:

$$\text{Variance} = (\text{actual value} - \text{target value}) / \text{target value}$$

- History displays historical information about the goal or metric for each customer.

Edit History

Click to access the Set Template Metric History page and specify the criteria for displaying historical data on the SmartViews.

Configuring Display Options for Historical Data

Access the Set Template Metric History page (click the Edit History link on the Personalize Template page).

Period Type and Number of Past Periods

Display the time periods for which historical data can be displayed. The available periods are determined by the period types that are defined in the system.

For example, if the *monthly* period type exists in the system, you can see two period types on this page that pertain to it: *monthly* and *same month of past years*. If you enter 2 as the number of past periods for the *monthly* period type, the system returns two columns of past data for the two months previous to the current date. If you enter 2 as the number of past periods for the *same month of past years* period type, the system returns two columns of past data for the same month as the current date but from the past two years.

Note. The relevant time frame periods in the past must be defined and remain active for the past data to be displayed. Establish time frame periods in the Time Frames component. The usage must be set to either *All* or *Planning & Portfolio* for use in the SmartViews.

Target	Select to display the target value of the past periods (not available if the SmartViews is in the metric mode). Past target values are not editable. The Prorated-T column (reflecting current data) does not apply to historical target data.
Actual	Select to display the actual value of the past periods.
Variance	Select to display the current variance value (not available if the SmartViews is in the metric mode).
History Variance	Select to display the history variance of the current and the past data. History variance applies to time period of the same type.

See Also

Chapter 15, "Defining Holiday Schedules," Defining Holiday Schedules, Time Frames, and Sales Quota Rollups, page 247

Appendix A

Managing PeopleSoft Customer Relationship Management Integration Points

This chapter provides an overview of the interactive services repository, PeopleSoft Customer Relationship Management (PeopleSoft CRM) integration points, and discusses how to:

- Process PeopleSoft Business Interlinks transactions.
- Process inbound service operations.
- Process inbound transactions.
- Process outbound service operations.
- Set up chunking.
- Publish outbound service operations.

Understanding the Interactive Services Repository

The Interactive Services Repository (ISR) is a compilation of information about the numerous service endpoints exposed by Oracle's PeopleSoft Enterprise, JD Edwards EnterpriseOne and JD Edwards World product families. Integration Points, also known as EIPs or XPBs, are the web service connections that enable PeopleSoft and JD Edwards applications to work smoothly with third-party systems and software, as well as other Oracle applications.

ISR works in conjunction with PeopleBooks to help users and implementation specialists fully explore the integration capabilities of our products.

Developers use ISR to document the technical structure of an integration point, its design patterns, and underlying technology. Analysts will use ISR to explore and understand integration points from a business process context. This is especially useful when implementing an Oracle-supported reference business process across multiple products and release versions.

Key Search Features of ISR

ISR contains high-level information about each integration point, including:

- Brief description.

- Product family.
- Product owner.
- Business Process association.
- Data rules.
- Setup rules.

ISR enables you to quickly discover the integration points that are relevant to your specific needs. You can search for integration points by name, integration set, product, between products, business process, and technology type. Use My Oracle Support to access ISR.

See Also

<http://www.peoplesoft.com/corp/en/iou/isr/index.jsp>

Understanding PeopleSoft CRM Integration Points

PeopleSoft CRM integration points enable you to:

- Send or publish service operations to a third-party system.
- Accept or subscribe to service operations from third-party systems.
- Send a synchronous request and reply transaction to a third-party system for processing.

Processing PeopleSoft Business Interlinks Transactions

Sometimes PeopleSoft CRM needs to call an external system vendor's application to request information. This information must be provided in a realtime, synchronous mode. The PeopleSoft application waits for the answer from the other application in realtime, before the PeopleSoft application can continue processing.

These transactions use PeopleSoft Business Interlinks definitions to specify the data passed to this external system as well as to define the output 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, and then passes it, in the correct form, back to the interlink object.

Note. Business Interlink are just one of the ways you can process realtime transactions. There are many different ways you can capture this kind of information. Please refer to the ISR on My Oracle Support for more information.

See Also

<http://www.peoplesoft.com/corp/en/iou/isr/index.jsp>

Enterprise PeopleTools 8.50 PeopleBook: PeopleCode API Reference

Processing Inbound Service Operations

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 interacting with the PeopleSoft system. Each option provides audit trails, validations, and error handling to insure that data integrity is maintained within the PeopleSoft database.

See http://www.peoplesoft.com/corp/en/iou/optimize/doc_software.jsp.

Understanding the Inbound Transaction Architecture

Depending on the requirements of the interacting system and the integration point within the PeopleSoft system, various technologies are used to receive transactions into the PeopleSoft system:

Application Message Based Transaction

The PeopleSoft Application Messaging functionality provides a method for asynchronous communications between external systems and PeopleSoft applications using industry standard XML-formatted messages. XML messages are automatically loaded into the PeopleSoft system by setting the queue status to run for 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 get associated to handlers. Handlers are then defined on a service operation.

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.

Electronic Data Collection Transaction Pages

PeopleSoft CRM includes transaction pages for many of the inbound transactions. The transaction pages are designed for quick data entry. There are minimal edits, and no application database updates are performed in these pages as the background programs scanning the transaction logs handle detail processing. The transaction pages provide a method of quick data entry for much of the transaction-based information processed by the system. You can enter the transactions directly onto the page, or attach a wedge and bar code reader to take advantage of bar code scanning benefits.

System-Generated Transactions

Several transactions that are fed in the transaction log are generated from internal application programs. By generating these transactions, applications push heavy processing functions to a background mode.

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 status in the transaction log is changed to *Error*, and rows are inserted into error tables for each error message.

Error messages appear on the Transaction Maintenance page for transactional type data such as, inventory adjustments and purchase order receipts (select PeopleTools, EDI Manager, View EDI Audit Trail, Transaction Maintenance).

For definitional type data such as item master and bills of material, the Data Definition page is used to review and correct the erroneous information.

Once you have corrected 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. For example, the Consumer and Par Location Count transactions both attempt to update the application tables, but if errors are found, the transactions write the data to the error tables so that corrections can be made.

See Also

Enterprise PeopleTools 8.50 PeopleBook: Integration Broker

Enterprise PeopleTools 8.50 PeopleBook: Integration Broker Administration

Processing Outbound Service Operations

Outbound EIPs exist throughout the PeopleSoft system, providing interface points for third-party applications requiring information as activity occurs within the PeopleSoft system. The 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.

Understanding the Outbound Transaction Architecture

PeopleSoft CRM applications as well as interacting 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 it wants to receive this information.

Component or Incremental Publish

The system generates Component Published messages 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 messages provide the functionality to group many like 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 like transactions based on common information within each transaction. For example, an Advanced Shipping Notice message can be published to a customer when the customer's order is shipped within the PeopleSoft Inventory system. This message may go directly to the customer or it may 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, users can dictate whether to create a single message for all customers to send to the third-party software or create individual messages to send directly to each customer.

PeopleSoft CRM applications all use the Publish Outbound Message process to initiate the Batch Publish messages. Built into this routine is the Batch Publish utility, a common PeopleSoft tool that provides the functionality to group and filter or "chunk" messages as noted 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. File layout objects are easy to modify, and PeopleSoft provides examples for all transactions included in the 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`.

Appendix B

Delivered Web Service and Service Operations for CRM Common Components

This appendix discusses the delivered web services for CRM common components and how to view message elements for tasks and call reports.

Delivered Web Services

This section discusses:

- Task web service.
- Call report web service.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Business Processes and Web Services"

Task Web Service

PeopleSoft CRM delivers these service operations for the Task web service:

- Create Task

This service operation is a synchronous process that takes these inputs to create a task: subject and task type (task types are user defined, for example: MEETING, PHONECALL, and APPOINTMENT).

Optionally, you can supply information on contacts, transactions, assignments and notes to be associated with the task. For each of the optional information you want to add to the task, these values are required as inputs:

- (For Contact) Contact Person ID and contact role type.

Make sure that the person ID entered is valid for the call report creation.

- (For Transaction) Transaction type, transaction market, and transaction SYNC ID.
- (For Assignment) Task assignee and contact role type.
- (For Note) Note summary and start date.

This service operation returns the ID of the task once it is created successfully. No recurring tasks can be created through this web service for this release. Attachments cannot be added as part of the task notes.

- Get Task

This service operation is a synchronous process that takes a valid task ID (full ID; partial ID is considered invalid) and returns the task and its detailed information. It returns an empty result set if the ID is invalid. The user ID that is passed in the message determines the tasks that the user is authorized to view.

- Notify on Task Complete

This service operation is an asynchronous operation that notifies the calling process when a task is completed or canceled. It takes the task ID and sends a response message to notify the calling process when the status of the specified task is changed to either completed or canceled.

- Search Task

This service operation is a synchronous process that takes any of these inputs and returns return a list of tasks and their associated information that match the specified search criteria:

- Task subject.
- Task type.
- Task priority.
- Task status.
- Task start date.
- Task end date.
- Task owner.

If no matches are found, the system returns an empty result set.

- Get a List of Task Types

This service operation is a synchronous process that takes any of these inputs and returns task types that match the specified search criteria:

- Task type.
- Active flag (Y/N).
- Task type description.
- Application usage (for example, ALL = All Applications; CHMG = Change Management; FLDS = Field Service; HLPD = HelpDesk; PIM = Personal Information Mgmt; SSP = Strategic Planning; SALS = Sales; SUPP = Support).

If no matches are found, the system returns an empty result set.

- Update Task Assignee

This service operation is a synchronous process that takes these inputs to add, delete, or update task assignees:

- Task ID.
- Assigned To Person ID.
- Update Action (ADD = Add; DEL = Delete; UPD = Update).

You can also specify these attributes as inputs when you add, delete or update task assignees: assigned status (ACPT = Accepted; CMPL = Completed; DCLN = Declined; OPEN = Assigned) , contact BO ID, contact role type ID, customer BO ID (make sure that the ID is valid), and customer role type ID.

Note. In order to update a task assignee, the status of the task cannot be *Complete* or *Canceled*. Also, the current user has to have access to the task (as defined by the dataset rule RB_MY_TASK) and meets one of these conditions: the user is the owner of the task, OR the user is the assignee of the task *and* the action selected is *UPD*, OR the user has manager privileges but is not an assignee of the task.

At the end of the operation, the system returns three pieces of information in the response message: Task ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

- Update Task Contact

This service operation is a synchronous process that takes these inputs to add, delete, or update task contacts:

- Task ID.
- Contact Person ID.
- Update Action (ADD = Add; DEL = Delete; UPD = Update).

You can also specify these attributes as inputs when you add or update task contacts: contact BO ID, contact role type ID, customer BO ID (make sure that the ID is valid), customer role type ID, and the Primary indicator (Y/N).

Note. In order to update a task contact, the status of the task cannot be *Complete* or *Canceled*. Also, the current user has to have access to the task (as defined by the dataset rule RB_MY_TASK).

You can only have one primary contact in a task. Therefore, if you specify a contact that you add or update as primary, the primary contact flag of the rest of the contacts in the same task is then set to N.

At the end of the operation, the system returns three pieces of information in the response message: Task ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

- Update Task Header

This service operation is a synchronous process that takes the task ID as the input to update task headers. You can specify these attributes that you want to update in the task, which include:

- Task Type.
- Subject.
- Task Priority (task priorities are user defined, for example, 1 = High; 2 = Medium; 3 = Low).
- Status (for example, CMPL = completed; CNCL = Canceled; INPR = In Progress; OPEN = Open).
- Start Date.
- Start Time.
- End Date.
- End Time.
- Time Zone.
- Location.
- Private flag (Y/N).
- Application Usage.
- Person ID of the owner.
- Description.

Note. In order to update a task header, the status of the task cannot be *Complete* or *Canceled*. Also, the current user has to have access to the task (as defined by the dataset rule RB_MY_TASK), and the user must either be the owner of the task, or has manager privileges (but is not an assignee of the task).

At the end of the operation, the system returns three pieces of information in the response message: Task ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

- Update Task Note

This service operation is a synchronous process that takes these inputs to add, delete, or update task notes:

- Task ID.
- Note's Sequence Number.

If you add a new note, the system assigns the next available sequence number to the new note and ignores the one that is supplied.

- Task Summary.
- Update Action (ADD = Add; DEL = Delete; UPD = Update).

You can specify these attributes as inputs when you add or update task notes: subject, start date, end date, and description.

Note. In order to update a task note, the status of the task cannot be *Complete* or *Canceled*. Also, the current user has to have access to the task (as defined by the dataset rule RB_MY_TASK),

At the end of the operation, the system returns three pieces of information in the response message: Task ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

- Update Task Transaction

This service operation is a synchronous process that takes these inputs to add or delete transactions on tasks:

- Task ID.
- Transaction Type (transaction types are user defined, for example, COMPANY, LEAD, OPPRT, and PARTNER).
- Update Action (ADD = Add; DEL = Delete).
- Transaction Market.
- Transaction SYNC ID.

This is the SYNC ID for the corresponding transaction type ID. Make sure that you enter a valid ID.

Note. In order to update a task transaction, the status of the task cannot be *Complete* or *Canceled*. Also, the current user has to have access to the task (as defined by the dataset rule RB_MY_TASK).

You can only have one primary transaction in a task. Therefore, if you specify a transaction that you add or update as primary, the primary contact flag of the rest of the transactions in the same task is then set to N.

At the end of the operation, the system returns three pieces of information in the response message: Task ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

This table provides the technical names, operation type, and messages names of the service operations that are related to the Task web service:

Service Operation	Operation Type	Request Message	Response Message
Create Task(RB_TASK_CREATETASK)	Synchronous	RBTASKCREATEREQ	RBTASKCREATERES
Get Task (RB_TASK_GETTASK)	Synchronous	RBTASKGETREQ	RBTASKGETRES
Notify on Task Complete (RB_TASK_NOTIFYONCOMPLETE)	Asynchronous (Request/Response)	RBTASKNOTIFYONCOMPLETEREQ	RBTASKNOTIFYONCOMPLETERES
Search Task(RB_TASK_SEARCHTASK)	Synchronous	RBTASKSEARCHREQ	RBTASKSEARCHRES
Get a List of Task Types (RB_TASK_TASKTYPELIST)	Synchronous	RBTASKTYPELISTREQ	RBTASKTYPELISTRES
Update Task Assignee (RB_TASK_UPDATEASSIGNEE)	Synchronous	RB_TASK_UPD_ASGN_REQ	RB_TASK_RESULT_RES
Update Task Contact (RB_TASK_UPDATECONTACT)	Synchronous	RB_TASK_UPD_CNTCT_REQ	RB_TASK_RESULT_RES
Update Task Header (RB_TASK_UPDATEHEADER)	Synchronous	RB_TASK_UPD_HDR_REQ	RB_TASK_RESULT_RES
Update Task Note (RB_TASK_UPDATENOTE)	Synchronous	RB_TASK_UPD_NOTE_REQ	RB_TASK_RESULT_RES
Update Task Transaction (RB_TASK_UPDATETRANSACTION)	Synchronous	RB_TASK_UPD_TXN_REQ	RB_TASK_RESULT_RES

Call Report Web Service

PeopleSoft CRM delivers these service operations for the Call Report web service:

- Create Call Report

This service operation is a synchronous process that takes these inputs to create a call report: subject and event type (user maintained, some values are MTG, PHON, and OTHE) for the call report.

Optionally, you can supply information on contacts, transactions, and notes to be included in the call report. For each of the optional information you want to add to the call report, these values are required as inputs:

- (For Contact) Person ID.

Make sure that the person ID entered is valid for the call report creation.

- (For Transaction) Transaction type, transaction market, and transaction SYNC ID.
- (For Note) Note summary.

This service operation returns the ID of the call report once it is created successfully.

- Get Call Report

This service operation is a synchronous process that takes the call report ID and returns the call report and its detailed information (if the ID is valid). It returns an empty result set if the ID is not valid.

Note. In order to get results successfully, the current user must have access to that call report (as defined by the call report dataset rule RD_CR_LIST_TXN).

- Search Call Report

This service operation is a synchronous process that takes at least one of these inputs to find and return call reports that match the search criteria:

- Call report ID.
- Call report subject.
- Call report date.
- Call report type.
- Call report location.

You can also specify the call report related task ID and application usage as additional criteria. This service operation returns one or more call reports that satisfy the search criteria. It returns an empty result set if it cannot find any call report matching the search criteria. The RB_MORERES_FLAG flag is set to *True* if more than 300 call reports are found.

Note. In order to get search results successfully, the current user must have access to them (as defined by the call report dataset rule RD_CR_LIST_TXN).

- Update Call Report Header

This service operation is a synchronous process that takes the call report ID and attributes that you want to update in the call report, which can be:

- Call report event type (user defined).
- Call report subject.
- Call report date.
- Call report location.
- Application usage (for example, ALL = All Applications; CHMG = Change Management; FLDS = Field Service; HLPD = HelpDesk; PIM = Personal Information Mgmt; SSP = Strategic Planning; SALS = Sales; SUPP = Support).

Note. In order to update a call report header, the current user must have access to that call report (as defined by the dataset rule RD_CR_LIST_TXN).

At the end of the operation, the system returns three pieces of information in the response message: Call Report ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

- Update Call Report Contact

This service operation is a synchronous process that takes these inputs to add, delete, or update call report contacts:

- Call report ID.
- Contact Person ID.

Make sure that the person ID entered is valid for the call report creation.

- Update action (ADD = Add; DEL = Delete; UPD = Update).

Note. In order to add, update, or delete a call report contact, the current user must have access to that call report (as defined by the dataset rule RD_CR_LIST_TXN).

You can specify these attributes as inputs when you add or update contacts: contact BO ID, contact role type ID, customer BO ID (make sure that the ID is valid), customer role type ID, and primary indicator (Y/N).

Note. Note that you can only have one primary contact in a call report. Therefore, if you specify a contact that you add or update as primary, the rest of the contacts in the same call report have their primary contact flag set to N.

At the end of the operation, the system returns three pieces of information in the response message: Call Report ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

- Update Call Report Note

This service operation is a synchronous process that takes these inputs to add, delete, or update call report notes:

- Call report ID.
- Note's Sequence number.

If you add a new note, the system assigns the next available sequence number to the new note and ignores the one that is supplied is ignored.

- Update action (ADD = Add; DEL = Delete; UPD = Update).

Note. In order to add, update, or delete a call report notes, the current user must have access to that call report (as defined by the call report dataset rule RD_CR_LIST_TXN). You can specify these attributes as inputs when you add or update notes: note summary, start date, end date, and description.

At the end of the operation, the system returns three pieces of information in the response message: Call Report ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

- Update Call Report Transaction

This service operation is a synchronous process that takes these inputs to add or delete call report transactions:

- Call report ID.
- Transaction type (transaction types are user defined, for example, COMPANY, LEAD, OPPRT, and PARTNER).
- Update action (ADD = Add; DEL = Delete).
- Transaction Market.
- Transaction SYNC ID.

This is the SYNC ID for the corresponding transaction type ID. Make sure that you enter a valid ID.

Note. In order to add or delete a call report transaction, the current user must have access to that call report (as defined by the call report dataset rule RD_CR_LIST_TXN).

In addition, you can specify a transaction as the primary one when you add or delete transactions. If you specify one transaction in the call report as primary (flag set to Y), the system sets this flag to N for other transactions in the call report as there can only be one primary transaction in a call report.

At the end of the operation, the system returns three pieces of information in the response message: Call Report ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

This table provides the technical names, operation type, and messages names of the service operations that are related to the Call Report web service:

Service Operation	Operation Type	Request Message	Response Message
Create Call Report(RD_CALL_REPORT_CREATE)	Synchronous	RD_CALL_REPORT_CREATE_REQ	RD_CALL_REPORT_CREATE_RES
Get Call Report (RD_CALL_REPORT_GET)	Synchronous	RD_CALL_REPORT_GET_REQ	RD_CALL_REPORT_GET_RES
Search Call Reports(RD_CALL_REPORT_SEARCH)	Synchronous	RD_CALL_REPORT_SEARCH_REQ	RD_CALL_REPORT_SEARCH_RES
Update Call Report Header(RD_CALL_REPORT_UPDATEHEADER)	Synchronous	RD_CALL_REPORT_UPD_HDR_REQ	RD_CALL_REPORT_RESULT_RES
Update Call Report Contact(RD_CALL_REPORT_UPDATECONTACT)	Synchronous	RD_CALL_REPORT_UPD_CNTCT_REQ	RD_CALL_REPORT_RESULT_RES
Update Call Report Note(RD_CALL_REPORT_UPDATENOTE)	Synchronous	RD_CALL_REPORT_UPD_NOTE_REQ	RD_CALL_REPORT_RESULT_RES
Update Call Report Transaction (RD_CALL_REPORT_UPDATETRANS)	Synchronous	RD_CALL_REPORT_UPD_TXN_REQ	RD_CALL_REPORT_RESULT_RES

Viewing Message Elements for Tasks and Call Reports

You can view the elements and fields that are included in each operation message for Task and Call Report web services through PeopleTools.

To view a list of field names and aliases for a particular message:

1. Select PeopleTools, Integration Broker, Integration Setup, Messages.
2. Enter *RB_TASK* in the Message Name field and click Search. The system lists all the messages that are related to the Task web service.

To view messages that are related to the Call Report web service, enter *RD_CALL_REPORT* in the Message Name field.

3. Select the message you want to view.

4. Click the message name link under the Parts grid.

The system opens the Message Definition page in a new browser.

5. Click the plus sign next to the table name at the bottom of the page to view the fields and aliases associated with the message.

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