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PeopleSoft CRM 9.1 Product and Item Management PeopleBook

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Oracle's PeopleSoft CRM Product and Item Management Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleSoft business object management.
- PeopleSoft automation and configuration tools.
- PeopleSoft 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 Application Fundamentals

The *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line.

The *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* contains these parts:

- CRM Multi-Product Foundation

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

- Workforce Management

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

- Interactions and 360 Degree Views

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

- Self-Service For Customers

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

- Relationship Management

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

- Entitlement Management

  This part discusses setting up agreements and warranties.

- SmartViews

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

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Oracle's PeopleSoft CRM Application Fundamentals Preface"

PeopleSoft Business Object Management

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

The *PeopleSoft 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 CRM 9.1 Business Object Management PeopleBook, "Oracle's PeopleSoft CRM Business Object Management Preface"

PeopleSoft Automation and Configuration Tools

The *PeopleSoft 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 9.1 Application Fundamentals PeopleBook.*

The *PeopleSoft 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 Business Process Execution Language (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 CRM 9.1 Automation and Configuration Tools PeopleBook, "Oracle's PeopleSoft CRM Automation and Configuration Tools Preface"

PeopleSoft Services Foundation

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

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

- Solution Management

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

- Transaction Billing Processor Integration

  PeopleSoft Transaction Billing Processor enables PeopleSoft Integrated FieldService, PeopleSoft Support, and PeopleSoft Order Capture to integrate with PeopleSoft Billing and PeopleSoft General Ledger through the use of the PeopleSoft Contracts architecture. The integration enables PeopleSoft CRM users to bill and book revenue for recurring, one-time, and on demand services.

- Solution Management

  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 activities through the Map Dashboard.

See Also

PeopleSoft CRM 9.1 Services Foundation PeopleBook, "Oracle's PeopleSoft CRM Services Foundation Preface"

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the PeopleTools 8.52 PeopleBooks.

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online 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 locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Part 1

Getting Started

Chapter 1
Getting Started with PeopleSoft CRM Product and Item Management

Chapter 1

Getting Started with PeopleSoft CRM Product and Item Management

This chapter provides an overview of PeopleSoft Customer Relationship Management (PeopleSoft CRM) and discusses product and item integrations and implementation.

PeopleSoft CRM Product and Item Management Overview

In PeopleSoft CRM, products are what you sell and support. Almost all customer-facing PeopleSoft CRM applications reference product data, including (but not limited to) PeopleSoft CRM: Field Service, Support and Help Desk, Sales, Order Capture, and Marketing. You can group and present product information in catalogs for use by the sales force or by self-service applications, plan sales and marketing campaigns around products, manage product portfolios, or identify the competencies required to service and support a product and use that to assign workers to service and support tasks.

This PeopleBook discusses setup tasks and data management for products and items in PeopleSoft CRM, including how to define and price product packages and standalone products.

PeopleSoft CRM Product and Item Integrations

PeopleSoft CRM integrates with PeopleSoft Supply Chain Management (SCM) and with other SCM, or order fulfillment, systems. PeopleSoft SCM systems use product definitions to manage products and product components throughout the manufacturing process. PeopleSoft CRM delivers several enterprise integration points (EIPs) that maintain data integrity between PeopleSoft CRM and third-party SCM systems by synchronizing product and item data.

Service Oriented Architecture (SOA) has emerged as a standard form of integration. To lower customer costs and provide interoperability, PeopleSoft has made certain transactions available through SOA. PeopleTools has converting existing Integration Broker messages to web services. These web services have specific PeopleSoft structures. Part of this feature includes the delivery of more generic web services that can be used with other CRM systems.

SOA provides web services for existing installed product functionality so that any business process can call the web service and leverage the features. To support business processes for installed products, PeopleSoft has built these web services and operations:

Operation	***Message Type***	***Description***
Search Installed Product	Synchronous	User specifies criteria and the system returns a list of installed products.
Get Installed Product	Synchronous	User specifies key data and the system returns the installed product's data.
Create Installed Product	Synchronous	User specifies data to be used in the creation of an installed product
Update Installed Product	Synchronous	User specifies data to be used in updating a product that is already installed.

See Also

Appendix A, "Product Delivered Web Services," page 227

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Understanding Business Process Management"

PeopleSoft CRM Product and Item Implementation

PeopleSoft Setup Manager enables you to review a list of setup tasks for your organization for the products that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, as well as the corresponding PeopleBook documentation.

You set up products and items as part of the implementation process for PeopleSoft CRM products such as PeopleSoft Integrated FieldService and PeopleSoft Order Capture.

This table lists all of the components that have component interfaces:

Component	***Component Interface***	***Reference***
Multilevel Component Types	RB_HLEV_MGMT	See and Chapter 3, "Setting Up Product Definitional Elements," Creating Product Definitional Elements, page 14.
Multilevel Structure Linkage	MLPB_STRUCT_MGMT	See and Chapter 3, "Setting Up Product Definitional Elements," Creating Product Definitional Elements, page 14.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook,* with information about where to find the most current version of each.

See Also

PeopleTools 8.52: PeopleSoft Setup Manager PeopleBook

PeopleTools 8.52: PeopleSoft Component Interfaces PeopleBook

Part 2

Product and Item Management

Chapter 2
Understanding Products and Items in PeopleSoft CRM

Chapter 3
Setting Up Product Definitional Elements

Chapter 4
Defining Items

Chapter 5
Working with Item Assemblies

Chapter 6
Checking Item Balances and Availability

Chapter 7
Setting Up Products

Chapter 8
Defining Options for Integration to the Asset Repository Module in PeopleSoft Financials

Chapter 9
Creating Catalogs

Chapter 10
Tracking Installed Products

Chapter 2

Understanding Products and Items in PeopleSoft CRM

This chapter discusses:

- Products.
- Items.
- The relationship between products and items.

Products

Products in PeopleSoft Customer Relationship Management (PeopleSoft CRM) are what you sell to customers. You might sell physical goods such as cars or refrigerators or intangible services (also known as service products) such as 3000-minute rate plans for wireless phones.

Product Definitions

PeopleSoft CRM represents products by product definitions. A product definition, keyed by product ID and setID, stores all of the product information that company representatives reference to sell or support products.

A product definition and its associated price setup provide the foundation for many features of PeopleSoft CRM, which include product ordering, catalogs, catalog searches, product advisor dialogs, dynamic product packages, and configured products that are accessed from applications such as PeopleSoft Order Capture, PeopleSoft Order Capture Self Service, PeopleSoft Sales, PeopleSoft Advanced Configurator, and so forth. You also use products in PeopleSoft Integrated FieldService, PeopleSoft Support, and PeopleSoft HelpDesk for on-site and off-site customer support processing.

Use the Product Definition component to define products. If you implement both PeopleSoft CRM and PeopleSoft Supply Chain Management (PeopleSoft SCM) or another third-party supply chain management system, you can use the Product enterprise integration point (EIP) to synchronize product data between the two systems.

Note. If you integrate between PeopleSoft CRM and a supply chain management system, you should define all product records in the PeopleSoft CRM system to take advantage of functionality, such as dynamic product packages and configured products, that are offered only in PeopleSoft CRM.

Types of Product Definitions

The types of product definitions in PeopleSoft CRM are:

- Engagement service

  Engagement services are services such as consulting that are priced by PeopleSoft Proposal Management. PeopleSoft CRM integrates with PeopleSoft Proposal Management to exchange quote, status, and pricing information.

  See and Chapter 7, "Setting Up Products," Integrations with PeopleSoft SCM and PeopleSoft Proposal Management, page 71.

- Service agreement

  Service agreements are agreements with a company to provide services, such as repair and maintenance, for a product or to provide a service such as satellite TV or lawn care that is purchased by a customer. Service agreements are priced through the service pricing engine, and do not use the product price or price rule features to retrieve a price. When you set up a service agreement product type, you first set up the agreement template that defines the service that is provided by the agreement.

  See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Managing Agreements and Warranties." and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Defining Pricing Information for Services and Support Offerings."

- Service product

  Service products, such as cellular phone service, are not physical items that are inventoried. The customer purchases the service and not a physical product.

- Standard product

  Standard, or standalone, products do not contain components. You can designate that a standalone product is a configured product by selecting the configuration option. When you define a product, you select whether it is standalone or contains components.

- Package product

  Product packages contain more than one component. A product package can include other packages and are priced either at the product level or as the sum of the package components. When you define a product package, you designate the pricing method.

  Package products can be configured. They can either be lightly configured packages or configured packages using the Advanced Configurator.

- Subscription product

  Subscription products allow you to record orders and quotes consisting of subscription based installment billing periods. This product type may or may not contain a product package.

- Commitment product

  See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Setting Up Multilevel Product Bundles," Commitment Products.

See Also

Chapter 3, "Setting Up Product Definitional Elements," page 13

Chapter 7, "Setting Up Products," page 69

Items

Items are tangible goods or materials that an organization keeps in stock for sale or use in the future. You use items to keep track of material stocks—goods that are located in physical storage locations such as warehouses, storerooms, or service trucks—in the inventory control system.

Item Definition

You define items either by using the Item Definition component or by using the Item Master EIP to integrate with an inventory or purchasing system.

Because the synchronization of item definitions is one-way from the inventory or purchasing system to the PeopleSoft CRM system, PeopleSoft suggests that you create and update item records in the inventory or purchasing system, then publish them to PeopleSoft CRM.

Note. If you integrate with an inventory or purchasing system, you are unable to update the item definition within PeopleSoft CRM.

See Also

Chapter 4, "Defining Items," page 33

PeopleSoft Integrated FieldService 9.1 PeopleBook, "Ordering and Receiving Materials"

The Relationship Between Products and Items

In PeopleSoft CRM, a product is associated with only one item (one-to-one relationship). For any physical product that you sell in-store, there is an item equivalent in the inventory system, which establishes the one-to-one relationship. You stock the item on the warehouse shelf and use it for fulfilling orders of that product.

More than one product can use the same item. This typically happens when you position or price the same item differently for different product lines.

A product is not required to have an associated item. For example, a 3000-minute rate plan for wireless phones does not have a physical equivalent on a storage shelf and, therefore, is not associated with any item in the inventory system.

Items are associated with products for fulfillment and servicing purposes in PeopleSoft CRM.

See *PeopleSoft Managing Items 9.1 PeopleBook*

See *PeopleSoft Order Management 9.1 PeopleBook*

See and Chapter 10, "Tracking Installed Products," Defining Creation and Update Rules for Installed Products, page 166.

Items in PeopleSoft Integrated FieldService

In PeopleSoft CRM, products are used in the Installed Product and Services component and are required. Items are an option in the Installed Product and Services component. The Installed Assets component is for internal assets that are used in PeopleSoft HelpDesk.

Service technicians order items that they need to perform service using the Order Materials component, either as an interunit transfer or purchase order. After the purchasing or inventory system processes the order and ships an item to the technician's truck, the technician installs the item and uses the Time Material Expense page within the Service Order component to report the receipt and usage of the new item, as well as the removal of the old one.

You can set up rules to govern when the system creates or changes the status of installed products.

For example, the system creates an installed product or changes its status when:

- A product is ordered through PeopleSoft Order Capture.
- An automatic shipping notification (ASN) for the product is received from a fulfillment system.
- A material usage or removal is recorded in PeopleSoft Integrated FieldService.

When these activities occur, the PeopleSoft CRM system passes product information along with the inventory system serial number (if applicable) to the installed product.

For example, an electrical appliance retailer might keep stock in a warehouse. The inventory system associates each product with an item on the warehouse shelf. When a customer places a product order and the order comes through the fulfillment system, the associated item of the product is picked from the warehouse and shipped.

The serial number is sent as part of the ASN message, which triggers either the creation of an installed product for the shipped product or an update of the existing installed product for that product.

Chapter 3

Setting Up Product Definitional Elements

This chapter provides an overview of product definitional elements and discusses how to create them.

Understanding Product Definitional Elements

Definitional elements describe products in the PeopleSoft Customer Relationship Management (PeopleSoft CRM) system. You must set up these definitional elements before defining products in PeopleSoft CRM:

- Product installation options.
- Rules for generating product ID numbers.
- Rule sets for creating and updating installed products.
- Product groups.

  Product groups enable you to share processing parameters between products. PeopleSoft CRM delivers a set of basic product groups.
- Product categories.

  Product categories are used to group products in catalogs.
- Product brands.
- Competitor codes.

  Competitor codes enable you to keep track of competitors' similar products.
- Branch scripts.

  Branch scripts predefine sales dialogue with customers, provide direction to customer service representatives, and guide internal processes and operations.
- Region IDs.

  Region IDs enable selling by region.
- Competency codes.

  Competency codes define the skills required to support the product.
- Relationship IDs.

  Relationship IDs define the relationship of one product to another. For example, one product might either complement or substitute for another product.

- Product attributes.

  Product attributes describe characteristics of the product, such as height, weight, color, and so forth.

- Subscription terms.

  Subscription terms define the length of time for which the subscription is valid.

- Multilevel component structure (multilevel component types and sub-levels).

  Multilevel component types define various levels that are available within a multilevel component structure and its properties.

- Multilevel structure linkage.

  Multilevel structure linkage associates each setID that supports multilevel product bundles with a multilevel component structure.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up General Options," Setting Up Automatic Numbering

Chapter 4, "Defining Items," page 33

Chapter 10, "Tracking Installed Products," page 137

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Managing Workforce Competencies"

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up General Options," Setting Up Regions

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Configuring Attributes"

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Defining Scripts"

Creating Product Definitional Elements

To create product definitional elements, use the Product Installation (PROD_INSTALLATION), Automatic Numbering (AUTO_NUM_PNL), Product Group (PROD_GROUP_TBL), Product Category (PROD_CATEGORY), Product Brand (PROD_BRAND), Competitors (COMPETITOR_CD), Region (RB_REGION), Attribute Definition (RB_ATTRIBUTE), Auto Numbering (AUTO_NUM_PNL), Multilevel Component Types (RB_HLEV_MGMT), and Multilevel Structure Linkage (MLPB_STRUCT_MGMT) components.

This section discusses how to:

- Select options for managing products.
- Specify installed product rules.
- Define product automatic numbering options.
- Define product group codes.

- Viewing products that are linked to the product group.
- Define product categories.
- Define product brands.
- Enter competitor information.
- Define branch scripts.
- Set up product relationship codes.
- Define product attributes.
- Set up subscription terms.
- Set up multilevel component types.
- Specify sublevels for multilevel component types.
- Set up multilevel structure linkages.

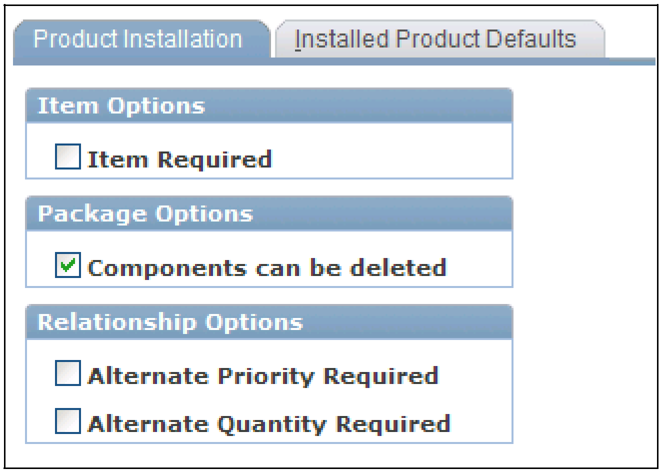
Pages Used to Set Up Product Definitional Elements

Page Name	***Definition Name***	***Navigation***	***Usage***
Product Installation	PROD_INSTALLATION	Set Up CRM, Install, Product Options, Product Installation	Select options for managing products.
Installed Product Defaults	RF_INSTPRD_DFLT	Set Up CRM, Install, Product Options, Installed Product Defaults	Specify rules that determine how system transactions create and update installed products.
Setup Auto Numbers	AUTO_NUM_PNL	Set Up CRM, Common Definitions, Codes and Auto Numbering, Automatic Numbering, Auto Numbering	Define automatic numbering options for product IDs.
Product Group	PROD_GROUP_TBL	Products CRM, Product Groups, Product Group	Define product group codes.
Linked Products	PROD_GRP_OVERVIEW	Products CRM, Product Groups, Linked Products	View products that belong to a product group.
Product Category	PROD_CATEGORY	Products CRM, Product Category, Product Category	Define product category codes.
Product Brand	PROD_BRAND	Products CRM, Product Brand, Product Brand	Define product brand codes.

Page Name	***Definition Name***	***Navigation***	***Usage***
Competitors	COMPETITOR_CD	Products CRM, Competitors, Competitors	Define competitor codes.
Script	RC_BS_MAIN	Set Up CRM, Common Definitions, Process Automation, Script, Script	Define a branch script for support and sales personnel.
Region	RB_REGION	Set Up CRM, Common Definitions, Location, Region Codes, Region	Set up regions.
Competencies	COMPETENCY_TABLE	Set Up CRM, Common Definitions, Competencies, Competencies	Establish competency codes.
Product Relations Codes	RB_RELATIONS	Products CRM, Product Relations Codes, Product Relations Codes	Set up the codes that describe relationships between products.
Attribute Definition	RB_ATTRIBUTE_MAIN	Set Up CRM, Common Definitions, Attributes, Attribute Definition, Attribute Definition	Define a product attribute.
Subscription Terms	PROD_SUBSCRIPT	Products CRM, Subscription Terms, Subscription Terms	Define a length of time the subscription is valid.
Multilevel Component Types	RB_HLEV_DFN	Set Up CRM, Common Definitions, Multilevel Component Types, Multilevel Component Types	Define multilevel components types allowed within a bundle structure and its properties.
Sub-Levels	RB_HLEV_DESCENDANT	Set Up CRM, Common Definitions, Multilevel Component Types, Sub-Levels	Define the commercial component hierarchy for each defined multilevel component type.
Multilevel Structure Linkage	MLPB_STRUCT_MGMT	Products CRM, Multilevel Structure Linkage, Multilevel Structure Linkage	Assign the multilevel structure to any given setID that supports multilevel product bundles.

Selecting Options for Managing Products

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



Product Installation page

Item Required

Select if you have installed PeopleSoft Supply Chain Management (PeopleSoft SCM) or PeopleSoft Integrated FieldService. You can deselect this check box if the order fulfillment system does not require items or if products are not inventoried.

If you select this check box, you must use the Item Definition component to define product IDs, descriptions, and standard units of measure. You then complete the product definition in the Product Definition component.

Components can be deleted

Select to enable deletion of components in a product package.

Alternate Priority Required and **Alternate Quantity Required**

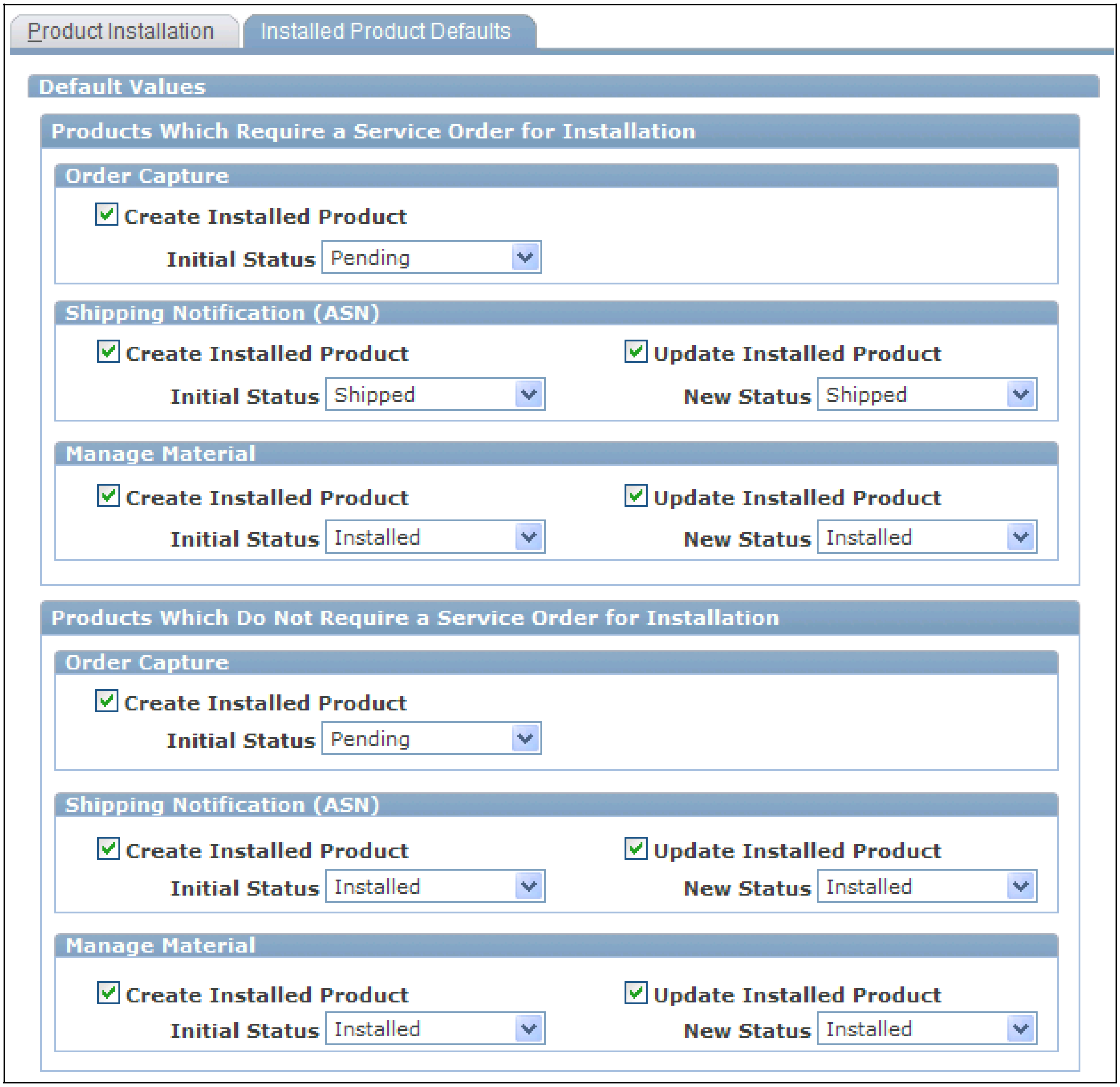
Select to enter a priority and quantity on the Product Relationships page for an alternate relationship type. Select these check boxes when the PeopleSoft CRM system is integrated with PeopleSoft SCM.

See Also

Chapter 4, "Defining Items," page 33

Specifying Installed Product Rules

Access the Installed Product Defaults page (Set Up CRM, Install, Product Options, Installed Product Defaults).

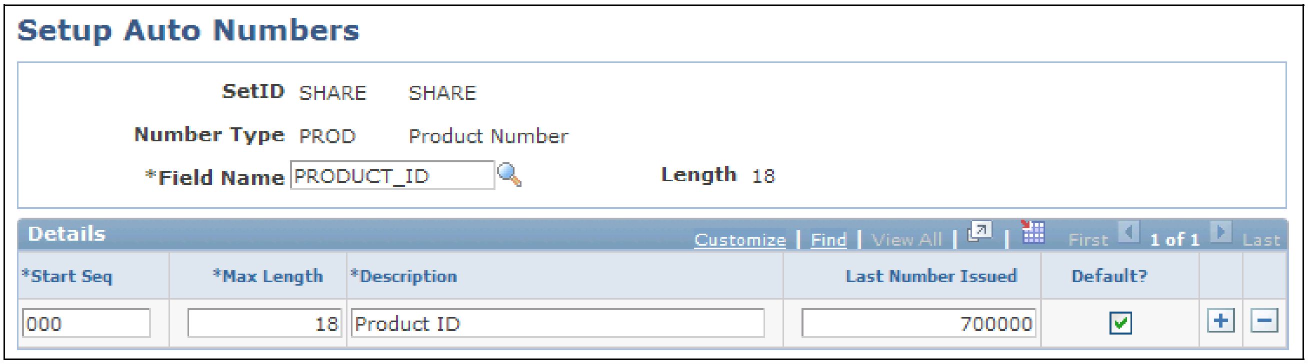


Installed Product Defaults page

See and Chapter 10, "Tracking Installed Products," page 137.

Defining Product Automatic Numbering Options

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

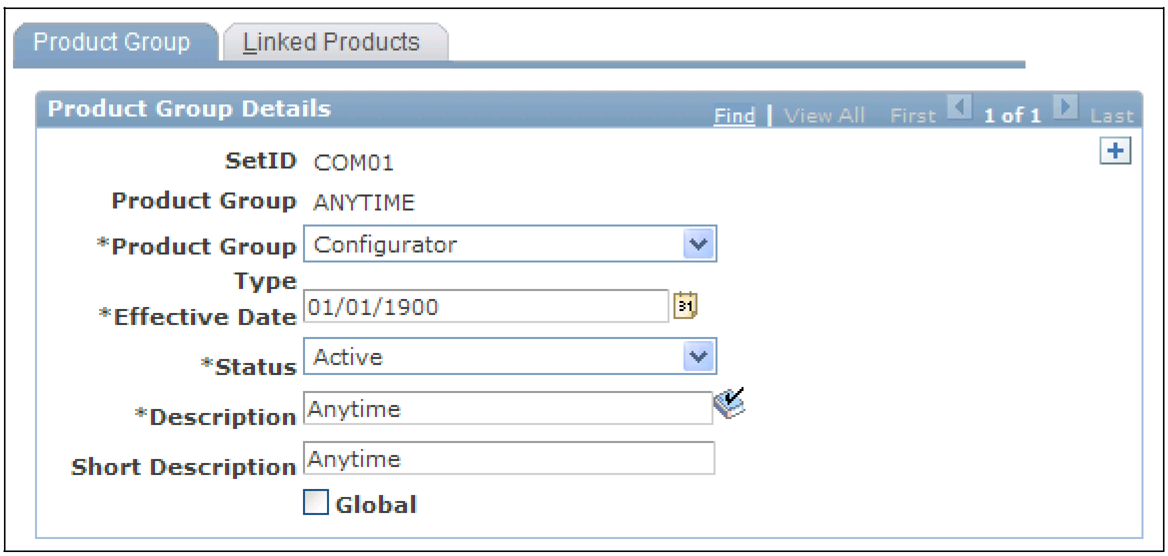


Setup Auto Numbers page

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up General Options," Setting Up Automatic Numbering.

Defining Product Group Codes

Access the Product Group page (Products CRM, Product Groups, Product Group).



Product Group page

Note. You cannot delete a product group from this page. If you integrate your PeopleSoft CRM applications with your PeopleSoft SCM applications, the system would also delete the product from your SCM database. This happens because SCM subscribes to a message that the CRM database publishes. If the system allowed you to delete the product group from this page, it could cause problems in your SCM operating environment. As such, this design is intentional.

Product Group Type Select the product group type from these available values:

- *Accounting*
- *Buying Agreement*
- *Configurator*
- *Customer Target*
- *Forecast*
- *Freight*
- *General*
- *Literature*
- *Organization*
- *Pricing*
- *Product Catalogs*
- *Product Line*
- *Reporting*
- *Reporting Externally*
- *Reporting Internally*
- *Self-Service Products*
- *Tax*
- *Transportations*
- *VAT*

Global Select to include all products in the product group.

Note. This selection is not used for product groupings in the catalog.

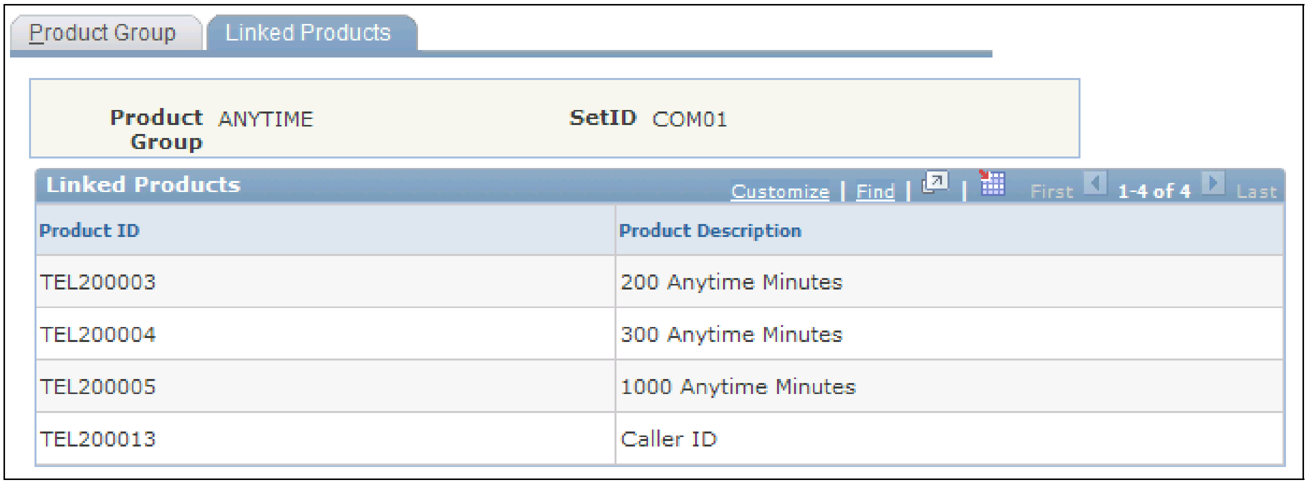
See and Chapter 9, "Creating Catalogs," Understanding Catalogs, page 105.

See Also

Chapter 7, "Setting Up Products," Adding Products to Product Groups, page 87

Viewing Products That Are Linked to the Product Group

Access the Linked Products page (Products CRM, Product Groups, Linked Products).

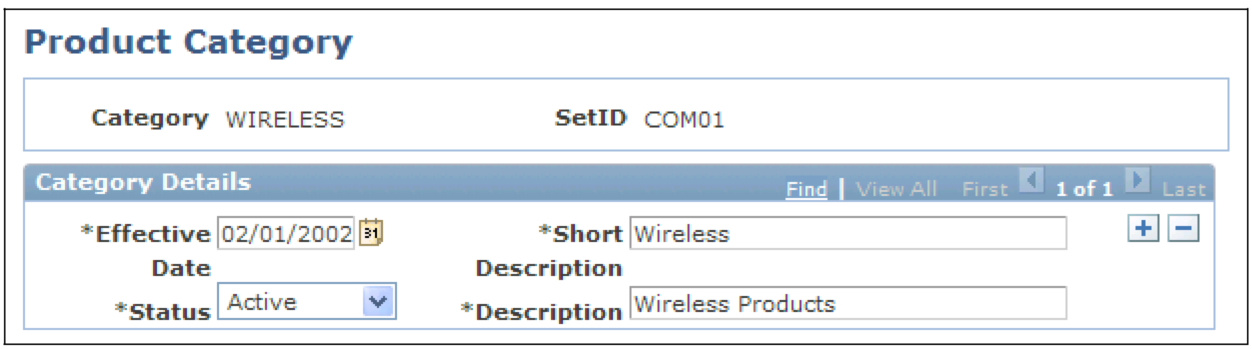


Linked Products page

This page displays the active products that are included in the product group.

Defining Product Categories

Access the Product Category page (Products CRM, Product Category, Product Category).

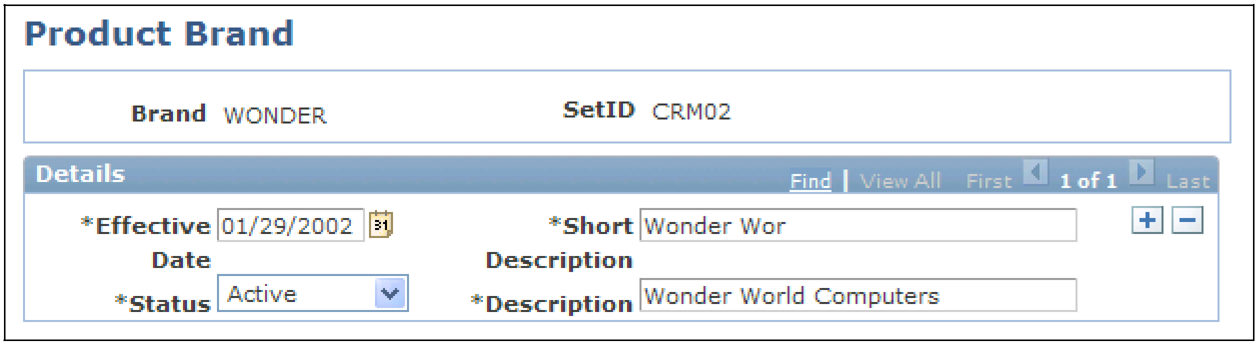


Product Category page

Use this page to define product category codes. Enter the date the product category will be effective, short and long descriptions, as well as the status; either *Active* or *Inactive*.

Defining Product Brands

Access the Product Brand page (Products CRM, Product Brand, Product Brand).

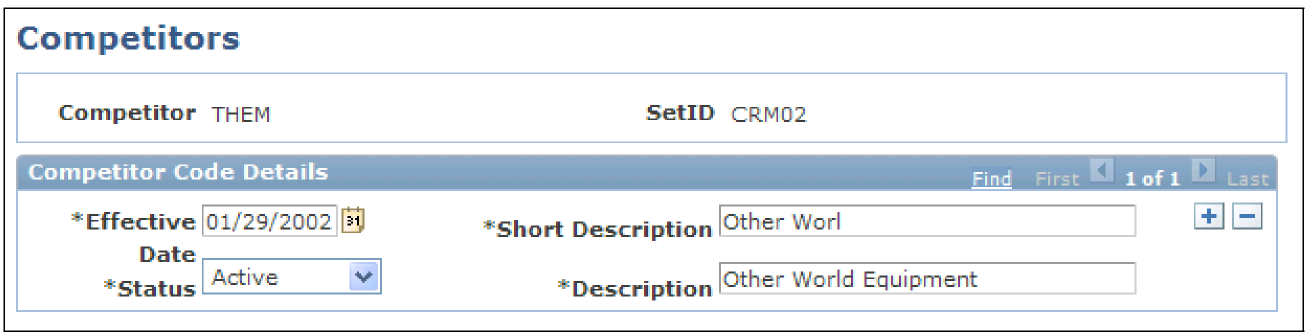


Product Brand page

Use this page to define product brands. Enter the date the product brand will be effective, short and long descriptions, as well as the status; either *Active* or *Inactive.*

Entering Competitor Information

Access the Competitors page (Products CRM, Competitors, Competitors).

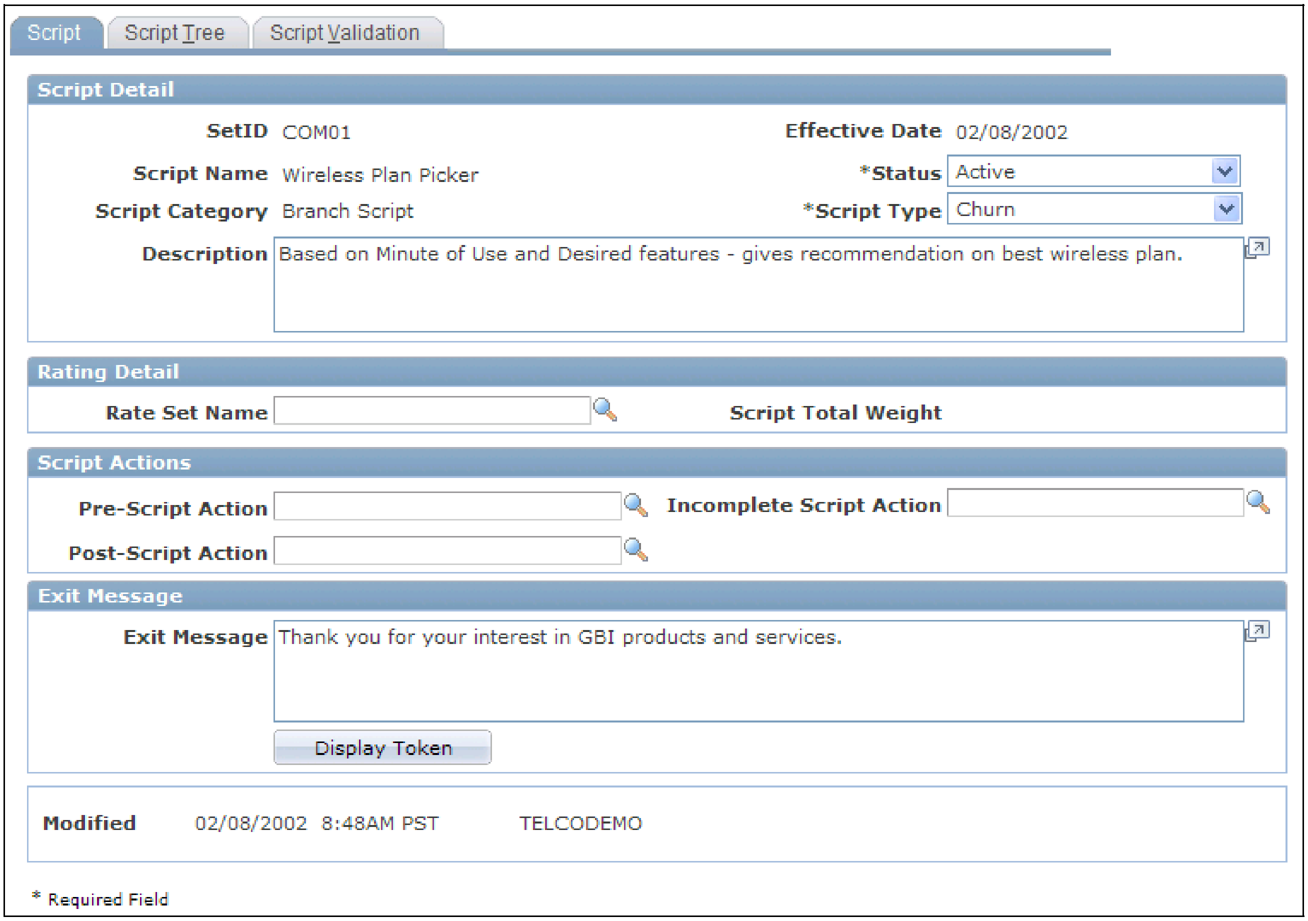


Competitors page

Enter competitor information on this page. Enter the date the competitor will be effective, short and long descriptions, as well as the status; either *Active* or *Inactive.*.

Defining Branch Scripts

Access the Script page (Set Up CRM, Common Definitions, Process Automation, Script, Script).

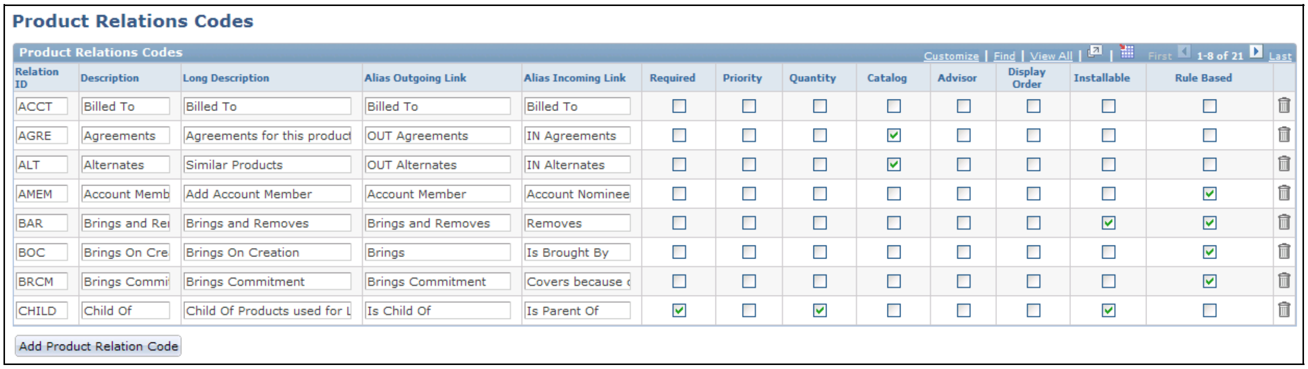


Script page

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Defining Scripts."

Setting Up Product Relationship Codes

Access the Product Relations Codes page (Products CRM, Product Relations Codes, Product Relations Codes).



Product Relations Codes

Product Relations Codes Customize | Find | View All | First 1-8 of 21 Last

Relation ID	Description	Long Description	Alias Outgoing Link	Alias Incoming Link	Required	Priority	Quantity	Catalog	Advisor	Display Order	Installable	Rule Based
ACCT	Billed To	Billed To	Billed To	Billed To	☐	☐	☐	☐	☐	☐	☐	☐
AGRE	Agreements	Agreements for this product	OUT Agreements	IN Agreements	☐	☐	☐	☑	☐	☐	☐	☐
ALT	Alternates	Similar Products	OUT Alternates	IN Alternates	☐	☐	☐	☑	☐	☐	☐	☐
AMEM	Account Memb	Add Account Member	Account Member	Account Nominee	☐	☐	☐	☐	☐	☐	☐	☑
BAR	Brings and Re	Brings and Removes	Brings and Removes	Removes	☐	☐	☐	☐	☐	☐	☑	☑
BOC	Brings On Cre	Brings On Creation	Brings	Is Brought By	☐	☐	☐	☐	☐	☐	☐	☑
BRCM	Brings Commi	Brings Commitment	Brings Commitment	Covers because	☐	☐	☐	☐	☐	☐	☐	☑
CHILD	Child Of	Child Of Products used for L	Is Child Of	Is Parent Of	☑	☐	☑	☐	☐	☐	☑	☐

Add Product Relation Code

Product Relations Codes page

The Product Relations Codes page lists the possible relationships among products of all types that are supported in the product definition model. The options that you select for a relationship type determine the options that are available on the Product Relationships page when you define a product.

Warning! Do not modify the predefined setup in the Product Relations Codes component for multilevel product bundles, as Advanced Configurator is set up to support the delivered code setup only.

Alias Outgoing Link and **Alias Incoming Link**

Enter the descriptions of the corresponding code, which are used in installed products, orders, and service management orders, to display relationships between two product entities. Because product relationships are bi-directional, different descriptions are used depending on the standpoint from which the relationship is being viewed, the source product's or the target product's.

For example, product A and product B have a *Child Of* relationship (A is the child of B) and they are both added to an order. If you view product A on the Line Details page of the order, the Line Relationship section shows the relation product A has with product B as *Is Child Of* because in this child of relationship, product A is the source and product B the target of the relationship. Therefore, the system uses the outgoing description to represent the relationship, which is being looked at from the standpoint of the source product. If you view the relationship from the target's (product B) position, the incoming link description appears instead.

Required

Select to include the Required check box on the Product Relationships page. The Required check box enables you to require that the related product is present whenever the listed product appears.

Priority

Select to include the Priority check box on the Product Relationships page. The Priority check box enables you to specify a priority among alternative related products.

Quantity

Select to include the Quantity field on the Product Relationships page. The Quantity field enables you to specify how many times the given relationship can occur.

Catalog	Select to include the Catalog check box on the Product Relationships page. The Catalog check box controls whether related products appear in the catalog along with the main product.
Advisor	Select to enable the use of the PeopleSoft Real-Time Advisor for up-sell and cross-sell opportunities.
Installable	Select for the system to create links in the installed base (called installed links) for the corresponding product relation after the order fulfillment process for products with that product relation completes. See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Setting Up Multilevel Product Bundles."
Rule Based	Select for the system to establish the corresponding product relation between products only at runtime, through the execution of validation and configuration rules during configuration sessions in ordering or service management processes. See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Setting Up Multilevel Product Bundles."

Note. The product relations codes that appear in the preceding example are delivered as system data. You can add relations, but you should not remove any delivered relations.

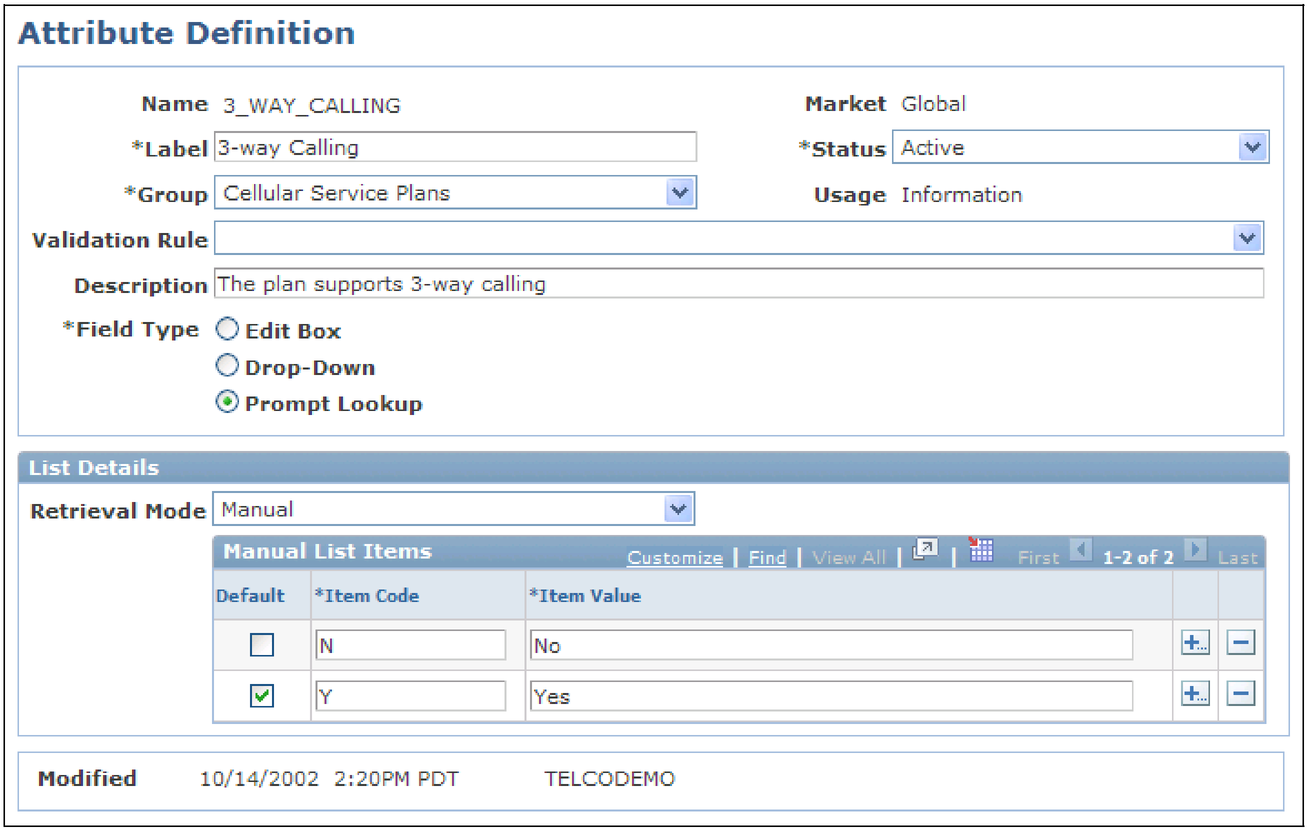
See Also

Chapter 7, "Setting Up Products," Managing Product Relationships, page 98

PeopleSoft Real-Time Advisor 9.1 PeopleBook

Defining Product Attributes

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



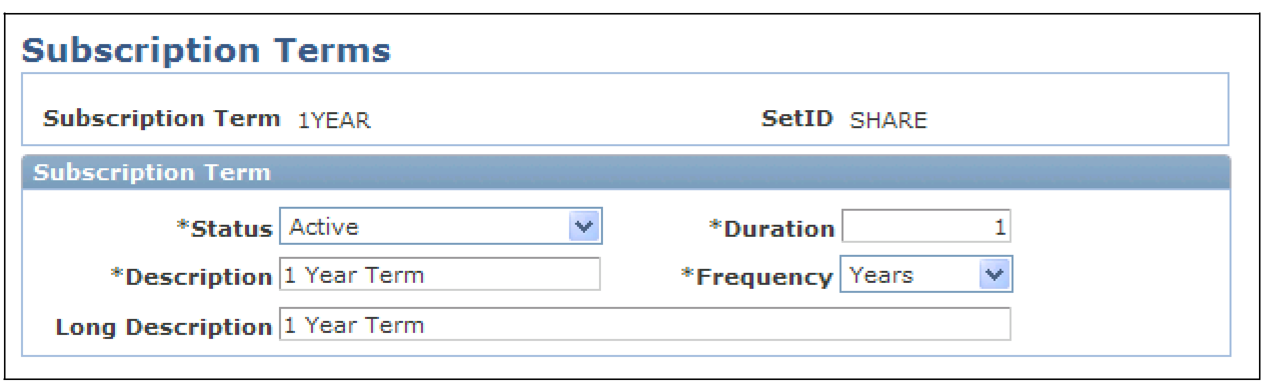
Attribute Definition page

Warning! Although product attributes provide flexibility for modeling products, attributes can adversely affect runtime performance. We suggest that you not use more than a few attributes per product.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Attributes."

Setting Up Subscription Terms

Access the Subscription Terms page (Products CRM, Subscription Terms, Subscription Terms).

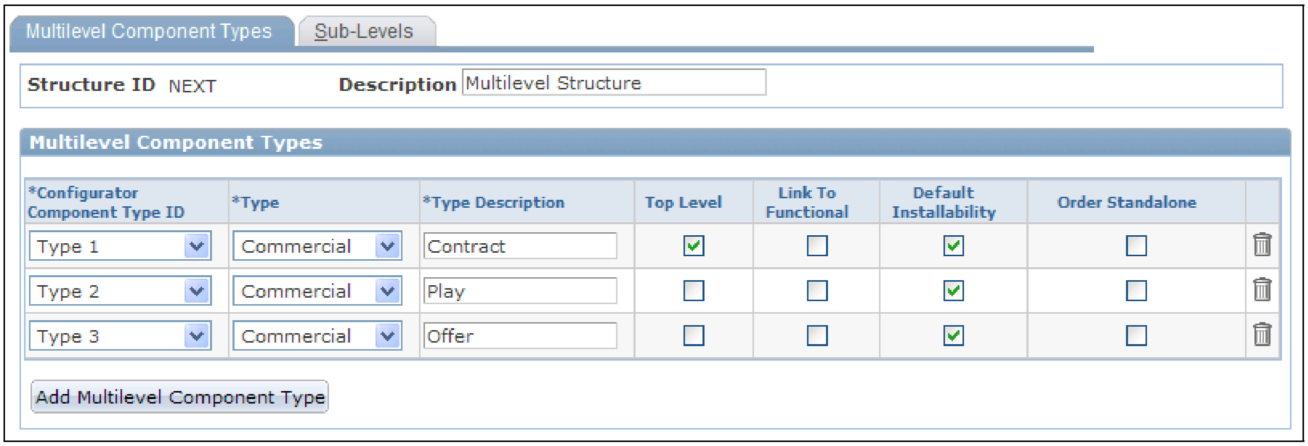


Subscription Terms page

Enter information in the available fields to define the subscription and the length of time the subscription is valid.

Setting Up Multilevel Component Types

Access the Multilevel Component Types page (Set Up CRM, Common Definitions, Multilevel Component Types, Multilevel Component Types).



Multilevel Component Types page

A multilevel structure definition contains a list of available component types it supports and their properties. Each setID can only be associated with one multilevel structure, and that structure will be used by product definitions within the same setID to model multilevel product bundles.

Warning! Do not modify the predefined setup in the Multilevel Component Type component (with the exception of the component type description), as Advanced Configurator is set up to support the delivered multilevel product structure only. If updates are made to the current setup, customization to the controller application of Advanced Configurator will be required to support the new configuration.

Configurator Component Type ID and **Type Description**

Displays the component type ID that the PeopleSoft Advanced Configurator uses to identify each component type. The Type Description field lists the name of the component type. The system delivers five component types, which are:

- Type 1 (Contract), which represents the top-level commercial component.
- Type 2 (Play), which represents the second-level commercial components.
- Type 3 (Offer), which represents the third to N-level commercial components.
- Type 4 (Atomic Offer), which represents the lowest level commercial components that links to functional components. Unlike other commercial components, this one cannot have descendents.
- Type 5 (Functional Component), which represents functional components.

Type

Displays whether the corresponding component type is *functional*, *commercial* or *external* (external service).

View this see reference for definitions on commercial component, functional component and external service.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Understanding Multilevel Product Bundles," Common Terms Used in This Part.

Top Level

Select to indicate that the corresponding component type is a top-level component of multilevel product bundles that are created.

A component type must be a commercial component to be set as top-level; it cannot be set as a descendent or sublevel of any other component types. The system allow only one top-level component type for each multilevel product bundle structure.

The Top Level and Link to Functional options are mutually exclusive and cannot be selected for a component type at the same time.

Link to Functional

Select to enable products of the corresponding commercial component type to be related to functional components through the *Sells* product relationship. Note that commercial component types that have this option enabled cannot be parents of other component types. In other words, these commercial component types represent the smallest unit of saleable components in multilevel product bundles. As delivered, atomic offer is the only component type that can be linked to functional components.

The capability to distinguish between commercial components and functional components allows for clear separation of commercial aspects of the offer and technical details of underlying products and services. Communication providers will be able to define different commercial conditions (for example, bundling, selling periods, and so on) or change them in time while maintaining just one single definition of the functional product or service.

Note. This option does not apply to functional component types.

Installability Default

Select to make products of the corresponding component type installable.

If selected, the Track as Installed Product field of the Product Definition - Installed Product page for product definitions of this component type appears as selected by default.

Order Standalone

Select if the products that are associated with the corresponding type can be ordered in a standalone manner.

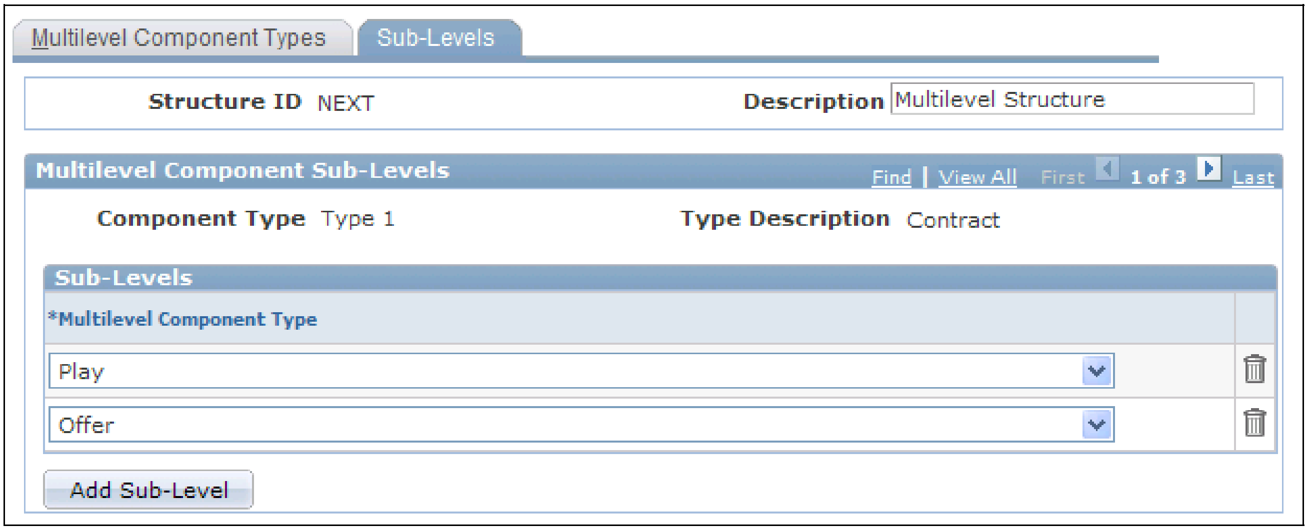
If cleared, the system hides the Order Standalone By section in the Product Definition component for products of the corresponding component type.

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Setting Up Multilevel Product Bundles," Setting Up Product Components

Specifying Sublevels for Multilevel Component Types

Access the Sub-Levels page (Set Up CRM, Common Definitions, Multilevel Component Types, Sub-Levels).



Sub-Levels page

Warning! Do not modify the predefined setup in Multilevel Component Type component, as Advanced Configurator is set up to support the delivered multilevel product structure only. If updates are made to the current setup, customization to the controller application of Advanced Configurator will be required to support the new configuration.

Use this page to specify sublevels (descendents) that each component type can support in a multilevel product structure. Only commercial component types that are not set to link to functional components are available for setup.

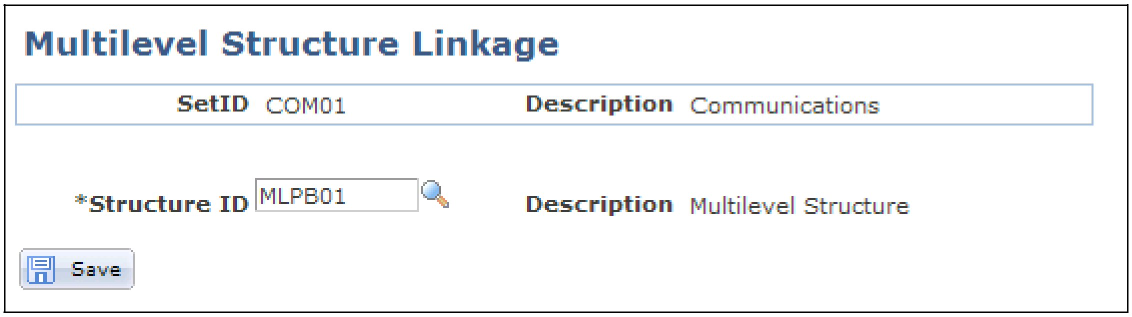
Multilevel Component Type

Select a component type to be a possible descendent of the parent component type. Values in this drop-down field do not include top-level component types or functional component types.

A component type can be specified as its own sublevel. For example, an offer can have other offers as its descendents in a multilevel product bundle.

Setting Up Multilevel Structure Linkages

Access the Multilevel Structure Linkage page (Products CRM, Multilevel Structure Linkage, Multilevel Structure Linkage).



Multilevel Structure Linkage page

Use this page to assign a multilevel structure to each setID that supports the ordering and service management of multilevel product bundles. The system delivers the multilevel structure for the *COM01* setID.

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Setting Up Multilevel Product Bundles," Setting Up Product Components

Chapter 4

Defining Items

This chapter provides an overview of item definition in PeopleSoft Customer Relationship Management (PeopleSoft CRM) and discusses how to:

- Define item control values.
- Define and maintain items.
- Associate items with additional units of measure (UOMs).

Understanding Item Definition in PeopleSoft CRM

An item must be available in PeopleSoft CRM system tables before you can reference it on an installed product, define material requirements for a service, use it to complete work on a service order, or create a return material authorization (RMA) enabling a customer to return it.

To define items, use the Item Definition component or use the Item Master enterprise integration point (EIP) to synchronize PeopleSoft CRM item definition records with item records that you defined in the inventory and purchasing system.

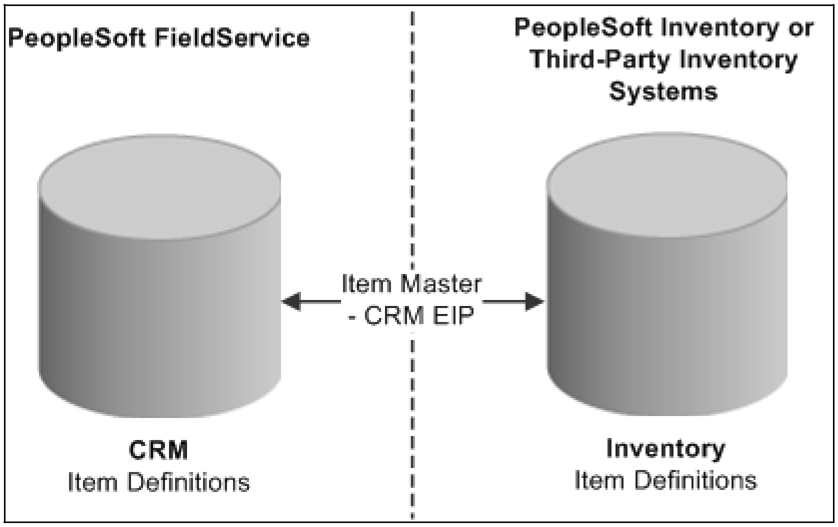
Important! To process material management transactions that take place in PeopleSoft CRM and the inventory and purchasing system, the definition of the item on the transaction must be identical in both systems. If you do not use the Item Master EIP to keep item information synchronized, you must manually duplicate changes or additions to item records in both systems.

The Item Master EIP includes three publishing application messages:

- ITEM_CRM_FULLSYNC_EFF
- ITEM_CRM_SYNC_EFF
- ITEM_CRM_SYNC

At initial implementation, the inventory and purchasing system publishes a full set of item records to the PeopleSoft CRM system using the ITEM_CRM_FULLSYNC_EFF application message. When you add or modify item definitions in the inventory and purchasing system after the initial synchronization, each is published to PeopleSoft CRM using the ITEM_CRM_SYNC and ITEM_CRM_SYNC_EFF application messages. PeopleSoft CRM is a subscriber to, not a publisher of, these messages. Any changes that you make to item definitions in PeopleSoft CRM are not published or synchronized with the inventory and purchasing system.

When the messages of the Item Master EIP are activated, you cannot use the Item Definition component in PeopleSoft CRM to change or add item records. Most updates are made to the item records in the inventory and purchasing system and publish them to PeopleSoft CRM, excluding the Configuration Option section and the Short Description field, as shown in this diagram:



Data flow from inventory and purchasing system to PeopleSoft CRM

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Oracle's PeopleSoft CRM Application Fundamentals Preface"

Item Status

This table lists the statuses that items can have in PeopleSoft CRM:

Status	***Description***
Under Initialization	The item definition has not been completed. No transactions are permitted, and the system does not list the item in any prompts. **Note.** PeopleSoft Inventory and Purchasing do not publish item definition records for items with an *Under Initialization* status. Only items defined in PeopleSoft CRM using the Item Definition component can have this status.
Pending Approval	The item definition has been completed and is awaiting approval. No transactions are permitted, and the system does not list the item in any prompts. Pending approval items are not sent from inventory until approval occurs.

Status	Description
Denied Approval	The item definition has been denied. No transactions are permitted, and the system does not list the item in any prompts. **Note.** In PeopleSoft CRM, item definition approval processing is a manual business process. PeopleSoft Inventory and Purchasing do not publish item definition records for items with *Pending Approval* or *Denied Approval* status. Only items that are defined in PeopleSoft CRM using the Item Definition component can have these status values.
Active	The item definition is active in the system. Items with an *Active* status are eligible for all item transactions in PeopleSoft CRM.
Hold	The item definition is on hold in the system.
Inactive	The item is no longer active in the system.
Discontinue	Usage of the item is being phased out. **Note.** In PeopleSoft CRM, you can receive and report usage and removal for an item with a *Hold,Inactive,* or *Discontinue* status using the Order Materials and Service Order components in PeopleSoft Integrated FieldService. You can also create an RMA for customers that are returning the item using the RMA Form (return material authorization form) component in PeopleSoft Support. However, you cannot enter a request to order any quantity of the item using the Order Materials component, nor can you create replacement orders for the item using the RMA Form component.

See Also

PeopleSoft Integrated FieldService 9.1 PeopleBook, "Ordering and Receiving Materials"

PeopleSoft CRM 9.1 Call Center Applications PeopleBook, "Managing Material Returns," Understanding Material Return Processing

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Oracle's PeopleSoft CRM Application Fundamentals Preface"

Defining Item Control Values

To define item control values, use the Item Number Control (INV_ITEM_CONTROL), (Item Groups (INV_ITEM_GROUP), Item Families (INV_PROD_FAMILIES), and Stock Types (INV_STOCK_TYPE) components.

This section discusses how to:

- Specify item numbering.
- Define item groups.
- Define item families.
- Define stock types.

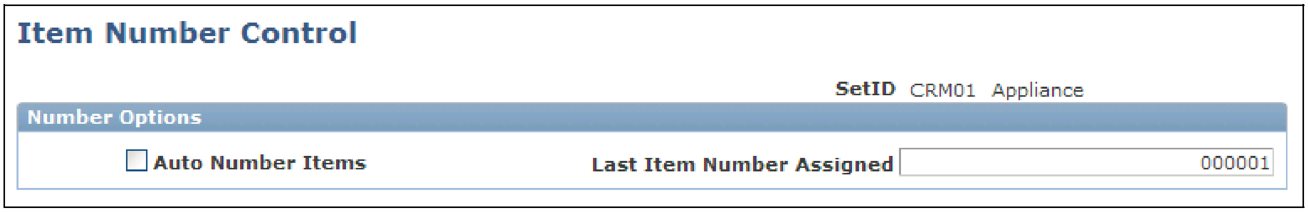
Note. Item control values in PeopleSoft CRM are used only if you synchronize them with PeopleSoft Supply Chain Management (PeopleSoft SCM) applications, including PeopleSoft Inventory and Purchasing. If you synchronize item records with another system, the Item Master EIP application messages do not update any control value information that is documented in this section.

Pages Used to Define Item Control Values

Page Name	***Definition Name***	***Navigation***	***Usage***
Item Number Control	ITEM_NBR_CONTROL	Items CRM, Item Number Control, Item Number Control	Define whether new items are numbered sequentially or manually.
Item Group	INV_ITEM_GROUP	Items CRM, Item Groups, Item Group	Define groups to categorize items. You can use item group as an alternate search key for Item ID.
Item Family	PROD_FAMILY_INV	Items CRM, Item Families, Item Family	Define families to which items can be assigned during the item definition process. You can use item family as an alternate search key for the item ID.
Stock Type	INV_STOCK_TYPE	Items CRM, Stock Types, Stock Type	Create ownership information codes for inventory items that are leased or consigned. You must specify stock types for any non-owned items that you define on the Item Definition page.

Specifying Item Numbering

Access the Item Number Control page (Items CRM, Item Number Control, Item Number Control).



Item Number Control page

Note. The item number controls that you define on this page are used for PeopleSoft CRM purposes only. If you synchronize item records with another system, the Item Master EIP application messages do not update item number control information.

Auto Number Items

Select to enable automatic numbering. When automatic numbering is enabled, you can accept the system-generated *NEXT* value as the ID for each item that you define. Even if automatic numbering is enabled, you can override the *NEXT* value by entering item IDs manually.

Note. If you do not select this check box, you must enter IDs manually when defining new items on the Item Definition page.

Last Item Number Assigned

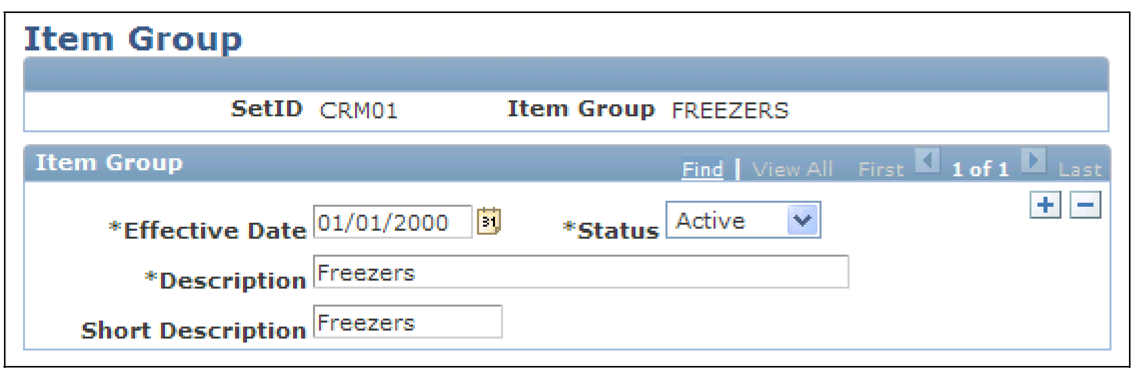
Enter the start of the numbering sequence that the system uses to generate unique item IDs automatically. When you select *NEXT* as the item ID during the item definition process, the system assigns the next sequential number in this numbering sequence as the item ID.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up General Options," Setting Up Automatic Numbering

Defining Item Groups

Access the Item Group page (Items CRM, Item Groups, Item Group).



Item Group page

Use this page to define groups that categorize items in PeopleSoft CRM. The concept of item groups originates from PeopleSoft Inventory. It is used on the Item Definition page for information purposes.

For more information about item groups, refer to the *PeopleSoft Managing Items 9.1 PeopleBook* for defining item control values.

VAT Defaults

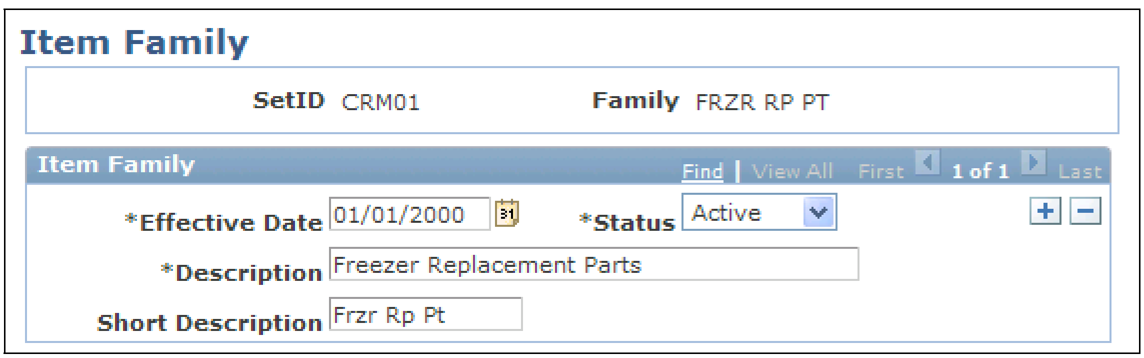
Click to access the VAT Defaults Setup page, which is a common page used to set up value-added tax (VAT) defaulting for all PeopleSoft applications that process VAT transactions. On this page, you can define VAT defaults for bill sources, per VAT registration country and state. Clicking this link transfers you to PeopleSoft Financials, where your must set up your VAT billing.

Service VAT Treatment Defaults

Click to access the Service VAT Treatment Drivers Setup page, which is a common page used to set up VAT services treatment for all PeopleSoft applications that process VAT transactions. If you are required to implement special handling for services, you can specify VAT service treatment defaults for bill sources on this page for a supplier's (seller's) location country and state. VAT defaults are also used when integrating with PeopleSoft Transaction Billing Processor. Clicking this link transfers you to PeopleSoft Financials, where your must set up your VAT billing.

Defining Item Families

Access the Item Family page (Items CRM, Item Families, Item Family).



Item Family page

Use this page to define families with which items can be associated, besides item groups, during the item definition process in PeopleSoft CRM. Item families are the same as item groups. They are used on the Item Definition page for information purposes. No formal relationship is established between item families and groups, but you can further categorize groups by using families.

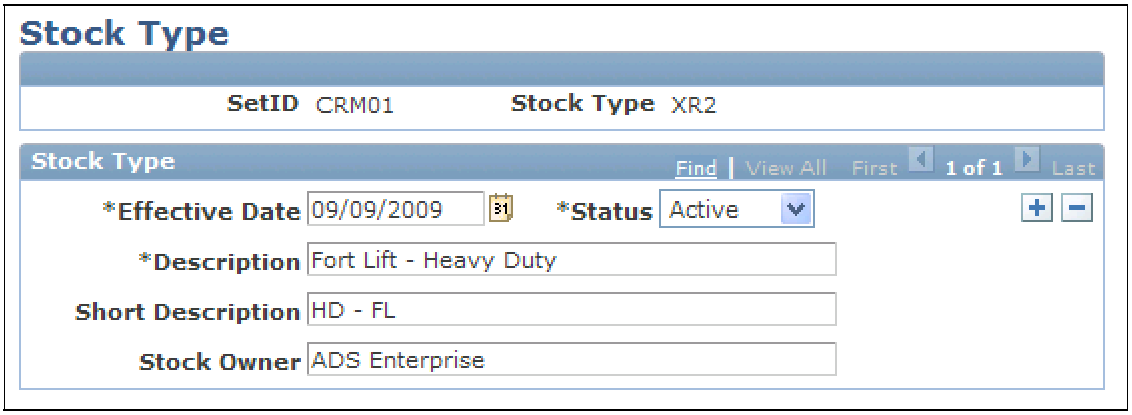
For example, you can define a group on *freezers* and create *freezer replacement parts* and *freezer accessories* as families of this group.

Fields on the Item Families and Item Groups pages are identical.

For more information about item families, refer to the *PeopleSoft Managing Items 9.1 PeopleBook* for defining item control values.

Defining Stock Types

Access the Stock Type page (Items CRM, Stock Types, Stock Type).



Stock Type page

Use this page to create ownership information codes for inventory items that are leased or consigned.

For information about stock types, refer to the *PeopleSoft Managing Items 9.1 PeopleBook* for defining item control values.

Defining and Maintaining Items

To define and maintain items, use the Item Definition (RF_ITEM_DEFN) component.

This section discusses how to:

- Define items.
- Establish substitute definitions.

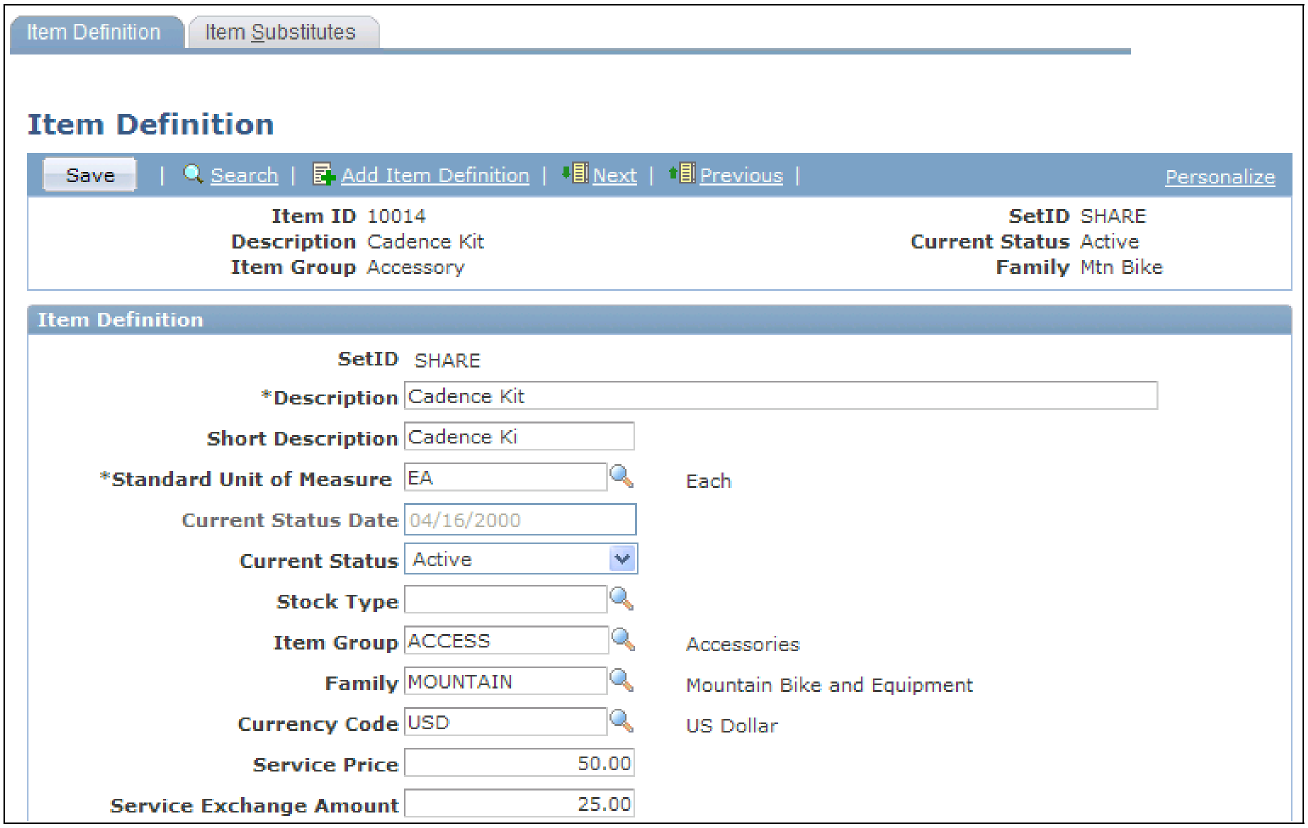
If you are synchronizing with another system using the Item Master EIP, you can view the current definition for an item in PeopleSoft CRM using the Item Definition component under Items CRM, Review Item Definition.

Pages Used to Define and Maintain Items

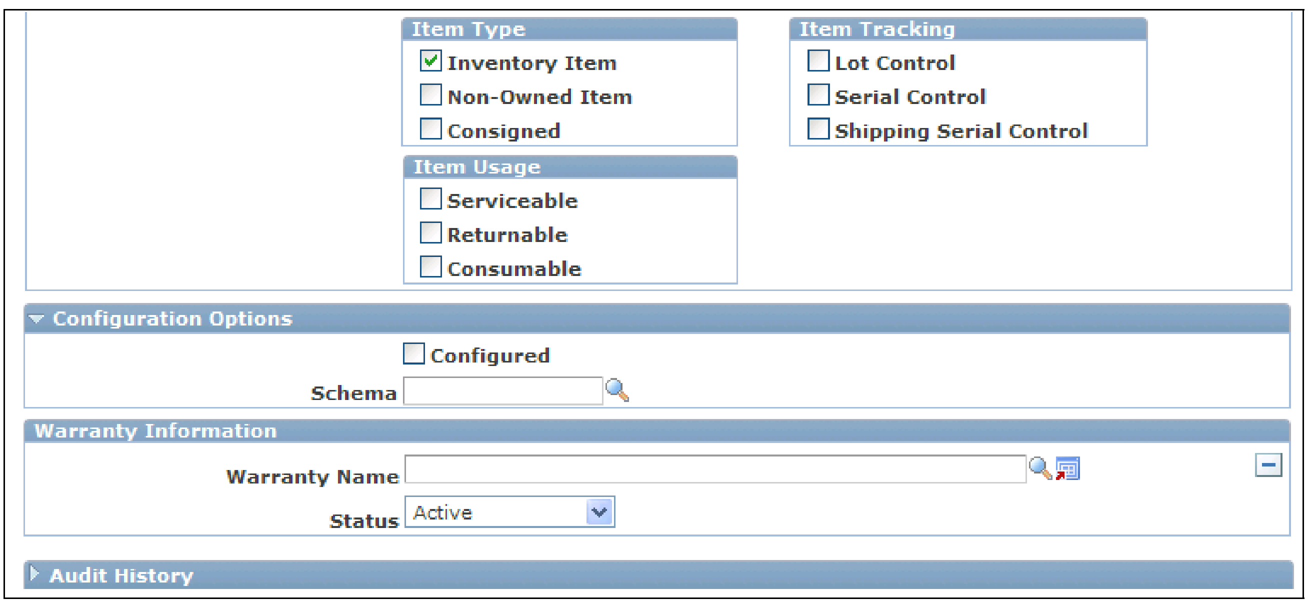
Page Name	Definition Name	Navigation	Usage
Item Definition	RF_ITEM_DEFN	• Items CRM, Inventory Item Definition, Item Definition • Items CRM, Review Item Definition, Item Definition	Define inventory items at the setID level.
Item Substitutes	RF_ITEM_SUB	• Items CRM, Inventory Item Definition, Item Substitutes • Items CRM, Review Item Definition, Item Substitutes	Establish substitution definitions for items. An item substitution definition specifies alternate items that may be used by personnel requesting stock for activities on service orders. View an item's substitution definition from the RMA Form component in PeopleSoft Support and from the Order Materials and Service Order component in PeopleSoft Integrated FieldService.

Defining Items

Access the Item Definition page (Items CRM, Inventory Item Definition, Item Definition).



Item Definition page (1 of 2)



Item Definition page (2 of 2)

Item Definition

Description and **Short Description**

Enter long and short descriptions. You cannot include embedded single or double quotation marks in the description text.

Note. The Short Description field exists only in CRM, not in PeopleSoft Inventory. This field can be updated even if the item EIPs are active.

Standard Unit of Measure

Enter the base UOM for the item that reflects the smallest transactable UOM for the item. Establish UOMs on the Units of Measure page under Set Up CRM, Common Definitions.

Warning! To minimize rounding discrepancies when using multiple UOMs, the standard UOM must be the smallest valid UOM for the item. Also, set up the standard UOM as a whole number.

Current Status Date

Displays the date on which the current status of the item definition was updated.

Stock Type

Enter the owner of the stock if the item is non-owned. First, you must establish stock types on the Stock Types page.

Item Group

Enter a group ID to categorize the item as an alternate search key. Establish item groups on the Item Groups page.

Family

Enter a family ID to categorize the item as an alternate search key. Establish item families on the Item Families page.

Currency Code

Enter the currency code used for the item.

Service Price

Enter the price for the service item being defined.

Note. This price is picked up for billing the customer when integrating with PeopleSoft Transaction Billing Processor for any materials that were used to service the customer.

Service Exchange Amount

Enter the amount the customer will be credited if the old item is exchanged for the new one.

Note. This price is used to credit the customer when performing a service order and removing material when integrating with PeopleSoft Transaction Billing Processor.

VAT Defaults (value added tax defaults)

Click to access the VAT Defaults Setup page, which is a common page used to set up VAT defaulting for all PeopleSoft applications that process VAT transactions. On this page, you can define VAT defaults for bill sources, per VAT registration country and state. Clicking this link transfers you to PeopleSoft Financials, where your must set up your VAT billing.

Service VAT Treatment Defaults

Click to access the Service VAT Treatment Drivers Setup page, which is a common page used to set up VAT services treatment for all PeopleSoft applications that process VAT transactions. If you are required to implement special handling for services, you can specify VAT service treatment defaults for bill sources on this page for a supplier's (seller's) location country and state. Clicking this link transfers you to PeopleSoft Financials, where your must set up your VAT billing.

Item Type

Inventory Item

Select if the item is physically stocked in inventory. You cannot create transactions in PeopleSoft Inventory for noninventory items.

Non-Owned Item

Select if the item is non-owned. PeopleSoft Inventory does not create accounting entries for non-owned item transactions. If you define an item as non-owned, you must also specify a stock type.

Consigned

Select if the item is consigned. Only non-owned items can be consigned.

Note. After an order for the item is initiated from the RMA component or the Order Materials component, the system does not enable values in the Item Type group box to be modified.

Item Tracking

Lot Control

Select if the item is tracked by lot ID.

In PeopleSoft Integrated FieldService, you must enter the lot ID for transactions of lot-controlled items that are initiated on the Order Materials page and when defining installed product records for lot-controlled items on the Installed Product and Services component. You also specify the lot ID on the Time Material Expense page on the service order.

In PeopleSoft Support, you may enter the lot ID for advanced exchange RMA transactions of lot-controlled items; however, it is not required.

In PeopleSoft Inventory, you must enter the lot ID at the time of receipt and putaway and for all inventory movement transactions of lot-controlled items.

Serial Control

Select to track each unit of the item in stock by a unique identifier. Serial-controlled inventory items are managed in units of one, based on the item's standard UOM.

In PeopleSoft Integrated FieldService, you must enter the serial ID for transactions of serial-controlled items that are initiated on the Order Materials page and when defining installed product records for serial-controlled items on the Installed Product page.

You also specify the serial ID on the Time Material Expense page on the service order.

In PeopleSoft Support, you must enter the serial ID for advanced return RMA transactions of serial-controlled items.

In PeopleSoft Inventory, you must enter the serial ID at the time of receipt and putaway and for all inventory movement transactions of serial-controlled items.

Shipping Serial Control

Select to assign a unique identifier to each unit of the item if serial tracking is required only at the time of shipment. Until ship-serial-controlled items are shipped, you can move them to different stock locations within the PeopleSoft Inventory business unit without serial control, which simplifies transaction processing and entry.

Serial numbers are then assigned at the time of shipment to provide tracking on products shipped to customers, internal locations, and other PeopleSoft Inventory business units.

When a user records the quantity received, used, not used, and removed for a ship-serial-controlled item on the Order Materials page in PeopleSoft CRM, you must enter the ship-serial ID. The system uses this ID to accurately update the customer's installed product record.

Note. You can also report on materials used and removed on the Time Material and Expense page.

Note. After an order for the item is initiated from the RMA Form component or the Order Materials component, the system does not enable values in the Item Tracking group box to be modified.

Item Usage

Serviceable

Select if a service can be performed on the item. You create services and service orders only for items that are serviceable. You specify products and installed products on the service order and items when you are ordering, receiving, using and removing materials.

Note. You should create services and service orders only for items that are serviceable.

Returnable

Select if the item can be returned. This data is for informational purposes only.

The removal of a nonreturnable item on the Time Material Expense page on the service order does not trigger any inventory adjustment transactions.

The system issues a warning if you try to return an item that is not identified as returnable using the RMA Form component. You can select to cancel or proceed with the transaction.

Consumable

Select if the item can be scrapped rather than returned. When the removal of a consumable item is recorded on the service order component, the system does not trigger any inventory adjustment transactions. However, the system updates the customer's installed product record to reflect the removal of the installed item.

Note. In the RMA Form, Service Order and Order Materials components, you can select items regardless of the *Serviceable, Returnable,* and *Consumable* check box settings.

Product Options

When you create a new item or select an item with a current status of *Under Initialization,* the system displays the Product Options group box to establish whether a corresponding product definition should be created simultaneously with the item definition.

Create Product

Select to create a corresponding product definition for this item.

Use Item ID

Select to make the product ID the same as the item ID. If selected, the Product ID field becomes unavailable for entry.

Product ID

Enter the ID for the product definition. If you set up automatic numbering for products, enter a value of *NEXT* to use the next available product ID.

Product Type

Enter the type of product. Delivered types include *Engagement Service, Package Product, Service Agreement, Service Product, Standard Product,* and *Subscription Product.*

Configuration Options

If your implementation includes a configurator application, define the configuration attributes for the item in the Configuration Options group box. The PeopleSoft CRM system supports a number of configurator applications, for example, PeopleSoft Advanced Configurator, Oracle Configurator, Lightly Configurator and PeopleSoft Sales Product Configurator.

Fields in this group box change dynamically depending on which configurator product is installed in the system (the information is available in General Options page under Set Up CRM, Installation Options).

If PeopleSoft Advanced Configurator is installed, the Configured and Schema fields appear. If PeopleSoft Sales Product Configurator is installed, the Configured,Distribution Model,Configuration Code Generation, and Template fields appear.

Note. All of the fields in the Configuration Option section can be modified on the CRM side, even if the Item EIPs (enterprise integration points) are active.

Configured — Select if one of the PeopleSoft configurator products can configure the item.

Schema — Enter a schema to be used for the configuration of the item. This field applies only to PeopleSoft Advanced Configurator.

Distribution Model — Enter a model to be used for the configuration of the item. This field applies only to PeopleSoft Sales Product Configurator.

Configuration Code Generation — Select to generate configuration codes automatically based on the specified template. This field applies only to PeopleSoft Sales Product Configurator.

You cannot change an item's configuration options to use configuration codes if the item is active in the system (such as inventory balances, customer orders, and so forth).

Template — Enter the name of the template that is used to generate configuration codes. This field applies only to PeopleSoft Sales Product Configurator.

See and *PeopleSoft Advanced Configurator 9.1 PeopleBook.*

Warranty Information

Warranty Name — Enter the warranty that is associated with the item. Establish warranties on the Warranty page.

Status — Select the current status of the warranty. Values are *Active* and *Inactive.*

Note. An item can have only one active warranty associated with it.

See Also

Chapter 4, "Defining Items," Understanding Item Definition in PeopleSoft CRM, page 33

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up and Managing Agreements and Warranties"

PeopleSoft CRM 9.1 Call Center Applications PeopleBook, "Managing Material Returns," Understanding Material Return Processing

PeopleSoft Integrated FieldService 9.1 PeopleBook, "Ordering and Receiving Materials"

Chapter 10, "Tracking Installed Products," Understanding Installed Products, page 137

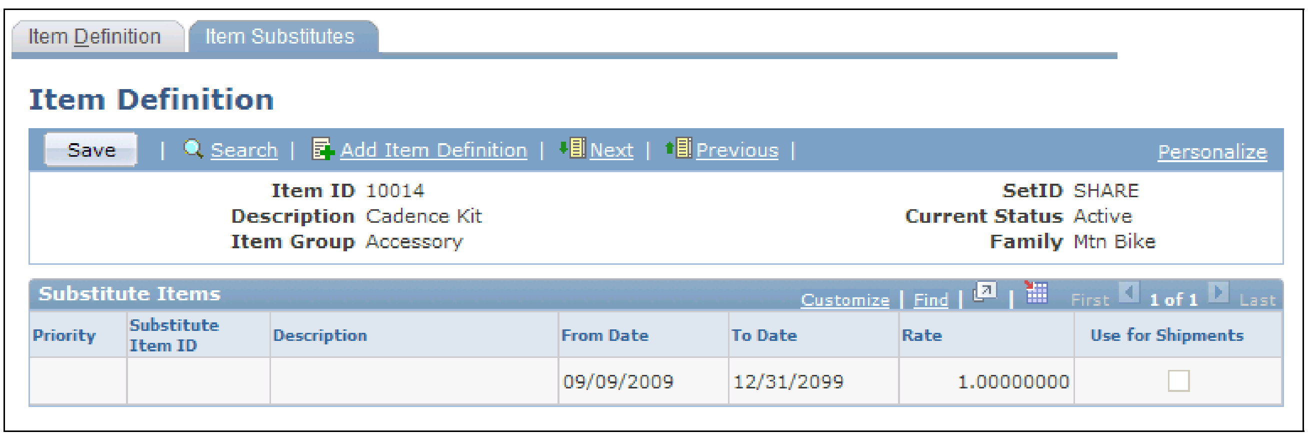
PeopleSoft Integrated FieldService 9.1 PeopleBook, "Setting Up Services"

PeopleSoft Integrated FieldService 9.1 PeopleBook, "Creating and Managing Service Orders"

PeopleSoft Inventory 9.1 PeopleBook

Establishing Substitute Definitions

Access the Item Substitutes page (Items CRM, Inventory Item Definition, Item Substitutes).



Item Substitutes page

Substitute Items

Priority

Enter a priority value for each substitute item that you add. The substitute item with the highest priority (the lowest number) should be the first choice when substitutions are made. Though priority does not need to be sequential, it must be greater than *0.*

From Date

Enter the date on which the substitute item becomes a valid substitution option. The default is the current date.

To Date Enter the date on which the substitute item is no longer a valid substitution option. The default is December 31, 2099.

Rate Enter the quantity of the substitute item that is required to replace the original item. The default conversion rate is *1.* Conversion rates are calculated using the item's standard UOM.

Use for Shipments Select if the substitute item is valid for material stock requests during the picking process in your inventory system.

See Also

PeopleSoft Integrated FieldService 9.1 PeopleBook, "Ordering and Receiving Materials"

PeopleSoft CRM 9.1 Call Center Applications PeopleBook, "Managing Material Returns," Understanding Material Return Processing

Associating Items with Additional UOMs

To associate items with additional UOMs, use the Unit of Measure (INV_ITEM_UOM) component.

You can define additional UOMs for item transactions. For example, suppose that you order an item by the case but ship it in individual units, you need two additional UOMs: a shipping UOM (each), and an ordering UOM (case). When multiple UOMs apply to a given item, PeopleSoft maintains conversion rates to facilitate processing.

This section discusses how to add UOMs.

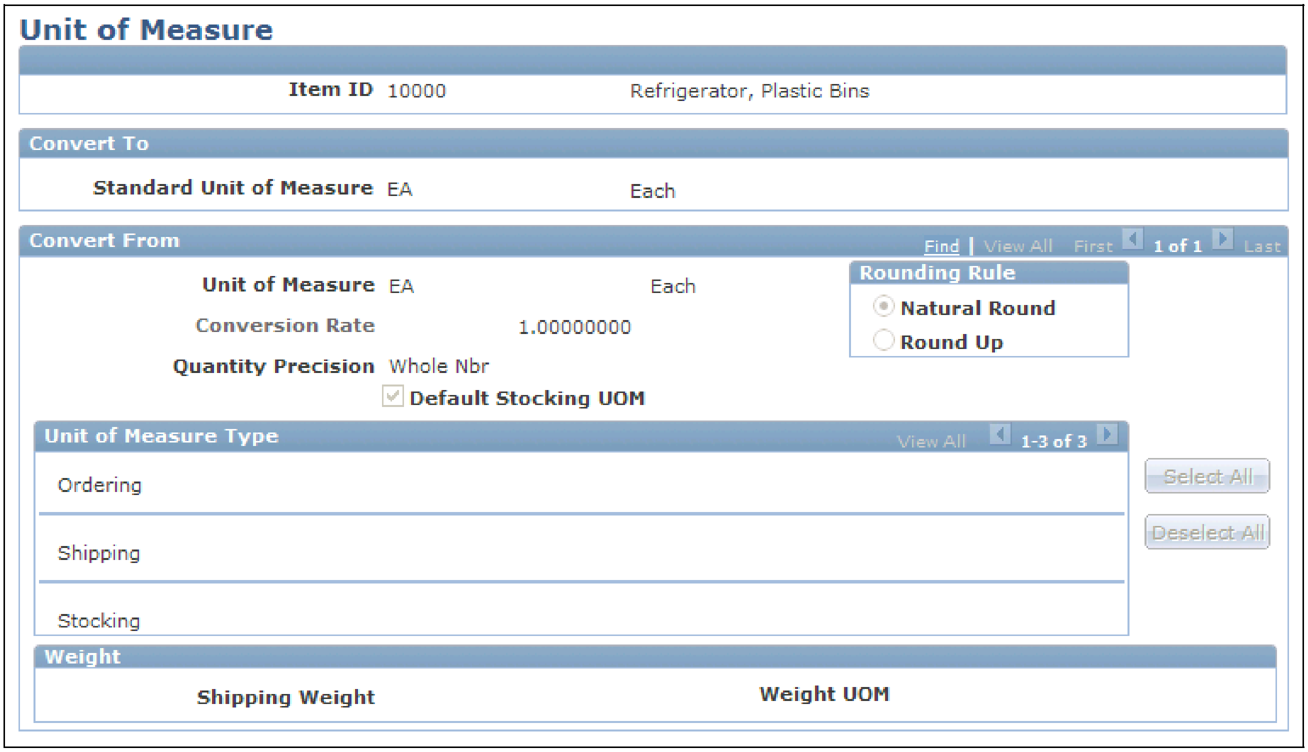
Note. When you define an item in the Item Definition component in PeopleSoft CRM, the system automatically inserts a row into the Units of Measure table with the standard UOM set up as a valid ordering, stocking, and shipping UOM.

Page Used to Associate Items with Additional UOMs

Page Name	*Definition Name*	*Navigation*	*Usage*
Units of Measure	INV_ITEM_UOM	Items CRM, Units of Measure, Unit of Measure	Add UOMs to an item.

Adding UOMs

Access the Unit of Measure page (Items CRM, Units of Measure, Unit of Measure).



Unit of Measure page

In PeopleSoft Order Capture, the system prompts for product UOMs that are defined as valid ordering UOMs. In PeopleSoft Integrated FieldService and Support, all item transactions are performed using the item's standard UOM.

This page appears as read-only if the unit of measure information is set to be populated automatically by a synchronization process. It is available for edit only when the unit of measure information is not synchronized.

Convert To

This group box displays the standard UOM that you defined for this item on the Item Definition page.

Convert From

Unit of Measure	Enter a UOM that is also used for transactions involving this item. You establish UOMs under Set Up CRM, Common Definitions, Units of Measure, Units of Measure.
	Note. In PeopleSoft Integrated FieldService, the system uses the item's standard UOM for all item transactions initiated from the Order Materials and Service Order component. Similarly, in PeopleSoft Support, the system uses the item's standard UOM only for RMA and replacement transactions initiated from the RMA Form component.

Conversion Rate

Enter the conversion rate between the standard UOM (in the Convert To group box) and the UOM (in the Convert From group box). If you specified the conversion rate between these two UOMs under Set Up CRM, Common Definition, Units of Measures, the CRM system populates the value automatically when you specify the UOM (in the Convert From group box).

To determine the conversion rate to enter, consider the relationship between the standard UOM and this new UOM. For example, suppose that the standard UOM for the item is EA (each) and this newly added UOM is CS (case), and one CS of the item contains 5 EA items. You would enter *5* as the conversion rate. The value's format is updated after you save the record.

Quantity Precision

Select how calculated or user-entered quantities should be presented in the system, as decimal (up to four decimal places) or whole number.

This field applies to PeopleSoft SCM.

Default Stocking UOM

Select if this UOM is the default stocking UOM. This field applies only to PeopleSoft SCM.

When you assign UOMs to an item on the Units of Measure page, you indicate whether each UOM is valid for ordering, shipping, or stocking transactions. If more than one UOM is valid for stocking, specify which of these should be the default stocking UOM.

Rounding Rule

These fields apply only to PeopleSoft SCM.

Unit of Measure Type

Select the kinds of transactions that use the selected UOM. You must select at least one UOM type for each item.

Ordering

Select if the UOM is used for stock requests or for express issue transactions in PeopleSoft Inventory. Order Management also uses the ordering UOM. In Order Capture, the system prompts for product UOMs that are defined as valid ordering UOMs.

Shipping

Select if the UOM is used for shipping and issues transactions in PeopleSoft Inventory.

Stocking

Select if the UOM is used for putaway or receiving transactions in PeopleSoft Inventory. You can also use this UOM for numerous other transactions in PeopleSoft Inventory, including transfers, container management, adjustments, picking, and physical accounting.

Select All and **Deselect All**	When you first define an item-UOM combination, only one field appears in the Unit of Measure Type group box. If the selected UOM is valid for all transactions involving this item, click the Select All button. If the selected UOM is no longer valid for a given transaction, click the Deselect All button to clear the UOM type fields, then insert valid transactions.

To associate the item with additional units of measure, add rows using the Add a new row button to the right of the Unit of Measure Type group box.

Weight

PeopleSoft Order Capture uses the Shipping Weight and Weight UOM fields to calculate shipping costs when it is integrated with a third-party freight calculator software (for example, ConnectShip).

See Also

Chapter 7, "Setting Up Products," page 69

Chapter 4, "Defining Items," Associating Items with Additional UOMs, page 48

PeopleSoft Integrated FieldService 9.1 PeopleBook, "Ordering and Receiving Materials"

PeopleSoft CRM 9.1 Call Center Applications PeopleBook, "Managing Material Returns," Understanding Material Return Processing

PeopleSoft Managing Items 9.1 PeopleBook

Chapter 5

Working with Item Assemblies

This chapter provides an overview of item assemblies and discusses how to:

- Define item assemblies.
- View assembly information.

Understanding Item Assemblies

Item service assemblies identify the components of an item that an organization can service or support. Once defined, technicians or call center agents can use the Review Assemblies component to reference the service assembly definition and help drive troubleshooting and service activities.

For every item within a setID in the system, you can define serviceable component items. You can also define service assemblies for a component item, creating service assemblies with multiple levels. Before you can define a service assembly, however, you must define the item and all of its component items.

For each assembly within a setID, you can define multiple versions using assembly codes. For example, suppose that you have a radio that is sold and serviced in the U.S. and Great Britain. You can define two assembly codes to reflect the radio's different power supply components.

In addition to identifying serviceable components for an item, technicians and call center agents can use service assemblies to check for manufacturers' warranties on the component parts of an item that is installed at the customer's site. In PeopleSoft Customer Relationship Management (PeopleSoft CRM), you can activate warranties that you offer for installed products; however, this warranty information is for the end item itself on the installed product record, not for any component items. You can check for warranties that you offer for the component item on the Review Assemblies - Components page.

See Also

Chapter 4, "Defining Items," page 33

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up and Managing Agreements and Warranties"

Defining Item Assemblies

To define assembly items, use the Assemblies Maintenance (BOM_MAINTENANCE) component.

This section lists common elements and discusses how to:

- Specify assembly components.
- Describe the service assembly and record notes.
- Define component details.
- Add notes to the assembly definition.

Common Elements Used in This Section

Op Seq (operation sequence)
: Enter the sequence in which the component is assembled. This value is informational in PeopleSoft CRM. Operation sequence is used primarily in PeopleSoft Manufacturing environments.

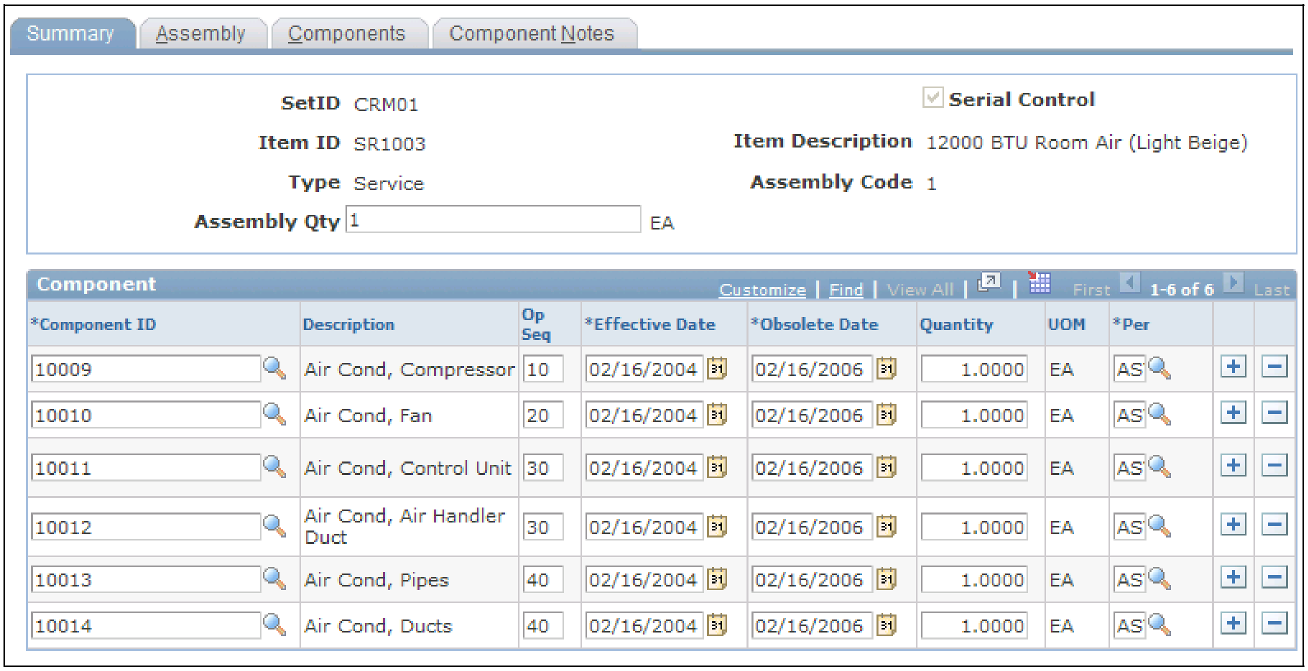
Quantity and **Per**
: Enter the quantity of the component that is required for each assembly or order of the end item, in the standard unit of measure (UOM) of the end item. The quantity is used primarily in PeopleSoft Manufacturing environments.

Pages Used to Define Item Assemblies

Page Name	***Definition Name***	***Navigation***	***Usage***
Assemblies - Summary	EN_BOM_MAINT	Items CRM, Assemblies, Summary	Define and maintain the serviceable components for a given combination of setID and item.
Assemblies - Assembly	EN_BOM_TEXT	Items CRM, Assemblies, Assembly	Describe the service assembly and record any applicable notes.
Assemblies - Components	EN_COMP_MAINT	Items CRM, Assemblies, Components	View or modify details about each assembly component.
Assemblies - Component Notes	EN_COMP_TEXT	Items CRM, Assemblies, Component Notes	View or record notes that relate to a specific component on a service assembly.

Specifying Assembly Components

Access the Assemblies - Summary page (Items CRM, Assemblies, Summary).



Assemblies - Summary page

Assembly Qty (assembly quantity)

Enter the end item quantity in the standard UOM of the item as you defined it on the Item Definition page. In general, set the assembly quantity to *1* and enter the component quantity that is included in one unit of the end item. However, if you typically install and service the end item in quantities greater than one, you might define a service assembly in terms of the normal installation and service quantity.

For example, a manufacturer and distributor of speakers might produce and stock speakers in inventory as single units. Yet because a customer always buys at least two speakers at a time, the speaker company might choose to set up a service assembly with an assembly quantity of two.

Component ID

Select a service assembly component. You must establish the component as an active item using the Item Definition page or the Item Master enterprise integration point. In addition, the component item must conform to these restrictions:

- The component item cannot be the same as the end item.
- The effectivity period, which the effective and obsolete dates specify for the component, cannot overlap with other rows for the same component ID.

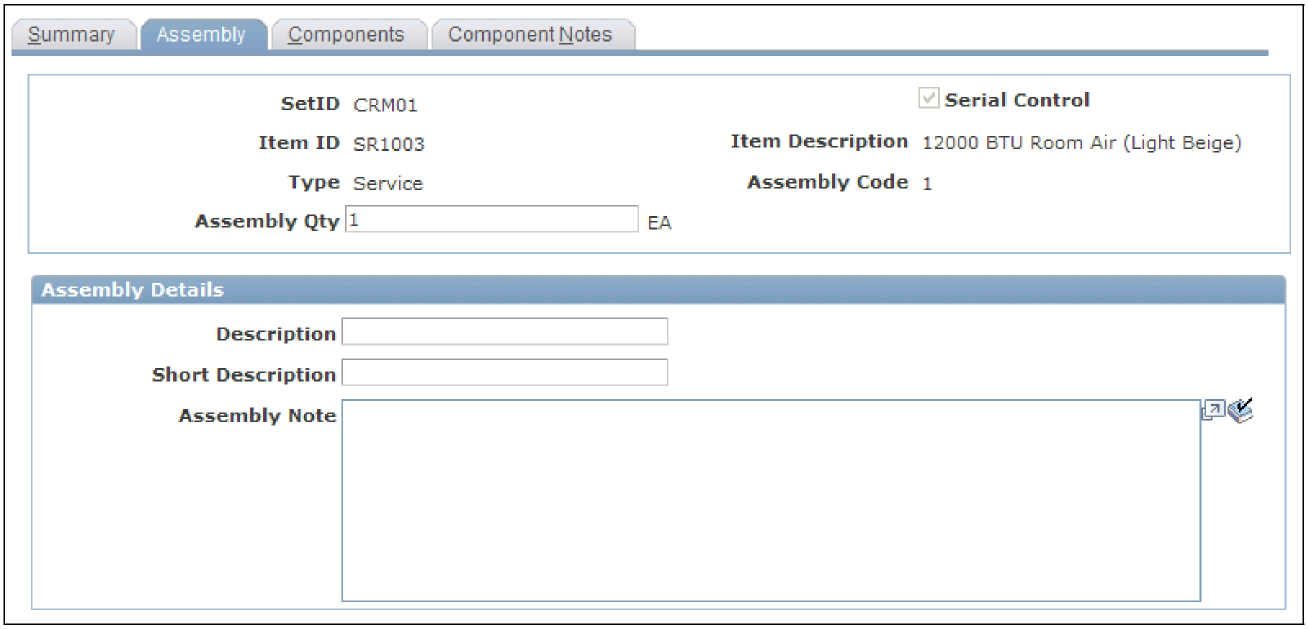
See Also

Chapter 4, "Defining Items," page 33

PeopleSoft Manufacturing 9.1 PeopleBook, "Understanding PeopleSoft Bills of Material and Routings"

Describing the Service Assembly and Recording Notes

Access the Assemblies - Assembly page (Items CRM, Assemblies, Assembly).

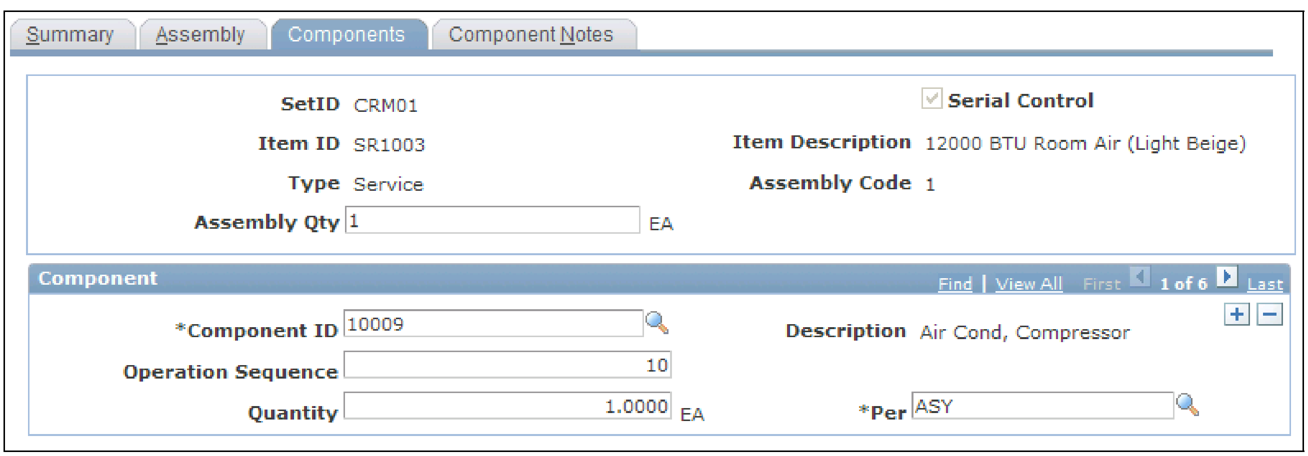


Assemblies - Assembly page

Use the Assembly Details section of this page to describe any appropriate details of the assembly and any notes that may apply.

Defining Component Details

Access the Assemblies - Components page (Items CRM, Assemblies, Components).



Assemblies - Components page

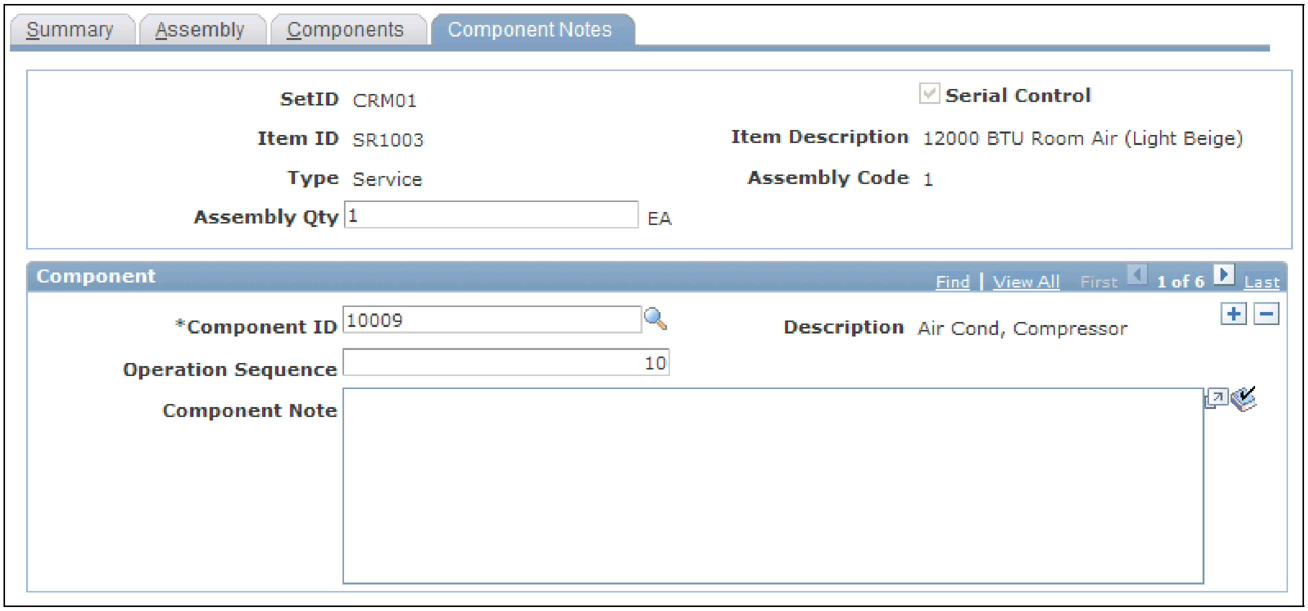
Component ID	Select a service assembly component. The system automatically populates the description of the component item.

See Also

PeopleSoft Manufacturing 9.1 PeopleBook, "Understanding PeopleSoft Enterprise Bills of Material and Routings"

Adding Notes to Assembly Definition

Access the Assemblies - Component Notes page (Items CRM, Assemblies, Component Notes).



Assemblies - Component Notes page

If a manufacturer or another third party offers a warranty on a component item, you can note it on this page.

Viewing Assembly Information

To view assembly information, use the Assemblies Inquiry (BOMINQUIRY) component.

This section lists common elements and discusses how to:

- Search for item assemblies.
- View component detail and warranty information.

Common Elements Used in This Section

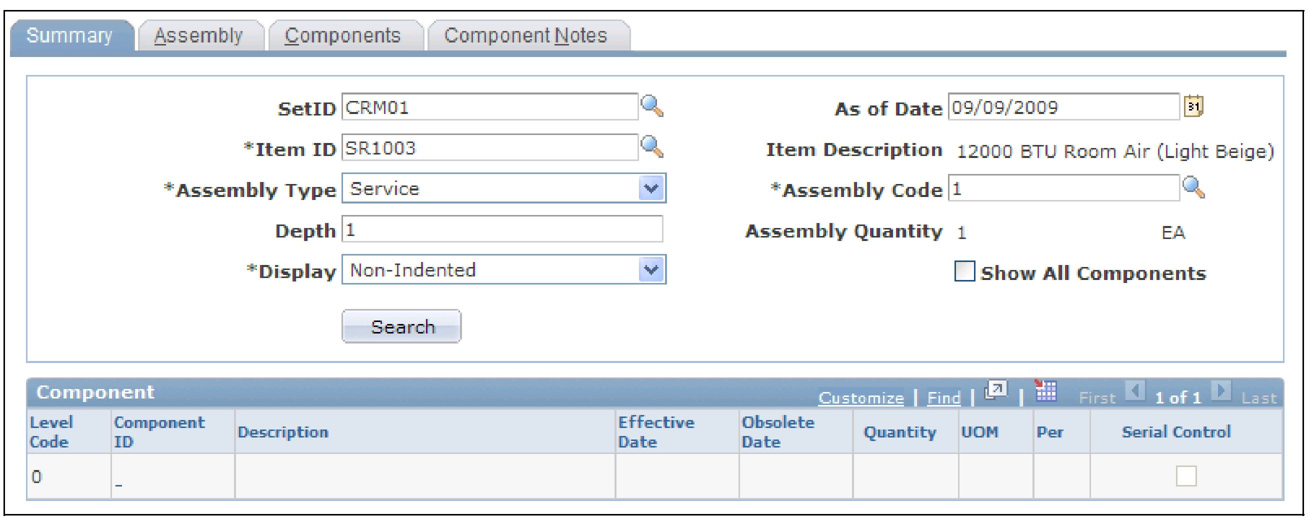
Quantity and **Per**	Displays the quantity of the component that is required for each assembly or order of the end item, in the standard UOM of the end item.

Pages Used to View Assembly Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Review Assemblies - Summary	EN_BOM_INQUIRY	Items CRM, Review Assemblies, Summary	View the serviceable components that are defined for a given combination of setID and item.
Review Assemblies - Assembly	EN_BOM_INQ_HEADER	Items CRM, Review Assemblies, Assembly	View a description of the service assembly and any recorded notes.
Review Assemblies - Components	EN_BOM_INQUIRY_D	Items CRM, Review Assemblies, Components	View details about each component in the assembly.
Review Assemblies - Component Notes	EN_BOM_INQ_D_TXT	Items CRM, Review Assemblies, Component Notes	View notes that are related to a specific component of a service assembly.

Searching for Item Assemblies

Access the Review Assemblies - Summary page (Items CRM, Review Assemblies, Summary).



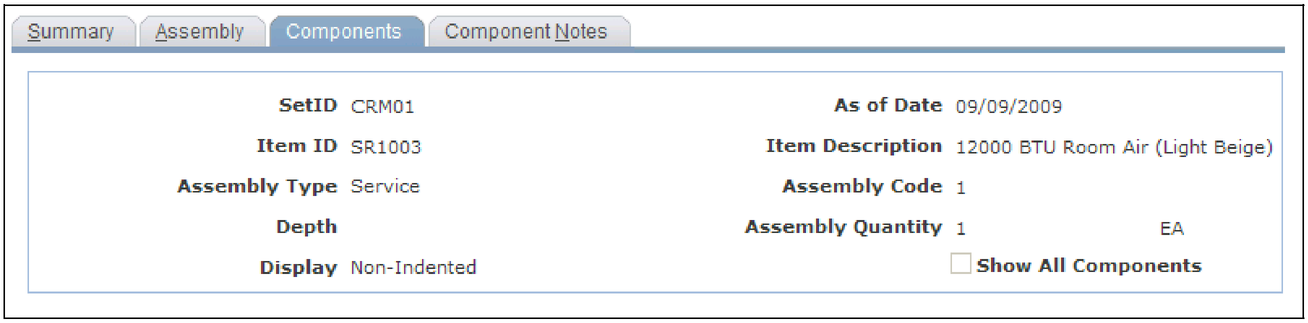
Review Assemblies - Summary page

Enter search criteria for the service assembly that you want to view.

SetID	Enter the setID of the service assembly. The system populates this value with the default setID that is associated with your user ID on the User Preferences - Overall Preferences page, if applicable.
As of Date	Enter the effective date of the service assembly. If you choose not to show all components, the system displays only the components that are defined for the service assembly that is in effect for this date.
Item ID	Enter the end item for which a service assembly has been defined.
Assembly Type	Select *Service.* Although other assembly types are available, only *Service* is applicable for PeopleSoft CRM applications.
Assembly Code	Enter the version of the service assembly that is defined for the setID and item combination. Assembly codes can range from 1 to 99.
Depth	Enter the component level of the service assembly. To view all levels, enter *99.*
Display	Select the formatting method to display the service assemblies. Values are: *Indented:* Select to display the service assembly components with each level indented relative to the previous level. If you select a depth greater than 1, the system automatically sets this value. *Non-Indented:* Select to display the service assembly components as a simple list without indentation.
Show All Components	Select to view all components that are defined for a service assembly regardless of the effective date.
Level Code	Displays the level of the component on the service assembly.
Component ID	Displays the item ID of each component. Click the item ID to access the Review Assemblies - Components page and view details, including warranty information, about the component item.

Viewing Component Detail and Warranty Information

Access the Review Assemblies - Components page (Items CRM, Review Assemblies, Components).



Review Assemblies - Components page

Component

Level Code	Displays the level in the service assembly at which the component item is defined.
Item	Displays the item ID and description.
Op Seq (operation sequence)	Displays the sequence in which the component appears in the assembly structure.

Warranty Information

This section displays the warranty that you establish for the component item on the Item Definition page, if applicable.

See Also

Chapter 4, "Defining Items," page 33

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up and Managing Agreements and Warranties"

Chapter 6

Checking Item Balances and Availability

This chapter provides an overview of balance inquiries and discusses how to view balance information.

Understanding Balance Inquiries

This section discusses:

- Item availability inquiries.
- Item balance inquiries by business units.
- Item balance inquiries by group members.

Item Availability Inquiries

If you integrate PeopleSoft Customer Relationship Management (PeopleSoft CRM) with PeopleSoft Inventory and you are accessing system pages through the portal using the single sign-on feature, links to the Item/Product Availability component in Inventory are available from the Order Materials and Service Order components in PeopleSoft Integrated FieldService and the Return Material Authorization component in PeopleSoft Support. With the Item/Product Availability component, you can confirm the current available quantity for an item, check cumulative available-to-promise quantity for future dates, and view future supply and demand information for the item.

To inquire item availability from the Return Material Authorization component for an advanced exchange return material authorization (RMA):

1. Click the View Related Links button in the Replacement Item(s) grid on the Return Material Authorization page.
2. Click the Item Availability link on the transfer page.

To inquire about item availability within PeopleSoft Integrated FieldService, click the Check Availability link adjacent to the Quantity in Truck on the Order Materials page and then click the Item Availability link on the transfer page.

You can also check availability from the Required Material page within a service order in PeopleSoft Integrated FieldService. Click the Check Availability link next to the Quantity in Truck then click the Item Availability link on the transfer page.

See Also

PeopleSoft Integrated FieldService 9.1 PeopleBook, "Ordering and Receiving Materials"

PeopleSoft CRM 9.1 Call Center Applications PeopleBook, "Managing Material Returns," Understanding Material Return Processing

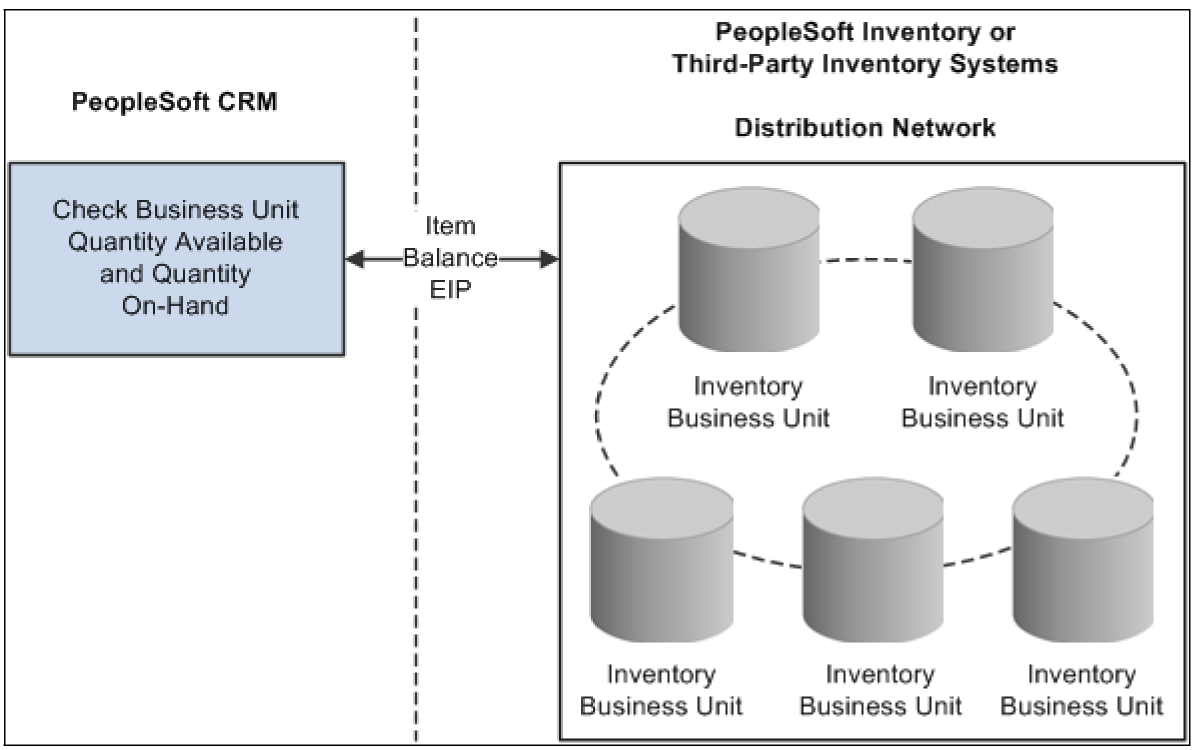
PeopleSoft Inventory 9.1 PeopleBook

Item Balance Inquiries by Business Units

PeopleSoft CRM uses the Item Balance enterprise integration point (EIP) to retrieve quantity available and on-hand balance information in real-time from the inventory business units that are included in the distribution network that is defined for customer support or field service operations. The sequence of business units reflects their order in the distribution network.

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

This diagram illustrates the integration between PeopleSoft CRM and your inventory and procurement system that supports checking quantity that is available and on hand in the inventory distribution network:



Data flow from inventory systems to PeopleSoft CRM

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Oracle's PeopleSoft CRM Application Fundamentals Preface"

Item Balance Inquiries by Group Members

In PeopleSoft Integrated FieldService, you can check item balances for the good truck stock storage locations that are associated with each group member in a provider group. You can use this balance information to select a group member to assign to a service order activity and to decide how much, if any, material must be ordered to complete the work on the service order activity.

PeopleSoft CRM uses the Item Balance EIP to retrieve balance information in real-time for the good truck stock storage locations that are associated with each member of the assigned provider group from PeopleSoft Inventory or a third-party inventory system. The balance information appears on the Item Balance by Group Member page in PeopleSoft CRM.

The system retrieves balance information only for group members who are associated with storage locations on the Storage Location page of the Worker component. This sequence of rules governs which group members' storage location balances the system retrieves:

1. If one or more group members are assigned to the service order activity, the system retrieves balance information for the group members that are assigned to the line.

2. If no group member is assigned to the service order activity but a provider group is specified, the system retrieves the balance information for all group members that are associated with the provider group on that activity.

3. If no group member or provider group is assigned at the activity level, the system displays an error message.

See Also

PeopleSoft Integrated FieldService 9.1 PeopleBook, "Understanding Inventory Storage Locations for Technicians"

PeopleSoft Integrated FieldService 9.1 PeopleBook, "Ordering and Receiving Materials"

Viewing Balance Information

To view balance information, use the Order Materials (RF_MATERIAL_ORDERS) component and, in the Service Order Component, RF_SERVICE_ORDER.

This section lists common elements and discusses how to:

- Check item balances by inventory business units.
- Check item balances by group members.

- View error messages.

Common Elements Used in This Section

The Message Log button indicates that the system recorded in the Message Log an error that the Item Balance EIP encountered. Click the button to view the message on an Item Balance Message page.

Pages Used to View Balance Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Item Balance by Business Units	RF_STOR_LOC_RST	• From the Return Material Authorization page in PeopleSoft Support (select Support, Returns), click the View Related Links button following the Replacement Item ID field and then click the Item Balance link on the transfer page. • From the Required Material page within the service order in PeopleSoft Integrated FieldService, click the Check Availability link next to the Quantity in Truck field and then click the Item Balance by Business Units link on the transfer page. • From the Order Materials page, click the Check Availability link next to the Quantity in Truck field and then click the Item Balance by Business Units link on the transfer page.	Check item balances for the inventory business units that are included in the distribution network that you define for customer support or field service operations.

Page Name	***Definition Name***	***Navigation***	***Usage***
Item Balance by Group Members	RF_STOR_LOC_RST	• From the Required Material page within the service order in PeopleSoft Integrated FieldService, click the Check Availability link next to the Quantity in Truck field and then click the Item Balance by Group Members link on the transfer page. • From the Order Materials page, click the Check Availability link next to the Quantity in Truck field and then click the Item Balance by Group Members link on the transfer page.	Check item balances for group members of the assigned provider group.
Return Message from Inventory	RF_ITM_BAL_MSG1 RF_ITM_BAL_MSG2 RF_ITM_BAL_MSG3	Click the Message Log button on the Item Balance by Business Units page or the Item Balance by Group Members page.	View messages about problems that the PeopleSoft CRM system encountered when it attempted to retrieve item balance information from the inventory system with the Item Balance EIP.

Checking Item Balances by Inventory Business Units

Access the Item Balance by Business Units page (from the Return Material Authorization page in PeopleSoft Support (select Support, Returns), click the View Related Links button following the Replacement Item ID field and then click the Item Balance link on the transfer page).

Note. This page is available only if you have implemented the Item Balance EIP to retrieve quantity balance information from PeopleSoft Inventory or a third-party inventory system.

Click the Message Log button to access the Return Message from Inventory page.

IN Unit (inventory business unit)

Displays the inventory business unit in the distribution network that is associated with support or field service activities. The sequence of the business units reflects their order in the distribution network.

Quantity Available

Displays a subset of the quantity on hand, which reflects the total item quantity that you can use to fulfill demand.

Quantity On Hand

Displays, in the total item quantity in a particular business unit, regardless of the stock's inventory status and storage location. The field value includes both the item quantity available and the quantity reserved.

Note. This total does not reflect the total item quantity that you can use to fulfill demand.

Quantity Owned

Displays, in the item's standard unit of measure, the amount of the item that the inventory business unit owns.

Depending on from where you navigated, these links can appear at the bottom of the page: Return to RMA, Service Order, and Order Materials. Click a link to return to the corresponding component.

Checking Item Balances by Group Members

Access the Item Balance by Group Members page (from the Required Material page within the service order in PeopleSoft Integrated FieldService, click the Check Availability link next to the Quantity in Truck field and then click the Item Balance by Group Members link on the transfer page).

Note. This page is available only if you have implemented the Item Balance EIP to retrieve quantity balance information from PeopleSoft Inventory or a third-party inventory system.

Click the Message Log button to access the Return Message from Inventory page.

Provider Group Name

Displays the name of the provider group that is assigned to the service order activity.

Group Member Name

Displays the name of the group member that is assigned to the service order activity.

IN Unit (inventory business unit)

Identifies the inventory business unit where the group member's truck stock storage locations are defined.

Quantity Available

Displays the amount of the item that is available to fulfill orders in the group member's good truck stock storage location.

Area, Level 1, Level 2, Level 3, and **Level 4**

Displays the material storage area in PeopleSoft Inventory or the third-party inventory system that corresponds to the worker's good storage location. You can define a storage location definition in an inventory system using a storage area and up to four levels representing a physical subdivision of the storage area, such as aisles, rows, shelves, and bins.

See Also

PeopleSoft Integrated FieldService 9.1 PeopleBook, "Understanding Inventory Storage Locations for Technicians"

Viewing Error Messages

Access the Return Message from Inventory page (click the Message Log button on the Item Balance by Business Units page or the Item Balance by Group Members page).

Note. This page is available only if problems occur while retrieving balance information with the Item Balance EIP.

The Message Node (for Item Balance by Business Units) or Storage Area Message (for Item Balance by Group Members) group box displays information about errors with the Item Balance EIP process.

The return message is the message catalog number.

Typically, business unit errors indicate that the business unit has not been defined or the business unit-item combination is invalid in the inventory system. Storage area errors typically indicate that the storage location for the technician's truck stock has not been defined or the storage location-item combination is invalid in the inventory system.

Chapter 7

Setting Up Products

This chapter provides an overview of products in PeopleSoft Customer Relationship Management (PeopleSoft CRM) and discusses how to:

- Define products.
- Assign product units of measure (UOMs).
- Define product packages.
- Establish product prices.
- Manage product relationships.
- Enter product notes.

Understanding Products in PeopleSoft CRM

This section discusses:

- Product definitions in PeopleSoft CRM.
- Integrations with PeopleSoft Supply Chain Management (PeopleSoft SCM) and PeopleSoft Proposal Management.

Product Definitions in PeopleSoft CRM

PeopleSoft CRM uses a product definition to represent each product. The product definition, which is keyed by product ID, stores all of the product information that company representatives require to sell or support the product. PeopleSoft CRM also uses product definitions for:

- Pricing product orders.
- Generating product catalogs.
- Storing product advisor scripts for use by sales and support personnel.

Product Definition Types

PeopleSoft CRM uses these types of product definitions:

- Standard product

- Package product
- Service agreement
- Service product
- Engagement service
- Subscription product
- Commitment product

  See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Setting Up Multilevel Product Bundles," Commitment Products.

See and Chapter 2, "Understanding Products and Items in PeopleSoft CRM," page 9.

Product Definition Process

Complete these steps to define products in PeopleSoft CRM:

1. Analyze how the various parts of the CRM system use product definitions.

   For example, the catalog generation process and the ordering process can both use product definitions.

2. Create definitional elements to associate with products.

   Definitional elements are attributes such as product brands, product categories, and competency codes. You associate definitional elements with product IDs to create unique product and product package definitions.

   See and Chapter 3, "Setting Up Product Definitional Elements," page 13.

3. Select a product type and create a product definition.

   After you define a product, the product ID becomes available on product search lists so that you can access the product definition from other CRM pages.

   Important! In PeopleSoft CRM, you can define a product when you define an item or you can create a product and associate it with existing items. Typically, you begin by defining an item and having the system copy the product ID, description, and standard UOM of the item to the product definition table.

   See and Chapter 4, "Defining Items," page 33.

4. Associate definitional elements and other product attributes with the product ID.
5. Select package components (if the product definition is for a product package).
6. Assign product UOMs.
7. Establish product prices.
8. Define relationships between products.
9. Associate notes with products.

Integrations with PeopleSoft SCM and PeopleSoft Proposal Management

Product information is integrated with PeopleSoft SCM (and third-party SCM systems) and PeopleSoft Proposal Management, which is part of the PeopleSoft Enterprise Services Automation product suite, by using enterprise integration points (EIPs). The considerations for using EIPs are discussed in the following paragraphs.

SCM Integrations

SCM systems use product definitions to manage products and product components throughout the manufacturing process. PeopleSoft CRM delivers several EIPs that maintain data integrity between PeopleSoft CRM and SCM systems, including PeopleSoft SCM and third-party systems, by synchronizing product data.

You use the PeopleTools Integration Broker to integrate product data. This technology enables both synchronous and asynchronous messages to be transmitted using one technology.

Note. To synchronize product groups that have product group types of *GEN* between your SCM and CRM databases, initiate the PRODUCT_GROUP_FULLSYNC EIP before initiating the PRODUCT_FULLSYNC EIP, regardless of whether PeopleSoft CRM is the publishing or subscribing database.

These EIPs are used for both publishing and subscribing:

- PRODUCT_SYNC
- PRODUCT_FULLSYNC
- PRODUCT_SYNC_EFF

Note. If the PRODUCT_SYNC message is active, an add, change, or delete action in the Product Definition component automatically executes the product sync publish logic.

PeopleSoft CRM publishes the PRODUCT_SYNC message whenever product data is added, changed, or deleted using the Product Definition - Definition page, the Package Components page, the Product Price page, the Package Component Pricing page, the Notes page, the Relationships component (PROD_RELATIONS_CMP), and the Product Unit of Measure page.

PeopleTools Integration Broker processes the message and applies a transformation to remove the PRODKIT_HEADER. Any package components that are themselves packages are also stripped from the message. Because PeopleSoft SCM does not permit packages within packages, package components that are themselves packages are also stripped from the message.

PeopleSoft CRM subscribes asynchronously to the PRODUCT_SYNC message that comes from the SCM system. This data is processed directly into the PeopleSoft CRM product tables using component interfaces. A product package header record is added for any kit components that are received from SCM. When a PRODUCT_SYNC or PRODUCT FULL_SYNC message is received, the system runs the subscription logic, which calls one of these component interfaces depending on the content of the message:

- PRODKIT_CI
- PRODKIT_COMPS_PRC_CI
- PROD_DEFN_CI

- PROD_NOTE_CI
- PROD_PRICE_CI
- PROD_RELATIONS_CI
- PROD_UOM_CI

Note. Before publishing the Product full sync message, enter matching values in the product brand table (PROD_BRAND_TBL) using the Product Brand pages in CRM (Products CRM, Product Brand) and SCM (Set Up Financials/Supply Chain, Product Related, Order Management Foundation, Brand, Product Brand). If you don't enter values in the product brand table, the system may display an error message.

This table shows how an order represents packages to the PeopleSoft SCM system:

Type	*Line Display*	*Line Data Model/EIP*
0-Static Package (1-level static quantity) PROD_ITEM.PROD_KIT=Y PROD_KIT_HEADER.LT_CONFIG_FLAG=N	Display all components of the package as multiple lines.	Store and publish parent line.
1-Package (Kit) (multilevel dynamic quantity) PROT_ITEM.PROD_KIT=Y PROD_KIT_HEADER.LT_CONFIG_FLAG=Y	Display all components of the package as multiple lines.	Store all components as multiple lines, and publish as multiple lines.
2-Configured Package(Kit) PROD_ITEM.PROD_KIT=Y PROD_ITEM.CFG_KIT=Y	Display all components of the package as multiple lines.	Store all components as multiple lines, and publish as multiple lines.
3-Configured Product MASTER_ITEM_TBL.DIST_CFG_FLG=Y	Display high-level parent line.	Store and publish parent line plus configuration.

Proposal Management Integrations

PeopleSoft CRM can send information to PeopleSoft Proposal Management. This action occurs when a quote that originates from a PeopleSoft Sales lead or opportunity or is entered using PeopleSoft Order Capture includes an engagement service product. PeopleSoft Proposal Management prices the engagement and sends pricing information back to PeopleSoft CRM.

This integration consists of these application messages:

- OC_ESA_PROPOSAL

  This message is sent to PeopleSoft Proposal Management when a quote is submitted for an engagement-type service in PeopleSoft Order Capture.

- OC_ESA_PROPOSAL_RESPONSE

  This message returns the capture ID, proposal ID, and version ID from PeopleSoft Proposal Management to PeopleSoft Order Capture.

- ESA_PROPOSAL_PRICE

  When PeopleSoft Proposal Management completes pricing the engagement, pricing information is sent back to PeopleSoft Order Capture.

- OC_ESA_PROPOSAL_STATUS

  This message sends the status of a proposal (for example, draft or negotiated) to PeopleSoft Proposal Management.

Important! Before you can integrate with PeopleSoft Proposal Management, you must define the Engagement Service product.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook.*

Defining Products

To define products, use the Product Definition (PROD_DEFN) component.

This section discusses how to:

- Define product information.
- Define external product descriptions.
- Define product actions.
- Define product attributes.
- Attach files to product definitions.
- Define installed product rules.
- Attach images to product definitions.
- Associate branch scripts with products.
- Add products to product groups.
- Define product availability for regions.
- Track competing products.
- Enter sub business projects.

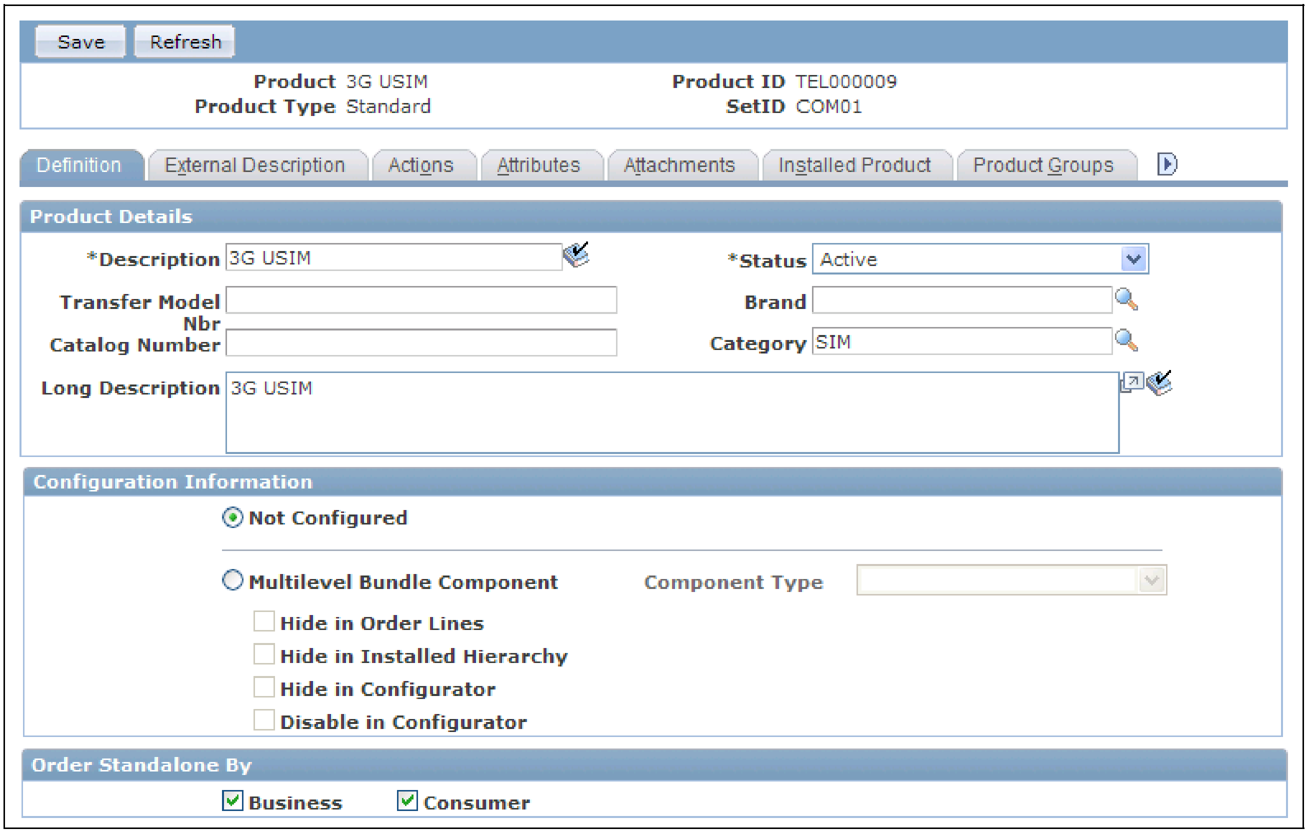
Note. You can now set up pricing for metallic numbers. Vanity, or metallic, phone numbers are phone numbers that are easy to remember. For example, 800 777–1234. In Europe, these numbers are typically called metallic numbers.

Pages Used to Define Products

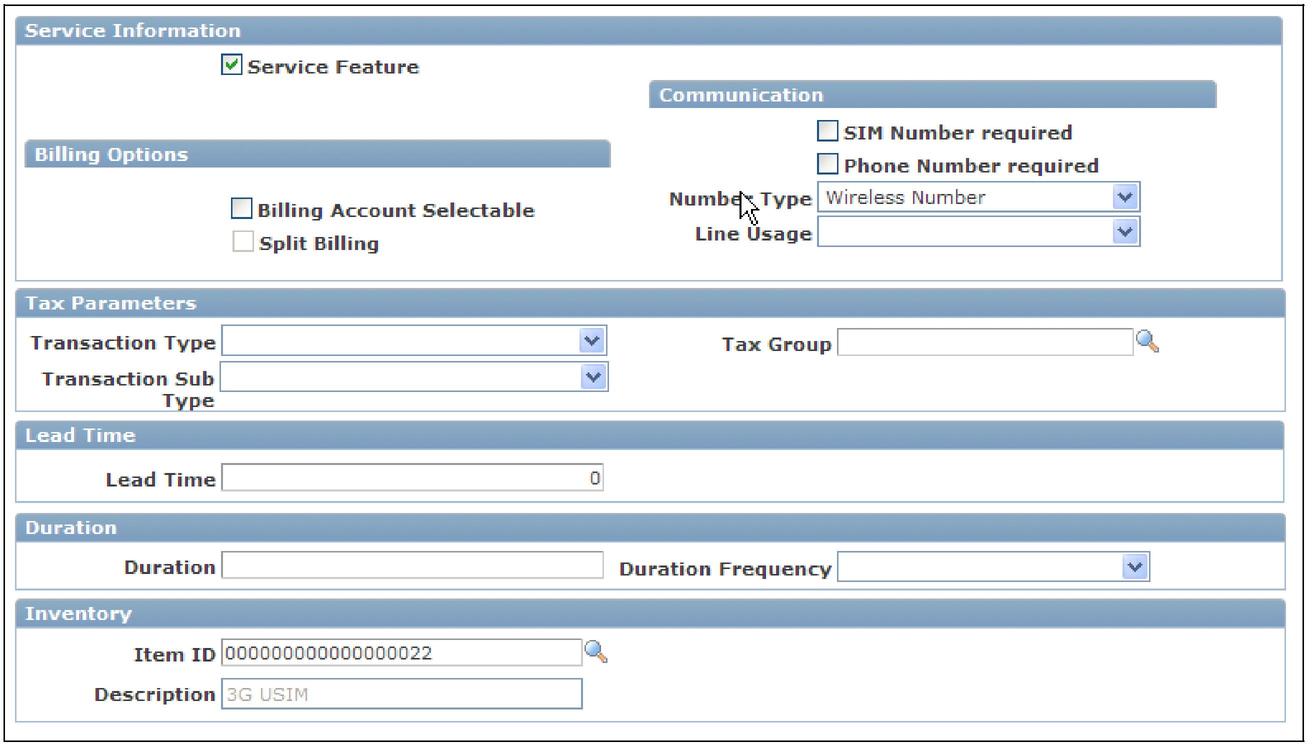
Page Name	*Definition Name*	*Navigation*	*Usage*
Product Definition - Definition	PROD_DEFN	Products CRM, Product Definition, Definition	Define product information.
Product Definition - External Description	PROD_EXT_DESCR	Products CRM, Product Definition, External Description	Define the external description of a product.
Product Definition - Actions	RBT_PROD_ACTION	Products CRM, Product Definition, Actions	Define actions that occur during the life cycle of a product.
Product Definition - Attributes	RB_ATTR_RUN_PROD	Products CRM, Product Definition, Attributes	Define product attributes, such as dimensions, materials used in manufacturing, and color.
Product Definition - Attachments	PROD_ATT	Products CRM, Product Definition, Attachments	Attach files to a product.
Product Definition - Installed Product	PROD_INSTALL	Products CRM, Product Definition, Installed Product	Define rule sets for processing installed products.
Product Definition - Product Groups	PROD_GROUP_LNK	Products CRM, Product Definition, Product Groups	Add products to product groups.
Product Definition - Images	PROD_IMAGES	Products CRM, Product Definition, Images	Attach images of different sizes to a product.
Product Definition - Branch Scripts	PROD_BSCRIPT	Products CRM, Product Definition, Branch Scripts	Associate a branch script with a product.
Product Definition - Regions	PROD_REGION	Products CRM, Product Definition, Regions	Define sales regions for products.
Product Definition - Competitors	PROD_COMPTTRS	Products CRM, Product Definition, Competitors	Track competitors' products.
Product Definition - Sub Business Projects	RBT_PROD_BUSPRJ_PG	Products CRM, Product Definition, Sub Business Projects	Enter business projects that are associated with the product.

Defining Product Information

Access the Product Definition - Definition page (Products CRM, Product Definition, Definition).



Product Definition - Definition page (1 of 2)



Product Definition - Definition page (2 of 2)

Note. Different sections appear on this page depending on the product type that you select when you add the product definition. The display template that you associate with the product type controls the appearance of the page.

See and Chapter 7, "Setting Up Products," Product Definitions in PeopleSoft CRM, page 69. and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates."

Product Details

This information identifies the product, and it appears for all product types. The specific fields that appear vary depending on the requirements of the product type. For example, engagement services do not have a catalog number, model number, brand, or category.

Model Number and **Catalog Number**	Enter the product catalog number and model number if a product appears in another vendor catalog.

Order Standalone By

This group box appears for all product types.

Business	Select if the product is available as a standalone product (not part of a package) to businesses.
Consumer	Select if the product is available as a standalone product to consumers.

Note. If you do not select either of these options, the system treats the product as one that is available only as a package component.

Service Information

Service Feature

Select if the service is a feature that enhances the main product or service. For example, related service features for wireless service might include caller ID and call waiting.

Service Required

Select if a service (used in the Integrated FieldService application) is required to install the product. The system makes the Service ID field available to allow you to select an appropriate service.

Use the Service component to define services (Set Up CRM, Product Related, FieldService, Services, Service).

See and *PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Setting Up Services," Defining Services.

Service ID

Select the ID of the service (used in the Integrated FieldService application) that would be used to install the product.

Billing Options

This section appears if the product definition is used in the communications solution. For example, the section is visible if the setID of the product is *COM01,* a system-delivered setID for the communications solution.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Using Order Capture and Service Management in the Communications Industry," Setting Up Product Definitions for 3G Wireless Services.

Communication

This section appears if the product definition is used to the communications solution.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Using Order Capture and Service Management in the Communications Industry," Setting Up Product Definitions for 3G Wireless Services.

Pricing

This section appears if the selected product type for the product definition is *Package.* For packages, indicate the pricing method.

at Top Level

Select to use the price that is defined on the Product Price page for the package price.

at Component Level Select to calculate the package price as the sum of the prices for each component in the package.

Note. When you select the at Component Level option, define the price for each component of the package using the Package Component Pricing page.

Regardless of the pricing option that you select, the total price for the product package is stored in the PROD_PRICE record.

Configuration Information

This section appears under one of these circumstances:

- Product type is *Package.*
- Product definition (standard product, service product or package product) is created for the communications solution. The system-delivered setID for the communications solution is *COM01*.

If the current product definition is for a configured product and the CRM system integrates with a supported configurator application, such as PeopleSoft Advanced Configurator, Oracle Configurator, or Lightly Configurator, use this section to specify the configuration attributes for the product definition.

Important! The configuration of multilevel product bundles is supported only by Advanced Configurator; as for non-multilevel products and packages, the configuration can be performed by any supported configurator applications.

This section provides descriptions of all fields that are used to support all configurator applications that the CRM system can integrate with. A portion of these fields appear based on the selected configurator application that you use.

Lightly Configured Select this option if the package is lightly configured or static.

This field is specific to product packages.

Schema Enabled and **Schema** Select this option if the package is not a multilevel product bundle but is configured using the Advanced Configurator. If selected, specify a schema to be used for the configuration of the package.

These fields are specific to product packages.

Not Configured Select if the product or service is not configurable and is not part of a multilevel product bundle. If selected, all fields that are specific to multilevel product bundles are hidden.

This field is specific to standard products or service products that are created for the communications solution.

Configured or **Configured Package**	Select if the product is a fully configured package. A fully configured package uses the product configurator at runtime and creates a package based on the selections for the configurator model. This field is specific to package products that are not created for the communications solution.
Schema or **Model**	Select the configuration schema that is used to configure the package. A configuration schema establishes the display, pricing, and configuration details for a specific configuration and what information to retrieve from the configuration models on the Configurator Server. This field is specific to package products that are not created for the communications solution.
Multilevel Bundle Component	This option is specific to creating product definitions for multilevel product bundles. See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Setting Up Multilevel Product Bundles," Setting Up Product Components.

See and *PeopleSoft Advanced Configurator 9.1 PeopleBook*, "Product Modeling with a Component Model."

Covering Rule Details

This section appears if the product type is *Commitment.*

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Setting Up Multilevel Product Bundles," Setting Up Product Components.

Lead Time

Future order functionality enables a user to place an order or a service management request that will occur in the future. The future-dated orders are queued in the CRM system and automatically resubmitted to fulfill the order or request. This approach improves performance by not submitting orders until they are due.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working with Future Dated Orders and Temporary Services."

Lead Time	Enter the lead time for a product in days. The lead time specified should be the amount of time needed to fulfill the product order. The default is 0, which indicates that the external system can perform the order with no delay. The lead time is taken into account when calculating the order execution date for future dated order. If the lead time is updated, no automatic update occurs for already submitted orders.

Inventory

This section appears only for products of type *Standard.*

Item ID

Enter an item ID to associate with the product. If you created the product from an item, the item ID on the Item Definition page appears here.

If the specified item is associated with configuration, the standard product can be configured through its product definition.

Note. Clear the Item Required check box on the Product Options page to save products without an item ID.

Agreements

This section appears only for products of type *Service Agreement.*

Agreement Template

Enter the name of the agreement template that is used to record the service agreements for a service product.

Examples of service product agreements include maintenance and repair agreements, product support agreements, cleaning service agreements, and replacement warranties.

Tax Parameters

This section appears for products of types *Service* and *Service Agreement.* The information that you enter in this group box determines how the service is classified for tax purposes.

Duration

This group box appears for products of type *Service* and enables you to enter the duration and frequency of the service.

See Also

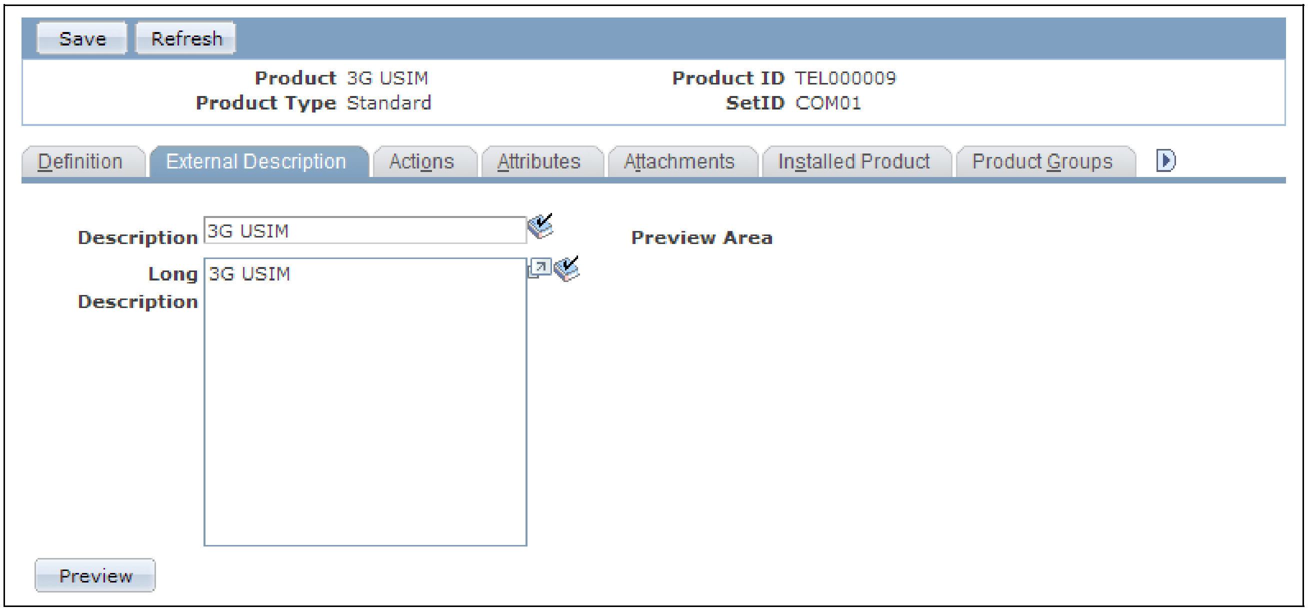
Chapter 7, "Setting Up Products," Establishing Product Prices, page 94

Chapter 3, "Setting Up Product Definitional Elements," Creating Product Definitional Elements, page 14

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Setting Up Multilevel Product Bundles," Setting Up Product Components

Defining External Product Descriptions

Access the Product Definition - External Description page (Products CRM, Product Definition, External Description).



Product Definition - External Description page

External Description and **Long External Description**

Enter short and long external descriptions for the product. The text can include any HTML tags except:

- <html> and </html>
- <title> and </title>
- <header> and </header>
- <body> and </body>

These main structure tags are unnecessary because they are included in the standard PeopleSoft-generated page.

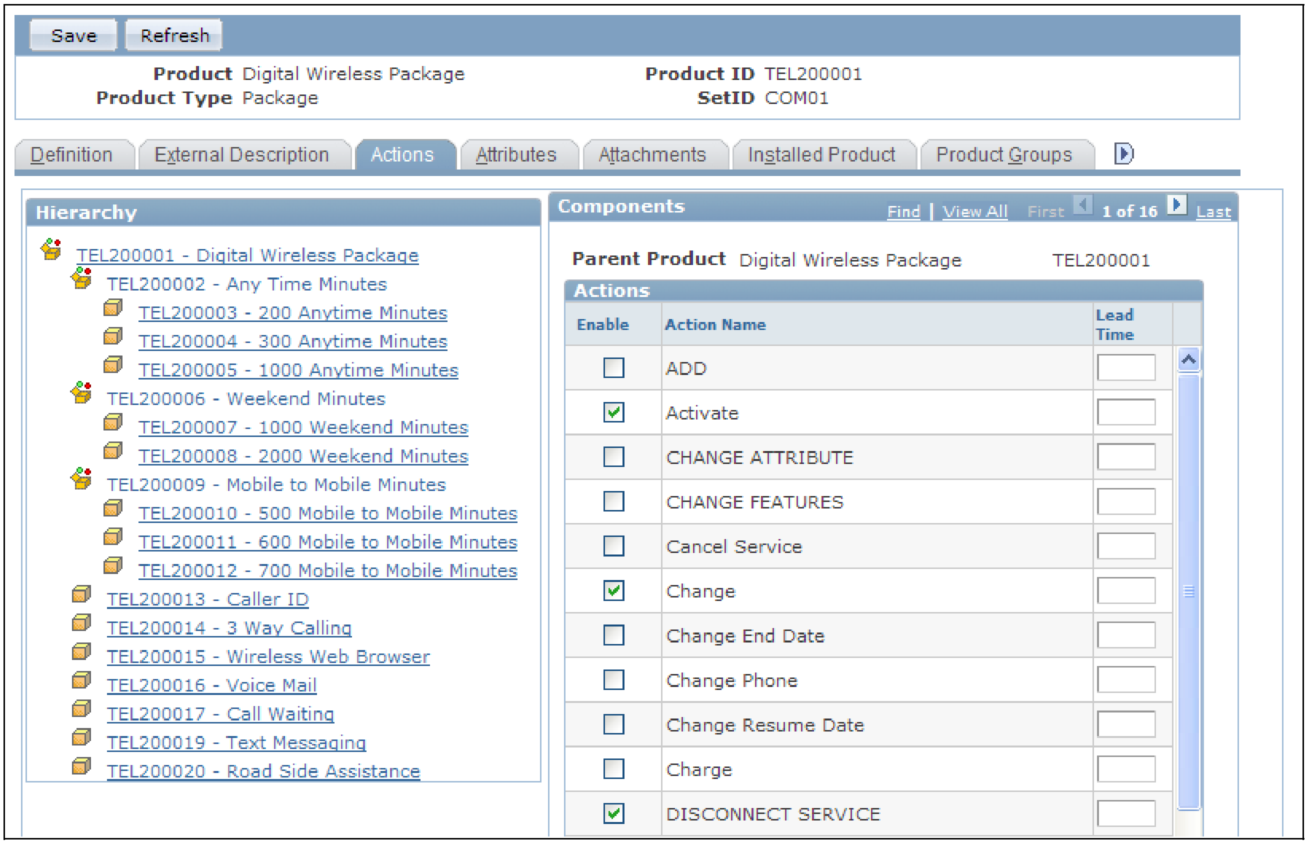
Note. Be sure that the HTML code follows proper HTML formatting rules.

Preview

Click to preview the short and long descriptions.

Defining Product Actions

Access the Product Definition - Actions page (Products CRM, Product Definition, Actions).



Product Definition - Actions page

This page enables you to add actions to a product and view the actions for the product. The actions that are available are determined by setID.

Hierarchy

This portion of the page shows the product package and its components. Clicking these links enables the user to upgrade, downgrade, or remove the component for that customer based on business rules. This hierarchy appears if the product is part of a package.

Components

This portion of the page changes based on the component selected. Initially, the page shows the actions available for the product package. When selecting a package component, the service features and available actions appear.

Actions

This portion of the page lists service actions that are defined for the setID to which the service product belongs.

Enable	Select to enable the corresponding action to be performed for the service product in a service management order.

Lead Time

Enter the lead time for each service action in days. The lead time is taken into account when calculating the execution date of the corresponding action. Suppose that the lead time of the *disconnect service* action for service product ABC is 2 days. When you add an installed service of ABC to a service management order on January 1 and select *disconnect service* as the line action, the system-calculated end date of the installed service is January 3.

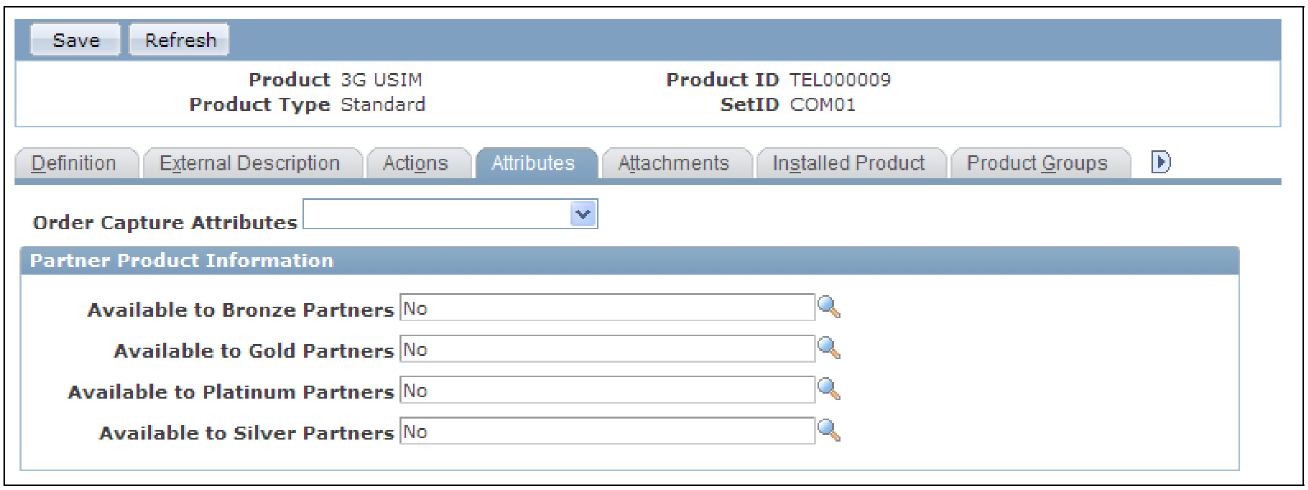
You can define a different lead time for each action associated with the product. The lead time specified should be the amount of time needed to perform the action on the external system for the product. The default is 0, which indicates that the external system can perform the change with no reasonable delay.

If no lead time is explicitly defined for an action, 0 days are assumed. Lead time is ignored for *Change End Date* and *Change Resume Date* actions.

If the lead time is updated, no automatic update occurs for already submitted orders.

Defining Product Attributes

Access the Product Definition - Attributes page (Products CRM, Product Definition, Attributes).



Product Definition - Attributes page

Order Capture Attributes

Select an option for the processing of order capture line attributes. The PeopleSoft Order Capture application uses these options to determine how it processes line attributes. Setting either the *Never has Attributes* or the *Always has Attributes* option increases performance because the attributes engine does not need to check for attributes when these options are set.

This field is not required. If left blank, *Conditionally has Attributes* is assumed to provide backward compatibility with existing functionality.

Possible values are:

- *Never has Attributes*

  Use this setting to indicate that product does not have order capture line attributes. Because attributes are never collected at order processing time for this product when this option is set, Order Capture performs better because it does not need to do the attributes calculation for the product. This increases response times when adding a product to an order and opening up existing orders.

- *Always has Attributes*

  Use this setting if the product has order capture line attributes. Attributes are always collected at order processing time for this product.

- *Conditionally has Attributes*

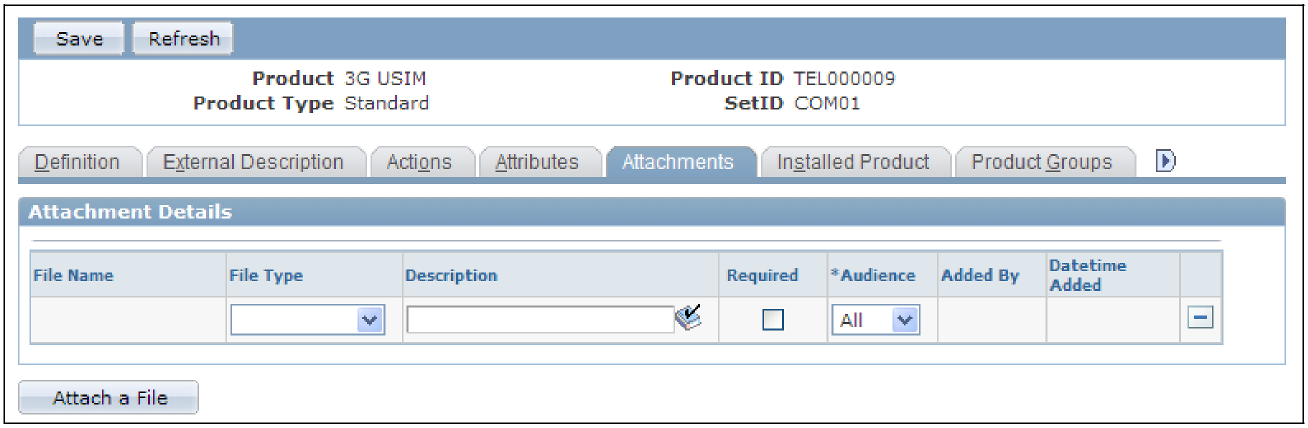
  Use this setting if the product sometimes has order capture order line attributes. Attributes are collected at order processing time under certain conditions that are based on the values of the order line. This conditional aspect of the attributes is determined at runtime by the attributes engine. Using this option can negatively affect response time.

Note. The specific attributes that you can enter on this page are defined at system installation.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Attributes."

Attaching Files to Product Definitions

Access the Product Definition - Attachments page (Products CRM, Product Definition, Attachments).



Product Definition - Attachments page

File Name Click to view the contents of the attachment.

File Type Select the attachment type. Options are*Prospectus*,*Disclosure*,*Literature*, and *White Paper.*

Required Select to indicate if the user must view the attachment before ordering the product or if the information is supplemental.

Warning! For product images uploaded to a DB2 platform, the maximum image size is 32K.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Working with Notes and Attachments," Adding Attachments to Notes

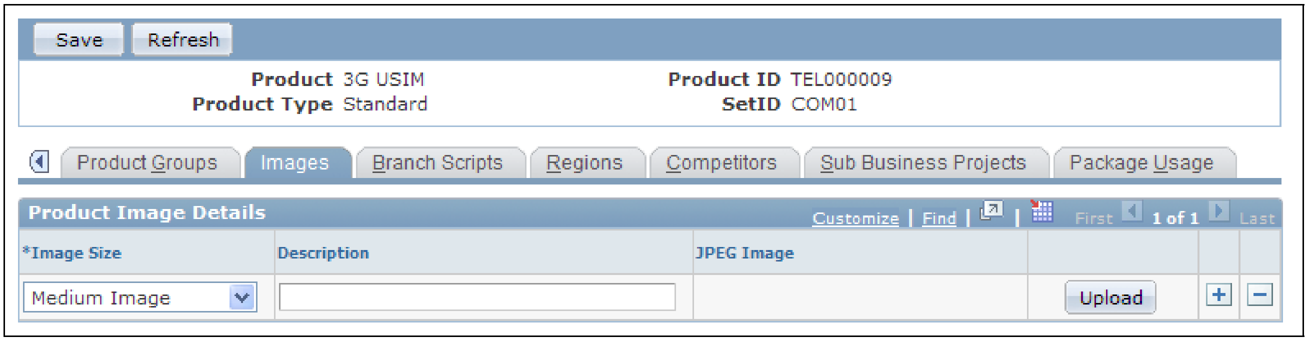
Defining Installed Product Rules

Access the Product Definition - Installed Product page (Products CRM, Product Definition, Installed Product).

See and Chapter 10, "Tracking Installed Products," Defining Creation and Update Rules for Installed Products, page 166. and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up Customer Self-Service," Setting Up Product Registration.

Attaching Images to Product Definitions

Access the Product Definition - Images page (Products CRM, Product Definition, Images).



Product Definition - Images page

Image Size

Select the size of the image that you want to associate with the product. Options are *Large Image, Medium Image, Small Image,* and *Zoom Image.* You can attach one image of each size.

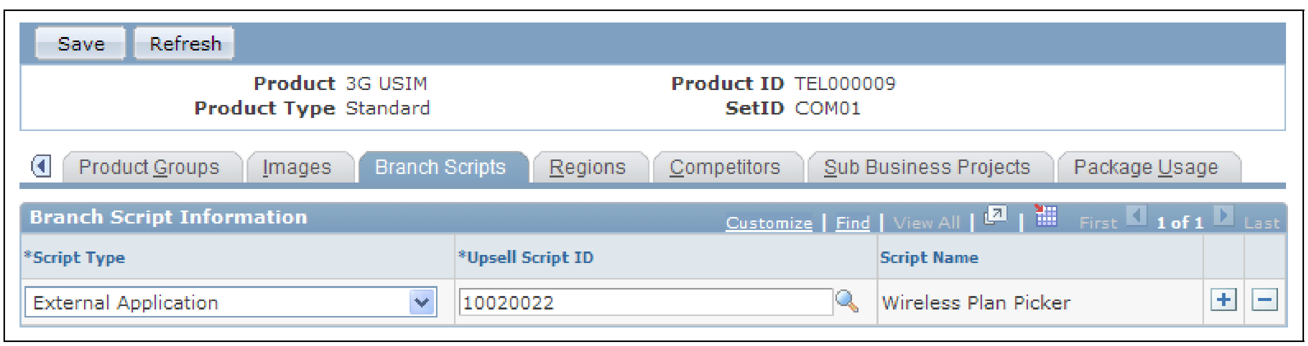
Browse

Click to locate, upload, and attach an image.

Note. You can upload and view only JPEG type images. The maximum size of the JPEG file depends on the database platform that you are using. Most systems can handle images up to 32 kilobytes. If you get an error message, click the Back button on your browser.

Associating Branch Scripts with Products

Access the Product Definition - Branch Scripts page (Products CRM, Product Definition, Branch Scripts).



Product Definition - Branch Scripts page

Script Type

Select a branch script type. Options are *External Application,Internal Application,* and *Upsell.* You can save only one script per type on this page.

Note. Up-sell scripts are used to launch a series of questions that enable a customer service representative to sell products on the phone. PeopleSoft CRM uses the internal and external scripts for financial services for the Sales Entry transaction.

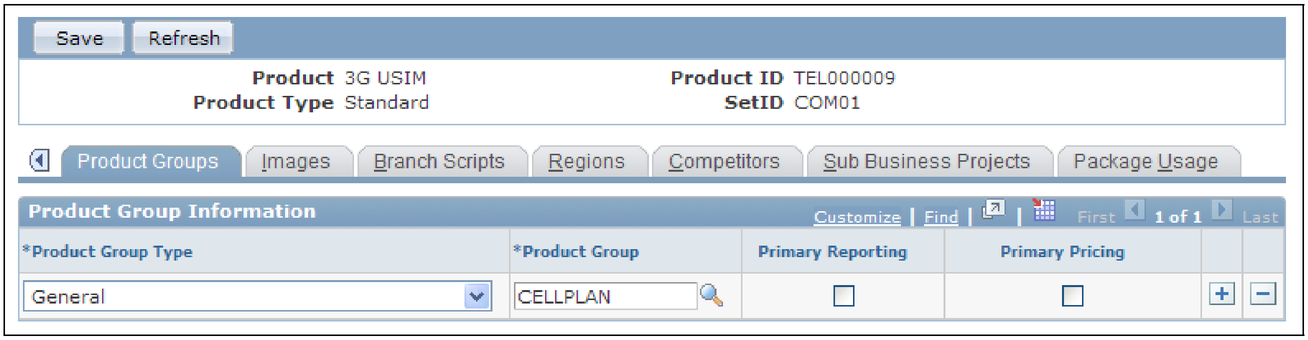
Script Name Enter the script ID number or the script name.

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Defining Scripts"

Adding Products to Product Groups

Access the Product Definition - Product Groups page (Products CRM, Product Definition, Product Groups).



Product Definition - Product Groups page

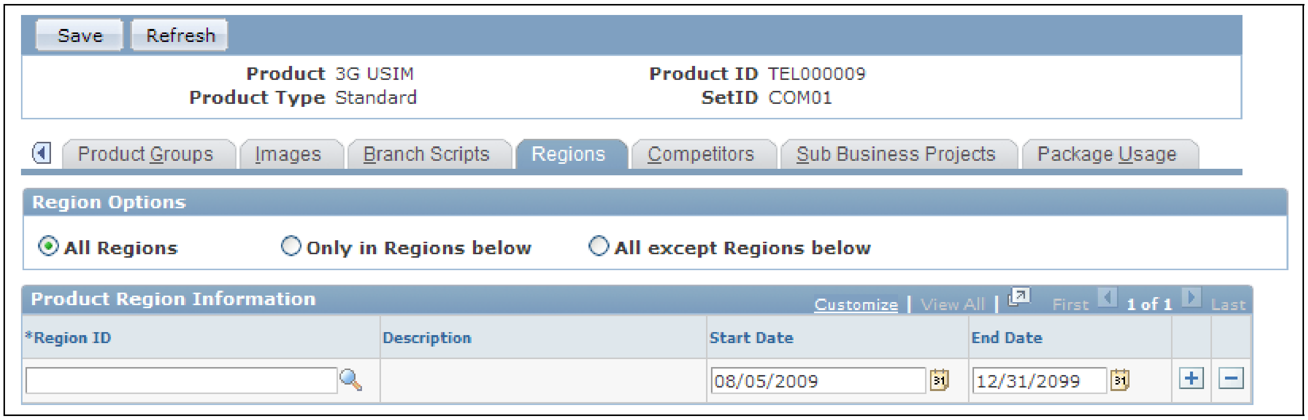
Product Group Type	Select a product group type. The system comes with predefined product group types that fall into the following categories: pricing, reports, sales buying agreements, transportation lead times, and taxes.
Product Group	Enter the number or name of a product group. A single product can belong to multiple product groups within each group type.
Primary Reporting	Select to indicate a single primary reporting product group when associating multiple groups with the *Reporting* group type. Statistics are distorted if a product appears on the report under every reporting group to which the product is linked.
Primary Pricing	Select to indicate a primary pricing product group if you've entered multiple groups of the *Pricing* group type.

See Also

Chapter 3, "Setting Up Product Definitional Elements," Defining Product Group Codes, page 19

Defining Product Availability for Regions

Access the Product Definition - Regions page (Products CRM, Product Definition, Regions).



Product Definition - Regions page

Region Options

All Regions

Select if the product is available to customers in all regions.

Note. If you select this option, the system disregards the regions that are associated with particular products.

Only in Regions below

Select to make the product unavailable in all regions except those that you specify.

All except Regions below

Select to make the product available in all regions except those that you specify.

Region ID

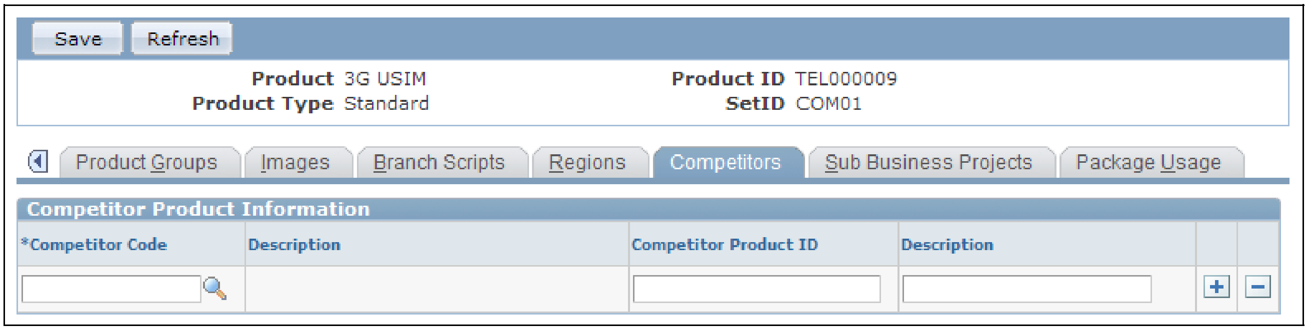
Enter one or more region codes if you select either the Only in Regions below option or the All except Regions below options.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up General Options," Setting Up Regions

Tracking Competing Products

Access the Product Definition - Competitors page (Products CRM, Product Definition, Competitors).



Product Definition - Competitors page

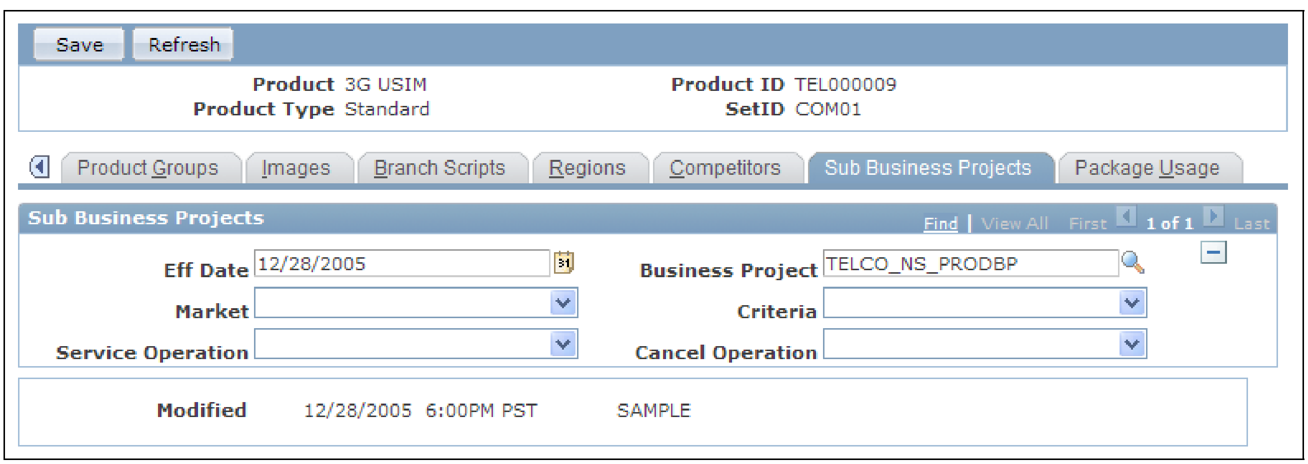
Competitor Code Enter a competitor code. You can create reports to perform analysis using competitor product information.

See Also

Chapter 10, "Tracking Installed Products," Defining Creation and Update Rules for Installed Products, page 166

Entering Sub Business Projects

Access the Product Definition - Sub Business Projects page (Products CRM, Product Definition, Sub Business Projects).



Sub Business Projects page

Enter information about the business projects that are associated with or used in conjunction with the product.

Assigning Product UOMs

To assign product UOMs, use the Product Unit of Measure (PROD_UOM) component.

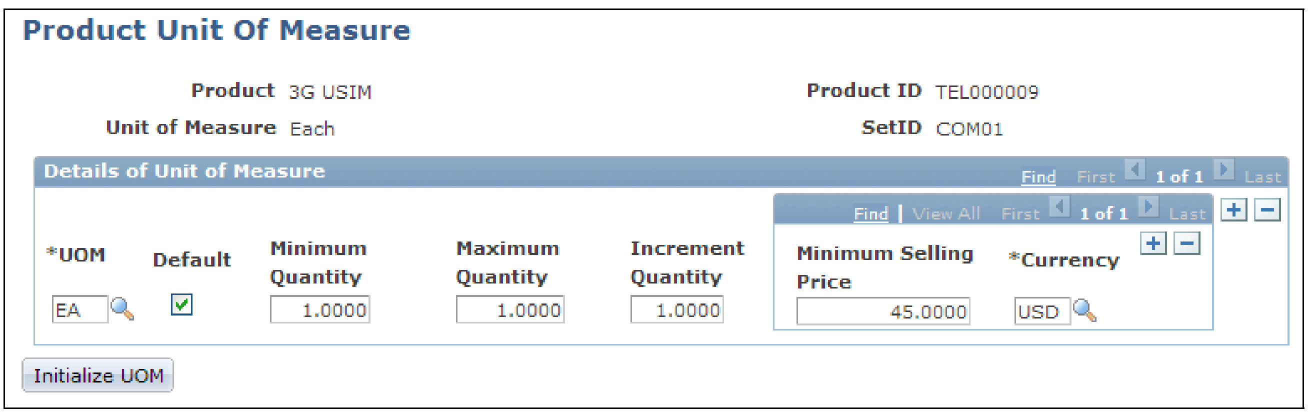
This section discusses how to assign UOMs.

Page Used to Assign Product UOMs

Page Name	Definition Name	Navigation	Usage
Product Unit Of Measure	PROD_UOM	Products CRM, Product Unit of Measure, Product Unit of Measure	Select the UOMs that apply to the product. Define minimum and maximum order quantities, valid order increments, and minimum selling prices for the product when sold by that UOM.

Assigning Product UOMs

Access the Product Unit Of Measure page (Products CRM, Product Unit of Measure, Product Unit of Measure).



Product Unit Of Measure page

Details of Unit of Measure

UOM (unit of measure) Enter a UOM that applies to sales order units for the product.

Minimum Quantity and **Maximum Quantity** Enter minimum and maximum order quantity fields. The order entry and quotation entry systems place the order line on hold if these limits are violated.

Increment Quantity Enter a value if a product can be sold only in specific increments.

See Also

Chapter 10, "Tracking Installed Products," Defining Creation and Update Rules for Installed Products, page 166

Defining Product Packages

To define product packages, use the Package Components (PRODKIT) component.

This section lists a prerequisite and discusses how to define product packages.

Prerequisite

Before you can define product packages, you must specify a package level in the product definition.

Product Packages can only have a UOM of *Each*. If you have not created a UOM for *Each*, navigate to Set Up CRM, Common Definitions, Unit of Measure and create an *EA* unit of measure

See Also

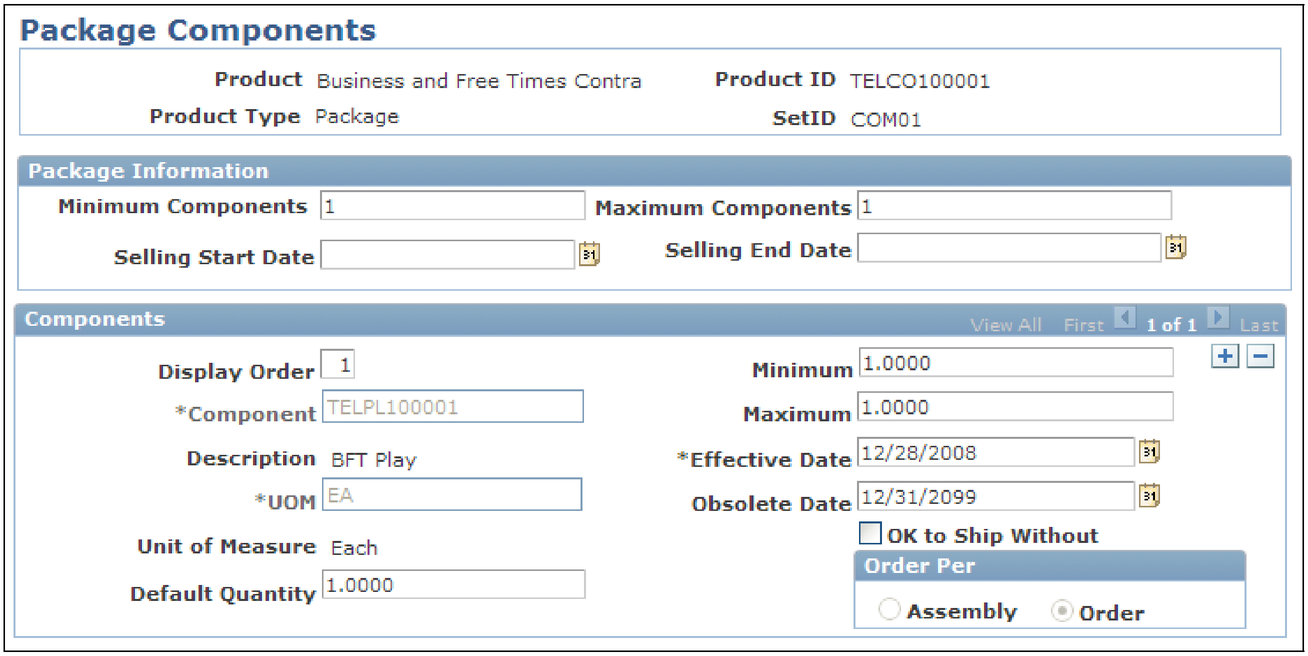
Chapter 7, "Setting Up Products," Defining Products, page 73

Page Used to Define Product Packages

Page Name	***Definition Name***	***Navigation***	***Usage***
Package Components	PRODKIT_SUMMARY	Products CRM, Package Components, Package Components	Define the components of a product package, specify the maximum and minimum number of optional or required components that a customer can select, and specify (for each component) the maximum and minimum quantity that a customer can order.

Defining Product Packages

Access the Package Components page (Products CRM, Package Components, Package Components).



Package Components page (1 of 2)

Package Components page (2 of 2)

Package Information

Minimum Components and **Maximum Components**	Enter the minimum and maximum number of components that a customer must purchase to complete an order.

Selling Start Date and **Selling End Date**

Enter the start and end dates of the period that the product package is available for sale.

These fields appear only for the top-level component of multilevel product bundles.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working with Orders for Multilevel Product Bundles," Understanding Selling Periods for Multilevel Product Bundles and Components.

Components

Products must be defined in the system before they can be added to product packages as components.

Display Order

Enter a number (1, 2, and so on) to indicate the order in which the component needs to be displayed in the package hierarchy. The component with the smallest order number is displayed first.

By default, this field is empty and the system displays components in the order they are entered.

Component

Enter the ID for each product or package that you want to add to the primary package. A package can consist of a number of individual products and secondary packages.

Default Quantity

Enter the default quantity for the component. This number must be between the minimum and maximum quantity for the component.

Order Per

Select whether the component quantity is per package (assembly) or per order. For example, suppose that you need to deliver a manual with a computer package and the customer orders several packages. To send one manual with each ordered package, select *Assembly.* To send one manual with the entire order (regardless of the number of packages in the order), select the *Order* field.

For multilevel product bundles, *Order* is selected by default and is in read-only mode.

Minimum and **Maximum**

Enter the minimum and maximum quantity that a customer can order per component. For example, if a particular component of a package is required but you can only order one, enter *1* in the Minimum field and *1* in the Maximum field. If a component is an optional part of a package but you can order a maximum of two, enter *0* in the Minimum field and *2* in the Maximum field.

Note. A minimum quantity of *0* means that the component is optional.

Effective Date

Enter the start date of the selling period for the product component.

This field is used by components of multilevel product bundles to define periods during which they are available for sale.

Obsolete Date

Enter the end date of the selling period for the product component.

This field is used by components of multilevel product bundles to define periods during which they are available for sale.

If you want to retire the current product component from the corresponding multilevel product bundle, update this field with the date after which the component is unavailable for sale as part of this product bundle. Note that updating the obsolete date of a product component in one multilevel product bundle does not mean the same update to all multilevel product bundles that the component is associated with. If you wish to retire a product component from multiple product bundles in one step, access the product definition of that component where you can set a new obsolete date in the product bundles that are selected.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working with Orders for Multilevel Product Bundles," Retiring Components from Multilevel Product Bundles.

OK to Ship Without

Select to ship the available product package without waiting for this component.

Package Hierarchy

This section displays the components of primary and nested packages using a tree structure.

Refer to the Setting Up Multilevel Product Bundles chapter for information on the package hierarchy that is specific to multilevel product bundles. Changes made to the multilevel product bundles (such as adding or removing product components) need to be exported to Advanced Configurator for updates to take effect.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Setting Up Multilevel Product Bundles," Setting Up Multilevel Product Packages.

Establishing Product Prices

To establish product prices, use the Product Price (PROD_PRICE) and the Package Component Pricing (PRODKIT_COMPS_PRC) components.

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

- Set prices for individual products or product packages by using top-level pricing.
- View prices for package components.

Understanding Product Pricing

The sources and definitions of product prices vary depending on how you define products. Note these differences:

- Prices for products that are created in PeopleSoft SCM or a third-party SCM system are defined by inventory business units unless the product is nonstockable (for example, a service such as installation).

  When you synchronize with a SCM system, you must enter the inventory business units into the Business Unit table in the PeopleSoft CRM system.

- Product definitions created in PeopleSoft CRM do not require the inventory business unit field.

  In PeopleSoft CRM, the inventory business unit is unknown when a product is ordered, and the system uses the lowest price from any inventory business unit associated with the product.

See Also

Chapter 4, "Defining Items," Understanding Item Definition in PeopleSoft CRM, page 33

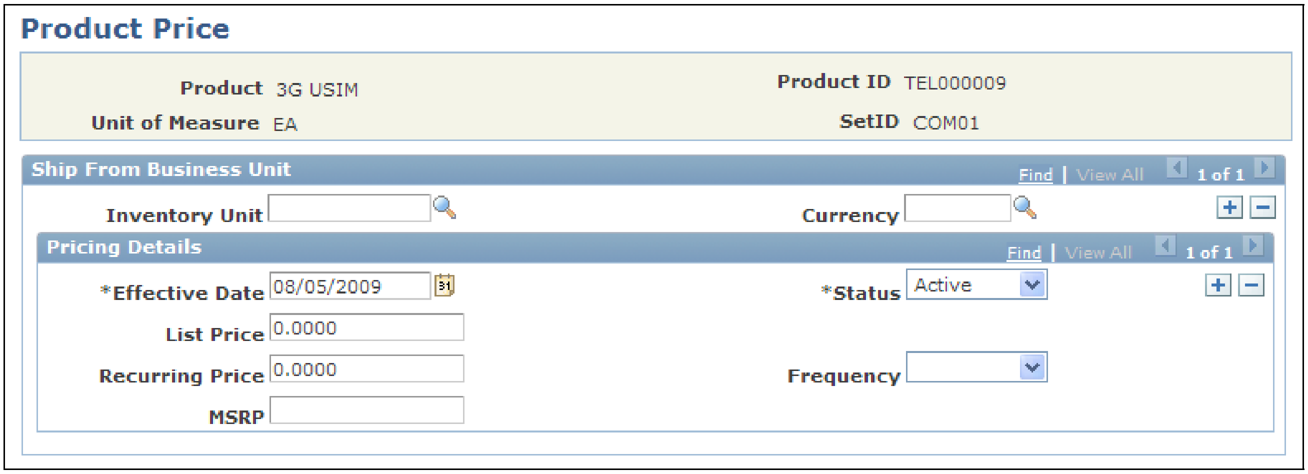
PeopleSoft Inventory 9.1 PeopleBook

Pages Used to Establish Product Prices

Page Name	***Definition Name***	***Navigation***	***Usage***
Product Price	PROD_PRICE	Products CRM, Product Price, Product Price	Set prices for standalone products and for product packages by using top-level pricing.
Package Component Pricing	PRODKIT_COMPS_PRC	Products CRM, Package Component Pricing, Package Component Pricing	View prices for each package component for product packages that uses component-level pricing.

Setting Prices for Individual Products or Product Packages by Using Top-Level Pricing

Access the Product Price page (Products CRM, Product Price, Product Price).



Product Price page

Ship From Business Unit

Inventory Unit	Enter the inventory business unit of the warehouse. This field is validated against the BUS_UNIT_TBL_FS table in PeopleSoft CRM. This field is optional for a noninventoried product. **Note.** Inventory business units are established in PeopleSoft SCM or the order fulfillment system. They are synchronized with PeopleSoft CRM using a business unit EIP.
Currency	Enter the currency that is used for the inventory business unit.

Pricing Details

List Price	Enter the product list price. The system applies price adjustments against the list price.
Frequency	Select the frequency of the recurring price.
Package Pricing	Click to view package component pricing details (available only for packages that are priced at the component level).

Viewing Prices for Package Components

Access the Package Component Pricing page (Products CRM, Package Component Pricing, Package Component Pricing).

Package Component Pricing page

This page lists the components of the package, the dates on which the component became part of the package, and the date it became obsolete in the package.

Currency

Select a value to represent the currency you want to use for the pricing component you are setting up.

You cannot enter information in the MSRP and Unit Cost fields until you enter a value in the Currency field.

List Price

This field displays the sum of the component prices.

Unit Cost and **MSRP** (manufacturer's suggested retail price)

These fields are for informational purposes only. CRM does not use them to initiate any processing. These values, if available, are sent to Order Management in PeopleSoft SCM.

See Also

Chapter 7, "Setting Up Products," Assigning Product UOMs, page 89

Chapter 7, "Setting Up Products," Defining Product Packages, page 91

Chapter 7, "Setting Up Products," Defining Products, page 73

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Currencies," Setting Up Currencies

Managing Product Relationships

This section provides an overview of product relationships, lists prerequisites, and discusses how to define product relationships.

Understanding Product Relationships

PeopleSoft CRM comes with a number of predefined relationship types that enable you to define relationships between products:

- Complement

  A complement is an accessory to another product. For example, a headset or carrying case might be a complement to a cell phone.

- Cross-sell

  A cross-sell is a product that enhances or extends the capabilities of another product. For example, a DVD player might be a cross-sell for a television.

- Up-sell

  An up-sell is a product that is superior to the product that the customer inquires about or orders.

- Product alternate

  A product alternate is offered in place of another. For example, suppose that the delivery time for a product does not meet the customer's needs. In that case, you might offer a product alternate.

  For a product to be considered an alternate product, you must link an item to it.

- Prerequisite

  A prerequisite is a product that is required for another product to function properly.

- Replacement product

  A replacement product is offered in place of another product that a customer orders if the original product is no longer available.

- Service feature

  A service feature for a product enhances the main product or service. For example, related service features for wireless service might include caller ID and call waiting.

- Agreement

  Relates products to all the service agreements that cover that product.

- Child Of

  A product is a child of another product if the former resides one level lower than the latter in a product package.

- SIM Card

  A communications service relates to a SIM card product using this relationship if the service (for example, 3G voice services) requires the presence of a SIM card.

- Sells

  A product (an atomic offer; commercial component in a multilevel product bundle) relates to a product (a functional component) using this relationship if the former represents and sells the latter in orders.

  This relationship is specific to multilevel product bundles. Refer to the see also reference for a list of product relationships that are specific to multilevel product bundles.

See Also

Chapter 7, "Setting Up Products," Defining Product Relationships, page 100

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Setting Up Multilevel Product Bundles," Product Relationships for Multilevel Product Bundles

Prerequisites

Before you define relationships between products, you must:

1. Review the available relationships that are delivered with the system.
2. Define additional relationships that are required by the business.
3. Specify optional relationship attributes.

See Also

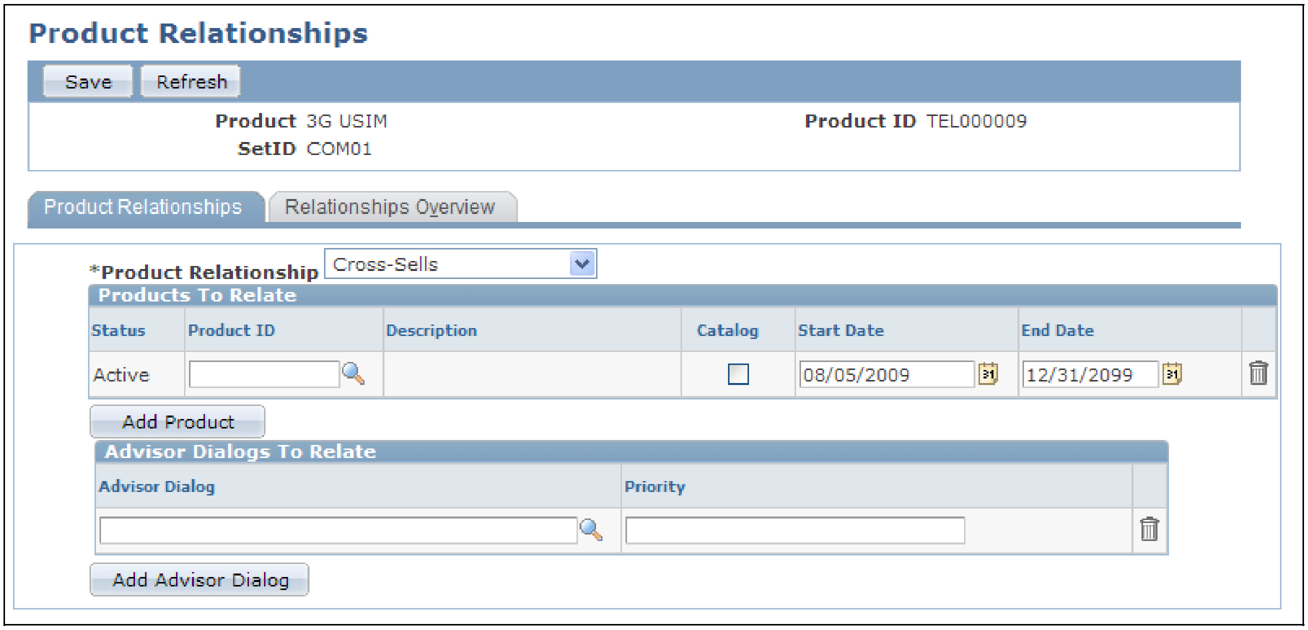
Chapter 3, "Setting Up Product Definitional Elements," Setting Up Product Relationship Codes, page 23

Pages Used to Manage Product Relationships

Page Name	***Definition Name***	***Navigation***	***Usage***
Product Relationships	PROD_RELATIONS	Products CRM, Product Relationships, Product Relationships	Define relationships between products.
Relationships Overview	PROD_REL_OVERVIEW	• Products CRM, Product Relationships, Relationships Overview • Click the View All link on the Product Relationships page.	View effective relationships between products.

Defining Product Relationships

Access the Product Relationships page (Products CRM, Product Relationships, Product Relationships).



Product Relationships page

Note. For a product to be considered an alternate product, you must link an item to it.

Products To Relate

Product Relationship

Select the relationship between the product in the Product field and the product in the Product ID field. The system may display a different set of fields based on your selection.

Note. Multilevel product bundles - product relationships that are set as *rule based* on the Product Relations Codes page are not available for selection in this field, as these types of product relationships are established at runtime during product configuration sessions in orders or service management orders.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Setting Up Multilevel Product Bundles," Product Relationships for Multilevel Product Bundles.

Product ID

Enter the ID of the product that you are relating to the product in the Product field.

Start Date and **End Date**

Enter the start and end dates of the relationship.

Advisor Dialogs To Relate

The system displays this group box if you select *Cross Sells* or *Up-Sells* as the product relationship. In these situations, you can associate advisor dialogs to the product and set the priority that the system will use to present multiple dialogs to an agent servicing a customer.

Entering Product Notes

This section lists a prerequisite and discusses how to enter product notes.

Prerequisite

Before you can associate a standard note with a product, you must define the note on the Standard Notes page.

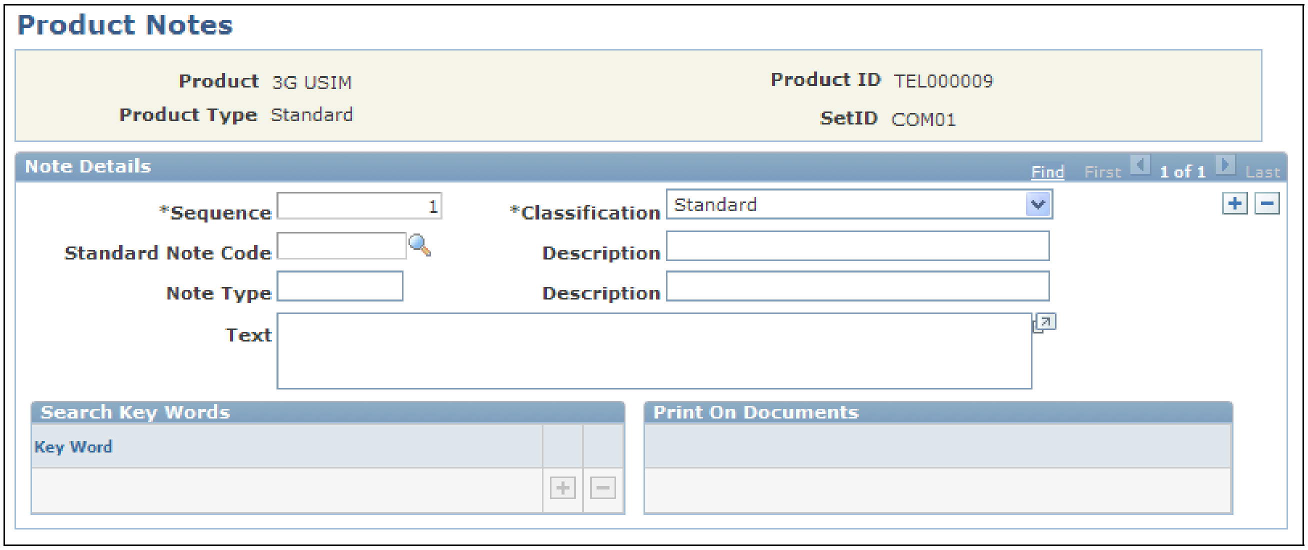
See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Working with Notes and Attachments."

Page Used to Define Product Notes

Page Name	***Definition Name***	***Navigation***	***Usage***
Product Notes	PROD_NOTE	Products CRM, Product Notes, Product Notes	Enter standard or custom product notes.

Entering Product Notes

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



Product Notes page

Sequence — Enter a sequence number to specify the order in which notes appear on documents.

Classification — Select *Standard* or *Custom.*

Standard Note Code — Enter the code of a standard note to associate with the product.

Note Type — Enter the note type for a custom note associated with the product.

Text — Enter the note text for a custom note. If you use a standard note, this field displays the predefined note text.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Working with Notes and Attachments," Setting Up Note Types

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Working with Notes and Attachments," Creating Standard Notes and Product Notes

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Working with Notes and Attachments," Entering and Viewing Notes

Chapter 8

Defining Options for Integration to the Asset Repository Module in PeopleSoft Financials

This chapter provides an overview of options that must be set to enable integration with PeopleSoft Financials.

Understanding Integration Options for the Asset Repository Module

Enabling integration between PeopleSoft Customer Relationship Management (CRM) and PeopleSoft Financial and Distribution Management (FDM) occurs on the Installed Product Configuration page, which is keyed by setID. Select the box labeled Enable Asset Integration with PeopleSoft Financials to allow integration. Also, when this check box is selected, the check box that controls the display of the installed asset serial ID is automatically selected because the PeopleSoft Financials application requires Serial ID values for all hardware assets.

The check box is the only setup option required for this integration other than the Product Mapping for Hardware Assets page and the full synchronization of manufacturer and asset subtype data.

However, other standard PeopleSoft integration-related setups are required. For example, you may need to configure the integration gateways, activate the relevant service operations, configure and activate routings, and set the message queues to running. These are all standard integration setup requirements.

Since the asset entries also include employee, department, and location values, the entries for these three types of data should also be in sync between the two systems. Therefore, you also must synchronize the existing messages for employee, department, and location in addition to synchronizing the new messages for manufacturers and asset subtypes.

See Also

Chapter 10, "Tracking Installed Products," Mapping and Reconciling Asset Information, page 222

PeopleTools 8.52: PeopleSoft Integration Broker PeopleBook

PeopleTools 8.52: PeopleSoft Integration Broker Administration PeopleBook

PeopleTools 8.52: Integration Broker Service Operations Monitor PeopleBook

Chapter 9

Creating Catalogs

This chapter provides an overview of catalogs and discusses how to:

- Create catalog display templates.
- Define catalog content and permissions.
- Search catalogs.

Understanding Catalogs

Catalogs are a single group of products or services that are marketed and displayed together because they share common criteria. PeopleSoft Customer Relationship Management (PeopleSoft CRM) 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 you define the contents that you want to organize and present according to the 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.

Catalogs in PeopleSoft CRM

You can access and search catalogs from different locations within PeopleSoft CRM, and functional areas within the CRM applications are dependent on catalog definitions. Catalogs can be used and searched by external customers who are purchasing products or services, internally by customer service representatives (CSRs) who need product information, and by others within an enterprise. Catalogs can use PeopleSoft Real-Time Advisor dialogs to help direct an end user to recommended products in the catalog. Catalogs and catalog data are accessible from within and outside of PeopleSoft CRM.

Internal Access

Catalog information is available from these internal sources:

- PeopleSoft Order Capture

  In PeopleSoft Order Capture, CSRs access catalog data and run catalog searches from the Entry form to obtain up-to-date information about products before they enter an order or provide quotes. In addition, access to products can be limited and validated against catalogs when a product is added to the order. CSRs can then use the product comparison tool, navigate to product details, and copy products from the search results back to the order entry form. Additionally, the CSR can use PeopleSoft Real-Time Advisor to retrieve catalog data.

  Note. Users can navigate to Product Search in PeopleSoft Order Capture and enter search criteria. They can also personalize the PeopleSoft CRM portal to display a product search pagelet (if the portal pack is installed). Once in a catalog, users can access PeopleSoft Real-Time Advisor, which retrieves catalog data based on answers to questions.

  See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working with Future Dated Orders and Temporary Services."

- PeopleSoft Sales

  From the Lead and Opportunity components users can drill into the Product Search component and perform keyword searches for products. Users can then use the product comparison tool, navigate to product details, and copy products from the search results back to PeopleSoft Sales.

External Access

Catalog information is available from these external sources:

- PeopleSoft Order Capture Self Service

  You can link to product detail pages from order lines, access and browse catalogs, and access PeopleSoft Real-Time Advisor, which retrieves catalog data and offers recommendations based on a user's response to Advisor dialogs.

- Customer registry or home page

  Users can browse and search the catalog. Once in a catalog, they can access PeopleSoft Real-Time Advisor, which retrieves catalog data and offers recommendations based on question-and-answer dialogs. Customers can also customize the PeopleSoft CRM portal to display a catalog search pagelet (if the portal pack is installed).

Prerequisites

Before you create catalog display templates or define the content of a catalog, you must define products using the Define Products component. In addition, because creating display templates and defining catalog content are interdependent setup steps, a catalog is not fully defined until you define both templates and content.

Note. Catalogs are limited to 1000 products per catalog.

To ensure that a user has access to catalogs, complete these setup steps:

1. Navigate to Set Up CRM, Security, CRM Application Security, Add membership list.

2. Enter *Order Capture Admin Mem List* in the Name field.
3. Enter *Order Capture Admin Membership List* in the Description field.
4. Click Next.
5. Select *Role* from the Security Object drop-down list.
6. Select *Multiple Members* in the Membership Applies to field.
7. Click Next.
8. Select *Order Capture Admin* in the Role Name field.
9. Click Finish.
10. Click Save.

Next:

1. Navigate to Set Up CRM, Security, CRM Application Security, Add security profile.
2. Enter *Order Capture Admin Profile* in the Name field.
3. Enter *Order Capture Admin Profile* in the Description field.
4. Click Add functional option group.
5. Select the Order Capture Admin check box.
6. Click Finish.
7. Click the Membership tab.
8. Click Add Membership List.
9. Select *Role* from the Security Object drop-down list.
10. Select *Multiple Members* in the Membership Applies to field.
11. Click Next.
12. Select the Order Capture Admin Mem List check box.
13. Click Finish.
14. Click Save.

See Also

Chapter 7, "Setting Up Products," Managing Product Relationships, page 98

Creating Catalog Display Templates

This section provides an overview of catalog display templates and discusses how to:

- Define catalog display pages.
- Define products and nested catalog display pages.
- Define product comparison pages.
- Define product detail display pages.
- Define featured product displays.
- Specify product search options.

To create catalog display templates, use the Catalog Template Definition (RO_DISPLAY_TEMPL) component.

Understanding Catalog Display Templates

You can create display templates to define the layout and organization of a catalog.

Note that this task is separate from defining the products that the catalog contains. You can then apply the same reusable templates to different product collections defined in Catalog Setup. Defining layout and presentation separately from content enables you to easily modify, update, and recombine both products and presentational formats to meet different user and display requirements.

Template Setup Procedures

Define display templates using the Catalog Template Setup component. Each page in this component controls the look and feel of one or more corresponding pages or displays in the online product catalog. The catalog display page is the initial page that users access. It contains a list of catalogs and associated images. The product display page is normally the second page that users access. It can display both products and nested catalogs (as well as associated images). Access this page from a link on the catalog display page.

Many users may want to replace the Browse Catalog functionality with the Find functionality as the default. To set up the Find functionality, refer to the section on Searching Catalogs.

See and Chapter 9, "Creating Catalogs," Searching Catalogs, page 133.

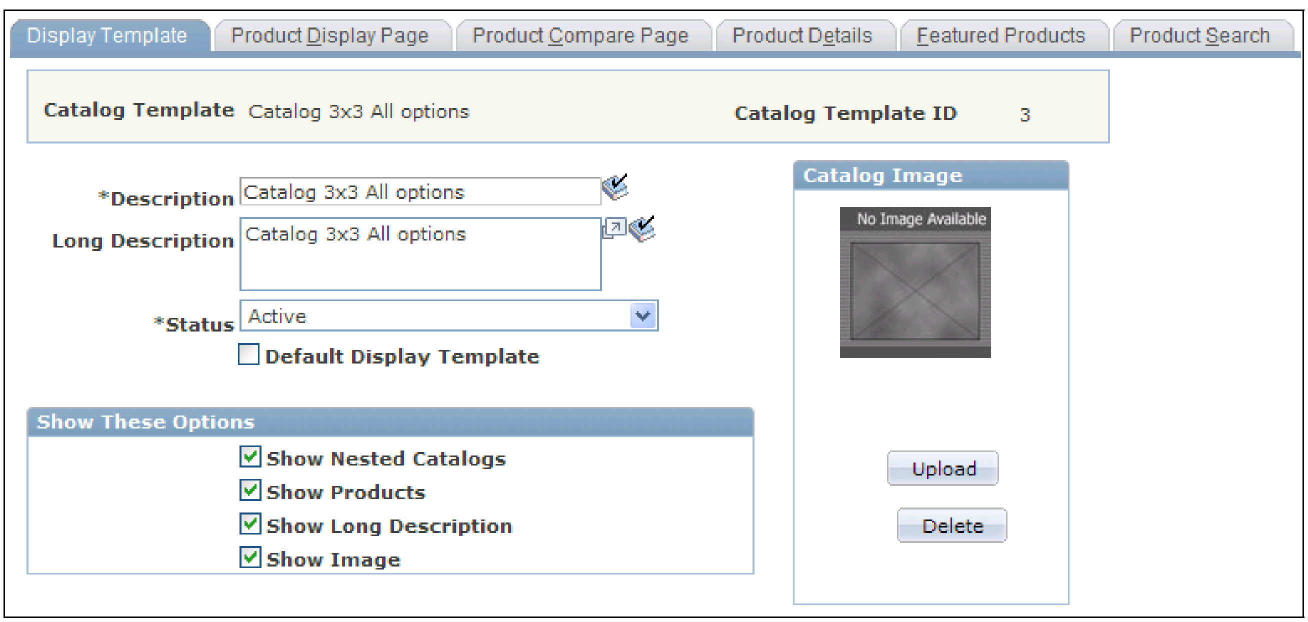
Pages Used to Create Catalog Display Templates

Page Name	*Definition Name*	*Navigation*	*Usage*
Display Template	RO_DISPLAY_TEMPL	Catalog Management CRM, Catalog Template Definition, Display Template	Define the look and feel of catalogs and product display pages in online catalogs.

Page Name	***Definition Name***	***Navigation***	***Usage***
Product Display Page	RO_PRODUCT_DISPLAY	Catalog Management CRM, Catalog Template Definition, Product Display Page	Define the look and feel of product display pages in online catalogs.
Product Compare Page	RO_PRODUCT_COMPARE	Catalog Management CRM, Catalog Template Definition, Product Compare Page	Define the look and feel of product comparison pages in online catalogs.
Product Details	RO_PRODUCT_DETAIL	Catalog Management CRM, Catalog Template Definition, Product Details	Define the look and feel of product detail pages in online catalogs.
Featured Products	RO_PRODUCT_FEATURE	Catalog Management CRM, Catalog Template Definition, Featured Products	Define featured products displays.
Product Search	RO_PRODUCT_SEARCH	Catalog Management CRM, Catalog Template Definition, Product Search	Control the visibility options from the product search.

Defining Catalog Display Pages

Access the Display Template page (Catalog Management CRM, Catalog Template Definition, Display Template).



Display Template page

Template Details

Description and **Long Description**

Enter a short and long description for the display template.

Status

Select whether the display template is *Active* or *Inactive.*

Default Display Template

Select to make this the default display template. PeopleSoft Order Capture uses the default template to determine the catalog page display when a display template is unavailable. For example, because users do not initiate product searches from within a particular catalog, how do you know which catalog product details definition to display when the user clicks a particular product after searching for it? In this case, the default catalog definition displays the product details. The same is true when a user accesses a particular product on an order. Similarly, the first page that users see when browsing catalogs is a list of catalogs. The catalog engine uses the default display template to determine whether or not to display the catalog images and long descriptions of these catalogs (catalog images appear if you select the Images check box on the Product Display Page page).

Note. Only one default display template is valid in the system.

Show These Options

Show Nested Catalogs

Select to have a catalog's secondary, nested catalogs (if any) appear on the product display page and to give users access to them.

Show Products

Select to have products or services that are associated with a catalog appear on the product display page and to enable users to access product details.

Show Long Description

Select to have the long description of a catalog appear. Otherwise, the system displays the short description from the Product Catalog page.

Note. Enter the long description of catalogs on the Product Catalog page.

Show Image

Select to show an image if a catalog has no image. You must upload the filler image on this page. Select the image representing a catalog on the Product Catalog page.

Note. If the catalog has an image and you want it to appear on the initial catalog display page, select Images on the default template's Product Display Page.

Catalog Image

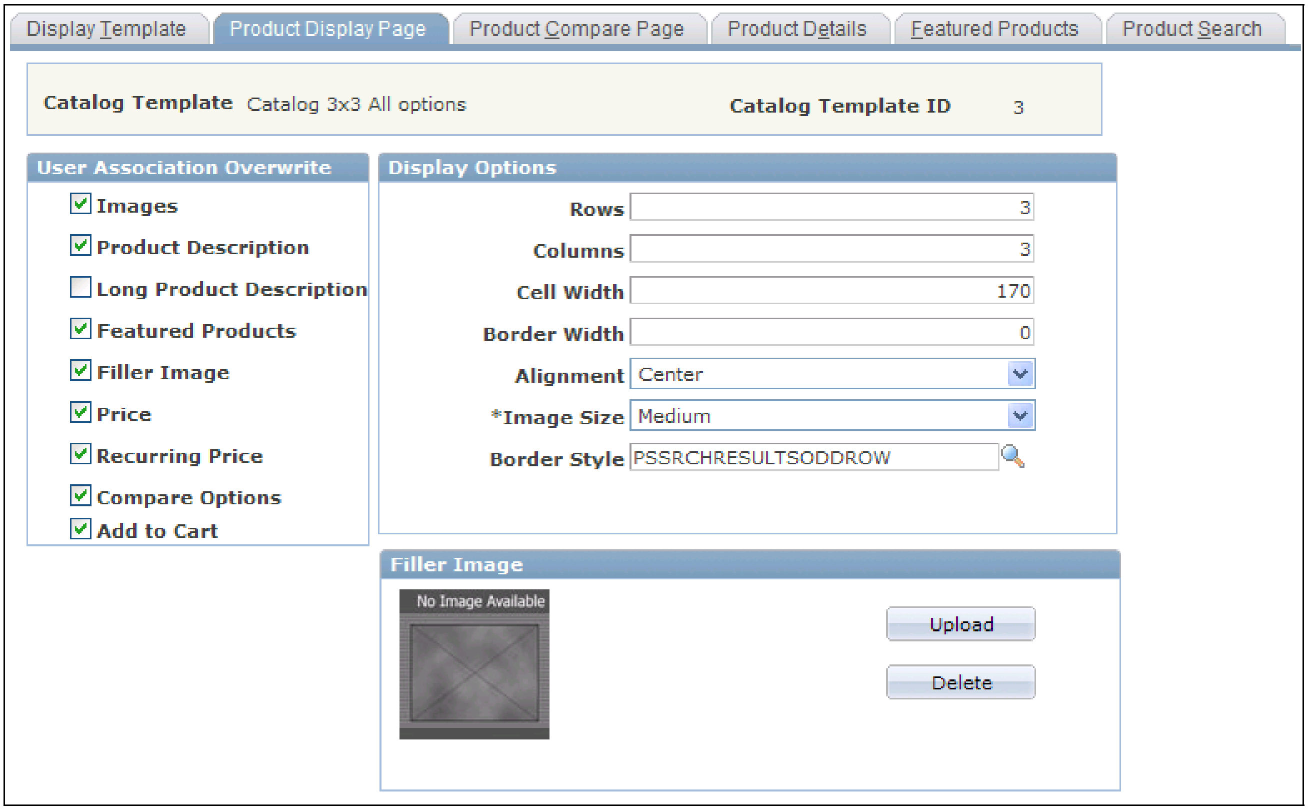
Upload

Click to upload a filler image to use when a catalog image is not available or to display no catalog image.

Delete Click to delete the filler image.

Defining Products and Nested Catalog Display Pages

Access the Product Display Page page (Catalog Management CRM, Catalog Template Definition, Product Display Page).



Product Display Page page

User Association Overwrite

Images Select to display product and nested catalog images on the catalog's product display page. These images will function as links to product detail and product display pages.

Note. Associate images with catalogs on the Product Catalog page. Associate images with products on the Images page in the Product Definition component.

Product Description

Select to show products' short descriptions on the product display page. These descriptions will function as links to product detail pages.

Note. Short descriptions come from the External Description page in the Product Definition component.

Long Product Description

Select to show products' long descriptions on the catalog's product display page.

Featured Products

Select to identify products that are marked as *Featured* on the catalog's product display page.

Note. Define the look and feel of featured products on the Featured Products page of the Catalog Template Setup component. Select actual products to be featured in a catalog on the Featured Products page of the Catalog Setup component.

Filler Image

Select to show a filler image on the catalog's product display page if a product has no image associated with it. You must upload the filler image on this page.

Price

Select to show product prices on the catalog's product display page.

Note. The product price is for single, one-time charges. Prices can come from price sets that are defined in the pricing engine, the List Price field on the Product Price page, or the List Price field on the Package Component Pricing page (if the product is a package that is priced at the component level).

Recurring Price

Select to show recurring prices on the second catalog display page.

Note. A recurring price is a price that is charged at periodic intervals, such as a magazine subscription fee. Define recurring prices on the Price List page.

Compare Options

Select to enable users to compare products (check boxes and a Compare button appear on the catalog's product display page).

Note. You cannot include nested catalogs in comparisons.

Add to Cart

Select to enable users to add products to their carts.

Display Options

Rows

Enter the number of rows of products or nested catalogs you want to appear on the catalog's product display page.

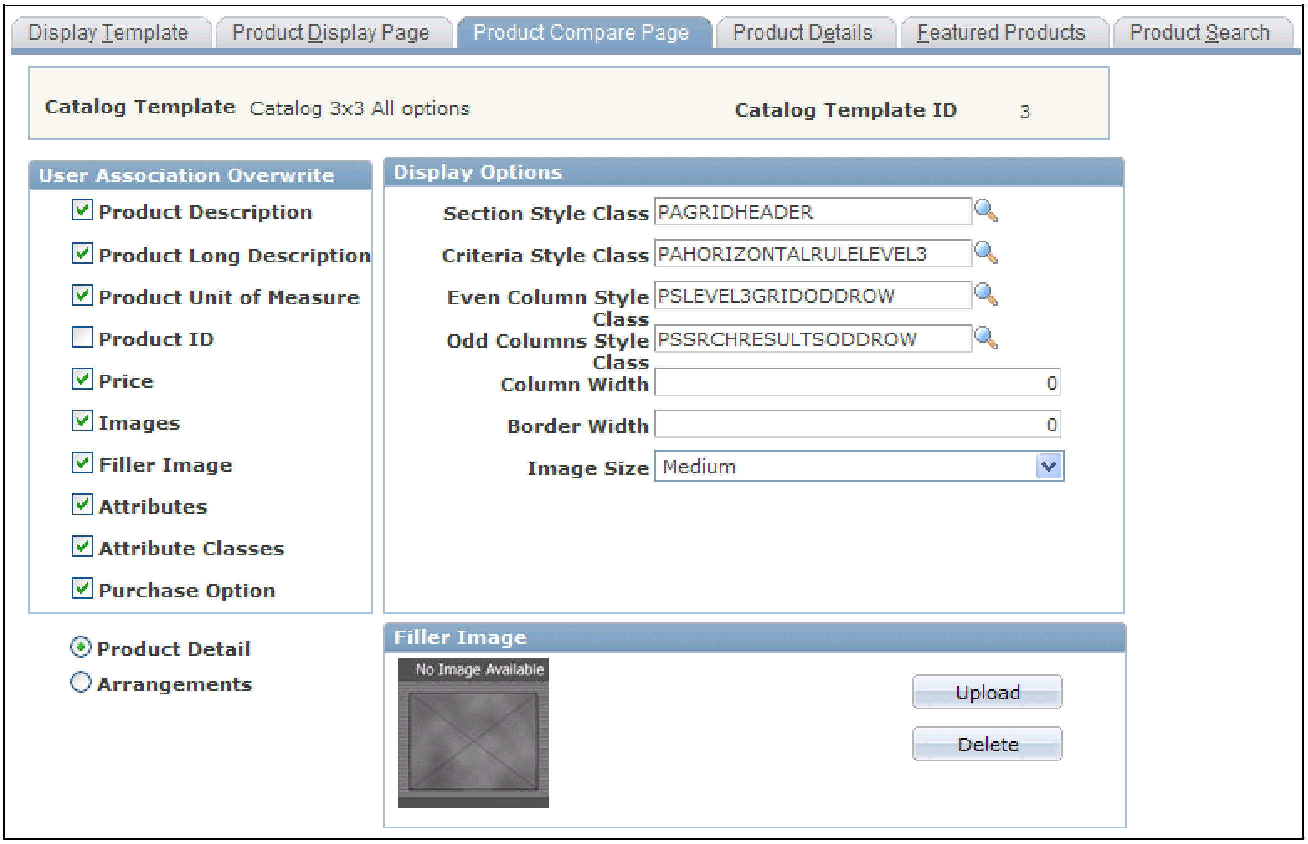
Columns	Enter the number of columns of products or nested catalogs you want to appear on the catalog's product display page.
Cell Width	Enter the cell width for a single nested catalog or product on the product display page. If you leave this field blank, the cells expand and shrink based on the contents, and each column expands to the largest width of any child cell.
Border Width	Enter the width of the cell borders.
Alignment	Select *Center*,*Right*, or *Left*.
Image Size	Select *Large*,*Medium*,*Small*, or *Zoom*. **Note.** Size refers to the Product Image page and the corresponding image sizes that are loaded there for each product. For nested catalogs, it uses the image (and size) that is loaded to the catalog.
Border Style	Select the style class of the cell borders. The background color of a cell's style class determines the cell's border color.

Filler Image

Upload	Click to locate and attach a filler image to use on the product display page when a product image is not available or to display no product image.
Delete	Click to delete the filler image.

Defining Product Comparison Pages

Access the Product Compare Page page (Catalog Management CRM, Catalog Template Definition, Product Compare Page).



Product Compare Page page

User Association Overwrite

Product Description

Select to show products' short descriptions on the catalog's product comparison page.

Note. Short descriptions come from the External Description page in the Product Definition component.

Product Long Description

Select to show products' long descriptions on the comparison page.

Note. Long descriptions come from the External Description page in the Product Definition component.

Product Unit of Measure

Select to show a product's default unit of measure (UOM) in a comparison.

Note. Set the default UOM on the Product Attributes by UOM page.

Product ID

Select to show the Product ID on the comparison page.

Price	Select to display product prices in a comparison. **Note.** The product price is for single, one-time charges. Prices can come from price sets that are defined in the pricing engine, the List Price field on the Product Price page, or the List Price field on the Package Component Pricing page (if the product is a package that is priced at the component level).
Images	Select to show product images on the catalog's comparison page. **Note.** Associate images with products on the Images page in the Product Definition component.
Filler Image	Select to use a filler image if a product has no image associated with it. You must upload the filler image on this page.
Attributes	Select to display product attributes in a comparison. Only attributes whose group usage type is *Information* appear in a product comparison. **Note.** Define product attributes on the Attributes page in the Define Products component. Define attribute group usage types on the Attribute Groups page.
Attribute Classes	Select to organize the attributes that appear in a comparison into attribute classes or types. For example, materials, dimensions, and patterns are different attribute classes.
Purchase Option	Select to add a Purchase This Product link to the catalog's comparison page. Users click this link to access the product's details page, where they will find the Add to Cart button (if enabled on the Product Details page).
Product Detail	Select to have users access the Catalog's Product Detail page when they navigate to a product on the Compare page.
Arrangements	Select to have users access the Financial Services Arrangements/Terms and Conditions page when they navigate to a product on the Compare page.

Display Options

Section Style Class	Enter the style class to use for the comparison page section headers.
Criteria Style Class	Enter the style class to use for the comparison page column that contains the elements to be compared (the leftmost column on the page).
Even Column Style Class	Enter the style class to use for the second (even-numbered) product column on the comparison page.

Odd Columns Style Class Enter the style class to use for the odd-numbered product columns on the comparison page.

Column Width Enter the width of the columns on the comparison page. If you leave this field blank, the columns expand and shrink based on their contents, and each column expands to the largest width of any child column.

Border Width Enter the width of the border between all of the columns and rows in the comparison table.

Image Size Select *Large*,*Medium*,*Small*, or *Zoom.*

Note. Size refers to the Product Image page and the corresponding image sizes that are loaded there for each product. For nested catalogs, it uses the image (and size) that is loaded to the catalog.

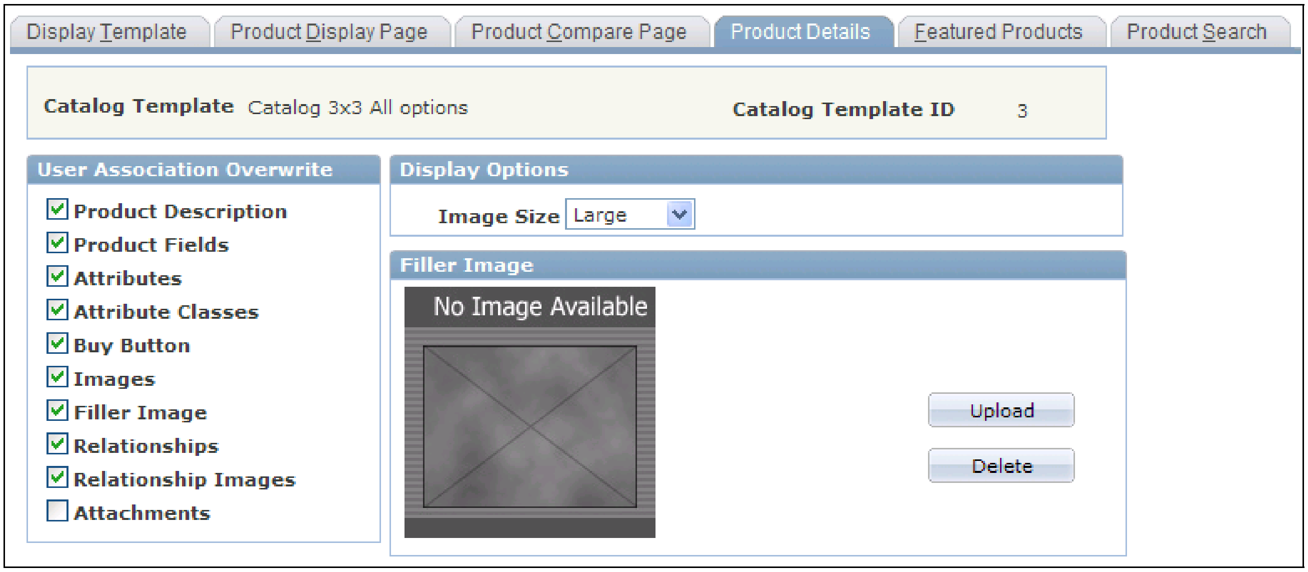
Filler Image

Upload Click to upload a filler image to use on the product display page when a product image is not available or to display no product image.

Delete Click to delete the filler image.

Defining Product Detail Display Pages

Access the Product Details page (Catalog Management CRM, Catalog Template Definition, Product Details).



Product Details page

User Association Overwrite

Product Description

Select to display product short descriptions on the catalog's product details page.

Note. Short descriptions come from the External Description page in the Product Definition component.

Product Fields

Select to display product fields on the catalog's product details page. These fields include Unit of Measure,Quantity, Price, and Recurring Price.

Attributes

Select to display product attributes on the details page. Only attributes whose group usage type is *Information* appear on the Product Details page.

Note. Define product attributes on the Attributes page in the Define Products component. Define attribute group usage types on the Attribute Groups page.

Attribute Classes

Select to organize the attributes that appear in a comparison of attribute classes or types. For example, materials, dimensions, and patterns are different attribute classes.

Buy Button

Select to enable the Add to Cart button and functionality on the Product Details page.

Images

Select to display product images on the catalog's Product Details page.

Note. Associate images with products on the Images page in the Product Definition component.

Filler Image

Select to use a filler image if a product has no image associated with it. Upload the filler image on this page.

Relationships

Select to show product relationships on the Product Details page. In PeopleSoft CRM, products can be related to other products as cross-sell or up-sell opportunities, function as alternates or replacements for other products, complement other products, or be defined as prerequisites for the purchase of other products. These relationships can appear on the Product Details page to promote additional sales opportunities.

Note. Define relationships between products on the Product Relationships page.

Relationship Images

Select to display images of related products on the catalog's product details page.

Attachments

Select to enable the Attachment functionality.

Display Options

Image Size

Select *Large, Medium, Small,* or *Zoom.*

Note. Size refers to the Product Image page and the corresponding image sizes that are loaded there for each product. For nested catalogs, the system uses the image (and size) that is loaded to the catalog.

Filler Image

Upload

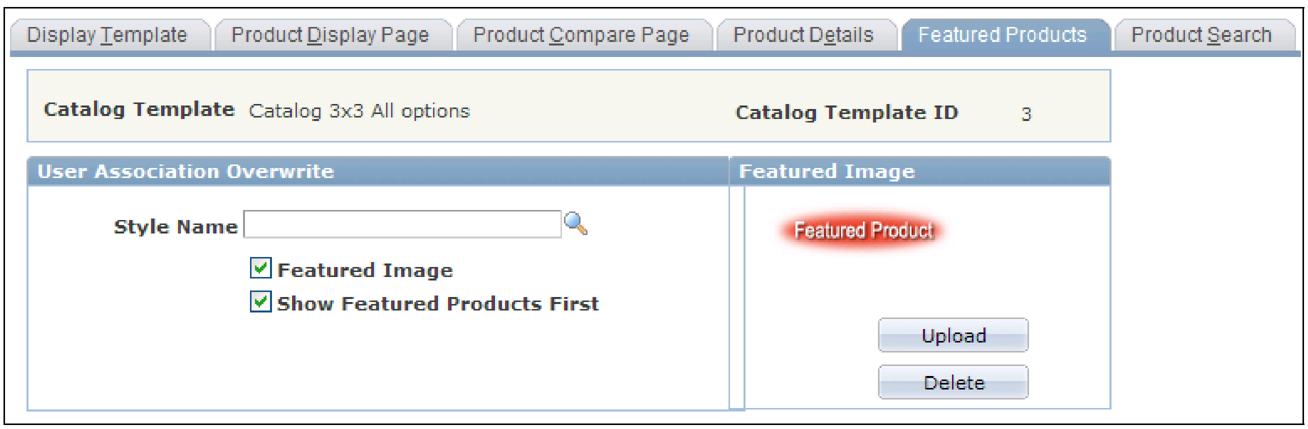
Click to upload a filler image to use when a product image is not available or to display no product image.

Delete

Click to delete the filler image.

Defining Featured Products Displays

Access the Featured Products page (Catalog Management CRM, Catalog Template Definition, Featured Products).



Featured Products page

User Association Overwrite

Style Name

Enter a cell style to use for featured products.

Featured Image

Select to have the image that is uploaded on this page appear on catalog display pages when a product is marked as *Featured.*

Show Featured Products First

Select to have all of the products that are marked as *Featured* appear before other products. Use this option to show promotional products to users before they see other products.

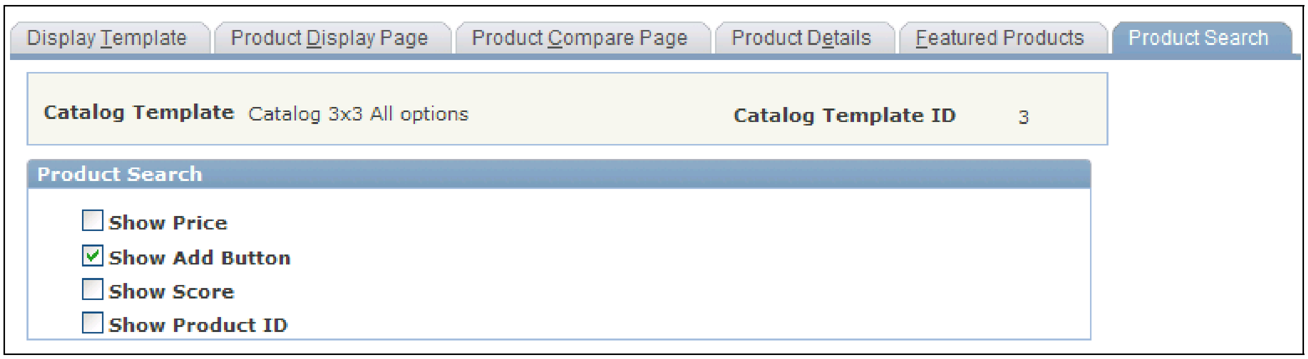
Featured Image

Upload — Click to upload a filler image to use when a product image is not available or to display no product image.

Delete — Click to delete the filler image.

Specifying Product Search Options

Access the Product Search page (Catalog Management CRM, Catalog Template Definition, Product Search).



Product Search page

Product Search

Show Price — Select to show the price of the products in Search Results on the Product Search page.

Show Add Button — Select to show the Add button in Search Results on the Product Search page.

Show Score — Select to show the Score in the Search Results area on the Product Search page.

Show Product ID — Select to show the Product ID in the Search Results area on the Product Search page.

Defining Catalog Content and Permissions

This section provides an overview of catalog content and permissions and discusses how to:

- Define catalog IDs and populate catalog caches.
- Clone catalogs.

- Define product associations.
- Set up security memberships.
- Define recommendations.
- Create nested catalogs.
- Identify featured products.

To define catalog content and permissions, use the Catalog Definition (RO_CATALOG) component.

Understanding Catalog Content and Permissions

This section discusses:

- Catalog generation.
- Direct association.
- Business rule association.
- Security memberships.

Catalog Generation

PeopleSoft CRM enables you to generate catalogs dynamically based on rules that you define online. These rules determine which products appear in catalogs, who can access catalogs, and which products are featured in catalogs. You can also link products to catalogs and define user access by direct association using product IDs and user IDs.

Direct Association

You can associate both standard and featured products with catalogs by Direct association. Direct association enables you to link specific product IDs to one or more catalog IDs. Only products associated with a catalog ID can appear in the catalog.

Business Rule Association

Business rule association enables you to define a rule that is based on field values such as product brand, product category, and product group as well as other product attributes. For example, you could define a rule that specifies that only a specific product brand can appear or be featured in a catalog. If you want, you can include more than one attribute and value pair in a single product association rule. For example, you could use these two associations to create a catalog for Company X laptops and Company Z workstations:

Condition 1: Product category = laptop and brand = Company X.

or

Condition 2: Product category = workstation and brand = Company Z.

Each condition in the rule involves an association between two values, a product category and a brand, which are joined together using the where clause operator *and.* However, the relationship between conditions is based on the where clause operator *or*, meaning that any product that satisfies either condition 1 or condition 2 appears in the catalog.

Note. The system interprets rule conditions that are defined on the same row or scroll to be joined by the *and* operator and conditions that are defined on different rows or scrolls to be joined by the *or* operator.

Security Memberships

In PeopleSoft CRM, you can control user access to catalogs by specifying security memberships.

Security memberships enable 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 *Premier Customers* that includes all of the premier customers in their system and a catalog named *Premier Catalog* that is specially prepared for premier customers. By specifying the *Premier Customers* membership list in the catalog definition, the catalog can provide special pricing and recommendations exclusively for this group of users. Similarly, you can define a membership list that includes all customers who are in the electronics industry in the California region and associate the list with a catalog of electronic products that is specific to the California region.

Note. Users cannot access catalogs that are defined with a security membership of the object type *Role.* Security membership lists for catalogs must contain Security objects of the types *Customer,Person,* or *Partner* for users to access the catalog.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences," Defining Application Security

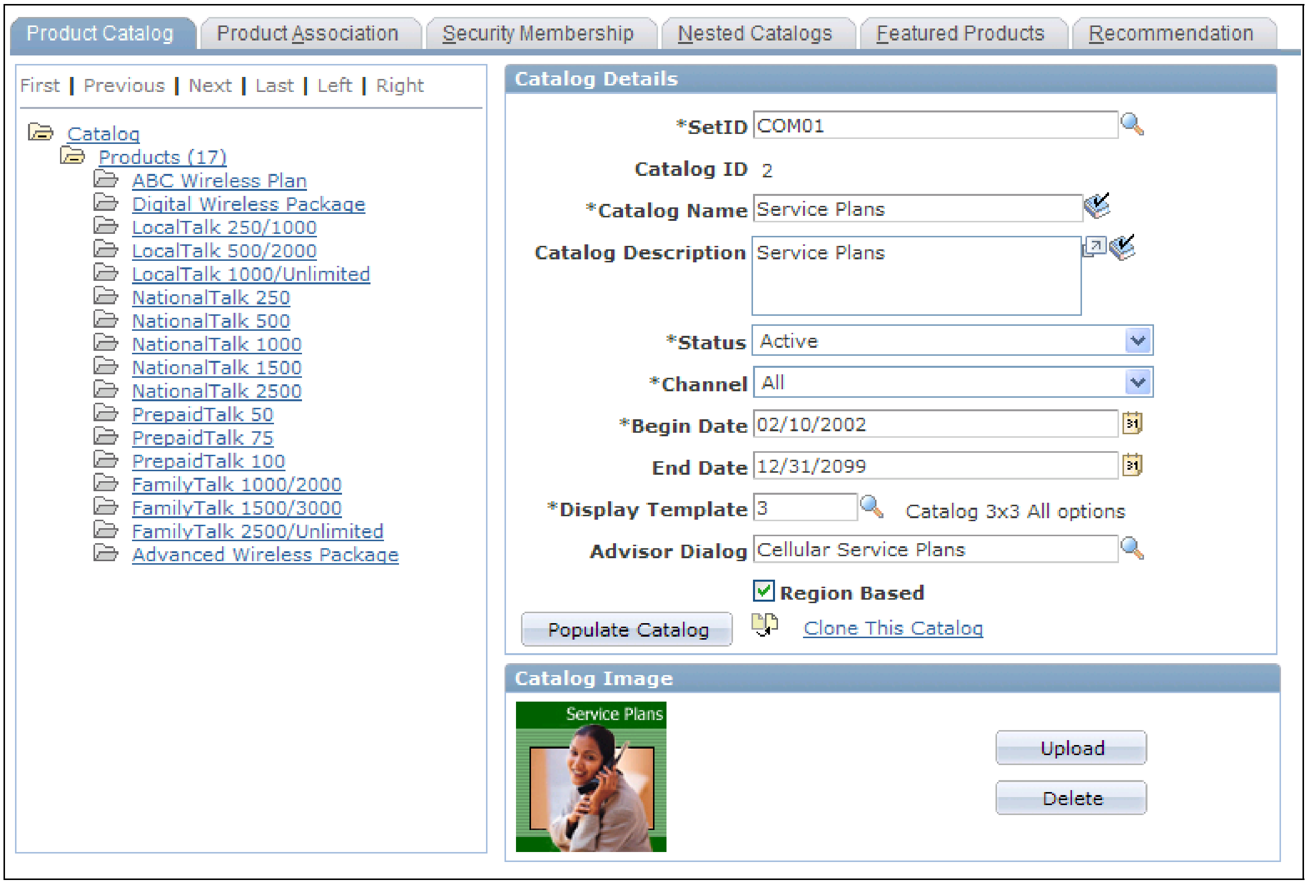
Pages Used to Define Catalog Contents and Permissions

Page Name	***Definition Name***	***Navigation***	***Usage***
Product Catalog	RO_PRD_CATALOG	Catalog Management CRM, Catalog Definition, Product Catalog	Define catalog IDs and select default display templates to control the look and feel of catalogs; populate catalog cache tables.
Clone a Catalog	RO_CAT_CLONE	Click the Clone This Catalog link on the Product Catalog page.	Create copies of catalogs.
Product Association	RO_PRD_ASSOCIATION	Catalog Management CRM, Catalog Definition, Product Association	Define catalog content by direct or business rule association.

Page Name	*Definition Name*	*Navigation*	*Usage*
Security Membership	RO_CAT_SEC	Catalog Management CRM, Catalog Definition, Security Membership	Define user access and experience by defining membership lists.
Membership List	RSEC_MEMBER_SMRY	Click the View Details link on the Security Membership page.	Define memberships to enable visual access to catalogs.
Nested Catalogs	RO_NEST_CAT	Catalog Management CRM, Catalog Definition, Nested Catalogs	Link nested catalogs to a main catalog.
Featured Products	RO_FEATURED_PRD	Catalog Management CRM, Catalog Definition, Featured Products	Select products to be featured in catalogs.
Recommendations	RO_RECOMMENDATION	Catalog Management CRM, Catalog Definition, Recommendation	Select to show or not show recommendations.

Defining Catalog IDs and Populating Catalog Caches

Access the Product Catalog page (Catalog Management CRM, Catalog Definition, Product Catalog).



Product Catalog page

Catalog Tree Details

You can expand folders in the catalog tree as follows:

- Expand the main Catalog folder in the catalog tree to display subfolders for products.
- Expand the Products folders to see individual products in the catalog.

Each folder in the tree has a link associated with it. Inside the Products folder are links for individual products:

- Clicking the Catalog link refreshes the tree display.
- Clicking the Products link accesses the Product Definition component and lets you define products (logged on users must have access to the product definition to do this).
- Clicking the link of any individual product accesses the product definition of the selected product.

Catalog Details

Catalog ID

If you are adding a new catalog, the system asks you to enter a SetID and Catalog Identification Number before you access this page.

If the catalog number already exists, the system displays this message: *The value you tried to add already exists. Select it below if you'd like to update it, or specify a new value in the fields above.*

To create a new catalog, enter a number in the Catalog Identification Number field that does not already exist. Catalogs do not use the PeopleSoft CRM autonumbering feature.

Catalog Name and **Catalog Description**

Enter a name for the catalog. This name will appear in the catalog list. You can make the description appear on the catalog display page by selecting Show Long Description on the Display Template page.

Channel

Select which channels to use to define access to catalogs. Values are:

All: Select if the catalog will be accessed externally using the web as well as internally (for example, by CSRs).

Internal: Select if the catalog is for internal use only.

Web SS (web self-service): Select if the catalog is for external access using the web (for example, by customers who are purchasing products or services through a self-service transaction).

Note. The channel that is being accessed depends on the portal that is being browsed. As delivered, the customer portal is considered external, and the employee portal is considered internal.

Begin Date and **End Date**

Enter dates that specify the period during which the catalog is active.

Display Template

Enter a display template to control the layout of products as well as the information and options that appear in the catalog. You can override the display template on the Security Membership page, per membership.

Note. You must first define the display templates using the Catalog Template Setup component.

Advisor Dialog

Associate a PeopleSoft Real-Time Advisor dialog with the catalog. When you associate a dialog with a catalog, users see a Go to Product Advisor link that launches the Advisor. Dialogs can be based on different catalog-user combinations, so that different dialogs can be targeted to different users. You can define a default dialog at the catalog level as well as an optional dialog at the user level on the Security Membership page, per membership.

Note. PeopleSoft Real-Time Advisor dialogs are a series of questions and answers that constitute a recommendation experience. Advisor recommends products based on a user's responses. These responses can be weighted by the Advisor engine to emphasize certain recommendations over others based on user segments. In PeopleSoft Order Capture Self Service, users can add products or services recommended by Advisor to their shopping carts. If users exit an Advisor dialog, they are returned either to the catalog page in the self-service application or to the Order Capture entry form (in the case of the CSR).

Region Based

Select if the catalog is regional (sensitive to the geographical area of the user). When users accesses regional catalogs, they are prompted for a region, which could be the zip code of the ship-to area of service or installation, a state, a city name, or some other location, depending on how you define regions during implementation. This information can be used to dynamically hide products in the catalog that are not available in a particular area.

Note. To define the regions in which specific products are available or unavailable, use the Regions Page in the Product Definition component. Product Sales regions are used for product filtering.

Note. You can also attach regional restrictions at the user level as opposed to the product level. Geographic regions are used for user associations. To enforce regional restrictions use the security membership setup. For example, a membership might include all customers in the *Southeast region.*

Populate Catalog

Click to populate cached information on which the tree in the left pane of the page is based. The tree refreshes automatically with the new information based on the catalog refresh.

Note. This button calls the RO_CAT_PUSH1 Application Engine program, which populates the cache tables storing catalog data.

Clone This Catalog

Click to access the Clone a Catalog page and clone the current catalog.

Catalog Image

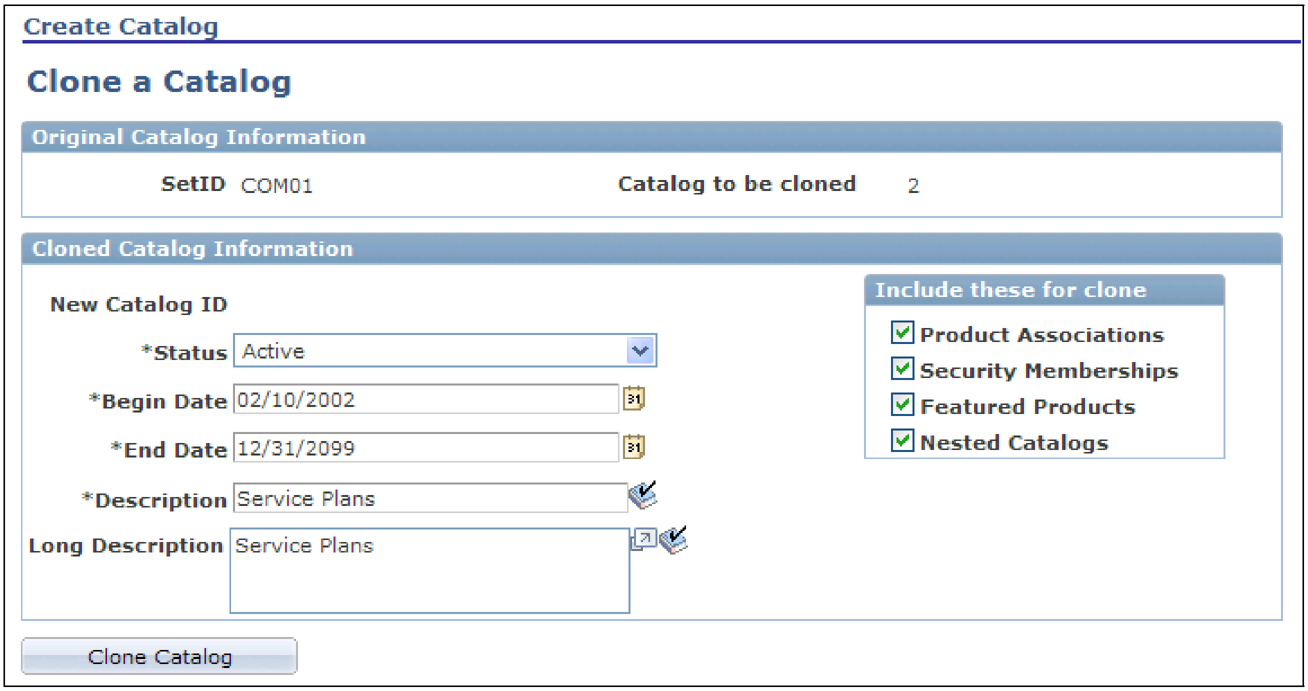
Upload

Click to upload an image to represent the catalog. You determine whether this image appears in online catalogs on the Display Template page.

Delete Click to delete the image.

Cloning Catalogs

Access the Clone a Catalog page (click the Clone This Catalog link on the Product Catalog page).



Clone a Catalog page

Original Catalog Information

Catalog to be cloned Displays the name of the catalog that is being cloned.

Cloned Catalog Information

New Catalog ID Displays the new ID that the system assigns to the cloned catalog once you click Clone Catalog.

Begin Date and **End Date** Enter dates that specify the period during which the new catalog is active.

Description and **Long Description** Enter a description, which appears in the catalog list. You can make the long description appear on the catalog display page by selecting Show Long Description on the Display Template page.

Include these for clone

Product Associations

Select to save all of the product associations from the original catalog to the new catalog.

Security Memberships

Select to save all of selected membership lists from the original catalog to the new catalog.

Featured Products

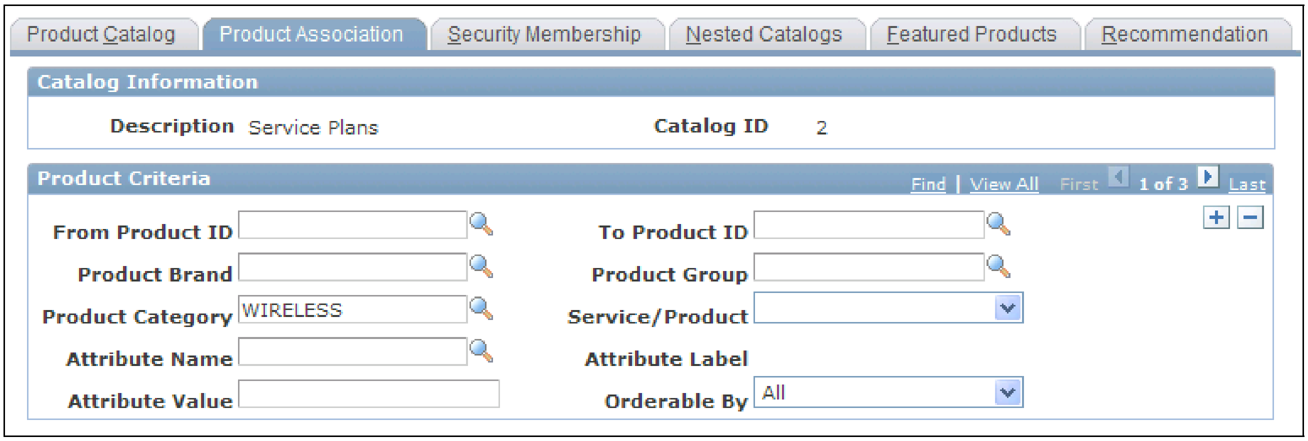
Select to save all of the featured product rules from the original catalog to the new catalog.

Nested Catalogs

Select to save all of the nested catalogs from the original catalog to the new catalog.

Defining Product Associations

Access the Product Association page (Catalog Management CRM, Catalog Definition, Product Association).



Product Association page

Note. You should populate the catalog by clicking the Populate Catalog button on the Product Catalog page after defining product associations.

From Product ID and **To Product ID**

Enter product IDs to link products to catalogs by direct association. To link an individual product rather than a range of products to a catalog, enter the specific product ID in the From Product ID field and leave the To Product ID field blank. Create new rows for each product or product range that you want to associate with the catalog.

Product Brand

Enter a brand to create a business rule association based on that brand. For example, you could select only Brand A product for inclusion in a catalog.

Note. Define brands on the Product Brand page.

Product Group

Enter a product group to create a business rule association based on that group. For example, you could include in the catalog all products in the product group *Dishwashers.*

Note. Add products to product groups on the Product Groups page in the Product Definition component.

Product Category

Enter a product category to create a business rule association based on that category. For example, you could include in the catalog only products that fall within the category *Trains.*

Note. Define product categories on the Product Category page.

Attribute Name and **Attribute Value**

Enter an attribute name on which to base a business rule association, and enter the attribute value. For example, you could use the *Material* attribute to select items for inclusion in a catalog and specify that you want to include all products in the product group *Shoes* that are made of 100 percent leather (in this case, the attribute value would be *Leather*).

Note. Define attributes using the Attributes component. Only attributes that are associated with products are available here. Associate products with attributes on the Attributes page in the Define Products component.

Attribute Label

Displays the description of the chosen attribute.

Service/Product

Enables you to create a business rule association based on the definition of products as *Service* or tangible type *Products.*

Note. Define products as service or tangible type products on the Definition page in the Product Definition component.

Orderable By

Select a value to create a business rule association based on whether a product is universally available or available only to businesses or consumers. For example, you may want the catalog to include only products selected for businesses. Values are:

All: Select to include products in the catalog that are available to both customers and businesses.

Consumer: Select to include products in the catalog that are available to consumers.

Business: Select to include products in the catalog that are available to businesses.

Note. Set the Orderable By status of products on the Definition page in the Product Definition component.

Conditional Clauses in Business Rule Associations

When you create business rule associations on the Product Association page, the conditions in the rule can be related to one another in one of two ways:

- Using *and* operators

  When conditions are joined by *and* operators, all individual conditions in the rule must be met before a product can be included in a catalog. For example, if you specify that the product brand *Company X* should be included in the catalog and that within this brand, only products in the product category *Laptop Computers* should be included, you are defining a rule based on an *and* operator. In this example, the product must be both a Company X brand and a laptop to be included in the catalog.

- Using *or* operators

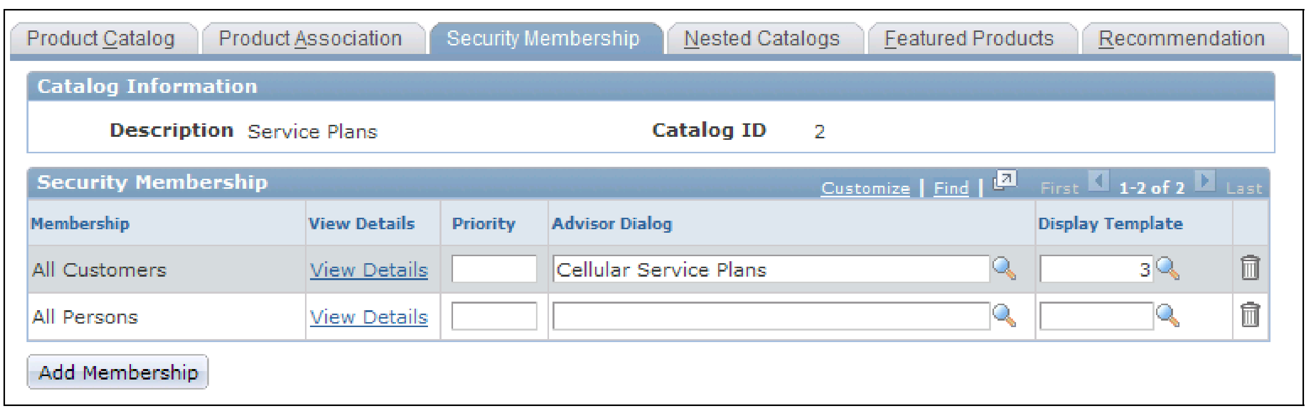
  When conditions are joined by *or* operators, only one condition in the rule must be met before a product is included in a catalog. For example, if you specify that any product with the product brand *Company X* should be included in the catalog, as well as any computer in the product category *Workstation* (regardless of brand) should be included, you are defining a rule based on an *or* operator. In this example, if the product is either a Company X brand or a workstation, it will be included in the catalog (only one condition needs to be satisfied).

To associate conditions within a rule using the *and* operator, define all the conditions as part of the same scroll or row. For example, assume that you want to include only Company X workstations in a catalog. To do this, enter a product brand of *Company X* (condition 1) and a product category of *Workstation* (condition 2), but do not create a new row for each condition.

To associate conditions using the *or* operator, define each condition on a different scroll or row. For example, assume that you want to include all Company X products in the catalog (condition 1), as well as any workstation, regardless of brand name (condition 2). To do this, enter a product brand of *Company X,* create a new row on the Product Association page (click the Add Row button), and define the second condition by enter a product category of *Workstation.*

Setting Up Security Memberships

Access the Security Membership page (Catalog Management CRM, Catalog Definition, Security Membership).



Security Membership page

Note. If you do not define a membership list, no one will have access to the catalog.

Membership Displays membership lists that are associated with a particular catalog.

View Details — Select to view the membership details.

Priority — Enter a number to indicate the order or priority in which you want the advisor dialogs and display templates to appear. For example, if advisor dialogs and display templates were defined for three different membership lists and a user belonged to more than one membership list, then the number you enter in this field would determine which advisor dialog and display template an agent would use in conjunction with the catalog.

Advisor Dialog — Enter a PeopleSoft Real-Time Advisor dialog to override the default dialog that is selected at the catalog level (on the Product Catalog page). This dialog applies to users who meet the access requirements that you define.

Note. Advisor dialogs belong to PeopleSoft Real-Time Advisor.

Display Template — Enter a display template to override the default template that is selected at the catalog level (on the Product Catalog page). This template applies to users who meet the access requirements that you define.

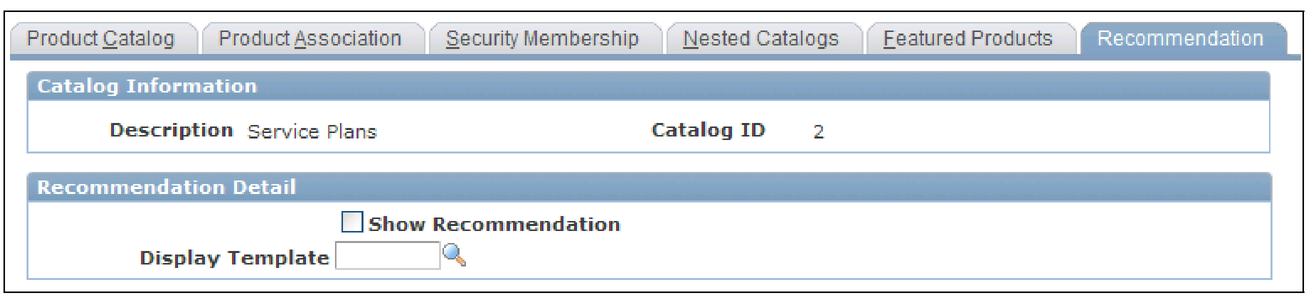
Add Membership — Select to add a new membership to the catalog security.

See Also

PeopleSoft Real-Time Advisor 9.1 PeopleBook

Defining Recommendations

Access the Recommendation page (Catalog Management CRM, Catalog Definition, Recommendation).



Recommendation page

Recommendation Detail

Show Recommendation — Select to show recommendations at runtime when users are looking for products on the Find Products page.

Display Template — Select a display template to be used for presenting recommendations.

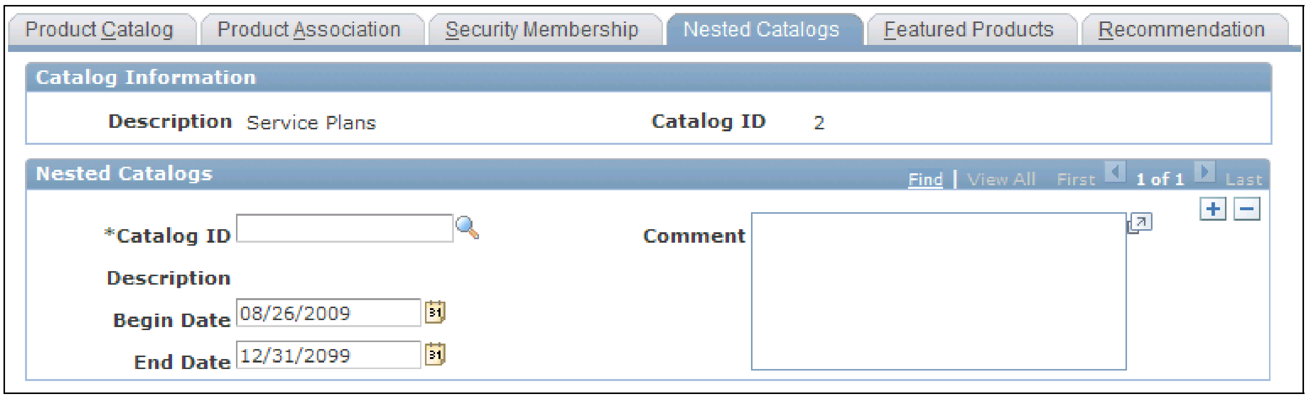
See Also

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

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Working With Order Capture Self Service," Selecting Products

Creating Nested Catalogs

Access the Nested Catalogs page (Catalog Management CRM, Catalog Definition, Nested Catalogs).



Nested Catalogs page

Catalog ID

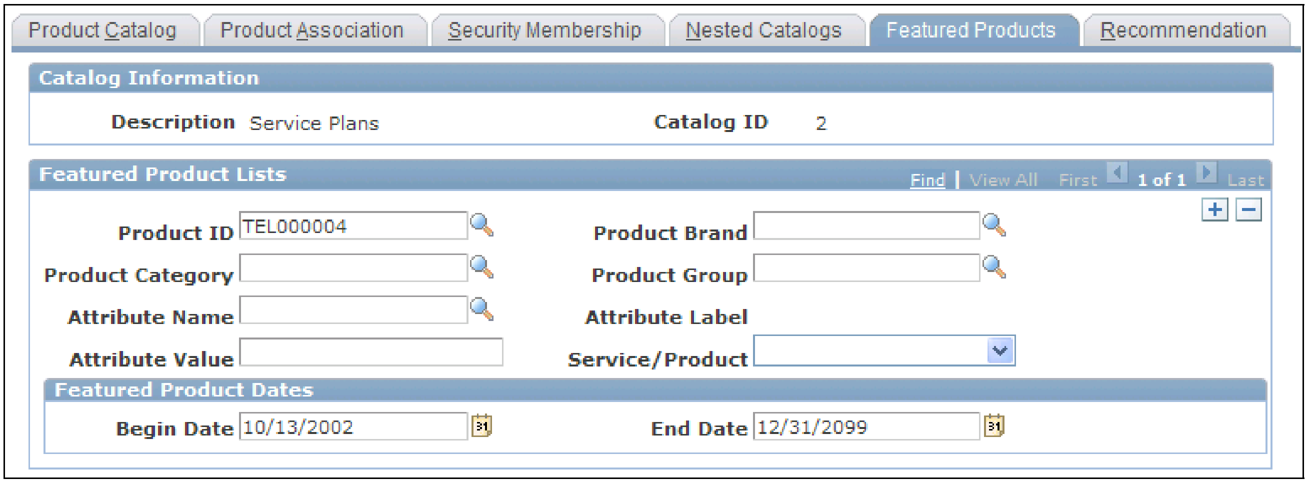
Enter the ID of the catalog that you want to nest within the main catalog that appears at the top of the page.

Begin Date and **End Date**

Enter the dates for which the relationship between the nested catalog and the main catalog is valid.

Identifying Featured Products

Access the Featured Products page (Catalog Management CRM, Catalog Definition, Featured Products).



Featured Products page

Note. A product cannot be featured in a catalog until you associate it with the catalog on the Product Association page. Only after you establish the association can you mark the product as *Featured.*

Featured Product Lists

Product ID

Enter a product ID to define that individual product as a featured product. Create a new row for each product that you want to feature.

Product Brand

Enter a brand to create a business rule for featuring products based on that brand. For example, you could select all NIKE, Inc. products as featured products.

Note. Define brands on the Product Brand page.

Product Category

Enter a product category to create a business for featuring products based on that category.

Note. Define product categories on the Product Category page.

Product Group

Enter a product group to create a business rule for featuring products based on that group.

Note. Add products to product groups on the Product Groups page in the Product Definition component.

Attribute Name and **Attribute Value**

Enter an attribute name on which to base the business rule, and enter the attribute value. For example, *Material* is an attribute that you could use to define featured items; you could specify that you want to feature all products in the product group *Shoes* that are made of 100 percent leather (in this case, the attribute value would be *Leather*).

Note. Define attributes using the Attributes component. Only attributes that are associated with products whose group usage type is *Information* are available here.

Note. Associate products with attributes on the Attributes page in the Define Products component.

Attribute Label

Displays the description of the chosen attribute.

Service/Product

Enables you to define a business rule for featuring products based on the definition of products as *Service* or tangible type *Products.*

Note. Define products as service or tangible type products on the Definition page in the Product Definition component.

Searching Catalogs

This section provides an overview of product searches and discusses how to search products.

Understanding Product Searches

You can initiate product searches and access product data from different locations in PeopleSoft CRM:

- Customer registry users can run searches by clicking the Find Product link.
- Employee registry users can launch a catalog search by navigating to Orders and Quotes, Find Products on the main menu.

  Once in a catalog, users can access PeopleSoft Real-Time Advisor.
- Employee or customer users can personalize the PeopleSoft CRM portal content by adding the Catalog Search pagelet to their home page (if the PeopleSoft Portal Pack is installed).
- In PeopleSoft Order Capture, CSRs can access product data and run catalog searches from the Entry form to obtain up-to-date information about products or services before they enter an order or a quote.

  CSRs can copy products from the search results back to PeopleSoft Order Capture and use Real-Time Advisor to retrieve catalog data.
- In PeopleSoft Order Capture Self Service, you can link to product detail pages from order lines and access both catalogs and PeopleSoft Real-Time Advisor.

- From Lead and Opportunity components in PeopleSoft Sales, sales representatives can navigate to the Products section on the Propose page and perform keyword searches in catalogs for products.

  Users can then use the product comparison tool to access product details and copy products from the search results back to PeopleSoft Sales.

Product Search Setup

PeopleSoft CRM uses the Verity search engine to run searches against flat files called *search collections.* These files store data that is derived from the same database cache tables that are loaded when you build and populate the catalog. Before you can search a catalog, you must:

1. Ensure to populate the catalog cache tables after making changes to product catalogs. This is done by clicking the Populate Catalog button on Product Catalog page for any new and updated catalog.

2. Create the search collection.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Setting Up Search Collections."

Search Results

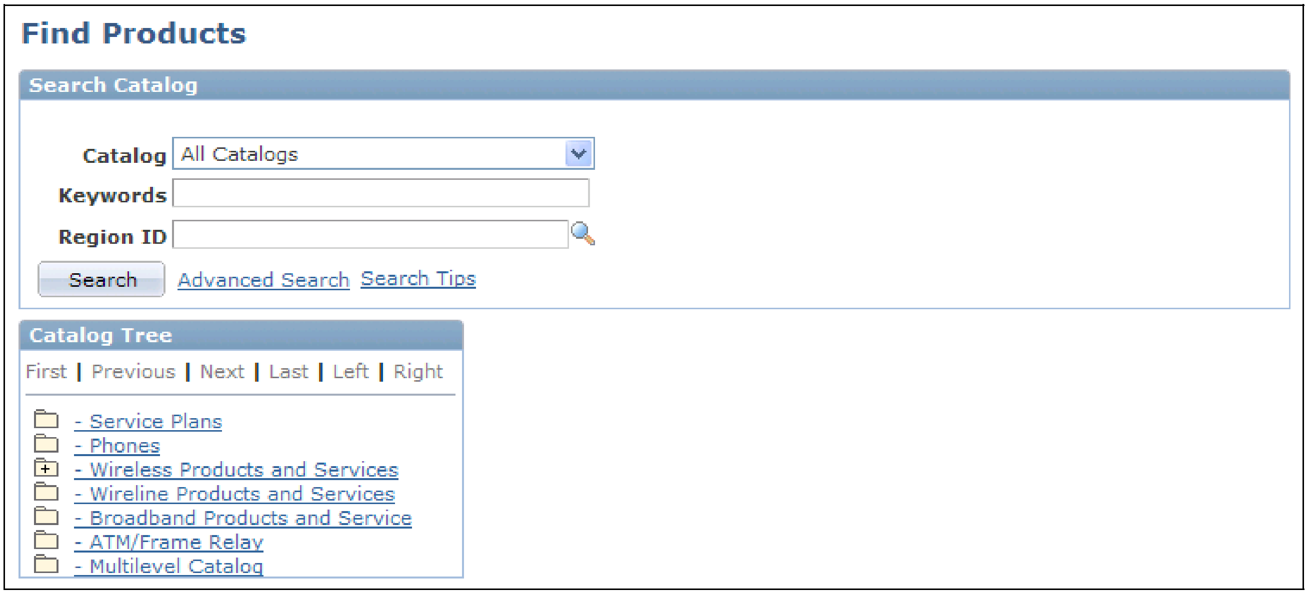
When search results are returned, the user can navigate into product details and compare up to three products. If the product search is performed in the agent-facing Order Capture application, or PeopleSoft Sales, users can select products in the search results and copy them back into the calling component.

Page Used to Search Catalogs

Page Name	***Definition Name***	***Navigation***	***Usage***
Find Products	RX_PROD_SRCH	Orders and Quotes, Find Products, Find Products	Search products in one or more catalogs.

Searching Products

Access the Find Products page (Orders and Quotes, Find Products, Find Products).



Find Products page

Basic Search

A basic search enables you to search catalogs based on selection criteria that you enter in the Catalog, Keywords, and Region ID fields.

Catalog

Select the name of the specific catalog that you want to search, or select *All Catalogs* to run a global search.

Keywords

Enter the keyword or keywords to use in the search. The search looks only in the catalog that you select (or in all catalogs) and looks for keywords across all fields in the search collection.

Note. If you enter multiple keywords, the search treats these as an exact phrase. For example, if you enter *red bike*, the search would not find *blue bike with red trim.*If you want the search to treat multiple keywords independently, you must separate them with a Boolean operator such as *and* or *or*. For example, to find all occurrences of *red* and *bike*, enter *red and bike* in the Keywords field. Conversely, to find all occurrences of *red* or *bike*, enter *red or bike* in the Keywords field.

Region ID

Select a Region ID to narrow the search criteria.

Search

Click the Search button to initiate a search.

Note. Pressing the Enter key after entering a keyword will not initiate the search.

Search Tips

Click to get tips on how to narrow or broaden the searches using the Keywords field or to get tips on advanced searches.

Advanced Search

Advanced searches enable you to enter the same search criteria as in a basic search and more.

Description	Enter a keyword to search only the description field for this value.
Product ID	Enter a complete ID to search only the product ID field for this value.
Brand	Select a brand to search only the product brand field for this value.
Match On	Select the relationship between the elements of the advanced search. Values are: *All Criteria (AND):* Select to relate advanced search criteria to one another using the *and* operator. All of the search criteria that you define (description, product ID, and brand) must be satisfied for the search to return a product. *Any Criterion (OR):* Select to relate advanced search criteria to one another using the *or* operator. Only one of the search criteria that you define (description, product ID, or brand) must be satisfied for the search to return a product. **Note.** Match On options apply only to advanced search criteria. The elements of a basic search (catalog and keyword) are always linked together by an *and* operator. Similarly, the relationship between basic and advanced search elements is always based on the *and* operator.
Search	Click to initiate a search. **Note.** Pressing Enter after entering a keyword does not initiate the search.

Chapter 10

Tracking Installed Products

The chapter provides overviews of installed products, multilevel installed products, installed assets, and hardware asset information mapping and reconciliation and discusses how to:

- Define creation and update rules for installed products.
- Configure installed product display options.
- Set up trees for installed products.
- Copy trees.
- Configure roles.
- Set up product registration.
- Manage installed products.
- View installed product hierarchies.
- Map and reconcile asset information.

Understanding Installed Products

This section discusses:

- How installed products are used.
- How installed products are created and updated.
- System-created service orders for installed products.
- Warranty activation on installed products.
- Hierarchical views of installed products.
- Service activation of pre- and post-paid accounts.
- Use of display templates in the installed product component.

How Installed Products Are Used

Installed products track the products (physical items or services) that are installed at a customer's site or issued to an internal worker. In PeopleSoft Support and PeopleSoft Integrated FieldService, you specify installed products in agreement lines to control the availability of these lines to the specific set of products. Installed products determine whether warranties are involved in the entitlement search when installed products are referenced on cases or service orders. Agents can reference installed products (assets) that are defined in PeopleSoft HelpDesk to determine what equipment is issued to an employee and the location of the equipment.

An agreement can also be an installed product. Agreements define the price of services or support offerings that are covered by the agreement, and the price of the agreement itself. You can define three types of agreements:

- Field service agreements specify what products in which customer sites are entitled to the service that is selected in each agreement line.
- Support agreements reference products on agreement lines.

  Similar to field service agreements, support agreements may define customer sites that are entitled to support offerings. Alternatively, support agreements may contain a list of contacts who are entitled to request the support offerings listed on the agreement lines.
- Help desk agreements represent an agreed upon level of service that an organization provides to its employees.

  Note. Only external or site-based agreements (non-help desk) can be represented by an installed product. Using an installed product to represent an agreement is a special case scenario that allows PeopleSoft Order Capture users to order an agreement in addition to a regular product, since both can be represented as installed products.

How Installed Products Are Created and Updated

You can manually create and maintain installed products for most products that are listed in the system using the Installed Products component. Use the Product Definition - Installed Product page to define rules that govern when installed products are automatically created and updated.

Note. If you are using the Communications solution, installed products cannot be created manually through the Installed Product pages. You must create installed products for communications through other business processes, such as PeopleSoft Order Capture and PeopleSoft Order Management.

You can configure the system to create installed products or update the status of installed products when:

- Orders are placed using PeopleSoft Order Capture or PeopleSoft Order Capture Self Service.
- The CRM system receives automatic shipping notification (ASN) messages from another system, such as PeopleSoft Order Management.
- Material usage and removal transactions are recorded using the Service Order component in PeopleSoft Integrated FieldService.

Note. The system automatically creates installed products with the status of *Installed* for products that are newly registered using the Product Registration component. For registered products that already have installed products, the system does not update the installed product status. Based on how the administrator configures the Product Registration page (for example, what fields are available and whether they are editable), users can update installed products as they complete the registration.

At the installation level, you can define two sets of installed product creation and update rules that the system uses as default values for the Product Definition - Installed Product page: one set for those products that require a service order for installation and another set for those that do not. At the product definition level, however, you can have only one set of rules

When you set up these rules for installed products using the Product Definition component, you can click the Apply Defaults button on the Installed Product page to populate the appropriate default rules. While you can modify the default rules for specific products, you can also update the configurable default values (used across all products) on the Installed Product Defaults page under Set Up CRM, Install, Product Options.

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook,* "Setting Up Customer Self-Service," Setting Up Product Registration.

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook,* "Working with Customer Self-Service Transactions," Registering Products.

See and Chapter 10, "Tracking Installed Products," Defining Creation and Update Rules for Installed Products, page 166.

Rules for Installed Product Status

You can configure the system to set the status of installed products that it creates or updates to one of three values: *Pending,Installed,* or *Shipped.* Typically, implementations suggest these rules, but you can configure them for your own business processes.

For a product that requires a service order for installation:

- When the installed product is created after submitting an order, set the status to *Pending.*

  If a subsequent ASN message is received, update the status to *Shipped.*
- When the installed product is created as a result of the receipt of an ASN message, set the status to *Shipped.*
- When a material usage transaction (recorded on the Order Materials component) results in a creation or update of the installed product, set the status to *Installed.*

For a product that does not require a service order for installation:

- When the installed product is created on order capture, set the status to *Pending.*

  If a subsequent ASN message is received, update the status to *Installed.*
- When the installed product is created as a result of the receipt of an ASN message, set the status to *Installed.*

Note. If a product does not require a service order for installation and a rule has been established for ASN receipt that sets the status to a value other than *Installed,* you must manually set the status of the installed product to *Installed* when appropriate.

You may want to set up rules that require manual intervention for business processes that require an action or response from a customer. For example, suppose that you ship a product that requires some type of installation, such as setting up a personal computer that the customer performs. When the customer completes the installation process, he or she can contact you to update the record.

See Also

Chapter 7, "Setting Up Products," Managing Product Relationships, page 98

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Managing Orders and Quotes"

PeopleSoft Integrated FieldService 9.1 PeopleBook, "Ordering and Receiving Materials"

PeopleSoft Order Management 9.1 PeopleBook

System-Created Service Orders for Installed Products

When defining products using the Product Definition component, you can indicate whether an installed product requires a service order to complete installation. When a user places an order for the installed product in PeopleSoft Order Capture or Order Capture Self Service, component interfaces enable the system to stage a service order for the specified installation service in PeopleSoft Integrated FieldService.

When the status of the installed product or group of records that is associated with the ordered product is updated to *Shipped* (that is, when the ASN shows that the corresponding order line has been completely fulfilled), the system automatically generates a service order using the information that is defined for the specified installation service.

The initial status of the system-created service order is *Open,* with all associated service order activities set to *Open* - *Hold Assignment.*

If you enable automatic technician assignment and the system has successfully assigned a provider group and group member to the service order, the status of service order activities that are assigned with technicians is set to *Open* - *Assigned.*

When an order for multiple installed products that require installation is saved in PeopleSoft Order Capture or Order Capture Self Service, the system creates one service order for each product-site combination on the order.

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Working with Order Capture Business Projects"

PeopleSoft Integrated FieldService 9.1 PeopleBook, "Creating and Managing Service Orders"

Warranty Activation on Installed Products

You can define or update warranties using the Warranties component under Customer Contracts CRM, Agreements. Associate an item with a warranty on the Item Definition page under the Items CRM, Inventory Item Definition.

When a user creates a case or service order for a customer's installed product, the system first checks for entitlements that are associated with a valid warranty on the customer's installed product before searching for entitlements on an agreement.

When you create an installed product using an item that is associated with a warranty, the system activates the associated warranty and calculates the warranty duration using information from both the warranty and installed product.

Note. The system can calculate the warranty duration for an installed product only if the appropriate process updated the base date that is used to calculate the warranty's start date.

For example, suppose that the warranty is defined to start upon shipment but no ASN (shipment) status update rules are defined for the product. In this case, the installed product is created at order time, with an order date but no shipment date. The warranty is associated with the installed product at order time, but no warranty dates are populated.

In this scenario, a user must manually update the installed product's warranty start and end dates for the warranty information to appear in entitlement matches. However, if the product has ASN status update rules defined, the system automatically records the ship date and the warranty start and end dates on the installed product as soon as the ASN is processed for the product.

If necessary, you can manually update the warranty status and coverage period on the installed product using the Installed Products component.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up and Managing Agreements and Warranties"

Hierarchical Views of Installed Products

In PeopleSoft CRM, you can establish parent-child relationships between installed products and display them graphically from several points in the system. This functionality can be implemented to support a wide range of business needs, including the ability to view the associated parent assembly or subcomponents for a given installed product, view the geographic locations of specific network components, or view the components of a customer's service package.

Hierarchical Relationship Creation

You can manually define relationships between installed products using the Installed Products component. For a given installed product, you specify the installed product of the parent product to establish a parent-child relationship. When two installed products reference the same parent record the system creates sibling relationships.

The system automatically defines the relationships for installed products that are created when product packages are ordered in PeopleSoft Order Capture or Order Capture Self Service. The system automatically defines relationships for orders of static kits that originate in PeopleSoft Order Management.

For both package and static kit orders, the system creates installed products for each of the products in the package or static kit that are defined as installed products. If a product in a package or static kit is not defined as an installed product, the installed product hierarchy does not display that product.

For example, suppose that a parent product is defined as an installed product, the child product is not, and the grandchild product is. When the package is ordered, the system creates records for only the parent and grandchild rows and establishes a parent-child relationship between them.

How Hierarchical Relationships Are Viewed

Once you define the appropriate relationships, users can view them graphically in a tree format by accessing the Installed Product Hierarchy page. In PeopleSoft CRM, you can access this page from pages and page toolbars in these components:

- Installed Product
- Service Order
- My Service Order
- Support Case
- HelpDesk Case
- RMA (return material authorization) Form
- Site (under Customers CRM)
- Product Registration Installed Assets
- Search Installed Products and Services
- Search Installed Assets
- Customer 360 Degree View
- Worker 360 Degree View
- Order Capture Entry
- Self-Service Accounts
- Self-Service View Services
- Self-Service Support Case
- Self-Service HelpDesk Case

Note. For cases that you access from the corresponding Case components, the View Hierarchy button (which you click to access the Installed Product Viewable Hierarchy page) is not available if the business units to which they belong are associated with call center configuration templates that are set to hide installed product information.

The system filters the installed products that appear in the viewable hierarchy using the name of the customer or internal worker, site, account, product, and department values that are available on the page from which you accessed the viewable hierarchy.

For example, if you access the viewable hierarchy from a page where customer and site fields have values, the system returns all of the installed products for the specified customer and site. If you access the viewable hierarchy from a page where the customer and product fields have values, the system displays all of the installed products for the specified customer and product.

This table summarizes the installed products that are returned for specific field values:

Field Value on Source Page	***Installed Products Returned***
Site	All installed products for the specified customer or internal worker and site plus any related parent, sibling, or child installed products. **Note.** Not valid for PeopleSoft HelpDesk.
Product	All installed products for the specified customer or internal worker and product ID plus any related parent, sibling, or child installed products.
Department	All installed products that match the specified customer or internal worker and department plus any related parent, sibling, or child installed products.
Account	All installed products that match the specified customer and account plus any related parent, sibling, or child installed products.

On the Installed Product Hierarchy page, the system lists the filter criteria values that are used to select which installed products to display. Initially, the system displays all records for all statuses. By default, the system also displays the immediate family relationships—parent, sibling, or child—for each installed product that is returned. You can modify the initial display to view records that match a specific status. You can also elect to filter the family relationships and view only those records that meet the filter criteria on the source page.

Additional runtime filters, other than Status as mentioned previously, exist. Installed Product ID and Product are always shown, whereas the other filters are configurable using the Tree Set Up component.

These filters include:

- Installed Product ID
- Product
- Site
- Account
- Department
- Status

Note. As delivered, the installed product hierarchy supports the display of multilevel installed products for the communications vertical solution (setID=COM01).

See Also

Chapter 7, "Setting Up Products," Managing Product Relationships, page 98

Service Activation of Pre- and Post-Paid Accounts

PeopleSoft Bill Presentment and Account Management enables users to manage both pre- and post-paid accounts. You can also retrieve current billing and account status information on prepaid accounts from a third-party billing vendor.

Prepaid services are paid for before usage. For example, customers may pay in advance for wireless services that will be consumed later. Post-paid customers pay after the wireless service is consumed. Post-paid customers usually have a monthly billing cycle and require credit verification.

To activate these services, use the Service Management Order component in PeopleSoft Order Capture. The system uses the Activate table (RO_ACTIVATE) to hold activation details associated with an activated Service Management Order. It also uses the Capture component interface to load the Service Management Order with the installed product that is being activated. The system transfers control to the Service Management page and loads the new Service Management Order. You can navigate to the component by selecting the Activate Services link from the 360-Degree View page when the system displays a communications customer.

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management," Managing Services

Use of Display Templates in the Installed Product Component

The Installed Product component (RF_INST_PRODUCT) supports the use of display templates in controlling its appearance and behavior for a variety of business needs. At the setID level, you can specify a display template for each of the installed product types (that is, installed product, installed service, installed agreement, and installed agreement), which is used to control, among other things, the visibility of pages, sections, fields and labels of the component.

See Also

Chapter 10, "Tracking Installed Products," Specifying Display Templates for Installed Product Types, page 174

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

Understanding Multilevel Installed Products

Multilevel installed products track multilevel product bundles that customers purchased and installed. After a customer has placed an order for a multilevel product bundle (for example, a contract that includes mobile phone, broadband internet, and cable TV services) and the order has gone through the fulfillment process successfully, a multilevel installed product is created if the multilevel product bundle is set to track as installed product in its product definition. It can be used to perform service requests for the multilevel product bundle in service management orders.

Important! *Multilevel installed product* is a term that is used throughout this documentation to refer to installed products (in most cases of type *service*) that are created for multilevel product bundle components. The term is used to differentiate installed products for multilevel product bundles from those that are created for non-multilevel products, and it is *not* a new type of installed products that is supported in the CRM system.

As delivered, multilevel product bundles and multilevel installed products are enabled in the ordering and service management processes for the communications industry. This functionality can be extended to other industries and solutions through customizations.

Multilevel installed products are modelled after installed products, and they behave similarly to a large extent. However, they differ in a number ways because each of them ultimately supports different product types (multilevel product bundles versus non-multilevel products), for example:

- Multilevel installed products support the storing of peer-to-peer linkage (known as *installed links*) between installed products as they relate to one another in a product hierarchy. The system displays these installed links that pertain to a multilevel installed product in the Links Summary page.
- Additional page fields appear to show information that pertains to multilevel installed products. Similarly, page fields that are irrelevant to multilevel installed products are hidden.

  More information is available in the Managing Installed Products section.

  See and Chapter 10, "Tracking Installed Products," Managing Installed Products, page 188.
- Both multilevel and non-multilevel installed products for the Communications solution cannot be added to the system manually using the Installed Product component. They are always created by the ordering process and updated through service requests. Installed products can be created manually for setIDs that are not Communications-specific.
- The hierarchy viewer, when displaying the structure of a multilevel installed product, can show the entire description of all components within the bundle, including the installed product ID, the product description, and the component type. The viewer can be scrolled both vertically and horizontally so that users can see a complete picture of the multilevel installed product hierarchy.

- Similar to installed products for non-multilevel products, multilevel installed products can be accessed in the activities tree from the Customer 360-Degree View. From the Installed Product node, you can view customer multilevel installed products by status or look them up using the search page. When multilevel installed products appear on the right-hand side of the page on the dynamic grid, they are represented by their top-level installed services. When you select a top-level installed service, the system populates the grid with the immediate descendents of the selected installed service. The dynamic grid supports the display of the first two levels of multilevel installed product structures.

  You cannot add installed products (multilevel and non-multilevel) manually from the Customer 360-Degree View for the Communications solution.

Installed Links

An installed link is a relationship between two multilevel installed product instances after the completion of the ordering process. It is used to maintain the relationship type and connection information between the installed product pair.

Installed links are directional; within any given installed link type, two relationship types are available to further describe the association based on the perspective from which the linkage is being viewed. Suppose that installed product X (parent) is linked to installed product Y (child) through the *Child Of* installed link type. If this relationship is viewed from the perspective of installed product X (on the Links Summary page of the Installed Product component for X), the system displays *Is Parent Of* as the relationship type between installed products X and Y, clarifying the role each installed product plays in the installed link. Similarly, if this relationship is viewed from the perspective of installed product Y, the relationship type between the two becomes *Is Child Of.*

During the service management process, installed products may demonstrate different behavior based on the type of installed links with which they are associated. For example, if you remove an installed product (source) and it is linked to another installed product (target) through the *Brings and Removes* relationship, the target installed product is removed automatically after the configuration is validated and submitted. Now, if the target installed product is brought by a newly added product in the configuration session as a result of satisfying a brings and removes rule condition, then the target installed product is retained. The *brings and removes* installed link with the removed source installed product is disconnected and a new installed link with the new source product is created after the installation of the new source product.

Like installed products for the Communications solution, installed links are created and managed through the execution of these BPEL business processes:

- Communication New Order Process
- Change Service Process
- Service Management Activate Service Process
- Service Management Disconnect Service Process
- Service Management Suspend Service Process
- Service Management Resume Service Process
- Convergent Order Synchronization Process

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Order Capture Delivered Business Processes and Web Services," Delivered Business Processes.

For some configuration rules, such as the *relies on* rules, the validation logic is based on information stored in installed links.

Installed links are created only for product relationships that have the *Installable* option enabled on the Product Relations Codes page. As delivered, they are:

- Child Of
- Brings and Removes
- Sells
- Relies On

Child Of

A *Child Of* installed link connects two multilevel installed products (both commercial components) that are related in the same multilevel product bundle—one being the parent of the other.

The system uses this installed link to track information about the previous parent of a commercial offer in the case where the commercial offer is reparented as a result of a migration action in a service management order. The parent reference in the installed product record is used to keep information on the current parent of the installed product.

Brings and Removes

A *Brings and Removes* installed link connects two multilevel installed products (both commercial components)—one being added to product configuration due to the selection of the other, and the addition is based on the execution of a *Brings and Removes* rule. In this relationship, the source installed product is the one that was originally selected in the configuration, and the target was selected automatically in the configuration as a result of a *Brings and Removes* rule.

Example of a *Brings and Removes* installed link:

Mobile Service Offer (a commercial component) *Brings and Removes* MMS Service Offer (a commercial component).

If a customer removes the Mobile Service Offer in a service management order, the MMS Service Offer is automatically removed in the configuration because of its *brings and removes* relationship with the Mobile Service Offer.

Relies On

Relies On installed links can be used to represent a number of relationships between installed products. A *Relies On* installed link can connect:

- Two installed products (both functional components or both commercial components)**—**one being the prerequisite of the other. In this relationship, the source installed product depends on the target installed product and cannot exist without it. Installed links can be established between functional installed products that are part of the same or different multilevel installed products.

  Here is an example of this *Relies On* installed link: Broadband Unlimited *Relies On* Broadband Subscription.

  If a customer wants to remove the Broadband Subscription multilevel installed product in a service management order, he or she must also remove the Broadband Unlimited product because its existence depends on the presence of the Broadband Subscription product. Alternatively, the customer must link the Broadband Unlimited product to a different Broadband Subscription product to meet prerequisite requirement, otherwise, the configuration session becomes invalid.

- Two installed products (both functional components or both commercial components)**—**the source is a group offer and the target is a member of the group offer. In this relationship, the target installed product uses the resources of the source installed product with other members.

  Here is an example of this *Relies On* installed link: Mobile Line *Relies On* Shared Phone Directory

  If a customer wants to remove a multilevel installed product that uses a group offer or disconnect this type of *Relies On* installed link, he or she needs to modify the multilevel contract of the group offer, rather than the contract in which the member of the group offer resides. To do so, create a convergent order and select the multilevel contract of the group offer. Remove the Mobile Line installed product or disconnect the installed link. Removing the Mobile Line installed product directly from the configuration in a service management order invalidates the product configuration due to the presence of the *Relies On* installed link.

Sells

A *Sells* installed link connects an installed product of a commercial component to an installed product of a functional component. The commercial installed product must belong to a component type that is marked as *Link to Functional,* which is *atomic offer* as delivered in the system.

Example of a *Sells* installed link:

LiveBox Offer (an atomic offer) *Sells* LiveBox (a functional component)

When a customer has purchased a LiveBox functional product through the LiveBox Offer, these two installed products are related through the *Sells* installed link, creating a commercial-functional pair.

Creation of Installed Links

When installed links are first created (as part of order or service management order fulfillment), they are set in the *Pending-Connection* status along with the creation (or update) of their related installed products in the *installed product creation* phase of a BPEL business process. In the case of convergent orders in which products in one child order relate to products in another child order, installed links for these products are created in the *Pending-Connection* status as soon as the first child order reaches the installed product creation phase. For an installed link to be created in the *Pending-Connection* status, only one of its two installed products needs to be available, as the product ID information that is available in the installed link is sufficient for validating configuration rules for the installed link in configuration sessions. When the second order reaches the installed product creation phase, validation is performed to check if the installed link is already created to avoid duplication.

For convergent orders that have child orders and installed links span across different child orders, a BPEL process is in place to synchronize the fulfillment process of these related child orders, ensuring that each installed link instance of the convergent order has both the source and target installed products IDs before a message is sent to the provisioning system about the installed products and their installed link. The synchronization process holds up the dispatch of the message until all relevant installed link data is collected.

The system changes the installed link status from *Pending-Connection* to *Installed* after receiving a callback message from the provisioning system about the source installed product, regardless of the current status of its target installed product. This message is treated as a confirmation of the fact that the installed link has been fulfilled successfully by the provisioning system.

In the case where an installed link is about to be created for existing installed products as a result of a service management order, the installed product statuses are subject to evaluation to ensure that the installed products are not being cancelled by any concurrent order. If the target installed product is in a status that cannot be associated with another installed product, (for example, *Pending-Disconnection* or *Disconnected*), the service management order fulfillment process, which establishes the installed link, gets an error and cannot be completed. Similarly, in the case where a target installed product is going to be disconnected through a service management order, checks are performed to make sure that no new installed links targeting this installed products are in the process to be created. If any of these links (for example, in *Pending-Connection* or *Activated* status) are found in the system, the service management order fulfillment process results in an error and cannot be completed.

Installed Link Creation - Example

This example highlights the different stages involved in the installed link creation process and presents how installed link status changes as a result of a status update in its related installed product. The example starts with the creation of a convergent order, followed by the generation and fulfillment of its child orders. Installed links are created as part of the fulfillment process.

This table displays the order line summary information and order line relationships of a new convergent order used in this example:

Order Line Number	***Action***	***Contract***	***Product***
1	Add	C1	Prod A
2	Add	C1	Prod B
3	Add	C2	Prod A1
4	Add	C2	Prod B1

Order Line Relationship	***Action***	***Product Link***	***Related Source Order***	***Order Line***	***Related Target Order***	***Related Order Line ID***
1	Add	A—>B	N/A	1	N/A	2
2	Add	A—>B1	N/A	1	N/A	4
3	Add	A1—>B	N/A	3	N/A	2

Order Line Relationship	Action	Product Link	Related Source Order	Order Line	Related Target Order	Related Order Line ID
4	Add	B1—>A1	N/A	4	N/A	3

Upon the submission of the convergent order, the *Submit Convergent Order* business project generates two child orders based on the information provided. Here are the details of the two child orders:

- Order line summary and order line relationships for child order #1:

Order Line Number	Action	Contract	Product	Original Order Line
1	Add	C1	Prod A	1
2	Add	C1	Prod B	2

Order Line Relationship	Action	Product Link	Related Source Order	Order Line	Related Target Order	Related Order Line ID
1	Add	A—>B	N/A	1	N/A	2
2	Add	A—>B1	N/A	1	Parent Order	4
3	Add	A1—>B	Parent Order	3	N/A	2

- Order line summary and order line relationships for child order #2:

Order Line Number	Action	Contract	Product	Original Order Line
1	Add	C2	Prod A1	3
2	Add	C2	Prod B1	4

Order Line Relationship	Action	Product Link	Related Source Order	Order Line	Related Target Order	Related Order Line ID
1	Add	A—>B1	Parent Order	1	N/A	2
2	Add	A1—>B	N/A	1	Parent Order	2
3	Add	B1—>A1	N/A	2	N/A	1

The submission of child orders kicks off the fulfillment process. This table describes the steps in the process where major events in the impacted installed products occur:

Step	Child Order #1	Child Order #2	Description of the Step
1	Installed Products for child order #1 in pending status	-	Child order #1 is the first order that reaches the "Create installed product in pending status" step of the fulfillment process. In this step, installed products for child order #1 are created and they are in pending status. Child order #2 has not yet reached this step.
2	Put on hold at the synchronization step	-	Child order #1 stops processing at the synchronization step awaiting child order #2 to catch up. No message from child order #1 is sent to the provisioning system. Child order #2 has not yet reached the "Create installed product in pending status" step.
3	-	Installed Products for child order #2 in pending status	Child order #2 reaches the "Create installed product in pending status" step of the fulfillment process, and installed products are created for it in pending status. Child order #1 is still at synchronization step waiting for the notification from the synchronization process instance of its parent convergent order.
4	Message sent to provisioning system	Message sent to provisioning system	After installed products are created for both orders, a synchronization message is sent from the synchronization BPEL process to all affected child orders, notifying them that they can now send messages to the provisioning system. After this step, both orders are processed independently.
5	-	Callback message sent from provisioning system	The callback message from the provisioning system for child order #2 is received. Fulfillment of child order #2 can progress towards completion.
6	-	Installed Products for child order #2 in *Installed* status	Installed products of child order #2 are updated to *Installed.*
7	Callback message sent from provisioning system	-	The callback message from the provisioning system for child order #1 is received. Fulfillment of child order #1 can progress towards completion.
8	Installed Products for child order #1 in *Installed* status	-	Installed products of child order #1 are updated to *Installed.*

During the fulfillment process, installed links are created and their statuses updated based on the status change of their associated installed products. Status updates take place in these steps (data fields that are updated within the corresponding step are highlighted in blue):

- Step 1

Installed Products	
Product	Product Status
Product A (child order #1)	Pending
Product B (child order #1)	Pending
Product A1 (child order #2)	N/A
Product B1 (child order #2)	N/A

Installed Links			
Link	Link Status	Source	Target
A->B	Pending	Product A	Product B
A->B1	Pending	Product A	N/A
A1->B	Pending	N/A	Product B
B1->A1	N/A	N/A	N/A

Three out of four installed links are created in pending status as a result of the creation of installed products (pending) for child order #1

- Step 3

Installed Products			
Product		Product Status	
Product A (child order #1)		Pending	
Product B (child order #1)		Pending	
Product A1 (child order #2)		Pending	
Product B1 (child order #2)		Pending	
Installed Links			
Link	Link Status	Source	Target
A->B	Pending	Product A	Product B
A->B1	Pending	Product A	Product B1
A1->B	Pending	Product A1	Product B
B1->A1	Pending	Product B1	Product A1

The remaining installed link is created in pending status as a result of the creation of installed products (pending) for child order #2

- Step 6

Installed Products	
Product	Product Status
Product A (child order #1)	Pending
Product B (child order #1)	Pending
Product A1 (child order #2)	Installed
Product B1 (child order #2)	Installed

Installed Links			
Link	Link Status	Source	Target
A->B	Pending	Product A	Product B
A->B1	Pending	Product A	Product B1
A1->B	Installed	Product A1	Product B
B1->A1	Installed	Product B1	Product A1

Two out of four installed links are updated to Installed status as a result of status change in installed products (Installed) for child order #2

- Step 8

Installed Products	
Product	Product Status
Product A (child order #1)	Installed
Product B (child order #1)	Installed
Product A1 (child order #2)	Installed
Product B1 (child order #2)	Installed

Installed Links			
Link	Link Status	Source	Target
A->B	Installed	Product A	Product B
A->B1	Installed	Product A	Product B1
A1->B	Installed	Product A1	Product B
B1->A1	Installed	Product B1	Product A1

The remaining two installed links are updated to Installed status as a result of status change in installed products (Installed) for child order #1

This table presents some of the status combinations of source and target installed products and how each combination affects its installed link:

Source Installed Product Status	***Target Installed Product Status***	***Installed Link Status***	***Description***
N/A or Pending Installation	N/A or Pending Installation	Pending Connection	In a case where both source and target installed products as well as the installed link are created in the single process, installed link is created in the pending status together with the source or target product, whichever is first created in the pending status.

Source Installed Product Status	***Target Installed Product Status***	***Installed Link Status***	***Description***
Pending	Installed	Pending Connection	Because installed links are fulfilled in the context of their source products, the installed link status is not updated as long as its source installed product remains unchanged, despite that the target installed product status is updated to *Installed*.
Installed	Pending	Installed	Because installed links are fulfilled in the context of their source products, the installed link status is updated to *Installed* after receiving a callback message from the provisioning system.
Installed	Installed	Pending Connection	Installed link can be created between products that are already installed.
Installed	Installed	Installed	Installed link can be created between products that are already installed. The status of the installed link is changed to *Installed* after receiving a callback message from the provisioning system.

Suspension or Resumption of Installed Links

Installed links are automatically suspended or resumed when their associated source installed products are suspended or resumed. The suspension or resumption of installed products and their installed links does not require validations from configuration sessions. For rule validation purposes, suspended or resumed installed products and links are still considered active. For the same reason, in case of a suspension or resumption request in a convergent order that involves an installed link covering two different child orders, the convergent order synchronization process is not required.

Only top-level multilevel installed products can be added to convergent or service management orders for suspension or resumption. While there is no dedicated actions that are displayed in the Line Relationships section for suspending or resuming installed links, these links are automatically suspended or resumed after their source installed products have been suspended or resumed successfully by the corresponding BPEL business processes. These processes update the status of installed links based on the status change of their source installed products, for example, from *Pending-Suspension* to *Suspended* for a suspension request, and from *Pending-Resumption* to *Installed* for a resumption request. Installed link statuses can be viewed on the Links Summary page. The status change in the target installed products in a suspension or resumption service management order does not affect the status of its installed links.

Installed Link Suspension or Resumption - Example

This table displays several scenarios where status change of installed links can occur as a result of service suspension or resumption:

Source Installed Product Status	*Target Installed Product Status*	*Installed Link Status*	*Description*
Installed	Pending-Suspension or Suspended	Installed (no change)	Installed link status is not updated when its target installed product is suspended.
Installed	Pending-Resumption	Installed (no change)	Installed link status is not updated when its target installed product is resumed.
Pending-Suspension or Suspension	Installed	Change to Pending-Suspension or Suspension	Installed link status is changed according to the status change of its source installed product.
Pending-Resumption	Installed	Change to Pending-Resumption	Installed link status is changed according to the status change of its source installed product.

Cancellation of Installed Links

Installed links can be cancelled independently or as a result of a disconnection of their source or target installed products. As installed links are closely tied to their source installed products, their cancellations are requested through the submission of service management orders for their source installed products. The disconnect service business process updates the status of installed links, for example, from *installed* to *Pending-Disconnection* and then *Disconnected*.

In the case of an installed link cancellation request in a convergent order that involves an installed link covering two different child orders, the convergent order synchronization process is not required as all the information needed for the cancellation is available in the installed link record.

Installed Link Cancellation - Example

This table displays several scenarios in which status change of installed links can occur as a result of link cancellation or service disconnection:

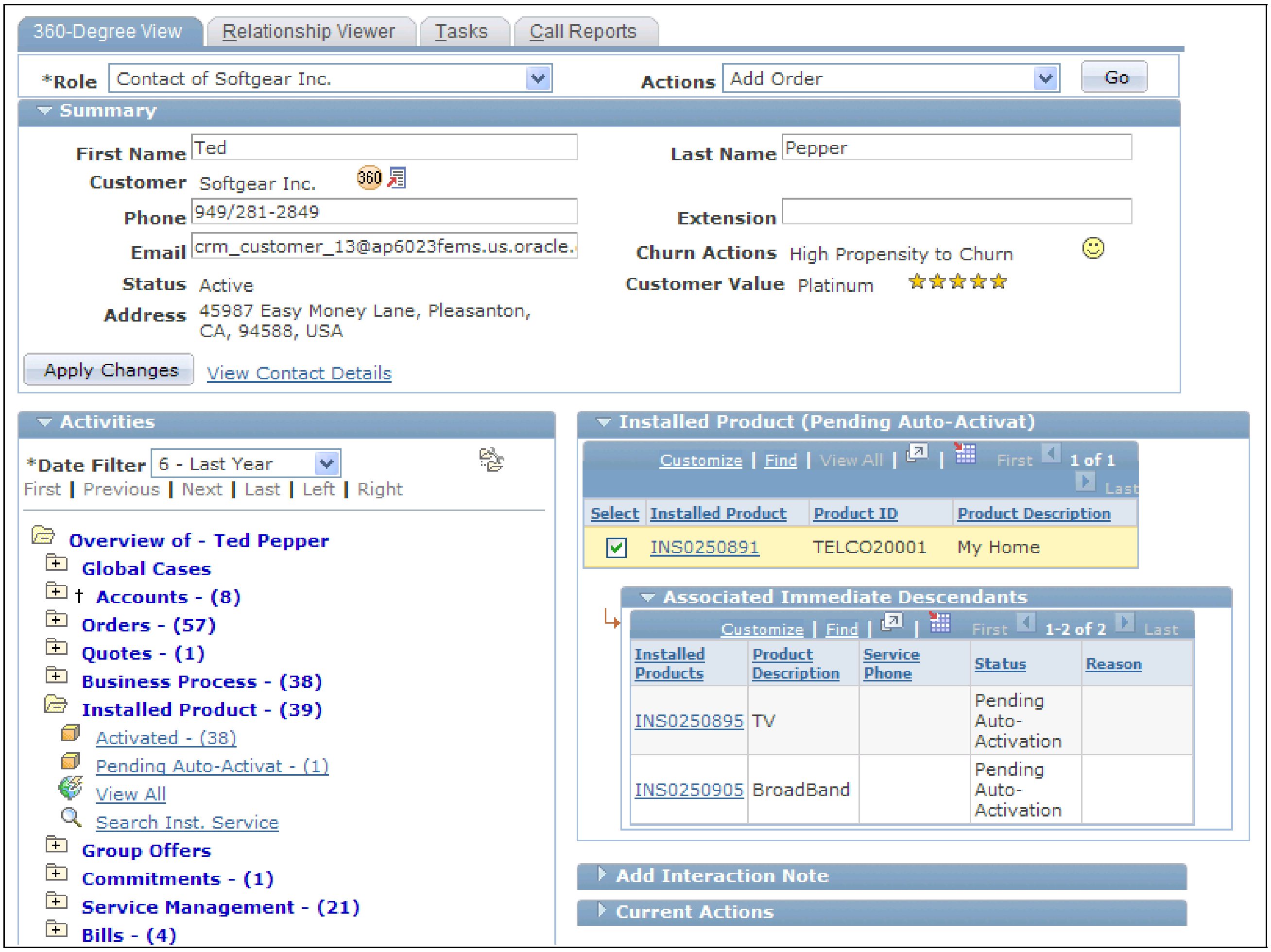
Source Installed Product Status	*Target Installed Product Status*	*Installed Link Status*	*Description*
Installed	Installed	Pending-Disconnection or Disconnected	Installed link can be cancelled irrespective of source or target installed products, provided that all configuration rules are not violated (for example, installed link is being replaced). As installed linked are fulfilled in the context of source installed products, disconnecting installed links requires the submission of service management orders for source installed products.

Source Installed Product Status	***Target Installed Product Status***	***Installed Link Status***	***Description***
Pending-Disconnection or Disconnected	Installed	Pending-Disconnection or Disconnected	Installed link needs to be removed when its source installed product is being removed.
Installed	Pending-Disconnection or Disconnected	Pending-Disconnection or Disconnected	Installed link needs to be removed when its target installed product is being removed. As installed linked are fulfilled in the context of source installed products, disconnecting installed links requires the submission of service management orders for source installed products.

Multilevel Installed Products in 360-Degree View

360-Degree View supports the display of multilevel installed products for customers under the Installed Product node of the Activities section. Within the node, multilevel installed products are represented by the display of their top-level components. Like other components in this section, you can view a list of available multilevel installed products by status and perform standard search. You cannot, however, add new multilevel installed products from the 360-Degree View.

Clicking a status link in the Installed Product node populates the dynamic grid on the right hand side with installed product records of the selected status. When you select an installed product from the dynamic grid, the system displays its immediate child installed products in a sub-grid. This example shows a dynamic grid with a selected installed product and its immediate descendents:



Customer 360-Degree View - Dynamic grid showing a selected installed product and its immediate child installed products

Delivered Nodes

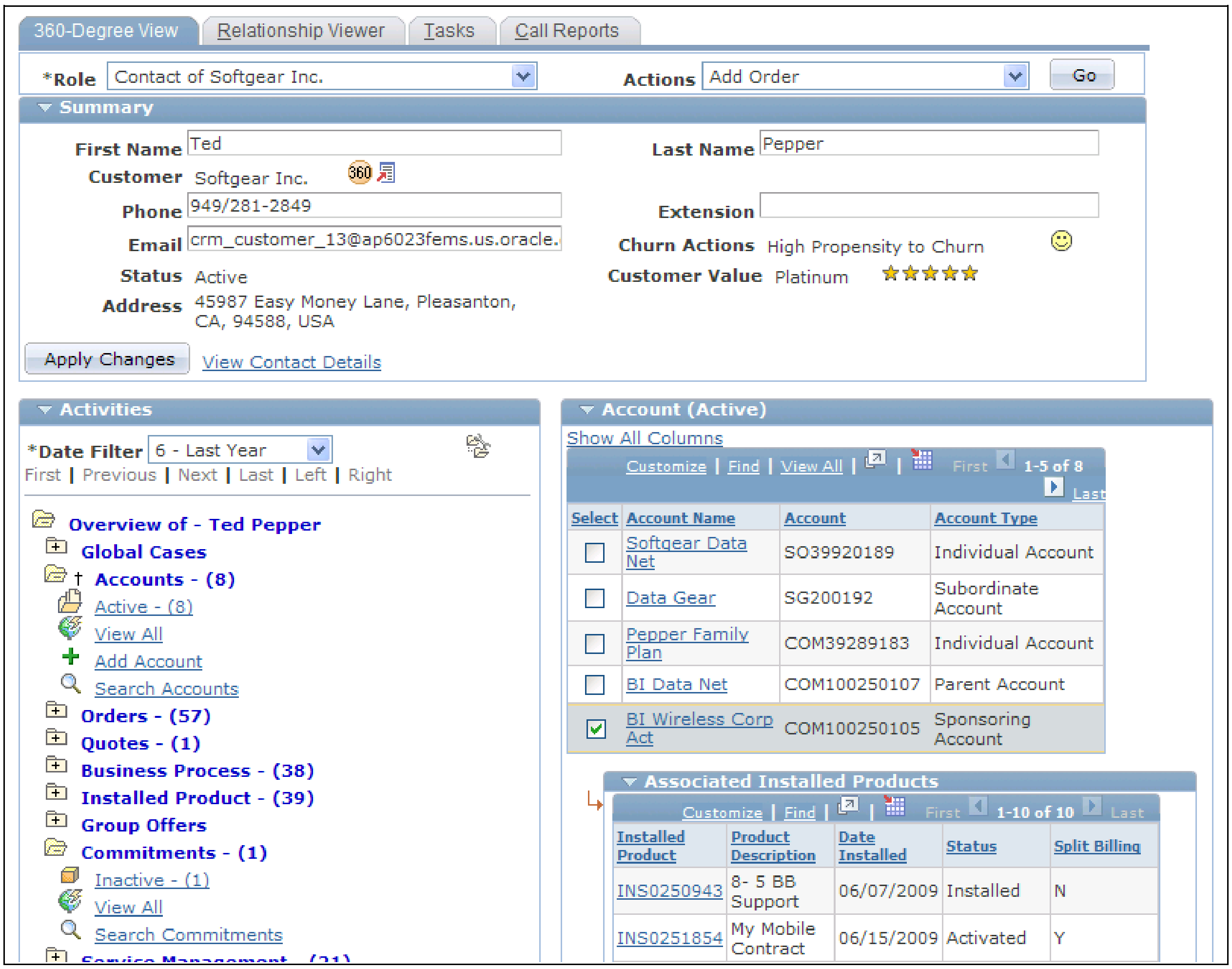
PeopleSoft CRM delivers a number of nodes in the Activities tree hierarchy to display various information that pertains to multilevel installed products. These nodes are:

- Account

360-Degree View supports the display of split billing information for multilevel installed products under the Account node of the Activities section. You can view a list of available billing accounts for the customer by status and perform standard search.

Clicking a status link in the Account node populates the dynamic grid on the right hand side with billing accounts of the selected status and information such as the account name, number and type. When you select an account from the dynamic grid, the system displays installed products that are associated to the account (installed products that the account pays for). The Split Billing option indicates whether any given installed product is paid for by the selected account fully or partially. *Y* means that the account shares the bills of the corresponding installed product with other accounts, and *N* means that the account pays for corresponding installed product entirely.

This screenshot shows a dynamic grid with a list of accounts that are returned after clicking a status link:

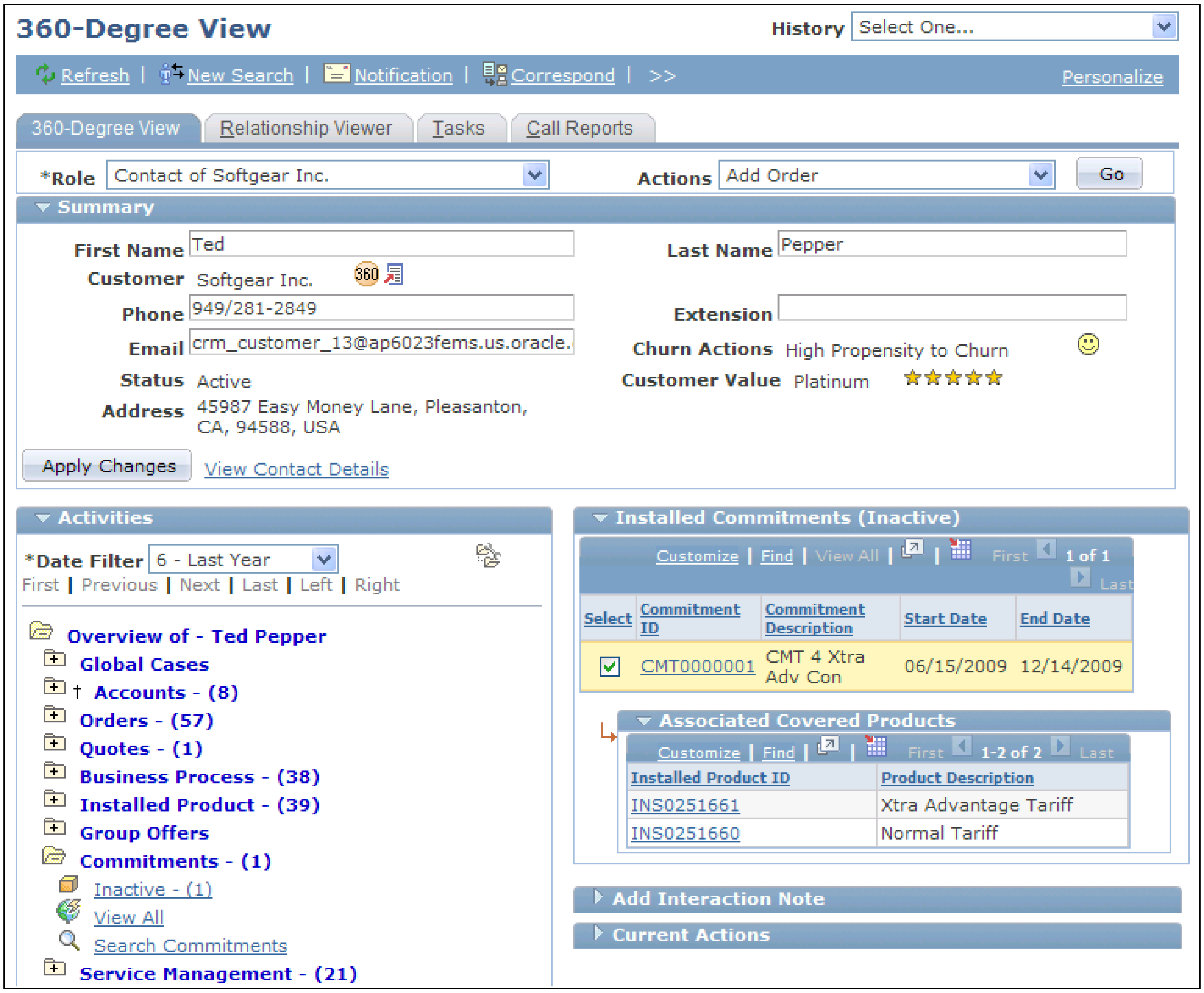


Customer 360-Degree View - Dynamic grid showing a selected account and its associated installed products

- Commitment

Customer 360-Degree View supports the search and viewing (by status) of commitments in the system under the Commitments node of the Activities section.

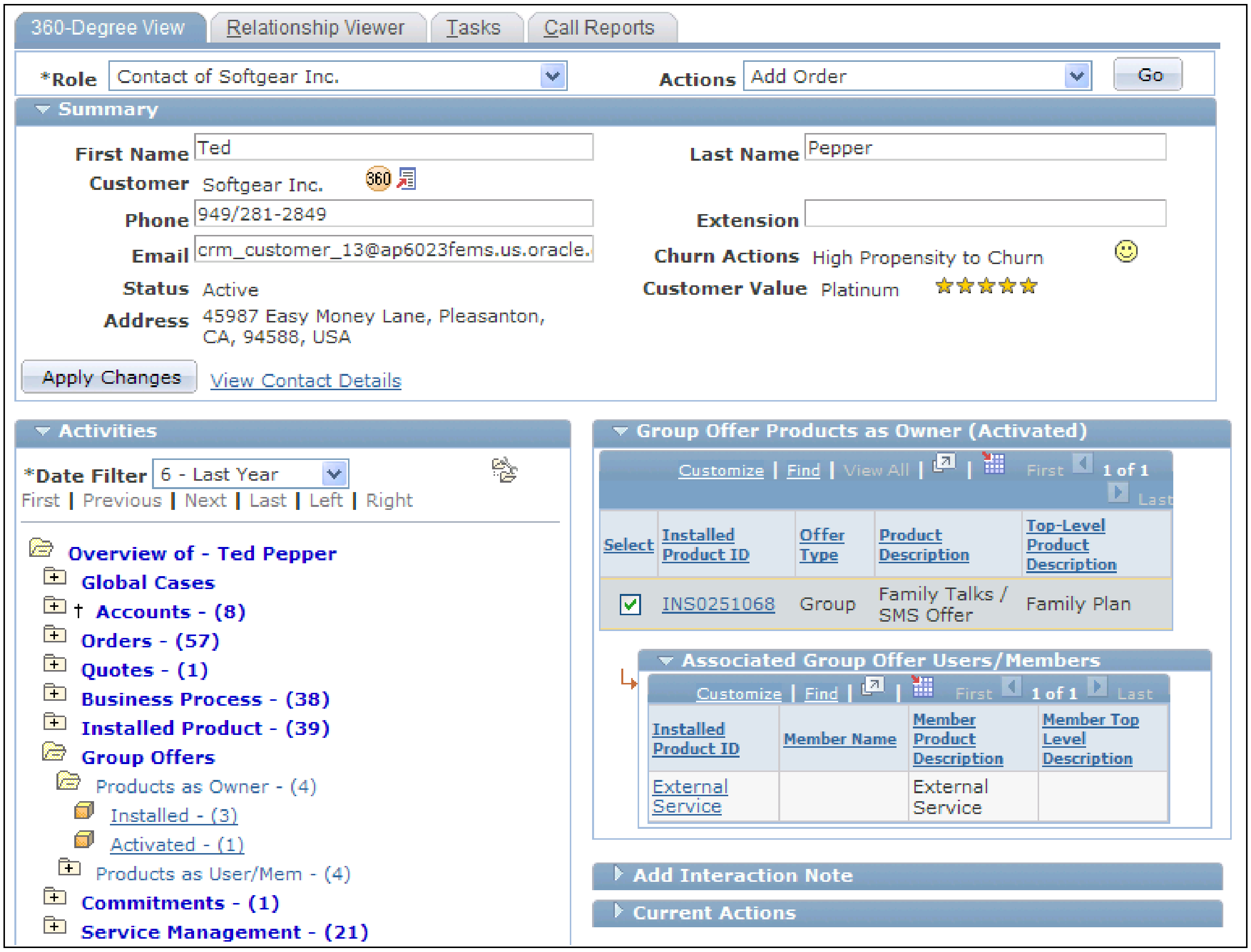
Clicking a status link in the Commitments node populates the dynamic grid on the right hand side with commitments of the selected status and information such as the ID, start and end dates of the installed commitments. When you select an commitment from the dynamic grid, the system displays installed products that the installed commitment covers in a sub-grid. This screenshot shows a dynamic grid with a list of installed commitments that are returned after clicking a status link:



Customer 360 Degree View — Dynamic grid showing a list of installed commitments that are in the selected status

- Group Offers

The Group Offers node displays multilevel installed product information for group offer owners or members, and organizes the information based on the current status (for example, *Active*,*Pending Activation*, or *Pending Disconnection*).



Customer 360 Degree View — Dynamic grid showing a list of group offer products that are in the selected status

The Products as Owner sub-node displays group offer products that the selected customer owns.

The Products as User/Member sub-node displays group offers that the selected customer uses, but is not an owner.

Clicking a status link in the Group Offers node populates the dynamic grid on the right hand side with installed product records for a group offer owner or member.

Understanding Installed Assets

This section discusses:

- How the CRM installed asset table is updated.

- How new assets in PeopleSoft Financials Management System, FMS, are identified in CRM.

How the CRM Installed Asset Table is Updated

Installed assets may be manually entered directly into the system using the Installed Assets page. For customers using PeopleSoft FMS, installed asset entries may be initially created by a full synchronization to the FMS asset repository data. All FMS entries of Asset_Type 010 (IT-Hardware) are added to the data on the CRM-installed asset table. Subsequent additions and updates to the FMS asset repository data for Asset_Type 010 entries are sent to CRM for incremental synchronization.

Before running the full Asset synchronization, you need to run these full synchronizations from FMS to CRM:

- Asset Subtype
- Manufacturer
- Location
- Department
- Employee

Performing these synchronizations ensures that the values used in the asset entries for the tables listed previously will exist in the system. This action helps prevent *Invalid Entry* problems when viewing the installed asset data.

This preparation also ensures that the relevant data referred to on FMS assets (customer, department, manufacturer, and so on) has corresponding entries on the CRM side. Without the corresponding data on the CRM side, the full synchronization may attempt to create a CRM-installed asset for an employee who does not exist in CRM. If you attempt to create an installed asset this way, the system displays an error message.

How New Assets in PeopleSoft Financials are Identified in CRM

When asset data is sent from FMS to CRM, the CRM-installed asset table is updated like this:

Positive Matches

- If a match exists on the business unit and asset ID between the FMS data and the CRM data, the CRM data for that row is updated with all the values from FMS.

  This action may occur when data for an asset has previously been received from FMS by CRM and a change is subsequently saved and published by FMS.

- If a match exists on the installed product ID between the FMS data and the CRM data, the CRM data for that row is updated with all the values from FMS.

  This action may occur when data for an asset was created by CRM and sent to FMS, and a change is subsequently saved and published by FMS. In this case, the corresponding CRM entry would have the same installed product ID (INST_PROD_ID) but would still have no values for the business unit and asset ID.

- If a match exists on the serial ID but not the business unit or asset ID, the CRM data for that row is updated with all the values from FMS.

  This action may occur if data for the same asset has been entered independently in both FMS and CRM.

  Note. If data for the same asset has been entered in FMS and CRM in a previous release, the FMS entry will not initially have the key fields for the corresponding CRM entry, and the CRM entry will not initially have the key fields for the corresponding FMS entry. However, if both entries refer to the same serial ID, it can be assumed that they refer to the same actual asset.

Assumed Positive Matches

- Asset Tag

  If a match exists between FMS and CRM based on identical non-null values for asset tag and product and if a blank value exists for business unit, asset ID, and serial ID on the CRM side, then the CRM data for that row will be updated with all the values from FMS. This action applies in situations where data for the same actual assets already exists in FMS and CRM but the only value on the CRM side is an asset tag rather than a serial ID. In this case, an update from FMS needs to be matched against the corresponding CRM entry.

- Employee and Product

  If a single matching row exists between FMS and CRM based on identical non-null values for employee ID and product ID and if a blank value exists for business unit, asset ID, and serial ID on the CRM side, then the CRM data for that row is updated with all the values from FMS. This action applies in situations where data for the same actual assets already exists in FMS and CRM and the only value on the CRM side is an asset tag rather than a serial ID. In this case an update from FMS needs to be matched against the corresponding CRM entry

  If a single entry in CRM matches the assigned employee and product, the system assumes it refers to the same actual asset and the CRM entry is updated.

- Department and Product

  If a single matching row exists between FMS and CRM based on identical non-null values for department ID and product ID and if a blank value exists for seriaI ID on the CRM side, the CRM data for that row is updated with all the values from FMS. This action applies in situations where data for the same actual assets already exists in FMS and CRM and the only value on the CRM side is an asset tag rather than a serial ID. In this case, an update from FMS needs to be matched to the corresponding CRM entry.

  If a single entry in CRM matches the assigned department and product, the system assumes it refers to the same actual asset and the CRM entry is updated.

Ambiguous Matches

In all other cases for which the system cannot unequivocally determine that the asset is definitely the same or definitely different on both systems, the data for that row is sent to a reconciliation table that a user may access online.

This case should apply in situations for which data for the same actual assets may exist in FMS and CRM, when the only value on the CRM side is an asset tag rather than a serial ID; but for which the lack of matching unique identifiers or the presence of multiple potential matches prevents a positive match.

In this case, the user needs to determine if an update or an add is required on the CRM side to reconcile the data from FMS.

The online page lists all the rows of data that require reconciliation with CRM entries. You can open each entry to see the possible matches with existing CRM installed assets based on the matches on the product ID and one or more of these fields: Employee ID, Department ID, and Location. Drilling in on the first entry on the screen presents the user with all possible matches.

This detail page shows all possible matching CRM entries and provide an action button to process any of these rows. The Merge Selected Installed Asset link allows you to:

- Confirm that the row for that CRM entry refers to the same actual asset as the data from FMS.
- Update the CRM data with all the values from the FMS system.

After identifying the desired row and clicking the Merge Selected Installed Asset link, the data from the FMS asset is used to update the selected CRM asset. The system then returns to the first screen, which shows all unreconciled FMS asset records.

The Create New Installed Asset button allows the user to specify that the FMS data does not refer to any asset on the CRM side. It also creates a new CRM installed asset row based on the values from the FMS row.

Understanding Hardware Asset Information Mapping and Reconciliation

This section discusses:

- Product mapping for hardware assets.
- Reconciling asset information and defaults.

Product Mapping for Hardware Assets

The CRM Installed Product table requires a product ID for every installed asset. This enables users to see the kind of asset that is being referred to in the system. Since neither the product ID nor inventory item ID are required for entries in the FMS asset table, it is important that the CRM-installed product table entries are assigned a product ID based on the following options:

- If the FMS asset table entry has an entry for the product ID, the system uses it to check the corresponding inventory item ID.

  If more than one inventory item ID is found, the system uses the first inventory item ID when creating the CRM installed product entry.

- If the FMS asset table entry has no entry for the inventory item ID, the product ID is assigned to the CRM installed product entry based on a mapping table that is defined at setup (installation) by the user to map certain fields from the FMS system to the equivalent product ID's that you set up on the CRM system.

  To go to this page, click Set Up CRM Common Objects, Integration Rules, Integration Defaults, Asset Product Mapping. The search page enables the user to open the page for the desired setID value of the Product table to which the user is mapping entries.

This system was designed to create a distinct product that will be mapped to each combination of asset subtype, manufacturer, and model that is expected to be present in the list of assets that is returned from FMS, including the discovery process that is run on FMS. The system allows a product to be associated with each type of asset. When receiving information about a new asset from FMS, CRM checks the mapping table to see if a match exists on non-null values for the asset subtype, manufacturer, and model fields.

If a match exists, the system uses the corresponding product from the mapping table to create the new installed asset in CRM. If no match is found on the three fields, a match is attempted on the asset subtype and manufacturer. If a match is found, the corresponding product ID is used. If no match is found on these two fields, a match is attempted only on asset subtype. If no match is found on this field, a match is attempted just on blank values for asset subtype, manufacturer, and model. This type of row corresponds to a default product ID.

Note. A SaveEdit error on the mapping page requires a value for manufacturer if a value for model is present on that row. In addition, this SaveEdit error requires that the user enter a single default value specifying a product that should be used when no other match applies. This entry ensures that we can always map a product to any entry that comes from FMS.

As mentioned previously, you could set up your system so that the assets sent from FMS (asset type of IT-Hardware) have values for asset subtype, manufacturer, and model, and ensure that each of these combinations is mapped to a distinct product on the mapping page. This setup would involve setting up the appropriate asset subtypes and profiles on the FMS side and the appropriate products and product mapping setup page on the CRM side. Providing a default product ID as described previously ensures that a product ID can always be found for use in the CRM installed product table. This default is required since the CRM installed product table requires a product ID value for each of its entries.

Note. Before adding data to the Product Mapping page, you must run the Manufacturer_Fullsync and Copy_AM_Subtype full synchronizations.

Reconciling Asset Information and Defaults

If the system cannot determine if the asset is the same on both the CRM and FMS databases, use the Asset Reconciliation page to reconcile or add asset information.

The system checks the mapping table first to determine the product ID since a default product ID should always exist for use in the mapping table even when no matches occur on the asset subtype, manufacturer, and model data. If no mapping table entry is found, the system derives the product ID from the item ID, which means that the item ID would be used only in cases when no mapping table exists for the setID. Not having a mapping table for the setID, however, would constitute an erroneous data setup.

Defining Creation and Update Rules for Installed Products

This section discusses how to:

- Set up default installed product rules.
- Define installed product rules for a product.

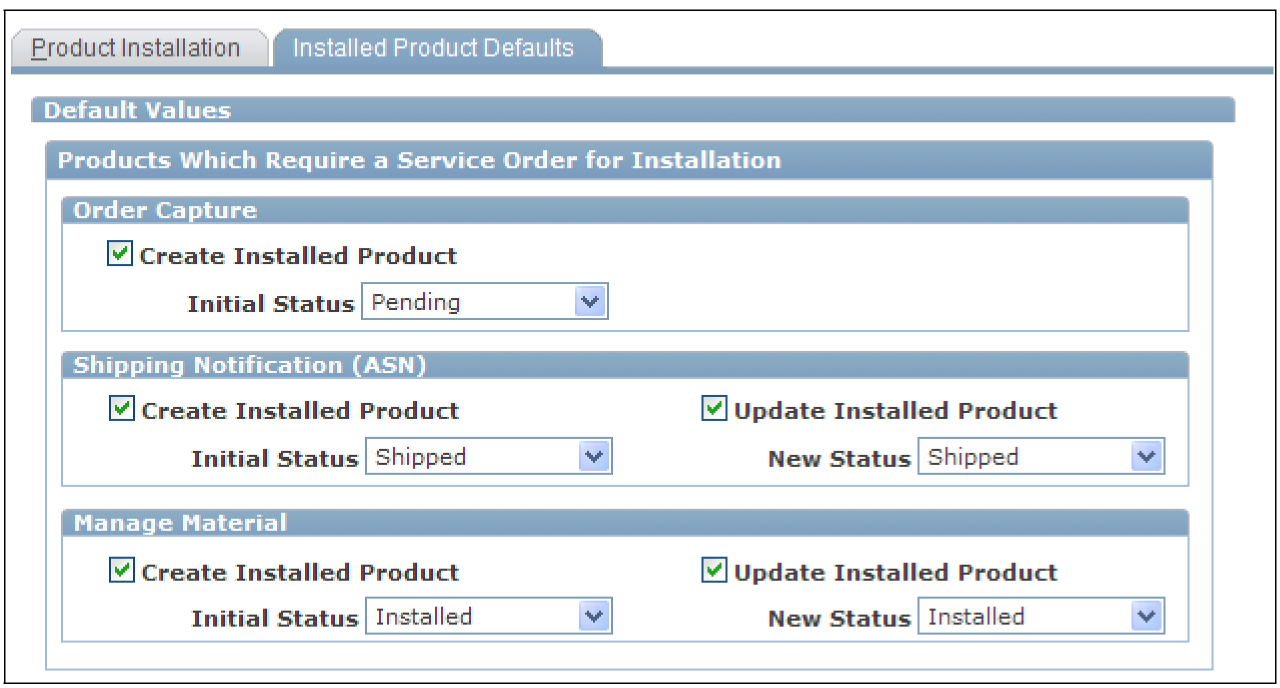
Note. To define creation and updates rules for installed products, use the Product Installation (PROD_INSTALLATION) component.

Pages Used to Define Creation and Update Rules for Installed Products

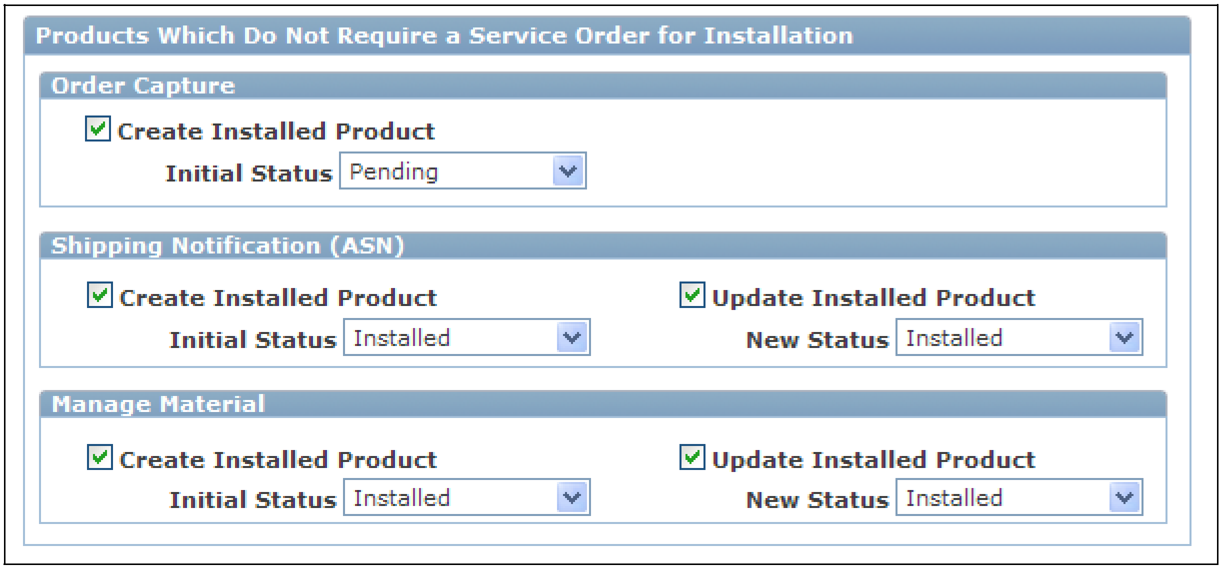
Page Name	*Definition Name*	*Navigation*	*Usage*
Installed Product Defaults	RF_INSTPRD_DFLT	Set Up CRM, Install, Product Options, Installed Product Defaults	Specify default rule sets that determine how system transactions create and update installed products. On the Product Definition - Installed Product page, you can click a button to populate the appropriate default rule set and modify the rules for specific products, as necessary.
Product Definition - Installed Product	PROD_INSTALL	Products CRM, Product Definition, Installed Product	Specify rule sets that determine how system transactions create and update installed products for specified products.

Setting Up Default Installed Product Rules

Access the Installed Product Defaults page (Set Up CRM, Install, Product Options, Installed Product Defaults).



Installed Product Defaults page (1 of 2)



Installed Product Defaults page (2 of 2)

Products Which Require a Service Order for Installation

Order Capture

If you want the system to create installed products when an order for the product is saved in PeopleSoft Order Capture or Order Capture Self Service, select the Create Installed Product check box and then select an initial status of *Pending*,*Installed*, or *Shipped* for the installed product.

Shipping Notification (ASN)

If you want the system to create installed products when an ASN message for the order is received, select the Create Installed Product check box and then select the initial status of the installed product.

If the system should update existing installed products when an ASN message for the order is received, select the Update Installed Product check box and select the new status of the installed product.

You can select both check boxes with appropriate statuses to enable the rule sets for creating and updating installed products.

Note. For products that require a service order for installation, you cannot define rules that enable the installed product status to be set to *Installed* when an order is captured or an ASN is received.

Manage Material

If you want the system to create installed products when material usage and removal is recorded using the Order Materials component in PeopleSoft Integrated FieldService, select the Create Installed Product check box and then select the initial status of the installed product.

If the system should update existing installed products when material usage and removal is recorded using the Order Materials component, select the Update Installed Product check box and then select the new status of the installed product.

You can select both check boxes with appropriate statuses to enable the rule sets for creating and updating installed products.

Products Which Do Not Require a Service Order for Installation

Order Capture

If the product does not require a service order for installation, and the installed product is created when an order for the product is saved in PeopleSoft Order Capture or Order Capture Self Service, select the Create Installed Product check box and then select an initial status. PeopleSoft suggests that you set the initial status to *Pending.*

Shipping Notification (ASN)

If the system receives a subsequent ASN message for a product does not require a service order for installation, select the Create Installed Product check box and then select the initial status of *Installed.*

If the system should update existing installed products when an ASN message for the order is received for a product that does not require a service order for installation, select the Update Installed Product check box and then select a new status. PeopleSoft suggests that you set the new status to *Installed.*

You can select both check boxes with appropriate statuses to enable the rule sets for creating and updating installed products.

Note. If a product does not require a service order for installation and a rule has been established for ASN receipt that sets the status to a value other than *Installed*, you must manually set the status of the installed product to *Installed* when appropriate.

You may want to set up rules that require manual intervention for business processes that require an action or response from a customer.

For example, suppose that you ship a product that requires some type of installation, such as setting up a personal computer, that the customer performs. When the customer completes the installation process, he or she can contact you to update the record.

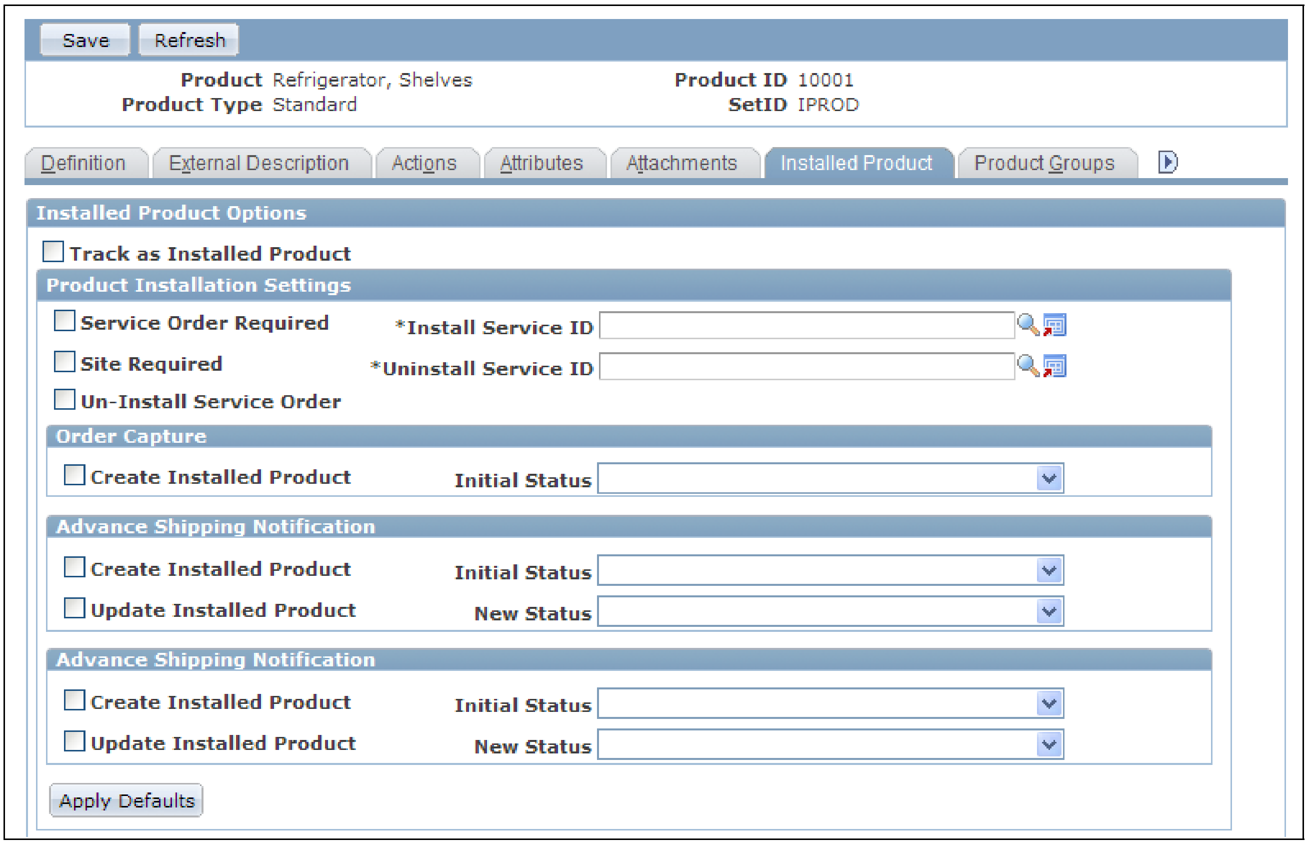
Manage Material

If the product does not require a service order when material usage and removal is recorded using the Order Materials component in PeopleSoft Integrated FieldService, select the Create Installed Product check box and then select the initial status of *Installed.*

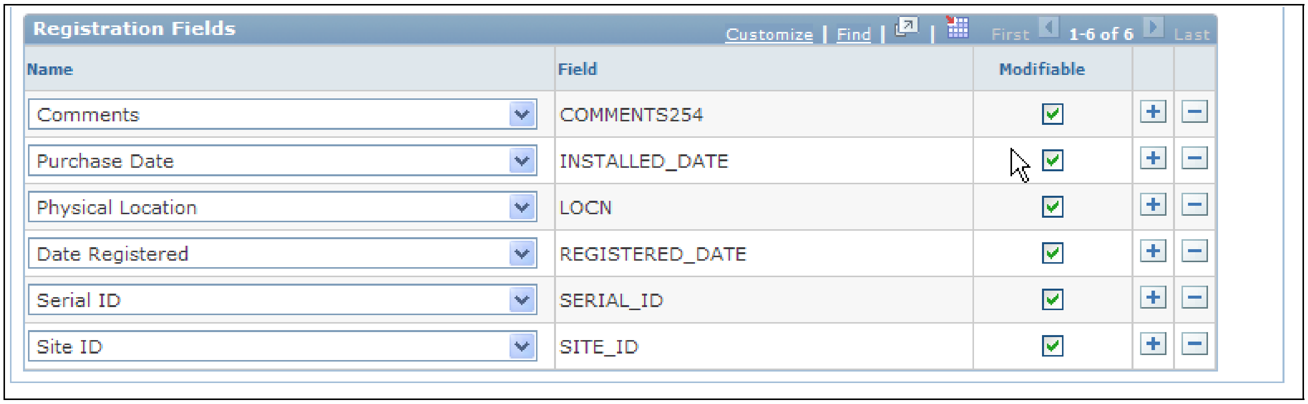
If the system should update existing installed products when material usage and removal is recorded using the Order Materials component in PeopleSoft Integrated FieldService for a product that does not require a service order for installation, select the Update Installed Product check box and then select a new status. You should set the new status to *Installed.*

Defining Installed Product Rules for a Product

Access the Product Definition - Installed Product page (Products CRM, Product Definition, Installed Product).



Product Definition - Installed Product page (1 of 2)



Name	Field	Modifiable
Comments	COMMENTS254	☑
Purchase Date	INSTALLED_DATE	☑
Physical Location	LOCN	☑
Date Registered	REGISTERED_DATE	☑
Serial ID	SERIAL_ID	☑
Site ID	SITE_ID	☑

Product Definition - Installed Product page (2 of 2)

Track as Installed Product Select to enable installed products to be created automatically for the product.

Product Installation Settings

Service Order Required Select if a service order must be created for product installation.

Install Service ID Select the ID of the service that would be used to install the product. Define services using the Services component under Set Up CRM, Product Related, FieldService.

Note. If a site is required for the service you selected, the system automatically selects the Site Required check box. Also, if the same service is used to remove the product, the system automatically fills in the Uninstall Service ID field with the name of the service.

Site Required Select to require a customer site on orders that are created for the product in PeopleSoft Order Capture or Order Capture Self Service. If selected, users must select a site address for the install address on the Entry Form - Shipping page before they can save the order.

Uninstall Service ID Select the ID of the service that would be used to remove the product. Define services using the Services component under Set Up CRM, Product Related, FieldService.

Un-Install Service Order Select if a service order is required to remove the product.

Apply Defaults

Click to populate the appropriate default rules that determine how system transactions create and update installed products. The system returns one of two default rule sets depending on whether the Service Order Required check box is selected. You can modify these rules as necessary for the specific product.

Default creation and update rules for installed products are defined on the Installed Product Defaults page under Set Up CRM, Install, Product Options.

Note. The fields in the Order Capture, Shipping Notification (ASN), and Manage Material group boxes are the same as those on the Installed Product Defaults page.

See and Chapter 10, "Tracking Installed Products," Defining Creation and Update Rules for Installed Products, page 166. and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working with Future Dated Orders and Temporary Services," Enabling Use of Temporary Services at Product Level.

Registration Fields

Use the Registration Fields group box to define which of the installed product fields appear for users on the Product Registration - Product Registration Details page, where they register products.

The system populates this area with the default values that you define on the Product Registration Setup page. You can modify this registration field list as needed. The selection that you make on the Product Definition - Installed Product page is specific to the associated product only.

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook,* "Setting Up Customer Self-Service," Configuring Installed Product Registration.

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Managing Orders and Quotes," Entering Shipping, Payment, and Billing Information

Configuring Installed Product Display Options

To configure installed products, use the Installed Product Configuration (RF_IPRD_CONFIG) and Installed Product Statuses (RF_IPRD_CFG_STAT) components.

This section discusses how to:

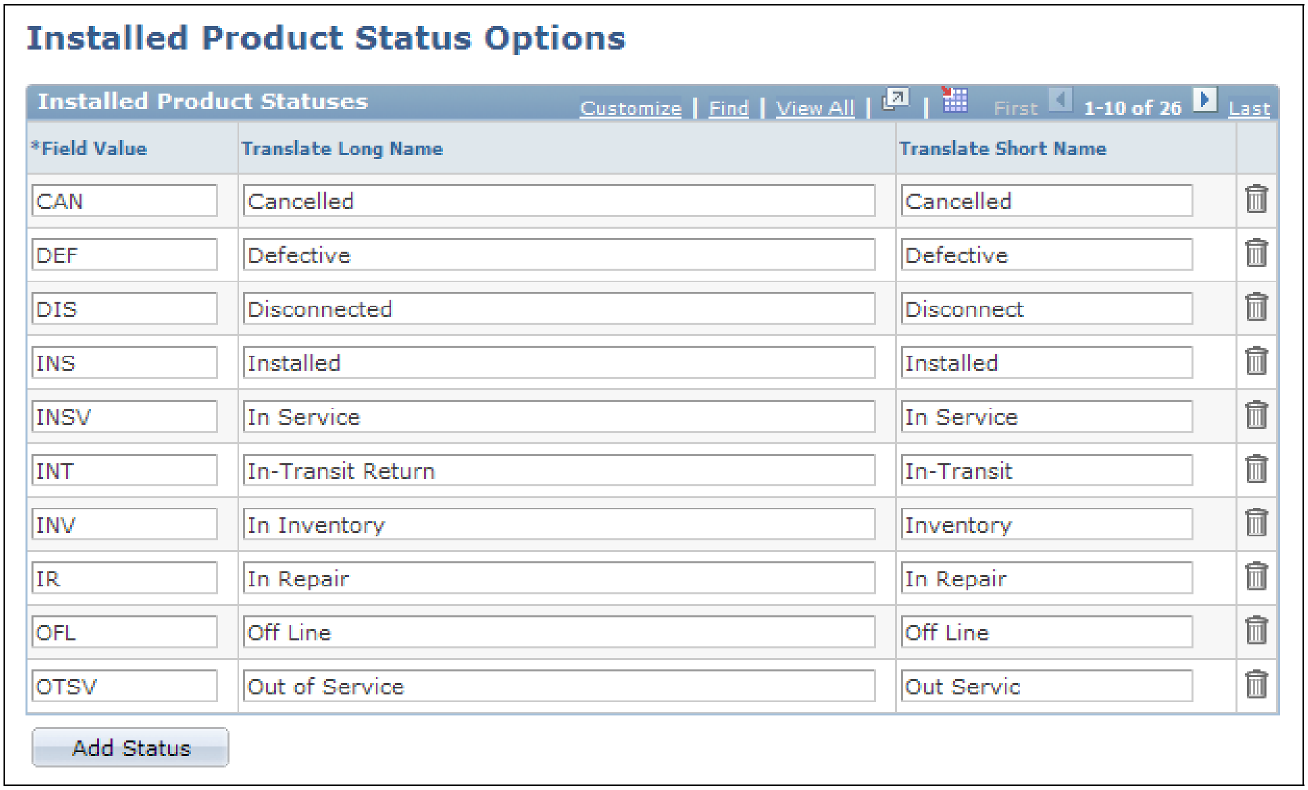
- Define installed product status options.
- Specify display templates for installed product types.
- Define status translate values for installed products.

Pages Used to Configure Installed Product Display Options

Page Name	***Definition Name***	***Navigation***	***Usage***
Installed Product Status Options	RF_IPRD_CFG_STAT	Set Up CRM, Common Definitions, Installed Product, Installed Product Statuses, Installed Product Status Options	Enter installed product status options.
Configuration Options	RF_IPRD_CONFIG	Set Up CRM, Common Definitions, Installed Product, Configuration Options, Configuration Options	Specify, by setID, display templates to be used for installed product types.
Define Status Translates	RF_IPRD_CONFIG_ST	Set Up CRM, Common Definitions, Installed Product, Configuration Options, Define Status Translates	Define status translate values for installed products.

Defining Installed Product Status Options

Access the Installed Product Status Options page (Set Up CRM, Common Definitions, Installed Product, Installed Product Statuses, Installed Product Status Options).



Installed Product Status Options

Installed Product Statuses Customize | Find | View All | First 1-10 of 26 Last

*Field Value	Translate Long Name	Translate Short Name
CAN	Cancelled	Cancelled
DEF	Defective	Defective
DIS	Disconnected	Disconnect
INS	Installed	Installed
INSV	In Service	In Service
INT	In-Transit Return	In-Transit
INV	In Inventory	Inventory
IR	In Repair	In Repair
OFL	Off Line	Off Line
OTSV	Out of Service	Out Servic

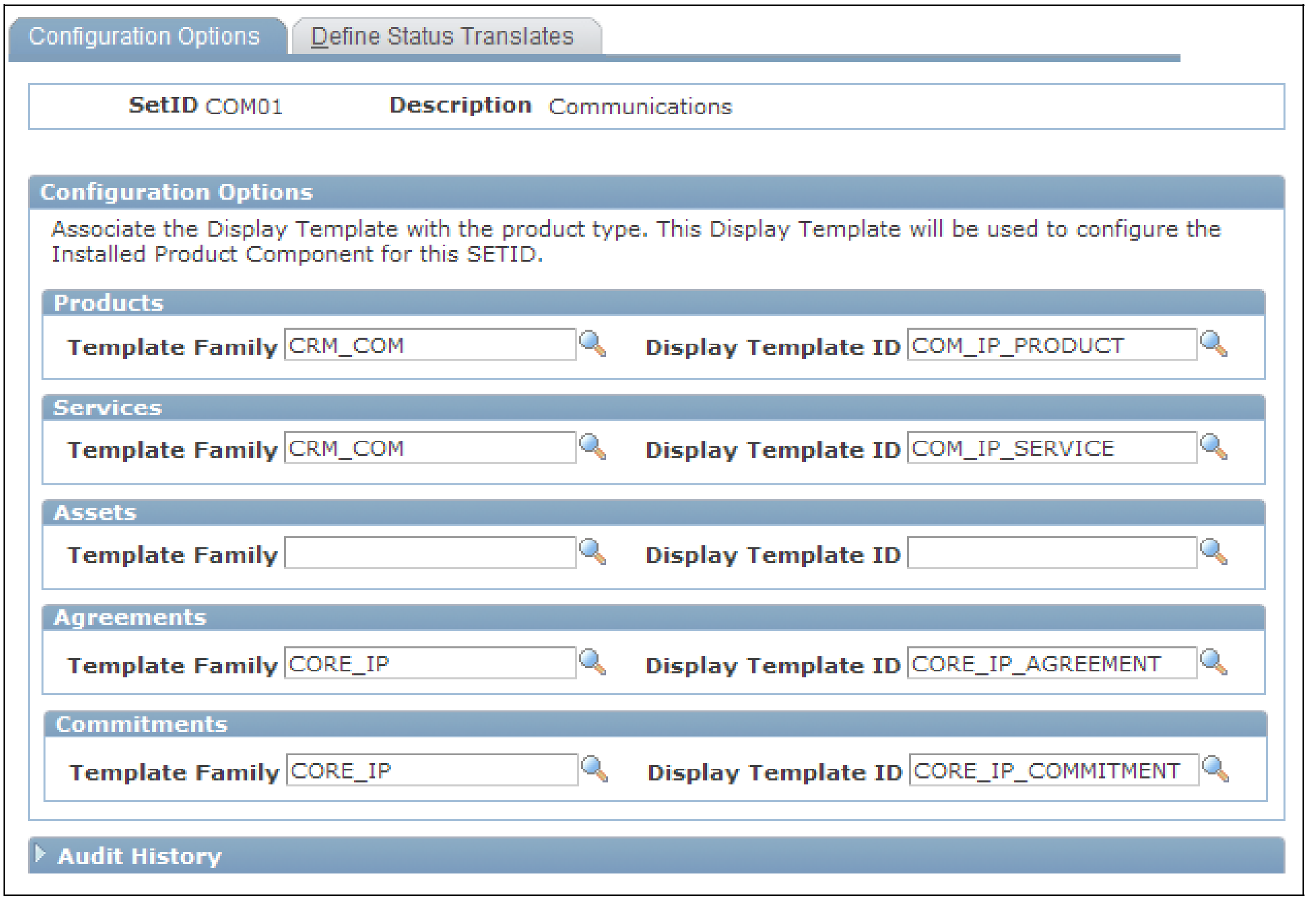
Add Status

Installed Product Status Options page

Enter the code, long description, and short description for the statuses that you want to use for the installed products that you use in your business environment. Users and implementers can select these values from many pages within CRM, including the Define Status Translates page that is documented in this section.

Specifying Display Templates for Installed Product Types

Access the Configuration Options page (Set Up CRM, Common Definitions, Installed Product, Configuration Options, Configuration Options).



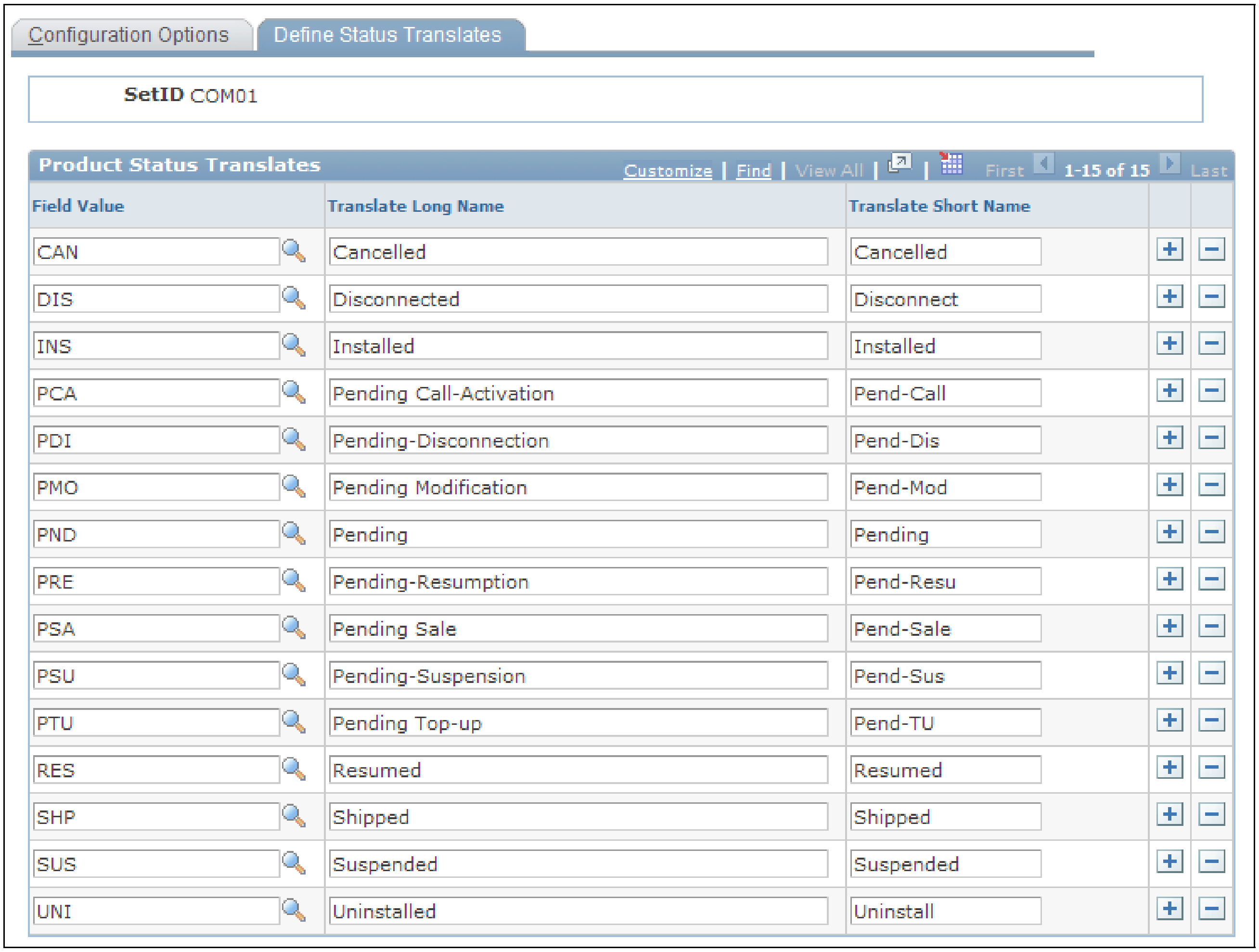
Configuration Options page

For each setID that uses installed products, you must associate each of the installed product types being used with a display template to determine how their records should be presented. A system message appears if an installed product record is opened but then its type is not associated with a display template.

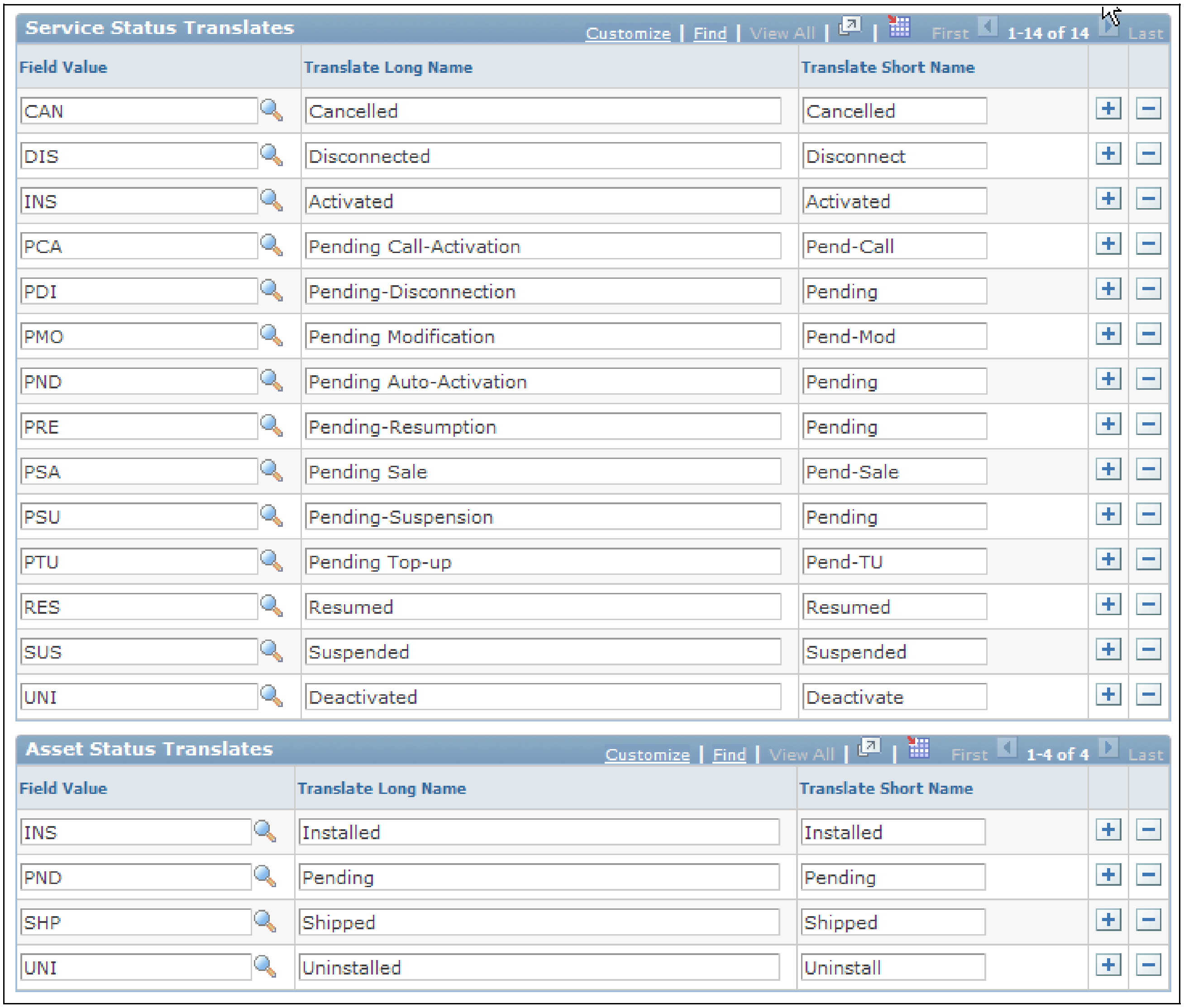
Specify a display template family before selecting a display template for each installed product type.

Defining Status Translate Values for Installed Products

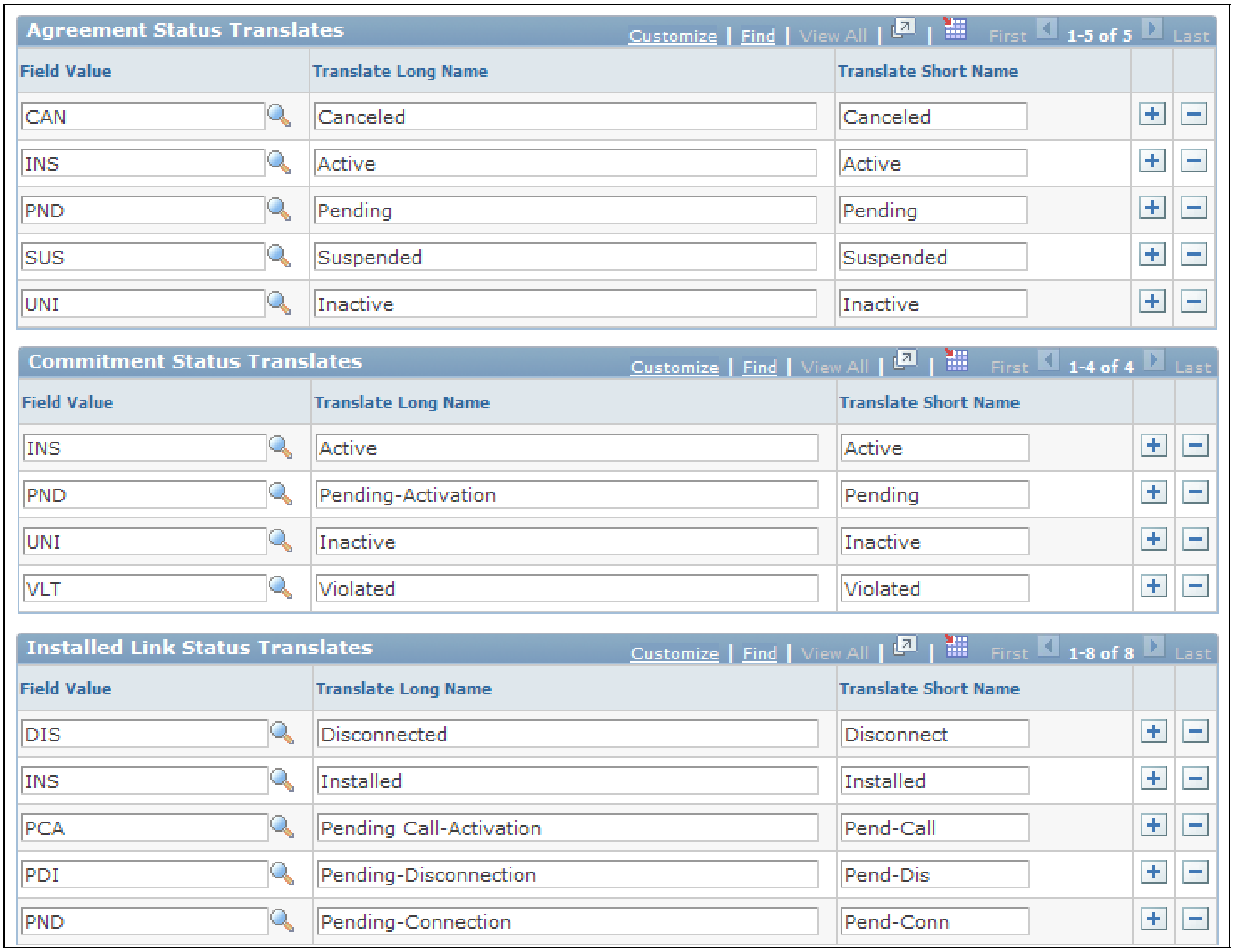
Access the Define Status Translates page (Set Up CRM, Common Definitions, Installed Product, Configuration Options, Define Status Translates).



Define Status Translates page (1 of 3)



Define Status Translates page (2 of 3)



Define Status Translates page (3 of 3)

Note. Status code values are defined on the Installed Product Status Options page, under Set Up CRM, Common Definitions, Installed Product, Installed Product Statuses, Installed Product Status Options.

Use this page to define translate values for installed products, installed services, installed assets, installed agreements, installed commitments and installed links. Enter the field value for each type of product that you are using and then enter a long and short translate name.

Based upon the type of product you are installing, the system displays the values that you enter in the Translate Long Name field in the drop-down list box for the Status field on the Installed Product page.

Note that an installed link is not a type of installed product, rather, it is used to relate two instances of installed products in a multilevel installed product hierarchy, which is supported in the communications vertical solution. The system delivers translate values for these installed link statuses for the *COM01* setID: *Disconnected*,*Installed*,*Pending Call-Activation*,*Pending-Disconnection*,*Pending-Connection*,*Pending-Resumption*, *Pending-Suspension* and *Suspended.* Do not modify predefined installed link statuses as the controller application of Advanced Configurator only works with delivered setup data. Customization is required to support modified or new installed link statuses.

Note. If you do not have PeopleSoft HelpDesk installed, the system does not display the Asset Status Translates group box.

Warning! If you are defining a new set of status translates, the following values should always be used in addition to any optional statuses that you want to add: *INS* (Installed/Activated), *UNI* (Uninstalled/Deactivated), *SHP* (Shipped), and *PND* (Pending). These statuses are hard-coded throughout the system for certain scenarios.

Setting Up Trees for Installed Products

To set up trees for installed products, use the Installed Product Tree Setup (RF_IPRD_TREE_DEFN) component.

This section discusses how to:

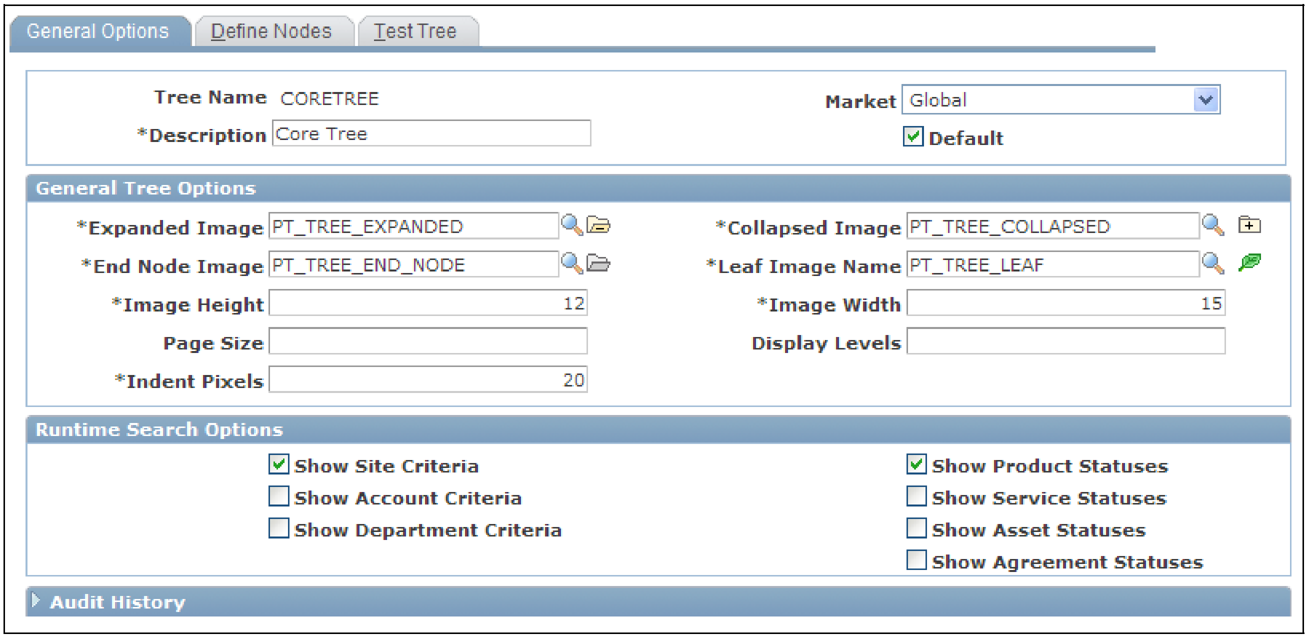
- Set up trees for installed products.
- Set up nodes for installed products.
- Test trees for installed products.

Pages Used to Set Up Trees for Installed Products

Page Name	*Definition Name*	*Navigation*	*Usage*
General Options	RF_IPRD_TREE_DEFN	Set Up CRM, Common Definitions, Installed Product, Set Up Tree, General Options	Define the tree configuration (images to display in the tree, image size, page size, and date filter).
Define Nodes	RF_IPRD_TREE_NODE	Set Up CRM, Common Definitions, Installed Product, Set Up Tree, Define Nodes	Define the parent and child relationship of the tree nodes.
Test Tree	RF_IPRD_TREE_TEST	Set Up CRM, Common Definitions, Installed Product, Set Up Tree, Test Tree	Test the 360-Degree View tree to ensure that you configured it correctly.

Setting Up Trees for Installed Products

Access the General Options page (Set Up CRM, Common Definitions, Installed Product, Set Up Tree, General Options).



General Options page

Tree Name

Displays the name for the tree for the installed product that you entered on the Add page.

Description

Enter a description of the tree you are adding.

Market

Select the market that will use the tree.

Default

Select to set this tree as the default tree that appears for this market on the Installed Product Hierarchy page if multiple trees exist.

General Tree Options

Use the fields in this group box to configure how the tree will look on the Installed Product Hierarchy page.

Expanded Image, Collapsed Image, End Node Image, and **Leaf Image Name**

Enter the images that you want the system to display on the tree. A representation of the image appears to the right of the field. The defaults are:

- Expanded Image:*PT_TREE_EXPANDED*
- Collapsed Image:*PT_TREE_COLLAPSED*
- End Node Image:*PT_TREE_END_NODE*
- Leaf Image Name:*PT_TREE_LEAF*

Image Height and **Image Width**

Enter the size of the image that you want to appear on the tree. The default size is 12 by 15.

Page Size	Enter the page size for the tree. This is the size of the HTML area where the tree is displayed on the Installed Product Hierarchy page. To show the entire tree, enter zero (0).
Display Levels	Enter the maximum number of levels to display on the tree at any given time. To show all levels, enter zero (0).
Indent Pixels	Enter the number of pixels to indent each node. The recommended value is 20.

Runtime Search Options

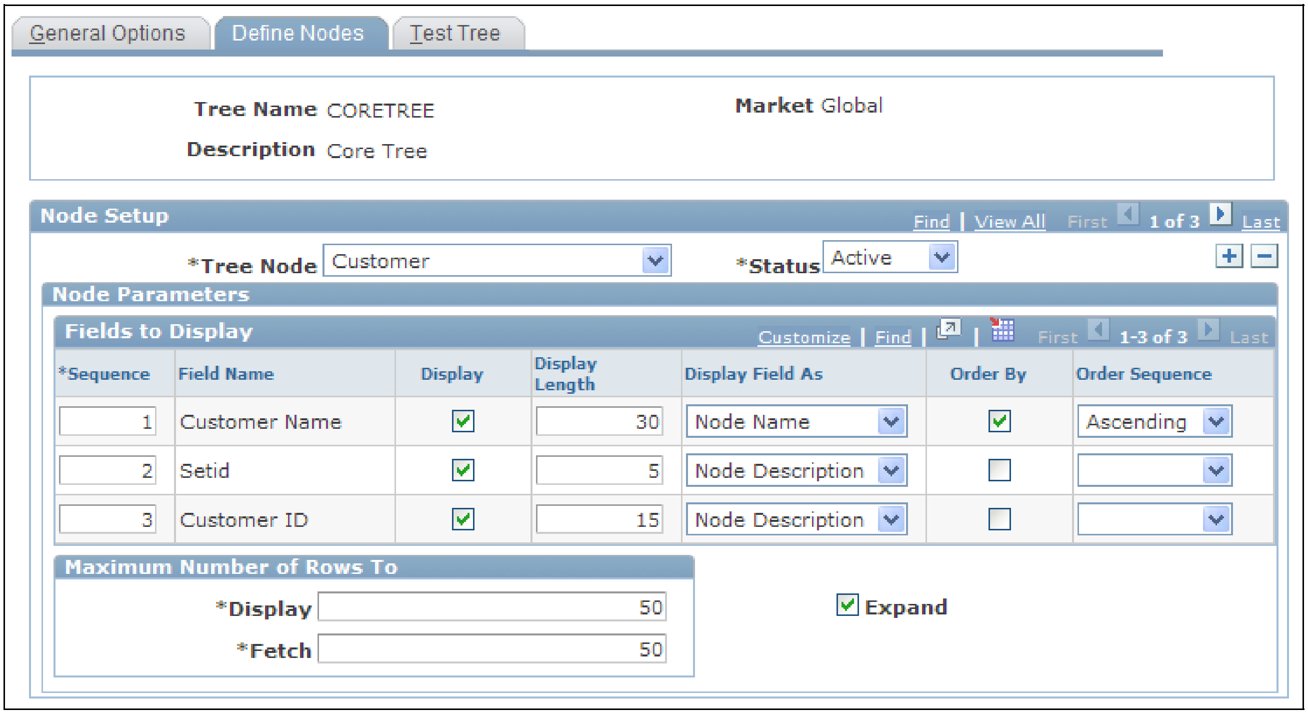
When a user accesses the Installed Product Hierarchy page, the system displays the Product Name and Installed Product ID fields. To add additional search options to the page, select one or more of the check boxes that appear in this group box.

If you do not select any of the status check boxes, then the system hides the All and Single Status options and status drop-down list boxes. If you select one or more status check boxes, the system combines the statuses when it prompts the user for a value.

Note. The system does not display the Show Department Criteria and Show Asset Statuses check boxes unless you have PeopleSoft HelpDesk installed.

Setting Up Nodes for Installed Products

Access the Define Nodes page (Set Up CRM, Common Definitions, Installed Product, Set Up Tree, Define Nodes).



Define Nodes page

This page enables you to establish nodes for customer, site, account, contact, department, employee, and installed product and children.

Node Setup

Tree Node

Select the type of node that you want to add to the tree. The system displays a list of fields associated with the node type in the Node Parameters - Fields to Display group box.

- *Account:* The system displays the Account ID (default) and Account Name fields.
- *Customer:* The system displays the Customer Name (default), Customer ID, and SetID fields.
- *Department:* The system displays the Description (default), Department ID, and SetID fields.
- *Employee:* The system displays the Employee Name (default) and Employee ID fields.
- *Site:* The system displays the Site Name (default), Site ID, and Address fields.
- *Installed Product and Children:* The system displays the Installed Product ID (default), Product Description (default), Status,Serial ID, and Asset Tag fields. This node is a required node. When adding a new tree definition, the system automatically adds this node.

  Note. If a single installed product has multiple statuses, then the system displays *Multiple* on the tree.

Note. If PeopleSoft HelpDesk is not installed, then the system does not display the *Department* and *Employee* nodes in the Tree Node drop-down list. Also, if you establish nodes for *Customer, Site*, or *Account,* then the system does not permit you to establish nodes for either the *Department* or *Employee* nodes and vice versa.

Status

Select the tree node status; either *Active* or *Inactive.* For the node to appear on the tree, the status must be *Active.*

Node Parameters - Fields to Display

Use the fields in this group box to indicate how you want the fields to display for the node you selected.

Sequence

Enter a number to indicate the order in which you want the fields to appear on the tree.

Display

Select this check box for all the fields that you want the system to display for the node.

Display Length

The system displays the number of characters that it can display for the field. The system can connect in a series one or more fields on any of the Display Field As options. Each option, however, has a maximum concatenated display length. For *Node Name,* the maximum is 30 characters. For *Node Description,* the maximum is 40 characters. For *Mouseover Text,* the maximum is 100 characters.

Display Field As

Select an option to indicate how you want the system to display the field name. You can choose either *Node Name, Node Description*, or *Mouseover Text.* If you select *Mouseover Text,* the system displays the name of the field when a user moves their mouse over the node image whether it is a collapsed, expanded, or leaf image.

Note. Nodes always display text as < Node Name> **–** <Node Description>. Thus, all Node Name fields should be sequenced before entering node descriptions. The system forces you to enter it in this sequence if you make a mistake.

Order By and **Order Sequence**

Select this check box if you want the system to order the nodes in the tree in either ascending or descending order. If you select the Order By check box for a field, then you must select either *Ascending* or *Descending* from the Order Sequence drop-down list box. The sequence number determines the order in which the system orders the fields if you select the Order By check box for multiple fields.

Maximum Number of Rows To

Display and **Fetch**

Enter the maximum number of rows to display under the expanded node in the Installed Product Hierarchy. Then enter the maximum number of rows to fetch, or retrieve, from the database when the user clicks View All on the tree node.

Note. If you leave this field blank, the system retrieves 1000 rows. For the Installed Product and Children node, this value applies to the number of installed product records matching the search criteria, not the total installed product records in the entire family.

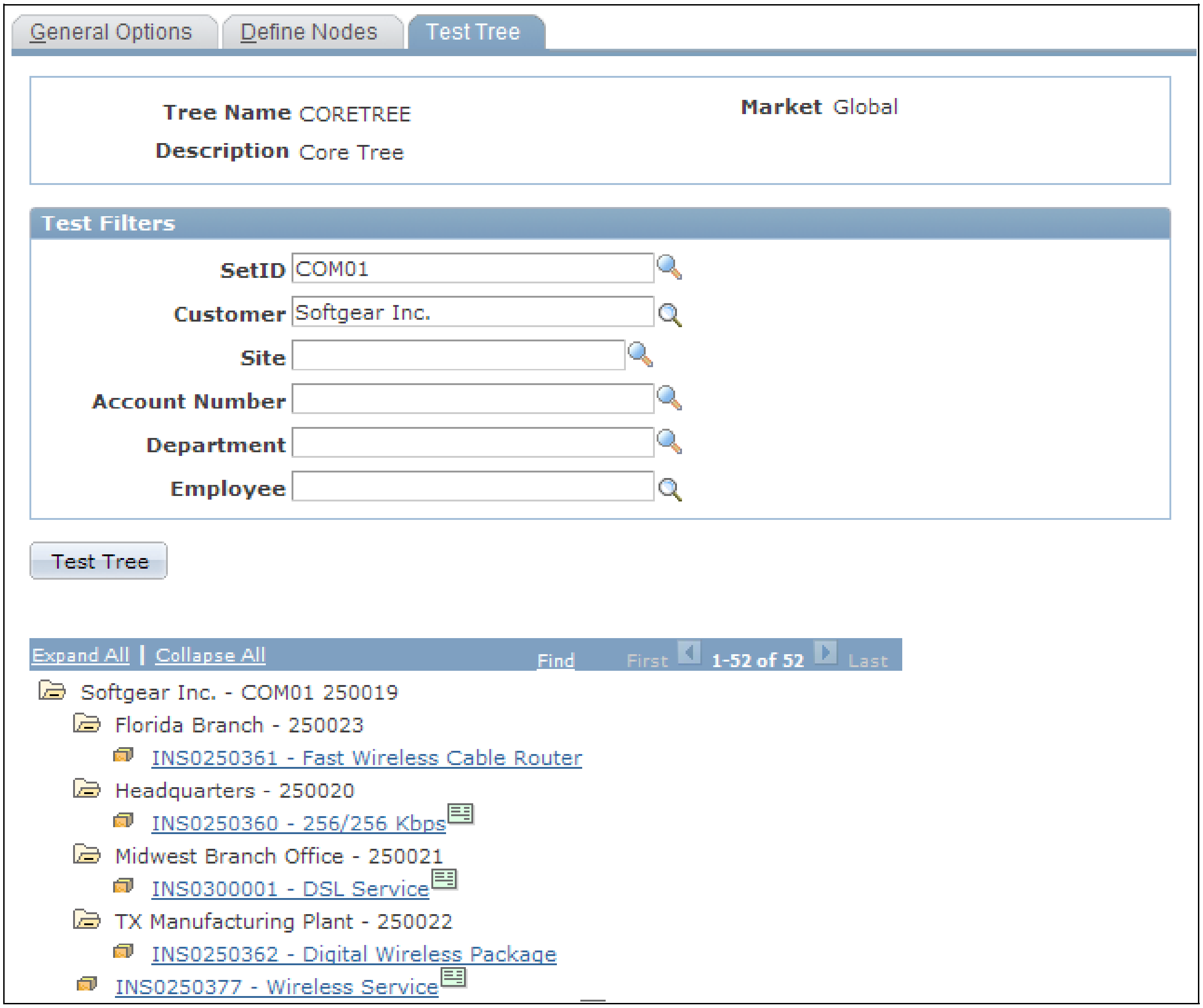
Expand

Select this check box if you want the system to automatically expand the node when a user accesses the tree. For all nodes other than the Installed Product and Children node, the system loads all parents and children despite the setting of this flag.

The system either collapses or expands each node as necessary based on the setting of this flag before display. For the Installed product and child nodes, however, the system loads the children upon demand if you do not select this check box for the node.

Testing Trees for Installed Products

Access the Test Tree page (Set Up CRM, Common Definitions, Installed Product, Set Up Tree, Test Tree).



Test Tree page

1. Enter data into at least two of the fields in the Test Filters group box (at a minimum, one field must be SetID).

2. Click the Test Tree button.

The system verifies the tree configuration and displays that particular tree based on the criteria you entered. This is how the tree will appear on the Installed Product Hierarchy page.

Copying Trees

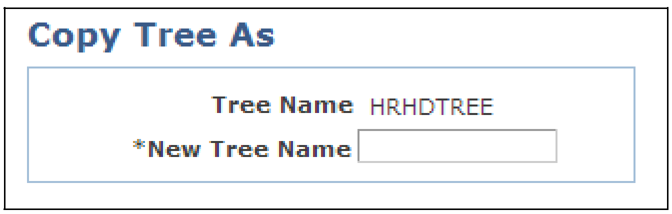
This section discusses how to copy a tree.

Page Used to Copy a Tree

Page Name	*Definition Name*	*Navigation*	*Usage*
Copy Tree As	RF_IPRD_TREE_COPY	Set Up CRM, Common Definitions, Installed Product, Copy Tree, Copy Tree As	Copy an existing installed product tree setup to a new one.

Copying a Tree

Access the Copy Tree As page (Set Up CRM, Common Definitions, Installed Product, Copy Tree, Copy Tree As).



Copy Tree As page

To copy an existing tree, select a tree from the Copy Tree search page and then enter the name of the new tree in the New Tree Name field. Click Save.

Note. If the *Copy From* tree was the default tree for the market, then the system will not select the default flag for the new tree.

Configuring Roles

To configure roles for installed products, use the Installed Product Tree Roles (RF_IPRD_TREE_ROLE) component.

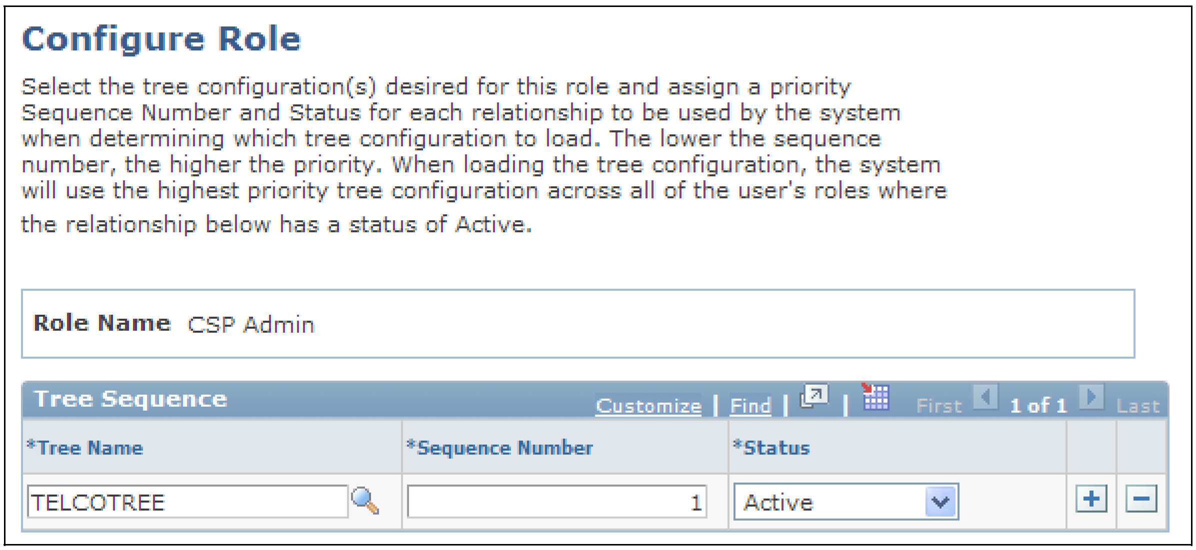
This section discusses how to configure roles for installed products.

Page Used to Configure Roles

Page Name	*Definition Name*	*Navigation*	*Usage*
Configure Role	RF_IPRD_TREE_ROLE	Set Up CRM, Common Definitions, Installed Product, Configure Roles, Configure Role	Assign and prioritize installed product tree setups to a role.

Configuring Roles for Installed Products

Access the Configure Role page (Set Up CRM, Common Definitions, Installed Product, Configure Roles, Configure Role).



Configure Role page

Use this page to associate a given role with a tree configuration. The system uses this information to determine which tree configuration to display when a user accesses the Installed Product Hierarchy page.

Enter a sequence number for the tree so the system knows what tree to display when the user has multiple roles. You can also use the Status field to activate and inactivate trees as needed.

These are the steps that the system follows when selecting a tree configuration to load:

1. Select the tree associated with the user's role as specified on the Configure Roles page.

   If the user has multiple roles defined, the system selects the tree having the lowest sequence number across all user roles that is also active. If multiple roles have the same sequence number, or if none are found, the system skips ahead to Step 2.

2. Select the tree associated with the user's market that has the default flag selected.

   If market is not assigned to the user's preferences or if no default tree is associated with the user's market, the system skips ahead to Step 3.

3. Select the tree associated with the global market that has the default flag selected.

   If none exists, the system skips ahead to Step 4.

4. If no default tree exists for the global market, then the system creates a skeleton tree consisting of only the installed product and children nodes.

Setting Up Product Registration

Use the Product Registration page to specify the statuses for installed products and services by setID. You can also use this page to define the installed product fields that appear on the Product Registration Details page and to indicate which fields are modifiable or read-only.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Customer Self-Service," Setting Up Product Registration

Managing Installed Products

To manage installed products, use the Installed Product (RF_INST_PRODUCT) and Order Capture (RO_CAPTURE) components.

This section discusses how to:

- Enter installed product information.
- View preventive maintenance details.
- Enter attributes.
- View installed product history logs.
- View related orders.
- View multilevel installed product relationships.
- View external service details.

Note. In this section, the discussion of the Installed Product component is based on how it appears through system-delivered display templates. The visibility of sections and fields may differ if a modified or different display template is used.

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Working with Future Dated Orders and Temporary Services"

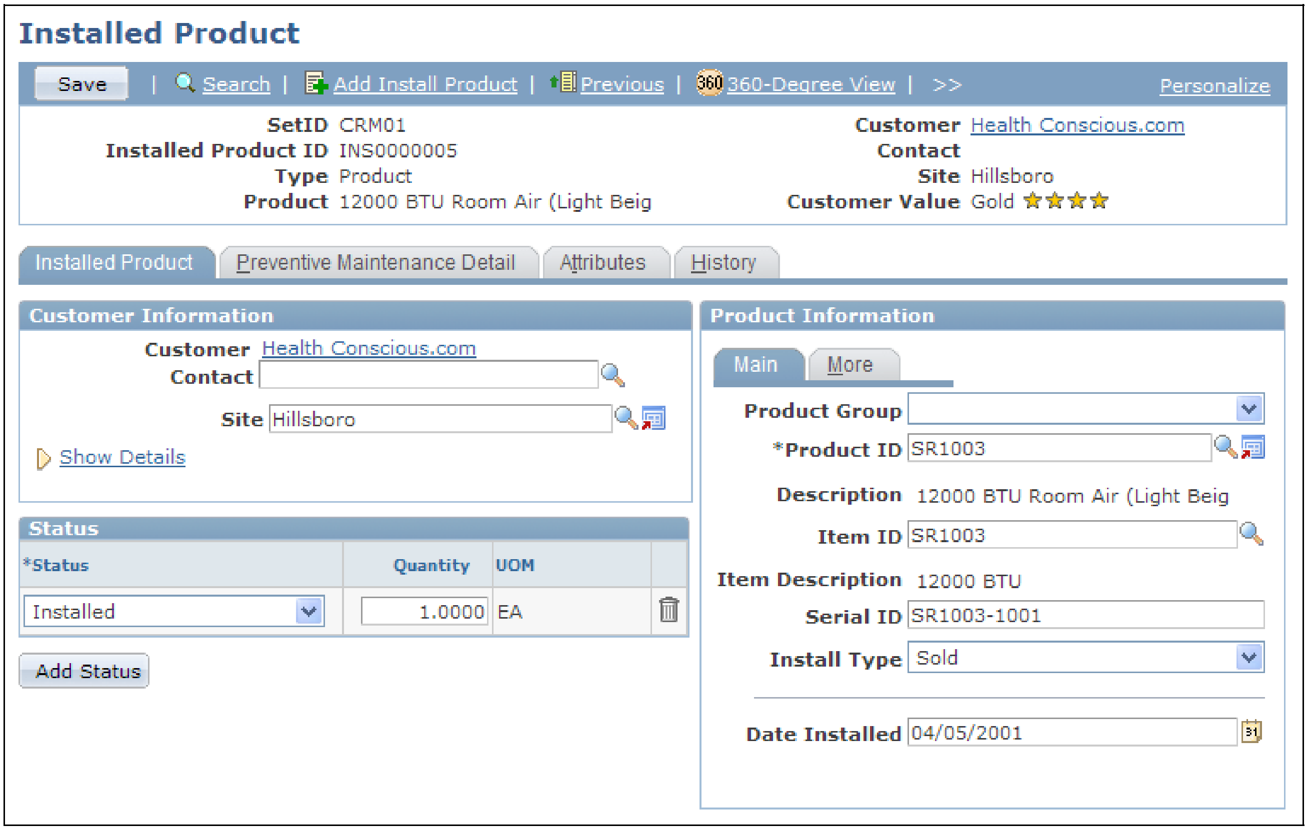
Pages Used to Manage Installed Products

Page Name	***Definition Name***	***Navigation***	***Usage***
Installed Product or Installed Assets	RF_INST_PRODUCT	• Installed Products, Installed Product, Installed Product • HelpDesk, Installed Assets, Installed Assets	Create or update installed products of any given type to track products (physical items or services) that are installed at customer sites or issued to internal workers.
Installed Product Address	RF_IPRD_ADDR	Click the Address link on the Installed Product page.	Add or update addresses for installed products.
Installed Product - Configuration and Attributes	RO_CAPTURELINE_DTL	Click the View Configuration link on the Installed Product page.	View order and configuration information that the system captures at the time of order entry for installed products that are ordered through PeopleSoft Order Capture or Order Capture Self Service. **Note.** The View Configuration link is only visible when the installed product is configurable (either Calico-configured or light-package configured). The system hides the link if the product is not configured.
Preventive Maintenance Detail	RF_INST_PROD_PM	Installed Products, Installed Product, Preventive Maintenance Detail	View or update pending preventive maintenance entries, or review the history of preventive maintenance entries for selected installed products. **Note.** Preventive maintenance details are only available to installed products that are serial number-controlled or asset tag-controlled.
Attributes	RB_ATTR_RUN_IPROD	Installed Products, Installed Product, Attributes	Capture installed product data that is specific to business or industry requirements.

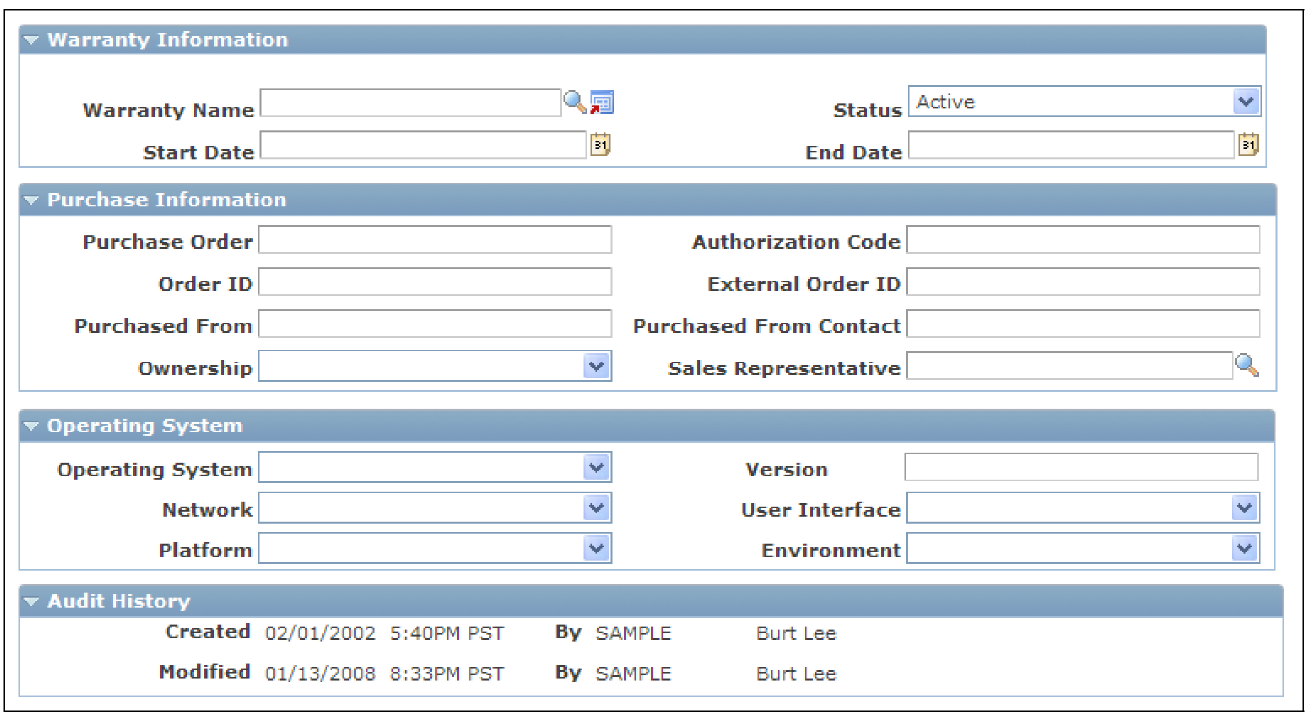
Page Name	***Definition Name***	***Navigation***	***Usage***
History	RF_INST_PROD_HIST	Installed Products, Installed Product, History	View information about events, audits, cases, and service orders that is associated with the installed product.
Related Orders for the Selected Services	RO_RELATED_ORDERS	Click the Related Order toolbar button on the Installed Product page.	View a list of service management orders that are associated with the installed product (of type *service* or *agreement*) and are currently in progress.
Links Summary	RF_LINK_SUMMARY	Installed Products, Installed Product, Links Summary	View the installed product's relationships with other associated installed products by link type and link status. This information applies only to multilevel installed products.
External Service Details	RF_EXT_SVC_DTL_SEC	Click the External Service link on the Installed Products page.	Displays information about the external service associated with a group offer member.

Entering Installed Product Information

Access the Installed Product page (Installed Products, Installed Product, Installed Product).



Installed Product page (1 of 2)



Installed Product page (2 of 2)

Note. You can also add installed products manually from the 360-Degree View page. However, this feature is not applicable to installed products (both multilevel or non-multilevel) for the Communications solution.

Toolbar Buttons

Create Order

Click to create a service management order for the corresponding installed product, which is either of type *service* or *agreement.* The customer of the new order comes from the installed product record.

For orders to be created successfully, the logon user who initiates this action must be associated with an order capture business unit, which is specified under Set Up CRM, Security, User Preferences. New orders are created using the order capture business unit of the logon user.

Note. If this button appears, the Related Order button does not appear.

Related Order

Click to access the Related Orders for the Selected Services page to view any queued or in progress service management orders that are created for the corresponding installed product, which is either of type *service* or *agreement.*

Note. If this button appears, the Create Order button does not appear. However, you can still choose to create an order on the Related Orders for the Selected Services page.

Customer Information

Use the fields in this section to record information about the customer.

Note. This section is labeled Owner Information for installed assets.

Customer

Enter the customer who owns or leases the installed product.

After a customer is selected successfully, its name appears as a link. Click the Customer link to transfer to the corresponding company or consumer record.

A customer can be a company or a consumer, which is created manually using the Company component (Customers CRM, Add Company).

First Name, Last Name, and **Contact**

Enter the first and last name of a company contact to whom the installed product is given. The system limits the selection of contacts to those that are associated with the selected customer. After a contact is selected successfully, the Contact field appears and replaces the First Name and Last Name fields.

Click the Transfer to Contact button to transfer to the corresponding person record.

You can add business contacts using the Person component (Customers CRM, Add Person).

Postal Enter a postal code to refine the customer and contact search.

Site Enter a site of the customer where the installed product is located.

Click the Transfer to Site button to transfer to the corresponding site record.

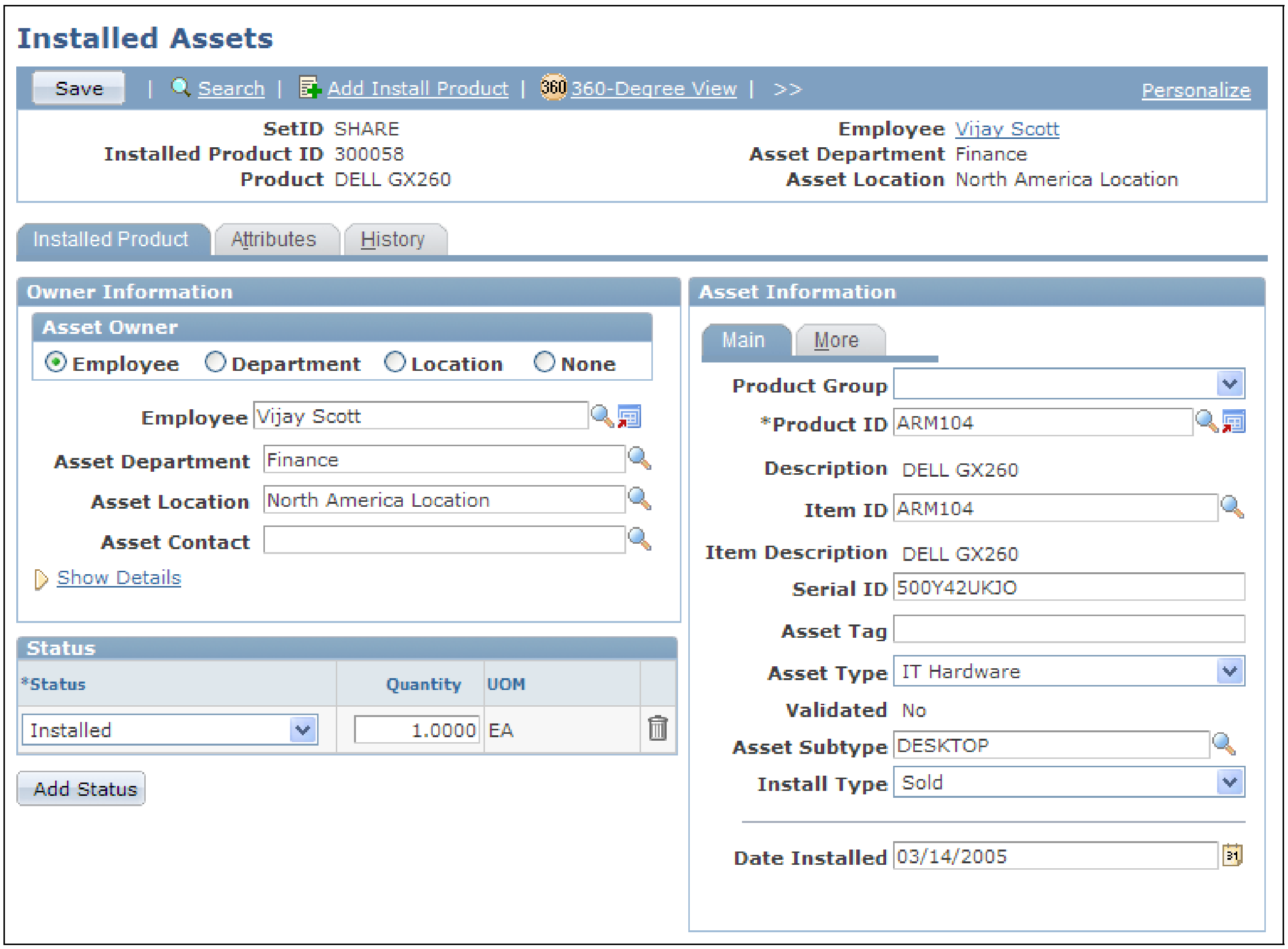
You can add sites for customers using the Company, Consumer, or Site component (Customers CRM, Add Site).

Phone Displays the phone number of the selected contact.

Location Details Enter notes about the specific area within the customer's site where the installed product is located.

Owner Information

This section replaces the Customer Information section if the currently opened installed product is of type *asset.*



Owner Information section of the Installed Assets page

Asset Owner	Select the owner of the asset, which can be: *Employee:* This is the default value. When selected, an employee must be specified. *Department:* When selected, an asset department must be specified. *Location:* When selected, an asset location must be specified. *None:* When selected, the only value you can optionally specify is asset contact. An AAF term called *Installed Asset Owner* is created for this field. **Note.** Because the CRM and Financials systems interpret *asset owner* differently, the Asset Owner field in these two systems are not mapped and the data is not published from the CRM to the Financials system.
Employee	Enter a worker for the installed asset. On the Installed Asset page, the system displays workers (employees) who are defined in the CRM system. Set up workers under Workforce, Worker. If an employee is specified but the selected asset owner is not *Employee,* a system message appears when the installed asset is saved. To correct the error, either reselect the asset owner based on the value that is being specified (employee in this case), or remove the employee value and specify another value that is required by the selected asset owner.
Asset Department	Enter the department that owns the asset. Choose from a list of active departments that are based on the setID of the installed asset. The system does not automatically default the employee's department as the value of the asset department in add mode. If an asset department is specified but the selected asset owner is not *Department,* a system message appears when the installed asset is saved. To correct the error, either reselect the asset owner based on the value that is being specified (asset department in this case), or remove the asset department value and specify another value that is required by the selected asset owner.
Asset Location	Enter the location where the asset resides. Choose from a list of active locations that are based on the setID of the installed asset. The system does not automatically default the employee's location as the value of the asset department in add mode. If an asset location is specified but the selected asset owner is not *Location,* a system message appears when the installed asset is saved. To correct the error, either reselect the asset owner based on the value that is being specified (asset location in this case), or remove the asset location value and specify another value that is required by the selected asset owner.

Asset Contact

Enter the employee to which the asset is assigned. Choose from a list of active employees that are based on the setID of the installed asset. The system does not automatically default the employee of the installed asset as the value of the asset contact in add mode.

If an asset contact is specified but the selected asset owner is not *None,* a system message appears when the installed asset is saved. To correct the error, either select *None* as the new asset owner, or specify another value that is required by the selected asset owner.

An AAF term called *BO ID of Asset Contact* is created for this field.

Department and **Location**

Displays the department and location of the employee selected for the installed asset.

Partner Information

Use the fields in this section to select a partner company and contact that is associated with the sale or installation of the installed product.

Note. This section is hidden if PeopleSoft Partner Relationship Management is not installed or if the installed product type is *Asset.*

Status

Status

Select the current status of the installed product. Available values are configured on the Define Status Translates page which is keyed by setID and are different by installed product type. The status of an installed product can be set manually (if the installed product is created manually) or automatically (if the installed product is generated by the system as a result of a business process).

Note. The system uses the Active Analytics Framework (AAF) to cascade the status and reason code of the parent installed product to its child installed products if the installed product status was not empty and the installed product status has changed. The parent status is cascaded only to those children whose status is equal to the original parent status. This policy is called *Installed Product Cascade Status* and is delivered for the *COM01* setID as an active policy.

See and Chapter 10, "Tracking Installed Products," Defining Status Translate Values for Installed Products, page 175.

Quantity

Enter the quantity (in the standard unit of measure) of the installed product in the indicated status. If the item is serial-controlled, the quantity is set to *1* by default.

You must enter a nonzero value for each row of status before saving the installed product. Multiple rows appear for partial shipments of an installed product order to indicate the status for each quantity.

You can add rows manually as necessary to indicate the quantity of an installed product in repair, uninstalled, and so forth.

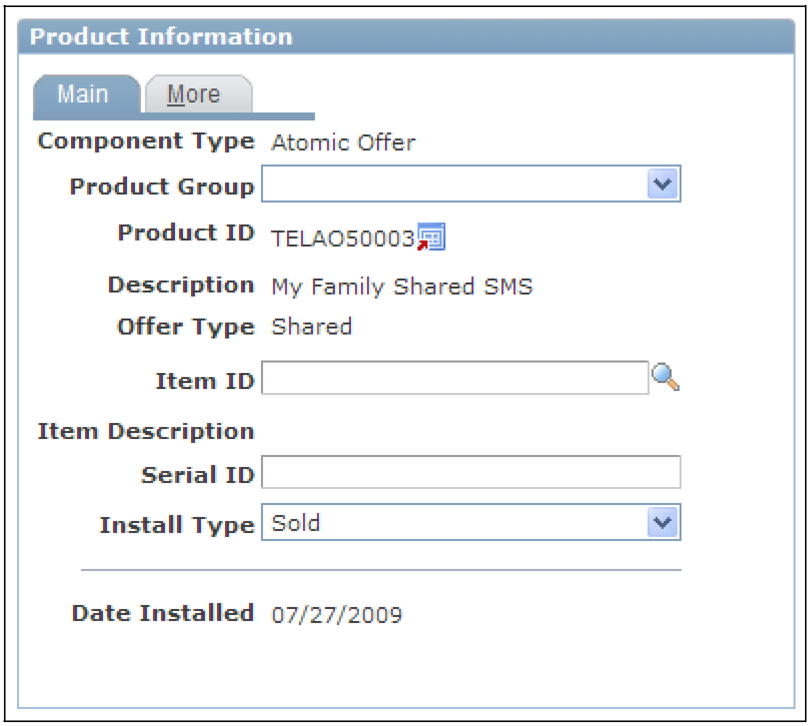
UOM (unit of measure)

Indicates the unit of measure being used for the quantity. For example, package, each, pallets, and so on.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Field Values," Modifying Industry-Specific Translate Values.

Product Information

Use the fields in this group box to enter product information.



Product Information: Main section of the Installed Product page

For installed assets, this section is labeled Asset Information.

Note. Depending on the installed product type, some of the fields in this section are hidden because they do not apply. For example, fields that are specific to installed products, such as Item ID, Item Description, Serial ID, Date Shipped, and Date Installed are not applicable and therefore are not visible in installed services.

Component Type

Displays the component type of the product definition that the installed product represents.

This field is applicable to multilevel installed products only.

Product Group

(Optional) Select a product group to refine the list of products available for selection. This field lists all the product groups of all types that are associated with the setID of the installed product.

If you select a product for the installed product and that product happens to belong to only one product group, the system automatically populates that product group value in this field.

Product groups are effective dated in installed product records. It means that if you open an installed product created some time ago and the product group that it references is no longer active, the value is not displayed. However, if you search for installed products by product group on the search page, product groups are not effective dated.

Note. If multiple product groups have the same name and description but different types, then only one instance of this product group appears as an available value (the description appears). And if you select this product group, the system makes all products that are associated with all product groups using this name available for selection.

Similarly, suppose that multiple product groups have the same name (for example, dishwasher) but different descriptions (for example, DW-Acct and DW-Gen) and types (for example, Acct and General). In this example, if you select one of the two product groups, which have different descriptions but share the same product group code, PeopleTools picks the first available entry in the product group base table (PROD_GROUP_TBL) and displays the value, and in this case it is DW-Acct. Therefore, if you select the DW-Gen product group, the system overrides your selection to DW-Acct because DW-Acct comes before DW-Gen alphabetically in the product group base table.

An AAF term called *Product Group* is created for this field.

Product ID

Enter the ID of the product that is installed at the customer site or worker's internal location. Establish products using the Product EIP or the Product Definition component. If the product is associated with an item, the system populates the item ID as well.

Under certain circumstances, the system displays a link next to the Product ID field. This link transfers users to the Service Management page in Order Capture to create a new order for the service. The system prepopulates the customer and product information. For the link to appear, the following must be true:

- The Installed product must be a service or an agreement.
- The option to show the button must be selected in the configuration.
- The installed product cannot have a parent installed product.
- The user must have authorization to create a new service management order.
- If entering an installed service (not an agreement), the product ID associated with the installed service must either have the Service Required flag selected or it must be a service-type product that is not a service feature.
- Energy services are prohibited from using this link because the type of service management order cannot be determined automatically (start, stop, or transfer service). Thus, this link is hidden for energy services.

Note. This link also appears as a button on the Installed Product Hierarchy page.

Product ID is in read-only mode for multilevel installed products.

View Configuration

Click to access the Installed Product - Configuration and Attributes page to view the configuration details and pricing information of the product.

This link is hidden if the currently opened installed product is a multilevel installed product.

Note. Configuration details are available only for configured products that are ordered through PeopleSoft Order Capture or Order Capture Self Service. This link is only visible for installed products that are configured through Advanced Configurator or the Lightly Configurator.

Offer Type

Displays the offer type associated with the order line.

Values are *Shared* and *Group.*

When you select the Group offer type, the Bundling Type field appears and becomes available for use.

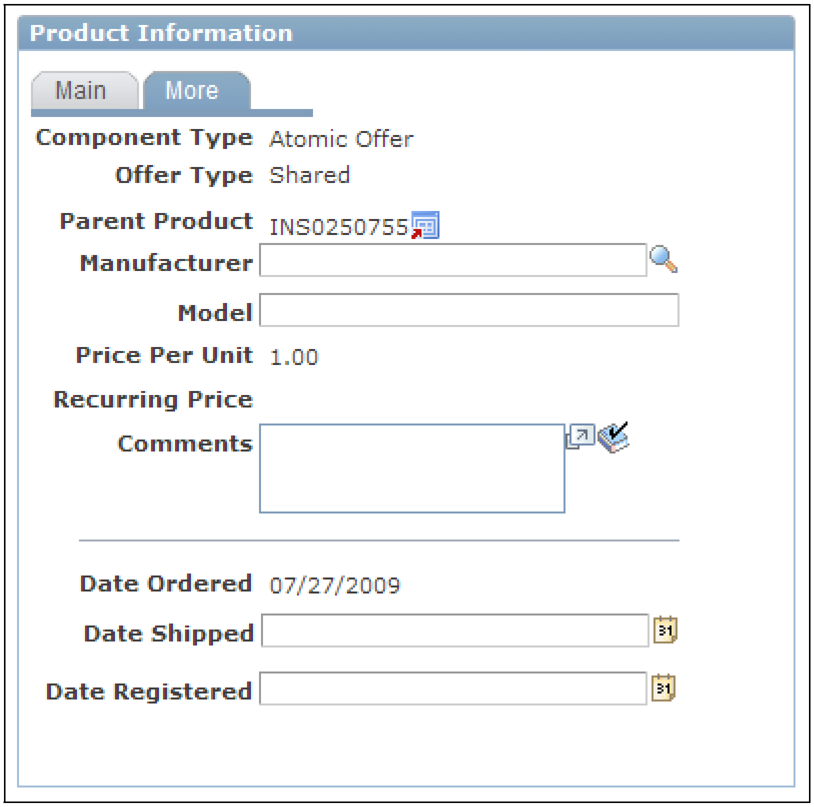
Bundling Type	Displays information about how group offer members relate to the offer. Available values are: *Individual Services:* All members link to a single instance of the shared service that is sold by the group offer. *Dedicated Services:* Each member links to a separate, dedicated instance of the shared service that is sold by the group offer.
Item ID	Enter the ID of the item that is installed at the customer site. Establish items using the Item Master EIP or the Item Definition component. Item ID is in read-only mode if the currently opened installed product is a multilevel installed product.
Serial ID	Enter the serial number if the item is serial-controlled.
Install Type	Select the reason why the product was installed at the customer site (for informational purposes only). Values are *Beta, Demo, Evaluation, Loan,* and *Sold.*
Date Installed	Enter date of installation if you are creating or updating installed products or installed assets manually. The system populates this field, as applicable for the given transaction, when it creates or updates installed products or installed assets. This field is not available to installed services.
Start Date and **End Date**	These fields appear for installed services for service management purposes. Start date and end date are in read-only mode if the currently opened installed product is a multilevel installed product.
Suspend Date	Displays the date when the status of the installed service has changed to *suspended.* This field is available to installed services only and appears if such a value is available for the corresponding installed service.
Resumption Date	Displays the date when the installed service resumes the *Activated* status. This field appears if a service management order was submitted to resume the installed service that was previously suspended or disconnected.
Disconnect Date	Displays the date when the installed service becomes disconnected. This field is available to installed services only and is displayed if such value is available for the corresponding installed service, which is currently in one of these statuses: *Disconnected* or *Pending Disconnection.*
Schedule	Displays the schedule for the installed service, if such value is available.
Duration and **Unit Of Measure**	Displays the length of duration of the corresponding installed commitment.

Commitment Contract

Displays the ID of the commitment contract that is created for the corresponding installed commitment. Clicking this link transfers you to the commitment contract.

This field is available to installed commitments only.

Access the More tab.



Product Information: More tab of the Installed Product page

Component Type

Displays the component type of the product definition that the installed product represents.

This field is applicable to multilevel installed products only.

Parent Product

Enter another installed product to define as the parent of this installed product. View parent, child, and sibling relationships between installed products on the Installed Product Viewable Hierarchy page.

This field displays the ID of the installed product that is the immediate parent of the installed product currently opened (if it is a multilevel installed product. This field is hidden if the multilevel installed product is created for the top-level component of the multilevel product bundle or a functional component.

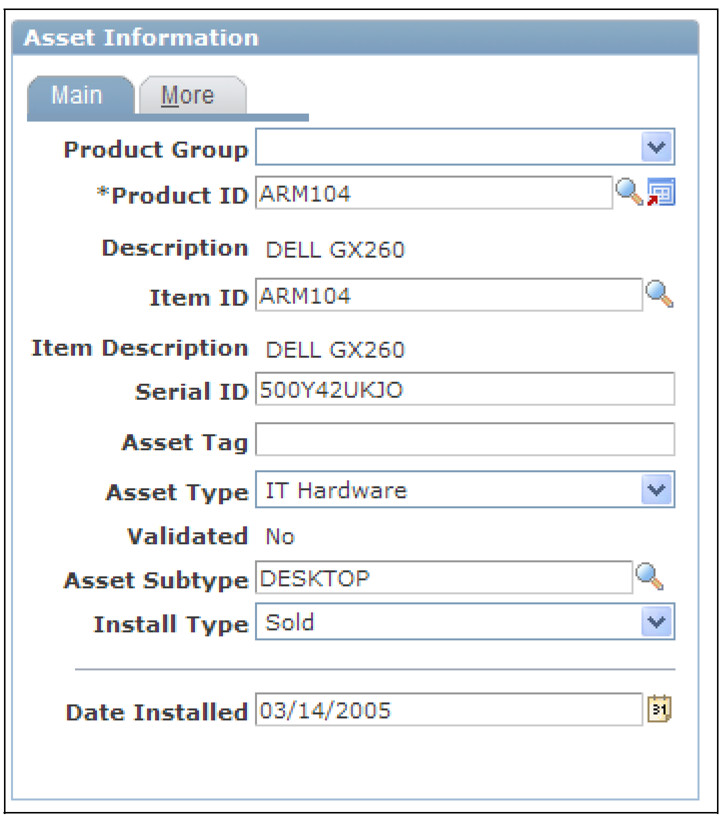
Manufacturer

Select the manufacturer of the product. You set up manufacturers on the Manufacturers page (Set Up CRM, Common Definitions, Manufacturers).

Price Per Unit	Displays the price of the product per unit if such value is available.
Recurring Price	Displays the recurring for the product or service if such value is available.
Service Note	Displays remarks from the system about the installed service that is for a temporary service, if applicable. For example, the service note reads *Temporarily Suspended* when the temporary service is suspended.
Date Ordered, Date Shipped, and **Date Registered**	Enter dates if you are creating or updating installed products or installed assets manually. The system populates these fields, as applicable for the given transaction, when it creates or updates installed products or installed assets. The Date Registered field does not apply to installed assets. The Date Shipped field does not apply to installed services. Date ordered is in read-only mode if the currently opened installed product or service is a multilevel installed product.

Asset Information

The Product Information section is renamed Asset Information for installed assets. In addition to the fields described in the Product Information section, this section also contains fields that pertain to installed assets.



Asset Information section of the Installed Assets page when asset integration option is enabled

Asset Tag Enter the asset tag that is available if the item is issued an internal worker.

These fields appear if the Enable Asset Integration with PeopleSoft Financials option is enabled in the general option of the display template.

Note. These fields (Validated,Asset Type,Asset Subtype and Transfer) must be enabled in the display template in order for them to be shown when the asset integration option is enabled.

Validated Indicates whether or not the data in the installed asset has been validated. Values are *Yes* and *No.*

Asset Type Specify a type for the installed asset.

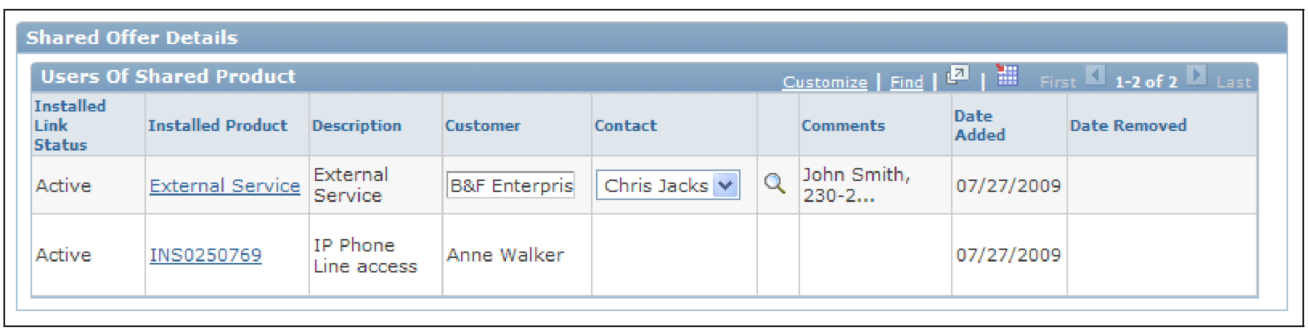
Asset Subtype Specify a subtype for the installed asset. Available values are filtered by the selected asset type.

Shared Offer Details - Users of Shared Product

This section appears if the installed product or service in the header is a shared offer (an atomic offer that is a shared offer and is related to a shared service, a functional component, through the *Sells* relationship). It lists the installed products that are currently using the shared offer, with information such as the installed product ID, product description, the owner (the customer) of the installed product and the contact of the owner.

As delivered, this section is available to installed products belonging to multilevel product bundle hierarchies for the Communications solution (setID=COM01) only.

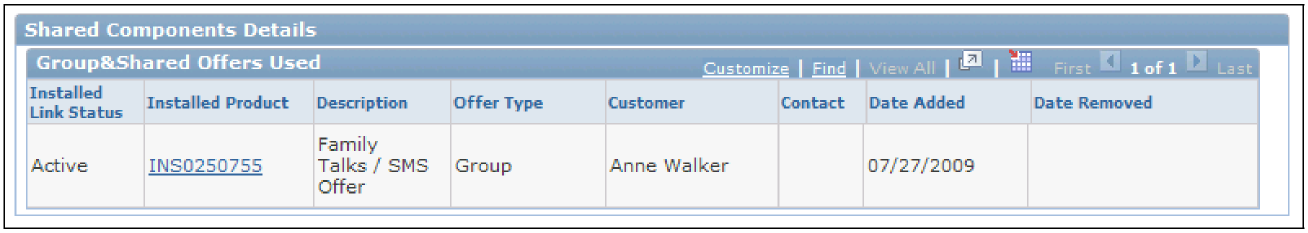
This section does not show any data if the installed shared offer in the header has not yet shared its resources with any other installed products.



Shared Offer Details - Users Of Shared Product section of the Installed Products page (for multilevel installed products)

Shared Component Details - Group&Shared Offers Used

This section appears if the installed product or service in the header is currently using a shared offer. It lists the shared resources that are being used by the installed product in the header, with information such as the ID of the installed shared offer, product description, the owner (the customer) of the installed shared offer and the contact of the owner.



Shared Components Details

Group&Shared Offers Used — Customize | Find | View All | First 1 of 1 Last

Installed Link Status	Installed Product	Description	Offer Type	Customer	Contact	Date Added	Date Removed
Active	INS0250755	Family Talks / SMS Offer	Group	Anne Walker		07/27/2009	

Shared Components Details - Group&Shared Offer Used section of the Installed Products page (for multilevel installed product or installed service)

As delivered, this section is available to installed products belonging to multilevel product bundle hierarchies for the Communications solution (setID=COM01) only.

Group Offer Details - Users of Group Product

This section appears if the installed product or service in the header is a group offer. It lists the installed products that are currently using the group offer, with information such as the installed product, product description, customer of the installed product, and the contact of the owner.

Group Offer Details

Users Of Group Product — Customize | Find | First 1-2 of 2 Last

Installed Link Status	Installed Product	Description	Customer	Contact		Comments	Date Added	Date Removed
Active	INS0250769	IP Phone Line access	Anne Walker				07/27/2009	
Active	External Service	External Service	B&F Enterpri:	Chris Jack:		John Smith, 230-2...	07/27/2009	

Group Offer Details - User of Group Product grid

The Installed Link Status displays the installed link status, which indicates whether the service is a member of the group offer.

The Installed Product link displays the installed product ID for the service. Click the link to access the Installed Product page to view details about the service. An External Service link displays when the installed product is an external service. Click the link to access the External Service Details page and view details about the service.

Note. As delivered, this section is available to installed products belonging to multilevel product bundle hierarchies for the Communications solution (setID=COM01) only.

Group&Shared Offer Membership Details - Group&Shared Offers Used

This section appears if the installed product or service in the header is a group offer. It lists the shared resources that are being used by the installed product in the header, with information such as the installed product, product description, customer of the installed product, and the contact of the owner.

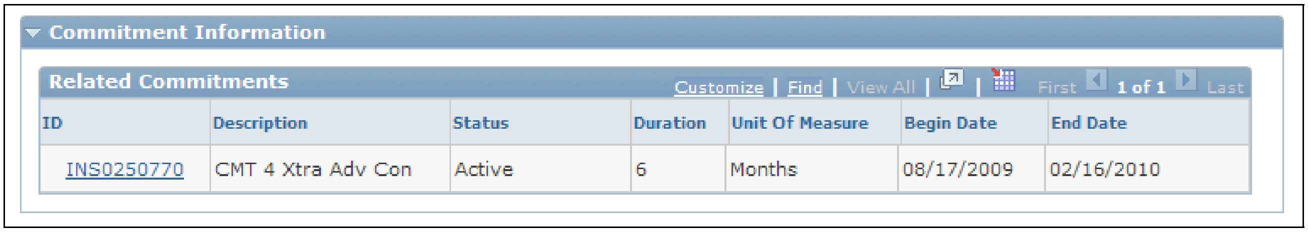
The Installed Link Status displays the installed link status, which indicates whether the service is a member of the group offer.

The Installed Product link displays the installed product ID for the service. Click the link to access the Installed Product page to view details about the service. An External Service link displays when the installed product is an external service. Click the link to access the External Service Details page and view details about the service.

Note. As delivered, this section is available to installed products belonging to multilevel product bundle hierarchies for the Communications solution (setID=COM01) only.

Commitment Information

If at least one commitment is assigned to the installed product that's currently opened, this section appears and displays commitment data.



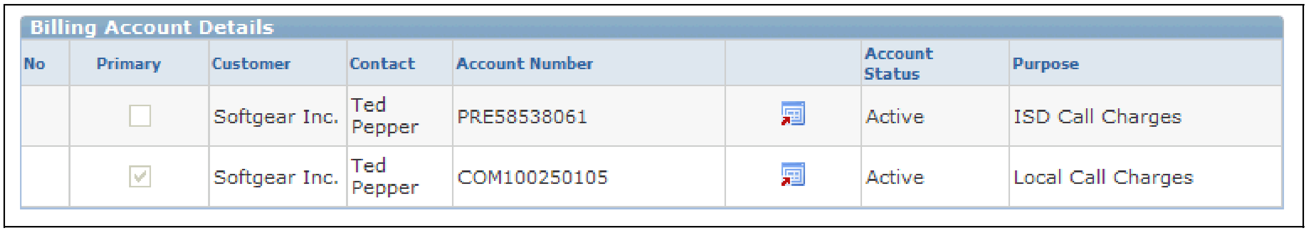
Commitment Information section of an installed commitment

ID and **Description**	Displays the identifier and description of the related installed commitment. Click the ID link transfers you to the corresponding installed commitment record.
Status	Displays the current status of the related installed commitment.
Duration	Displays the duration of the related installed commitment.
Unit of Measure	Displays the duration's unit of measure of the related installed commitment.
Start Date and **End Date**	Displays the period during which the related installed commitment remains valid for the installed product it covers.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working with Orders for Multilevel Product Bundles," Commitment Configuration Rules.

Billing Account Details

This section displays applicable billing account information for the current installed product in read-only mode. The number of billing accounts shown is based on what has been defined in its associated product definition. For non-split billing products, the number is one; for split billing products, the number is at least one. Thus section is not visible if the associated product definition is not defined as *billing account selectable* (which means that the product is not billable and therefore billing accounts are not used). Changes to billing accounts in relation to the installed product (such as removing a billing account from the installed product) needs to be initiated in service management orders.



Billing Account Details section of an installed product

No (number) — Displays the sequence number of the corresponding billing account. This information comes from the associated product definition.

Primary — Indicates, when selected, that the corresponding billing account is the primary account for the installed product and product definition. This column appears only if the associated product is a split billing product (with the Split Billing option selected in its definition).

Customer and **Contact** — Displays the owner of the billing account, which is the *bill-to* customer of the account. These fields are not visible if split billing is not allowed at the customer level.

Account Number — Displays the number of the corresponding billing account. Click the adjacent Transfer to Account button to access the corresponding CRM billing account record. From the record, you can see a list of installed products that it pays for, fully or partially (in the case of split billing products).

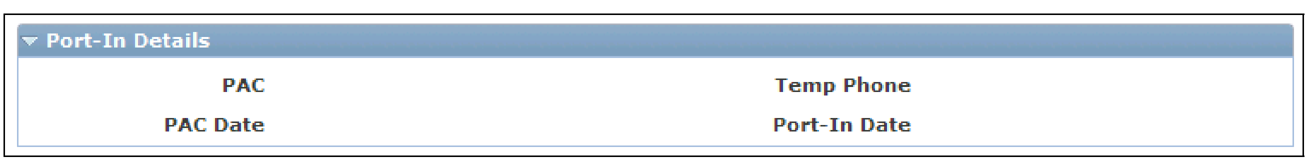
See and *PeopleSoft Bill Presentment and Account Management 9.1 PeopleBook*, "Managing Accounts and Viewing Bills in the Communications and Energy Industries," Managing Accounts.

Account Status and **Purpose** — Displays the status and purpose of the corresponding billing account that is currently assigned to the installed product. The information about account purpose comes from the associated product definition.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working with Orders for Multilevel Product Bundles," Orders and Service Management.

Port-In Details

Use the fields in this group box to track port-in dates, port authorization codes (PAC), PAC dates, and temporary phone numbers for wireless carriers outside of the U.S. who authorize the transfer of mobile numbers from one carrier to another. The PAC Date is the date the current PAC expires. PAC dates are valid for 30 days from issue.

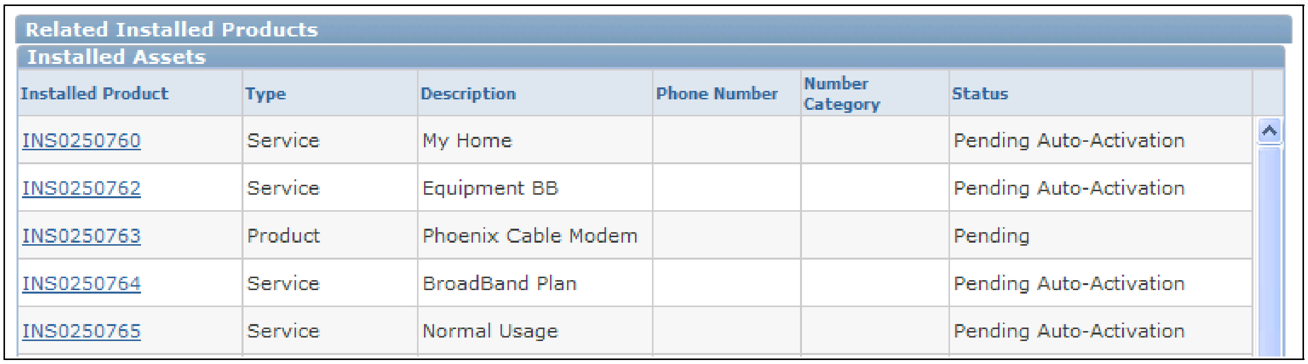


Port-In Details section of the Installed Product page (Communications-specific)

Note. PAC codes are issued by the existing carrier and are required by the new carrier. The PAC date is provided while porting-in the wireless number. The temporary phone number is assigned to the wireless service during mobile number portability. Port-in dates refer to the action of signing up for wireless service and using an existing mobile phone number. PAC Date is the date the current PAC expires. They are valid for 30 days from issue.

Related Installed Products

This section displays basic information of installed products that are associated with this installed product in the installed product hierarchy. For example, if the installed product that is currently opened is for a wireless phone plan, its related installed products can be those that are created for the plan's service features, such as *web browser,200 anytime minutes* and *caller ID.*


Related Installed Products
Installed Assets

Installed Product	Type	Description	Phone Number	Number Category	Status
INS0250760	Service	My Home			Pending Auto-Activation
INS0250762	Service	Equipment BB			Pending Auto-Activation
INS0250763	Product	Phoenix Cable Modem			Pending
INS0250764	Service	BroadBand Plan			Pending Auto-Activation
INS0250765	Service	Normal Usage			Pending Auto-Activation

Related Installed Products section of the Installed Products page

Registration

Date Registered

Enter the date when the product is registered and the installed product is created or updated. If this installed product is registered using the Product Registration component, this field displays the date when the registration is submitted.

Warranty Information

Only one warranty can be associated with an installed product.

Note. As delivered, this section is not available to installed agreements.

Warranty Name

Enter the warranty that is associated with the item. Click the Transfer to Warranty button to access the component you use to define warranties.

Status

Select the current status of the warranty for the installed product, either *Active* or *Inactive.* For entitlement searches from cases or service orders that reference an installed product, the system first checks for an active warranty that is valid for the current date.

Start Date and **End Date**	Enter the dates when the warranty period begins and ends for the installed product. The system populates start date automatically using the install, ship, or order date for the installed product, depending on the start date option that the warranty definition specifies. The default end date is based on the length that the associated warranty definition specifies.

Purchase Information

This section is in read-only mode if the currently opened installed product is a multilevel installed product.

Purchase Order	Enter the customer's purchase order number for the installed product.
Authorization Code	Enter the authorization code that the credit card company provides, if applicable.
Order ID	Enter the order identification number for the installed product.
External Order ID	Enter the customer's order identification number for the installed product, if it exists.
Purchased From	Enter the name of the customer the installed product is purchased from.
Purchased From Contact	Enter the name of the contact the installed product is purchased from.
Ownership	Select whether the customer owns the installed product or possesses it under the terms of a lease or rental agreement.
Sales Representative	Enter the name of the sales representative who is associated with the order for the installed product. If your installation includes PeopleSoft Sales, the system prompt for this field lists the people who are defined as sales force representatives in the system.

Operating System

The fields in this group box are relevant to installed computers, computer software, and computer accessories, and are for information purposes only. Enter or select the information from the fields that appear in this group box.

Note. As delivered, this section is not available to installed agreements or installed services.

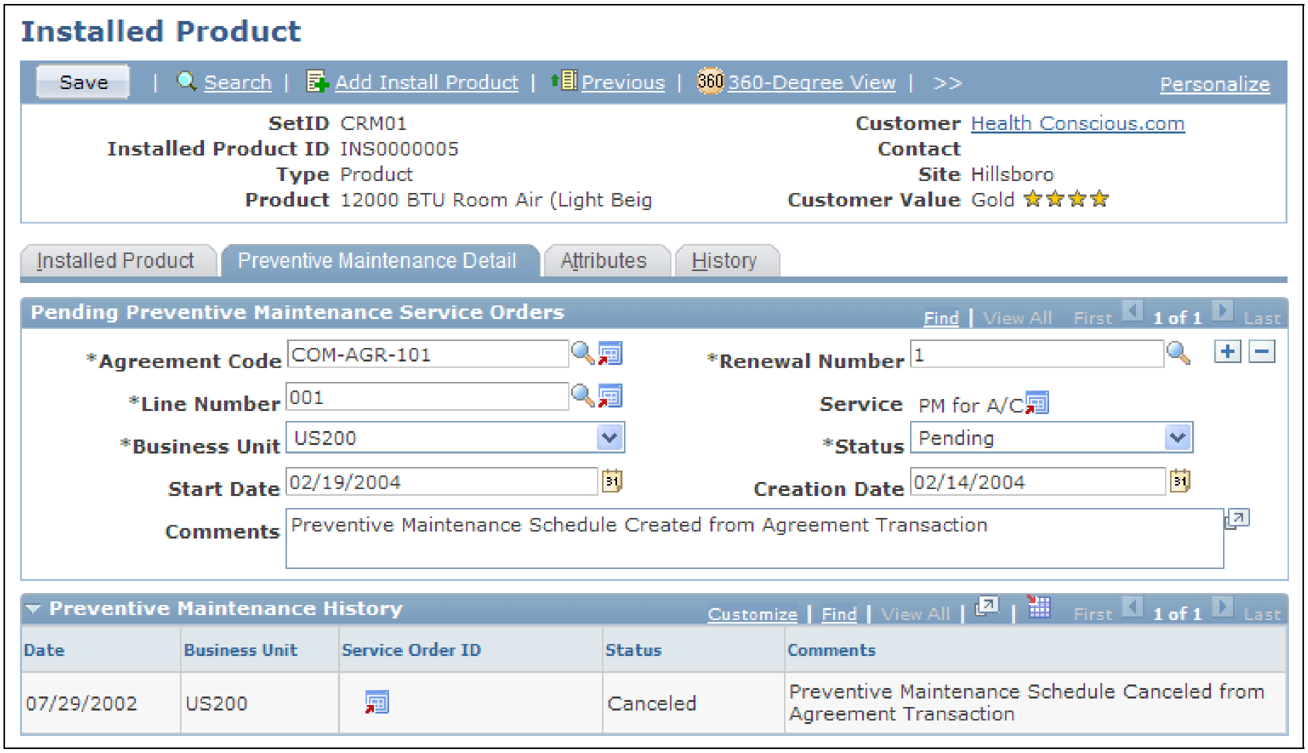
See Also

PeopleSoft Integrated FieldService 9.1 PeopleBook, "Creating and Managing Service Orders," Service Order Toolbar Functions

Viewing Preventive Maintenance Details

Access the Preventive Maintenance Detail page (Installed Products, Installed Product, Preventive Maintenance Detail).

Note. If you are adding a service or asset, the system does not display this page. Preventive maintenance details are only available to installed products that are serial number-controlled or asset tag-controlled.



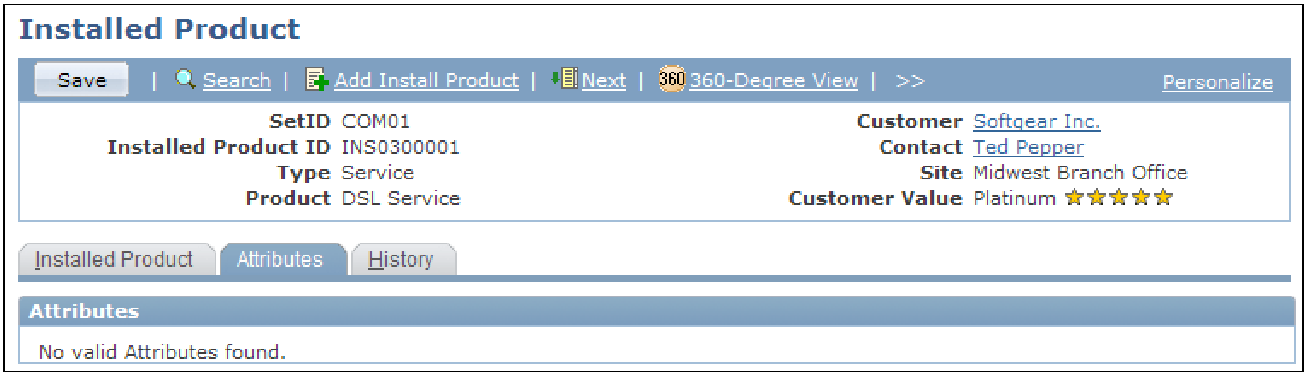
Preventive Maintenance Detail page

Use this page to view the preventive maintenance history of the installed product. You can also preview and update information about the upcoming preventive maintenance service using the agreement code, renewal number, line number, business unit, status start date, and creation date.

See and *PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Working with Scheduled Preventive Maintenance," Managing Scheduled Preventive Maintenance.

Entering Attributes

Access the Attributes page (Installed Products, Installed Product, Attributes).



Attributes page

Attribute groups and attributes that are associated with the Installed Product component appear on this page if their conditions are evaluated to true.

Depending on the setup, an attribute field can be an edit field or a drop-down list box, which can be set as display-only or available for edit.

Note. All attributes defined for multilevel product components appear in read-only mode, regardless of the setting for *Installed Product* object type.

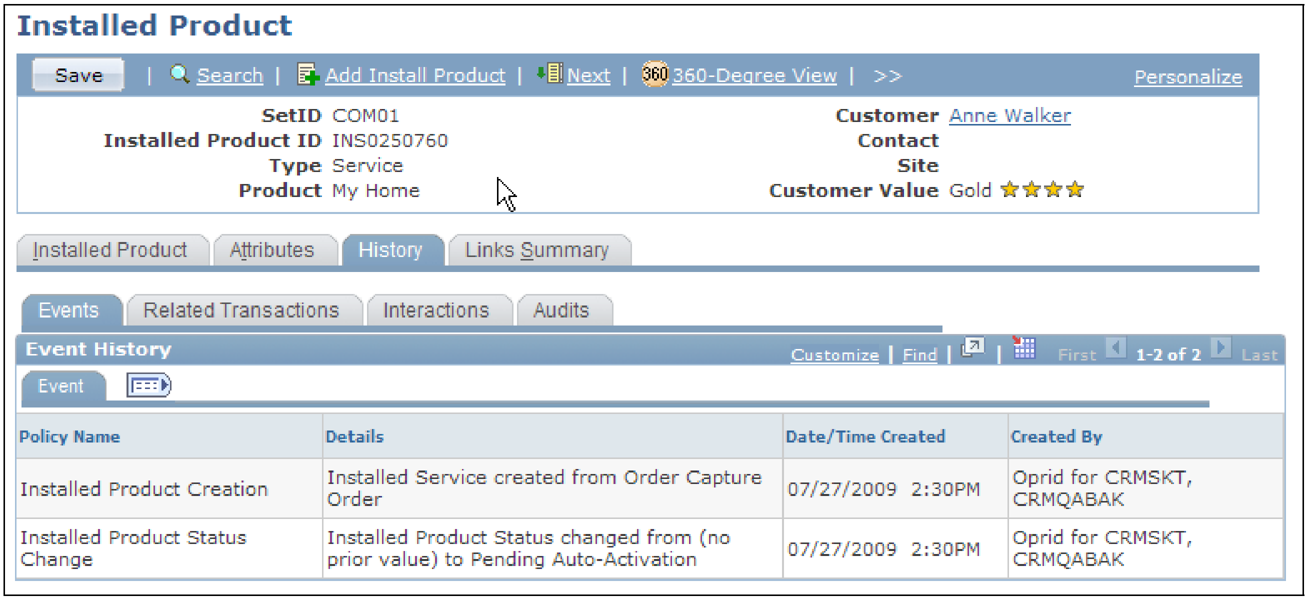
An attribute field can be set as hidden from this page on the Object Type Attributes page for the *Installed Product* object type.

Refer to the Configuring Attributes chapter for more information on using and setting up attributes in PeopleSoft CRM.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Attributes."

Viewing Installed Product History Logs

Access the History page (Installed Products, Installed Product, History).



Installed Product - History: Events page

History - Events

Click the Events tab to view events that are associated with the installed product.

As delivered, the CRM system generates logs for these installed product events based on the setID in which they occur:

Policy Name	***Description***	***Logging Availability (setID)***
• Installed Service New Order • Installed Service Change Order	Creation of new orders or change orders for installed products of type *service*, showing a high-level view of each service activity.	• CRM01 • COM01 • ENRGY
Installed Product Parent Change	Changes in the parent-installed product ID, showing old and new values.	• CRM01 • COM01 • ENRGY • ITHD1

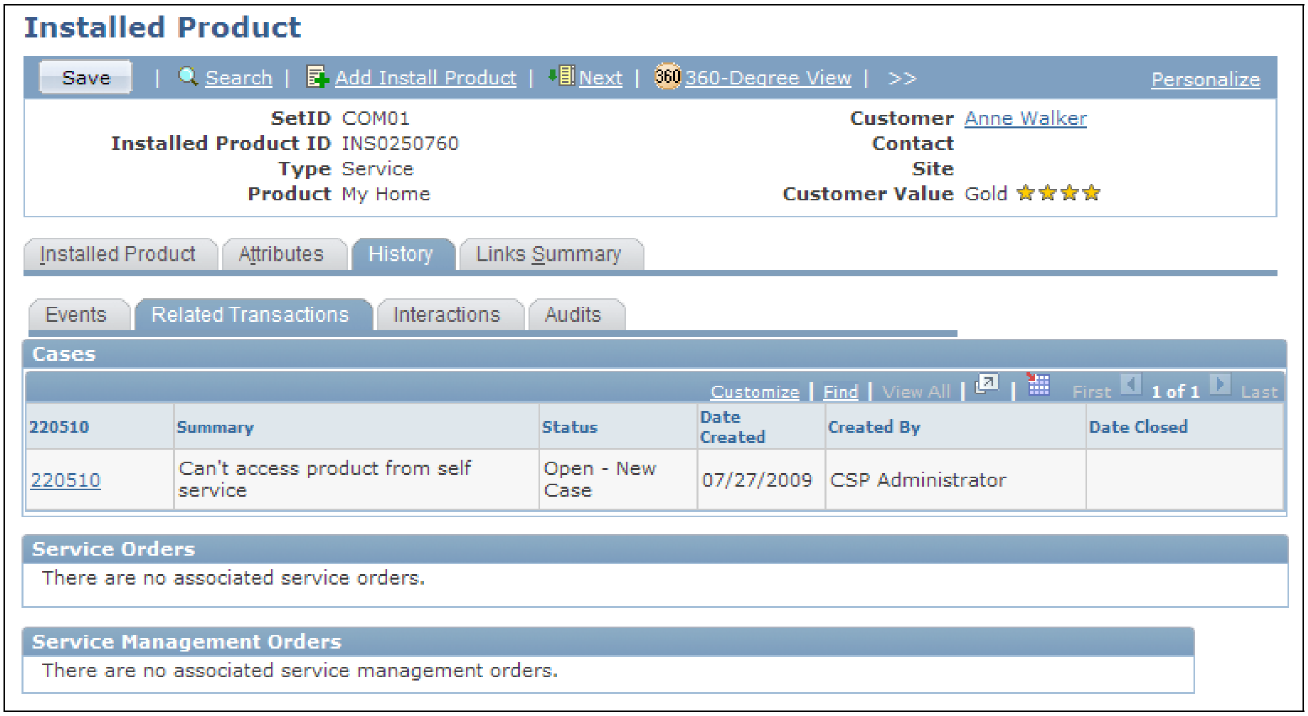
Policy Name	***Description***	***Logging Availability (setID)***
• Installed Product Creation • CSS:Installed Product Creation	Creation of installed products, showing where they were created from.	• CRM01 • COM01 • ENRGY • ITHD1 • SHARE • HTECH • IPROD
• Installed Product Configuration Change • CSS:Installed Product Configuration Change	Changes in the configuration code, showing the old and new values (only for configured products by Advanced Configurator), including links to display the old and new configuration.	• CRM01 • COM01 • ENRGY • ITHD1 • HTECH • IPROD
• Installed Product Status Change • CSS:Installed Product Status Change	Changes in status, showing the old and new values.	• CRM01 • COM01 • ENRGY • ITHD1 • SHARE • HTECH • IPROD
• Installed Asset Employee Transfer • Installed Asset Department Transfer	Employee and department transfers, including old and new values (for installed products of type *asset* only).	• CRM01 • ITHD1

The event logging functionality is delivered through the AAF. You can create new policies to capture additional event logs based on the delivered ones. Refer to the *PeopleSoft 9.1 PeopleBook: Active Analytics Framework* for detailed documentation on AAF.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook,* "Working with Active Analytics Framework," Understanding AAF.

History - Related Transactions

Click the History - Related Transactions page to view the cases, services orders, and service management orders that are associated with the installed product.



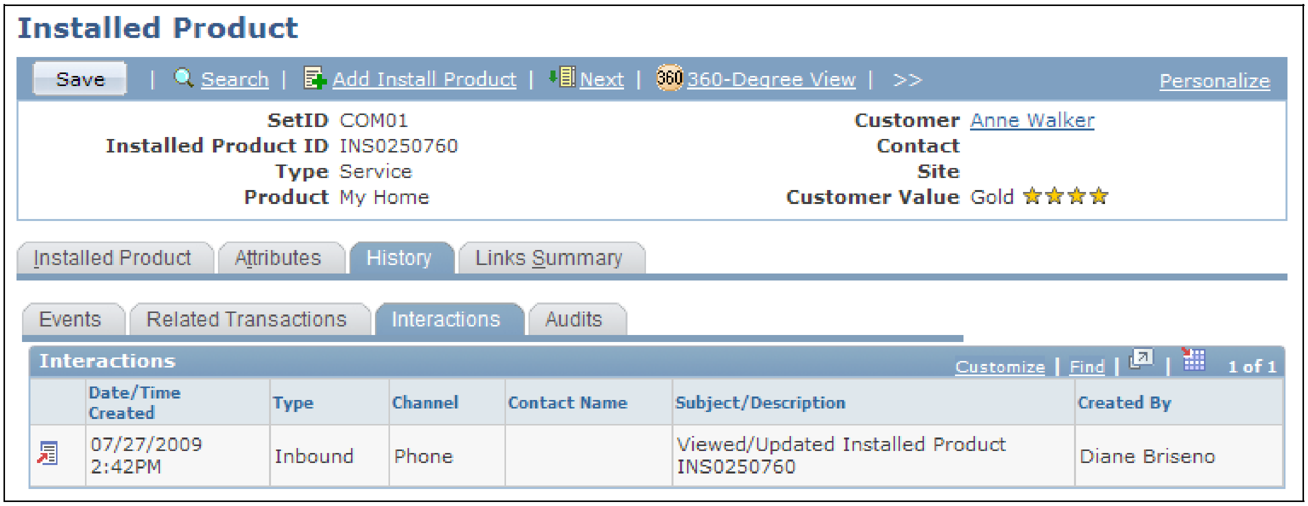
Installed Product - History: Related Transactions page

This page displays summary information for each related transaction. Click the order ID link to transfer to the corresponding transaction record. As delivered, the section for service management orders is available only to installed products of type *service*, and the section for change requests is available only to installed products of type *asset.*

For performance and usability purposes, each section displays a maximum of 10 transactions at a time. If the installed product is associated with more than 300 counts of the same type of transaction, only the first 300 appear.

History - Interactions

Click the History - Interactions page to view the summary information of all interactions (for example, phone and email correspondence) that have been created for the installed product.

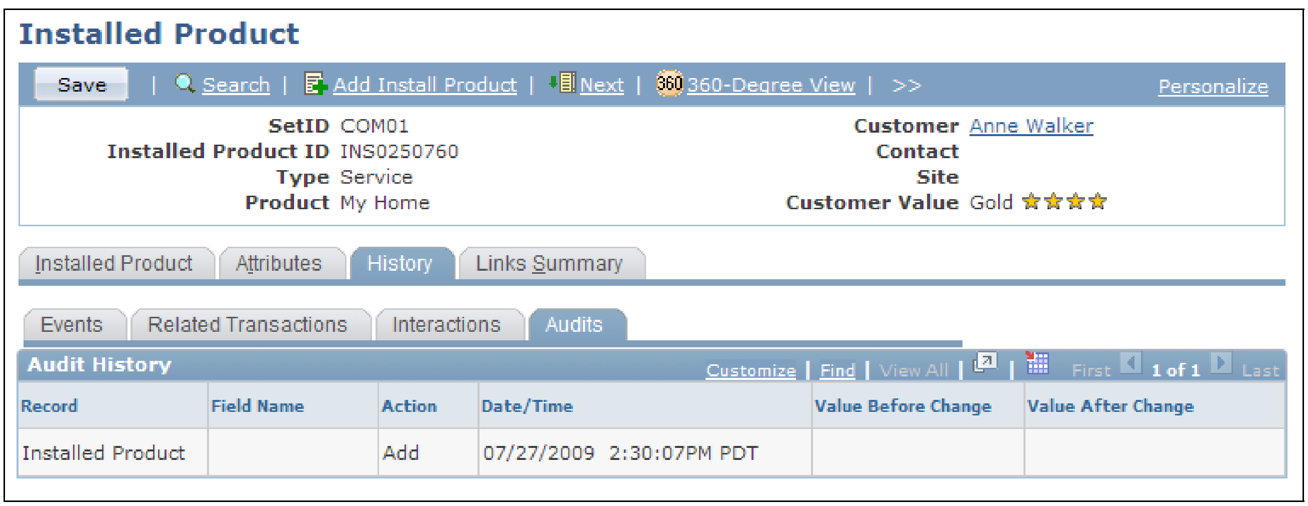


Installed Product - History: Interactions page

Click the Go To Interaction Detail button to access the Interaction page to view detailed information about the interaction.

History - Audits

Click the History - Audits page to display changes to the records and fields that are associated with the installed product.



Installed Product - History: Audits page

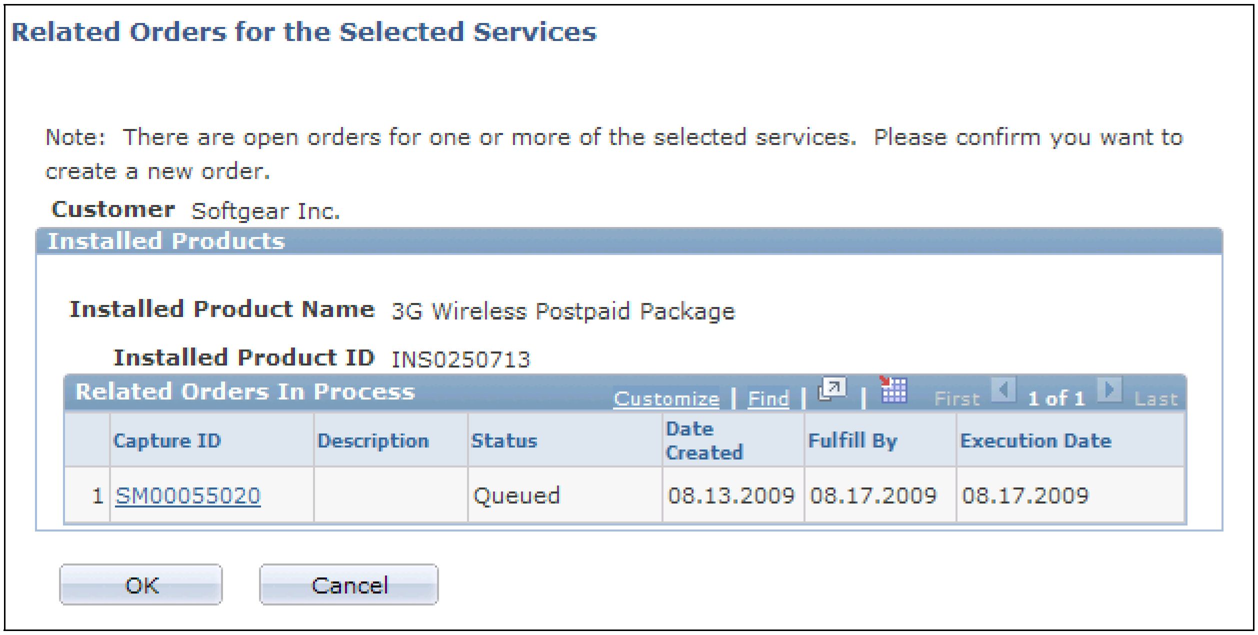
The system displays previous and new values for the fields that have changed. The system displays all fields from both the installed product main record as well as the installed product status record.

Note. At delivery, auditing is turned off by default. It must be enabled using PeopleSoft Application Designer. The audit record for Installed Product is RF_INST_PROD_AT. This record contains the fields from the records on which auditing must be enabled, if desired: RF_INST_PROD (the main installed product record), RF_INST_PROD_ST (the status record), and RF_INST_PROD_PM (the preventive maintenance record).

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up Auditing for Cases and Inbound Email."

Viewing Related Orders

Access the Related Orders for the Selected Services page (click the Related Order toolbar button on the Installed Product page).



Related Orders for the Selected Services page

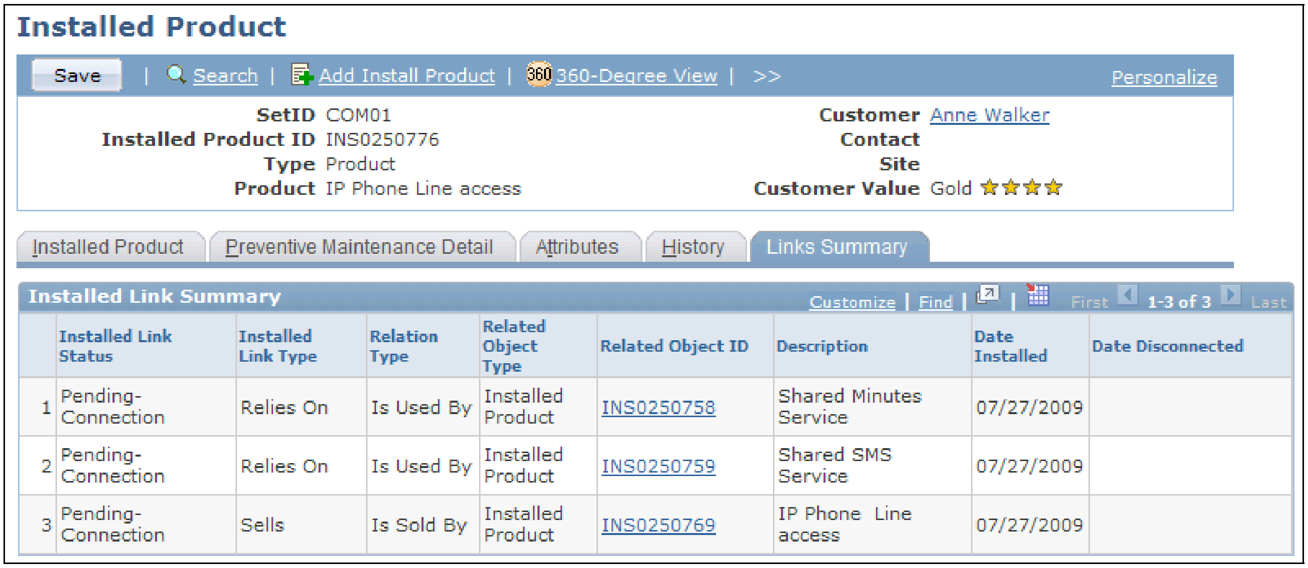
This page lists all the service management orders that are related to any given installed product (of type *service* or *agreement*) and currently in progress. Click the capture ID link to transfer to the corresponding service management order.

OK	Click to create a new service management order.
Cancel	Click to exit this page and return to the Installed Product page.

Viewing Multilevel Installed Product Relationships

Access the Links Summary page (Installed Products, Installed Product, Links Summary).

Note. This page is available only to installed products and services that are part of multilevel installed products.



Links Summary page for a functional installed product, which is sold by a commercial installed component and is dependent on by other functional installed products

Installed Link Status

Displays the current status of the installed link.

Installed link statuses are delivered for the *COM01* setID. They are established in the Define Status Translates page.

Installed Link Type

Displays the type of the installed link. Values are:

- *Brings and Removes*
- *Sells*
- *Relies On*

Relationship Type

Displays the relationship between the two installed products in the installed link from the perspective of the installed product in the header. Available relationship types vary based on the selected installed link type:

- For the *Brings and Removes* link type, values are:
  - *Brings and Removes*

    When installed product X *brings and removes* installed product Y, it means that Y is an installed product of a commercial component that was added automatically to the order when the commercial component represented by X was selected. The removal of X in a service management order results in the automatic removal of Y.
  - *Is Removed By*

    When installed product X *is removed by* installed product Y, it means that X is an installed product of a commercial component that was added automatically to the order when the commercial component represented by Y was selected. The removal of Y in a service management order results in the automatic removal of X.
- For the *Sells* link type, values are:
  - *Sells*

    When installed product X *sells* installed product Y, it means that X is an installed product of a commercial offer that sells the functional component that is represented by Y.
  - *Is Sold By*

    When installed product X *is sold by* installed product Y, it means that X is the installed product of a functional component that is available for sale to customers through a commercial offer that is represented by Y.
- For the *Relies On* link type, values are:
  - *Applies On*

    When installed product X *applies on* installed product Y, it means that Y represents a functional component that is a prerequisite for X.

    When installed product X *applies on* installed product Y, it means that X is the group offer that offers shared resources with Y, a member of the group offer using shared resources.
  - *Is Used By*

    When installed product X *is used by* installed product Y, it means that Y represents a functional component that is dependent on the functional component of X.

- For the *Child Of* link type, values are:
  - *Is Child Of*

    When installed product X *is child of* installed product Y, it means that X is the immediate child (a commercial component) of Y in a multilevel product bundle.
  - *Is Parent Of*

    When installed product X *is parent of* installed product Y, it means that X is the immediate parent (a commercial component) of Y in a multilevel product bundle.

Installed Product Displays a link to the installed product page for a specific offer.

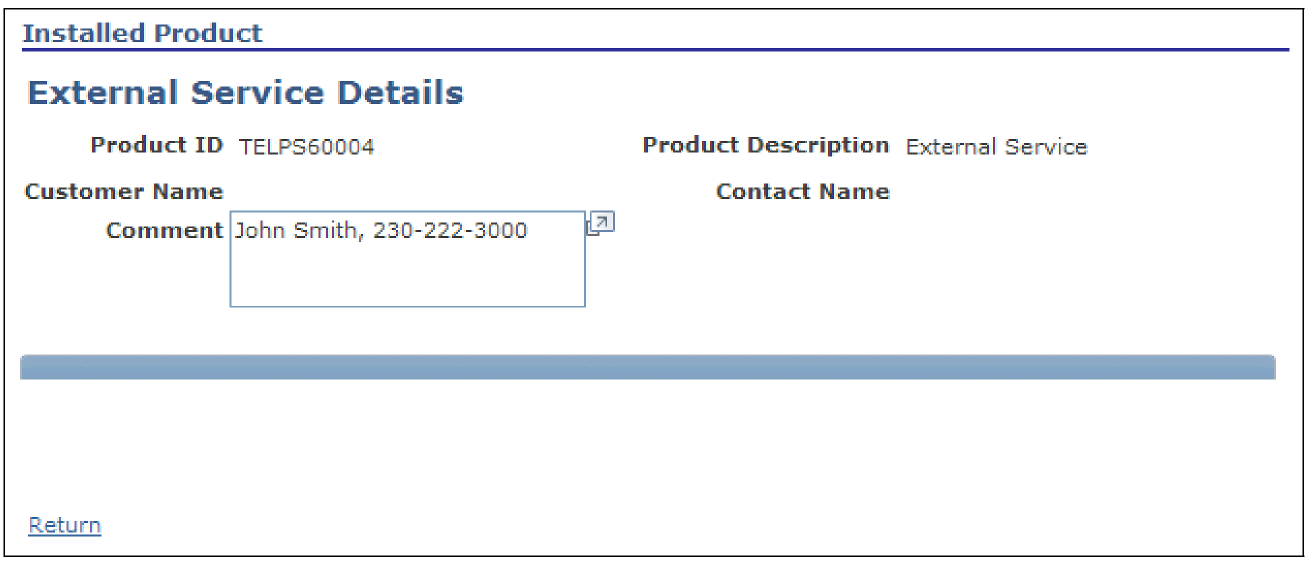
If the installed product is an external service, the link directs you to the External Service Details page.

Product Description Displays the installed product description.

Date Installed and **Date Disconnected** Displays the dates when the installed link becomes active and disconnected.

Viewing External Service Details

Access the External Service Details page (click the Installed Product link on the Installed Product page).



External Service Details page

The External Service Details page displays information about the external service associated with a group offer member.

Viewing Installed Product Hierarchies

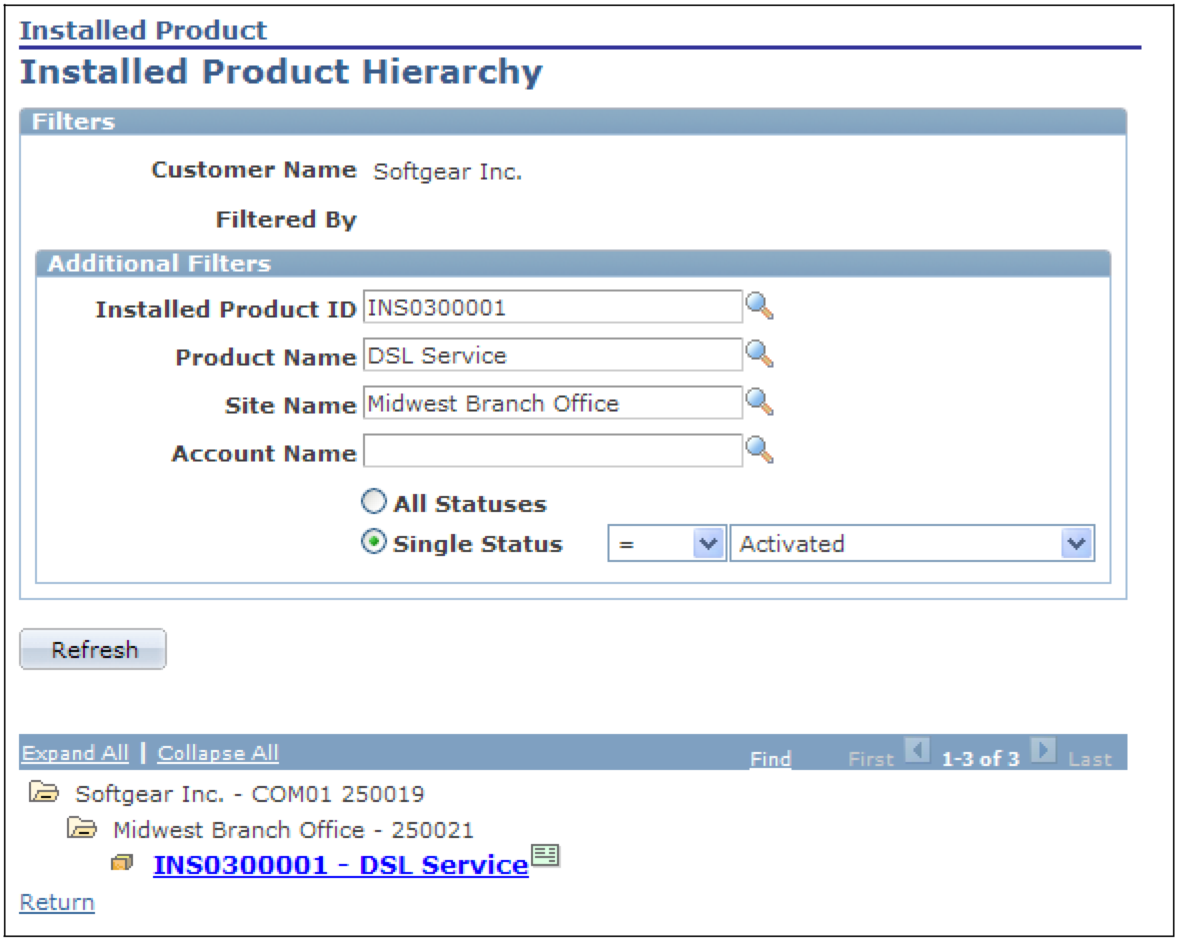
This section discusses how to view the installed product hierarchy.

Page Used to View the Installed Product Hierarchy

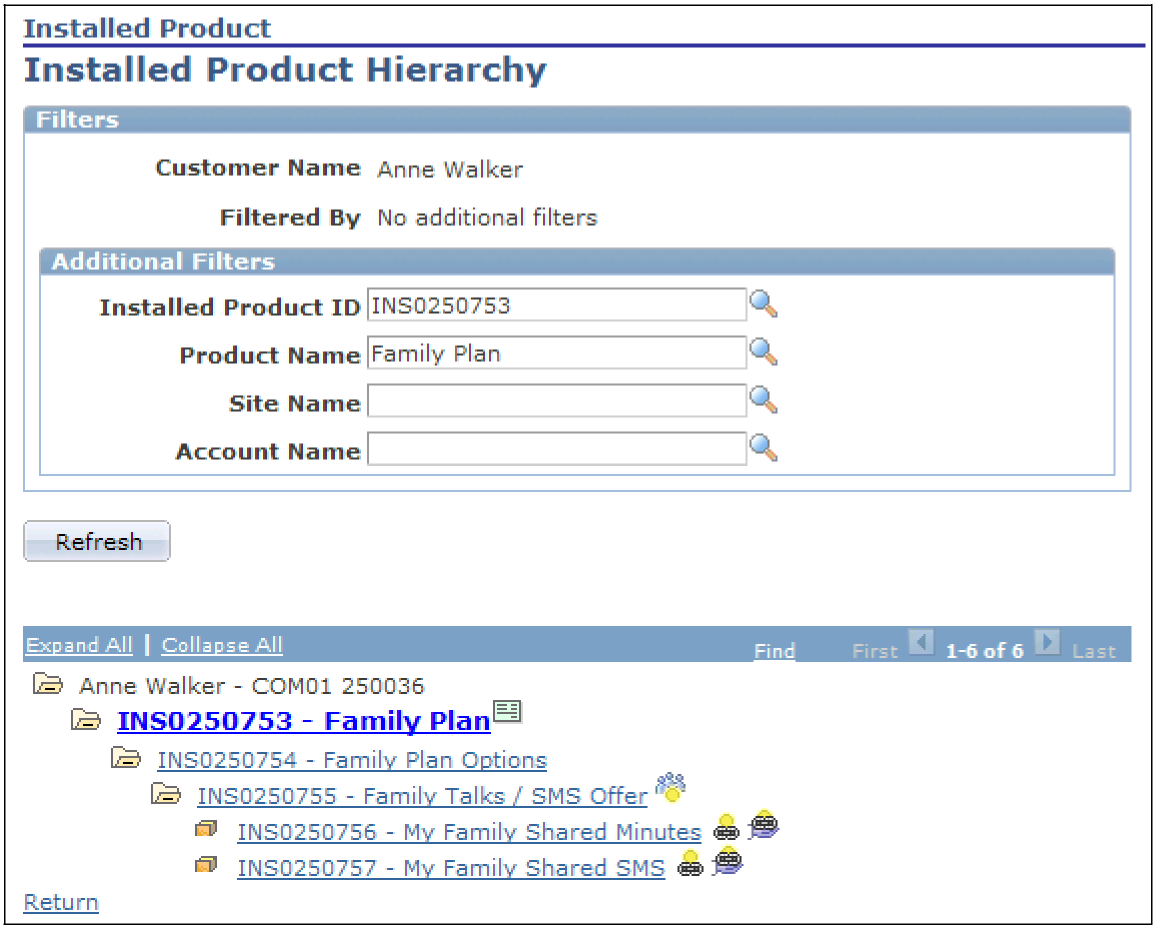
Page Name	***Definition Name***	***Navigation***	***Usage***
Installed Product Hierarchy	RF_INSTPROD_VH_SEC	Click the View Hierarchy button from the Installed Product, Service Order, My Service Order, Support Case, HelpDesk Case, RMA (return material authorization), Site (under Customers CRM), Product Registration Installed Assets, Search Installed Products and Services, Search Installed Assets, Customer 360 Degree View, Worker 360 Degree View, Order Capture Entry, Self-Service Accounts, Self-Service View Services, Self-Service Support Case, and Self-Service HelpDesk Case pages.	View the installed products that meet the customer or internal worker, site, product, serial number, asset tag, and department criteria that is available on the source page. For the installed products that the system returns, you can also view record status and parent, child, and sibling relationships to other installed products.

Viewing the Installed Product Hierarchy

Access the Installed Product Hierarchy page (click the View Hierarchy button from the Installed Product, Service Order, My Service Order, Support Case, HelpDesk Case, RMA (return material authorization), Site (under Customers CRM), Product Registration Installed Assets, Search Installed Products and Services, Search Installed Assets, Customer 360 Degree View, Worker 360 Degree View, Order Capture Entry, Self-Service Accounts, Self-Service View Services, Self-Service Support Case, and Self-Service HelpDesk Case pages).



Installed Product Hierarchy page



Installed Product Hierarchy showing multilevel installed product

The initial display of the installed product hierarchy presents the parent-child relationships of all installed products that belong to a customer identified from the calling component. The hierarchy has a filtering capability that allows you to further refine the display based on installed product ID, product name and site name.

The tree structure shows the Installed Product ID (always), Description (always), Site,Department, and Account fields for each installed product that meets the filter criteria. It only displays these fields (Site, Department, and Account) if they are configured to display when you define the tree setup and department. In addition, these filters are available only if you have PeopleSoft HelpDesk installed. Click the link of an installed product to access the Installed Product page, where you can update information as necessary.

When the tree information requires more space than fits on the page, use the positional links (First, Previous, Next, Last, Left, and Right) at the top of the tree to navigate through the information. Click the folders that appear in the tree to collapse or expand specific sections of the hierarchy.

Note. This hierarchy is not available for service orders or cases if they are configured to hide installed product information (through the corresponding service order or call center configuration templates). You can turn on additional runtime filters using the Tree Configuration: Department (if PeopleSoft HelpDesk is installed) and Account.

Filters

Displays the values that are available on the source page that the system used to filter the initial view of the hierarchy.

All Statuses and **Single Status**

Select the status of the installed products that should be included in the hierarchical view.

These status fields are not available to multilevel installed products.

Note. If you select Single Status, you can also use either the equal to (=) or not equal to (not =) operator to select a status for which you want to search for a product.

Refresh

Click to update the display after specifying alternate status values.

<installed product number and description>

Click the link to access the corresponding installed product record.

 (create change order in service management)

Click to create a service management order for the corresponding multilevel installed product.

If you click this link for an installed product that is part of a multilevel installed product, the system creates a service management order for the first level (the highest) component of the multilevel installed product, regardless of the level within the bundle from which the request was triggered.

Installed Product Hierarchy for Multilevel Installed Products

The hierarchy viewer supports the display of parent-child relationships in multilevel installed products. When you access the viewer from an installed product of a multilevel installed product, all installed products that are included, except the lowest-level components, appear in an expanded mode for a complete view of the structure. The installed product from which the viewer is accessed is shown in bold. An icon appears next to the top-level installed product; clicking the icon creates a service management order for the top-level installed product, hence the entire multilevel installed product.

Components of a multilevel installed product do not appear if they are functional components or if they are set to be hidden from the installed product hierarchy in their product definitions. If a multilevel installed product component is set not to appear, any of its children are hidden from the hierarchy as well.

Note. The installed product hierarchy is accessible from both Customer and Worker 360-Degree Views. The display of multilevel installed product is supported for the Customer 360-Degree View.

Whenever applicable, the installed product hierarchy displays visual cues that indicate additional details are available for installed products. Clicking the icons transfers you to the corresponding installed product in a new browser window where the additional information can be viewed. For example, if you click the Relate functional component exists icon, the system transfers you to the installed product of the corresponding functional component.

Refer to the see reference for descriptions of these visual cues that are also used on the <capture type> - Entry Form page to show relationships of products between order lines. When used in the context of installed products, clicking any of these icons transfers you to an installed product as the destination.

See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working with Orders for Multilevel Product Bundles," Links.

Mapping and Reconciling Asset Information

This section lists a prerequisite, provides an overview of terms and definitions used in this PeopleBook, and discusses how to:

- Assign new product IDs to new asset entries.
- Reconcile asset information.

Note. The Product Mapping for Hardware Assets and Asset Reconciliation pages are only relevant for users who are implementing asset integration with FMS.

Prerequisites

Before you can access your third-party asset management application from within PeopleSoft HelpDesk, you must first:

- Install a third-party asset management application.
- Install the third-party software on the computers that need to be discovered.
- Install the third-party remote control software on the computers that need to be remotely controlled.
- Update the Portal CREF information to point to the correct URL for your environment.

  See *PeopleTools 8.52: PeopleTools Portal Technologies PeopleBook*

Note. Refer to the vendor's documentation or ask your consultant for advice on setting up an integration with PeopleSoft CRM. Refer to the Oracle corporate website (under the Partners section) for a list of oracle-validated integrations and independent software vendors (ISVs).

See Also

http://www.oracle.com

Terms and Definitions

This section discusses common terms used in this document.

Terms

These terms are used throughout this document:

Asset	Any technology device, such as a computer, peripheral, or router.

Remote Control	The ability to remotely take control of a computer system.
ITAM	Information Technology Asset Management.

Enabling Integration to the Asset Repository Module in PeopleSoft Financials

The option for enabling asset integration between PeopleSoft CRM and Financials is available as a general option in display templates that are created for installed assets. As delivered, this option is disabled in the display template delivered for installed assets.

To enable asset integration:

1. Navigate to Set Up CRM, Common Definitions, Component Configuration, Display Templates, Display Template Details. Open a display template for installed assets.

   If you want to enable the integration in the delivered display template for installed assets, look it up by the name *CORE_IP_ASSET*, which is created using the RC_HELPDESK display template family code and the RF_INST_PRODUCT component.

2. On the Display Template page that appears, click the Installed Product page link. After the page refreshes, click the Show Section Details link at the bottom of the page to expand the section.

   This step ensures that all the asset-related fields that will appear as a result of the integration are already enabled for display before the integration is enabled.

3. Scroll to the PRODUCT section, and make sure that these fields are enabled for display: Asset Type, Validated,Asset Subtype, and Transfer. Save the change.

4. Scroll to the beginning of the page. Click the Return link. Click OK to the system message about saving the display template.

5. On the Display Template page, locate a general option called *Asset Integration.* Change its value to *Yes*, and save the change.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates," Enabling Pages and General Options.

See *PeopleTools 8.52: PeopleSoft Integration Broker PeopleBook*

Running the Initial Data Synchronization

To synchronize all desired asset data between Financials and CRM on a newly implemented system:

1. Use PeopleTools Integration Broker to activate the location, department, and worker messages.

2. In the Financials application, navigate to Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish.

3. Publish using these messages in this order:

   - Manufacturer data: MANUFACTURER_FULLSYNC

   - Asset Subtype data: COPY_AM_SUBTYPE

   - Asset Full Sync data: COPY_IT_ASSET

4. Inactivate the FULLSYNC messages and activate the corresponding SYNC messages.

Processing the messages in the order given creates records for these data, in this order:

1. Employee, department, and location data.

2. Manufacturer data and asset subtype data.

3. Financials asset repository data.

Records created in this order ensure that the data is validated.

Synchronizing data in this order ensures that the relevant data referred to in the Financials assets, such as department, employee, and manufacturer, has corresponding entries on the CRM side. Without such corresponding data on the CRM side, the full synchronization might attempt to create a CRM-installed asset for an employee who does not exist in CRM, which would cause an error.

See *PeopleSoft Maintenance Management 9.1 PeopleBook*

See *PeopleSoft 9.1 PeopleBook: Application Integration Framework*

See *PeopleSoft 9.1 PeopleBook: Integration Interfaces*

See *PeopleTools 8.52: PeopleSoft Integration Broker PeopleBook*

See and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Managing Enterprise Integration for PeopleSoft CRM," Data Integrations.

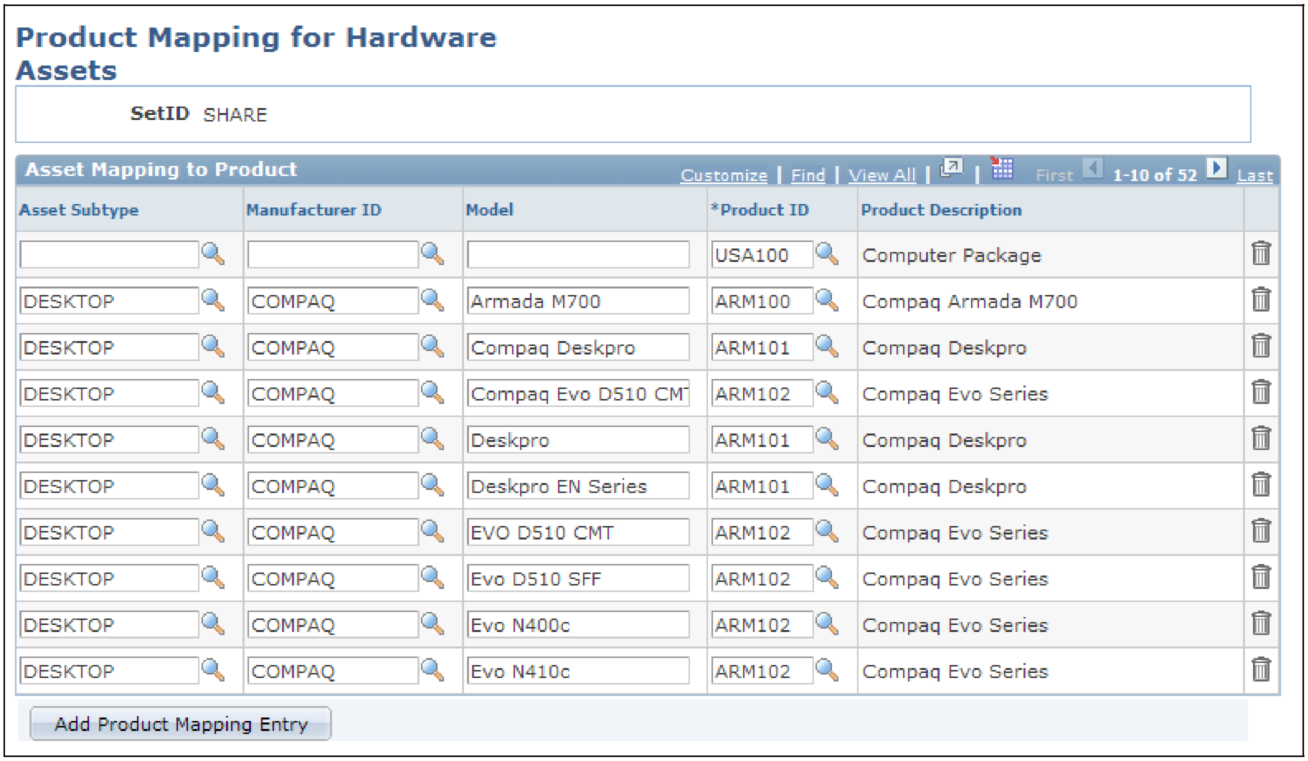
See and *PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Integrating with PeopleSoft Applications," Integrating with PeopleSoft Financial Management Services.

Pages Used to Map and Reconcile Asset Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Product Mapping for Hardware Assets	RF_PROD_MAP	Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Asset Product Mapping, Product Mapping for Hardware Assets	Associate a match for non-null fields to create a new installed asset on the CRM side.
Asset Reconciliation	RF_ASSET_RECON	HelpDesk, Asset Reconciliation, Asset Reconciliation	Display all possible matching CRM entries and provide action buttons to either merge or create new CRM assets.

Assigning New Product IDs to New Asset Entries

Access the Product Mapping for Hardware Assets page (Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Asset Product Mapping, Product Mapping for Hardware Assets).



Product Mapping for Hardware Assets page

Use this page to map a combination of the three FMS fields (Asset Subtype, Manufacturer, and Model) to a CRM product ID value as part of the asset integration between the two systems.

On all installed product entries, CRM requires a product ID, but FMS does not associate a product ID to its asset entries. The map you create should specify how the CRM system should assign a product ID to each CRM-installed asset entry that is created from FMS asset data.

The Asset Subtype, Manufacturer, and Model fields on this page refer to the identically defined fields from PeopleSoft FMS Asset Management.

Note. To capture product asset information from FMS that does not map to the installed product entries in CRM, leave the Asset Subtype, Manufacturer, and Model fields blank in the first row on this page and only enter a Product ID. When no matches are found on asset data in CRM, the system provides the information from FMS to this product ID by default.

Reconciling Asset Information

Access the Asset Reconciliation page (HelpDesk, Asset Reconciliation, Asset Reconciliation).

Select the option associated with the asset that best matches the data that has come over from your FMS database. This information appears in the top portion of the page. Then, click one of the buttons at the bottom of the page to either merge the selected asset or create a new asset.

Merge Selected Installed Asset	Click this button if the FMS data matches the asset data on the CRM side and you want to create a CRM-installed asset row based on the values from the selected FMS row.

Create New Installed Asset	Click this button if the FMS data does not refer to any asset on the CRM side and you want to create a CRM-installed asset row based on the values from the selected FMS row.

Appendix A

Product Delivered Web Services

This appendix discusses the delivered Installed Product and Product Service web services, and provides guidelines on how to view message elements.

Delivered Web Services

This section discusses:

- The Installed Product web service.
- The Product Service web service.

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Business Processes and Web Services"

Installed Product Web Service

PeopleSoft CRM delivers these service operations for the Installed Product web service:

- Create Installed Product

  This operation creates an installed product using the existing component interface (CI) in the CRM system. The component provides normal defaulting and processing. The return message indicates success or failure and includes the installed product ID and setID.

- Get Installed Product

  This operation requires a setID and installed product ID. The CI is used so that all security is enforced.

- Search Installed Product

  Similar to the agent-facing installed product search, you can send various types of data in your request. This operation returns a list of installed products that meet all the given criteria.

- Update Installed Product

  This operation updates an installed product using the existing CI in the CRM system. The component provides normal defaulting and processing. The return message indicates success or failure and includes the installed product ID and setID.

These usage rules apply to the Update Installed Product service operation:

- If no update is intended for any row in a child rowset (status, warranty, or attribute), you may omit all the rows for that child rowset and the existing child rows will be retained.

  For example, if there are five status rows and you send zero status rows in the update, the existing five status rows are retained without change. However, if there is an update needed for any single row in the status rowset or warranty rowset, you must provide all rows in that rowset, regardless of whether they all have an update or not. If there are five status rows and you want to change one, add one, and delete one, send the full set of final rows (the one that has the changed value, the three that remain unchanged, and the one new one).

- The attribute rowset is included to allow you to set and change values of attributes for existing installed products.
- No attributes can be deleted.
- Because we do not allow deletes for the attribute rowset, it is sufficient to send only the changed entries or the new entries if there is an update or add required for the attribute rowset.

  For example, if there are five attribute rows and one needs an update, you only need to send the row that has the update. The four other existing rows are retained and untouched.

This table provides the technical names, operation type, and message names of the service operations that are related to the Installed Product web service:

Service Operation	***Operation Type***	***Request Message***	***Response Message***
Create Installed Product (RF_INST_PROD_CREATE)	Synchronous	RF_INST_PROD_CREATE_REQ	RF_INST_PROD_CREATE_RES
Get Installed Product (RF_INST_PROD_GET)	Synchronous	RF_INST_PROD_GET_REQ	RF_INST_PROD_GET_RES
Search Installed Product (RF_INST_PROD_SEARCH)	Synchronous	RF_INST_PROD_SEARCH_REQ	RF_INST_PROD_SEARCH_RES
Update Installed Product (RF_INST_PROD_UPDATE)	Synchronous	RF_INST_PROD_UPDATE_REQ	RF_INST_PROD_UPDATE_RES

Product Service Web Service

PeopleSoft delivers these service operations for the Product Service (CO_PRODUCT) web service:

- Get Product Details

  This operation takes a product ID and returns information about the matching product.

- Get Terms And Conditions Synchronization Search

  This operation takes a product ID and returns information about the terms and conditions that apply to the matching product.

- Get Catalog

  This operation takes a catalog ID and returns information about the matching catalog.

- Search Financial Product

  This operation takes search parameters (product ID, setID, product description, product package, arrangement, and coverage) that are entered for products and returns a list of matching financial products.

- Search Product

  This operation takes search parameters (product ID, setID, description, product type, and effective status) that are entered for products and returns a list of matching products.

This table provides the technical names, operation type, and messages names of the service operations that are related to the Product Service web service:

Service Operation	***Operation Type***	***Request Message***	***Response Message***
GetProductDetails (CO_PROD_ITEM_SYNC_SEARCH)	Synchronous	CO_PROD_ITEM_REQ	CO_PROD_ITEM_RSP
Get Terms And Cond Sync Search (CO_PROD_TERMS_COND_SYNC_SEARCH)	Synchronous	CO_PRD_TERMS_COND_REQ	CO_PRD_TERMS_COND_RSP
GetCatalog (CO_PRODUCT_CATALOG_SYNC_SEARCH)	Synchronous	CO_PRD_CATALOG_REQ	CO_PRD_CATALOG_RSP
SearchFinancialProduct (CO_PRODUCT_FSI_SEARCH)	Synchronous	CO_PROD_FSI_SRCH_REQ	CO_PROD_FSI_SRCH_RSP
Search (CO_PRODUCT_SEARCH)	Synchronous	CO_PRODUCT_SEARCH_REQ	CO_PRODUCT_SEARCH_RSP

Viewing Message Elements

You can view the elements and fields that are included in each operation message 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 the name of the message you want to view in the Message Name field and click Search.

3. The Message Definition page appears. Click the message name link under the Parts grid.

   The system opens the Message Definition page in a new browser. This step is required only if you selected a *container* message. If you selected a *parts* message in step 2 above, proceed directly to step 4.

   Note. The system utilizes both *container* messages and *parts* messages. A *container* message may contain one or more parts. The *parts* message has the actual list of data fields.

   ---

4. 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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