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PeopleSoft CRM 9.1 Business Object Management PeopleBook

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PeopleSoft CRM 9.1 Business Object Management PeopleBook
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Oracle's PeopleSoft CRM Business Object Management Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleSoft product and item 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

PeopleSoft Product and Item Management

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

See Also

PeopleSoft CRM 9.1 Product and Item Management PeopleBook

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 Application Fundamentals PeopleBook.

There are four parts to the *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook:*

- 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 (OAF), business projects, and scripts.

- Configuration Tools.

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

- Knowledge Management.

  This part discusses the setup of Verity search.

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook

PeopleSoft Services Foundation

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

There are four parts to the *PeopleSoft CRM 9.1 Services Foundation PeopleBook:*

- Entitlement Management.

  Entitlement management enables users to manage agreements and warranties.

- Solution Management.

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

- Time Management.

  Time management enables users to log time for the work performed on service order lines and cases.

- Environmental Systems Research Institute (ESRI) integration.

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

See Also

PeopleSoft CRM 9.1 Services Foundation PeopleBook

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 CRM Business Object Management

Chapter 1

Getting Started with CRM Business Object Management

This chapter provides an overview of business object management in PeopleSoft Customer Relationship Management (CRM) and discusses:

- CRM cross-product business processes.
- CRM cross-product integrations.
- CRM cross-product implementation.

CRM Business Object Management Overview

CRM represents customers (companies, sites, consumers), contacts of customers, and workers as business objects in the customer data model. Business objects can have different roles attached to them. Depending on the role that a business object plays, it can require different types of data and can participate in different relationships with other business object-role combinations.

CRM provides:

- Setup tables that define possible business object roles and relationships.
- Components that enable you to manage data, roles, and relationships for customers in the BORM.
- Business object searches that enable you to locate an existing business object to use in transactions.
- The capability to quickly create a business object immediately by entering essential information.

CRM Business Object Integrations

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

- Integration with PeopleSoft Human Capital Management or other similar systems enables you to synchronize CRM employee records with the system of record for human resources (HR) data.
- Integration with PeopleSoft Supply Chain Management (SCM) or other similar systems enables you to synchronize customer data that is required for applications within CRM such as Sales, Field Service, and Order Capture.

- Integration with SCM and Financial Management Solutions enables billing information and payment information that is associated with customers to appear in the PeopleSoft CRM 360-Degree View.
- The Credit Card EIP (enterprise integration point) enables you to integrate with third-party credit card authorization and payment vendors in Support and the collaborative selling applications.

Refer to the implementation chapters in this PeopleBook for detailed information. You can find supplemental information about third-party application integrations on the My Oracle Support website.

CRM Business Object Implementation

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

- A list of components that you must set up.

  This list is the order in which you must set up the components and enter data into them.
- Links to the corresponding PeopleBook documentation.

CRM also provides component interfaces (CIs) to help you load data from an existing system into CRM tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Getting Started with PeopleSoft Customer Relationship Management 9.1 Applications."

Other Sources of Information

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

See Also

PeopleTools 8.52: PeopleSoft Component Interfaces PeopleBook

PeopleTools 8.52: PeopleSoft Setup Manager PeopleBook

Part 2

Business Object Management Basics

Chapter 2

Understanding Business Object Relationship Model Components

This chapter discusses:

- BORM (business object relationship modeling) architecture.
- Address books for business objects.
- Business object searches.
- Basic data tables.
- Business object profiles.

Business Object Relationship Modelling

This section discusses:

- BORM architecture.
- Business object components.
- Roles.
- Relationships.
- Customers and business contacts.

BORM Architecture

The business object relationship model (BORM) provides a flexible architecture for establishing and maintaining the relationships that form the foundation of the business model. You can support business-to-business and business-to-consumer models within a single implementation of the BORM.

A business object is any entity for which you store data and that participates in one or more business relationships. The primary key on the business object record, the BO_ID, acts as a pointer to the entity records. This design enables you to create and maintain relationships between different entities without regard to their various key structures.

Business objects participate in relationships with other business objects according to their assigned roles. Business object types categorize business objects and enable you to define roles for each type. The business object record also provides a common field (BO_NAME) for naming different entities that participate in relationships. For a relationship to be meaningful to users, you should associate a name with each relationship participant.

You can add organization-specific entities to the system and manage relationships for these new entities in the core PeopleSoft Customer Relationship Management (PeopleSoft CRM) applications with little or no application customization.

Business Object Components

PeopleSoft Customer Relationship Management (CRM) delivers a set of transactions, or components, for creating business objects:

- Company
- Partner Company
- Site
- Person
- Worker

Every business object that you create in a system component has a type of either Organization or Individual. The Organization business objects are either companies, partners, or sites; and the Individual business objects are persons. The Person business object can represent any or all of the following: a consumer, a contact, or a worker, depending on the role that is associated with it.

Note. You can create a worker directly within the Worker component or by adding the Worker role to a Person business object.

See Also

Chapter 9, "Defining Company Business Objects," page 137

Chapter 11, "Defining Person Business Objects," page 167

Chapter 10, "Defining Site Business Objects," page 155

Chapter 16, "Defining Ad Hoc Business Objects," page 339

Chapter 12, "Defining Workers," page 191

Roles

You must associate a business object with a role before it can participate in a relationship. In the business object relationship model, the roles that a business object can play are tracked in the Business Object Role table (BO_ROLE). Delivered roles are associated with company, partner, consumer, site, contact, and worker business objects. You can define additional roles.

In most cases, the way that you create the business object determines its role. For example, when you create a business object in the Company component, the Company role is automatically assigned to it.

See Also

Chapter 3, "Defining Control Values for Business Objects," Defining Role Types and Role Categories, page 26

Chapter 8, "Working with the Relationship Viewer," page 121

Relationships

Business object relationship records (BO_REL) capture a connection between two business objects, each playing a specific role. You create relationships to track and view information about customers. For example, relationships can show the corporate structure of a company and the contacts that you work with at each of the corporate sites.

To establish a relationship between two business objects, you first define relationship type records (BO_REL_TYPE), which define the rules of the relationship, including the role that a business object must have to participate in the relationship, and the number of business objects that can participate in a specific relationship role.

Company, partner, site, person, and worker business objects participate in the delivered relationship types. You can define additional relationship types to support business needs.

See Also

Chapter 3, "Defining Control Values for Business Objects," Defining Relationship Types and Relationship Categories, page 30

Chapter 8, "Working with the Relationship Viewer," page 121

Customers and Business Contacts

In the BORM, customers are the company, site, and consumer business objects. When you define any customer to the system, a record is created in the Business Contact (BC) table. This record enables you to define sold to, ship to, or bill to options for customer business objects. You can manage contact information based on the purchasing options—sell to, ship to, or bill to options—that are assigned to the business object.

See and Chapter 5, "Defining Purchasing Options for Companies, Consumers, and Sites," page 77.

Key Performance Indicators

A key performance indicator represents a customer's overall performance on some criterion, which is usually revenue-generated. Key performance indicators are useful to establish and keep successful relationships with customers—for example, to determine which customers are eligible for special values or promotions.

PeopleSoft Enterprise Performance Management uses customer information that you define as performance criteria to calculate and determine one single key performance indicator. You can represent a key performance indicator value as anything that is meaningful to business users— for example, a category such as gold, silver, or bronze or a calculated number value.

When the key performance indicator value is available in Performance Management, CRM can access it by using integration. When available, this information is displayed in the Assessment field on the component details page.

See Also

Chapter 2, "Understanding Business Object Relationship Model Components," page 7

Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Contacts, page 67

Chapter 10, "Defining Site Business Objects," page 155

Chapter 4, "Defining Name and Address Information for Business Objects," page 51

Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Contacts, page 67

Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," Mapping Message Data to PeopleSoft CRM Records and Fields, page 375

Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," Understanding Enterprise Integration Technology, page 343

PeopleSoft 9.1 PeopleBook: Enterprise Components

PeopleSoft EPM 9.1 Scorecard PeopleBook

Contact Information for Business Objects

Address Book entries are logical groupings to the primary contact methods, or communication channels, for a business object. A contact info entry is similar to a rolodex card and can contain a postal address, one or more email addresses, and up to four phone, fax, or pager numbers. Each business object can have one or more contact info entries set up for different purposes or locations. For example, a consumer might have an contact info entry for both home and work.

When you implement the Customer Relationship Management system, you designate how many contact info entries are available for each organization and individual business object type. At run time, users of the system can select which entry is the primary contact information for the business object and can update the contact methods that is associated with each entry. The primary information appears on component pages.

See Also

Chapter 4, "Defining Name and Address Information for Business Objects," page 51

Chapter 10, "Defining Site Business Objects," page 155

Chapter 11, "Defining Person Business Objects," page 167

Business Object Searches

Business object searches:

- Enable Customer Relationship Management users to locate specific business objects for display or update.
- Are called from system prompts and the Business Object Search component.
- Return a set of selected business objects that meet the search criteria.

Delivered system data includes a set of search definitions that support functionality in the PeopleSoft core applications. You can modify these search definitions or create additional definitions.

See Also

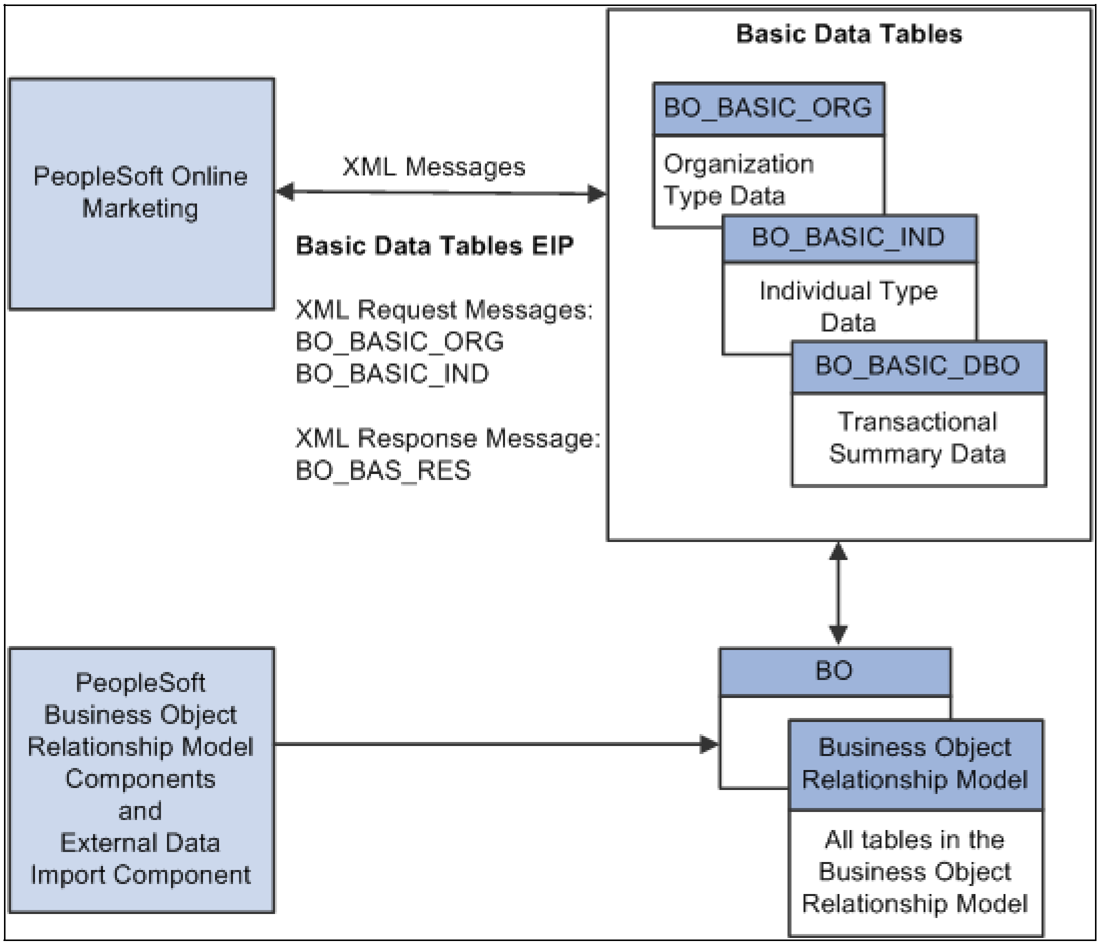
Chapter 13, "Working with Predefined Business Object Search and Quick Create Data," page 223

Basic Data Tables

The basic data tables contain a subset of information from the BORM tables. These tables assist with integration between the different CRM products. Currently, PeopleSoft Online Marketing and the external import functionality use these tables. The basic data tables give these other PeopleSoft products an efficient and quick way to obtain the information that they need for their business requirements.

During installation, the basic data tables are automatically synchronized with the information that is in the BORM. After that, the system keeps the BORM tables and the basic data tables in sync.

This diagram illustrates the relationship between CRM basic data tables and the BORM:



Basic Data Tables

When you create a business object and save it in the BORM, a subset of this information is passed to the basic data tables. If the Customer Data Hub and Data Quality Management products are installed and a customer is inactivated in the BORM as the result of a merge, the record for the inactivated customer is removed from the basic data tables.

PeopleSoft Online Marketing retrieves information directly from the basic data tables and updates information on the basic data tables by using XML messages. This information is also passed to the BORM tables, which keeps the BORM tables and the basic data tables in sync.

The external data import process also updates the basic data tables if audience information is attached to the import template.

See Also

Chapter 18, "Importing Data into PeopleSoft CRM," page 381

PeopleSoft Online Marketing 9.1 PeopleBook

Business Object Profiles

Profile fields provide a configurable way for marketers to define and collect customer information, such as color preference, brand preference, or shipping preference, through online marketing. Profile data is defined and stored separately from the BORM but is related to a business object by its BO_ID key.

Customer Relationship Management components enable you to view and update business object profiles for a business object. You can also use profile fields as business object search criteria.

See Also

Chapter 7, "Working with Business Object Profiles," page 91

Chapter 3

Defining Control Values for Business Objects

This chapter provides an overview of business object controls and discusses how to:

- Define business object and name types.
- Define role types and role categories.
- Define relationship types and relationship categories.
- Configure address books.
- Set up contact methods.
- Define component transfer navigation.
- Define segment codes.
- Define industries.
- Define national ID types.
- Define customer groups.
- Define customer data management system options.
- Define basic data mappings.

Understanding Business Object Controls

Business object control values are options that users can select when defining business objects. For many of these controls, the PeopleSoft Customer Relationship Management (PeopleSoft CRM) system provides system data to support specific processing.

This section discusses:

- Business object types.
- Role types and role categories.
- Relationship types and relationship categories.
- Contact information entries.

- Contact method types and contact method purpose types.
- Component transfer navigation.

Business Object Types

The term *business object* refers to any entity that can participate in business relationships. Business objects participate in relationships with other business objects according to their assigned roles. Business object types categorize business objects and enable you to define roles for each type.

The PeopleSoft system delivers these predefined business object types:

- Individual

  Represents a single individual, such as a contact or a consumer.
- Organization

  Represents a group of individuals, such as a company.
- Database Object

  Represents an object in the system, such as a financial account.

See and Chapter 3, "Defining Control Values for Business Objects," Modifying and Adding Business Object Types, page 25.

Role Types and Role Categories

Business objects participate in relationships according to their assigned roles, or role types. Each business object type has a set of role types to which it is associated.

Individual Role Types

PeopleSoft CRM delivers these role types for individual business objects:

- Person

  This role indicates a person with an undefined role. This role is automatically assigned when you create consumers, contacts, and workers by using the Person component.
- Worker

  This role indicates a person who performs work for your company, either as an employee or as a contractor. This role is automatically assigned when you define a worker by using the Worker component.
- Broker

  This role indicates a person who acts on behalf of multiple customers. You manually assign this role to a contact business object by using the Role page of the ad hoc Business Object component.

- Contact

  This role indicates a person who acts on behalf of a customer or a partner company. This role is automatically assigned when you designate that a person is a contact of a customer or a partner company.

- Individual Consumer

  This role indicates a person who purchases, leases, or contracts for your products or services. This role is automatically assigned when you define a consumer by using the Person (Individual Consumer) component.

- Account Contact

  This role indicates a person who participates as a member of an account team that is assigned to manage a corporate account. This role is automatically assigned when you define a worker as a member of an account team on the Accounts page of the Company, Site, or Person (Individual Consumer) components.

- Internal Contact

  This role is used for converting earlier versions of PeopleSoft CRM. Previously, PeopleSoft CRM used contact types; these are now role types.

- External Contact

  This role is used for converting earlier versions of PeopleSoft CRM. Previously, PeopleSoft CRM used contact types; these are now role types.

- Business Contact (IND)

  This role indicates that the individual is a customer.

- Ship To Individual

  This role indicates that the individual is a customer who can receive shipments. This role is for order processing.

- Sold To Individual

  This role indicates that the individual is a customer who can make purchases. This role is for order processing.

- Bill To Individual

  This role indicates that the individual is a customer who can receive bills. This role is for order processing.

- Individual Prospect

  This role indicates an individual prospect. This role is for sales.

- Sales User

  This role type is assigned to sales users.

  See and *PeopleSoft Sales 9.1 PeopleBook*, "Setting Up Sales Security and Personalization," Setting Up Sales Users.

Organization Role Types

PeopleSoft CRM delivers these role types for organization business objects:

- Company

  This role indicates an organization that purchases, leases, or contracts for your products or services. The system automatically assigns this role when you define a customer by using the Company component.

- Site

  This role indicates a place where a product is shipped or installed, or where a service is performed. The system automatically assigns this role when you define a site by using the Company, Person (Individual Consumer), or Site component.

- Competitor

  This role indicates a company that competes for your company's customer base. You can manually assign this role to company business objects by using the Role page of the ad hoc Business Object component.

- Partner

  This role indicates a company that cooperates with your company in a joint venture.

- Primary Owner - Company

  This role indicates a company that is the primary owner. This role is used in PeopleSoft Sales.

- Corporate Hierarchy

  This role indicates an entity that makes up an organization structure, such as position, department, location, and division.

- Business Contact (ORG)

  This role indicates that the organization is a customer.

- Ship To Organization

  This role indicates that the customer can receive shipments.

- Sold To Organization

  This role indicates that the customer can make purchases.

- Bill To Organization

  This role indicates that the customer can receive bills.

- Organizational Prospect

  This role indicates that the individual is an organizational prospect.

Depending on which PeopleSoft CRM solutions you have implemented, you might see additional role types listed on the system setup pages for roles. Additionally, you can view the organization of role types into role categories that support processing that applies to a specific set of role types.

See Also

Chapter 3, "Defining Control Values for Business Objects," Defining Role Types and Role Categories, page 26

Relationship Types and Relationship Categories

Relationship types describe the relationship between two business objects. You must define a relationship type for each relationship in which a business object with a specific role can participate. The predefined business object relationship types are:

- Company ⇔ Site

  This type indicates a nonhierarchical relationship between the company and site role types and signals that a company includes a site. The system automatically establishes this relationship when you associate a site with a company by using the Company or Site component.

- Site ⇔ Site

  This type indicates a peer-to-peer relationship between two site role types and signals that the sites are associated with the same company. You create this relationship manually by using the Relationship page of the ad hoc Business Object component.

- Primary Contact ⇔ Company

  This type indicates a relationship between the contact and company role types and signals that the person with the contact role is the primary contact for the company. The system automatically establishes this relationship when you indicate the primary contact for a company by using the Company component.

- Contact ⇔ Company

  This type indicates a relationship between the contact and company role types and signals that the person with the contact role is a contact for the company. The system automatically establishes this relationship when you associate a contact with a company by using the Company or Site components or the Person component with the Contact role.

- Primary Contact ⇔ Site

  This type indicates a relationship between the contact and site role types and signals that the person with the contact role is the primary contact for the site. The system automatically establishes this relationship when you indicate the primary contact for a company by using the Site component.

- Contact ⇔ Site

  This type indicates a relationship between the contact and site role types and signals that the person with the contact role is a contact for the site. The system automatically establishes this relationship when you associate a contact with a site by using the Company or Site components or the Person component with the Contact role.

- Primary Contact ⇔ Consumer

  This type indicates a relationship between the contact and consumer role types and signals that person with the contact role is the primary contact for the consumer. The system automatically establishes the relationship when you indicate the primary contact for a consumer by using the Person component with the Consumer role.

- Contact ⇔ Consumer

  This type indicates a relationship between the contact and consumer role types and signals that the person with the contact role is a contact for the consumer. The system automatically establishes the relationship when you associate a contact with a consumer by using the Site component or the Person component with the Consumer or Contact role.

- Primary Contact ⇔ Person

  This type indicates a relationship between contact and person role types and signals that the person with the contact role is the primary contact for the person with the person role. You manually create this relationship using the Relationship page of the ad hoc Business Object component.

- Contact ⇔ Person

  This type indicates a relationship between the contact and person role types and signals that person with the contact role is a contact for the person with the person role. You manually create this relationship by using the Relationship page of the ad hoc Business Object component.

- Consumer ⇔ Site

  This type indicates a nonhierarchical relationship between the consumer and site role types and signals that a consumer is associated with a site. The system automatically establishes the relationship when you associate a site with a consumer by using the Site component or the Person (Individual Consumer) component.

- Parent Company ⇔ Company

  This type indicates a hierarchical relationship between two company role types and signals that one company is the parent of another company. The system automatically establishes the relationship when you define a parent company on the Company component.

- Primary Contact ⇔ Competitor

  This type indicates a relationship between the contact and competitor role types and signals that the person with the contact role is the primary contact for a competitor. You manually create this relationship using the Relationship page of the ad hoc Business Object component.

- Contact ⇔ Competitor

  This type indicates a relationship between the contact and competitor role types and signals that the person with the contact role is a contact for a competitor. You manually create this relationship using the Relationship page of the ad hoc Business Object component.

- Acct Owner ⇔ Company

  This type indicates a relationship between account contact and company role types and signals that the person with the account contact role is the owner of the company account. The system automatically establishes the relationship when you indicate the owner on the Account page of the Company component.

- Acct Team Member ⇔ Company

  This type indicates a relationship between the account contact and company role types and signals that the person with the account contact role is a member of the company account team. The system automatically establishes the relationship when you add an account member on the Account page of the Company component.

- Contact ⇔ Partner

  This type indicates a relationship between the contact and partner role types and signals that the person with the contact role is a contact for the partner. The system automatically establishes the relationship when you associate a contact with a partner.

- Primary Contact ⇔ Partner

  This type indicates a relationship between the contact and partner role types and signals that the person with the contact role is a primary contact for the partner. The system automatically establishes the relationship when you designate a contact as the primary contact for a partner.

Depending on which CRM solutions you have implemented, you might see additional relationship types listed on the system setup pages for roles. Additionally, you can view the organization of relationship types into relationship categories that support processing that applies to a specific set of relationship types.

See Also

Chapter 3, "Defining Control Values for Business Objects," Defining Relationship Types and Relationship Categories, page 30

Contact Information Entries

The address book for a customer, contact, or partner contains multiple contact information entries. Address book entries combine multiple contact methods for a business object into one entry for easy accessing and updating.

As delivered, the Individual business object type has three default contact information entries with the descriptions *Business*,*Home*, and *All Others.* The organization business object type has two default contact information entries with the descriptions *Business* and *Home.* Users can change the entry description when they enter contact information.

You can create different types of address books to reflect the different purposes for which you might contact a business object.

See Also

Chapter 2, "Understanding Business Object Relationship Model Components," Contact Information for Business Objects, page 10

Chapter 4, "Defining Name and Address Information for Business Objects," Accessing Contact Information, page 60

Contact Method Types and Contact Method Purpose Types

In PeopleSoft CRM, you can define multiple, effective-dated communication channels for company, site, consumer, contact, and worker business objects. For contact business objects, you can also define multiple communication channels for each of the roles that the contact plays in relationships with company, consumer, and site business objects.

Contact Method Types

A *contact method* is a specific communication channel. When you define a contact method for a business object or business object in a specific relationship role, you define the contact method *type* and purpose. The contact method type indicates the kind of communication channel, such as telephone or email.

PeopleSoft CRM provides these predefined contact method types:

- Address
- Phone
- Email

Contact Method Purpose Types

The *contact method purpose* indicates when the contact method is used. For example, a contact method purpose of *Main* might indicate the address to use for sending mail to a company's main offices. Similarly, a contact purpose type of *Home* might indicate the phone number to use when calling a consumer in the evening. You can define a set of contact method purpose types for each contact method in the system.

These predefined contact method purpose types are available for the address contact method type:

- Physical Location
- Business
- Campus
- Dormitory
- Home
- Legal
- Mailing

- Other

These contact method purpose types are available for the phone contact method type:

- Business
- Cellular
- Default
- FAX
- Home
- Telex
- Pager
- Campus
- Dormitory
- Main
- Other
- Home Fax
- Other Fax
- Assistant
- Callback
- Car
- SDN
- Radio
- TTY/TDD
- Company

These contact method purpose types are available for the email contact method type:

- Business
- Campus
- Dorm
- Home
- Other

See Also

Chapter 3, "Defining Control Values for Business Objects," Setting Up Contact Methods, page 35

Component Transfer Navigation

A *component navigation definition* defines a specific transaction page in the system that users can transfer to from the Relationship Viewer component or the Relationship page of the Company, Person (Individual Consumer), Person (Business Contact), and Site components. If the business object is editable, a transfer button appears next to each business object that appears in the relationship viewer. If the business object is read-only, a link to the business object appears. The location that you access is determined by a component navigation definition.

The CRM system delivers predefined component navigation definitions for these CDM components:

Note. The text in parentheses indicates the component navigation transaction ID.

Component Navigation Definition	***Description***
Account Representative (ACCTREP)	Enables transfers to the Accounts page of the Company component.
Business Contact (BC)	Not implemented for this release.
Business Object (BO)	Enables transfers to the Business Object page of the ad hoc Business Object component.
Company (COMPANY)	Enables transfers to the Company page of the Company component.
Individual Consumer (CONSUMER)	Enables transfers to the Consumer page of the Person (Individual Consumer) component.
Partner (PARTNER)	Enables transfers to the Consumer page of the Person (Individual Consumer) component.
Person (PERSON)	Enables transfers to the Contact page of the Person (Business Contact) component.
Site (SITE)	Enables transfers to the Site page of the Site component.
Worker (WORKER)	Enables transfers to the Worker page of the Worker component.

Warning! Do not change component navigation definitions that are delivered for CDM components; any modification to the default settings can cause the application to behave improperly.

Defining Business Object and Name Types

To define business object and name types, use the Business Object Type (BO_TYPE) and Business Object Name Type (BO_NAME_TYPE) components.

This section discusses how to:

- Modify and add business object types.
- Define name types for business objects.

Pages Used to Define Business Object and Name Types

Page Name	***Definition Name***	***Navigation***	***Usage***
Business Object Type	BO_TYPE	Set Up CRM, Common Definitions, Customer, Business Object Type, Business Object Type	Modify and add business object types.
Business Object Name Type	BO_NAME_TYPE	Set Up CRM, Common Definitions, Customer, Business Object Name Type, Business Object Name Type	Define name types for the selected business object type. When you define names for a business object, you must specify a type for each name.

Modifying and Adding Business Object Types

Access the Business Object Type page (Set Up CRM, Common Definitions, Customer, Business Object Type, Business Object Type).

When you open a business object type record that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the Modify System Data button.

Important! Oracle does not support changes to the system data that is delivered with PeopleSoft CRM.

Business Object Type ID Displays the identification code that is associated with the business object type. When you add a new business object type, the system automatically assigns a value by using automatic numbering functionality.

Note. You should seldom need to add additional business object types. Most entities that participate in relationships are adequately categorized by the delivered types.

Defining Name Types for Business Objects

Access the Business Object Name Type page (Set Up CRM, Common Definitions, Customer, Business Object Name Type, Business Object Name Type).

In PeopleSoft CRM, each business object can have multiple names. The business object name type classifies each associated name for informational purposes. A name type is required for each business object name record. A *Preferred* name must exist for a business object before you can use the business object in a transaction.

Business Object Name Type Enter the name type. The delivered name types are *Preferred*,*Alternate*, and *Merged.*

See Also

Chapter 4, "Defining Name and Address Information for Business Objects," page 51

Defining Role Types and Role Categories

To define business object role types, use the Role Type (BO_ROLE_TYPE) component.

This section discusses how to:

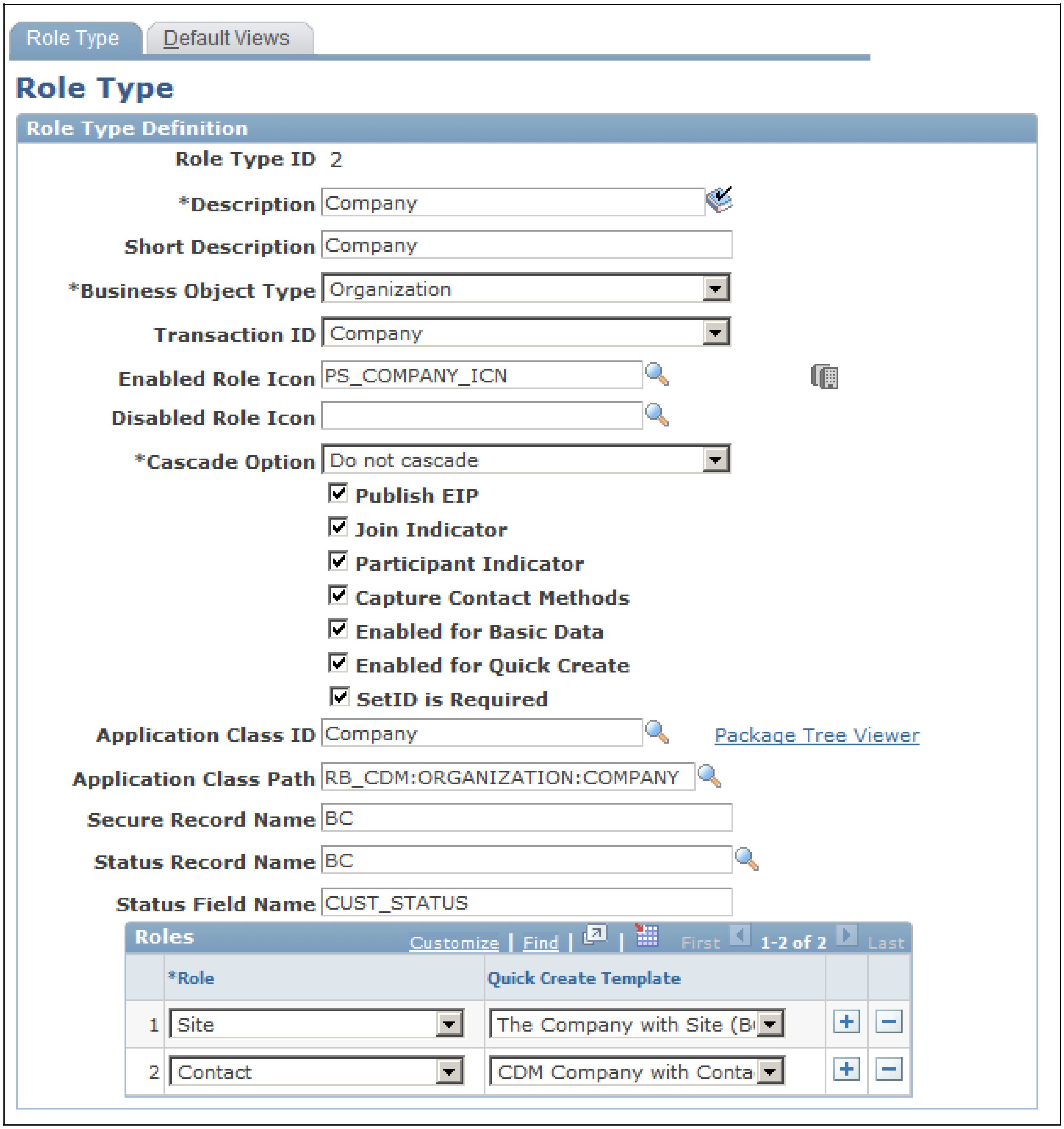
- Modify and add role types.
- Modify and adding role categories.

Pages Used to Define Role Types and Categories

Page Name	*Definition Name*	*Navigation*	*Usage*
Role Type	BO_ROLE_TYPE	Set Up CRM, Common Definitions, Customer, Role Type, Role Type	Modify and add role types.
Role Category	BO_SRCH_GROUP	Set Up CRM, Common Definitions, Customer, Role Category, Role Category	Modify and add role categories. Generally, role categories serve a specific processing purpose, such as a business object directory search process.

Modifying and Adding Role Types

Access the Role Type page (Set Up CRM, Common Definitions, Customer, Role Type, Role Type).



Role Type page

When you open a role type that is delivered as system data, the role type information appears in display-only format. To update the role type, click the Modify System Data button.

Important! Oracle does not support changes to the system data that is delivered with PeopleSoft CRM.

Role Type ID	Displays the identification code that is associated with the business object role type. When you add a new role type, the system automatically assigns a value by using automatic numbering functionality.

Transaction ID	Select the component transfer navigation definition that is associated with the role type.
Enabled Role Icon and **Disabled Role Icon**	Select an image to visually indicate the role status in various parts of the PeopleSoft CRM system, such as in the Relationship Viewer and Customer Data Management components.
Cascade Option	Select *Cascade* to automatically update addresses for all related business objects whenever you update an address for a business object. For example, when a company changes its address, the system automatically updates the addresses for all company contacts that have the same address. ***Warning!*** Selecting this option triggers multiple database operations when you update contact methods, which can severely degrade system performance. Oracle recommends that you enable this option only before a primary address change and disable it immediately afterward.
Publish EIP (publish enterprise integration points)	Select to include the role data when publishing a Customer Data Management (CDM) application message. If a business object has several roles, you can use this option to limit the roles for which data is published.
Join Indicator	Select to indicate a role that is assigned to business objects and exists primarily for group participant business objects. For example, you might create a household business object to group the people who live at a specific address.
Participant Indicator	Select to indicate a role that is assigned to business objects that participate in relationships with a business object that has a joining role. For example, you might create a household member role to assign to the people who live at a specific address.
Capture Contact Methods	Select to indicate that you want to capture contact methods for this role type.
Enabled for Basic Data	Select to automatically run the PeopleTools BO_BAS_LOAD Application Engine process to update the basic data tables (BO_BASIC_ORG and BO_BASIC_IND) whenever you update data that pertains to this role. Basic data integrates with PeopleSoft Marketing and PeopleSoft Online Marketing. If you do not select this option, you must run the application engine process manually. See and Chapter 2, "Understanding Business Object Relationship Model Components," Basic Data Tables, page 11.
Enabled for Quick Create	Select to enable the quick create function to use this role. **Note.** This option is disabled for the partner role.

SetID Required

Select to require the entry of a setID when creating a business object with this role by using the quick create function.

See and Chapter 14, "Using Business Object Search and Quick Create Functionality," page 303.

Application Class ID and **Application Class Path**

Select the ID and path for the application class that encapsulates the business logic of the role that is denoted by this role type. For example, the contact role is supported by the contact application class.

Package Tree Viewer

Click to view the available application classes that are provided by PeopleSoft CRM. When you click this link, the Application Packages Lookup page appears.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook,* "Using Application Classes."

Secure Record Name

Enter a record name to enable setID security searching.

Status Record

Enter the name of the record that contains the role status to enable business object searching by status.

Status Field Name

Enter the name of the field that contains the role status to enable business object searching by status.

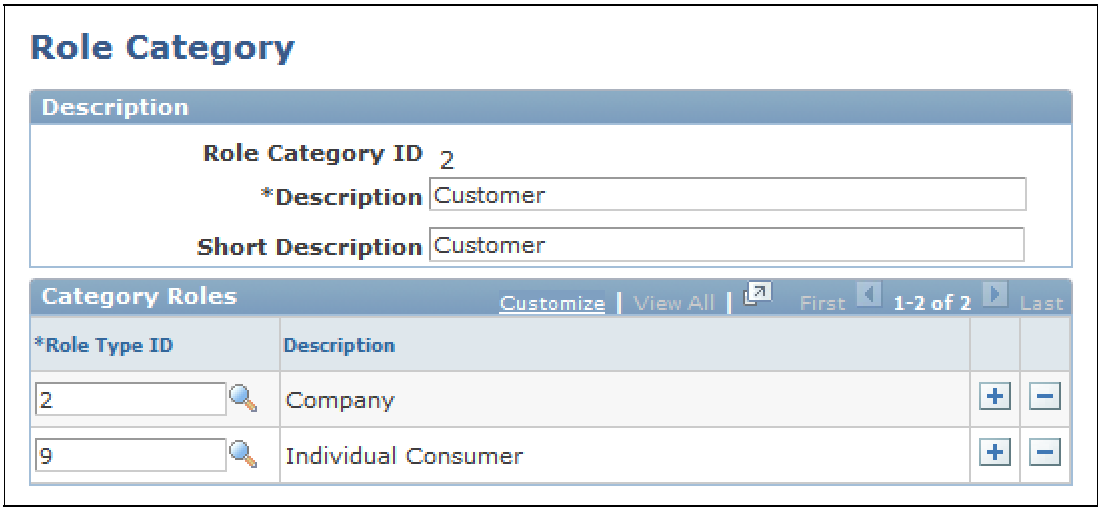
See Also

Chapter 3, "Defining Control Values for Business Objects," Defining Component Transfer Navigation, page 40

Chapter 14, "Using Business Object Search and Quick Create Functionality," page 303

Modifying and Adding Role Categories

Access the Role Category page (Set Up CRM, Common Definitions, Customer, Role Category, Role Category).



Role Category page

When you open a role category record that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the Modify System Data button.

Important! Oracle does not support changes to the system data that is delivered with PeopleSoft CRM.

Role Category ID Displays the identification code that is associated with the business object role category. When you add a new role category, the system automatically assigns a value by using automatic numbering functionality.

Defining Relationship Types and Relationship Categories

To define relationship types and relationship categories, use the Relationship Type (BO_REL_TYPE) and Relationship Category (BO_REL_CATEGORY) components.

This section discusses how to:

- Modify and add relationship types.
- Define relationship categories.

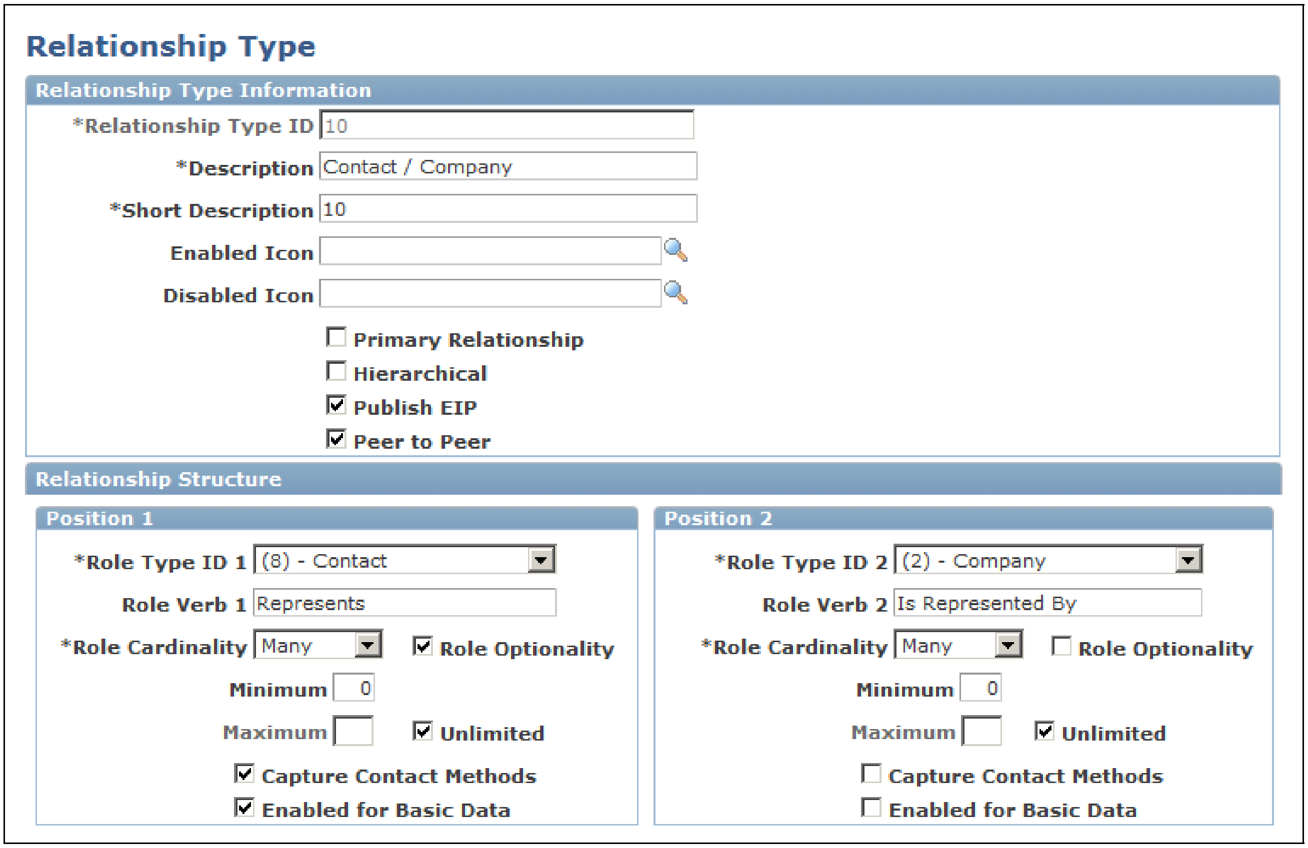
Pages Used to Define Relationship Types and Relationship Categories

Page Name	*Definition Name*	*Navigation*	*Usage*
Relationship Type	BO_REL_TYPE	Set Up CRM, Common Definitions, Customer, Relationship Type, Relationship Type	Modify and add relationship types.

Page Name	Definition Name	Navigation	Usage
Relationship Category	BO_REL_CATEGORY	Set Up CRM, Common Definitions, Customer, Relationship Category, Relationship Category	Define categories of relationships.

Modifying and Adding Relationship Types

Access the Relationship Type page (Set Up CRM, Common Definitions, Customer, Relationship Type, Relationship Type).



Relationship Type page

When you open a relationship type record that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the Modify System Data button.

Important! Oracle does not support changes to the system data that is delivered with PeopleSoft CRM.

Relationship Type ID Displays the identification code that is associated with the relationship type.

Primary Relationship	Indicates that the relationship is coupled with another relationship type. Only one primary relationship can exist at one time; all others are secondary, with different relationship types. When you select Primary Relationship, another field appears where you can enter the secondary relationship type.
Hierarchical	Select to define a hierarchical relationship. Relationship hierarchies show parent-child relationships between business objects and are graphically represented with a tree format in the relationship viewer. In hierarchical relationships, the business object participating in the Role Type ID 1 field is interpreted as the parent, and the business object in Role Type ID 2 is the child.
Peer to Peer	Select to define a peer-to-peer relationship. Peer-to-peer relationships are appropriate between two business objects with a type of *Individual* that share a direct relationship to a third business object.
Publish EIP (publish enterprise integration points)	Select to include the relationship data when publishing a CDM application message.

Relationship Structure

A relationship occurs between two business objects, each of which plays a specific role in the relationship. The relationship structure defines the two role types that define the relationship type, together with cardinality information, such as the number of business objects that can participate in a specified role for the relationship type.

Role Type ID 1 and **Role Type ID 2**	Select the role types that can participate in the relationship. Role types are established on the Role Type page.
Role Verb 1and**Role Verb 2**	Enter a verb clause that describes the role played by business objects that participate in the relationships of this type.
Role Cardinality	Select the number of business objects that can participate in the relationship role: *One* or *Many*. If the value is *One* for role type 1 or 2, only one business object is defined in the specified role for a given instance of the relationship. If the value is *Many*, you can define minimum and maximum values for the number of business objects that are defined in the specified role.
Role Optionality	Select if this type of relationship is required when you add a role.
Minimum and **Maximum**	Enter the minimum and maximum values for the number of objects that can participate in this relationship. If no maximum constraint exists, select the Unlimited check box.

Capture Contact Methods Select the parties in the relationship for which you want to capture contact methods. For example, when capturing the contact methods for a contact in a relationship with a company, you do not specify a relationship contact method for the company, but you do specify a relationship contact method for the contact.

Enabled for Basic Data PeopleSoft CRM uses this field in system data to determine whether a summarization of information (basic data) is stored for the relationship. Basic data integrates with PeopleSoft Marketing and PeopleSoft Online Marketing.

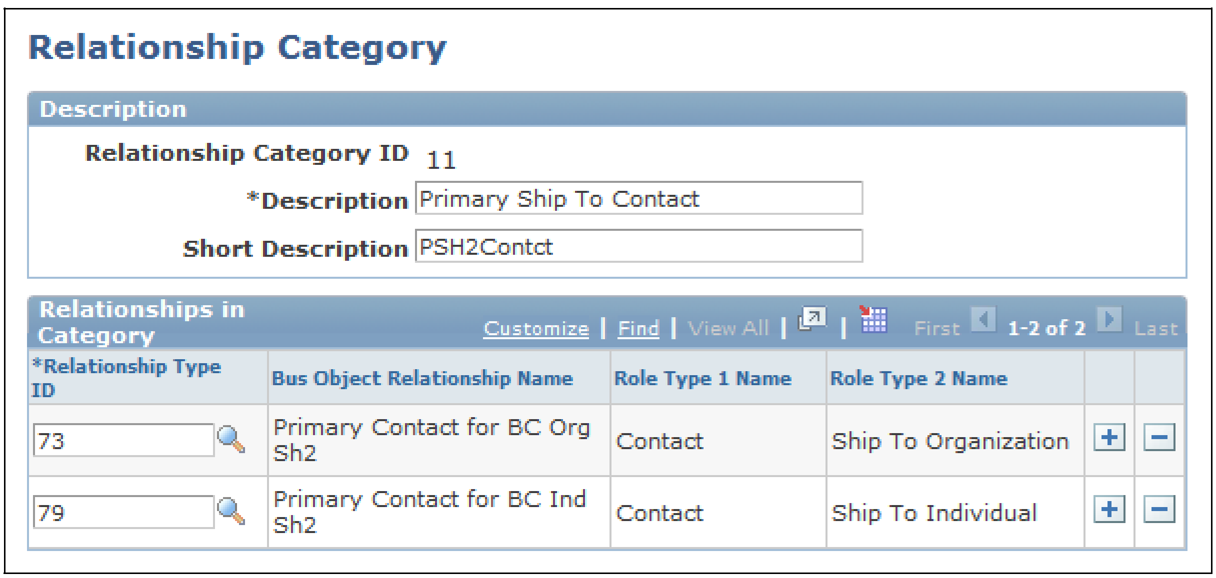
Note. To use the relationship viewer with a specific role type, configure the role in a relationship by using the Configure Relationship Views component, which you access by selecting Set Up CRM, Common Definitions, Customer.

See Also

Chapter 8, "Working with the Relationship Viewer," page 121

Defining Relationship Categories

Access the Relationship Category page (Set Up CRM, Common Definitions, Customer, Relationship Category, Relationship Category).



Relationship Category page

When you open a relationship category record that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the Modify System Data button.

Important! Oracle does not support changes to the system data that is delivered with PeopleSoft CRM.

Relationship Category ID — Displays the identification code that is associated with the relationship category. When you add a new relationship category, the system automatically assigns a value by using automatic numbering functionality.

See Also

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

Configuring Address Books

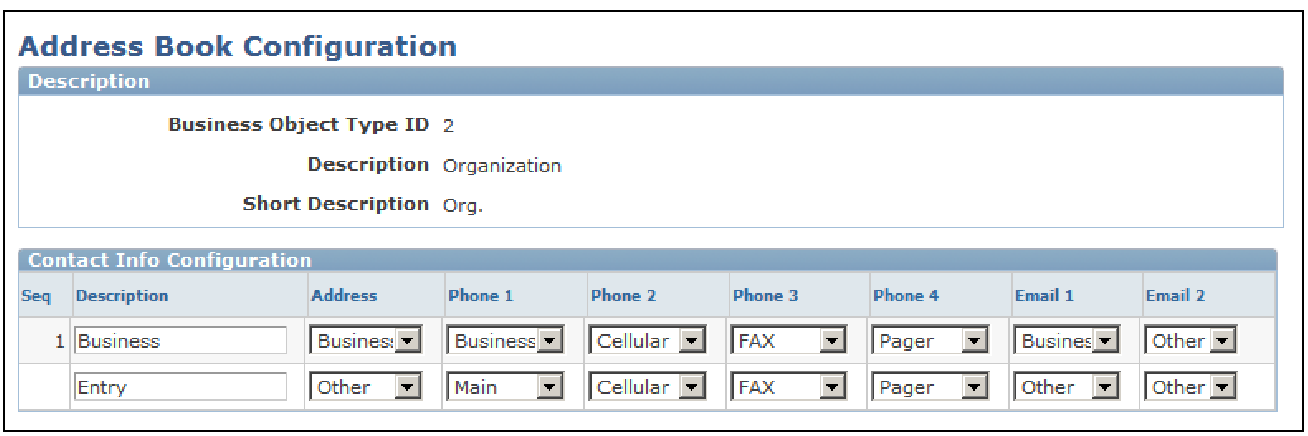
This section discusses how to define contact information entries.

Page Used to Configure Address Books

Page Name	*Definition Name*	*Navigation*	*Usage*
Address Book Configuration	BO_TYPE_ABE	Set Up CRM, Common Definitions, Customer, Address Book Configuration, Address Book Configuration	Define contact information entries for a business object type.

Defining Contact Information Entries

Access the Address Book Configuration page (Set Up CRM, Common Definitions, Customer, Address Book Configuration, Address Book Configuration).



Address Book Configuration page

Contact Info Configuration

Description

Enter a description to uniquely identify a contact information entry for the business object type. The contact method types that you select become the default labels on the Contact Info (contact information) page. You can change these labels when you enter information for this contact method information.

See Also

Chapter 4, "Defining Name and Address Information for Business Objects," Address Books in CRM, page 52

Chapter 4, "Defining Name and Address Information for Business Objects," Contact Information on CRM Components, page 53

Setting Up Contact Methods

To set up contact methods, use the Contact Method Type (CM_TYPE), Contact Method Purpose Type (CM_PURPOSE_TYPE), and Contact Method Use (CM_USE) components.

This section discusses how to:

- Maintain contact method uses.
- Modify contact method types.
- Maintain or add contact method purpose types.

Pages Used to Set Up Contact Methods

Page Name	*Definition Name*	*Navigation*	*Usage*
Contact Method Use	CM_USE	Set Up CRM, Common Definitions, Customer, Contact Method Use, Contact Method Use	Maintain contact method uses.
Contact Method Type	CM_TYPE	Set Up CRM, Common Definitions, Customer, Contact Method Type, Contact Method Type	Maintain contact method types.

Page Name	***Definition Name***	***Navigation***	***Usage***
Contact Method Purpose Type	CM_PURPOSE_TYPE	Set Up CRM, Common Definitions, Customer, Contact Method Purpose Type, Contact Method Purpose Type	Maintain or add contact method purpose types.

Maintaining Contact Method Uses

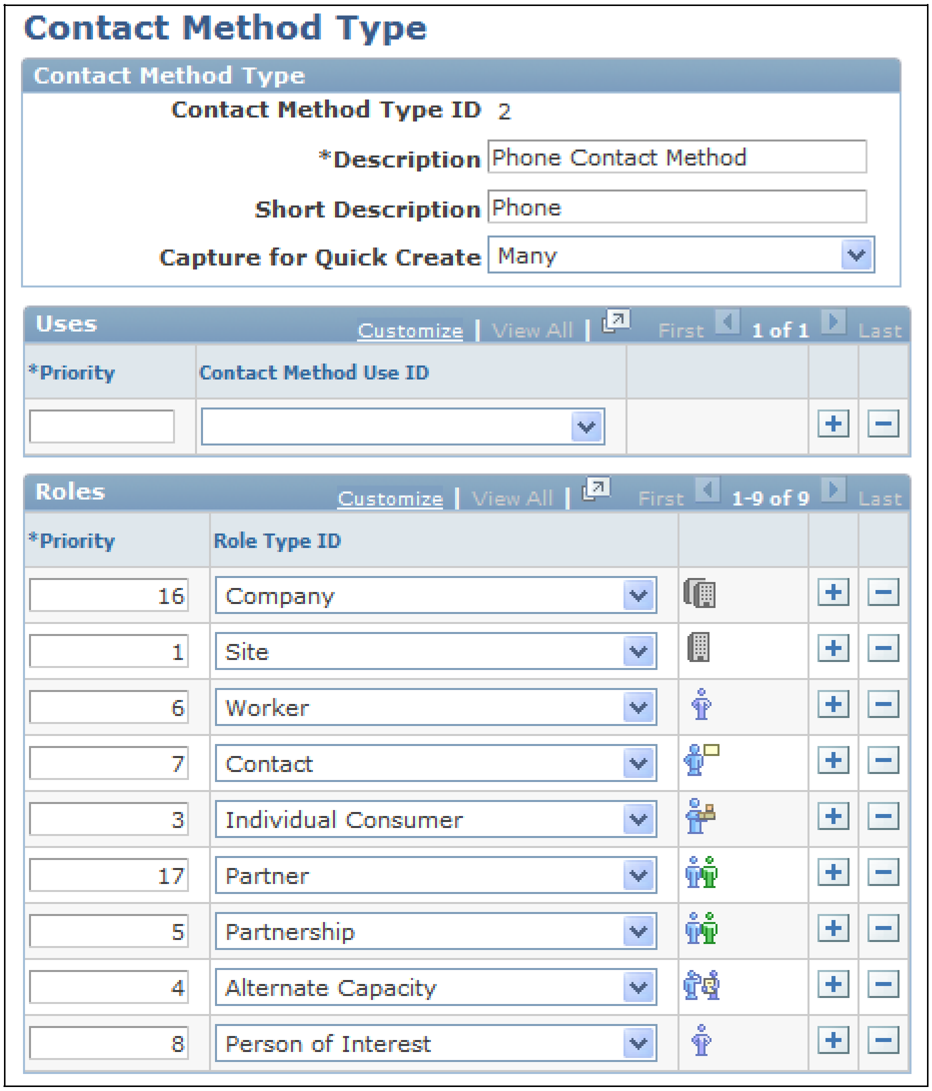
Access the Contact Method Use page (Set Up CRM, Common Definitions, Customer, Contact Method Use, Contact Method Use).

Description Enter a description for the contact method use.

Use Icon Select the icon that you want to associate with this contact method use. After you select the icon, the actual icon appears to the right of the field.

Modifying Contact Method Types

Access the Contact Method Type page (Set Up CRM, Common Definitions, Customer, Contact Method Type, Contact Method Type).



Contact Method Type

Contact Method Type

Contact Method Type ID 2

*Description: Phone Contact Method

Short Description: Phone

Capture for Quick Create: Many

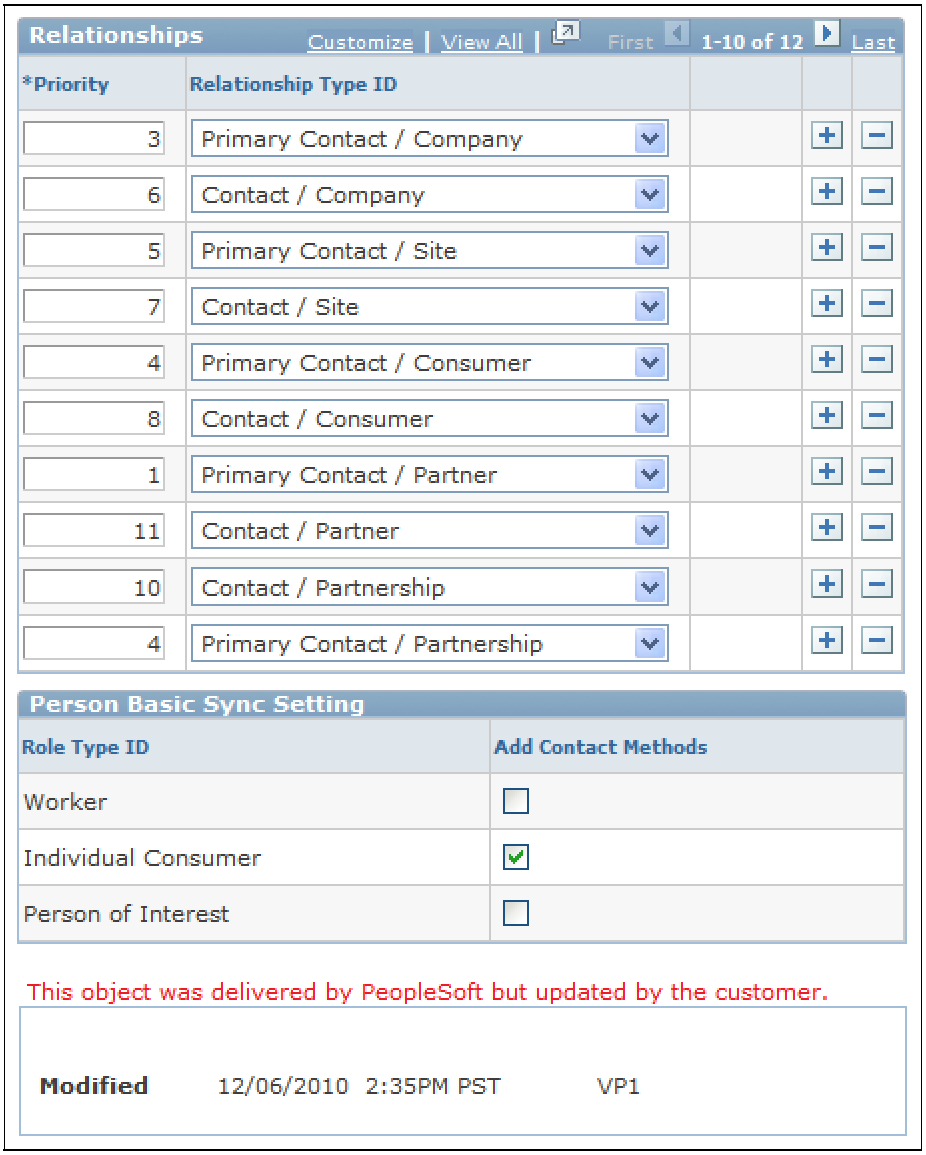
Uses — Customize | View All | First 1 of 1 Last

*Priority	Contact Method Use ID

Roles — Customize | View All | First 1-9 of 9 Last

*Priority	Role Type ID
16	Company
1	Site
6	Worker
7	Contact
3	Individual Consumer
17	Partner
5	Partnership
4	Alternate Capacity
8	Person of Interest

Contact Method Type page (1 of 2)



Contact Method Type page (2 of 2)

When you open a business object contact method type record that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the Modify System Data button.

Important! Oracle does not support changes to the system data that is delivered with PeopleSoft CRM.

Contact Method Type

Information about the contact method type appears in this page region.

Contact Method Type ID Displays the identification code that is associated with the contact method type. When you add a new contact method type, the system assigns a value by using automatic numbering functionality.

Uses

If you define contact method uses, you can associate uses with the contact method here.

Contact Method Use ID Select the contact method uses that you want to associate with the contact method type.

Roles

Displays the roles that are associated with a contact method and enables you to add new roles or modify existing ones.

Priority Enter a priority for listing the role on the contact method detail pages.

Relationships

Displays the relationships that are associated with a contact method and enables you to add new relationships or modify existing ones.

Priority Enter a priority for listing the relationship on the contact method detail pages.

Person Basic Sync Setting

Displays the roles for which new contact method entries of this contact method type will be created for a customer when new contact data is received through the Person Basic Sync EIP. Supported roles are *Individual Consumer,Worker,* and *Person of Interest.*

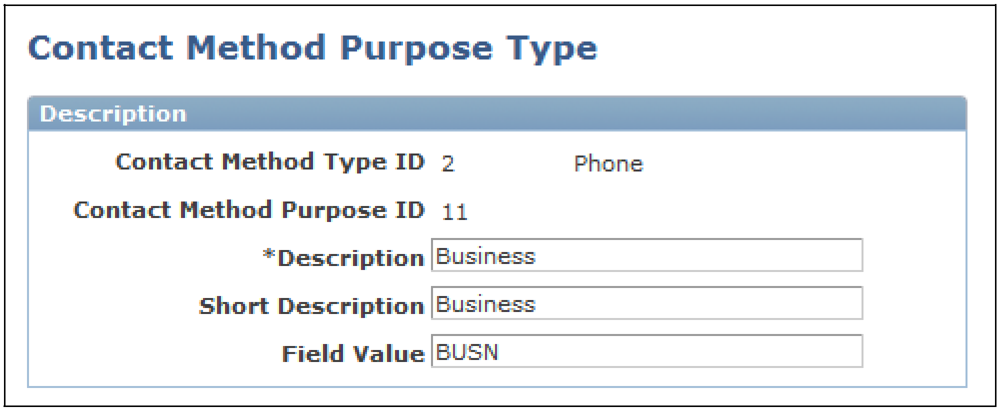
Add Contact Methods Select roles for which new entries of this type will be created via EIP. Selecting this check box indicates Person Basic Sync will create new contact methods of this type for the designated role if the role exists for the person.

See Also

Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," Integration with PeopleSoft HCM, PeopleSoft Campus Solutions or Third-Party HR Data, page 352

Maintaining or Adding Contact Method Purpose Types

Access the Contact Method Purpose Type page (Set Up CRM, Common Definitions, Customer, Contact Method Purpose Type, Contact Method Purpose Type).



Contact Method Purpose Type page

When you open a contact method purpose type that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the Modify System Data button.

Important! Oracle does not support changes to the system data that is delivered with PeopleSoft CRM.

Contact Method Type ID Displays the contact method type with which the contact method purpose is associated.

Contact Method Purpose ID Displays the identification code that is associated with the contact method purpose type. When you add a contact method purpose type, the system assigns a value by using automatic numbering functionality.

Field Value Enter a value to map contact method purpose types in PeopleSoft CRM to corresponding translate values in PeopleSoft Supply Chain Management and third-party systems.

Defining Component Transfer Navigation

To define component transfer navigation, use the Component Navigation (RB_TXN_DEFN) component.

This section discusses how to define component transfer navigation paths.

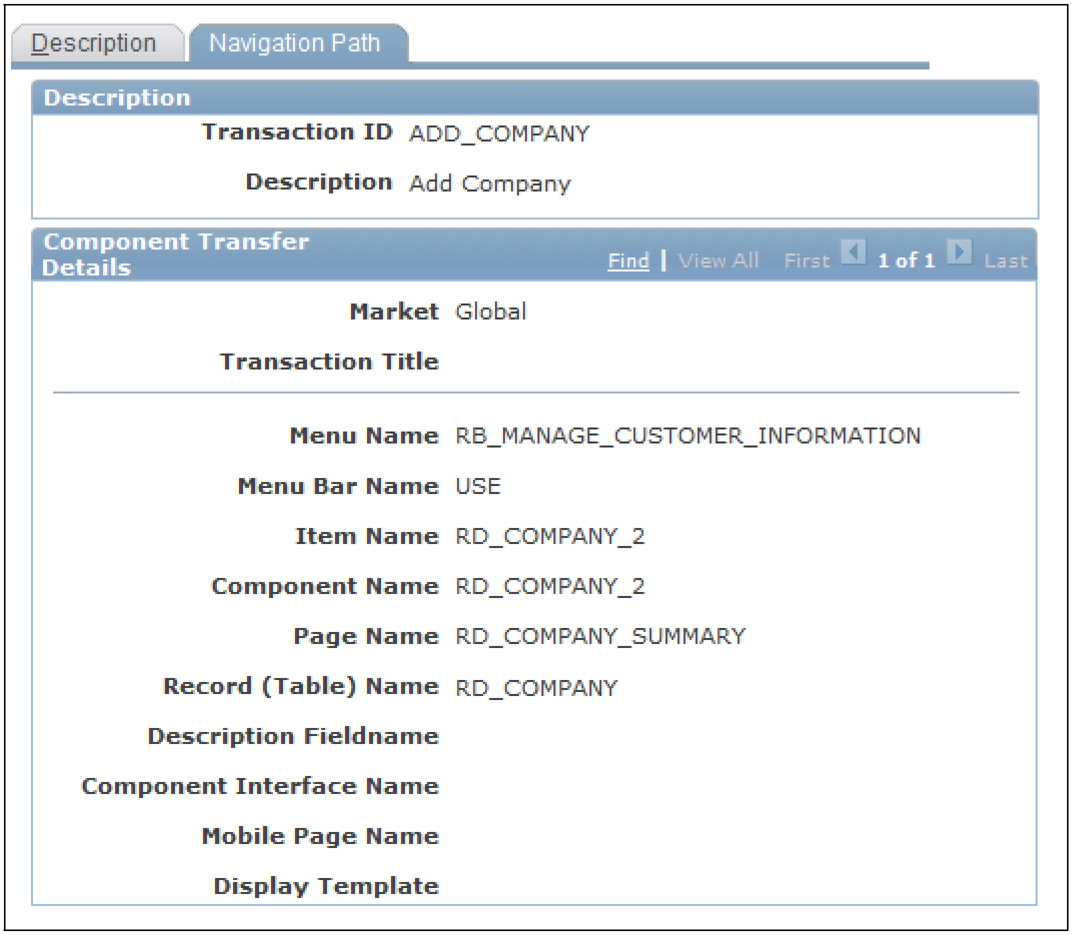
Pages Used to Define Component Transfer Navigation

Page Name	*Definition Name*	*Navigation*	*Usage*
Component Navigation - Description	RB_TXN_DEFN	Set Up CRM, Common Definitions, Component Configuration, Component Navigation, Description	Maintain component transfer navigation descriptions.

Page Name	*Definition Name*	*Navigation*	*Usage*
Component Navigation - Navigation Path	RB_TXN_MKT	Set Up CRM, Common Definitions, Component Configuration, Component Navigation, Navigation Path	Define component transfer navigation paths (the locations of the transaction pages to which users are transferred).

Defining Component Transfer Navigation Paths

Access the Component Navigation - Navigation Path page (Set Up CRM, Common Definitions, Component Configuration, Component Navigation, Navigation Path).



Component Navigation - Navigation Path page

Note. To enable component transfers, enter a value for each of the fields on this page.

Market

Specify the name of the market with which the component is associated. A component is uniquely identified by its name and its market association. You can add records for each market.

Menu Name,Menu Bar Name, Item Name,Component Name,and **Page Name** — Enter the complete navigation for the page to which the users transfer. Enter the PeopleSoft PeopleTools object names for the menu, menu bar, item name, component name, and page name.

Record (Table) Name — Select the object name for the table that is populated by the specified page. Typically, this is the search record.

Defining Segment Codes

To define segment codes, use the Segment Code (RD_SEGMENT) component.

This section discusses how to define segment codes.

Page Used to Define Segment Codes

Page Name	*Definition Name*	*Navigation*	*Usage*
Segment Code	RD_SEGMENT	Set Up CRM, Common Definitions, Customer, Segment Code, Segment Code	Define codes that represent customer attributes, such as a customer's market segment, priority, or value. For informational purposes, you can associate each company and consumer with a segment code.

Defining Segment Codes

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

Segment codes enable you to define customer attributes that are important for your business objectives. For example, you can use segment codes to define a customer's market segment, priority, or total value to your enterprise. Segment codes are informational in PeopleSoft CRM. However, you can develop reports based on the segment codes that are associated with your customers.

Defining Industries

To define industries, use the Industry (RSF_INDUSTRY) component.

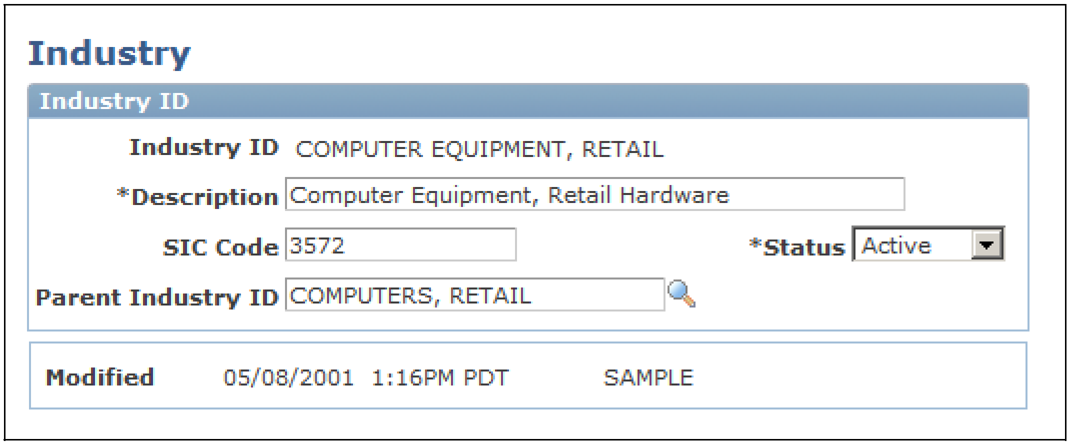
This section discusses how to define industries.

Page Used to Define Industries

Page Name	Definition Name	Navigation	Usage
Industry	RSF_INDUSTRY	Set Up CRM, Common Definitions, Customer, Industries, Industry	Define industries.

Defining Industries

Access the Industry page (Set Up CRM, Common Definitions, Customer, Industries, Industry).



Industry page

SIC Code (standard industrial classification code) — Enter the standard industrial classification code for this industry.

Parent Industry ID — Enter the parent industry for this industry.

See Also

Chapter 9, "Defining Company Business Objects," page 137

Defining National ID Types

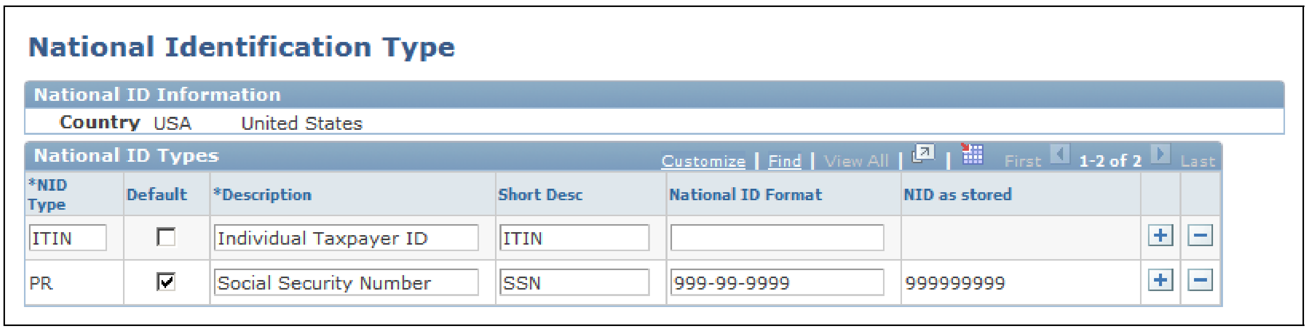
This section discusses how to define national ID types.

Page Used to Define National ID Types

Page Name	***Definition Name***	***Navigation***	***Usage***
National Identification Type	NID_TYPE_TABLE	Set Up CRM, Common Definitions, Customer, National ID Type, National Identification Type	Define national ID types.

Defining National ID Types

Access the National Identification Type page (Set Up CRM, Common Definitions, Customer, National ID Type, National Identification Type).



National Identification Type page

NID Type(national identification type) Enter the type of national ID.

National ID Format Enter the format for the national ID.

See Also

Chapter 11, "Defining Person Business Objects," Defining Information for Business Contacts, page 184

Defining Customer Groups

To define customer groups, use the Customer Group Table (CUST_GROUP_TBL) component.

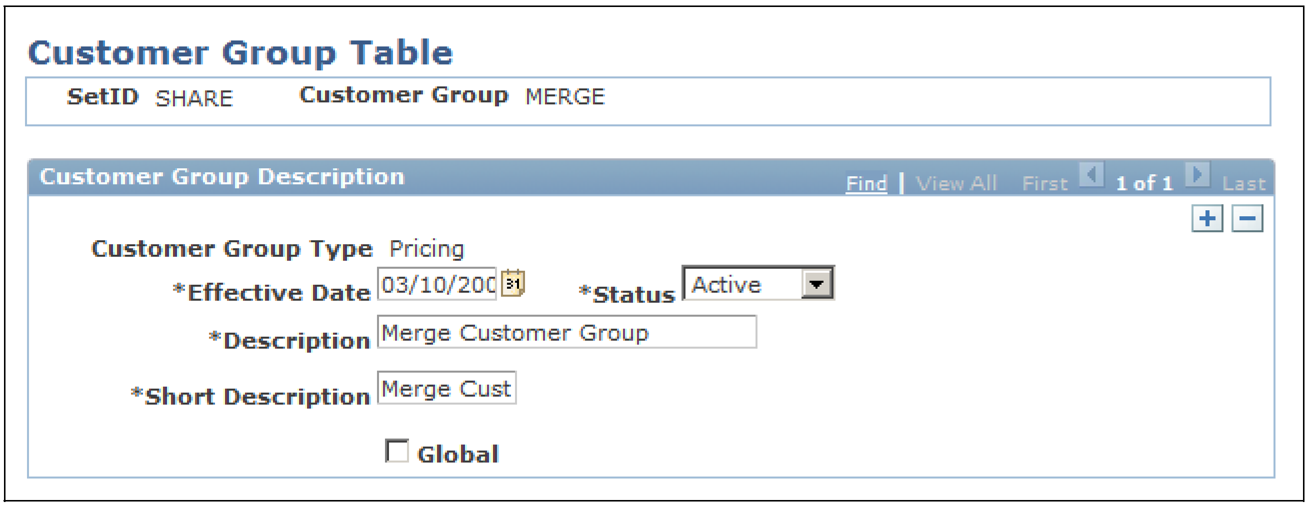
This section discusses how to define customer groups.

Page Used to Define Customer Groups

Page Name	*Definition Name*	*Navigation*	*Usage*
Customer Group Table	CUST_GROUP_TBL	Set Up CRM, Common Definitions, Customer, Customer Group, Customer Group Table	Define customer groups. You can assign customers to groups for reporting and administration purposes.

Defining Customer Groups

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



Customer Group Table page

Customer Group Type Enter the type of customer group. Available group types include Accounting, Allocation Group, Buying Agreement, Direct Debit, Forecasting, Freight, Pricing Arbitration Plan, Reporting, Tax, and Transportation.

Defining Customer Data Management System Options

To define customer data management system options, use the Customer Data Management System Options (BO_INSTALLATION) component.

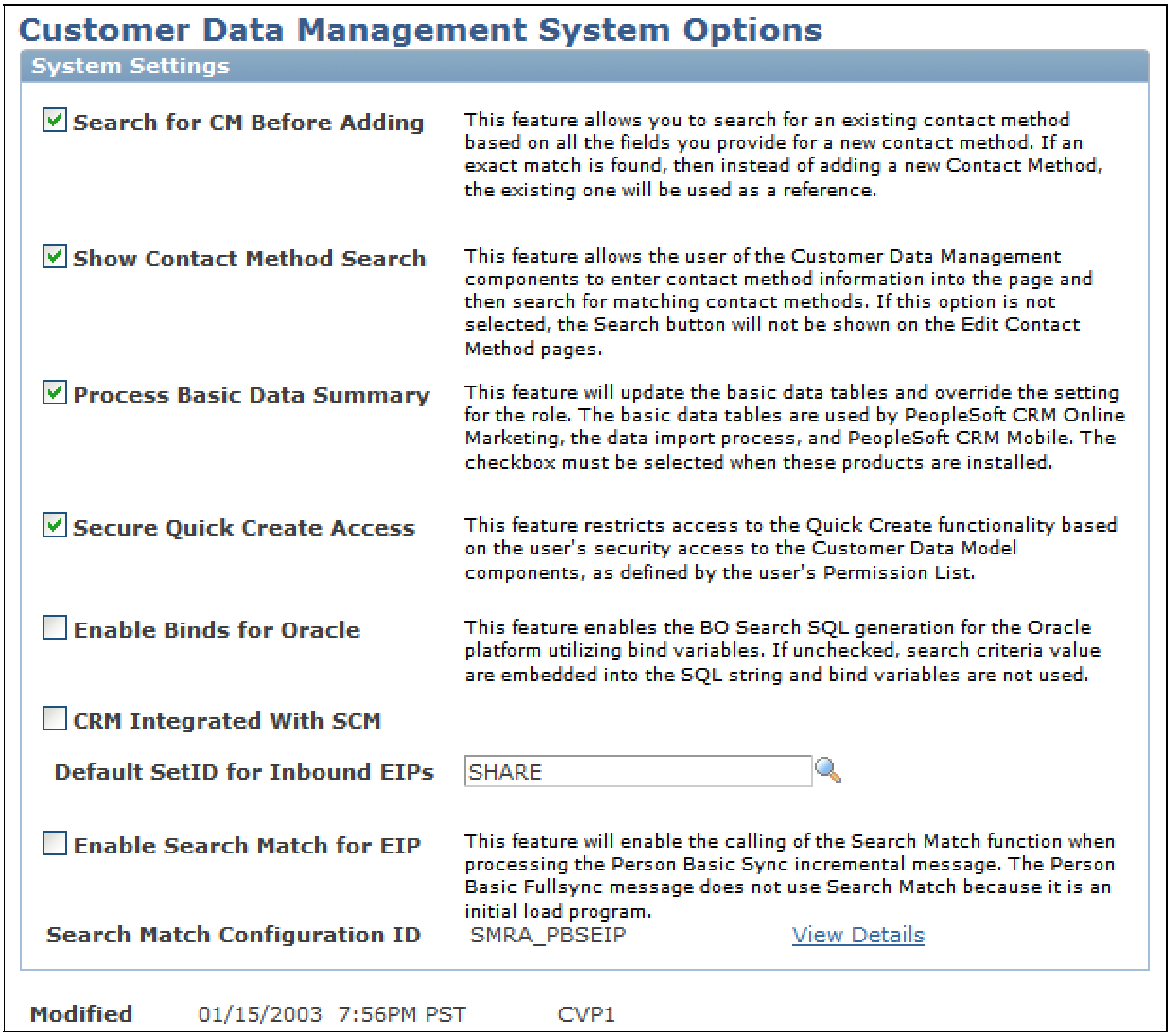
This section discusses how to define customer data management system options.

Page Used to Define Customer Data Management System Options

Page Name	*Definition Name*	*Navigation*	*Usage*
Customer Data Management System Options	BO_INSTALLATION	Set Up CRM, Common Definitions, Customer, Customer Installation Options, Customer Data Management System Options	Define customer data management system options.

Defining Customer Data Management System Options

Access the Customer Data Management System Options page (Set Up CRM, Common Definitions, Customer, Customer Installation Options, Customer Data Management System Options).



Customer Data Management System Options page

Process Basic Data Summary Select to update basic data tables during data import. Selecting this option overrides the setting for the role. The basic data tables are used by PeopleSoft CRM Online Marketing and the data import process.

Note. To improve system performance, clear this check box if you are not using any of these processes.

CRM Integrated With SCM Select if you will be integrating the PeopleSoft CRM application with PeopleSoft SCM using enterprise integration points.

Default SetID for Inbound EIPs (default setID for inbound enterprise integration points) Select the default setID. The CDM EIPs use this setID during the processing of the EIPs if no setID is provided on the incoming application messages.

See and Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," page 343.

Enable Search Match for EIP	See and *PeopleSoft CRM for Higher Education 9.1 PeopleBook*, "Recruiting Students," Using Search/Match with PERSON_BASIC_SYNC.
Search Match Configuration ID	See and *PeopleSoft CRM for Higher Education 9.1 PeopleBook*, "Recruiting Students," Using Search/Match with PERSON_BASIC_SYNC.

Defining Basic Data Mappings

This section discusses how to:

- Map CDM properties to basic data tables.
- Clone basic data mappings.

Note. The Basic Data Mapping component is hidden as delivered. It is intended for consultants and internal developers, and is not officially supported by Oracle.

To expose the component on the left hand navigation, navigate to PeopleTools, Portal, Structure and Content. Click the Set Up CRM link. The page refreshes. Click the Common Definitions link. The page refreshes again. Click the Customer link. Click the Edit link for the Basic Data Mapping label at the bottom of the page. On the Content Ref Administration page that appears, clear the Hide from portal navigation check box. Click Save. Log out, close the browser, clear the browser cache, and log in again for the change to take effect.

See Also

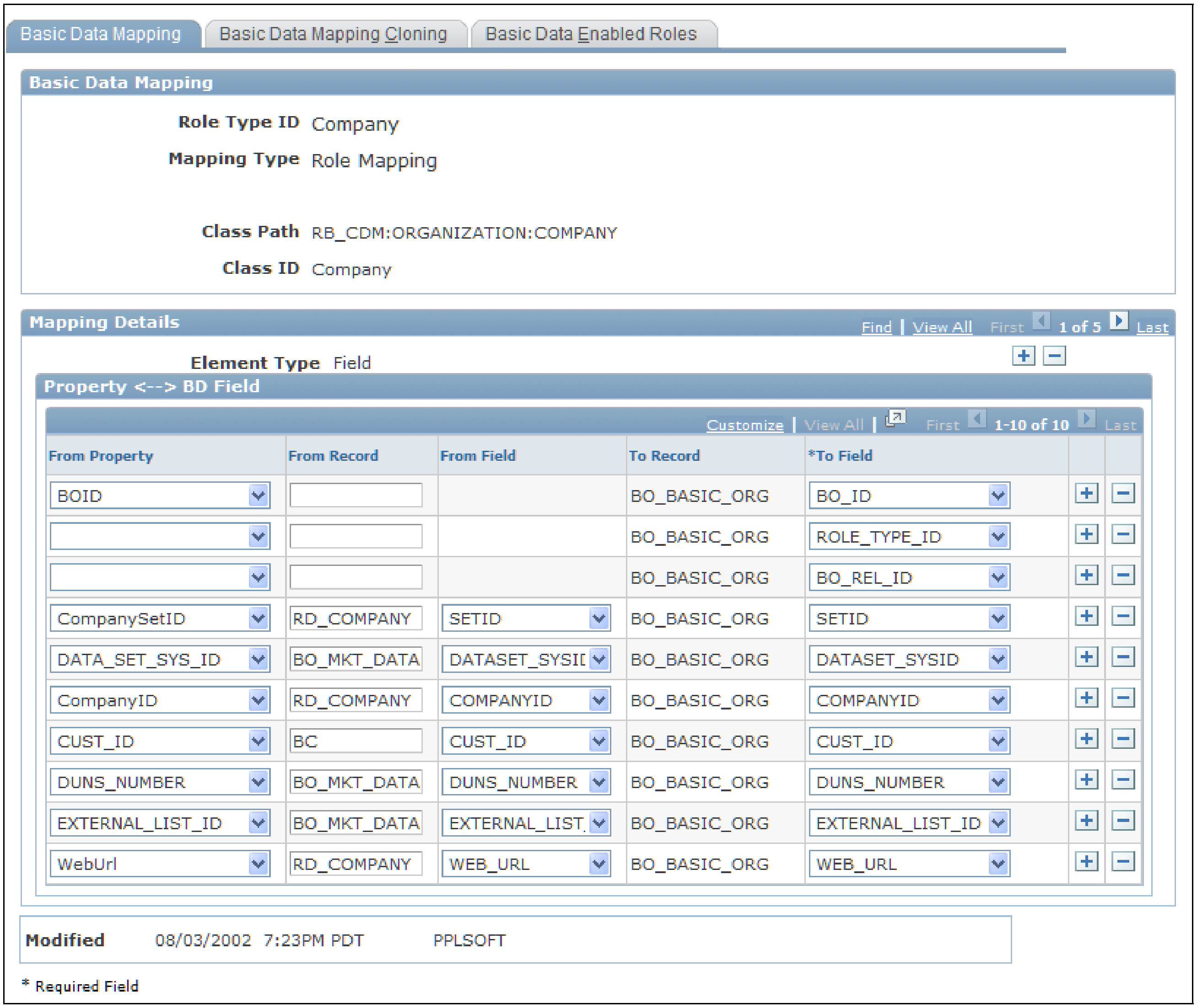
Chapter 2, "Understanding Business Object Relationship Model Components," Basic Data Tables, page 11

Pages Used to Define Basic Data Mappings

Page Name	*Definition Name*	*Navigation*	*Usage*
Basic Data Mapping	BO_ROLE_MAP	Set Up CRM, Common Definitions, Customer, Basic Data Mapping, Basic Data Mapping	Map CDM role and relationship properties to basic data tables.
Basic Data Mapping Cloning	BO_ROLE_MAP_CLONE	Set Up CRM, Common Definitions, Customer, Basic Data Mapping, Basic Data Mapping Cloning	Clone basic data mappings.
Basic Data Enabled Roles	BO_ROLE_MAP_ENABLE	Set Up CRM, Common Definitions, Customer, Basic Data Mapping, Basic Data Enabled Roles	View a summary list of the basic data mapping roles and relationships.

Mapping CDM Properties to Basic Data Tables

Access the Basic Data Mapping page (Set Up CRM, Common Definitions, Customer, Basic Data Mapping, Basic Data Mapping).



Basic Data Mapping page

Use this page to map properties from CDM records and fields to basic data records and fields. You can map either by role or relationship.

Basic Data Mapping

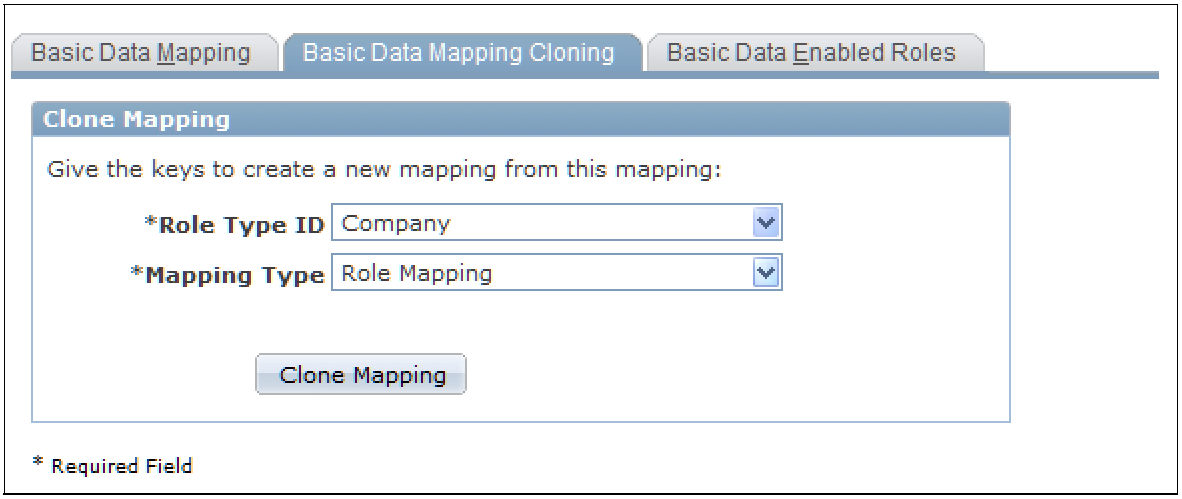
Information about the roles and relationships you are mapping appears in this page region. This is system data that you cannot modify on this page.

Property Mapping Details

Specify the source record and field and the target record and field for each property that is mapped.

Cloning Basic Data Mappings

Access the Basic Data Mapping Cloning page (Set Up CRM, Common Definitions, Customer, Basic Data Mapping, Basic Data Mapping Cloning).



Basic Data Mapping Cloning page

Clone Mapping

Select a role type and a mapping type to clone the current mapping that appears on the Basic Data Mapping page to another role type. For a mapping type of *Relationship Mapping,* the Relationship ID field appears.

You cannot overwrite an existing mapping by cloning a new mapping to it. The role type and mapping type that you specify must not currently exist in the system.

Chapter 4

Defining Name and Address Information for Business Objects

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

- Update name information for business objects.
- View summary contact information.
- Maintain contact information for business objects.
- Define customer contacts.
- Define customer sites.

Understanding Name and Address Information in CRM

This section lists common elements and discusses:

- Business object names in CRM.
- Address books in CRM.
- Contact information on CRM components.
- Contact information for business object relationships.

See Also

Chapter 9, "Defining Company Business Objects," page 137

Chapter 10, "Defining Site Business Objects," page 155

Chapter 11, "Defining Person Business Objects," page 167

Common Elements Used in this Chapter

Primary Name	The name that appears online when the business object is referenced in system transactions.

Contact Method Type

A method by which you contact a business object. CRM provides the *Address,Phone,* and *Email* contact methods with the system.

Contact Method Purpose Type

A further clarification of a contact method. As delivered, the *Home* and *Business* contact method purpose types are available for the Email contact method and the types *Home,Business,Fax,* and *Pager* contact method purpose types are available for the Phone contact method. CRM provides additional contact method purpose types that you can configure and you can define additional types as needed.

See and Chapter 3, "Defining Control Values for Business Objects," Contact Method Types and Contact Method Purpose Types, page 22.

Contact Info Entry (contact information entry)

A grouping of contact methods. As delivered, contact information entries in CRM can contain one address, up to two email addresses, and up to four phone numbers.

See and Chapter 3, "Defining Control Values for Business Objects," Configuring Address Books, page 34.

Address Book

The collection of contact info entries for a business object.

Consumer

A person business object that has the consumer role.

Business Object Names in PeopleSoft CRM

When you initially create a new company, consumer, contact, site, or worker business object, you enter the business object name. This becomes the *preferred* name for the business object and appears on the Summary page of the component. You can add *alternate* names for the business object. To edit a name, add alternate names, or change the preferred name, access the More Names page from the Details page of the component.

Important! Only the five most recently updated names are synced to the CDH. If you have more than five names for a business object and you want to ensure that the merged name is synced, you must update the merged name on the More Names page.

Address Books in CRM

Contact information for business objects is logically grouped into *address books,* which function in the same way as a personal address book. For example, a person named Larry Hill might give you his home address, email, and telephone number. If you also need to get in touch with Larry during the daytime or send him business correspondence, he might also give you a work address, cell phone number, pager number, and work email. If Larry operates out of two offices, you keep an *address book entry* for each of Larry's offices as well as for his home address. You can maintain address books for business objects and for sites and contacts of business objects.

Contact information entries on a component appears on both the Summary page and on a separate, more detailed Contact Info page.

Note. If an individual business object or an organizational business object (Partner/Company) has multiple roles, then the contact information defaults to both roles. For example, if Larry Hill is both a contact and a consumer, a phone number for Larry Hill phone number applies to both roles by default. The exception is the worker role. Since there may be security issues around the worker role, information does not default to or from this role. So if Larry is both a worker and a consumer, and you add a phone in the Worker component, it will only apply to Larry in the role of worker, not consumer.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up General Options," Setting Up Address Formats and Values

Contact Information on CRM Components

This section discusses:

- Summary contact information.
- Detailed contact information.
- Advanced options.
- Existing address searches.
- Contact method definition for business object roles.
- Contact method definition for business object relationships.

See and Chapter 3, "Defining Control Values for Business Objects," Defining Contact Information Entries, page 34.

Summary Contact Information

Contact information on the Summary page includes the address, two email address, and all four phone numbers. To view the complete contact information for a business object, you must use the Contact Info page that you can access either by clicking the More Info link on the Summary page or by selecting the Contact Info tab. By default, the first contact information entry in the address book appears for organization type business objects, and the first and second contact information entries appear for individual type business objects. You can specify the contact information entry that appears on the summary page by clicking the Set Display link.

Detailed Contact Information

The Contact Info page enables you to maintain the contact information for the business object and its associated sites and business contacts. You click the description for an entry to view and edit the entry's details or you can create a new entry. The advanced options on the Contact Info page enable you to manage contact methods independently of the contact information entry in which they are defined.

The Contact Info page enables you to view and update:

- Address information.

  You can add, view, or update address book entries. or view and update additional address, email, and phone contact information for an entry that is in the address book or to access additional entries. This page is the primary place where you maintain contact information for a business object. You can enter or update details of the contact methods that are associated with the business object or click the trash can button to cause all of the contact methods that are within the contact information entry to expire on the current date.

- Contacts.

  You can associate an existing business contact with a customer or create a new business contact to add to the customer. Contacts that are associated with customers can have address book entries and sites associated with them.

- Sites.

  You can create and update sites for a customer or contact.

Advanced Options

The Advanced Options section on the Contact Info page contains three tabs: Address,Email, and Phone. Each tab lists the entries that are defined for that particular contact method type. The Edit button for each entry provides the only access to the Contact Method Details page, where you can update the start and end dates for the contact method or associate the contact method with roles independently of the other contact methods in a contact info entry.

Existing Address Searches

You can search for existing addresses when you add or update address information. This enables you to find and modify an address that is similar to an existing address for a company, partner company, site, or person.

To search for an existing address, use one of the following two methods:

1. Enter any known address information, click the Look Up Address link on the Contact Info page for a company, consumer, contact, site, or worker, and select an address from the list of existing addresses. The system uses the information you enter as search criteria and returns any contact method records that match the criteria. You can select the applicable record, or, if none of the returned records apply, create a new contact record.

2. Enter known address information on the Update Address page and search for an existing address.

Note. Depending on the volume of addresses that are in the system and the number of search criteria that is entered, the address search feature can slow system performance.

Contact Method Definition for Business Object Roles

The contact methods that you define at the business object level are automatically associated with the role that the system assigns to the business object. For example, when you establish a business object using the Company component, the system assigns the Company role to the business object and creates contact method records for the role by using the contact information that you define. When you define a site business object by using the Site component or the Sites page in any other component, the system assigns the site role to the business object and records the contact information that you define for the site at both the business object and role levels.

Contact Method Definition for Business Object Relationships

When you associate a contact or site with a customer, you can define separate contact methods that apply only to the relationship between a customer and its contacts or between a customer and its sites.

Address information for a new contact or site is usually similar to address information that was previously defined in the system. CRM provides you with the capability to search for address information that was previously defined when you add contacts or sites to a business object. For example, when you define a contact for a company, you can use an existing address with perhaps a modified mail stop number for the contact.

If CDH and DQM are installed, you can select two or more contacts or sites and submit them for merge evaluation.

Updating Name Information

This section discusses how to add and update names.

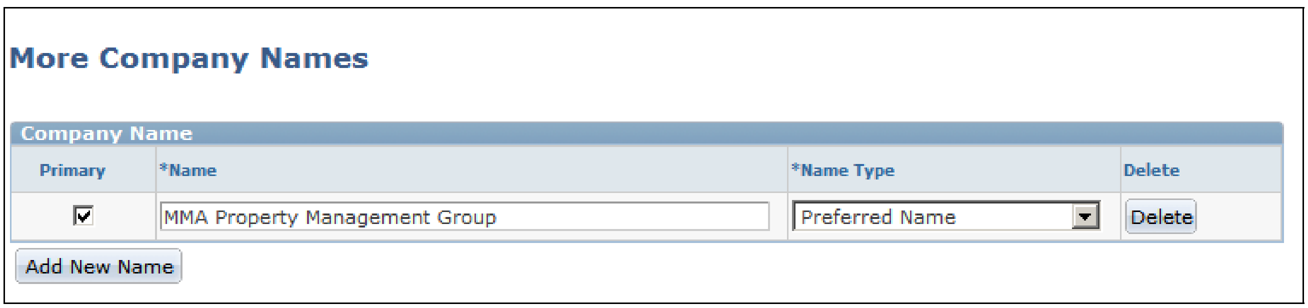
Pages Used to Update Name Information

Page Name	*Definition Name*	*Navigation*	*Usage*
Company - Details	RD_COMPANY_DETAILS	• Customers CRM, Add Company, Company, Details • Customers CRM, Search Company, Company, Summary Click the Details link.	Add or modify a company name.
Person - Details	RD_PERSON_DETAILS	• Customers CRM, Add Person, Person, Details • Customers CRM, Search Person, Person, Summary Click the Details link.	Add or modify a person's name.
Site - Name	RD_SITE_NAME_PG	• Customers CRM, Add Site, Site, Primary Click the Name link. • Customers CRM, Search Site, Site, Primary Click the Name link	Add or modify a site name.

Page Name	***Definition Name***	***Navigation***	***Usage***
Partner Company - Details	RD_PARTNER_DETAILS	• Partners CRM, Add Partner Company, Partner Company, Details • Partners CRM, Search Partner Company, Partner Company, Summary Click the Details link.	Add or modify a partner company name.
Company - More Names Person - More Names Partner Company - More Names Site - More Names	RD_MORE_NAMES_SEC	Click the More Names link on the Details page for a company, person, or partner company.	• Add and update names. • Designate a primary name.

Adding and Updating Names

Access the More Names page for a company, person, site, or partner company (click the More Names link on the Details page for a company, person, or partner company).



More Names page

Primary Select to indicate a primary name for the company or site. When you initially create the component, the name that you enter on the Detail page is the default primary name record for the company or site business object.

Name Type Select the type of name, *Preferred Name*,*Alternate Name.*, or *Merged.*

Add New Name Click to enter an additional name.

See Also

Chapter 3, "Defining Control Values for Business Objects," Defining Business Object and Name Types, page 25

Managing Summary Contact Information

This section lists the pages used to manage summary contact information.

Pages Used to Manage Summary Contact Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Company - Summary	RD_COMPANY_SUMMARY	Customers CRM, Search Company, Company, Summary, Summary	View name and primary contact information for a company and the primary contact of the Company (if available).
Company - Details	RD_COMPANY_DETAILS	Customers CRM, Search Company, Company, Summary, Details	Maintain the first contact information entry for the company.
Partner Company - Summary	RD_PARTNER_SUMMARY	Partners CRM, Search Partner Company, Partner Company, Summary, Summary	View name and primary contact information for a partner company and the primary contact of the Partner Company (if available).
Partner Company - Details	RD_PARTNER_DETAILS	Partners CRM, Search Partner Company, Partner Company, Summary, Details	Maintain the first contact information entry for the partner company.
Site - Primary	RD_SITE_MAIN_2	Customers CRM, Search Site, Site, Primary	View the name and maintain the first contact information entry of a Site, Service Location in the FIN component, Partnership, or Alternate Capacity business object.
Person - Primary	RD_PRSN_PRIMARY	• Customers CRM, Search Person, Person, Primary • Customers CRM, Add Person, Person, Primary	View the name and maintain the first and second contact information entries of a person, worker, or client.

Maintaining Contact Information for Business Objects

This section discusses how to:

- Access contact information.
- Maintain contact information.
- Select existing addresses.
- Update address detail.
- Update phone detail.
- Update email detail.

Pages Used to Maintain Contact Information

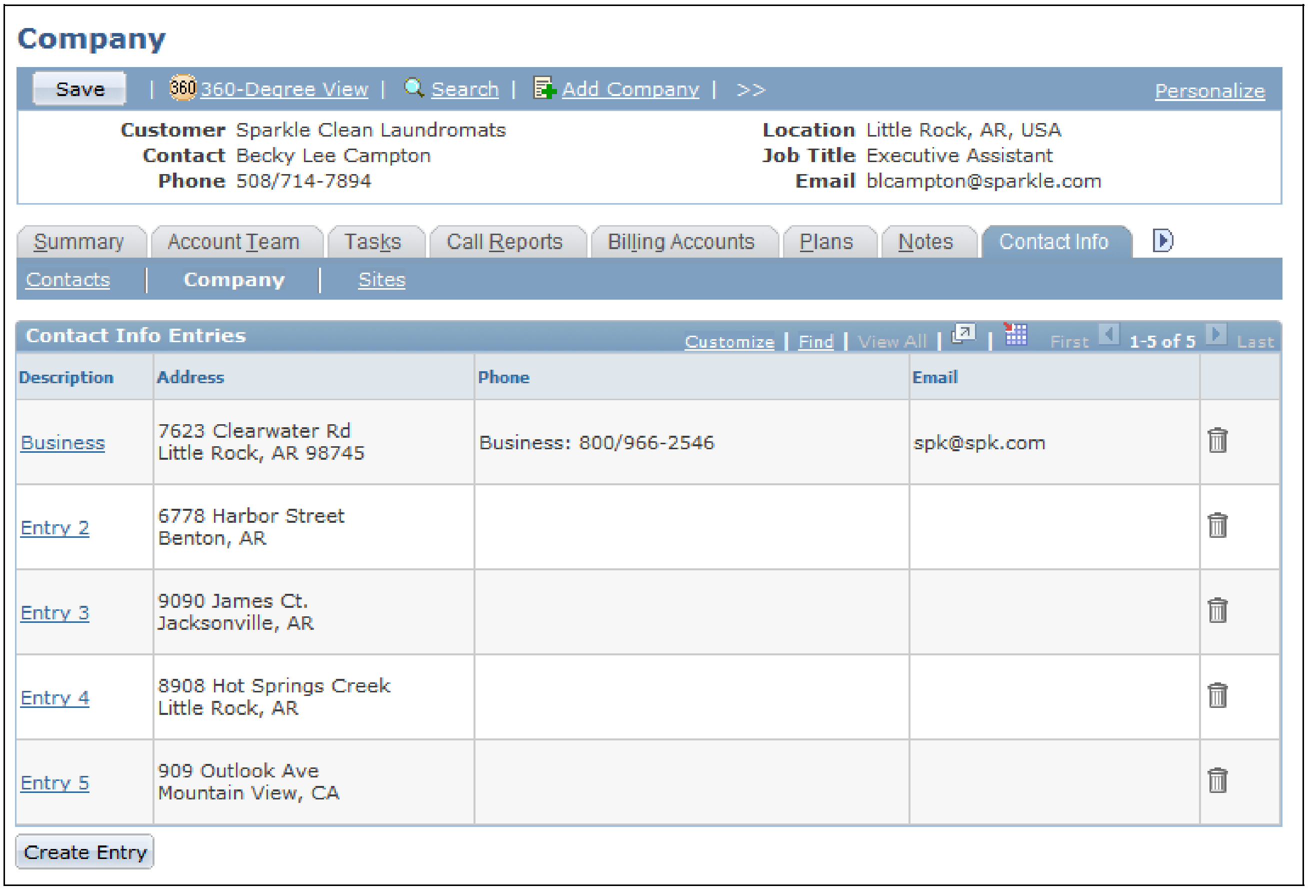
Page Name	***Definition Name***	***Navigation***	***Usage***
Person - Contact Info	RD_PRSN_ADDR_BOOKS	• Customers CRM, Add Person, Person, Contact Info • Customers CRM, Search Person, Person, Contact Info	Access contact information for a person, worker, or contact.
Company - Contact Info	RD_COMP_ADDR_BOOK	• Customers CRM, Search Company, Company, Contact Info Click the Company link. • Customers CRM, Add Company, Company, Contact Info Click the Company link.	Access contact information for a company.

Page Name	***Definition Name***	***Navigation***	***Usage***
Partner Company- Contact Info	RD_PTNR_ADDR_BOOK	• Customers CRM, Search Partner Company, Partner Company, Contact Info, Addresses Click the Partner link. • Customers CRM, Add Partner Company, Partner Company, Contact Info, Addresses Click the Partner link.	Access contact information for a partner company.
Site - Contact Info	RD_SITE_ADDR_BOOK	• Customers CRM, Search Site, Site, Contact Info, Site Click the Site link. • Customers CRM, Add Site, Site, Contact Info, Site Click the Site link.	Access contact information for a site.
Company - Address Book Person - Address Book Partner Company - Address Book Site - Address Book	ABE_DETAIL	• Click a Description link in the Contact Info Entries grid on the Contact Info page for a company, person, partner company, or site. • Click the Create Entry button on the Contact Info page for a company, person, partner company, or site.	Maintain contact information entries for a person, company, site, or partner company.
Address Search Result List	ABE_ADD_LOOKUP_SEC	Click the Look Up Address link on the Contact Info page for a company, person, partner company, or site.	Select an existing address to use or modify as the address for a company, person, partner company, or site.

Page Name	***Definition Name***	***Navigation***	***Usage***
Company - Update Address Person - Update Address Partner Company - Update Address Site - Update Address	RD_ADDR_DETAIL	Expand the Advanced Options section on the Contact Info page for a company, person, partner company, or site. Select the Address tab. Click the Edit button next to any listed address.	Update address detail.
Company - Update Phone Person - Update Phone Partner Company - Update Phone Site - Update Phone	RD_PHONE_DETAIL	Expand the Advanced Options section on the Contact Info page for a company, person, partner company, or site. Select the Phone tab and click the Edit button next to any listed.	Update phone detail.
Company - Update Email Person - Update Email Partner Company - Update Email Site - Update Email	RD_EMAIL_DETAIL	Access the Contact Info page for a company, person, partner company, or site. Expand the Advanced Options section. Select the Email tab. Click the Edit button next to any listed email address.	Update email detail.

Accessing Contact Information

Access the Contact Info page for a company, site, partner company, or person.



Company - Contact Info page

Different links appear below the Contact Info tab, depending on the type of business object you are accessing. For companies or persons with the Consumer role, the Contacts and Sites links enable you to view and update the contact information of contacts and sites that are associated with the business object. For partner companies and sites, you can view and update the contact information of contacts that are associated with the business object. For persons with the Contact role, you can view only the contact's own contact information.

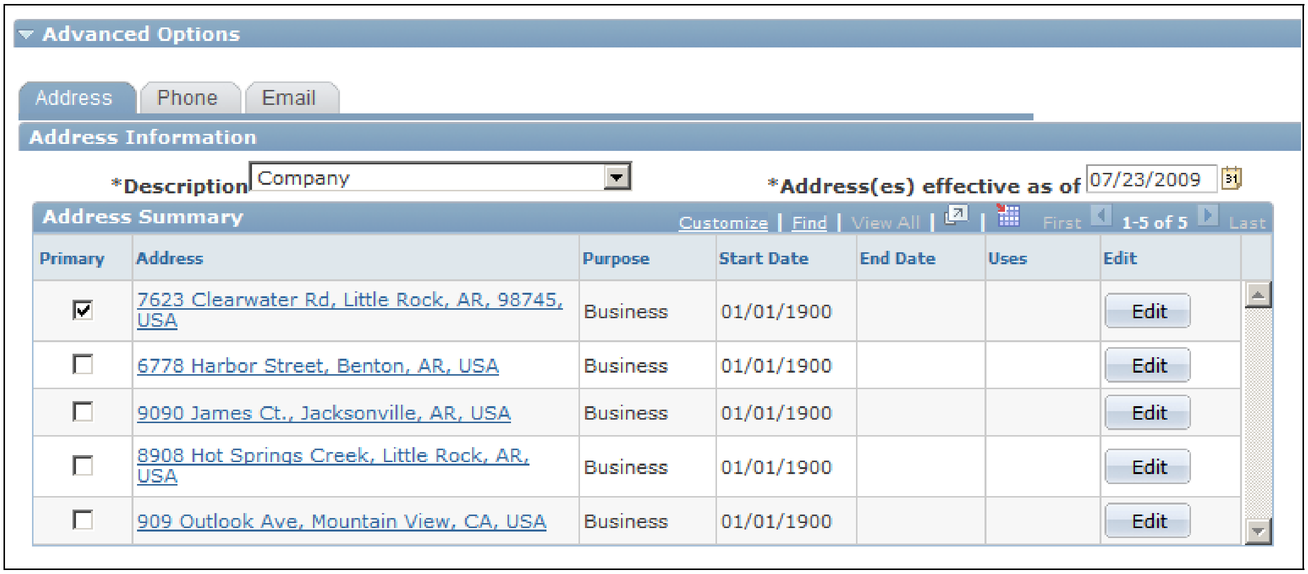
See and Chapter 3, "Defining Control Values for Business Objects," Configuring Address Books, page 34.

Contact Info Entries

Description	Click a description to edit the contact information that is in the entry.
Create Entry	Click to add a new contact information entry.

Advanced Options

Use the advanced options section to designate a contact method as primary for the business object and to edit information about the contact method.

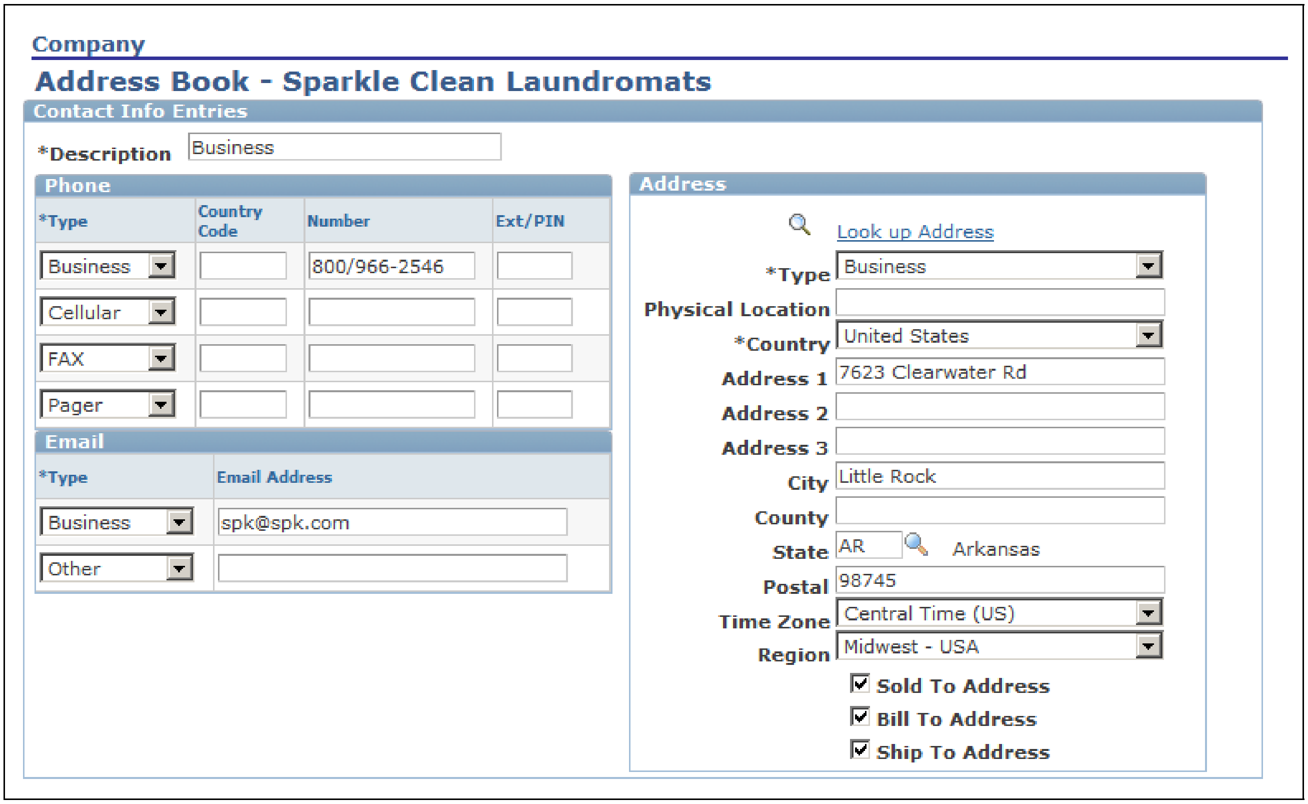


Contact Info page - Advanced Options section

Edit	Click this button to access a page where you can edit the contact method and change its start and end dates.

Maintaining Contact Information

Access the Address Book page for a company, person, partner company, or site (click a Description link in the Contact Info Entries grid on the Contact Info page for a company, person, partner company, or site).



Address Book page

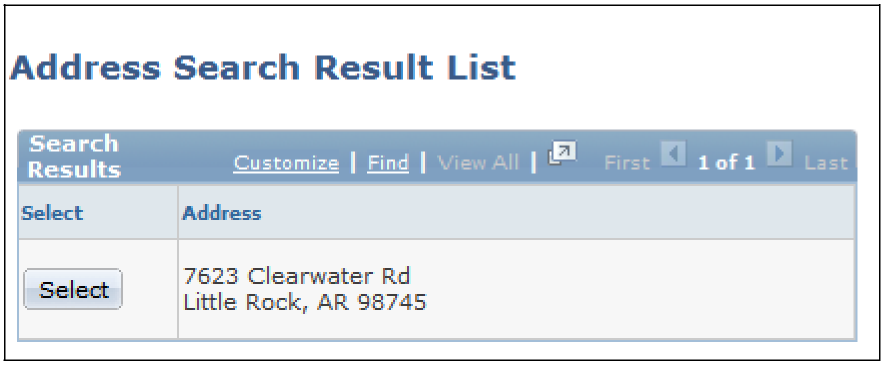
Note. *Phone*,*Email*, and *Address* are examples of *contact methods.*When you remove a contact method, its end date is set to the current date, thereby inactivating the contact method. This occurs only if the contact method is not in any other active Contact Info entry on the component. After you inactivate a contact method, the only way to reactivate it is by changing the start and end dates that are available within the Contact Info Advanced Options section.

If your CRM installation includes Order Capture, the Sold To,Bill To, and Ship To check boxes appear and you can select one or more of these options to apply to the address.

See and Chapter 5, "Defining Purchasing Options for Companies, Consumers, and Sites," page 77.

Selecting Existing Addresses

Access the Address Search Result List page for a company, person, partner company, or site (click the Look Up Address link on the Contact Info page for a company, person, partner company, or site).

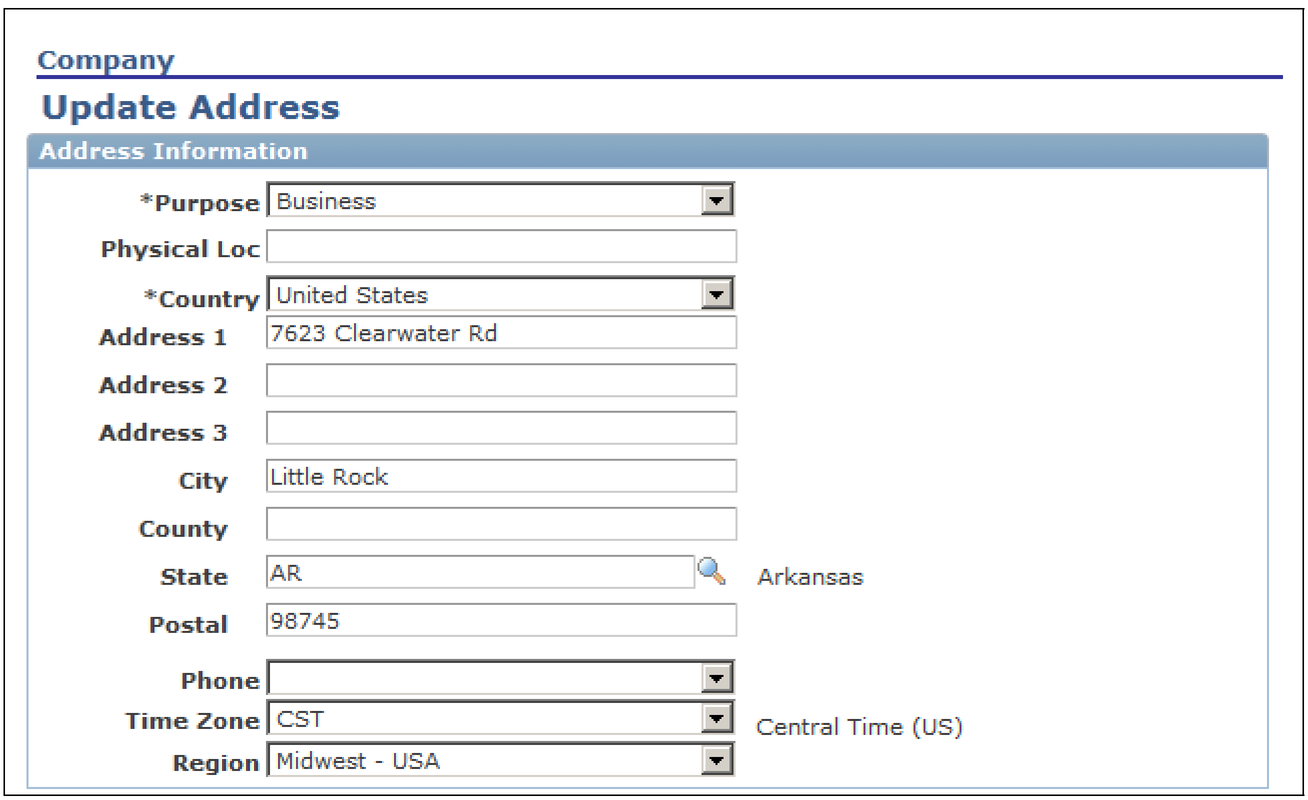


Address Search Result List page

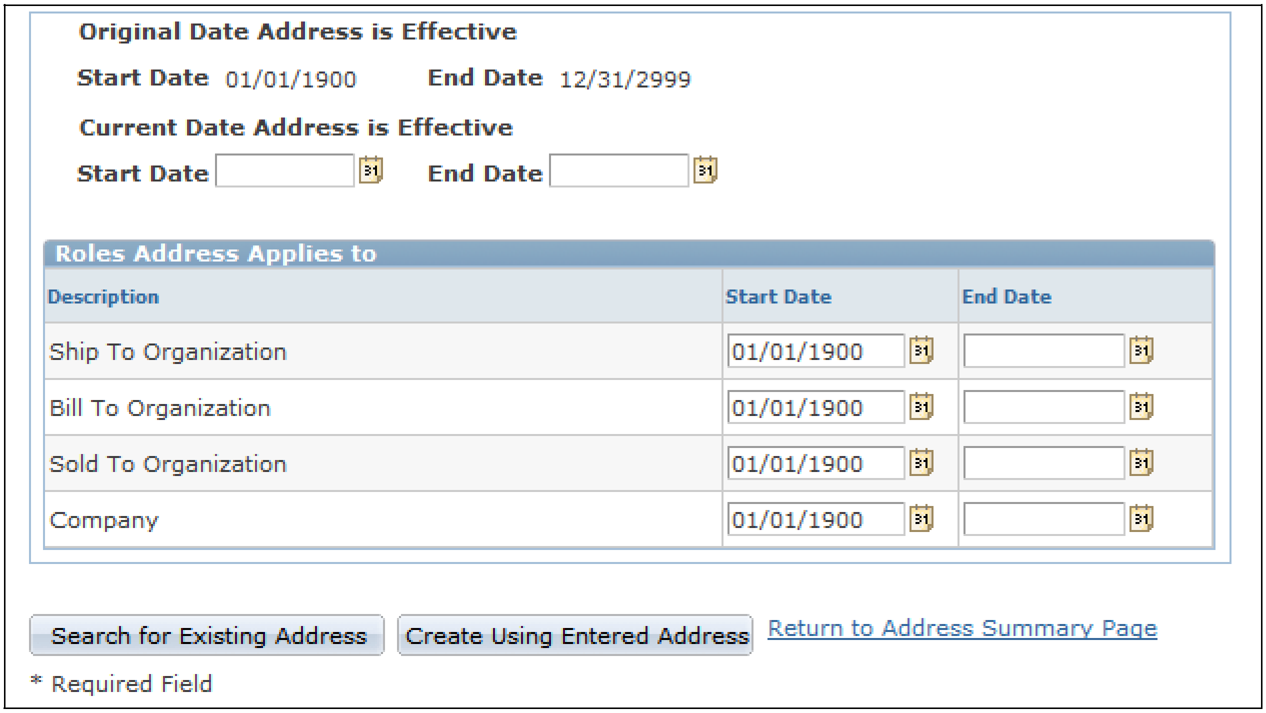
Select a listed address.

Updating Address Detail

Access the Update Address page for a company, person, partner company, or site (expand the Advanced Options section on the Contact Info page for a company, person, partner company, or site; select the Address tab; then click the Edit button next to any listed address).



Update Address page (1 of 2)



Update Address page (2 of 2)

Search for Existing Address — Click to search the existing addresses for a company. The system returns addresses that match the address information that you enter in the Address Information page region.

Create Using Entered Address — Click to create the address by using the information that you enter.

Address Effective Dates and Applications

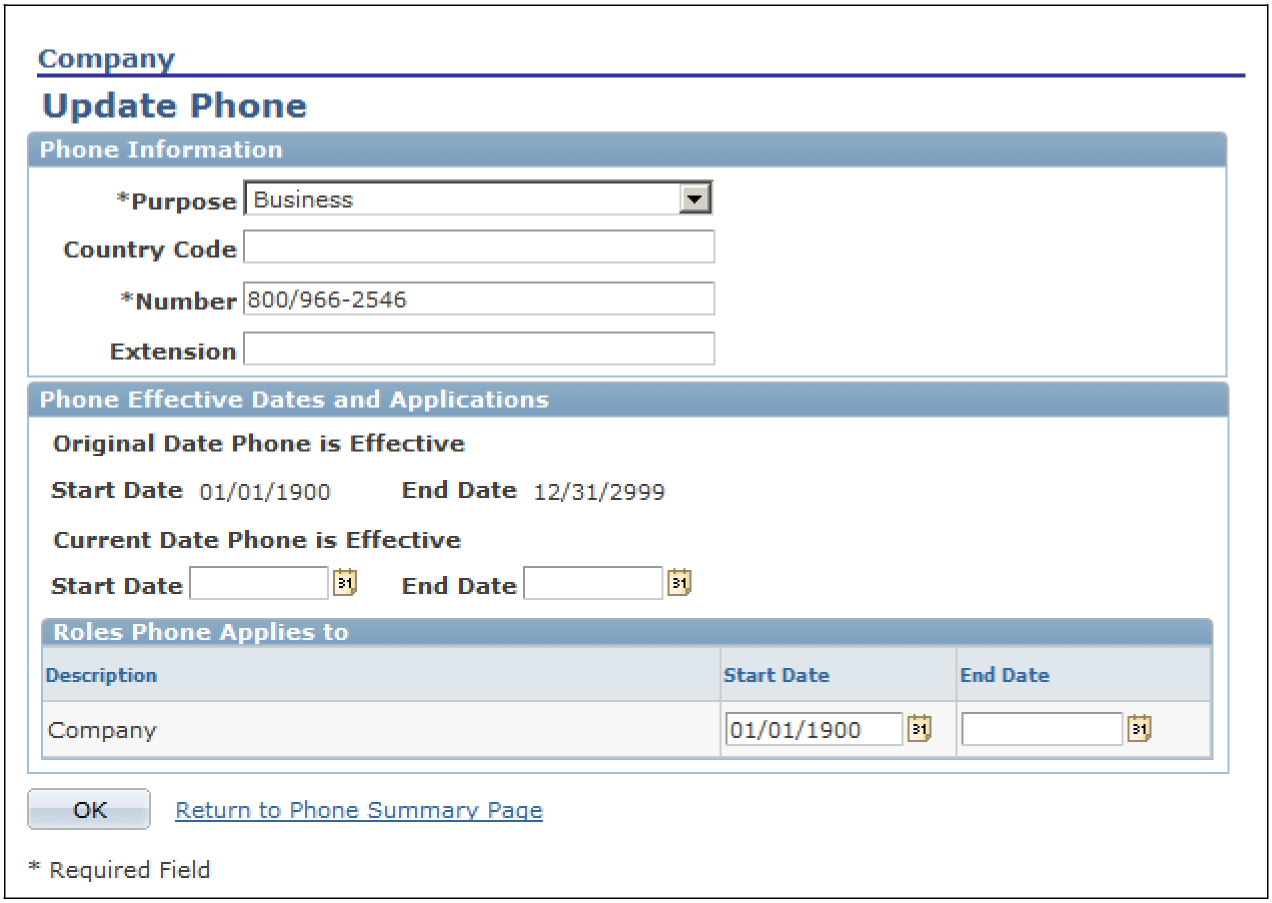
Enter the start date and end date that the address is effective.

Roles Address Applies to

This region lists all the roles that are assigned to the business object. By default, the address applies to all the business object roles. You can enter a start date and end date for each role to inactivate the address that is defined for the role.

Updating Phone Detail

Access the Update Phone page for a company, person, partner company, or site (expand the Advanced Options section on the Contact Info page for a company, person, partner company, or site; then select the Phone tab and click the Edit button next to any listed).



Update Phone page

Phone Effective Dates and Applications

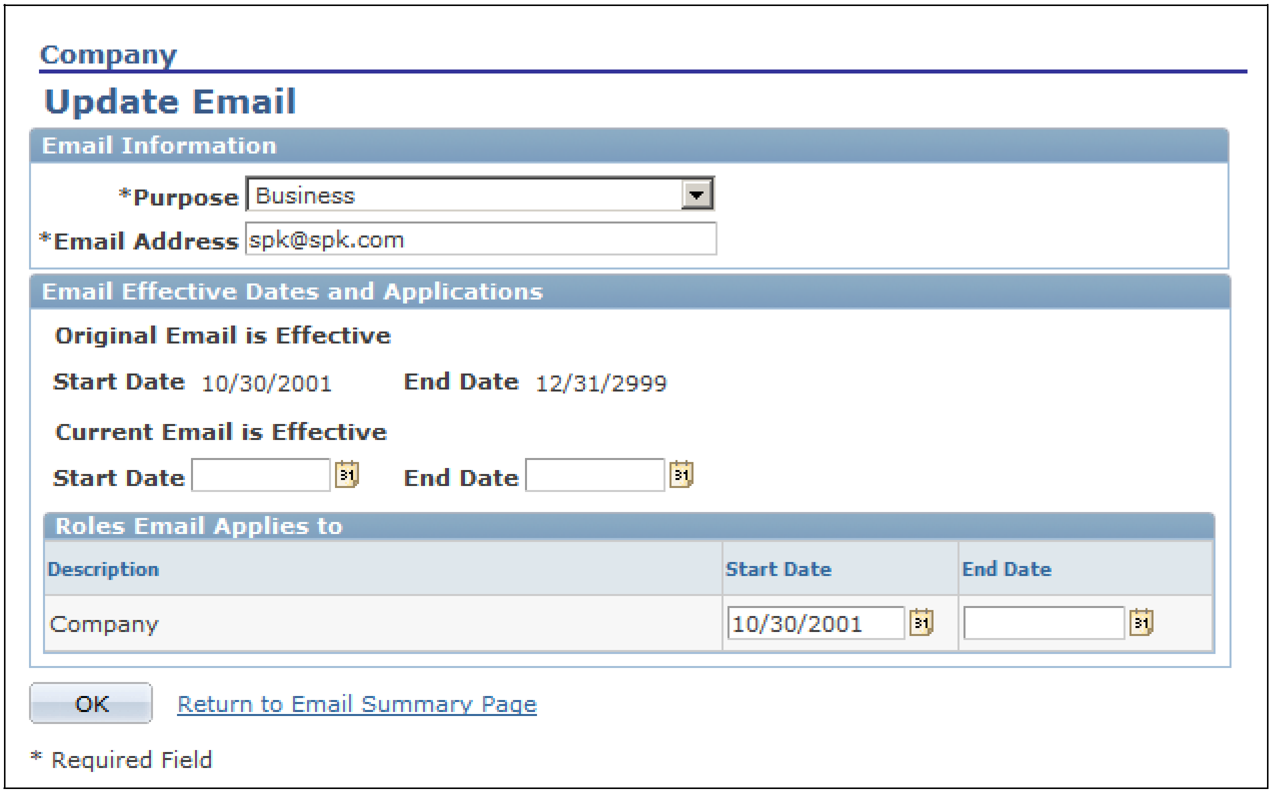
Enter the start date and end date on which the phone number is effective.

Roles Phone Applies to

This region lists all the roles that are assigned to the business object. By default, the phone number applies to all the business object roles. You can enter a start date and end date for each role to inactivate the phone for the role.

Updating Email Detail

Access the Update Email page for a company, person, partner company, or site (access the Contact Info page for a company, person, partner company, or site; expand the Advanced Options section; select the Email tab; then click the Edit button next to any listed email address).



Update Email page

Email Effective Dates and Applications

Enter the start date and end date that the email is effective.

Roles Email Applies to

This region lists all the roles that are assigned to the business object. By default, the email applies to all the business object roles. You can enter a start date and end date for each role to inactivate the email for the role.

See Also

Chapter 3, "Defining Control Values for Business Objects," Setting Up Contact Methods, page 35

Defining Customer Contacts

This section discusses how to define contacts for a customer or partner company.

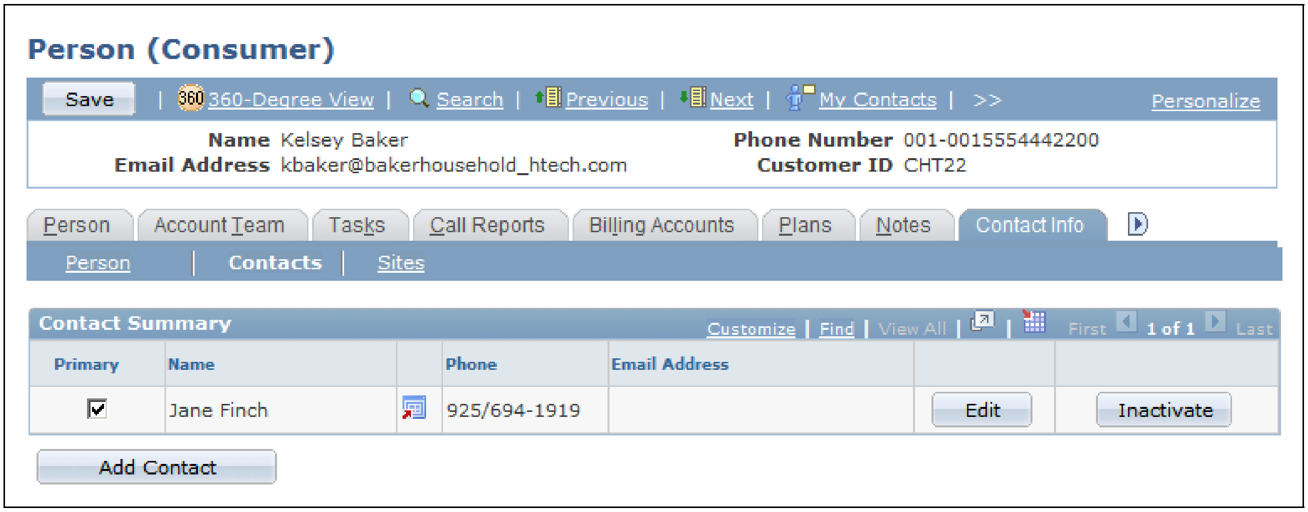
Pages Used to Define Customer Contacts

Page Name	***Definition Name***	***Navigation***	***Usage***
Person - Contacts	RD_CONSUMER_REP	• Customers CRM, Search Person, Person, Summary Click the Edit Consumer Information link or the Add Consumer Information link. Select the Contact Info tab and click the Contacts link. • Customers CRM, Add Person, Person, Details Click the Add Consumer Information link. Select the Contact Info tab and click the Contacts link.	Maintain the list of contacts for a person. **Note.** You can only define contacts for a person with the consumer role.
Company - Contacts	RD_COMPANY_CNTCT_2	• Customers CRM, Add Company, Company, Details Select the Contact Info tab. Click the Contacts link. • Customers CRM, Search Company, Company, Summary Select the Contact Info tab. Click the Contacts link.	Maintain the list of contacts that are defined for a company.

Page Name	***Definition Name***	***Navigation***	***Usage***
Partner Company - Contacts	RD_PTNR_CONTACTS	• Partners, Add Partner Company, Partner Company, Details Select the Contact Info tab. Click the Contacts link. • Partners, Search Partner Company, Partner Company, Summary Select the Contact Info tab. Click the Contacts link.	Maintain the list of contacts for a partner company.
Site - Contacts	RD_SITE_CNTCT_2	• Customers CRM, Add Site, Site, Primary Select the Contact Info tab. Click the Contacts link. • Customers CRM, Search Site, Site, Primary Select the Contact Info tab. Click the Contacts link.	Maintain the list of contacts for a site.
Create Contact of <object>	RBQ_QCREATE	Click the Create Entry button on the Contacts page for a company, consumer, partner company, or site.	Create a contact of a company, consumer, partner company, or site.
Modify <contact>	ABE_DETAIL	Click the Description link on the Contacts page for a company, consumer, partner company, or site.	Maintain contact information entries for a contact of a company, consumer, partner company, or site. This page is similar in format and usage to the Create Contact of <customer> page.

Maintaining the Contact List

Access the Contacts page for a company, partner company, site, or person with the consumer role.

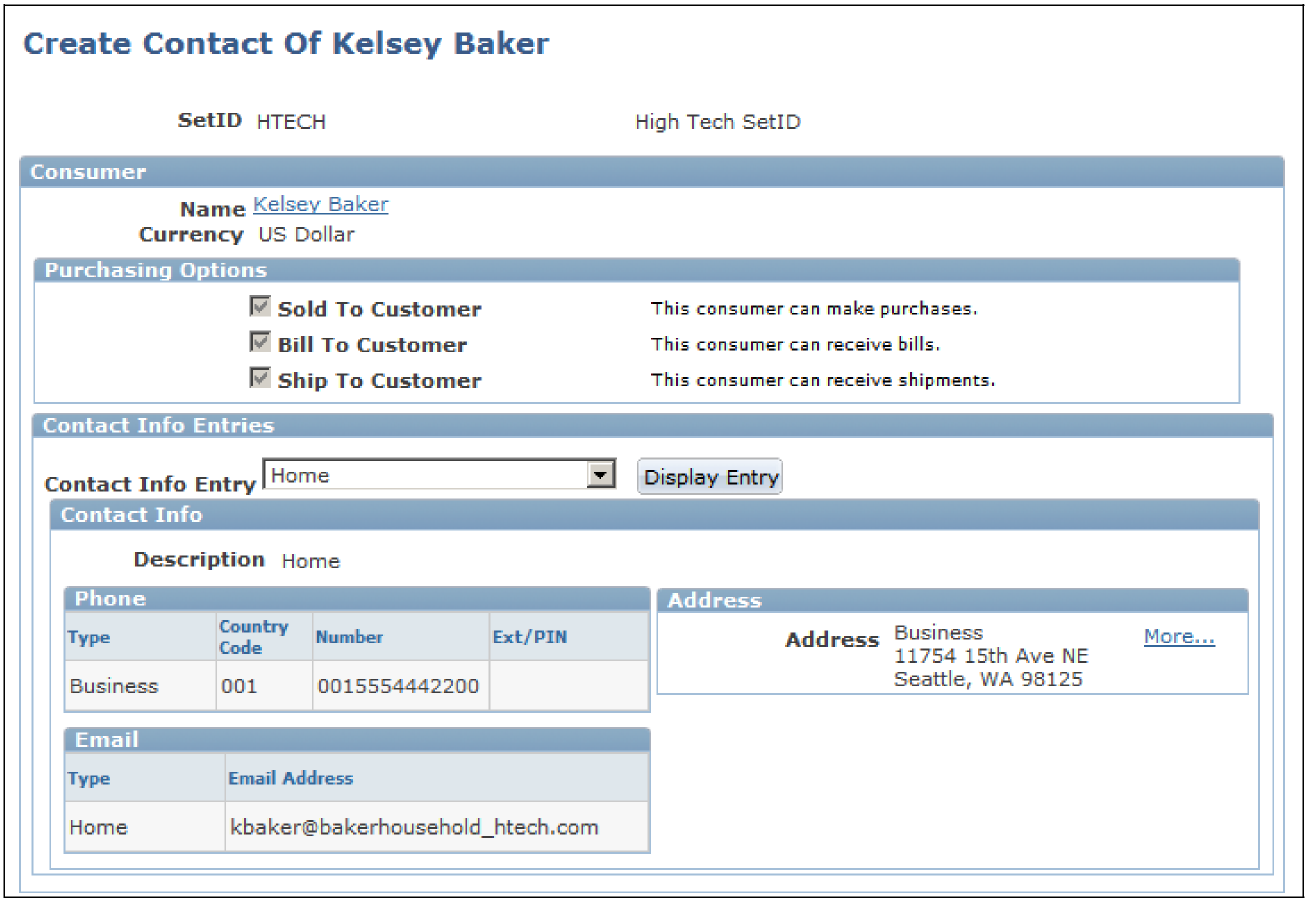


Contact Info - Contacts page

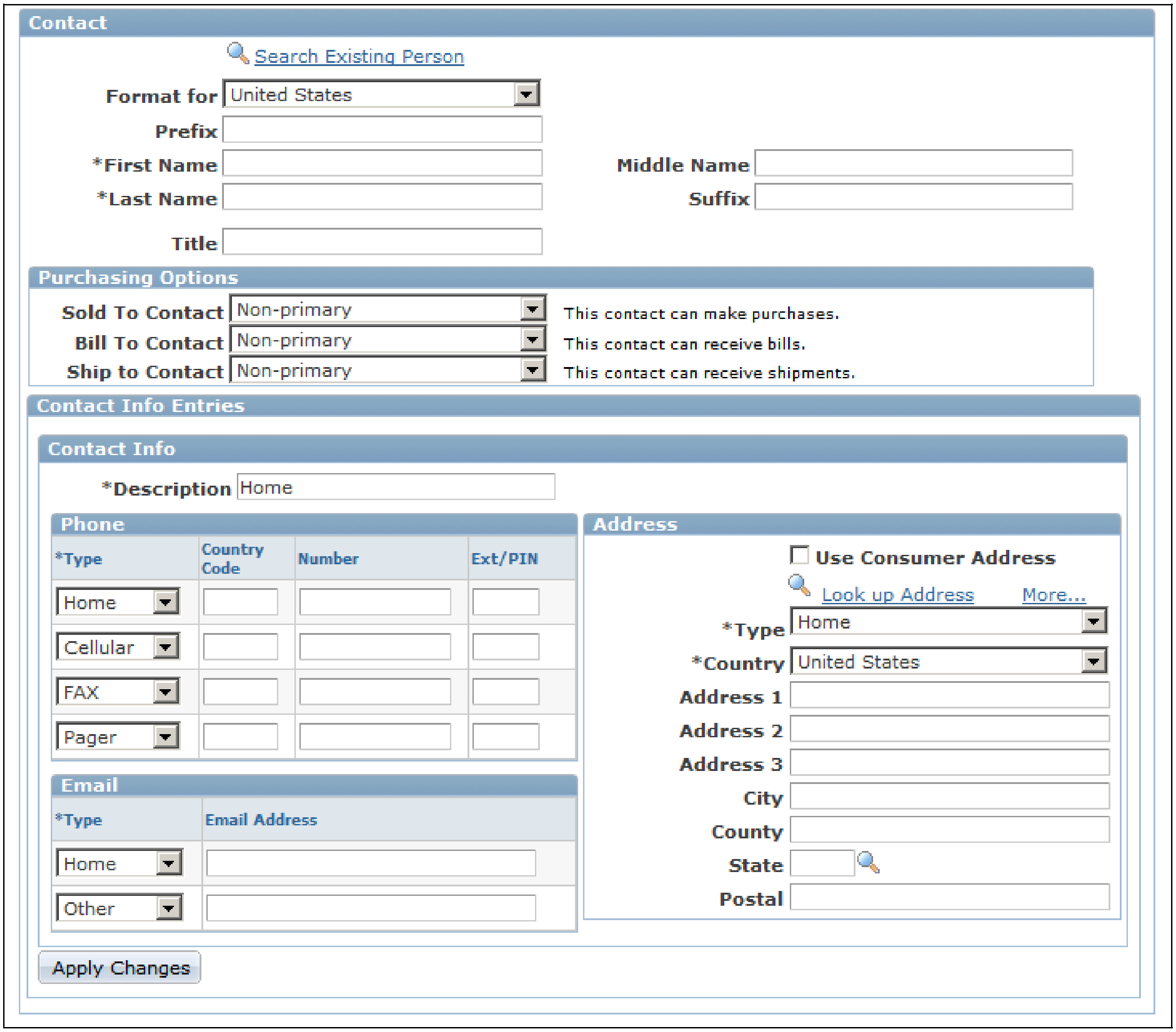
This page enables you to add contacts of a customer business object and edit or inactivate existing contacts.

Creating Contacts of Customers

Access the Create Contact of <object> page (click the Create Entry button on the Contacts page for a company, consumer, partner company, or site).



Create Contact of <customer> page (1 of 2)



Create Contact of <customer> page (2 of 2)

The first section of this page contains information about the customer, to provide context for the contact that is being added.

Contact

Enter contact information about the contact in this section.

Purchasing options appear after you create or update a contact only if option is enabled on the parent component's primary page. The contact must have at least one address defined before you can select purchasing options.

Sold To Contact, **Bill To Contact**, and **Ship To Contact**	Select whether the contact is primary or non primary for each purchasing option that appears. The available purchasing options are inherited from the customer's purchasing options. If you do not select a value for the purchasing option, the contact is not enabled for that option.

Search Existing Person Click to search the database for a person whose information matches the information that you enter on this page. A page appears on which you can select a person to add as a contact.

Use <customer> Address Select to use the customer's address for the contact.

See Also

Chapter 11, "Defining Person Business Objects," Defining Information for Business Contacts, page 184

Defining Customer Sites

This section lists the pages used to maintain site lists.

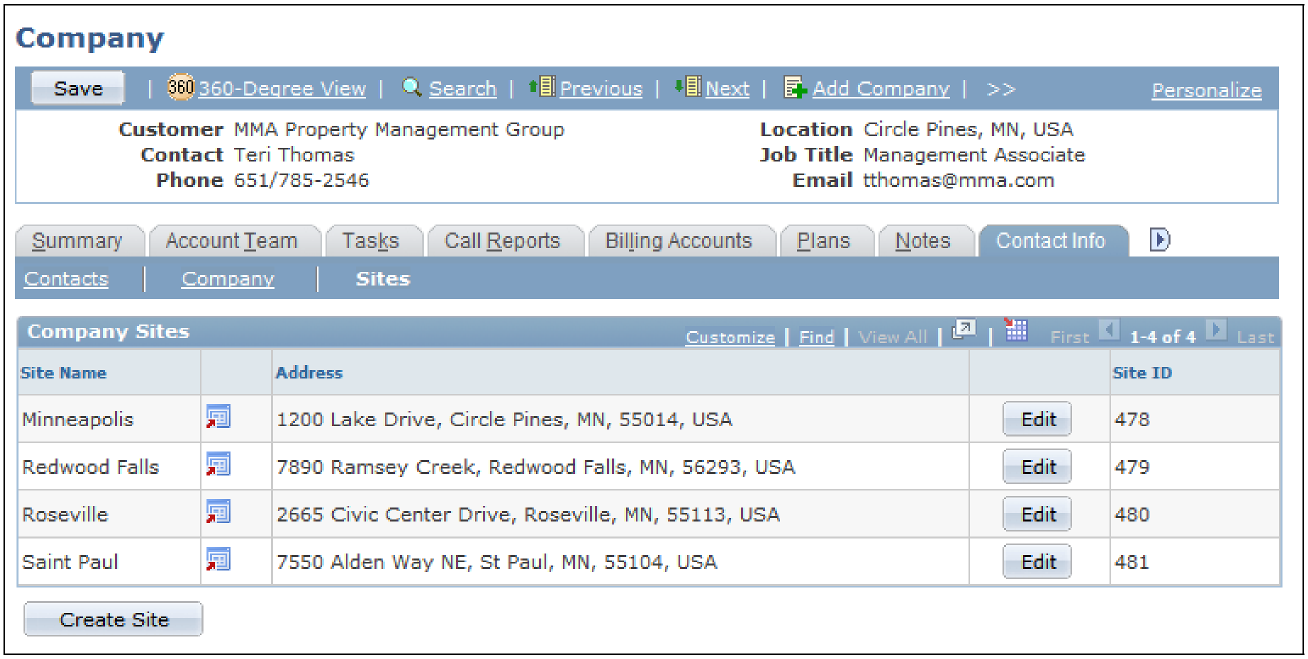
Pages Used to Define Sites

Page Name	*Definition Name*	*Navigation*	*Usage*
Company - Sites	RD_COMPANY_SITE_2	• Customers CRM, Add Company, Company, Contact Info Click the Sites link. • Customers CRM, Search Company, Company, Contact Info Click the Sites link.	Maintain company sites.

Page Name	***Definition Name***	***Navigation***	***Usage***
Person - Sites	RD_CONSUMER_SITE_2	• Customers CRM, Add Person, Person, Details Click the Add Consumer Information link. Select the Contact Info tab and click the Sites link. • Customers CRM, Search Person, Person, Summary Click the Edit Consumer Information link or the Add Consumer Information link. Select the Contact Info tab and click the Sites link.	Maintain sites for a person. **Note.** You can only maintain sites for a person with the consumer role.
Create Site of <customer>	RBQ_QCREATE	Click the Create Site button on the Sites page for a company or person who has the consumer role.	Add a site to a company or person. This page is similar in usage to the Create Contact of <customer> page.
Modify <site>	RBQ_QCREATE	Click the Edit button next to a listed site on the Sites page for a company or person who has the consumer role.	Maintain contact information and purchasing options for a customer site.
Merge Request for Sites	RBQ_QCREATE	Click the Select Sites for Merge Request button on the Contact Info: Sites page for a company or a person with the Consumer role.	Submit two or more sites for merge evaluation.

Maintaining Site Lists

Access the Company - Sites page (Customers CRM, Add Company, Company, Contact Info; click the Sites link).



Company Sites page

View and edit the list of sites that are defined for the customer or click the Create Site button to create a new site.

Chapter 5

Defining Purchasing Options for Companies, Consumers, and Sites

This chapter provides an overview of purchasing options and discusses how to:

- Define purchasing options for customers.
- Select purchasing options for customer addresses.
- Select purchasing options for customer contacts.
- Select purchasing options for customer sites.

Understanding Purchasing Options

If you have installed PeopleSoft Order Capture, you can designate purchasing options for customer companies, consumers, or sites. Purchasing options in PeopleSoft Customer Relationship Management (PeopleSoft CRM) control whether a customer can make purchases (sold-to), receive shipments (ship-to), or receive invoices (bill-to).

Defining purchasing options is a two-step process. First, you enable purchasing options for the customer. You then select the purchasing options that apply to each contact that you define for a company, consumer, or site and for each site that you define for a company or consumer.

If a company, consumer, or site is defined as a sold-to customer, you can define related customers to receive the bills or shipments. Defining related customers manages those situations for which a company's purchasing and payment processing are done centrally, but the ordered products are typically shipped to other corporate sites.

Purchasing Option Integrations

Other systems, including PeopleSoft Financial Management Solutions, PeopleSoft Supply Chain Management, and third-party systems, capture and use purchasing information. You can use enterprise integration points (EIPs) to synchronize purchasing option information with these systems.

Sites that are flagged as bill-to or sold-to in PeopleSoft CRM are integrated in PeopleSoft Supply Chain Management as customers. PeopleSoft CRM ship-to sites are integrated in PeopleSoft Supply Chain Management as addresses of sites with which the site is currently associated.

PeopleSoft Financial Management Solutions and PeopleSoft Supply Chain Management also enable you to define additional attributes and processing options and to view the updated information in PeopleSoft CRM.

See Also

Chapter 9, "Defining Company Business Objects," page 137

Chapter 10, "Defining Site Business Objects," page 155

Chapter 11, "Defining Person Business Objects," page 167

Chapter 12, "Defining Workers," page 191

Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," page 343

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Defining Purchasing Options for Customers

This section discusses how to define purchasing options.

Pages Used to Define Purchasing Options for Customers

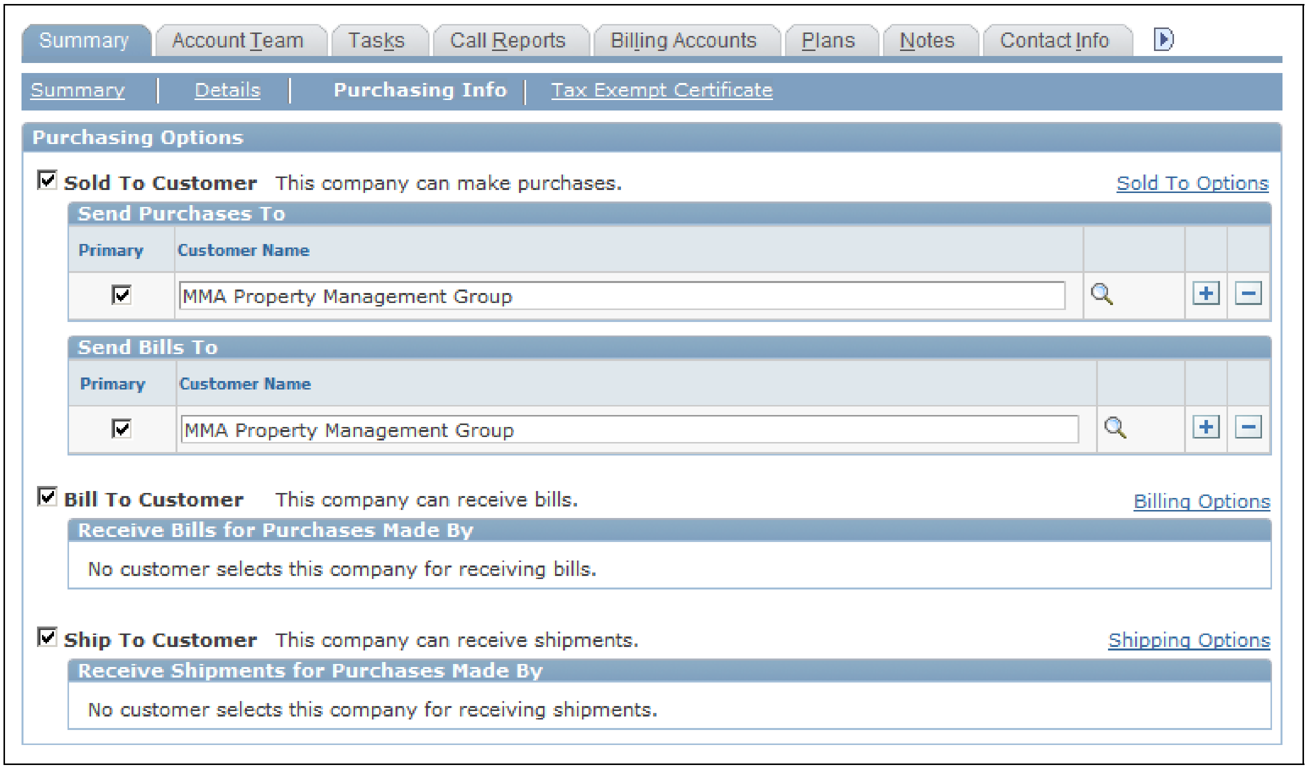
Page Name	***Definition Name***	***Navigation***	***Usage***
Company - Details	RD_COMPANY_DETAILS	• Customers CRM, Search Company, Company Click the Details link. • Customers CRM, Add Company, Company	Select purchasing options for the company.
Company - Purchasing	RD_COMPANY_CUST_OP	• Customers CRM, Search Company, Company Click the Purchasing Info link. • Customers CRM, Add Company, Company Click the Purchasing Info link.	Enter purchasing option details for the company.

Page Name	***Definition Name***	***Navigation***	***Usage***
Site - Details	RD_SITE_MAIN_2	• Customers CRM, Search Site, Site Click the Details link. • Customers CRM, Add Site, Site	Select purchasing options for the site.
Site - Purchasing	RD_SITE_CUST_OP_2	• Customers CRM, Search Site, Site Click the Purchasing Info link. • Customers CRM, Add Site, Site Click the Purchasing Info link	Enter purchasing option details for the site.
Person - Details	RD_CONSUMER_BC_OPT	• Customers CRM, Search Person, Add Person Click the Add Consumer Information link. • Customers CRM, Search Person, Person If the information that appears is for the Contact role, click the Edit Consumer Information or Add Consumer Information link. Click the Details link.	Enable purchasing options for the selected consumer. **Note.** Purchasing options for Persons are available only for a person with the Consumer role.
Person - Purchasing	RD_CONSUMER_BC_OPT	Click the Purchasing Info link on the Person page for a person with the Consumer role.	Enable purchasing options for the selected consumer. **Note.** Purchasing options for Persons are available only for a person with the Consumer role.

Entering Purchasing Detail

Access the Purchasing Info page (Customers CRM, Search Company, Company - Summary: Purchasing Info).

Note. The example shown is from the Company component. The Purchasing Info pages for the Consumer and Site components offer similar functionality.



Company - Purchasing Info page

Sold To Customer

Indicates that the customer or customer site can purchase products or services. If you select this option, you can designate other customers or customer sites to receive invoices and shipments for the purchases that this customer makes.

Bill To Customer

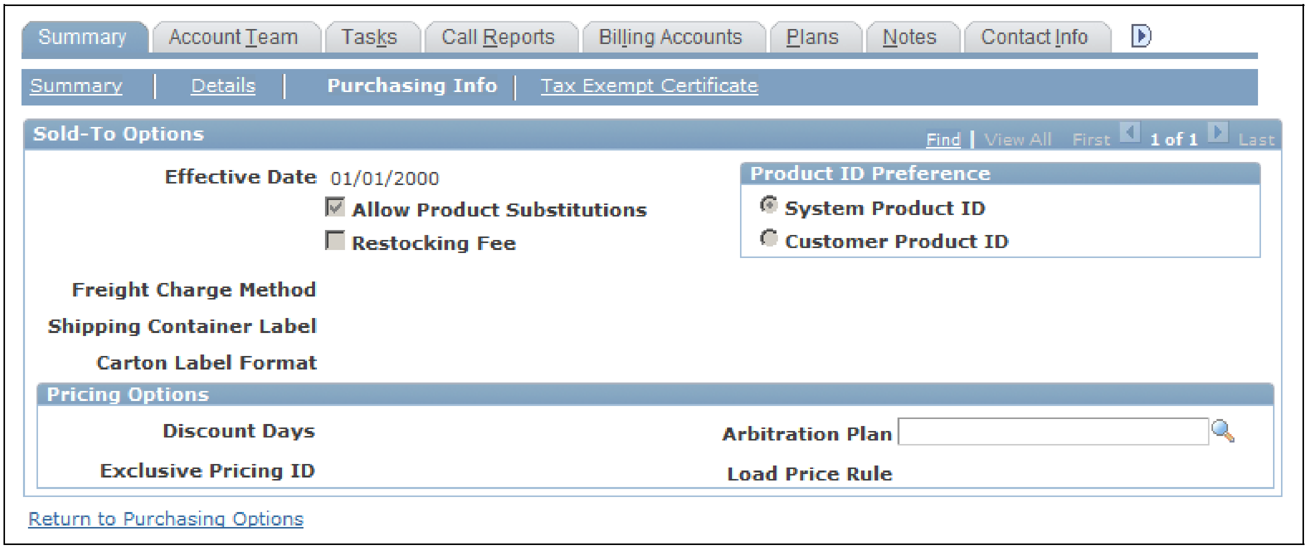
Indicates that the customer or customer site can receive invoices for purchases. If you select this option, you can designate other customers or customer sites for which the customer receives invoices.

Ship To Customer

Indicates that the customer or customer site can receive shipments for products or services. If you select this option, you can designate other customers or customer sites as purchasers of the products or services that this site receives.

Sold-To Options

Click the Sold-To Options link.



Purchasing Info: Sold-To Options page

This view displays sold-to options that are established in PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management.

Shipping Options

Click the Shipping Options link.

This view displays ship-to options that are established in PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management.

Billing Options

Click the Billing Options link.

This view displays bill-to options that are established in PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management. You can enter values for the following fields in PeopleSoft CRM.

Credit Analyst	Select the code for the credit analyst who works with the customer. This field is required for successful integration with Financial Management Solutions or Supply Chain Management. See and Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," Creating and Maintaining Credit Analyst Codes, page 369.

Collector

Select the code for the collector who works with the customer. This field is required for successful integration with Financial Management Solutions or Supply Chain Management. Collector codes are established on the Collector page under Set Up CRM, Common Definitions, Customer. Default EIP collector code values are specified on the Interface Defaults page under Set Up CRM, Common Definitions, Integration Rules, Integration Defaults.

Note. You must manually synchronize credit analyst and collector codes among CRM, Financial Management Solutions, and Supply Chain Management to ensure successful integration with these systems. Customer EIP application messages will fail if they include codes that are not available in the subscribing system.

Payment Terms Code

Enter the payment terms for informational purposes.

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

Important! Perform updates to the customer's bill-to options, including changes to the credit analyst or collector codes, in the Financial Management Solutions or Supply Chain Management systems.

Selecting Purchasing Options for Customer Addresses

This section discusses how to select purchasing options for addresses.

Pages Used to Select Purchasing Options for Customer Addresses

Page Name	*Definition Name*	*Navigation*	*Usage*
Contact Info	ABE_DETAIL	• Customers CRM, Search Company, Company, Contact Info Click the Addresses link. Click a Description link. • Customers CRM, Search Site, Site, Contact Info Click the Addresses link. Click a Description link. • Customers CRM, Search Person, Person, Summary Click the Add Consumer Information link. Select the Contact Info tab. Click the Addresses link. Click a Description link.	Select purchasing options that apply to an address of a company, site, or person. **Note.** Purchasing options are available from the Person component only if the person has the Consumer role.

Selecting Purchasing Options for Addresses

Access the Contact Info page for a company, site, or consumer.

See and Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Contact Information for Business Objects, page 58.

Selecting Purchasing Options for Customer Contacts

This section discusses how to define purchasing options for customer contacts.

Pages Used to Select Purchasing Options for Customer Contacts

Page Name	***Definition Name***	***Navigation***	***Usage***
Person - Contacts	RD_CONSUMER_REP	• Select the Contact Info tab on the Person component for a person who has the Consumer role. Click the Contacts link. • Customers CRM, Add Person, Person, Primary Click the Add Consumer Information link. Select the Address Book tab. Click the Contacts link.	Maintain the list of contacts for a person. **Note.** You can only define contacts for a person with the Consumer role.
Company - Contacts	RD_COMPANY_CNTCT_2	• Customers CRM, Add Company, Company, Contact Info Click the Contacts link. • Customers CRM, Search Company, Company, Contact Info Click the Contacts link.	Maintain the list of contacts for a company.
Site - Contacts	RD_SITE_CNTCT_2	• Customers CRM, Add Site, Site, Contact Info Click the Contacts link. • Customers CRM, Search Site, Site, Contact Info Click the Contacts link.	Maintain the list of contacts for a site.
Contact Info	ABE_DETAIL	Click the Add Contact button next to a listed contact on the Contacts page for a company, site, or person with the Consumer role.	Select purchasing options that apply to an address of a company, site, or person.

Page Name	Definition Name	Navigation	Usage
Maintain Contact	RBQ_QCREATE	Click the Edit Contact button next to a listed contact on the Contacts page for a company, site, or person with the consumer role.	Maintain purchasing options for a contact. Designate a contact as primary for a purchasing option.

Selecting Purchasing Options for Customer Contacts

Access the Contact Info page for a customer contact.

See and Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Contact Information for Business Objects, page 58.

Maintaining Purchasing Options for Customer Contacts

Access the Maintain Contact page for a customer contact.

See and Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Contacts, page 67.

Selecting Purchasing Options for Customer Sites

This section discusses how to define purchasing options for customer sites.

See Also

Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Sites, page 73

Pages Used to Select Purchasing Options for Customer Sites

Page Name	Definition Name	Navigation	Usage
Company - Sites	RD_COMPANY_SITE_2	• Customers CRM, Add Company, Contact Info Click the Sites link. • Customers CRM, Search Company, Contact Info Click the Sites link.	Maintain company sites.

Page Name	***Definition Name***	***Navigation***	***Usage***
Person - Sites	RD_CONSUMER_SITE_2	• Customers CRM, Add Person, Details Click the Add Consumer Information link. Select the Contact Info tab and click the Sites link. • Customers CRM, Search Person, Summary Click the Edit Consumer Information link or the Add Consumer Information link. Select the Contact Info tab and click the Sites link.	Maintain sites for a person. **Note.** You can only maintain sites for a person with the Consumer role.
Company - Edit Site Person - Edit Site	RD_CUST_SITE_DTL	Click the Edit button next to any listed site on the Sites page for a company or consumer.	Select purchasing options for a customer site. **Note.** Purchasing options are available from the Person component only if the person has the Consumer role.
Company - Create Site Person - Create Site	RD_CUST_SITE_DTL	Click the Create Site button on the Sites page for a company or person who has the Consumer role.	Select purchasing options for a customer site.

Defining Purchasing Options for Customer Sites

Access the Contact Info page for a customer site.

See and Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Sites, page 73.

Chapter 6

Defining Tax Exempt Certificate Information for Companies, Consumers and Sites

This chapter provides an overview of Tax Exempt Certificates and discusses how to work with Tax Exempt Certificate information.

Understanding Tax Exempt Certificates

Various types of organizations are exempt from paying sales tax, state hotel occupancy tax and, if incorporated, franchise tax. The exemptions vary, depending upon the type of organization. Organizations include charitable, educational, and religious.

Government entities are frequently asked to provide a tax-exempt number or *determination* letter to prove status as a tax-exempt or charitable entity. For example, applications for grants from a private foundation or a charitable organization generally require this information as part of the application process. In addition, donors frequently ask for this information as substantiation that the donor's contribution is tax deductible, and vendors may ask for this to substantiate that the organization is exempt from sales or excise taxes.

Note. Exemption from sales taxes is made under state, not Federal, law.

Tax exemption details are displayed and maintained on the Company, Consumer, and Site components. Updates to the Tax Exempt Certificate information is published to Supply Chain Management.

Tax exempt information created in PeopleSoft CRM can be viewed and edited in PeopleSoft SCM and tax exempt information created in PeopleSoft CRM can be viewed and edited in PeopleSoft SCM.

Working with Tax Exempt Certificate Information

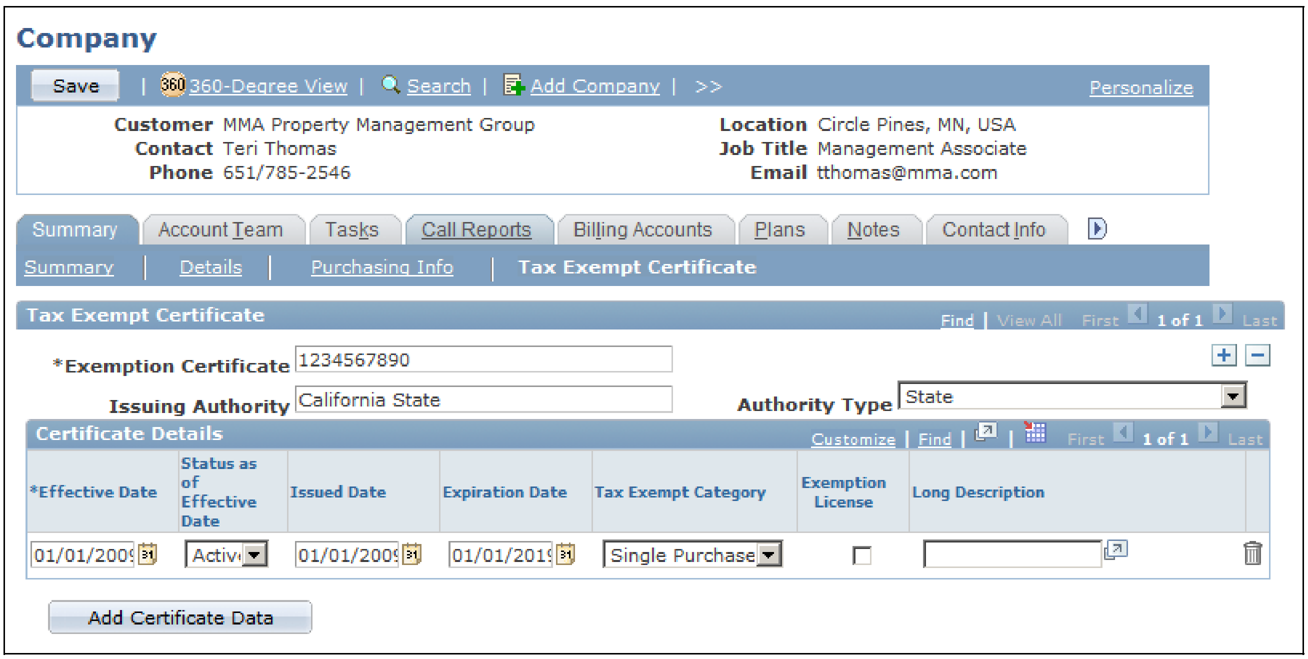
This section discusses how to enter and maintain Tax Exempt Certificate information.

Page Used to Work with Tax Exempt Certificate Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Tax Exempt Certificate	RD_TAX_EXEMPT_COMP	Click the Tax Exempt Certificate link on the Company - Summary page. Click the Tax Exempt Certificate link on the Consumer - Summary page. Click the Tax Exempt Certificate link on the Site - Summary page.	Add, delete, or modify Tax Exempt Certificate information.

Working with Tax Exempt Certificate Information

Access the Tax Exempt Certificate page (click the Tax Exempt Certificate link on the Company - Summary page, on the Consumer - Summary page, or on the Site - Summary page).



Tax Exempt Certificate page

Exemption Certificate and **Issuing Authority**

Record multiple tax exemption certificates for each customer and select an authority type to classify the issuing authority. For each exemption certificate, enter an effective date, status, issued date, and expiration date.

Tax Exempt Category	Specify the exemption category for which the customer qualifies with this purchase: • *Blanket*: Exemption category exists for all purchases of this type. • *Single Purchase*: Exemption category exists for the specified purchase only. • *Other*: You've defined another exemption category.
Exempt License	Select the check box to denote that a tax-exempt license is issued to the customer.

Chapter 7

Working with Business Object Profiles

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

- Specify a profile prefix.
- Create a profile request.
- Register a profile.
- Set up profile groups.
- View and update profile data.
- Insert and update rows in profiles.

Understanding Profiles

A profile is a PeopleSoft Customer Relationship Management (CRM) business tool with multiple uses. Profiles reference data to and from the Customer Data Model (CDM), transactional tables, or user defined profile tables. Use profiles to:

- Define target audiences for use in marketing activities.
- Create questions in PeopleSoft Online Marketing web-based documents.
- Merge stored profile attribute values into PeopleSoft Online Marketing email or web-based documents.
- Bring data from external sources into the CDM using Customer Relationship Management Data Import.
- Create CDM attributes that are viewable and editable in CDM components.
- Enable analysis of profile data using Marketing Insight (requires modification of ETL maps).

System and User-Defined Profile Data

Customer Relationship Management uses the Customer Data Model as a centralized data storage repository to retain extensive individual and organization information. To maximize system performance, PeopleSoft Marketing and Online Marketing use a subset of the CDM data that is stored in a set of three basic data tables. When additional individual or organization information is needed but not contained in the delivered data tables, PeopleSoft Marketing enables you to define new profiles and profile fields in the language that you want. A system administrator uses PeopleSoft Application Designer to create the corresponding physical tables and fields and then maps them to the requested definitions. Whether data resides in the predefined system tables or your user-defined profile tables, You can use it for all functions by using one or more profiles.

PeopleSoft CRM delivers two profiles with the system, one for individuals and one for organizations. The two delivered profiles are listed with the profile name People under the type Individual and Companies under the type Organization. The Individual: People and Organization: Company profiles cover profile needs related to basic contact data (for example, name, address, company name, and so on). Additionally, each user-defined profile table has a corresponding profile to reference the data that is stored there. Use profiles in combination to access information in any or all tables.

Note. When moving profiles between environments, you should always manually re-create them. Moving profiles using Data Mover is not supported.

Profile Usage

Consider these examples of the various ways to use profiles.

Suppose that your company operates a national chain of pet supply stores and that you are part of the team charged with making your marketing efforts more effective. Your team believes that one way to accomplish this is by targeting current and potential customers with promotions that are specific to the pets they own, and you decide to test it with an online marketing campaign. As part of the campaign, you purchase a list of subscribers to various pet magazines. Using your Individual: People profile, import the subscriber list into your Customer Relationship Management database.

Using your Individual: People profile, you can create a target audience of customers who have an email address on record. Use PeopleSoft Online Marketing to create an online dialog and send that target audience an email broadcast offer. The email directs respondents to a PeopleSoft Online Marketing web page that offers a free gift for each pet in the household. To receive the gift, respondents must enter or update information about each pet.

A few months ago, your company started gathering data on customers' pets. At that time, a user-defined profile was created to store several pieces of information. The web page to which you directed the respondents was created in PeopleSoft Online Marketing using your individual: people and pet profiles. As you created the page, you used several of the profile fields to display questions. As respondents answer the questions, the respondent's profile data is updated in the Customer Relationship Management database in real time.

When the information gathering phase of the dialog is complete, you launch another follow-up email that is targeted to the respondents. This time, you use the individual people and pet profiles to tailor email messages and promotions. While viewing the types of information that are gathered by these profiles, you see that you can differentiate customers by the type of pet they own. Using the Pet type as a search criteria, you create separate emailing lists for Cat, Dog, Rodent, Horse, and Bird. When the results are in, you find that this personalized, targeted approach is far more effective than other marketing efforts and you decide to expand it to your entire customer base.

Note. The People profile is a system profile. While you can make changes to it (for example, changing existing fields or adding new ones), this activity is considered customization.

Profiles and Marketing Center Security

If you have enabled Marketing Center Security, when you create a profile you can designate it as secure. When performing a search for profiles, only those secured profiles that a user has permission to access (that is, that they are authorized for at least one of the Marketing Centers associated with the profile) will be displayed as part of the search results. Profile definition functionality for documents and audiences will only display profiles that the user is authorized to access.

Note. Only custom profiles (that is, not AAF based profiles such as Case History and so forth) will be available for security. The People profile, because it should always be available for all users, cannot be secured.

See Also

PeopleSoft Online Marketing 9.1 PeopleBook, "PeopleSoft Online Marketing User Guide"

PeopleSoft CRM 9.1 Marketing Applications PeopleBook, "Oracle's PeopleSoft CRM Marketing Applications Preface"

PeopleSoft Enterprise EPM 9.1 CRM Warehouse PeopleBook

Chapter 18, "Importing Data into PeopleSoft CRM," page 381

Profile Data in the CDM

PeopleSoft CRM Online Marketing enables marketers to define profiles and profile fields that collect customer profile information, online, such as color or brand preference. After the marketers register and activate profiles and profile fields, you can configure profile groups that enable CDM components to access profile data. You can also set up the configurable search to use profile fields as search criteria.

To configure profile data for displaying and updating in CDM components, define a profile group that includes the profile fields and attach the profile group to CDM components. You can also use the Active Analytics Framework (AAF) to define conditions under which the profile data appears.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework."

The More Info page of the Company, Partner Company, and Person components enables you to view and update profile information. Read-only profile data appears on the Summary page of the Company and Partner Company components.

Note. You can specify that the profile group data appears as read-only on the More Info page.

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Configuring Search Pages"

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

Common Elements Used in this Chapter

This section lists common elements used in this chapter and discusses profile data in the customer data model (CDM).

Profile Field

A specific bit of information that is captured about the customer. For example, contact lens customers of an optical supply seller might have profile fields for the preferred color, preferred type (extended wear or daily wear), brand preference, optometrist, prescription, date of last purchase, and care kit provided. Profile fields are keyed by BO_ID.

Profile Group

An arbitrary collection of profile fields for display purposes. For example, the optical supply seller might have a profile group for contact lens information, eyeglass information, and sunglass information.

Condition

Information that controls when the profile group is displayed. After you set up profile groups, you can define the conditions for displaying and updating a profile group in a component. A read-only profile summary appears on the primary page for every component that meets the conditions, and a profile information page for updating profiles is added to the component.

For example, the condition for displaying the Contact Lens Info profile group in the Consumer component is that the consumer either previously purchased contact lenses or has requested contact lens information.

Specifying a Profile Prefix

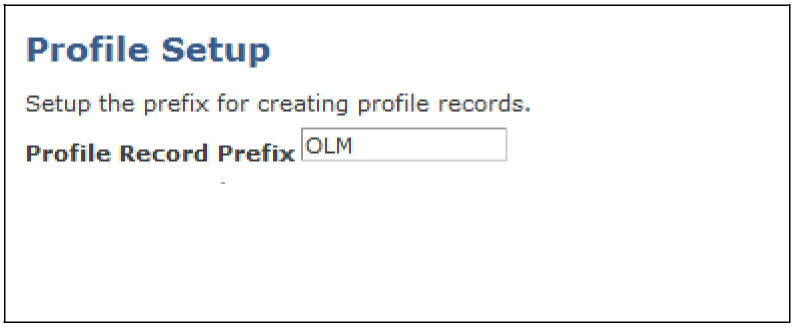
This section discusses how to specify a profile prefix.

Page Used to Specify a Profile Prefix

Page Name	*Definition Name*	*Navigation*	*Usage*
Profile Setup	RA_PROFILE_SETUP	Set Up CRM, Common Definitions, Profile Management, Profile Setup	Specify a profile record prefix for manually mapped user-defined profile records (tables).

Specifying a Profile Record Prefix

Access the Profile Setup page (Set Up CRM, Common Definitions, Profile Management, Profile Setup).



Profile Setup page

Designate a profile record prefix to use with user-defined profile records (tables). The prefix must follow the standard PeopleSoft record prefix standards. Only tables with the profile record prefix are available on the Profile Registration page.

Creating a Profile Request

This section provides an overview of profile requests and discusses how to:

- Define basic profile information.
- Add and edit profile fields.
- Define field detail.
- Modify active profiles.

Understanding Profile Requests

A profile request consists of instructions that you or a system administrator use to create a new database table and fields. Your request conveys the type of information that you need and how to use it. The profile is not available for use until you register and activate it. To assist with the communication process of marketer's requests and fulfillment or rejection of those requests by the system administrator, workflow is delivered. Marketing analysts can request profiles, and when they are set to a status of *Requested*, the person in the defined role of Dialog Administrator receives a worklist notification. When the request is either completed and activated, or rejected, the marketing administrator receives a worklist notification.

Creation of profiles should always follow thoughtful design of campaign objectives and strategy. Before beginning to define a profile request, determine who you want to contact (your target audience), what information you want to display, what new information you want to collect, and what existing information you want to update. Profile creation requires a thorough knowledge of your Customer Relationship Management database (to ensure that you are not creating a duplicate profile or profile field) and involves a collaboration between the marketer and the system administrator.

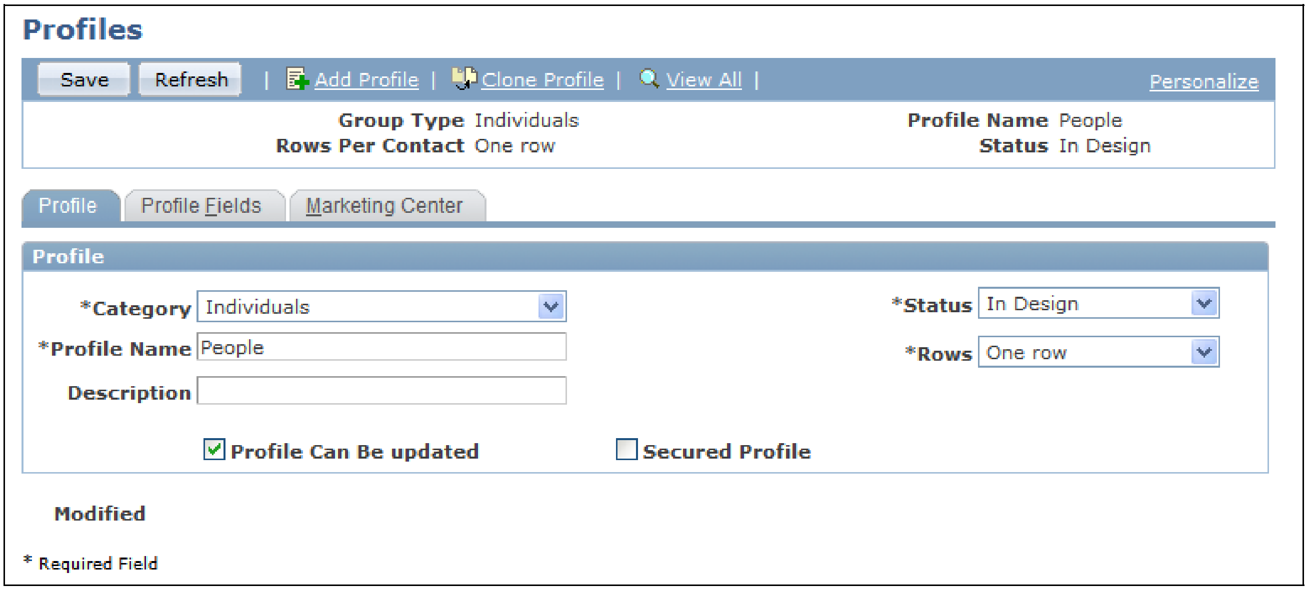
Note. If you have purchased PeopleSoft Online Marketing, you cannot use the following characters in profiles being used for Online Marketing documents: ampersand (&), apostrophe or single quote ('), double quote ("), greater than (>), less than (<), or period (.).

Pages Used to Create a Profile Request

Page Name	***Definition Name***	***Navigation***	***Usage***
Profiles	RA_PROFILE_SUMM	Set Up CRM, Common Definitions, Profile Management, Profile Definitions	View summary information about all of your profiles and to access an existing profile or create a new profile.
Profile	RA_PROFILE_DTL	• Click the profile name on the Profiles page to edit an existing profile. • Click the Add Profile button on the Profiles page to define a new profile.	Define basic information about the profile.
Profile Fields - Field Summary	RA_ATTRIBUTE_SUMM	Select the Profile Fields tab on the Profile page.	Add new fields to a profile, or view existing profile fields.
Profile Fields - Field Detail	RA_ATTRIBUTE_DTL	Click the Field Detail link on the Profile Fields - Field Summary page.	Define a new profile field or edit an existing profile field.
Profile - Marketing Center	RA_PROFILE_MKTCTR	Click the Marketing Center tab on the Profile page.	Secure a profile by Marketing Center.

Defining Basic Profile Information

Access the Profile page (click the profile name on the Profiles page to edit an existing profile or click the Add Profile button on the Profiles page to define a new profile).



Profile page

Group Type

Select *Individuals* when the profile information refers to persons.

Select *Organizations* when the profile information refers to organizational data.

Category

Shows the category to which the profile belongs.

Status

Select *In Design* while you are defining your profile request.

Select *Requested* to lock the profile design. Setting the status to *Requested* notifies your administrator that the profile design is complete. The administrator can manage approval and connect the profile to the database.

Select *Activated* to indicate that the profile fields have been mapped and the required profile table has been created.

Select *Rejected* to indicate that the profile design has been rejected by your system administrator.

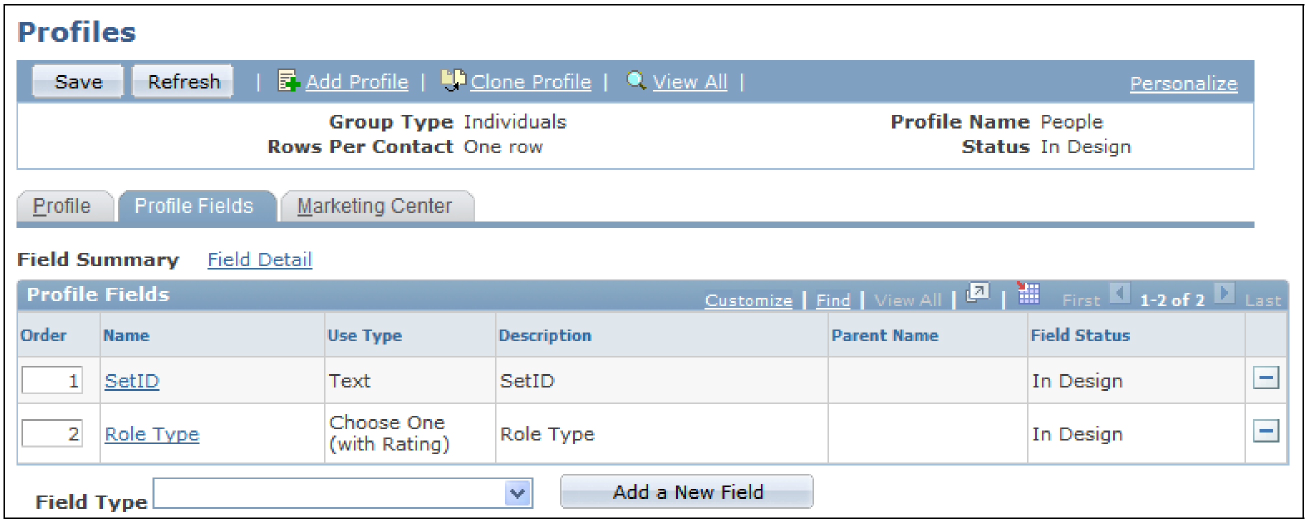
Select *Update* to edit an activated profile.

Note. As long as the status of a profile is *In Design*, your ability to edit and make changes is unlimited. A status of *Requested* or *Rejected* allows you to delete any profile field that is in a status of *In Design.* When the profile status is set to *Activated*, your ability to change or edit the profile is limited. For example, when a profile is activated you cannot delete a field. Likewise, you cannot delete field choices, but you can inactivate them.

Profile Name	Enter a name for the profile. **Note.** If you have purchased PeopleSoft Online Marketing, you cannot use the following characters in profile names used for Online Marketing documents: ampersand (&), apostrophe or single quote ('), double quote ("), greater than (>), less than (<), or period (.).
Rows	Row selection determines how many unique rows of data you can enter into the profile table for each contact. You can define profiles as either one row or many rows. After a profile is requested, you cannot change the row selection. Select *Many Rows* to allow multiple rows of data per contact. Select *One Row* to allow only one row of data per contact. For example, suppose that you use a one-row table to store information about whether your customer is a pet owner and how many pets your customer owns. If you want to store the names of the pets, you must allow for the possibility that your customer has more than one dog or cat. To record the names of multiple pets, you must use a Many Row table. **Note.** Profiles defined as *Many Rows* can be used only for audience selection. They cannot be used in online documents by PeopleSoft Online Marketing.
Profile Can Be Updated	Select this check box if the profile is available for update (for example, by customers changing their information on an Online Marketing web page form). If you mark profiles to not allow updates, the profile fields cannot be marked as questions.
Secured Profile	Select this check box to designate a profile as secured. When performing a search for profiles, only those secured profiles that a user has permission to access (that is, that they are authorized for at least one of the Marketing Centers associated with the profile) will be displayed as part of the search results.

Adding and Editing Profile Fields

Access the Profile Fields - Field Summary page (select the Profile Fields tab on the Profiles page).



Profile Fields - Field Summary page

Note. Click a column heading to change the sort order of the column.

Field Detail

Click to access the Profile Fields - Field Detail page where you defined the field.

Order

Displays the order in which profile fields appear when the profile is used. The order affects the display only, and users are free to select the fields in any order desired.

Name

Click the field name to access the profile field detail.

Use Type

Defines how to use the new fields. Values are:

- *Choose Many:* Defines a choice field that allows the respondent to select more than one response from a list of options.
- *Choose One:* Defines a choice field that allows the respondent to select only one response from a list of options.
- *Choose One (with rating):* Defines a choice field that allows the respondent to select only one response from a list of options and assigns a numeric value to the choice. Also, specifies a numeric value associated with the choices. These values are to be used in the generated results.
- *Date:* Defines an entry field for a date.
- *Decimal:* Defines an entry field for numbers that allows decimal positions. An example is a currency entry.
- *File:* Defines an entry field for uploaded files.
- *Integer:* Defines an entry field for numbers that do not allow decimal positions. An example is a response to the question: How many children do you have?
- *Map to Existing Field:* Defines a choice field that relies on a prompt table for response options. Prompt tables are useful when the response options are numerous. For example, you can use a prompt table field for state and country responses. Some common prompt tables (such as state and country) already exist within the system. If a prompt table does not exist, your system administrator will have to build it.

  Note. The *Map to Existing Field* field value is used for audience selection and data import only. PeopleSoft Online Marketing cannot use it in the creation of online documents. The *Map to Existing Field* field values cannot be included on profile tables with any other type of field. It is recommended that they reference a view rather than a system or profile table.

- *Text:* Defines an entry field that allows the respondent to enter a free-form text response. You must specify a field length. The maximum field length must be less than 254 characters.

  Note. PeopleSoft Online Marketing users can use a document text field (created within a PeopleSoft Online Marketing document) to capture text entries that are greater than 254 characters. Refer to the *PeopleSoft CRM 9.1 Online Marketing PeopleBook* for complete information.

- *Text Block:* Defines an entry field that allows the respondent to enter a free-form text response. You must specify a field length. The maximum field length must be less than 32,700 characters.
- *Time:* Defines an entry field to receive a response in a time format.

- *Yes/No:* Defines a choice field for which the responses are either yes or no.

Parent Name

Use this drop-down field to specify a relationship among field choices (for example, you could specify that a field named College is the parent of a Department field, and the Department field is in turn the parent of a field named Major). You can define three levels of hierarchy using this field; it appears only for fields of type *Choose One* and *Choose One with Rating.*

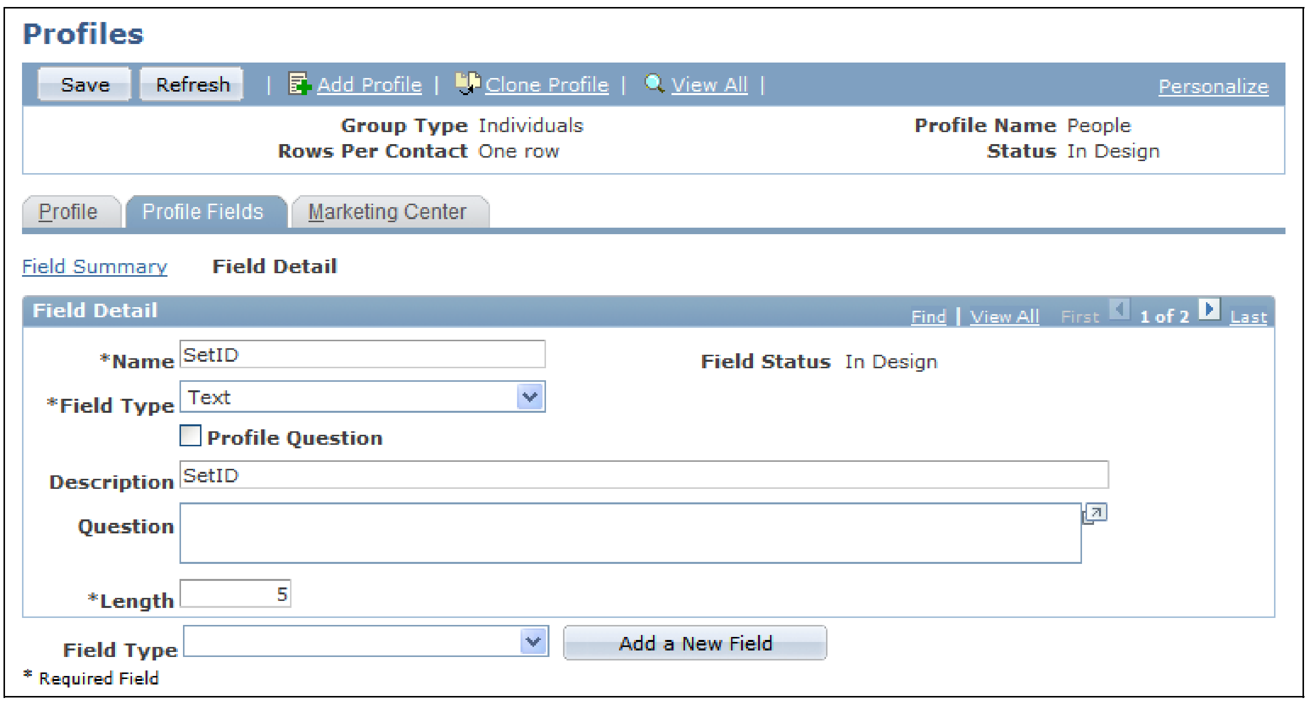
Note. This dynamic enumeration functionality applies only to Basic and Custom profile fields used with Online Marketing.

Field Status

Displays the current status of the profile field and always depends on the status of the profile. Values are *In Design, Active,* and *Update.*

Defining Field Detail

Access the Profile Fields - Field Detail page (click the Field Detail link on the Profile Fields page).



Profile Fields - Field Detail page

Name

Enter a name for the field.

Field Status	Displays the current status of the profile field and always depends on the status of the profile. Values are *In Design, Active,* and *Update.* You can alter the profile field value when the field status is *In Design* or *Update.* When a profile is activated, all profile field statuses change to *Active.* To alter a profile field value, change the status of the profile to *Update,* then change the profile field status to *Update.*
Use Type	The use type value that you selected when you added the new field appears as the default value. Until the profile is activated, select a new option to change the field type.
Profile Question	Select to make this field available for use in a web document or email blast.
Description	Enter a description of the field. The description appears on the Profile Fields - Field Summary page.
Question	If the profile field is specified as a profile question (the Profile Question check box is selected), enter a question that is designed to elicit a desired response. For example, if the value for the profile field is *Number of Pets,* your question might be: "How many pets are in your household?"

The following fields appear only with certain use types.

Order	Indicates the order in which you want the response options to appear. Change the order by changing the number in this field. Save the page to make the changes effective.
Choices	Enter the choice values for the profile field question. The value that you enter appears where the profile is used.
Rating	When *Choose One (with Rating)* is selected as the use type, enter a rating value for each option. Rating values are measured from the smallest numerical value to the highest. For example, a rating of 1 is less than a rating of 5.
Map to Field	When *Map to Existing Field* is selected as the use type, select the underlying prompt table. **Note.** If the prompt table is unknown or does not exist, this field can be left blank. If the prompt table does not exist, a system administrator must build it before the profile is activated.
Length	When *Text or Text Block* is selected as the use type, enter a text field length. The maximum field length for the *Text* use type must be less than 254 characters. The maximum field length for the Text Block use type is less than 32,700 characters.

Modifying Active Profiles

You can make the following changes to activated profiles:

- Modify a profile field question.
- Change a profile field into a question field or change a question field into a non-question field.
- Add or inactivate field choices.
- Add a new profile field.

Note. After a profile is inserted into a PeopleSoft Online Marketing document, changes to the profile do not affect the document unless the profile is deleted from the document and then reinserted.

Profile changes are not required to be applied to all documents. In fact, situations will occur in which you will not want to change a document. For example, you can insert a profile into two or more documents if you intend to offer different choices to a particular question. By modifying the choices on the profile, you can insert the version with the appropriate choices into the different documents.

With the exception of adding a new profile field, you can easily modify active profiles without having to resubmit your profile request.

Making Changes That Do Not Require a New Request

Changes to existing fields do not affect the underlying profile table. Rather, these changes affect what is called the metadata.

To make changes that do not require a new request (changes to the metadata):

1. Change the status of the profile to *Update.*
2. On the Profile Fields - Field Summary page, click the field that you want to modify.

   This enables you to access the Profile Fields - Field Detail page, where you must change the Status field to *Update.*
3. Make the change.

   For example, to add a new choice to the *Choose Many* field value, click one of the Add buttons in the Choice column. To eliminate a choice, select the Inactivate check box beside the choice that you want to eliminate. You can also select or deselect the Profile Question check box to change whether a field appears as a question, or change the text of a question.
4. Return to the Profile page, change the profile status to *Activated* and save the profile.

Adding a New Profile Field

Adding a new profile field requires a change to the profile table and can be completed by you or by the administrator, depending on your organization's requirements.

To add a new profile field to an existing profile:

1. Change the status of the profile to *Update.*

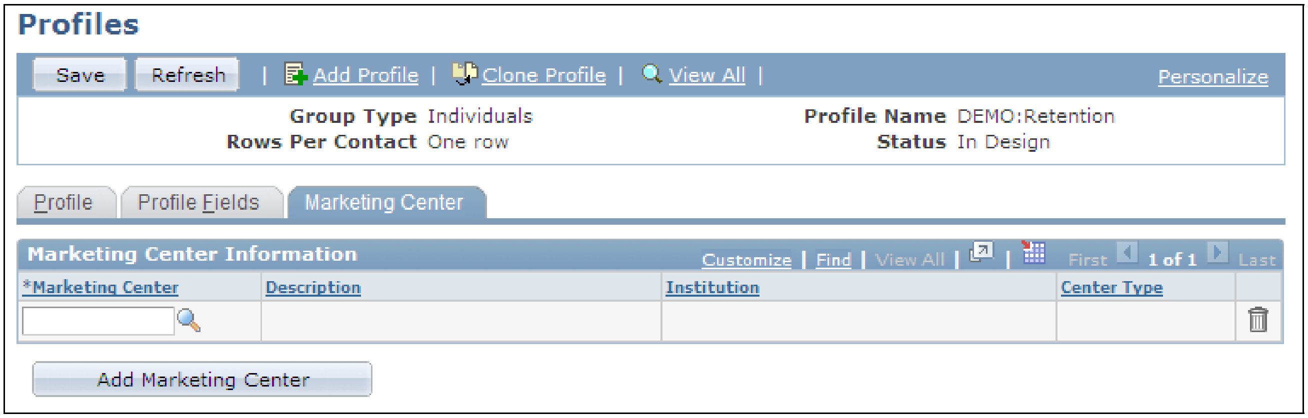
2. On the Profile Fields - Field Summary page, select the use type for the field that you want to add and click the Add a New Field button.

3. Enter the field information and save the page.

4. Return to the Profile page, change the profile status to *Requested,* , and save the profile.

Securing a Profile by Marketing Center

Access the Marketing Center page (click the Marketing Center tab on the Profile page.)



Profile - Marketing Center page

Marketing Center

Click the search icon and select a Marketing Center from the available list. Only those users or roles associated with the Marketing Center will be able to access the profile.

Add Marketing Center

Click this button to add another Marketing Center row to the grid.

When creating a profile, you can designate it as secure by selecting the Secured Profile check box on the Profile tab. When performing a search for profiles, only those secured profiles that a user has permission to access (that is, that they are authorized for at least one of the Marketing Centers associated with the profile) will be displayed as part of the search results. Profile definition functionality for documents and audiences will only display profiles that the user is authorized to access.

Note. Only custom profiles (that is, not AAF based profiles such as Case History and so forth) will be available for security. The People profile, because it should always be available for all users, does not include a Secured Profile check box.

Registering a Profile

When a profile request is set to a status of *Requested,* it becomes available for registration and activation. Registration is the process of mapping the profile fields to a profile table (record) and then making the profile available for use. Registration is a simple matter of linking the profile to the profile table and activating the profile.

Note. *Map to Existing Field* field value types rely on an underlying prompt table for field values.

Choose Many field value types rely on a child table for field values.

If you have purchased PeopleSoft Online Marketing, the following characters cannot be used in profiles being used for Online Marketing documents: ampersand (&), apostrophe or single quote ('), double quote ("), greater than (>), less than (<), or period (.).

Critical Information for System Administrators

System administrators who are responsible for creating profile tables should become fully familiar with PeopleSoft Application Designer. To ensure proper interaction between PeopleSoft Marketing and Online Marketing, you must follow specific record and view design parameters.

See *PeopleTools 8.52: PeopleSoft Application Designer Developer's Guide*

This table lists information that applies to profile table fields that are created using PeopleSoft Application Designer:

Profile Field Type	PeopleTools Field Type	Notes
Choose Many	NA	Separate child table is needed. No new fields are required for the profile record.
Choose One	Char (254)	
Choose One with Rating	Number (18,0)	Must be signed.
Date	Date	
Decimal	Number (18,4)	Must be signed.
File	Char (254)	
Integer	Number (18,0)	Must be signed.
Map Field Choice to Prompt	Char (x)	Map Field Choice to Prompt fields cannot be included in profile tables with any other type of field. Oracle recommends that you create a view for this data rather than a profile table. The field that is referenced determines the PeopleTools field type. See the section related to building views in the PeopleSoft Application Designer documentation.

Profile Field Type	*PeopleTools Field Type*	*Notes*
Text	Char (X)	X represents the desired field length as defined in the profile definition request .
Text Block	Long Character	
Time	Time	
Yes/No	Char (1)	

The following information applies to profile tables (records) created using PeopleSoft Application Designer:

- *One Row* profile records require the BO_ID field (as a key and search key field) and all other fields as defined in the profile request (as non-keys). At the end of the record, include the RB_AUDIT_SBR subrecord.
- *Many Rows* profile records require the BO_ID and RA_ATTRIB_SEQ fields (as key and search key fields) and all other fields as defined in the profile request (as non-keys).

  At the end of the record, include the RB_AUDIT_SBR subrecord. Also, you must create a new index. When you create the index, add comments and make sure that the clustered and unique check boxes are deselected. Add the BO_ID field to the index.
- A record that includes a *Choose Many* use type must also have a child record to contain the choices that are selected by the respondent.

  The child record requires the BO_ID and RA_ATTRIB_SEQ fields (as key fields), CHOICE (as a non-key field), and the RB_AUDIT_SBR subrecord. These are the only fields you should have on your *Choose Many* child record. Also, you must create a new index. When you create the index, add comments and ensure that the clustered and unique check boxes are deselected. Add the BO_ID field to the index.

  A record that includes a *Text Block* use type must also have a child record to contain the choices that are selected by the respondent.

  The child record requires the BO_ID and RA_ATTRIB_SEQ fields (as key fields), LONG_TEXT (as a non-key field), and the RB_AUDIT_SBR subrecord. These are the only fields you should have on your *Text Block* child record. Also, you must create a new index. When you create the index, add comments and ensure that the clustered and unique check boxes are deselected. Add the BO_ID field to the index.

Profile records must follow a standard naming convention (<recprefix>_<profileName>) that uses the record prefix that is designated on the Profile Setup page. For example, if the record prefix is OMP, and your profile record relates to pets, you might use the name OMP_PETS.

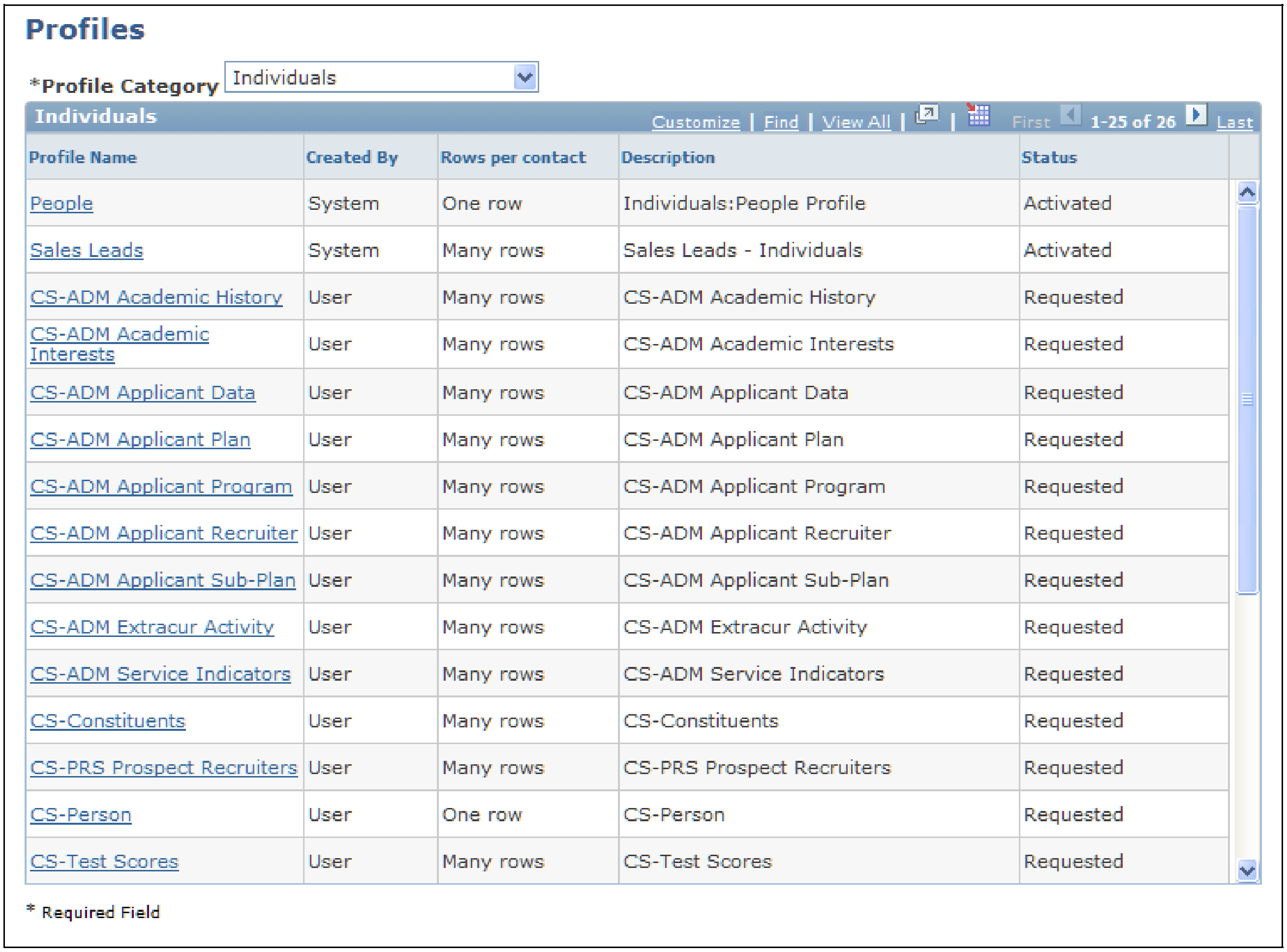
Note. Unless the system administrator decides to create a custom tablespace for profile tables, use the RALARGE tablespace.

Pages Used to Register a Profile

Page Name	*Definition Name*	*Navigation*	*Usage*
Profiles	RA_PROFILE_DTL	Set Up CRM, Common Definitions, Profile Management, Profile Registration, Profiles	View the profiles that are registered.
Profile Registration - Profile Fields - Field Summary	RA_ATTRIBUTE_SUMM	• Click a Profile Name link on the Profile page. • Click the Field Summary link on the Profile Fields - Field Detail page.	Enter or view summary information about profile fields.
Profile Registration - Profile Fields - Field Detail	RA_ATTRIBUTE_DTL	Click the Field Detail link on the Profile Fields - Field Summary page.	Enter or view detailed information about profile fields.

Viewing Registered Profiles

Access the Profiles page (Set Up CRM, Common Definitions, Profile Management, Profile Registration, Profiles).



Profiles

*Profile Category Individuals

Individuals — Customize | Find | View All | First 1-25 of 26 Last

Profile Name	Created By	Rows per contact	Description	Status
People	System	One row	Individuals:People Profile	Activated
Sales Leads	System	Many rows	Sales Leads - Individuals	Activated
CS-ADM Academic History	User	Many rows	CS-ADM Academic History	Requested
CS-ADM Academic Interests	User	Many rows	CS-ADM Academic Interests	Requested
CS-ADM Applicant Data	User	Many rows	CS-ADM Applicant Data	Requested
CS-ADM Applicant Plan	User	Many rows	CS-ADM Applicant Plan	Requested
CS-ADM Applicant Program	User	Many rows	CS-ADM Applicant Program	Requested
CS-ADM Applicant Recruiter	User	Many rows	CS-ADM Applicant Recruiter	Requested
CS-ADM Applicant Sub-Plan	User	Many rows	CS-ADM Applicant Sub-Plan	Requested
CS-ADM Extracur Activity	User	Many rows	CS-ADM Extracur Activity	Requested
CS-ADM Service Indicators	User	Many rows	CS-ADM Service Indicators	Requested
CS-Constituents	User	Many rows	CS-Constituents	Requested
CS-PRS Prospect Recruiters	User	Many rows	CS-PRS Prospect Recruiters	Requested
CS-Person	User	One row	CS-Person	Requested
CS-Test Scores	User	Many rows	CS-Test Scores	Requested

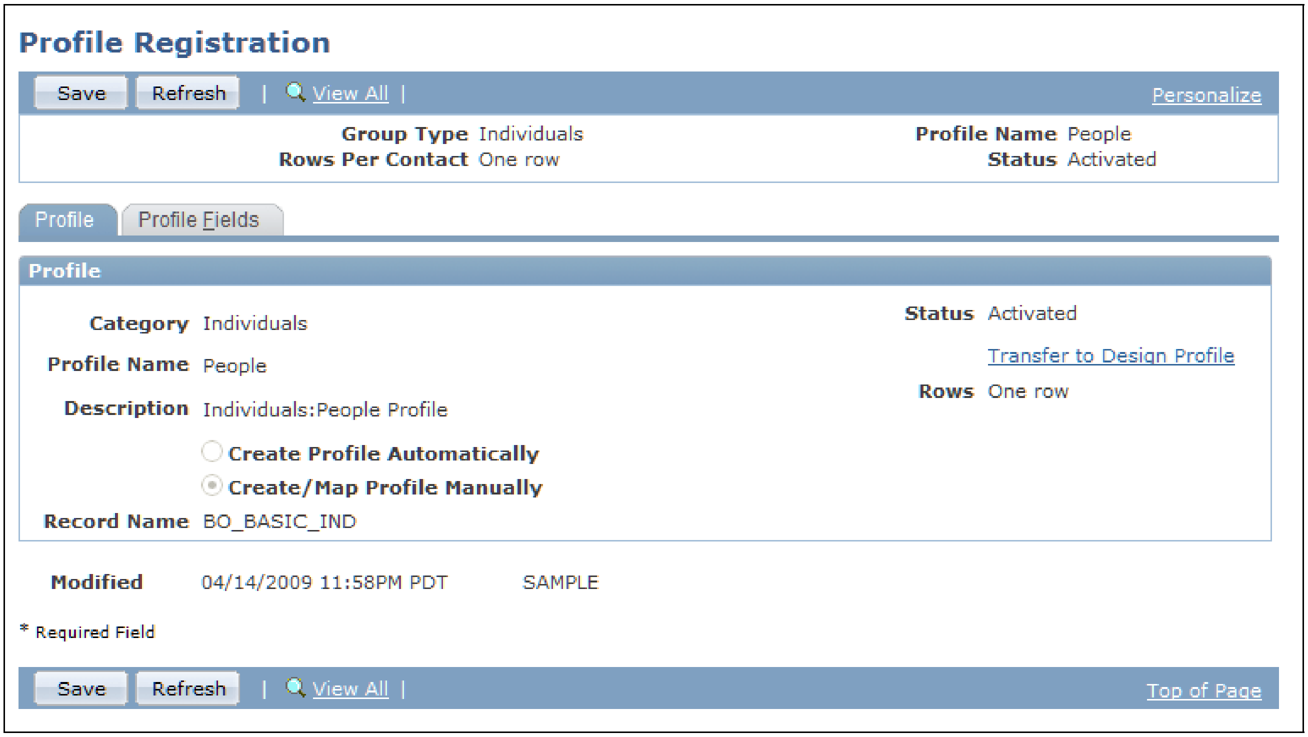
* Required Field

Profiles page

This page enables you to view all the profiles that are defined to the system. Click a profile name to view or modify profile detail.

Reviewing the Profile Request

Access the Profile Registration - Profile page (Set Up CRM, Common Definitions, Profile Management, Profile Registration, Profiles) then click a profile name.



Profile Registration - Profile page

Status

Select *Activated* when the profile registration is complete. This makes the profile available for use.

Select *Rejected* when the profile request is unacceptable and must be redefined or discarded.

Select *Requested* when the profile has not been registered and activated.

Note. If the profile was automatically created, and reactivation requires changes to the record (table), the profile status is changed to Activating until the necessary processing is complete.

Create Profile Automatically

Select to generate the profile record to use to store the profile information automatically.

Create/Map profile Manually

Select to map the profile and the record where the profile information is stored manually.

The record must be created in the application designer in advance. If this option is selected, specify the record in the Record Name field.

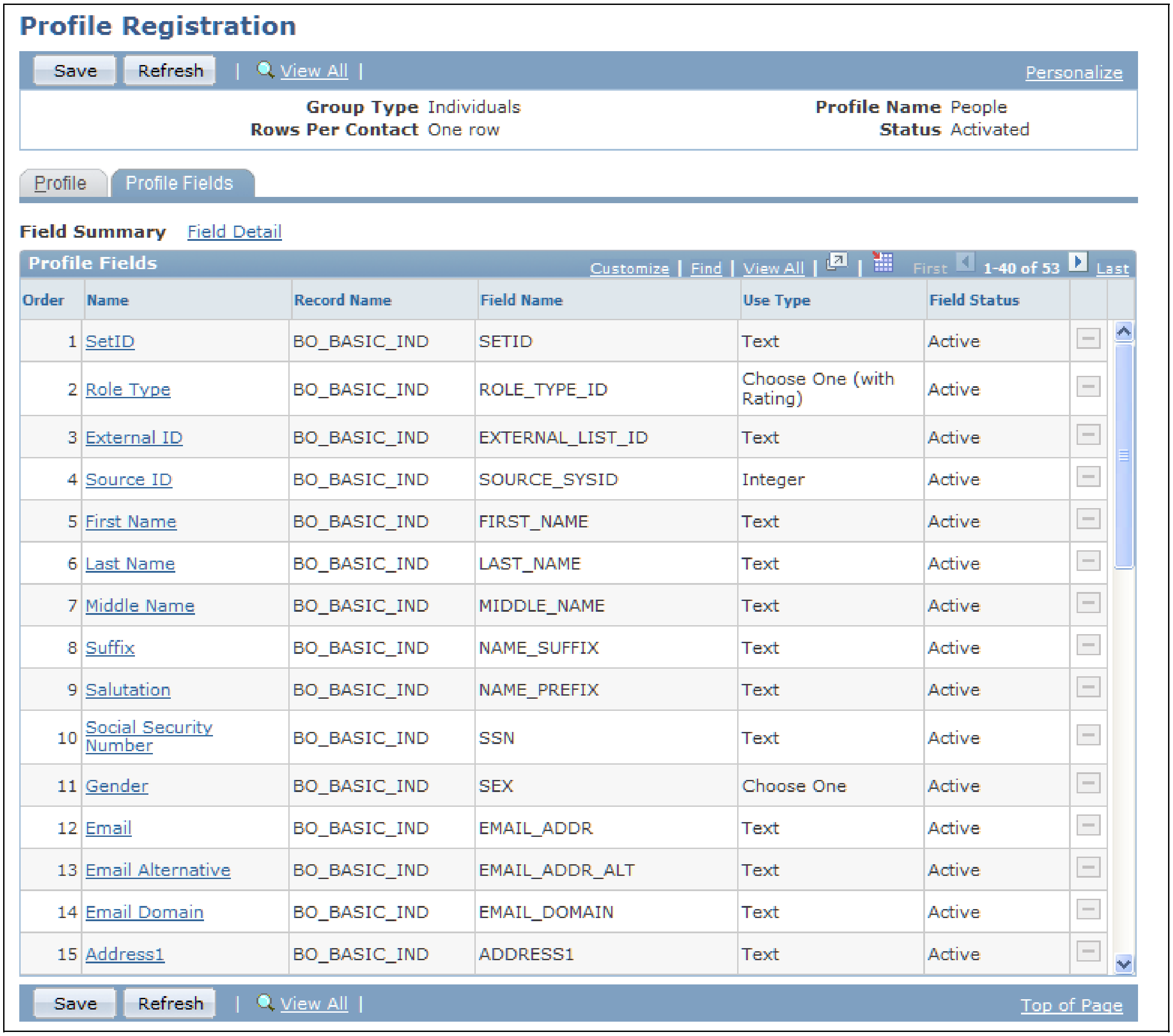
Record Name

Select the record (table) that was created for this profile.

Mapping Field References

Access the Profile Registration - Profile Fields page (click a Profile Name link on the Profile page, then select the Profile Fields tab).

Note. The Profile Fields pages of profiles that were automatically created (and thus, automatically mapped) do not display the Record Name and Field Name columns on the Profile Fields grid.



Profile Registration - Profile Fields page

Name Displays the profile field name.

Record Name Confirm the profile table record name. If the profile field is a *Choose Many* or *Text Block* use type, select the correct child record. If the profile field is a *Map to Existing Field* use type, confirm that the Map to Field field on the Profile Fields - Field Detail page is set to the appropriate prompt table record name.

Field Name Select the profile record field name that corresponds to the profile field name.

Delete Click to remove a profile field.

Note. Fields cannot be deleted from an activated profile. After a profile is activated, you can update field details, but the changes affect profile use only from the time of the change forward.

Completing the Activation Process

When the profile fields are matched to the profile table (registered), return to the Profile Registration - Profile page, set the profile status to *Activated*, and save the page to activate the profile.

Setting Up Profile Groups

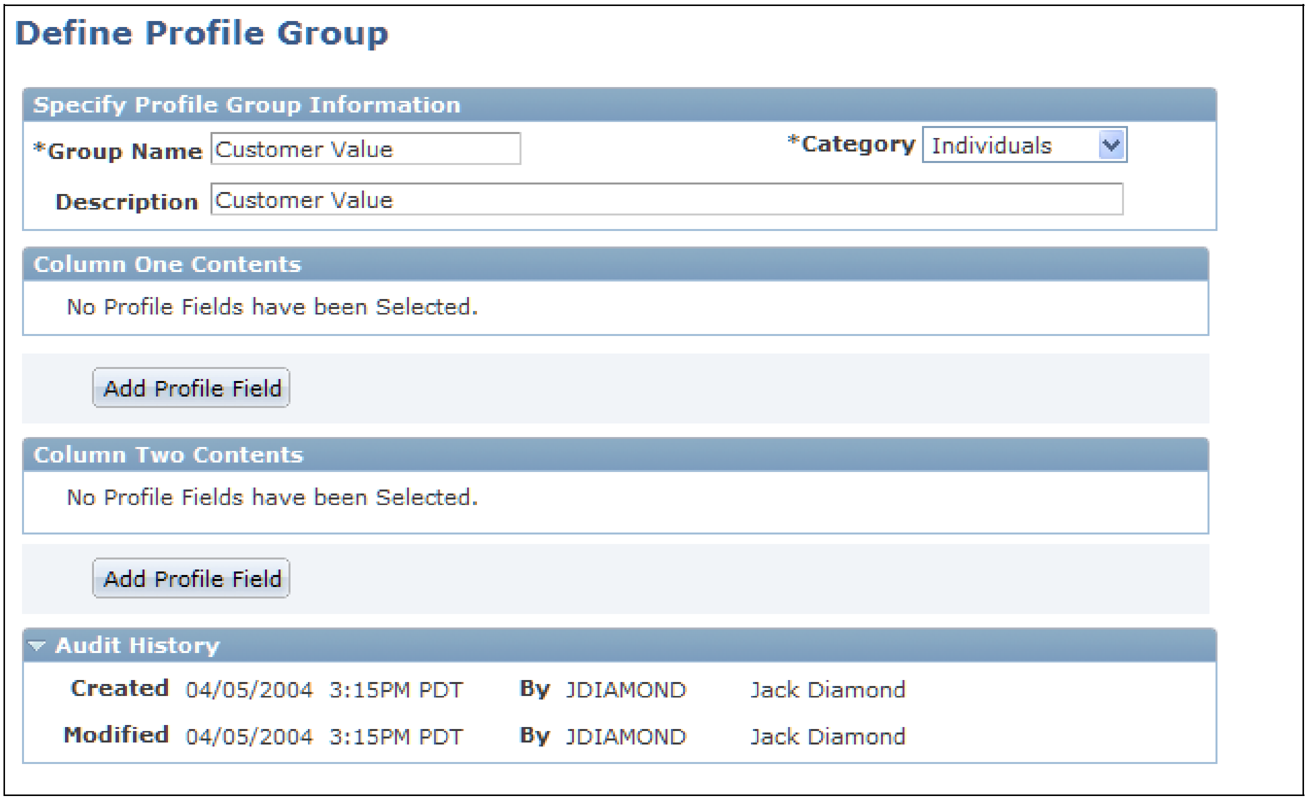
This section discusses how to set up profile groups.

Pages Used to Set Up Profile Groups

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Profile Group	RA_PRFL_DEF_PG1	Set Up CRM, Common Definitions, Profile Management, Profile Groups, Define Profile Group	Define profile groups.
Define Profile Group - Add Profile Field	RA_PRFL_FLD_SEC	Click the Add Profile Field button on the Define Profile Group page.	Select profile fields to add to a profile group.
Assign Profile Group Display - Assign Profile Group Display	RA_CMPT_PRFL_PG	Set Up CRM, Common Definitions, Profile Management, Profile Groups, Assign Profile Group Display	Assign profile groups to a CDM component.
Optionally, assign Profile Group Display - Edit Condition	RA_CND_BLD_PG	Click the Edit Condition button next to a profile group on the Assign Profile Group Display - Assign Profile Group Display page.	Specify the conditions under which the profile group fields appear on the More Info or Summary page or leave blank.

Defining Profile Groups

Access the Define Profile Group page (Set Up CRM, Common Definitions, Profile Management, Profile Groups, Define Profile Group).



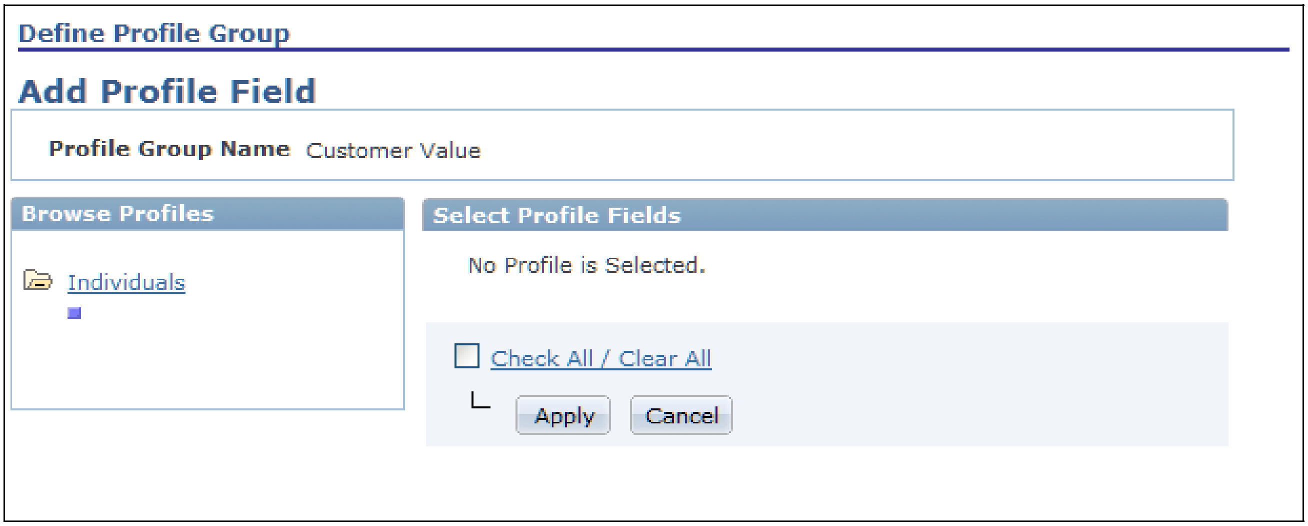
Define Profile Group page

Note. You can select only profile fields in activated profiles for profile groups.

You cannot add profile fields from the basic tables or many row profiles to profile groups.

Selecting Profile Fields

Access the Define Profile Group - Add Profile Field page (click the Add Profile Field button on the Define Profile Group page).

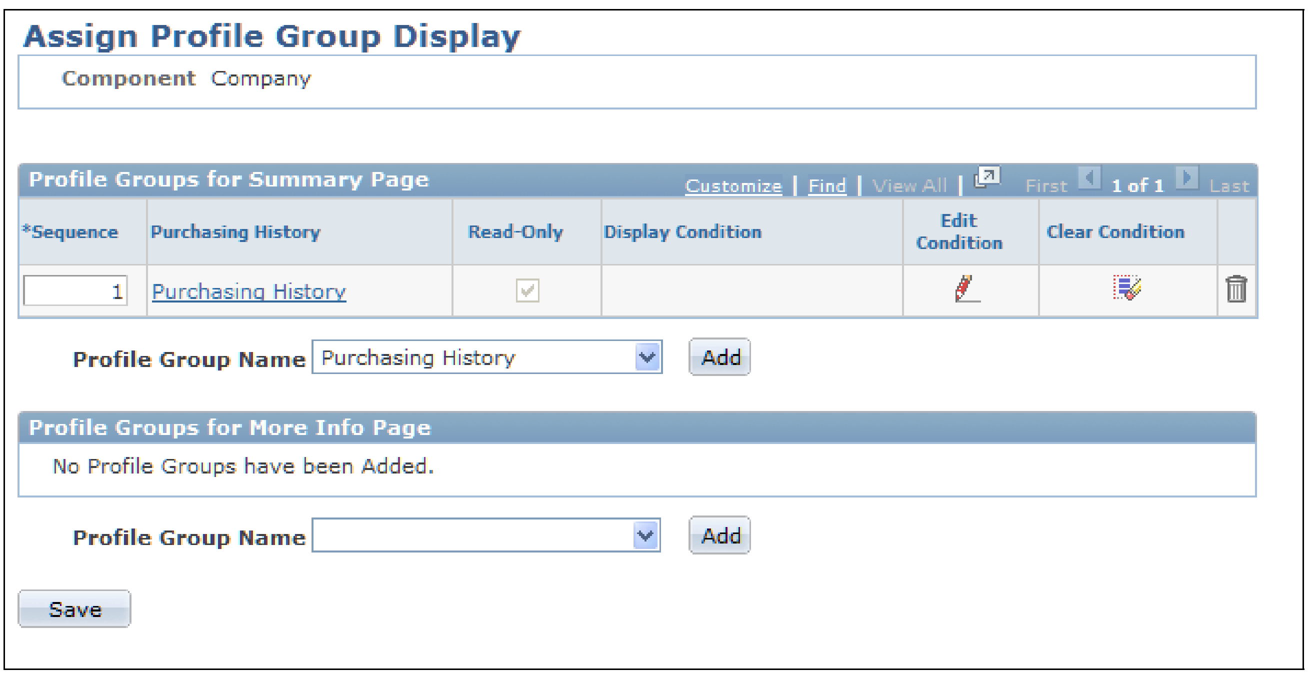


Define Profile Group - Add Profile Field page

Select a profile to view the fields that it contains. Select one or more fields and click Apply. You must apply the fields to the profile before saving the profile.

Assigning Profile Groups to CDM Components

Access the Assign Profile Group Display page (Set Up CRM, Common Definitions, Profile Management, Profile Groups, Assign Profile Group Display).



Assign Profile Group Display page

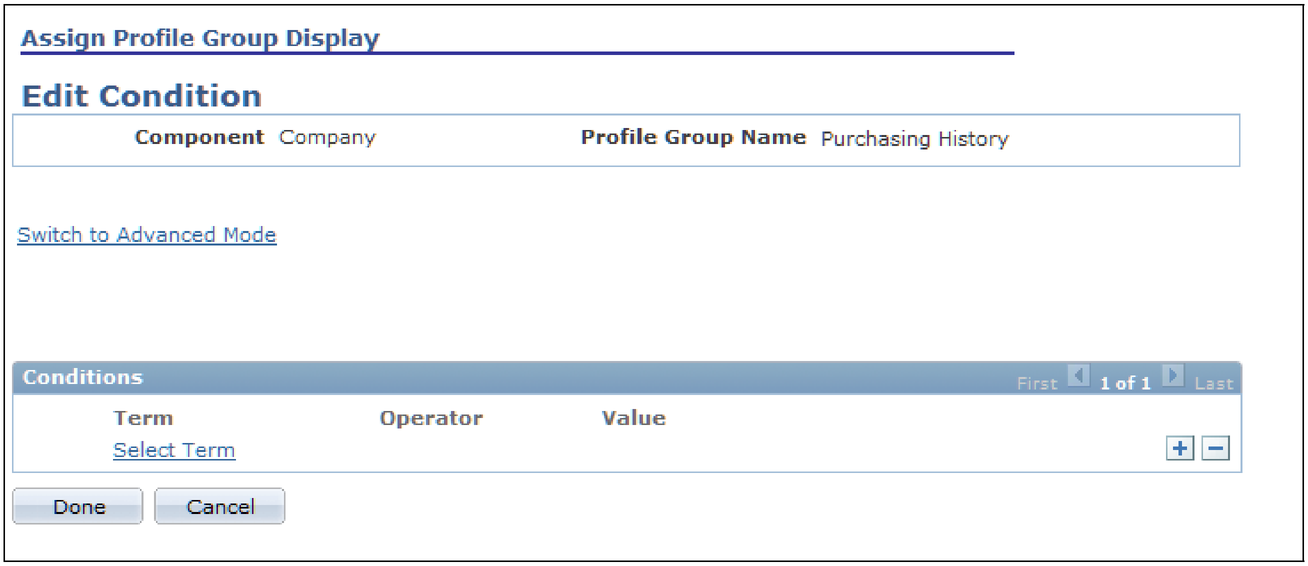
Note. The fields in the Profile Groups for Summary Page region are available for the Company and Partner Company components only.

Add Click to add a profile group to the component.

 Click the Edit Condition button to define the conditions under which the profile appears.

Specifying Conditions

Access the Assign Profile Group Display - Edit Condition page (click the Edit Condition button next to a profile group on the Assign Profile Group Display - Assign Profile Group Display page).



Assign Profile Group Display - Edit Condition page

Click a condition that is listed in the Conditions region to view and edit the condition.

Switch to Advanced Mode Click to specify complex conditions.

Note. Terms are programmatically created as profile fields are activated, except for the type *Choose Many*. You can use most profile terms anywhere AAF is used.

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

Viewing and Updating Profile Data

This section discusses how to view and update profile data information.

Pages Used to View and Update Profile Data

Page Name	Definition Name	Navigation	Usage
Company - More Info Partner Company - More Info Person - More Info	RD_PROFILE	• Customers CRM, Search Company, Company, More Info • Customers CRM, Search Person, Person, More Info • Partners CRM, Search Partner Company, Partner Company, More Info	View and update profile information.
Company - Summary	RD_COMPANY_SUMMARY	Customers CRM, Search Company, Company, Summary	View profile information for a company.
Partner Company - Summary	RD_PARTNER_SUMMARY	Partners CRM, Search Partner Company, Partner Company, Summary	View profile information for a partner company.

Viewing and Updating Profile Information

Access the More Info page for a company (Customers CRM, Search Company, Company, More Info), person (Customers CRM, Search Person, Person, More Info), or partner company (Partners CRM, Search Partner Company, Partner Company, More Info).

Inserting and Updating Rows in Profiles

This section describes how to insert and update rows in single row and multi row profiles. The individuals whose profiles are updated are based on the audience that is selected. You can view a profile change history by opening a completed profile update.

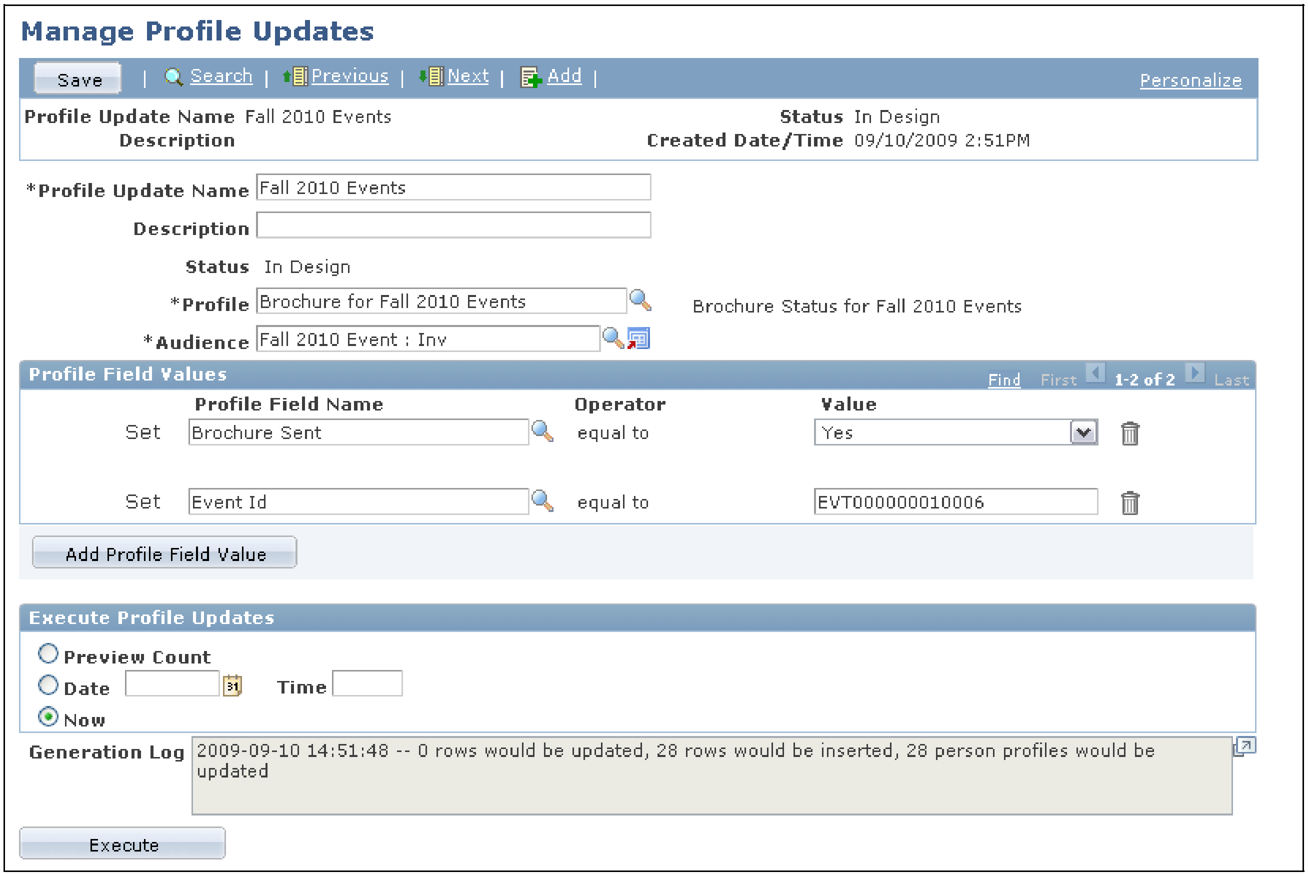
Only user created (custom) profiles in the Individual folder with a status of *Activated* that the current user is authorized to access can be updated. You will only be able to view a preview row count with static audiences.

Page Used to Insert and Update Rows in Profiles

Page Name	Definition Name	Navigation	Usage
Manage Profile Updates	RA_PROF_UPD	Marketing, Manage Profile Updates	Insert and update rows in single row and multi row profiles.

Managing Profile Updates

Access the Manage Profile Updates page (Marketing, Manage Profile Updates).



Manage Profile Updates page

Profile Update Name Enter a descriptive name for the profile update.

Description Enter a description for the profile update.

Status The current profile status.

Profile Select from a list of the current custom profiles. The prompt displays only profiles in the Individual category with the status of *Activated*; the People profile and any AAF or Organization profiles are not displayed. Further, only profiles that the current user is authorized to access are displayed in the profile prompt.

Audience Only authorized audiences are displayed in the Audience prompt. Additionally, you can only transfer to the audience (using the transfer icon next to the prompt) if the user is authorized. If the user is not authorized, then an error message is displayed.

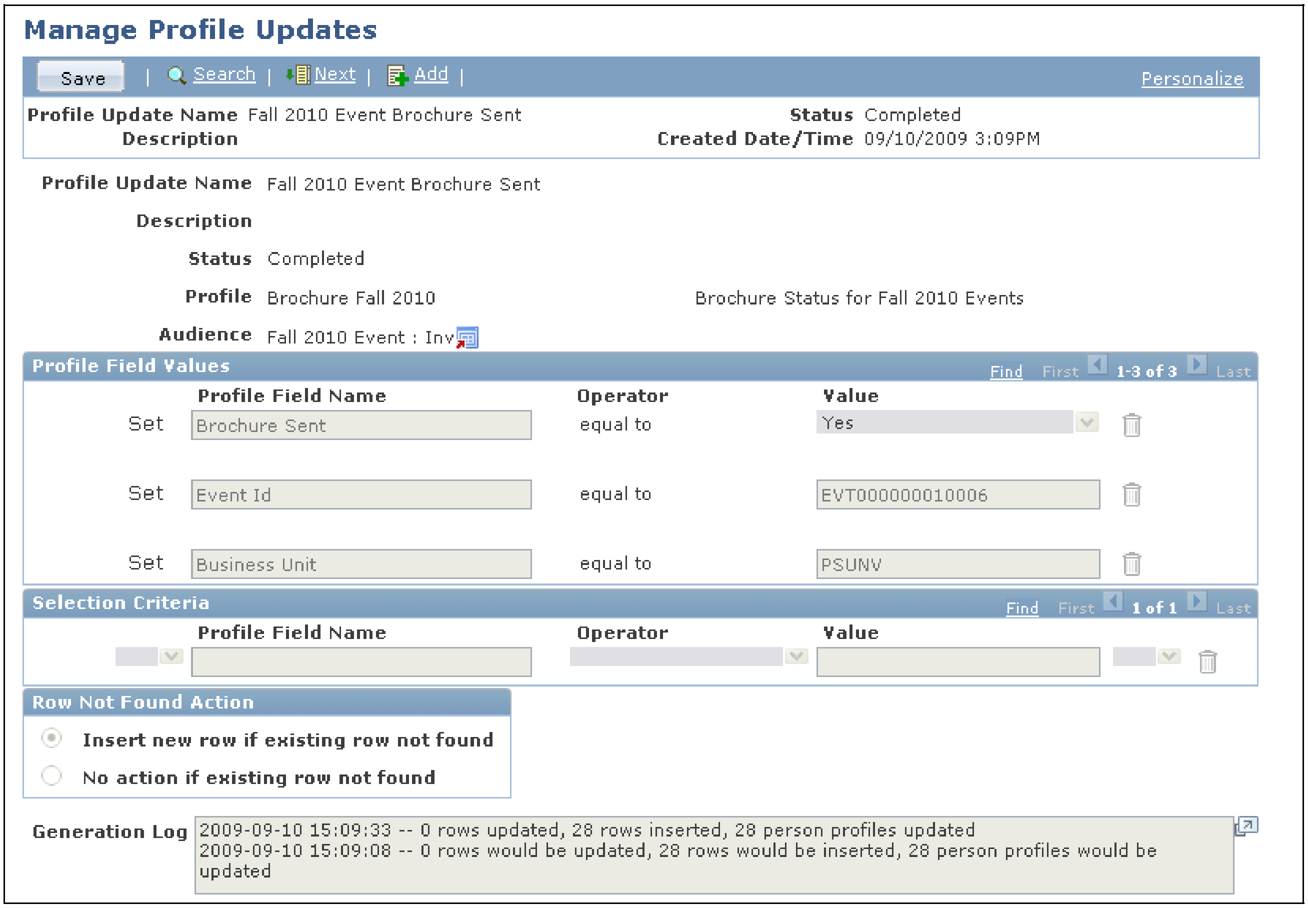
Single Row Profile Updates

The following items refer to both single row and multi row profile updates.

Profile Field Values	Select the profile field, then enter the value to which you want to change it. If a row currently exists for a person, then that row will be updated; if a row does not currently exist, then a new row with the field values set will be inserted. If you only want to update existing rows, you can select an audience where single rows currently exist (so the processing will be updated only upon execution).
Add Profile Field Value	Click this button to add another profile field value row.

Multi Row Profile Updates

When the selected profile is a multi row profile, an additional scroll area appears on the Manage Profile Updates page, allowing the entry of selection criteria (that is, allowing users to determine which multi-row profile rows will be inserted or updated).



Manage Profile Updates page with multi-row profile options

Selection Criteria

Select the profile field and operator and enter the value to which you want to change it. The first and last fields in this group box are open and closed brackets, necessary only if you want to group criteria. If you include an open bracket, you must include a corresponding closed bracket.

For each selection criterion after the first, an AND/OR/WITH field appears. This field is required only if you include two or more selection criteria, and does not appear otherwise.

Row Not Found Action

If you select *Insert new row if existing row not found* and no matching existing row is found, then the values in the selection criteria and in the Profile field values sections will be used to insert a new row. Values in the selection criteria will be eligible for inserts only you have used the operators 'is equal to' or 'is equal to current date' while setting selection criteria.

If you select *No action if existing row not found*, then no new rows will be inserted if no matching existing row is found.

Existing rows are updated regardless of the value selected for this field.

Executing the Profile Update

Use the Execute Profile Updates section to specify the validations you want the system to perform when you click the Execute button. In all cases, the following validations occur:

- The Profile, Profile Description and Audience fields must not be blank.
- At least one Profile Field and Value must be entered in the Profile Field Values grid.

Execute

Click this button to perform the specified profile update.

Preview Count

If this option is selected, a row count is displayed showing how many rows will be updated if the update were performed, but the profile table is not actually updated. A count of the total number of rows that would be updated , the total number of rows that would be inserted and the total number of users whose profile row(s) would be changed is displayed in the Generation Log field.

You can only use this option for static audiences.

Date, Time

Enter a date and time to submit the update. If this option is selected and the Execute button is clicked, then the job status is displayed and the user can choose to view more details from the Process Monitor.

Now

Select this option to submit the job immediately. The status details are shown and the Generation Log is updated with the actual details (number of rows updated, number inserted, and number of Person profiles updated or inserted) after the job is completed.

State Changes for Profile Updater

The following table shows the states through which a profile can progress when an update is performed.

From State	*To State*	*State Processing*
In Design	Queued	This status change occurs automatically when you click the Execute button to process either Now or for a future date.
Queued	Processing	The update is in process.
Processing	Completed	This status change occurs by the Application Engine Profile Updater process when the update completes successfully. When the profile update is in this state, no changes are allowed to the profile update (page is display only).

From State	***To State***	***State Processing***
Processing	Failed	This status change occurs by the Application Engine Profile Updater process when the update completes but is not successful. When the profile update is in this state, the only change that the user can make is to change Status back to *In Design.*
Processing	Aborted	This status change occurs by the Application Engine Profile Updater process when the process ends unexpectedly. When the profile update is in this state, only change that can be made by the user is to change Status back to *In Design.*
Completed	None	When the profile update is in this state, no changes are allowed to it (page is display only).
Failed	In Design	This status change can be manually made by the user. It is required before the process can be run again.
Aborted	In Design	This status change can be manually made by the user. It is required before the process can be run again.

Chapter 8

Working with the Relationship Viewer

This chapter provides an overview of the relationship viewer and discusses how to:

- Configure relationship views.
- Configure the relationship viewer.
- View and maintain relationships and roles.

Understanding the Relationship Viewer

This section discusses:

- Purpose of the relationship viewer.
- Types of relationships.
- Implicit and explicit relationships.
- Roles in the relationship viewer.
- PeopleSoft Customer Relationship Management (PeopleSoft CRM) sample relationship views.

Purpose of the Relationship Viewer

The relationship viewer enables you to view, maintain, and add relationships for a specified business object, such as a company, site, consumer, contact, or ad hoc business object. You can configure relationship views that determine the relationships that appear in the relationship viewer. The relationship viewer is available as a standalone component, or you can access it from within the Company, Partner Company, Person, Site, Ad Hoc Business Object, Financial Account, and 360-Degree View components.

Types of Relationships

You can show four kinds of relationships in the relationship viewer: direct, indirect, peer-to-peer, and hierarchical. A *direct relationship* is established between two business objects of any type. For example, a direct relationship between a person and a company is established when you define the person as an employee of the company.

An *indirect relationship* is implied between two business objects that have the same type of relationship with a third business object. For example, even though two workers at a company work in different departments and are not directly related, they are indirectly related because each one has an employment relationship with the same company.

A *peer-to-peer relationship* is set up between business objects of the same type that share a direct relationship to a third business object of a different type. A peer-to-peer relationship formalizes an existing indirect relationship. Typically, you establish peer-to-peer relationships for the subset of indirect relationships that provide information that is relevant to the business objectives. For example, you might establish peer-to-peer relationships among the players on a company softball team to formalize the indirect relationship that these players already have to each other.

You can monitor relevant peer-to-peer relationships instead of viewing the entire set of indirect relationships. To continue the softball example, if the relationship viewer is configured to show direct relationships and peer-to-peer relationships, the relationship view shows that each player has a direct relationship to the company and a peer-to-peer relationship to the other players on the team. If you do not establish the peer-to-peer relationship among team members, you can only view all indirect relationships between each employee of the company, and you cannot identify which employees have a team member relationship to each other.

Hierarchical relationships show parent-child relationships between business objects. Relationship hierarchies are graphically represented with a tree format in the relationship viewer. Parent-child relationships are defined by the relationship type and the designation of business object 1 and 2 in the relationship, where business object 1 is interpreted as the parent and business object 2, the child.

The tree format view is not limited to true hierarchical relationships. You can also present peer-to-peer relationships in a tree format by designating one of the two roles as the parent when you set up the relationship view.

Note. Using the multi-company relationship view through relationship viewer, a parent company/company relationship can only be established with an existing company.

Implicit and Explicit Relationships

From all of the components that include the relationship viewer, you can view relationships that are created both implicitly and explicitly. Implicit relationships are automatically recorded to capture a relationship that is implied by a specified transaction. For example, when a company is associated with a contact by using the Company component, the system automatically records a relationship between the company and the contact: Contact ⇔Company, relationship type ID 10. PeopleSoft CRM provides system data, including role types and relationship types, for all implicit relationships. You can manually create or update implicit relationships by using the relationship viewer.

You can manually create explicit relationships by using the relationship viewer that is available in the Company, Consumer, Representative, Site, and ad hoc Business Object components. To create these relationships, you must set up the appropriate control values and configure a relationship view to recognize this type of relationship.

Roles in the Relationship Viewer

In PeopleSoft CRM, each business object might have more than one role. Roles determine which default views appear in the relationship viewer.

For example, Jim Smith has both the Contact and Consumer roles and he is currently in focus on the relationship viewer. The Contact role has a priority of 1, and the Consumer role has a priority of 2. In this case, the default relationship views that appear for Jim Smith in the relationship viewer are those views that are defined for the Contact role.

PeopleSoft CRM Sample Relationship Views

The sample data that accompanies the PeopleSoft CRM installation CD contains these relationship views that you can modify to meet the business requirements:

Relationship View	***Configuration***
CONSUMER CONTACTS	Level 1: (Role) Individual Consumer Level 2: (Role) Contact Relationships: 1. Primary Contact ⇔ Consumer 2. Contact ⇔ Consumer
CONTACT VIEW	Level 1: (Role) Company Level 2: (Role) Contact Relationships: 1. Primary Contact ⇔ Company 2. Contact ⇔ Company
SITE CONTACTS	Level 1: (Role) Site Level 2: (Role) Contact Relationships: 1. Primary Contact ⇔ Site 2. Contact ⇔ Site
SITE VIEW	Level 1: (Role) Company Level 2: (Role) Site Relationships: Company ⇔ Site

Configuring Relationship Views

To configure relationship views, use the Configure Relationship Views (BO_RELVW_CONFIG) component.

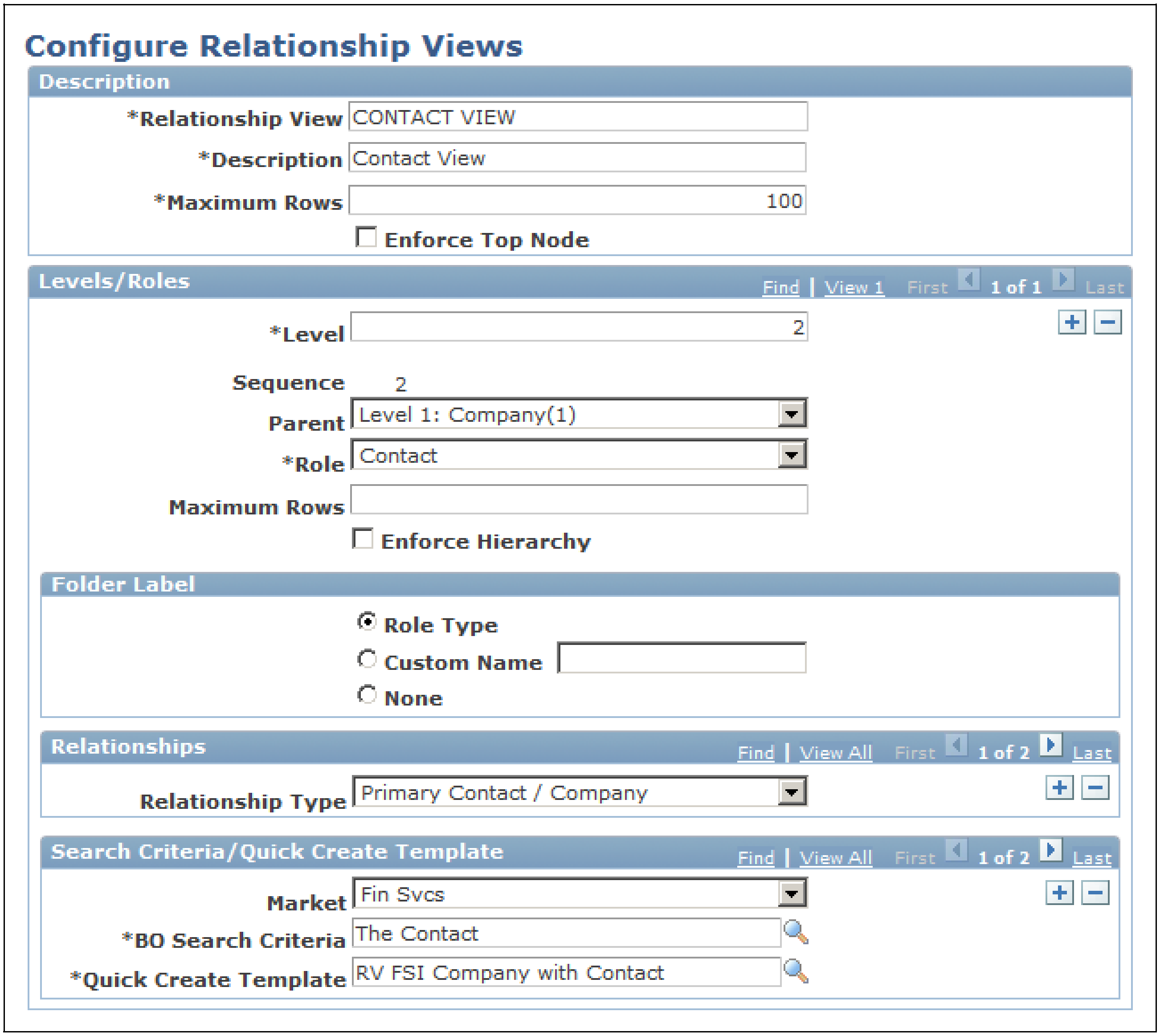
This section discusses how to configure relationship views.

Page Used to Configure Relationship Views

Page Name	***Definition Name***	***Navigation***	***Usage***
Configure Relationship Views	BO_REL_VWCFG	Set Up CRM, Common Definitions, Customer, Configure Relationship Views, Configure Relationship Views	Create relationship views. The relationship view defines the tree that appears in a pane of the Relationship Viewer page.

Configuring Relationship Views

Access the Configure Relationship Views page (Set Up CRM, Common Definitions, Customer, Configure Relationship Views, Configure Relationship Views).



Configure Relationship Views page

Maximum Rows

Enter the maximum number of relationships to display on the Relationship Viewer page for the primary focus business object.

Levels/Roles

The fields that are in the Levels/Roles page region enable you to define the structure of the relationship tree.

Level

Enter the level at which this role and relationship pair appears in the tree.

If you enter a level of *1*, the system removes the Relationships group box from the page and it hides the Parent field.

Parent	Select the parent node for which this role and relationship pair appears in the tree.
Role	Select the role for the node that appears in the tree.
Maximum Rows	Enter the maximum number of relationships to show for this node of the tree on the Relationship Viewer page for the primary focus business object.
Enforce Hierarchy	Select to have business objects that have the same role and are related in a parent-child relationship appear in the proper hierarchy when the user views *Multi Company* or *Customer Hierarchy* relationships.

Folder Label

Use the options that are in the Folder Label group box to control how the relationship tree appears.

Role Type	Select to use Role Type as the folder label on the tree.
Custom Name	Select to use a custom name as the folder label on the tree.
None	Select to have no label appear for the folder on the tree. Use none if you want to suppress adding new relationships of this type.

Relationships

This page region appears only if you select a level other than 1.

Relationship Type	Select the relationship type for this role.

Search Criteria/Quick Create Template

Specify the business object (BO) search criteria or quick create template that is used when you add new relationships in the relationship viewer tree. If you specify a quick create template, the system uses this template and has priority over the BO search criteria. If you do not specify a quick create template, then the system uses the search criteria.

Market	Select the market.
BO Search Criteria	Select a BO search criterion.
Quick Create Template	Select a quick create template.

Note. Using Quick Creation for a new company while establishing a multi-company relationship through relationship viewer is not supported.

Configuring the Relationship Viewer

To configure the relationship viewer, use the Role Priority (BO_REL_PRIOROPT) component.

This section discusses how to:

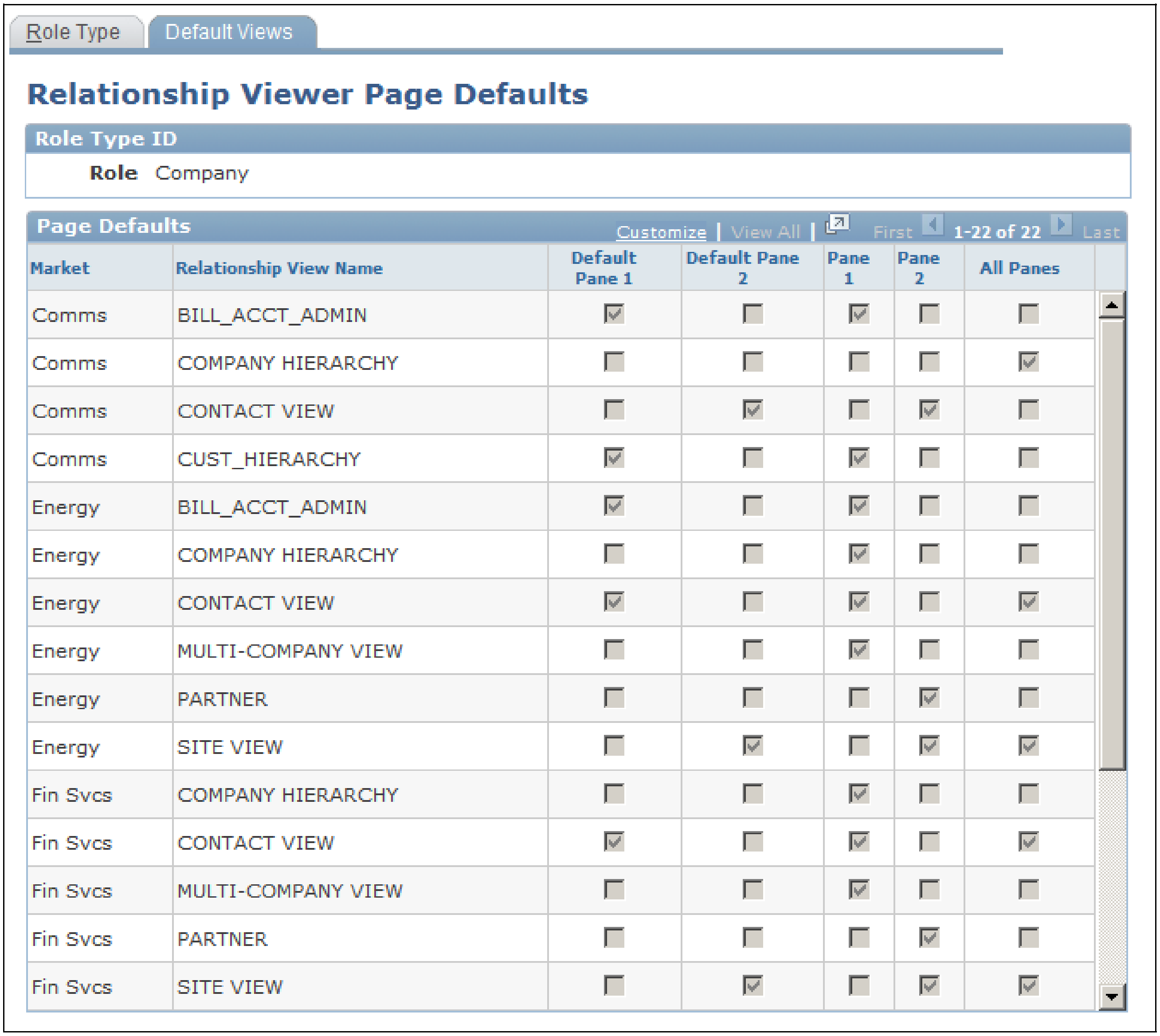
- Define Relationship Viewer page defaults.
- Prioritize roles for the relationship viewer.

Pages Used to Configure the Relationship Viewer

Page Name	*Definition Name*	*Navigation*	*Usage*
Role Type - Default Views	BO_REL_ROLEDFLT	Set Up CRM, Common Definitions, Customer, Role Type, Default Views	Specify the default views that appear in both sections of the Relationship Viewer page and specify the views that are to appear in the Select View list on the Relationship Viewer page. You can use a relationship view in more than one market.
Role Priority - Role Priorities	BO_REL_ROLEPRIORITY	Set Up CRM, Common Definitions, Customer, Role Priority, Role Priorities	Prioritize roles to determine the default relationship views that appear in the relationship viewer.

Defining Relationship Viewer Page Defaults

Access the Role Type - Default Views page (Set Up CRM, Common Definitions, Customer, Role Type, Default Views).



Market	Relationship View Name	Default Pane 1	Default Pane 2	Pane 1	Pane 2	All Panes
Comms	BILL_ACCT_ADMIN	☑	☐	☑	☐	☐
Comms	COMPANY HIERARCHY	☐	☐	☐	☐	☑
Comms	CONTACT VIEW	☐	☑	☐	☑	☐
Comms	CUST_HIERARCHY	☑	☐	☑	☐	☐
Energy	BILL_ACCT_ADMIN	☑	☐	☑	☐	☐
Energy	COMPANY HIERARCHY	☐	☐	☑	☐	☐
Energy	CONTACT VIEW	☑	☐	☑	☐	☑
Energy	MULTI-COMPANY VIEW	☐	☐	☑	☐	☐
Energy	PARTNER	☐	☐	☐	☑	☐
Energy	SITE VIEW	☐	☑	☐	☑	☑
Fin Svcs	COMPANY HIERARCHY	☐	☐	☑	☐	☐
Fin Svcs	CONTACT VIEW	☑	☐	☑	☐	☑
Fin Svcs	MULTI-COMPANY VIEW	☐	☐	☑	☐	☐
Fin Svcs	PARTNER	☐	☐	☐	☑	☐
Fin Svcs	SITE VIEW	☐	☑	☐	☑	☑

Role Type - Default Views page

Relationship View Name Select the relationship view that you want to associate with the role.

Default Pane 1 Select the default view that appears in Pane 1 of the Relationship Viewer page.

Default Pane 2 Select the default view that appears in Pane 2 of the Relationship Viewer page.

Pane 1 Select the views that you want as selection criteria for Pane 1.

Pane 2 Select the views that you want as selection criteria for Pane 2.

All Panes Select the views that you want as selection criteria in both Pane 1 and Pane 2.

Prioritizing Roles for the Relationship Viewer

Access the Role Priority - Role Priorities page (Set Up CRM, Common Definitions, Customer, Role Priority, Role Priorities).

Priority Enter a number in this field next to each role that you want to prioritize. The system uses this field to determine priority. Priority works from lowest number to highest number.

Viewing and Maintaining Relationships and Roles

This section discusses how to:

- View and maintain relationships.
- View and maintain roles.

Pages Used to View and Maintain Relationships and Roles

Note. The Relationship Viewer page and the business object Relationships pages are identical in appearance and use.

Page Name	*Definition Name*	*Navigation*	*Usage*
Relationship Viewer	BO_REL_VIEW	Customers CRM, Relationship Viewer	View and maintain current relationships for a specified business object.
Company - Relationships	RD_COMPANY_REL	Customers CRM, Company, Relationships	View and maintain current relationships for a specified business object.
Consumer - Relationships	RD_PERSON_REL	Customers CRM, Consumer, Relationships	View and maintain current relationships for a specified business object.
Contact - Relationships	RD_PERSON_REL	Customers CRM, Contact, Relationships	View and maintain current relationships for a specified business object.
Site - Relationships	RD_SITE_REL_2	Customers CRM, Site, Relationships	View and maintain current relationships for a specified business object.
Business Object - Relationships	BO_REL	Customers CRM, Business Object, Relationships	View and maintain current relationships for a specified business object.

Page Name	***Definition Name***	***Navigation***	***Usage***
360-Degree View - Relationship Viewer	RB_TD_REL_VIEWER	Click the 360-Degree View from the main menu. Click the Relationship Viewer tab.	View and maintain current relationships for a specified business object.
Create New <relationship> of <object>	BO_REL_VIEW_3	• Click the Add New link on the view detail of the Relationship Viewer page. • Click the Add New link on the view detail of the Relationships page in the Company, Consumer, Site, Contact, or Business Object component.	Add a new relationship.
Relationship Viewer - Update <relationship>	BO_REL_VIEW_2	Click the pen edit button on the view detail of the Relationship Viewer page.	Update the relationship. You can modify the start date or end date for the relationship.
Maintain Roles	MAINTAIN_ROLE_SEC	Click the Maintain Roles link on the Relationship Viewer page or a Relationships page for a component.	Maintain roles for a specified business object.
360-Degree View	RB_TD_AGENT_VIEW	Click the 360-Degree button on the view detail of the Relationship Viewer page.	Access the 360-degree view of the specified business object. See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Using the 360-Degree View."

Viewing and Maintaining Relationships

Access the Relationship Viewer page (Customers CRM, Relationship Viewer) or the Relationships page for any business object (Customers CRM, Company, Relationships; Customers CRM, Consumer, Relationships; Customers CRM, Contact, Relationships; Customers CRM, Site, Relationships; Customers CRM, Business Object, Relationships).

Relationship Viewer page

Role Select the role for which you want to view relationships.

Select View Select a relationship view that you want to appear in the corresponding pane of the page.

The views that appear as selection criteria for this field are defined on the Role Type - Default Views page.

See and Chapter 8, "Working with the Relationship Viewer," Configuring Relationship Views, page 123.

Maintain Roles Click to access the Maintain Roles page for the specified business object.

View Detail

The View Detail page regions show the relationships that are associated with the business object that is selected in a tree format. The default relationship view trees are based on the business object's roles and role priorities.

Click any link that is in the tree to view detail information for that business object. A PeopleSoft CRM Business Object Relationship Model page for the business object type appears in a new browser. For example, if you click a contact link, the Contact - Contact page appears. If you click a site link, the Site - Site page appears.

The icons that appear to the left of the business object detail vary by business object. If no icon is specified for the business object, then a leaf icon appears in the relationship viewer for that business object.

See and Chapter 3, "Defining Control Values for Business Objects," Modifying and Adding Role Types, page 26.

Add New <relationship>

Click to add a new relationship.

The Add New Relationship link appears at the beginning of every node that you configure with a folder label when you configure the relationship view.

If the node is configured with a quick create template, the quick create page appears when the user clicks this link.

See and Chapter 8, "Working with the Relationship Viewer," Configuring Relationship Views, page 124.

If the node is configured with a BO search criteria, the Add New <relationship> page appears.

See and Chapter 8, "Working with the Relationship Viewer," Viewing and Maintaining Relationships and Roles, page 129.

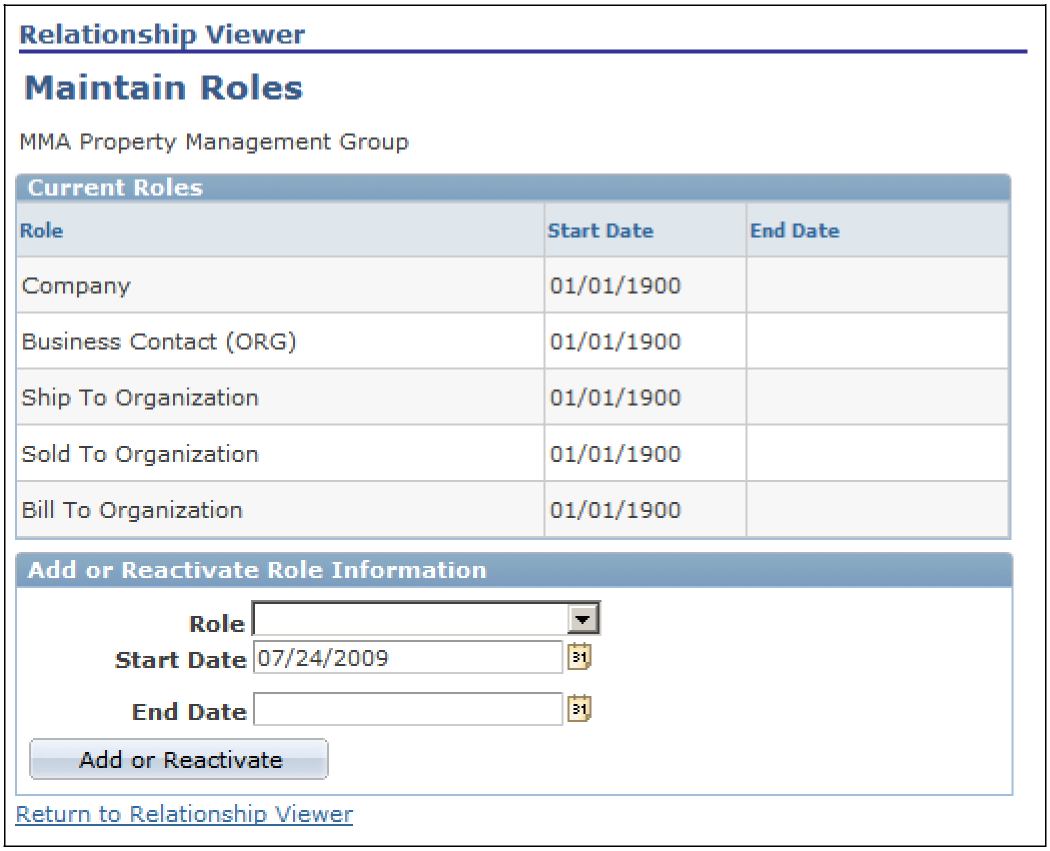
Click to update the relationship.

Click to display the 360-Degree View for the business object in a new browser window.

Note. The 360-Degree button only appears on the tree detail for role types that are supported by the 360-Degree View. See role type category 43 (360 Transfer Roles) for the list of valid role types.

Viewing and Maintaining Roles

Access the Relationship Viewer - Maintain Roles page (click the Maintain Roles link on the Relationship Viewer page or a Relationships page for a component).



Relationship Viewer - Maintain Roles page

When this page initially appears, all the roles that pertain to the specified business object and its start and end dates are listed in the Current Roles group box. Roles that were added by the system do not have an end date. If a user-added role does not have an end date, an Inactivate button appears next to the role.

Inactivate	Click this button to inactivate the role. When you click this button, the Maintain Roles - Inactivate Role page appears. Enter the End Date for this role and then click the OK button.

Add or Reactivate Role Information

Role	Select the role to add or reactivate for this business object.
Start Date and **End Date**	Enter the start and end date that this role is in effect.
Add or Reactivate	Click this button after you select the role and the start and end date to add or reactivate the role that is for the specified business object.

Part 3

Data Management for Organization Business Objects

Chapter 9

Defining Company Business Objects

This chapter provides an overview of the Company component and discusses how to:

- Define company information.
- Define company sites.
- Define company contacts.
- Model corporate hierarchy.

Understanding the Company Component

This section discusses:

- Company information.
- Partner companies.
- Markets.

Company Information

A company is an organization that purchases, leases, or contracts for product or services. In PeopleSoft Customer Relationship Management (PeopleSoft CRM), companies are represented as business objects with an Organization business object type and a Company role type. A record for each company is created in the Company table (RD_COMPANY). Because companies participate in business transactions, a record for the company is also created in the Business Contact table (BC), which enables you to define records for sold-to, bill-to, and ship-to information for the company.

Each company can have one or more addresses that can apply to the company, its sites, or its contacts.

See and Chapter 4, "Defining Name and Address Information for Business Objects," page 51.

Sites

For each company, you can associate sites, the geographic locations of the company where services are performed, or products shipped or installed. Site records are maintained in the Site table (RD_SITE). When you associate a site with a company, a record is inserted in the Business Object Relationship table (BO_REL) to capture the relationship between the site and the company.

Contacts

You can also define the company's contacts: the people who participate in business transactions on behalf of the company. When you define company contacts in PeopleSoft CRM, you can enter contact information for the contact that is specific to his or her role as a contact of the company. Records for contacts are maintained in the Person table (RD_PERSON). When you associate a person with a company or one of the company's sites, a record is created in the Business Object Relationship table to capture the contact relationship between the person and the company.

Note. If you add a contact who is a company employee whose worker information is *secured,* the contact's home phone number, home email address, and home address do not appear. This information is visible in a HelpDesk case when searching for a worker or if the Phone Number or Email Address field is selected in the display template, even if the user does not have a secured role.

Attributes

You can configure the Company component to store installation-specific attributes. Because this is a configuration, attributes that you add are not supported by PeopleSoft CRM. If you choose to configure additional attributes, you can make them visible on the Company component by using permission lists.

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook,* "Setting Up Security and User Preferences," Setting System-Wide Security Options.

Integrations

You can also create and maintain company records in PeopleSoft Supply Chain Management or a third-party system and synchronize the company data with PeopleSoft CRM by implementing the following enterprise integration points (EIPs): the Customer EIP, Customer_Company EIP, Customer_Consumer EIP, Customer_Site, and Customer_Contact EIP.

Partner Companies

You can designate a company as a partner company. Partner companies in PeopleSoft CRM are indirect sales channels that sell, fulfill, and distribute goods and services to customers through indirect sales channels.

See and *PeopleSoft Partner Relationship Management 9.1 PeopleBook.*

Markets

Pages that contain information about a person's financial accounts and bill payees appear only for installations that have licensed PeopleSoft Bill Presentment and Account Management or PeopleSoft Banking Transactions. This visibility is controlled by the market that you specify on the User Preferences page.

See Also

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

PeopleSoft Bill Presentment and Account Management 9.1 PeopleBook, "Oracle's PeopleSoft CRM Bill Presentment and Account Management Preface"

PeopleSoft Banking Transactions 9.1 PeopleBook, "Oracle's PeopleSoft CRM Banking Transactions Preface"

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

Defining Company Information

To define company information, use the Company (RD_COMPANY_2) component.

This section discusses how to:

- Access companies.
- View company summary information.
- Maintain general company information.
- Manage company account teams.
- Manage sales team tasks.
- View call reports.
- View account plans.
- Add notes.
- Manage company contact information.
- Maintain company relationships.
- Maintain company profile data.
- Maintain tax exempt certificate information.

Pages Used to Define Company Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Company Search	RD_COMPANY_GSRCH	Customers CRM, Search Company	Access an existing company.

Page Name	***Definition Name***	***Navigation***	***Usage***
Company - Summary	RD_COMPANY_SUMMARY	Customers CRM, Search Company, Company - Summary: Summary	View summary information about the company.
Company - Details	RD_COMPANY_DETAILS	Customers CRM, Search Company, Company - Summary: Details	Maintain general information about the company.
Company - Purchasing Options	RD_COMPANY_CUST_OP	Customers CRM, Search Company, Company - Summary: Purchasing Info	Maintain the company's purchasing information.
Company - Tax Exempt Certificate	RD_TAX_EXEMPT_COMP	Customers CRM, Search Company, Company - Summary: Tax Exempt Certificate	Maintain the company's tax exempt information.
Company - Account Team	RD_ACCOUNT_TEAM	Customers CRM, Search Company, Company - Account Team	Manage the account team that is assigned to the company.
Company - Tasks	RD_TASK_LIST	Customers CRM, Search Company, Company - Tasks	Manage sales team tasks for a company.
Company - Call Reports	RD_CALLRPT_LST_TXN	Customers CRM, Search Company, Company - Call Reports	View a list of call reports for which the company contacts are named as participants.
Company - Billing Accounts	RBT_COMACT_LIST	Customers CRM, Search Company, Company - Billing Accounts	View a list of billing accounts for the company.
Company - Account Plans	RD_ACCOUNT_PLAN	Customers CRM, Search Company, Company - Plans	View the account plans for the company.
Company - Notes	RD_COMPANY_NOTE_2	Customers CRM, Search Company, Company - Notes	Maintain notes and attachments for the company.
Company - Contact Info	RD_COMP_ADDR_BOOK	Customers CRM, Search Company, Company - Contact Info	Manage company contacts, addresses, and sites.
Company - Relationships	RD_COMPANY_REL	Customers CRM, Search Company, Company - Relationships	Maintain company relationship information.
Company - More Info	RD_PROFILE	Customers CRM, Search Company, Company - More Info	Maintain company profile data.

Page Name	Definition Name	Navigation	Usage
Company - Attributes	RB_ATTR_RUN_COMP	Customers CRM, Search Company, Company - Attributes	Maintain company attributes.

Accessing Companies

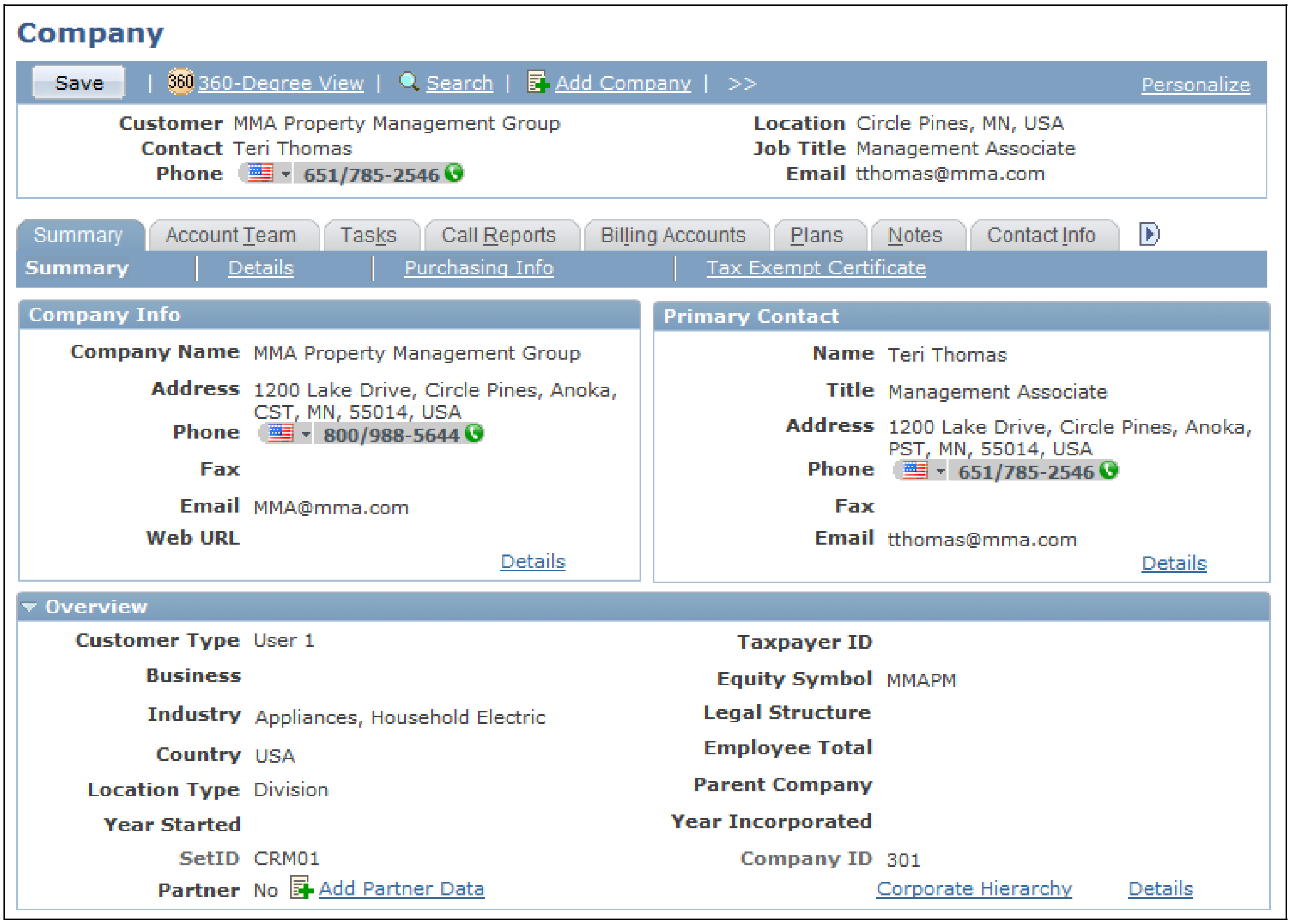
Access the Company Search page (Customers CRM, Search Company).

The appearance, behavior, and personalization options for this page are controlled by the search definition for the Company component.

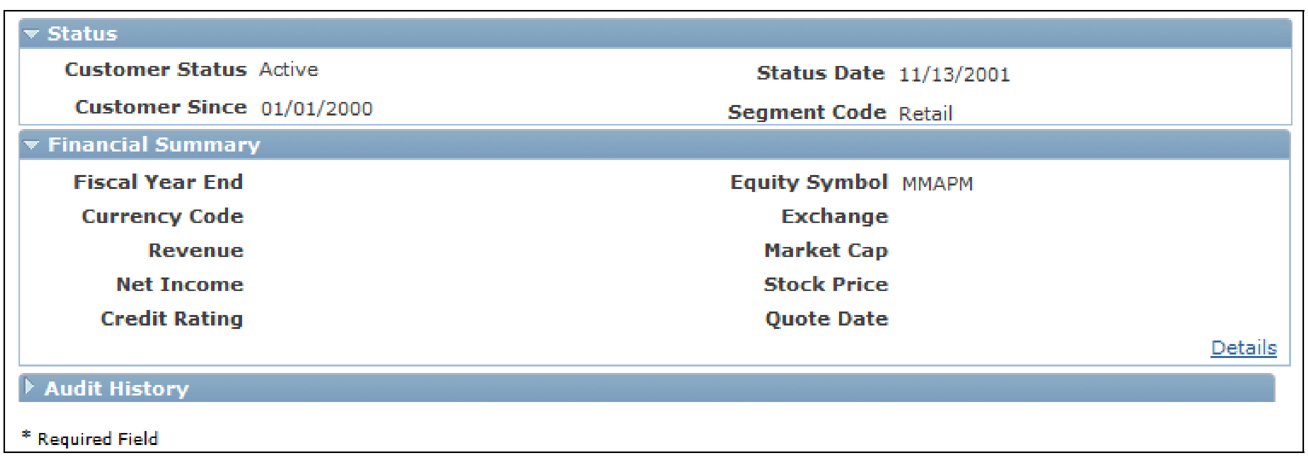
See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook,* "Configuring Search Pages."

Viewing Company Summary Information

Access the Company - Summary page (Customers CRM, Search Company, Company - Summary: Summary).



Company - Summary page (1 of 2)

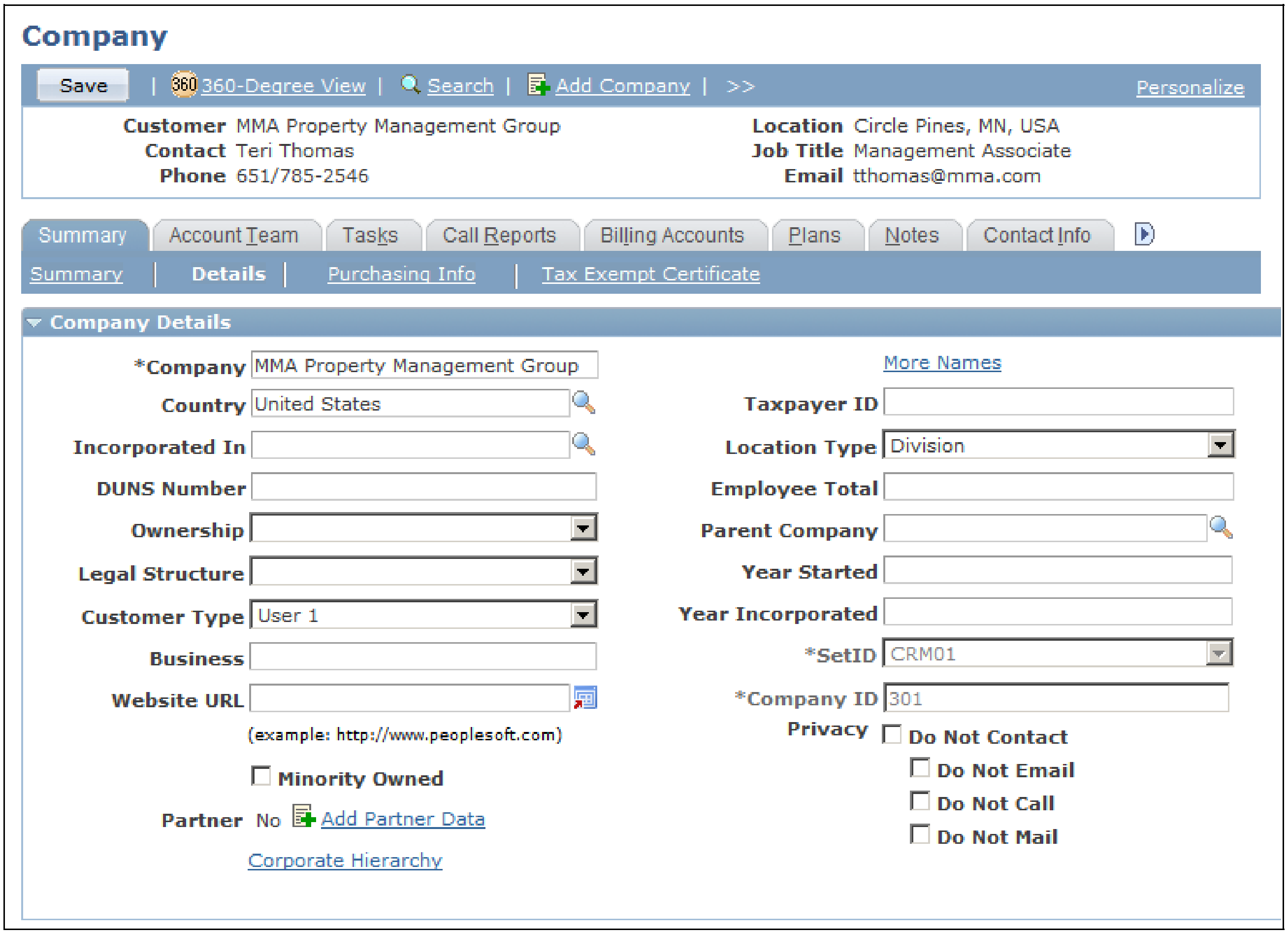


Company - Summary page (2 of 2)

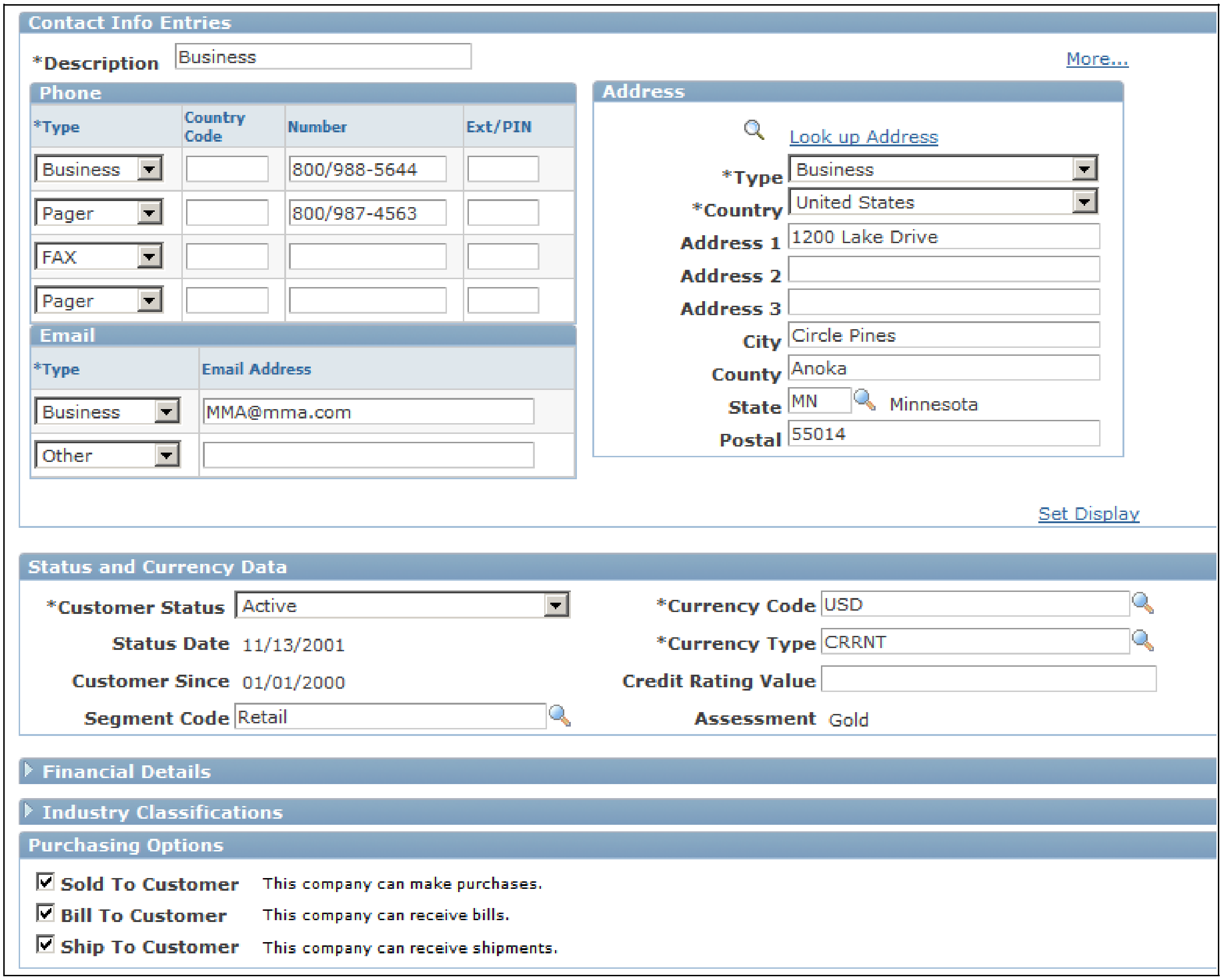
Note. When you click any link (for example, the Details link) on this page that takes you to the Contact Info page but the system finds out that you have no permissions to access the page based on your user login, it aborts the page transfer and generates an error message, explaining the possible cause of the error.

Maintaining General Company Information

Access the Company - Details page (Customers CRM, Search Company, Company - Summary: Details).



Company - Details page (1 of 2)



Company - Details page (2 of 2)

Company Details

Company Name

Enter the company name. By default, the name that you enter here is the primary name for the company. Click the More Names link to add additional names or designate another name as primary.

See and Chapter 4, "Defining Name and Address Information for Business Objects," Updating Name Information, page 55.

Customer Type

Select a customer category for use in reports. You can modify the translate values, *User 1* to *User 4*, to reflect categories that make sense for customer tracking. For example, *User 1* might represent manufacturing customers, *User 2* might represent retail customers, and so on.

Business

Enter the customer's business type.

Location Type

Select a description of the company location. Values are *Branch, Division, Headquarters, Single Location,* and *Subsidiary.*

Parent Company

Enter the name of the parent company. You must establish parent companies in the system before associating them with subsidiaries. When you save the component, the system automatically creates a relationship between the two company business objects.

Click to transfer to the website that is specified in the Website URL field.

Add Partner Data and **Edit Partner Data**

Click the Add Partner Data link to add the Partner role to a company. If the company already has the Partner role, the link text changes to Edit Partner Data.

You transfer to the Partner Company component on which you can view or update partner information.

Corporate Hierarchy

Click to access a hierarchical tree view of selected relationships that are specified for the company in the Corporate Hierarchy component.

Privacy

Select one of these options to indicate the channels for which the company requests stoppage of all unsolicited communications from the business.

Contact Info

Enter contact information for the company.

See and Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Contact Information, page 62.

Status and Currency Data

Customer Status

Select *Active* or *Inactive.*

Customer Since

Enter the date that the company becomes a customer of your business.

Note. If you integrate with PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management, you cannot modify the customer status information and the Customer Since date in PeopleSoft CRM.

Currency Code

Select the code that specifies the currency that you use for a monetary transaction with this company.

Currency Type

Select the exchange rate type that is used to calculate monetary transaction amounts in alternate currencies.

Credit Rating Value

Enter the company's credit rating, if it's known.

Segment Code

Select the company's business segment for marketing purposes.

Assessment Displays the customer's key performance indicator value that is determined by Performance Management.

See and Chapter 2, "Understanding Business Object Relationship Model Components," Customers and Business Contacts, page 9.

Purchasing Options

Indicate which purchasing tasks are valid for the company.

See and Chapter 5, "Defining Purchasing Options for Companies, Consumers, and Sites," page 77.

Sold To Customer, Bill To Customer, and **Ship To Customer** Select if the company can make purchases, receive invoices, or receive shipments.

Managing Company Account Teams

Access the Company - Account Team page (Customers CRM, Search Company, Company - Account Team).

See and *PeopleSoft Strategic Account Planning 9.1 PeopleBook.*

Managing Sales Team Tasks

Access the Company - Tasks page (Customers CRM, Search Company, Company - Tasks).

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

Viewing Call Reports

Access the Company - Call Reports page (Customers CRM, Search Company, Company - Call Reports).

Note. The system only displays call reports that have information associated with the displayed company.

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Working with Call Reports."

Viewing Account Plans

Access the Company - Plans page (Customers CRM, Search Company, Company - Plans).

See and *PeopleSoft Strategic Account Planning 9.1 PeopleBook.*

Adding Notes

Access the Company - Notes page (Customers CRM, Search Company, Company - Notes).

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

Managing Company Contact Information

Access the Company - Contact Info page (Customers CRM, Search Company, Company - Contact Info).

See and Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Contact Information for Business Objects, page 58.

Maintaining Company Relationships

Access the Company - Relationships page (Customers CRM, Search Company, Company - Relationships).

See and Chapter 8, "Working with the Relationship Viewer," page 121.

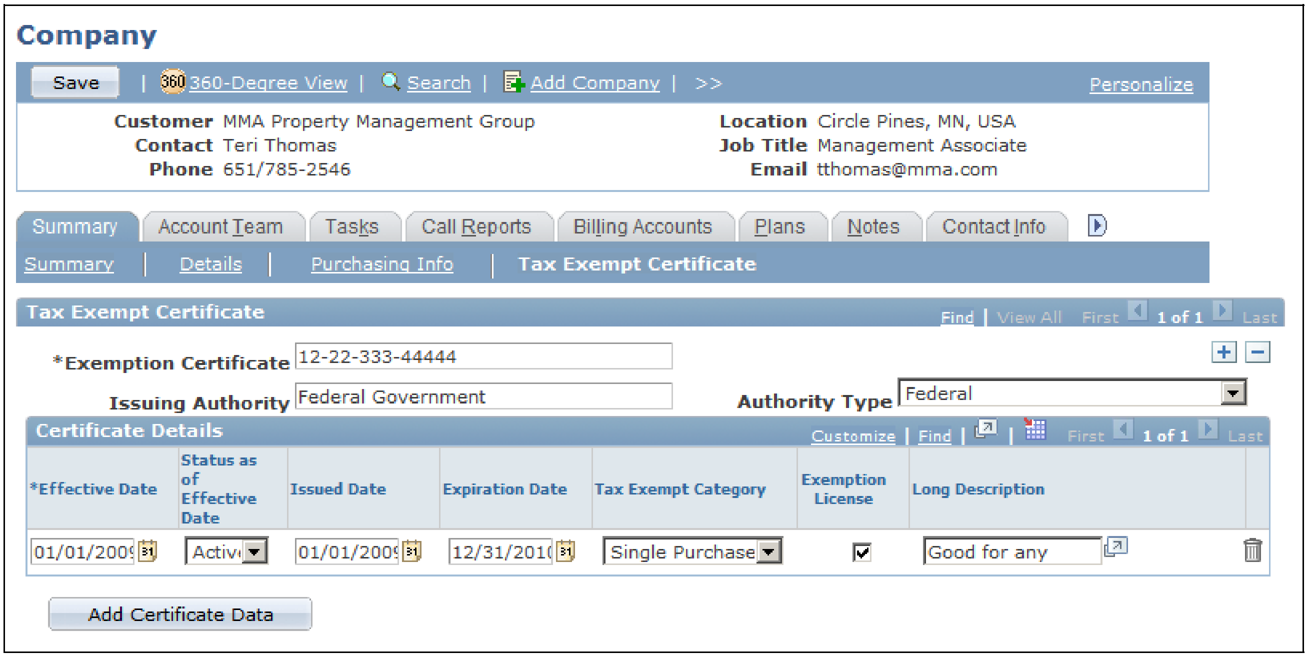
Maintaining Company Profile Data

Access the Company - More Info page (Customers CRM, Search Company, Company - More Info).

See and Chapter 7, "Working with Business Object Profiles," page 91.

Maintaining Tax Exempt Certificate Information

Access the Company - Tax Exempt Certificate page (click the Tax Exempt Certificate link on the Company - Summary page).



Company - Tax Exempt Certificate page

Exemption Certificateand **Issuing Authority**

Enter the details for the tax exempt certificate such as exemption certificate number and issuing authority. Record multiple tax exemption certificates for each customer and select an authority type to classify the issuing authority. For each exemption certificate, enter an effective date, status, issued date, and expiration date.

Authority Type

Enter the authority type for the associated tax exempt certificate. Values are *Europe*,*Federal*,*Local*,*Other*,*State*, and *Transport.*

Status as of Effective Date

Enter the status for the certificate. Values are *Active* and *Inactive.*

Tax Exempt Category

Select the exemption category for which the customer qualifies with this purchase:

- *Blanket*

  Exemption category exists for all purchases of this type.

- *Single Purchase*

  Exemption category exists for the specified purchase only.

- *Other*

  A user-defined exemption category.

Exemption License

Select to denote that a tax-exempt license is issued to the customer.

Add Certificate Data

Select the Add Certificate Databutton to add tax additional certificates.

Defining Company Sites

This section lists the pages used to define company sites.

See Also

Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Sites, page 73

Pages Used to Define Company Sites

Page Name	*Definition Name*	*Navigation*	*Usage*
Company Search	RD_COMPANY_GSRCH	Customers CRM, Search Company	Search for existing companies.
Company - Sites	RD_COMPANY_SITE_2	Customers CRM, Search Company, Company - Contact Info Click the Sites link.	View a list of company sites and add new sites for the company.

Defining Company Contacts

This section lists the pages used to define a company's contacts.

See Also

Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Contacts, page 67

Pages Used to Define Company Contacts

Page Name	*Definition Name*	*Navigation*	*Usage*
Company - Contact Info: Contacts	RD_COMPANY_CNTCT_2	Customers CRM, Search Company, Company, Contact Info Select the Contacts link.	Maintain the list of contacts who represent the company in business transactions.

Page Name	*Definition Name*	*Navigation*	*Usage*
Create Contact of <company>	RBQ_QCREATE	On the Company - Contact Info: Contacts page, click the Add Contact button.	Add a contact to a company.
Modify <contact>	RBQ_QCREATE	On the Company - Contact Info: Contacts page, click the Edit button for any listed contact.	Maintain information for an existing company contact, including purchasing options and contact information.

Modeling Corporate Hierarchy

This section provides an overview of corporate hierarchy and discusses how to:

- View and modify participation percentages.
- Select the role that appears.

Understanding Corporate Hierarchy

The Corporate Hierarchy component enables the user to create and maintain Hierarchical Groupings, including the ability to capture the percent ownership of each child to its parent.

The Corporate Hierarchy link is on the Company Summary and Company Details pages of the Company component. The Corporate Hierarchy link is only visible when a Company participates in Hierarchical Relationship(s). The following Relationship Types are currently considered hierarchical:

Relationship Type ID	*Description*
4	Company / Site
17	Consumer / Site
18	Parent Company / Company
94	Manager / Reports to
333	Board of Directors
20008	Person / Son/Daughter
20010	Parent / Child
20015	School / Student
20015	Personal Banker / Client

Understanding Corporate Hierarchy Participation Percentages

The Corporate Hierarchy component enables you to view the list of sites or contacts that compose a customer company and assign a participation percentage to each. For example, if a customer company has three contacts, *Larry Hill,Stu Marx,* and *Sandra Thomas,*, you might assign participation percents as follows:

Contact	***Percent***
Larry Hill	40
Stu Marx	20
Sandra Thomas	40

You can view and assign participation only to the first dependent level in the hierarchy: to the sites and contacts that are directly associated with a company.

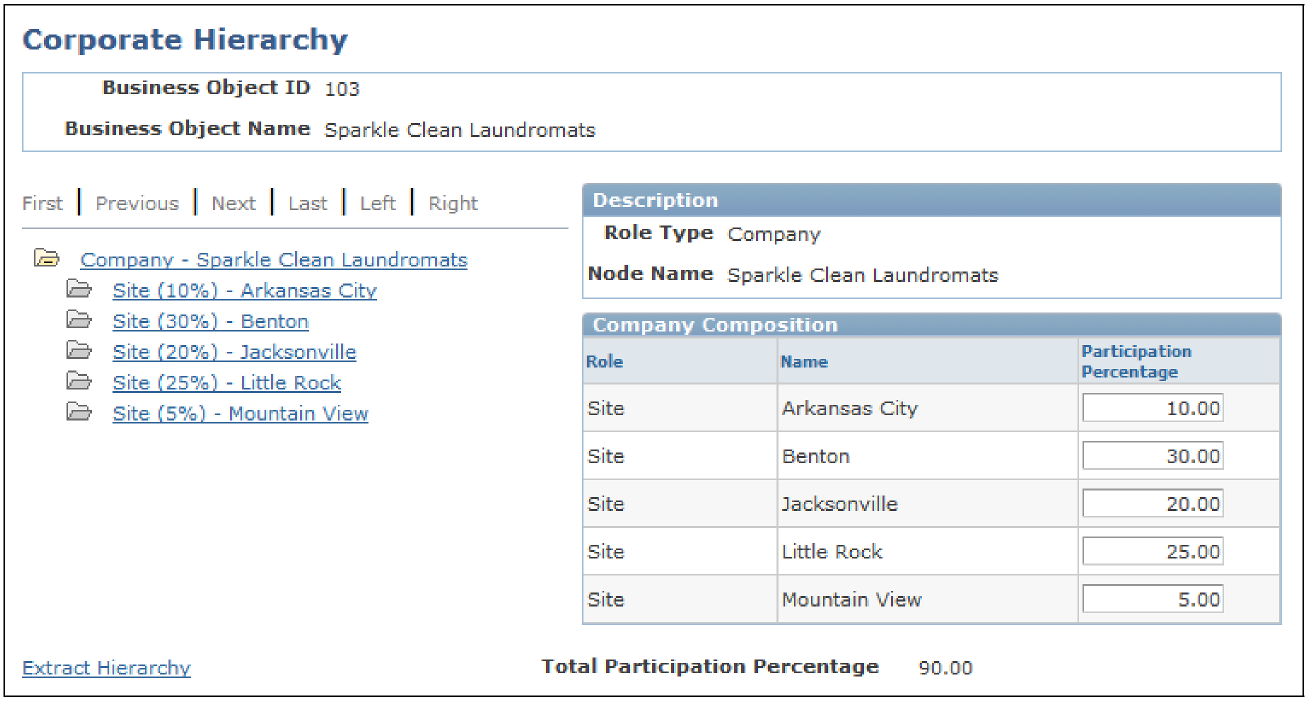
A parent may have multiple children, and each child is some percentage of its parent. The sum of all percentages for a given parent shall be less than or equal to 100%. This percentage is called ownership.

Pages Used to Model Corporate Hierarchy

Page Name	***Definition Name***	***Navigation***	***Usage***
Corporate Hierarchy	RB_HIER_GRP_BUILD	• Customers CRM, Corporate Hierarchy • Customers CRM, Search Company Click the Corporate Hierarchy link on the Summary page.	View and modify the participation percentage of objects in the corporate hierarchy. **Note.** The Corporate Hierarchy link appears only if a hierarchy exists.
Corporate Hierarchy: Extract Hierarchy	RB_HIER_GRP_ROLES	Click the Extract Hierarchy link on the Corporate Hierarchy page.	Select roles for the hierarchy.

Viewing and Modifying Participation Percentages

Access the Corporate Hierarchy page (Customers CRM, Corporate Hierarchy).



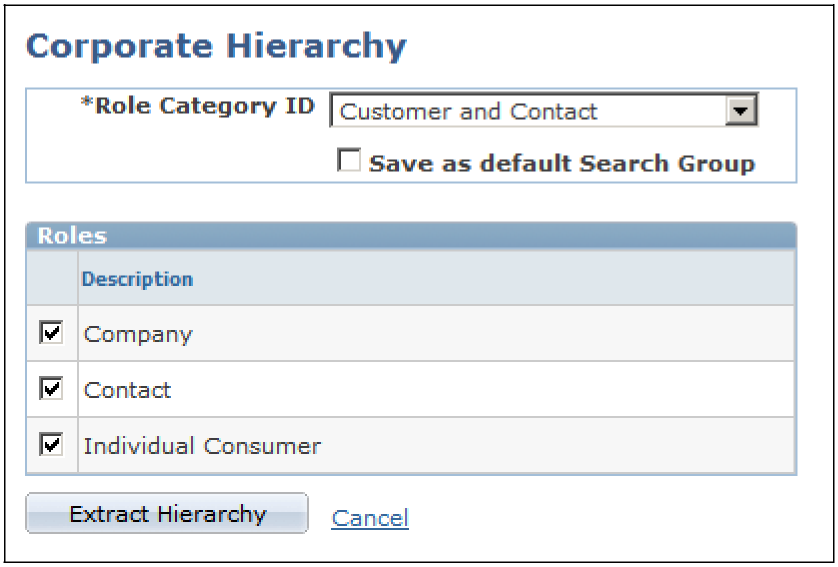
Corporate Hierarchy page

Participation Percentage Enter the percentage of activity that each business unit contributes.

Extract Hierarchy Click to modify the roles that appear.

Selecting the Role that Appears

Access the Corporate Hierarchy: Extract Hierarchy page (click the Extract Hierarchy link on the Corporate Hierarchy page).



Corporate Hierarchy: Extract Hierarchy page

Role Category ID

Select from various types of hierarchies. This field controls the roles from which you can select.

Save as default Search Group

Select to save the role selections as the default.

Roles

Select roles to appear in the hierarchy.

Extract Hierarchy

Click to return to the parent Corporate Hierarchy page and view the hierarchy you selected.

Chapter 10

Defining Site Business Objects

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

- Set up site types.
- Maintain general site information.
- Maintain site contacts.
- Define site relationships.

Understanding Sites

Sites in CRM are:

- Customers that are represented by contacts.
- Always associated with a company or a consumer business object.

  Note. Sites can be used independently for the energy industry.

- Places where products are shipped or installed.
- Places where services are performed.

In the customer data model, sites are represented as organization type business objects with a role type of site. A record for each customer site is created in the Site table (RD_SITE), and a record for the association between a site and a company or consumer is inserted in the Business Object Relationship table (BO_REL). Because the site that is associated with a customer can participate in business transactions, a record for the site is also created in the Business Contact table (BC), which enables you to specify sold-to, bill-to, and ship-to purchasing options for the site.

Site contacts are Person business objects and are also contacts of the company or consumer that is associated with the site. When you associate a person with a customer site, the person is assigned a role type of contact for both the site and the customer with whom the site is associated. Two records are inserted in the Business Object Relationship table (BO_REL): one record to capture the relationship between the person and the site and one record to capture the relationship between the person and the customer who is associated with the site.

You can publish customer site information to PeopleSoft Supply Chain Management (PeopleSoft SCM) by using the following Customer_Site EIP. However, because PeopleSoft Supply Chain Management does not have a site concept, site records are created as customer records in the PeopleSoft Supply Chain Management system. Customer records in PeopleSoft SCM are created only for sites that are flagged as either sold-to or bill-to sites in CRM.

See Also

Chapter 2, "Understanding Business Object Relationship Model Components," Customers and Business Contacts, page 9

Chapter 11, "Defining Person Business Objects," Defining Information for Business Contacts, page 184

Chapter 4, "Defining Name and Address Information for Business Objects," page 51

Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," page 343

PeopleSoft 9.1 PeopleBook: Enterprise Components

Setting Up Site Types

To set up site types, use the Site Type (RD_SITE_TYPE) component.

This section discusses how to set up site types.

Page Used to Set Up Site Types

Page Name	***Definition Name***	***Navigation***	***Usage***
Site Type	RD_SITE_TYPE	Set Up CRM, Common Definitions, Customer, Site Type	Define codes that you use to categorize sites. Site type IDs must be unique for the specified set ID.

Maintaining General Site Information

To maintain general site information, use the Site (RD_SITE_2) component.

This section discusses how to:

- Maintain primary site information.
- Maintain site names.
- Maintain site purchasing options.
- Maintain site contact information.
- Add notes and attachments.

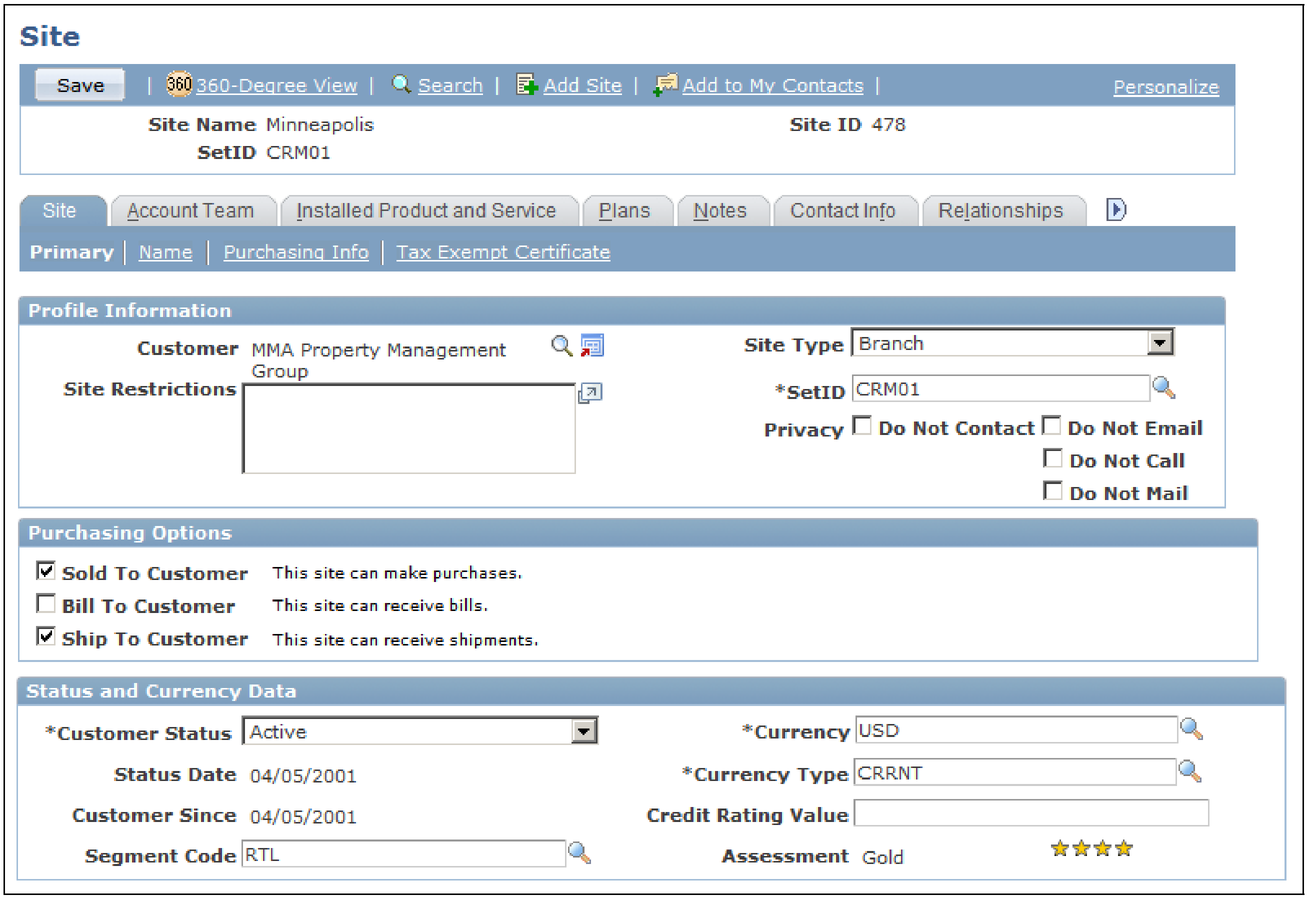
Pages Used to Maintain General Site Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Search Site	RD_SITE_GSRCH	Customers CRM, Search Site	Search for existing sites.
Site - Site: Primary	RD_SITE_MAIN_2	• Customers CRM, Add Site • Customers CRM, Search Site, Site - Site: Primary	Maintain primary site information
Site - Site: Name	RD_SITE_NAME_PG	Customers CRM, Search Site, Site - Site: Name	Maintain site names. Designate a primary site name.
Site - Site: Purchasing Info (purchasing information)	RD_SITE_CUST_OP_2	Access the Site - Site: Primary page. Click the Purchasing Info (purchasing information) link.	Maintain purchasing information for the site.
Site - Site: Tax Exempt Certificate	RD_TAX_EXEMPT_SITE	Access the Site - Site: Primary page. Click the Tax Exempt Certificate link.	Maintain tax exempt information for the site.
Site - Account Team	RD_ACCOUNT_TEAM	• Customers CRM, Search Site, Account Team • Customers CRM, Add Site, Account Team	View and modify the account team that is assigned to a site.
Site - Contact Info	ABE_LIST	• Customers CRM, Search Site, Contact Info • Customers CRM, Add Site, Contact Info	Maintain contact information for a site, including addresses, phone numbers, and email information.
Site - Contacts	RD_SITE_CNTCT_2	Access the Contact Info page for a site. Click the Contacts link.	Maintain site contacts.

Page Name	*Definition Name*	*Navigation*	*Usage*
Site - Plans	RD_ACCOUNT_PLAN	• Customers CRM, Search Site, Plans • Customers CRM, Add Site, Plans	View and modify the account plan for a site.
Site - Notes	RD_SITE_NOTE_2	Customers CRM, Add Site, Notes Customers CRM, Search Site, Notes	Add notes and attachments for the specified site.
Site - Attributes	RB_ATTR_RUN_SITE	Customers CRM, Add Site, Attributes Customers CRM, Search Site, Attributes	View attributes for the site.

Maintaining Primary Site Information

Access the Site - Site: Primary page (Customers CRM, Search Site, Site - Site: Primary).



Site -Site: Primary page

Note. This example page does not show the page regions for entering contact information. Those page regions function similarly to the ones that appear on the Company component.

Name

This page region appears when you add a site. When you subsequently access the site, you must click the Name link to edit site name information.

See and Chapter 4, "Defining Name and Address Information for Business Objects," page 51.

Profile Information

The fields in this page region provide basic information about the site.

Customer

Displays the primary name of the customer with whom the site is associated. Click the transfer button to access the customer's primary information.

Site Type

Select the site type. Site types are established on the Site Types page.

See and Chapter 10, "Defining Site Business Objects," page 155.

Site Restrictions Enter comments about any restrictions for the site.

Privacy Select the appropriate privacy options for the site.

Purchasing Options

Select the purchasing options to enable for this site. Use the Purchasing Info page to enter detail about the selected purchasing options.

See and Chapter 5, "Defining Purchasing Options for Companies, Consumers, and Sites," Defining Purchasing Options for Customers, page 78.

Status and Currency Data

Customer Status Select *Active* or *Inactive.*

Customer Since Enter the date that the site became a customer for your business.

Note. If you are integrated with PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management, you cannot modify the customer status information and the customer since date in CRM.

Currency Code Select the code that specifies the currency that you use for a monetary transaction with this site.

Currency Type Select the exchange rate type that you use to calculate monetary transaction amounts in alternate currencies.

Segment Code Select the site's business segment for marketing purposes.

Assessment Displays the key performance indicator value as determined by PeopleSoft Enterprise Performance Management.

Contact Info

The primary site address, phone, and email information appear in this page region. To view and edit detail information or additional addresses, click the More link or access the Address Book page.

See and Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Contact Information for Business Objects, page 58.

Maintaining Site Names

Access the Site - Site: Name page (Customers CRM, Search Site, Site - Site: Name).

See and Chapter 4, "Defining Name and Address Information for Business Objects," page 51.

Maintaining Site Purchasing Options

Access the Site - Site: Purchasing Info (purchasing information) page (access the Site - Site: Primary page, then click the Purchasing Info [purchasing information] link).

See and Chapter 5, "Defining Purchasing Options for Companies, Consumers, and Sites," Defining Purchasing Options for Customers, page 78.

Maintaining Site Tax Exempt Certificate Information

Access the Site - Site: Tax Exempt Certificate page (access the Site - Site: Primary page, then click the Tax Exempt Certificate link).

See and Chapter 9, "Defining Company Business Objects," page 137.

Maintaining Site Contact Information

Access the Site - Contact Info page (Customers CRM, Search Site, Contact Info).

See and Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Contact Information for Business Objects, page 58.

Adding Notes and Attachments

Access the Site - Notes page (Customers CRM, Add Site, Notes).

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

Maintaining Site Contacts

This section discusses how to maintain site contacts.

See and Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Contacts, page 67.

Pages Used to Define Site Contacts

Page Name	*Definition Name*	*Navigation*	*Usage*
Site - Contacts	RD_SITE_CNTCT_2	• Customers CRM, Add Site, Site, Contact Info Click the Contacts link. • Customers CRM, Search Site, Site, Contact Info Click the Contacts link.	Maintain site contacts.
Add Contact	RD_REP_ADD_SRCH	Access the Contacts page for a site. Click the Add Contact button.	Add a contact of a site.
Maintain Contact	RBQ_QCREATE	Access the Contact Summary page for a site. Click the Edit button next to a listed contact.	Maintain purchasing options and contact information entries for a contact of a company, consumer, partner company, or site.

Defining Site Relationships

Access the Site - Relationships page (Customers CRM, Site, Relationships).

See and Chapter 8, "Working with the Relationship Viewer," page 121.

Viewing Installed Products and Services for a Site

This section discusses how to view installed products and services for a site.

Pages Used to View Installed Products and Services for a Site

Page Name	***Definition Name***	***Navigation***	***Usage***
Site - Installed Product and Service	RD_SITE_INSTPROD	• Customers CRM, Add Site, Site Select the Installed Product and Service tab. • Customers CRM, Search Site, Site Select the Installed Product and Service tab.	View installed products for a site. **Note.** A site can have either the Installed Products or the Installed Services tab, but not both.

See Also

PeopleSoft CRM 9.1 Product and Item Management PeopleBook, "Tracking Installed Products"

Part 4

Data Management for Individual Business Objects

Chapter 11

Defining Person Business Objects

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

- Configure the Person component.
- Define person information.
- Define business contact information.
- Define consumer information.
- Define person of interest information.

Understanding Persons

This section discusses:

- Sources of person information.
- Persons.
- Consumers and contacts.
- Workers.
- Persons of interest.

Sources of Person Information

A person in PeopleSoft CRM is created in two ways: either by data entry within a CRM component or by integration with a human resources (HR) system. To avoid unnecessary data redundancy and to maintain data integrity, person data often originates in the HR system and is imported into CRM using enterprise integration points (EIPs) to automatically synchronize data updates between systems. These EIPs are available for person data: CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and WORKER.

See Also

Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," page 343

Persons

A person in CRM has one or more of these roles: contact, consumer, worker, or person of interest. Persons with these roles are represented as business objects of the Individual type. CRM stores these business objects in the Person table (RD_PERSON).

Common information is stored for the person and additional information is stored for each specific role that the person has. You can configure the role-specific pages that appear when you initially access the Person component. The contact role pages appear by default. You can add or edit information for other roles that apply to the same person by clicking the appropriate link on the Summary page of the Person component. For example, the Edit Worker Information link enables you to edit information that pertains to the person in the Worker role.

Common Person Information

This information is available for all person roles:

- Name.

  See and Chapter 4, "Defining Name and Address Information for Business Objects," Understanding Name and Address Information in CRM, page 51.

- Contact information.

  See and Chapter 4, "Defining Name and Address Information for Business Objects," Contact Information on CRM Components, page 53.

- User-defined fields.

  User-defined fields provide the flexibility for you to define and enter additional person information that is not provided when you receive the product.

- Details information.

  This information identifies details about a person, such as a driver's license number, preferred contact methods, and privacy flags.

- User profiles.

  User profiles include the person's user IDs, roles, and system permissions.

  See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook,* "Setting Up Security and User Preferences."

- Contact Info.

  See and Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Contact Information for Business Objects, page 58.

- Notes.

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

- More information.

  See and Chapter 7, "Working with Business Object Profiles," page 91.

Markets

Pages that contain information about a person's financial accounts and bill payees appear only for installations that have licensed PeopleSoft Bill Presentment and Account Management or PeopleSoft Banking Transactions. This visibility is controlled by the market that you specify on the User Preferences page.

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up Security and User Preferences," Defining Overall Preferences.

Attributes

You can configure the Person component to store installation-specific attributes. Because this is a configuration, attributes that you add are not supported by CRM. If you choose to configure additional attributes, you can make them visible on the Person component by using the Configure Person Component page.

See and Chapter 11, "Defining Person Business Objects," Configuring the Person Component, page 171.

See Also

Chapter 2, "Understanding Business Object Relationship Model Components," page 7

PeopleSoft Bill Presentment and Account Management 9.1 PeopleBook, "Oracle's PeopleSoft CRM Bill Presentment and Account Management Preface"

PeopleSoft Banking Transactions 9.1 PeopleBook, "Oracle's PeopleSoft CRM Banking Transactions Preface"

Consumers and Contacts

Much of the information that appears in the Person component for consumers and contacts is similar. Both consumers and contacts perform the same activities: purchasing, leasing, or contracting for products or services. The difference is that consumers are customers and act on their own behalf, whereas contacts act on behalf of a customer or customer site.

In CRM, consumers are represented as person business objects with a business object type of Individual and a role type of Individual Consumer. Consumer records are maintained in the Person table. Because consumers participate in business transactions, a record for each consumer is also created in the Business Contact (BC) table, which enables you to define records for sold-to, bill-to, and ship-to information for the consumer.

Contacts are represented as business objects with a business object type of Individual and a role type of Contact. When a person is added to the system as a contact, a record for the person is inserted in the Person table. When the person is associated with a company, consumer, or site, a record is inserted in the Business Object Relationship (BO_REL) table to capture the relationship between the person and the company, consumer, or site. In addition to maintaining contact information for the Contact role, you can also maintain a separate set of contact information for a particular relationship for a contact (such as postal and email addresses and telephone and pager numbers) for each company, consumer, and site relationship. This information is used to contact the person when you are performing the contact role for a specific customer or site.

Contact and Consumer Information

This information is available for both consumers and contacts:

- National ID.

  See and Chapter 3, "Defining Control Values for Business Objects," Defining National ID Types, page 43.

- Credit cards.
- Tasks.

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

- Call reports.

  See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Working with Call Reports," Working with Call Reports.

- Relationships.

  See and Chapter 8, "Working with the Relationship Viewer," page 121.

Consumer-Specific Information

This information is available for consumers only:

- Purchasing options.

  See and Chapter 5, "Defining Purchasing Options for Companies, Consumers, and Sites," page 77.

- Status and currency data.

  See and Chapter 2, "Understanding Business Object Relationship Model Components," Customers and Business Contacts, page 9.

- Tax exempt certificates.
- Account team and plans.

  See and *PeopleSoft Sales 9.1 PeopleBook*, "Working with Customer Accounts," Managing Customer Accounts.

- Contacts.

  You can associate contacts with a consumer. When you associate a contact with a consumer or one of the consumer's sites, a record is created in the Business Object Relationship table to capture the contact relationship between the contact and the consumer.

- Sites.

  Sites are the geographic locations where services are performed or products are sent. Site records are maintained in the Site (RD_SITE) table. When you associate a site with a consumer, a record is inserted in the Business Object Relationship table to capture the relationship between the site and the consumer.

- Employment history and verification.

Contact-Specific Information

The Customers page is available only for persons with the contact role only.

Workers

A worker is any person who performs work for your organization, including employees and contractors. Worker information is used by the Support, HelpDesk, and Field Service applications and includes job detail and information that is used to manage worker assignment on service orders.

See Also

Chapter 12, "Defining Workers," page 191

PeopleSoft CRM 9.1 Call Center Applications PeopleBook, "Oracle's PeopleSoft CRM Call Center Applications Preface"

Persons of Interest

A person of interest (POI) does not fit into either the contact, consumer, or worker categories, but is someone for whom your organization needs to maintain data. For example, you might consider pension payees, board members, or external students as POIs. The only required information for a POI is name, contact information, and POI type. Optionally, you can create a user profile for POIs.

POIs might also have job information if they originate in PeopleSoft HCM. If the POI is created by integration with HCM and does contain a job record, this data is stored in CRM and the user can view but not modify it. If a POI is created online in CRM, a job record cannot be created. Job information is not used for processing transactions within CRM, but, if available, it appears on the 360 Degree View pages.

Only basic person pages and not contact- or consumer-specific pages are available for a POI.

Configuring the Person Component

This section discusses how to

- Select the Person default role.
- Define POI types.

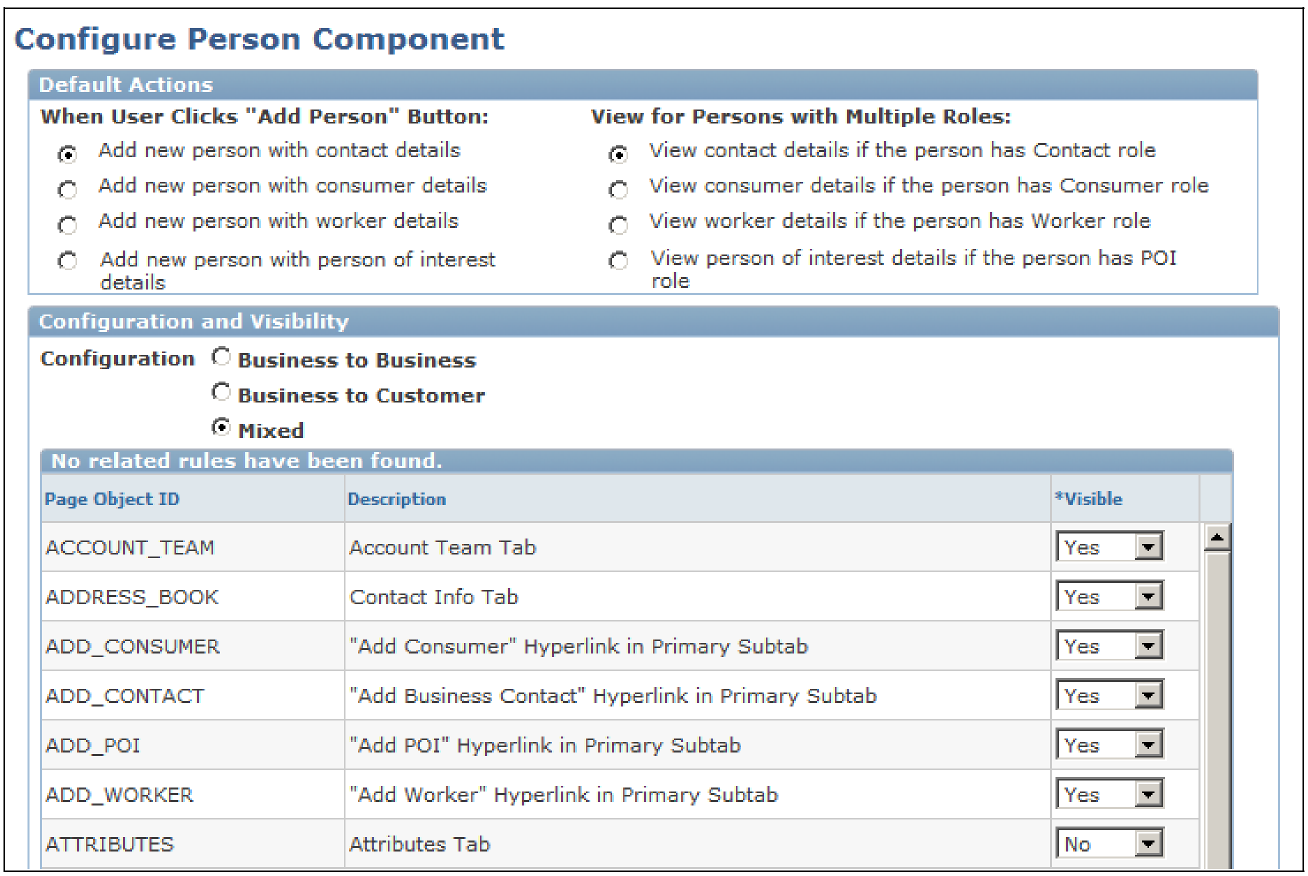
To define a person of interest type, use the Person of Interest Type (POI_TYPE_TBL) component.

Pages Used to Configure the Person Component

Page Name	***Definition Name***	***Navigation***	***Usage***
Configure Person Component	RD_PERSON_CONFIG	Set Up CRM, Common Definitions, Customer, Configure Person Component	Select the default role and the pages that appear in the Person component when a user adds a person or views a person.
Person of Interest Type	POI_TYPE_TBL	Set Up CRM, Common Definitions, Customer, Person of Interest Type, Person of Interest Type	Define the valid POI types.

Selecting the Person Default Role

Access the Configure Person Component page (Set Up CRM, Common Definitions, Customer, Configure Person Component).



Configure Person Component page

Default Actions

Select the role that is added when a user selects Add Person from the menu and the role that appears when a user selects an existing person.

Configuration and Visibility

Business to Business, Business to Customer, and **Mixed**

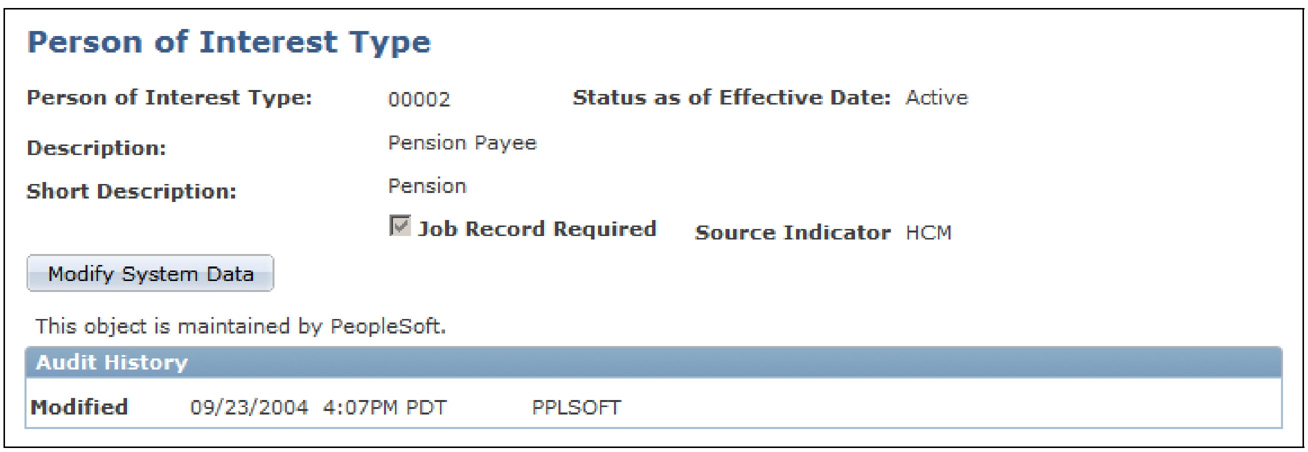
Select an option to indicate whether the CRM installation supports business-to-business, business-to-consumer, or both. The option that you select determines the default page object settings.

Visible

Select *Yes* to have the selected page or link appear on the Person pages that appear to the user.

Defining POI Types

Access the Person of Interest Type page (Set Up CRM, Common Definitions, Customer, Person of Interest Type, Person of Interest Type).



Person of Interest Type page

Job Record Required

Select if job data is required when POI records of this type are brought into CRM by integration with another system. For records that originate in the CRM system, the system clears this check box.

Source Indicator

Select the source of POIs of this type. Value are: *CRM*,,*External*,*HRMS*, and *SCM*..

Modify System Data

Click to modify the POI definition. The button label then changes to Stamp System Data. Click Stamp System Data to record changes and flag the definition as changed.

Defining Person Information

To define person information, use the Person (RD_PERSON) component.

This section discusses how to:

- View and update primary person information.
- View and update person details.
- Maintain user information.
- Maintain credit card information.
- Maintain sales team tasks for a person.
- Access call reports for a person.
- Access notes and attachments for a person.
- Access billing accounts.
- Maintain contact information for a person.
- View and update person relationships.
- View and update person profile information.

Note. The search page that is used to access person records has two versions, depending on whether the user can view secured worker data. This setting is controlled by permission lists.

See Also

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

Pages Used to Define Person Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Person Search	RD_PRSN_SRCH	Customers CRM, Search Person	Search for an existing person. This search page appears only for users who can view a worker's secured information.

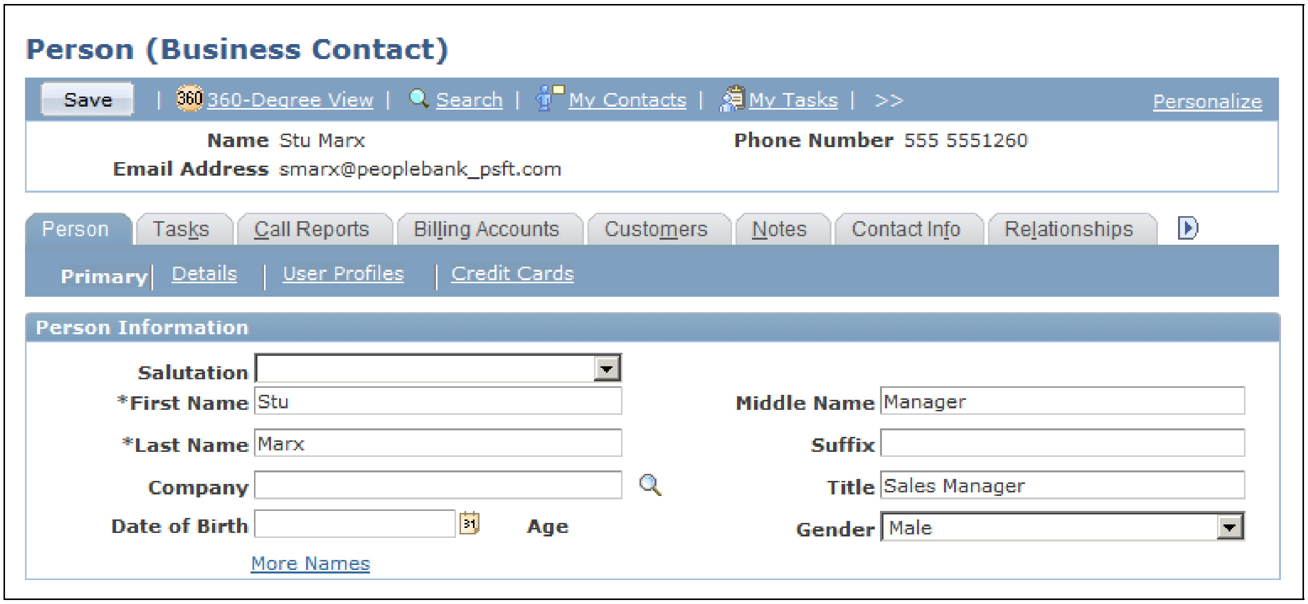
Page Name	***Definition Name***	***Navigation***	***Usage***
Person (<Role>) - Person: Primary	RD_PRSN_PRIMARY	• Select an existing person on the Person Search page. Click the Primary link. • Customers CRM, Add Person Click the Primary link.	View and update primary (most important and frequently accessed) person information and select the person role to access. As delivered, the *Business Contact* role appears by default.
Person (<Role>) - Edit Labels for User Defined Fields	RD_PRSN_UDF_L_EDIT	Click the Edit User Defined Field Labels link on the Person - Primary page.	Modify the system-defined labels that appear for user-defined fields.
Person (<Role>) - Person: Details	RD_PRSN_DETAILS	Click the Details link on the Person page.	View and update person details.
Person (<Role>) - Person: User Profiles	RD_PERSON_USER	Click the User Profiles link on the Person page.	Maintain user information for a person who is permitted to access the online system.
Person (<Role>) - Credit Cards	PD_PERSON_CC	Click the Credit Card link on the Person page.	Maintain the customer or contact credit card information.
Person (<Role>) - Tasks	RD_TASK_LIST	Select the Tasks tab on any page in the Person component.	Maintain sales team tasks for contacting a consumer or contact.
Person (<Role>) - Call Reports	RD_PRSN_CALL_RPTS	Select the Call Reports tab on any page in the Person component.	Access call reports for a person.
Person (<Role>) - Billing Accounts	RBT_ACCOUNT_PG	Select the Billing Accounts tab on any page in the Person component.	Access a person's billing account.
Person (<Role>) - Contact Info	RD_PRSN_ADDR_BOOKS	Select the Contact Info tab on any page in the Person component.	Maintain contact information for a person.
Person (<Role>) - Relationships	RD_PERSON_REL	Select the Relationships tab on any page in the Person component.	View and update the person's relationships with other business objects.
Person (<Role>) - More Info (person - more information)	RD_PROFILE	Select the More Info tab on any page in the Person component.	View and update a person's marketing profile data.

Viewing and Updating Primary Person Information

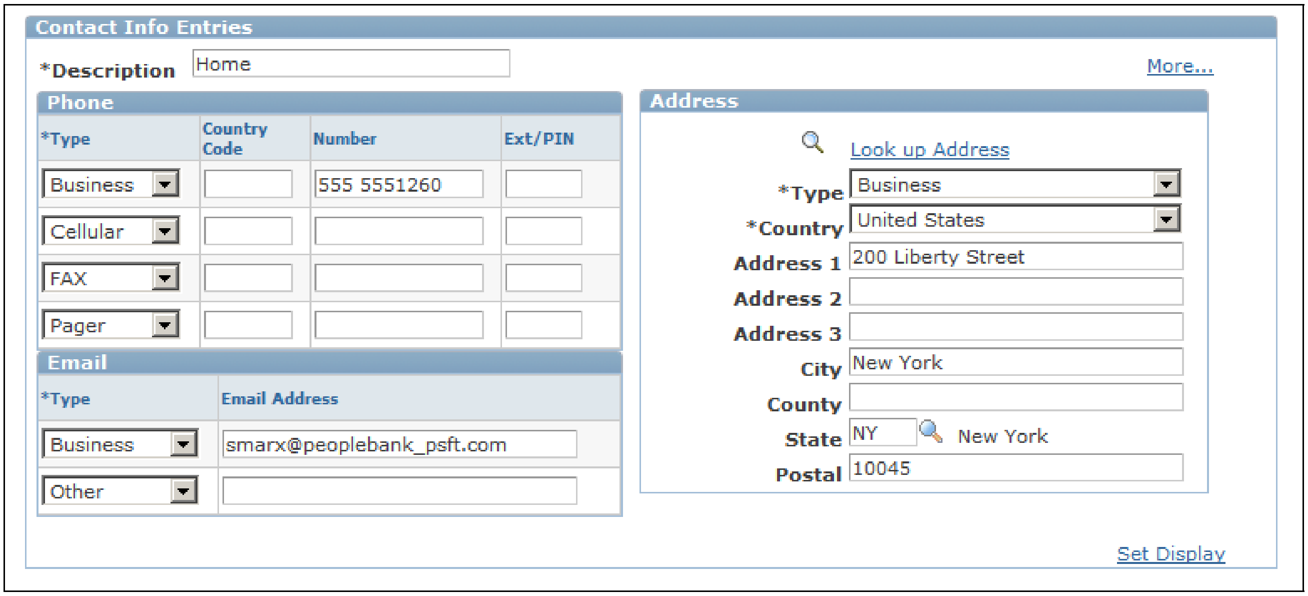
Access the Person (<Role>) - Person: Primary page.

Note. Access the Person (<Role>) - Person: Primary page (select an existing person on the Person Search page and click the Primary link; or access Customers CRM, Add Person, and click the Primary link).

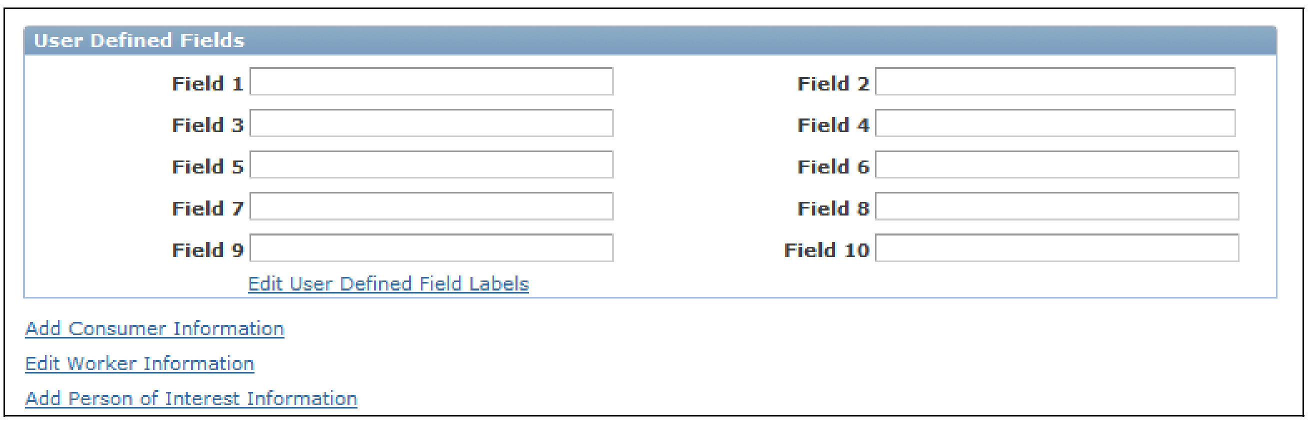
The Person component is used to enter and maintain persons with the Business Contact, Consumer, or Person of Interest roles. The specific role with which you are working is noted with the (<Role>) label in the page title; for example, *Person (Business Contact).*



Person (<Role>) - Person: Primary page (1 of 3)



Person (<Role>) - Person: Primary page (2 of 3)



Person (<Role>) - Person: Primary page (3 of 3)

When you first access this page in add mode, the page is titled Person (Business Contact). When you access information for an existing person who either has the Contact role only or both the Contact and Consumer roles, the page is titled Person (Business Contact). The page is titled Person (Consumer) if you are viewing information for a person who has only the Consumer role.

You can configure which role appears by default when you add a person or search for a person who has both the Contact and Consumer roles.

See and Chapter 11, "Defining Person Business Objects," Configuring the Person Component, page 171.

The links at the bottom of the page enable you to view information for another person role. Different links appear depending on which role is currently shown. For example, when the Consumer pages appear, the link is Add Contact Information or Edit Contact Information. The links show the words*Add* or *Edit* depending on whether the role information already exists for the person.

Add Consumer Information and **Edit Consumer Information**	Click to add the Consumer role to the person or, if the Consumer role already exists for the person, to edit consumer information. The common information appears, but consumer-specific pages appear instead of contact-specific pages. **Note.** This link appears if the Contact pages for a person currently appear.
Add Contact Information and **Edit Contact Information**	Click to add the Contact role to the person or, if the Contact role already exists for the person, to edit contact information. **Note.** This link appears only if the Consumer pages for a person currently appear.
Add Worker Information and **Edit Worker Information**	Click to add or edit worker information for the person. The common information appears, but worker-specific pages appear instead of contact-specific pages. **Note.** The Worker component is the primary place where worker information is viewed and updated. See and Chapter 12, "Defining Workers," page 191.
Add Person of Interest Information and **Edit Person of Interest Information**	Click to add or edit person of interest information for the person.

Person Information

Enter basic name information. The name information appears differently depending on the country that is specified for the user. For example, in Japan, the last name appears in order before the first name.

See and Chapter 4, "Defining Name and Address Information for Business Objects," Updating Name Information, page 55. and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up Security and User Preferences," Defining Overall Preferences.

For double-byte operating systems, you can enter the name and address information in alternate character format.

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Implementing Alternate Character."

Contact Info Entries

Enter address, phone, and email information. Two Contact Info Entries regions appear on this page: one for home information and one for business information.

See and Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Contact Information for Business Objects, page 58.

Alternate Character

For double-byte operating systems, you can enter the name and address information in alternate character format.

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook,* "Implementing Alternate Character."

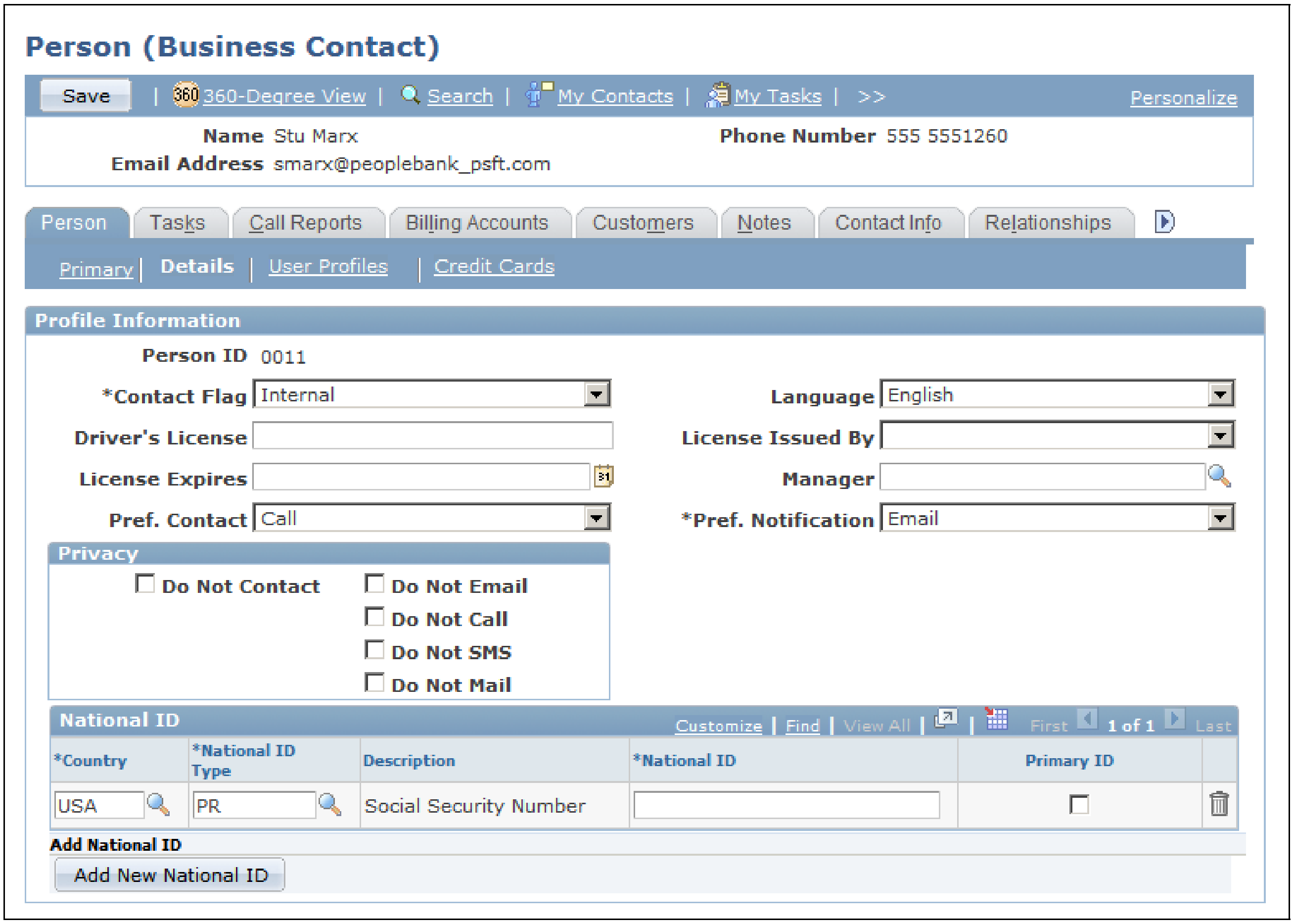
User-Defined Fields

You can define up to 10 fields in which to enter and store information that is useful to you. This information is stored on a separate table in the database and is available for users that you create.

Edit User Defined Field Labels	Click to enter labels for user-defined fields. For example, you might change the label Field 1 to Name of Pet.

Viewing and Updating Person Details

Access the Person (<Role>) **-** Person: Details page (click the Details link on the Person page).



Person (<Role>) - Person: Details page

The example that is shown is for the Business Contact role. If you are viewing information for a person with the Consumer role, the Purchasing Options and Status and Currency Data page regions appear.

Profile Information

Privacy Select an option to indicate restrictions on ways of contacting the person.

Purchasing Options

This page region appears only for a person with the Consumer role.

See and Chapter 11, "Defining Person Business Objects," page 167.

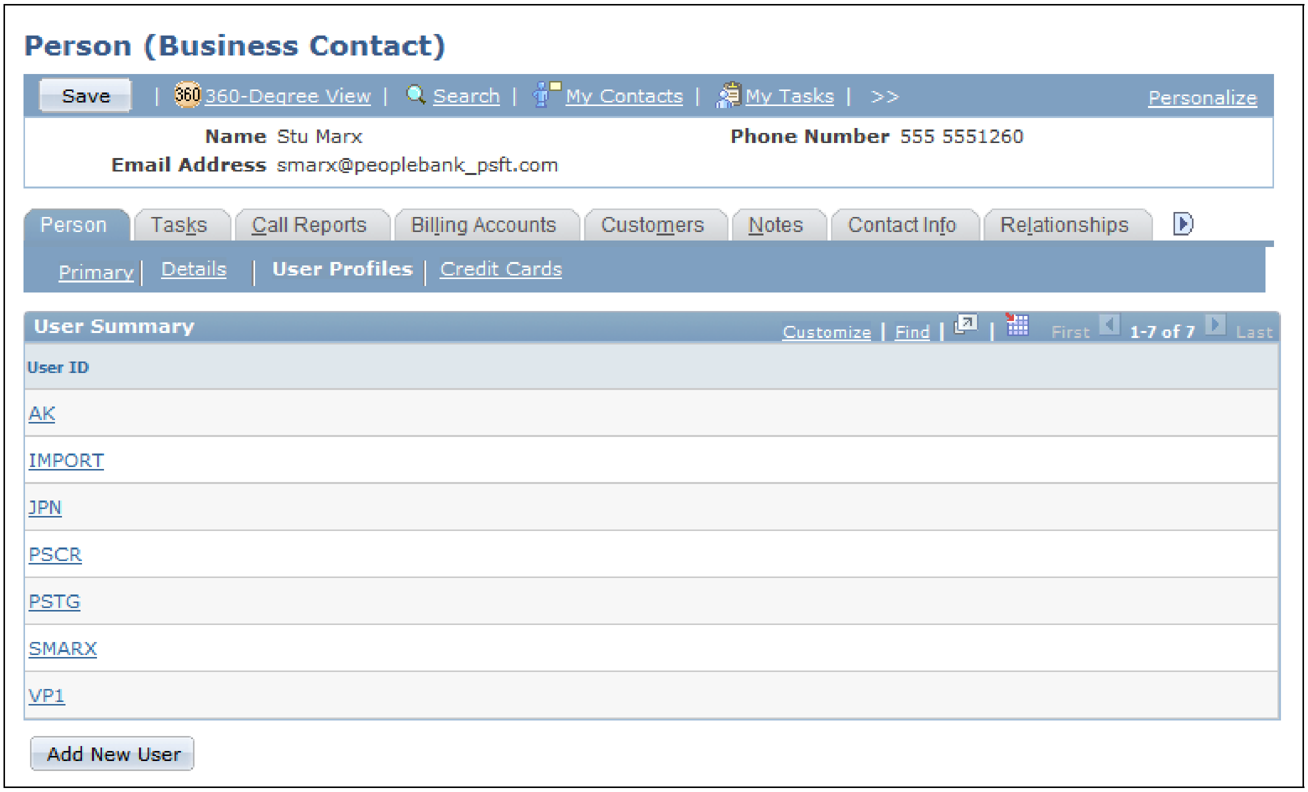
Status and Currency Data

This page region appears only for a person with a contact role in the financial market.

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up Currencies."

Maintaining User Information

Access the Person (<Role>) - User Profiles: User Summary page (click the User Profiles link on the Person page).



Person (<Role>) - Person: User Profiles: User Summary page

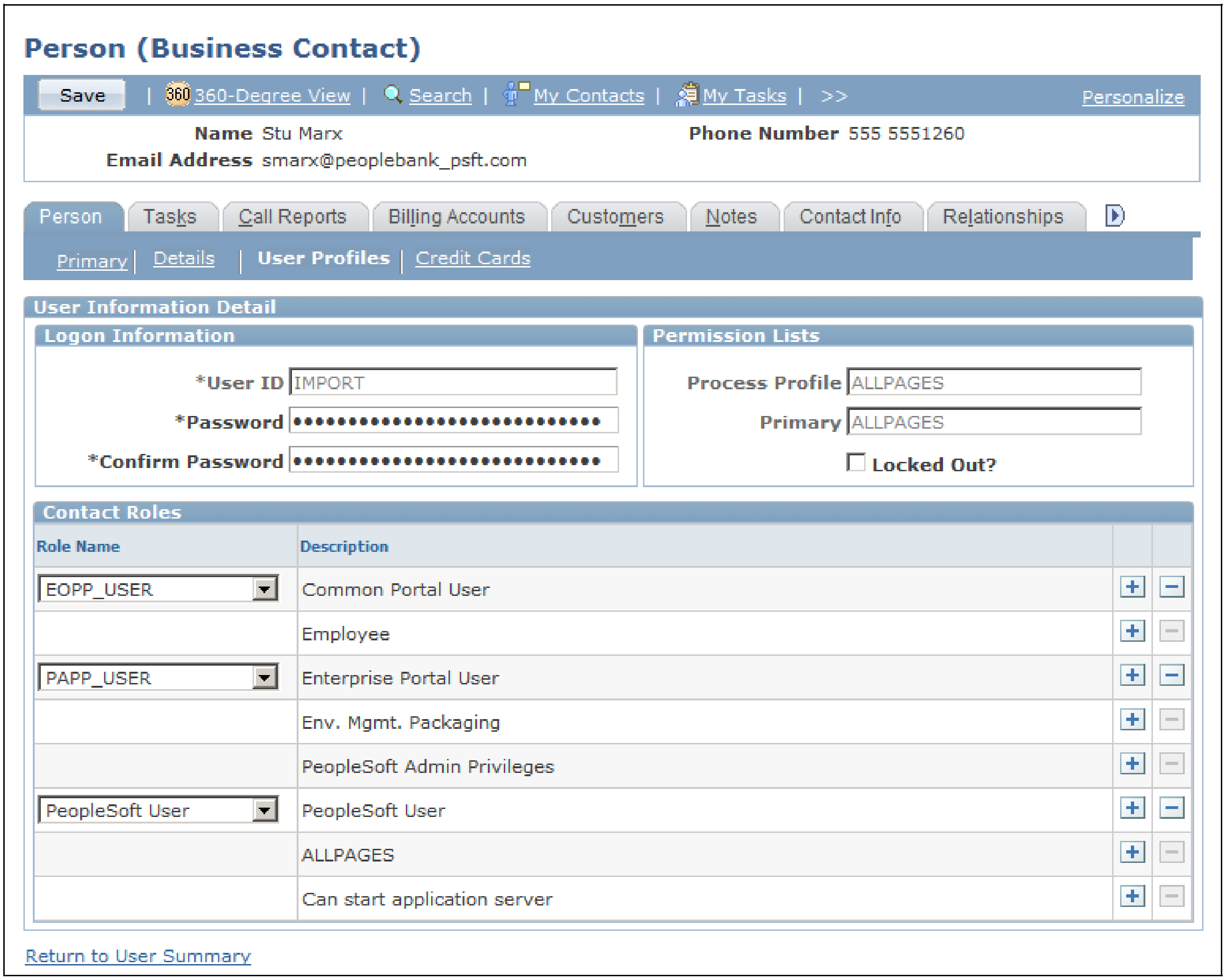
In the User Summary region, the user IDs that are already associated with the person appear. If no users are associated, then no user information appears.

User ID Click a user ID to access the detailed user profile information.

Add New User Click to add a new user. When you click this button, more fields appear on the page for you to enter information about the user.

User Information Detail

Access the Person (<Role>) - Person: User Profiles: User Information Detail page (click the User Profiles link on the Person page).



Person (<Role>) - Person: User Profiles: User Information Detail page

User Information Detail

Enter user ID, password, and permission list information for the user.

Contact Roles

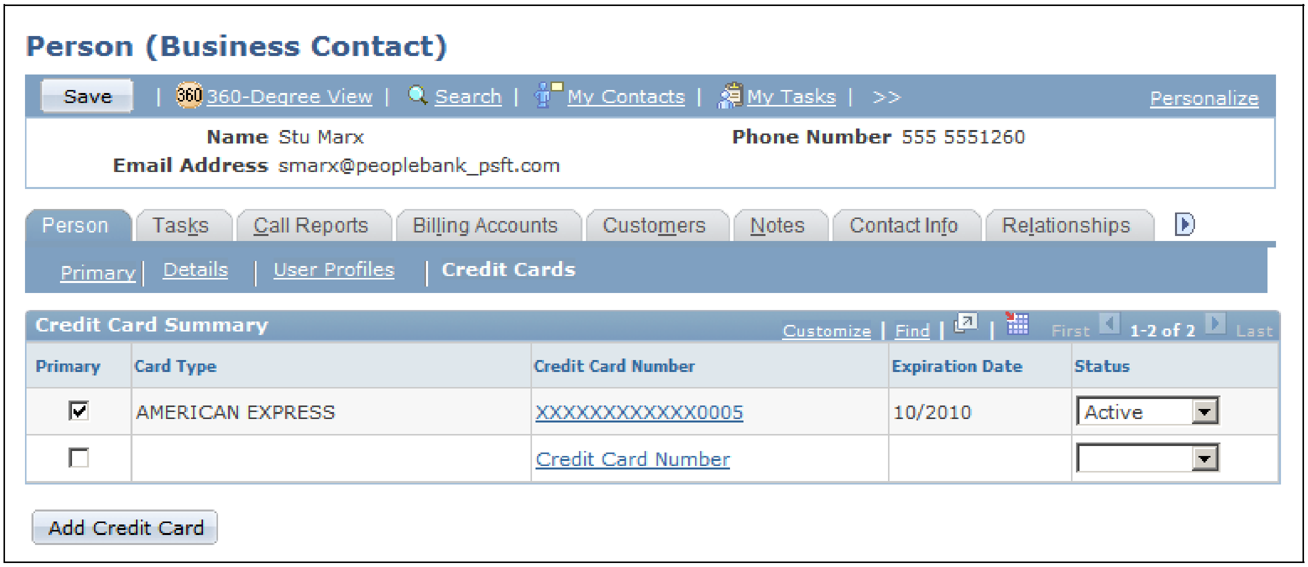
You can grant security roles to the person who is associated with the user ID. The Role Name field lists only roles that you have permission to grant based on your user ID.

See Also

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

Maintaining Credit Card Information

Access the Person (<Role>) - Person: Credit Cards page (click the Credit Card link on the Person page).



Person (<Role>) - Person: Credit Cards page

The Credit Card Summary section lists all the saved credit card entries created for the person, which can be used to pay for charges pertaining to cases, service orders, agreements, and orders.

Primary Indicates the selected credit card to be the default entry that is used to pay for charges to which the person is liable.

Credit Card Number Click the link to access the detailed information of the selected credit card.

See and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Managing Credit Card Payments," Submitting Credit Card Information for Authorization.

Expiration Date Displays the expiration date of the corresponding credit card.

Status Select a status for the credit card. The system populates only *active* credit card entries in supported transactions as payment options.

Add Credit Card Click to add new credit card entries.

Maintaining Sales Team Tasks for a Person

Access the Person (<Role>) - Tasks page (select the Tasks tab on any page in the Person component).

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

Accessing Call Reports for a Person

Access the Person (<Role>) - Call Reports page (select the Call Reports tab on any page in the Person component).

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook,* "Working with Call Reports," Working with Call Reports.

Accessing Notes and Attachments for a Person

Access the Person (<Role>) - Notes page.

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

Accessing Billing Accounts

Access the Accounts page (select the Billing Accounts tab on any page in the Person component).

Maintaining Contact Information for a Person

Access the Person (<Role>) - Contact Info page (select the Contact Info tab on any page in the Person component).

See and Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Contact Information for Business Objects, page 58.

Viewing and Updating Person Relationships

Access the Person (<Role>) - Relationships page (select the Relationships tab on any page in the Person component).

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

Viewing and Updating Person Profile Information

Access the Person (<Role>) - More Info (more information) page (select the More Info tab on any page in the Person component).

See and Chapter 7, "Working with Business Object Profiles," page 91.

Defining Information for Business Contacts

This section lists the pages that are used to define information for business contacts.

Pages Used to Define Information for Business Contacts

Page Name	*Definition Name*	*Navigation*	*Usage*
Person (Business Contact) - Customers	RD_PERSON_COMP	Select the Customers tab on any page in the Person (Business Contact) component.	Maintain the customers that are associated with a business contact.
Person (Business Contact) - Add Customer / Site / Purchasing Options	RD_PERSON_ADD_COMP	Click the Add Customer button on the Person (Business Contact) - Customers page.	Add customers for a contact.
Search For Customer	RBQ_BOSRCH	Click the Search icon on the Person (Business Contact) - Add Customer / Site / Purchasing Options page.	Search for a customer to add for the contact.

Defining Consumer Information

This section discusses how to:

- Maintain tax exempt information for a consumer.
- Maintain purchasing options for a person.
- Define account teams.
- Define account plans.
- Maintain consumer contact information.

Pages Used to Define Consumer Information

Page Name	*Definition Name*	*Navigation*	*Usage*
Person (Consumer) - Person: Purchasing	RD_CONSUMER_BC_OPT	• Add Person Click the Purchasing link. • Select an existing person on the Person Search page. If the Purchasing link does not appear, click the Add Consumer Information link or Edit Consumer Information link, whichever appears. Click the Purchasing link.	Maintain purchasing options for a person.
Person (Consumer) - Person: Employments	RD_PERSON_EMPLOY	Click the Employments link on the Person page for a person with the Consumer role.	Add a person's employment history.
Person (Consumer) - Person: Tax Exempt Certificate	RD_TAX_EXEMPT_CONS	Click the Tax Exempt Certificate link on the Person page for a person with the Consumer role.	Maintain a person's tax exemption information.
Person (Consumer) - Account Team	RD_ACCOUNT_TEAM	Select the Account Team tab on any page in the Person component for a person with the Consumer role.	Define the account team that is assigned to the consumer.
Person (Consumer) - Plans	RD_ACCOUNT_PLAN	Select the Plans tab on any page in the Person component for a person with the Consumer role.	Define the account plan for the consumer.
Person (Consumer) - Contact Info: Contacts	RD_CONSUMER_REP	Customers CRM, Search Person, Person (Individual Consumer), Contact Info Click the Contacts link.	Maintain the list of contacts for a consumer.
Create Contact of <consumer>	RBQ_QCREATE	Click the Add Contact button on the Contacts page for a consumer.	Add a contact to a consumer.

Page Name	Definition Name	Navigation	Usage
Modify <contact>	RBQ_QCREATE	Click the Edit button for any listed contact of a consumer.	Maintain information for an existing company contact, including purchasing options and contact information.
Person (Consumer) - Sites	RD_CONSUMER_SITE_2	Click the Sites link on the Contact Info page for a person who is a consumer.	Maintain the list of sites for a consumer.
Create Site of <consumer>	RBQ_QCREATE	Click the Add Site button on the Sites page for a consumer.	Add a site to a consumer.
Modify <site>	RBQ_QCREATE	Click the Edit button for any listed site of a consumer.	Maintain information for an existing company site.

See Also

Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Contact Information for Business Objects, page 58

Maintaining Tax Exempt Information for a Consumer

Access the Person (Consumer) - Person: Tax Exempt Certificate page (click the Tax Exempt Certificate link on the Person page for a person with the Consumer role).

See and Chapter 9, "Defining Company Business Objects," page 137.

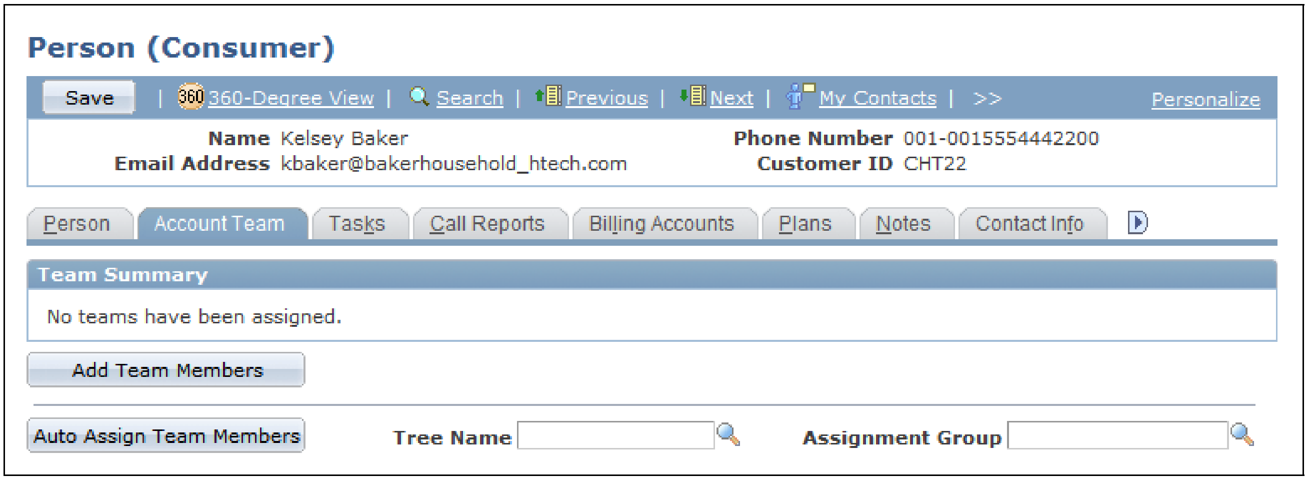
Maintaining Purchasing Options for a Consumer

Access the Person (Consumer) - Person: Purchasing page (click the Purchasing link).

See and Chapter 5, "Defining Purchasing Options for Companies, Consumers, and Sites," page 77.

Defining Account Teams

Access the Person (Consumer) - Account Team page (select the Account Team tab on any page in the Person component for a person with the Consumer role).



Person (Consumer) - Account Team page

You can add team members to the account team individually or automatically by using sales territory trees and assignment groups.

See and *PeopleSoft Sales 9.1 PeopleBook*, "Working with Customer Accounts," Assigning Representatives to Accounts.

Defining Account Plans

Access the Person (Consumer) - Plan page (select the Plan tab on any page in the Person component for a person with the Consumer role).

This page lists the account plans that are defined for the consumer. You can click a listed plan to drill down to its detail.

See and *PeopleSoft Sales 9.1 PeopleBook*, "Working with Customer Accounts," Creating Account Plans.

Maintaining Consumer Contact Information

Access the Person (Consumer) - Contact Info page (Customers CRM, Search Person, Person [Individual Consumer], Contact Info).

The Contact Info page enables you to maintain addresses, contacts, and sites for the consumer.

See and Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Contacts, page 67. and Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Sites, page 73.

Defining Person of Interest Information

To define POI information, use the Person (RD_PERSON) component by clicking the Add Person of Interest Information or Add Person (Person of Interest) link that appears at the bottom of the Person (<Role>) - Person: Primary page. The information that you can enter for persons of interest is basic person data, as described previously in this chapter. If the POI originated in an HR system, the person might have job records associated with them.

See Also

Chapter 11, "Defining Person Business Objects," Persons of Interest, page 171

Chapter 12

Defining Workers

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

- Create workers using the Worker component.
- Maintain worker information.
- Set up foundational data for workers.

Understanding Workers in CRM

This section discusses:

- Workforce administration.
- Options for creating workers.
- Job information and effective dates.

Workforce Administration

Worker refers to anyone who performs work for an organization, including employees and contractors. Employees who are not part of the CRM workforce are considered CRM customers in the sense that they might call the help desk or HR help desk for assistance with problems. This chapter focuses on maintaining the information that is necessary to administer workers who are part of the CRM workforce and to assign them to field service and support tasks.

In CRM, workers are represented as Person business objects with a role type of Worker. The Person table (RD_PERSON) contains a record for each worker, with Person ID as the key field. Attributes that are specific to the person's role as a worker, such as employee status, job location, work function, and so forth, are stored in the Worker table (RB_WORKER).

Workers are not tracked as business contacts, although you can assign the Contact role to a worker.

See and Chapter 11, "Defining Person Business Objects," Viewing and Updating Primary Person Information, page 176.

Worker User Preferences and Security

Workers often have access to the CRM system to perform their functions. You can control worker access to data for system functions.

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up Security and User Preferences," Defining Roles with Access to Sensitive Worker Information. and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up Security and User Preferences."

Worker Foundational Data

Worker foundational data is the control information (or prompt tables) from which you select when creating a worker. This data describes the organization infrastructure in which workers perform. You can maintain these tables in CRM, PeopleSoft Human Capital Management (PeopleSoft HCM), or a third-party system and move the data to CRM by implementing enterprise integration points (EIPs).

This is the worker foundational data that you must set up before creating workers:

- Job codes.

  Use the Job Code Table EIP to integrate with an HR system.

- Department tables.

  Use the Department Table EIP to integrate with an HR system.

- Locations.
- Competency information.

  Worker competency information determines which workers are best qualified for assignment to a case or service order. Use the Competency Type, Rating Model, and Competency EIPs to integrate with an HR system.

  See and Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," page 343.

Navigation

CRM provides two ways to access pages that you might use when setting up worker data: the left-hand menu and the Worker Administration Center. This chapter lists the left-hand menu navigation.

Options for Creating Workers

After you set up the foundational data, you create workers in several ways:

- Use the Person or Worker component to create and maintain worker records in CRM.

  When you create a worker in the Worker component, you can create a new worker, copy data from an existing worker, or copy data from a template worker.

- Integrate worker data with PeopleSoft HCM or a third-party HR system.

  You implement the Personal Data, Workforce Data, and Person Competencies EIPs to populate the Person, Worker, and Worker Competency tables in the CRM system .

  If you integrate with an HR system that maintains worker data, do not modify the personal data, job detail, and competencies that are entered in the human resource system. You should use the Worker pages in CRM to maintain only user profiles, notes, and worker data that is used by the CRM assignment engine.

- Use quick create functionality.

  The Quick Create component requires that you enter the minimum required information and is used to quickly enter data.

Copying Existing and Template Workers

Creating a worker by copying an existing worker and creating a worker by copying a template worker are similar processes. The difference is in the way in which you identify the information to copy. When you copy an existing worker, you must search through the entire Worker table to identify the worker to copy; but when you copy a template worker, you can select the worker to copy from a drop-down list box that contains only workers who are designated as template workers.

Template workers are workers whose information represents a model to use when you create other workers. You can set up dummy workers, such as CSR Level 1, as template workers. You can also identify employees who are good template workers. For example, employee John Smith is a good template worker for CSR Level 1. You designate a worker as a template worker when you enter the job detail for the worker. Whether you designate real employees or set up dummy workers for templates is an implementation consideration.

When you create a worker by copying an existing worker or a template worker, all active worker roles are copies to the new worker. Current active job details for all assignments are copied, but not historical or future job details.

Worker Toolbar

The worker toolbar contains a Create from Current button that you can use to create a new worker from a worker whose data you are currently viewing and a Copy Data button that you can use to copy the worker's data to another worker.

See Also

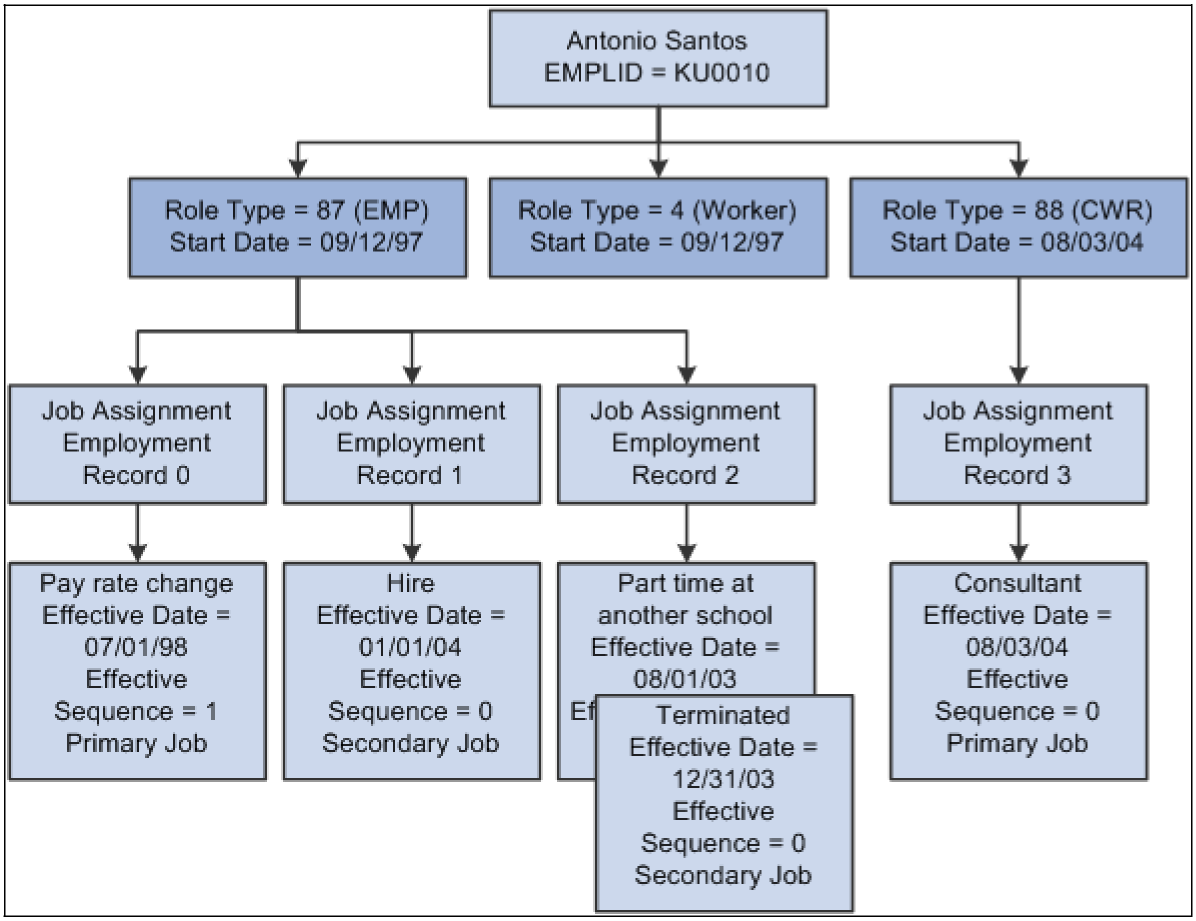
Customer and Worker Data Integrations

Job Information and Effective Dates

A worker's job assignments and their relation to the organization can change over time. For example, a worker can be promoted, perform a different job, or change from employee to contingent worker status. Changes in a worker's job and organizational relationships are represented in the database by effective-dated assignment and job detail rows.

The current row is the most recent row for which the effective date is before the current date. Future-dated rows are all rows for which the effective date is after the current date, and historical rows are all rows for which the effective date is before the effective date of the current row.

This diagram illustrates the use of effective dates in managing a worker's assignments, roles, and job information:



Effective-dated job information

In this example, Antonio Santos was hired on September 9, 1997. Antonio is assigned the Worker and Employee roles as of his hire date, and the effective date of both roles is set to the date of hire. Initially, the end date for both roles is set to 12/31/2999.

Assignments and Roles

All workers have the *Worker* role by default, and must also have either the *Employee* or *Contingent Worker* role on each assignment. The *Worker* role is terminated only when all assignments for the worker are terminated.

Each worker can have multiple assignments, and an assignment can have multiple effective-dated job detail records for it. You can add a new job assignment without changing existing job records. The first job record that you add for new job assignments always has the *Hire* action code, and you must specify the worker's role for each assignment. An assignment is terminated when all active job records that relate to it are terminated.

Jobs

There are two levels of primary jobs. One at the job level is user-selected and could be called the *primary job.* Another primary job is system-defined and could be called the *primary job assignment.* The primary job assignment is determined by an algorithim and takes into consideration the primary job. A worker can have only one primary job assignment.

By default, the first job record added for a role is marked as the *Primary* job record for that role. The primary job assignment is used by the Assignment Engine when assigning workers to cases or service orders.

If a worker requires new job data for an existing assignment, for example, a new supervisor ID, job code, or location, you create a new effective-dated job record for that assignment. When Antonio receives a pay increase, a new job record is inserted, effective July 1, 1998 to reflect the change. The new current record becomes the primary record. A background job runs to mark the primary flag on future job records.

Inactivating Provider Group Memberships for Worker Terminated in HCM

If a worker is scheduled to be terminated in an integrated HCM system on a future date, the same status change in the corresponding CRM worker record is handled in the background through the WORKFORCE_SYNC EIP and reflected on the record properly when the termination date arrives. In a situation where the worker is a member of a provider group, such relationship needs to be inactivated as well.

CRM delivers an application engine (AE) program to dissociate terminated workers from their provider groups. This program, named *PGRP_JOB,* is scheduled to run nightly to identify terminated workers and inactivate any of their existing provider group memberships. When the update is completed, the status of a terminated worker is set to *Inactive* on the Provider Groups page of the related provider group. Similarly, the status of the provider group is set to *Inactive* on the Groups page of the terminated worker's record.

Creating Workers

To create workers, use the Add Worker (RD_CREATE_WORKER) and Copy Worker (RD_COPY_WRKR_DATA) components.

This section lists prerequisites and discusses how to:

- Select the method for creating a worker.
- Select information to copy to a new worker.
- Create workers using the Quick Create function.

Prerequisites

Before you create workers, you must set up the tables that contain information that is referred to by all workers. For example, each worker belongs to a department and has a job code. The information in these tables is called foundational data.

See and Chapter 12, "Defining Workers," Setting Up Foundational Data for Workers, page 216.

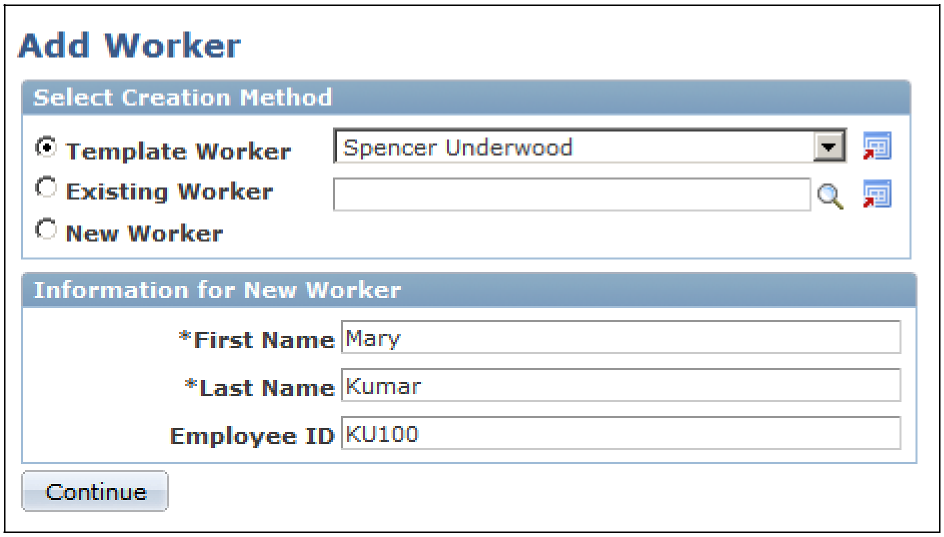
Pages Used to Create Workers

Page Name	***Definition Name***	***Navigation***	***Usage***
Add Worker	RD_CREATE_WORKER	Workforce, Add Worker, Add Worker	Select the method for creating a new Worker business object.

Page Name	**Definition Name**	**Navigation**	**Usage**
Add Worker	RD_COPY_OPTIONS	Access the Add Worker page. • Select the Template Worker option and select a template worker from the available choices. Enter the first and last names. Click the Continue button. • Select the Existing Worker option and select an existing worker. Enter the first and last names. Click the Continue button.	Select information to copy to a new worker from either a template or an existing worker.
Add Worker	RD_COPYWRKR_CONFRM	Click the Create Worker button on the second Add Worker page.	Verify that the worker information is correct.
Create Worker	RBQ_QCREATE	Customers CRM, Quick Create Search for a description of *The Worker*.	Add a worker with the minimum necessary information.

Selecting the Method for Creating a Worker

Access the Add Worker page (select the Template Worker option and select a template worker from the available choices. Enter the first and last names or click the Continue button).



Add Worker page

Select Creation Method

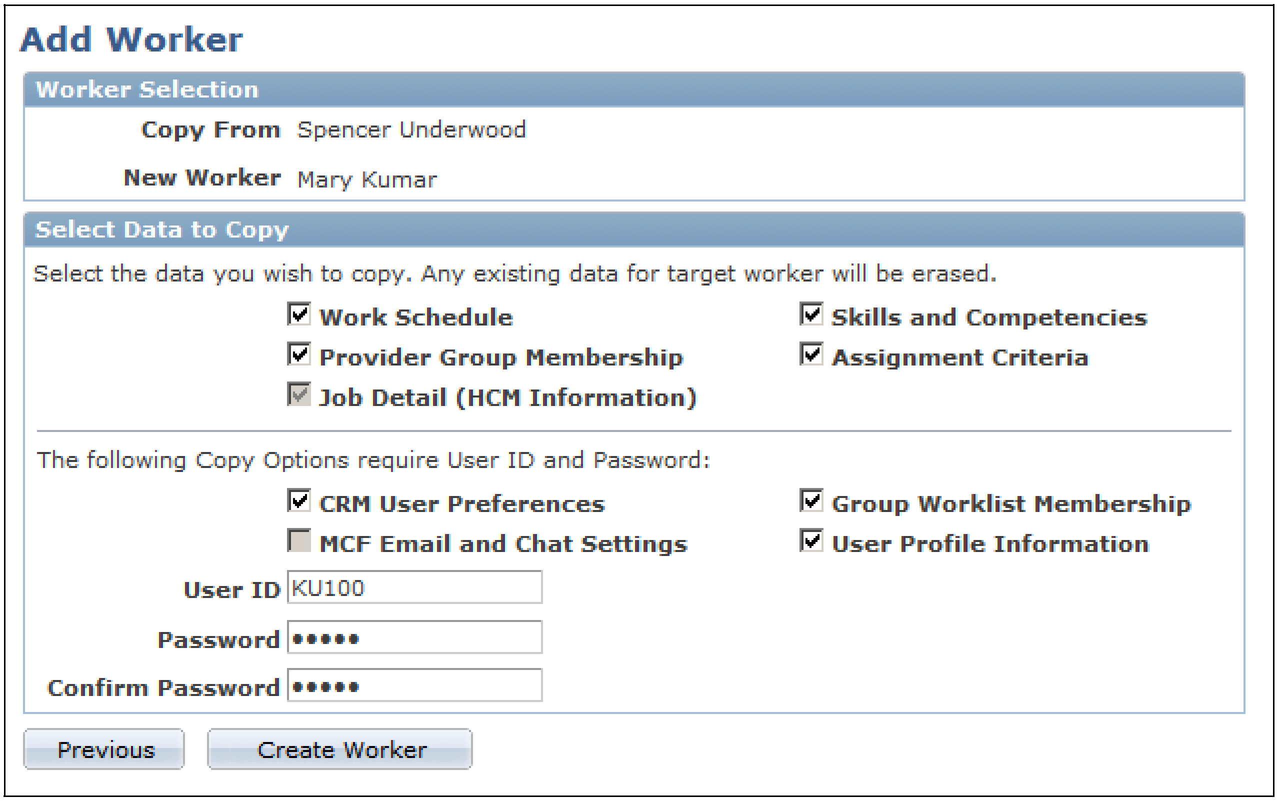
Template Worker	Select to create the new worker from a template worker. Select the template worker from the drop-down list box.
Existing Worker	Select to create the new worker from an existing worker. Search for and select the worker to copy.
New Worker	Select to access the Worker component and enter information for the new worker.

Information for New Worker

Enter the first and last names for the new worker, and optionally enter the employee ID.

Selecting Information to Copy to a New Worker

Access the Add Worker page (click the Create Worker button on the second Add Worker page).



Add Worker page

Select Data to Copy

Select the data to copy from the template worker or existing worker to the new worker. The job detail data is selected and copied by default—you cannot deselect this check box.

If you select User Profile Information,CRM User Preferences,MCF Email and Chat Settings (multichannel framework email and chat settings), or Group Worklist Membership, you must enter a user ID and password for the new worker.

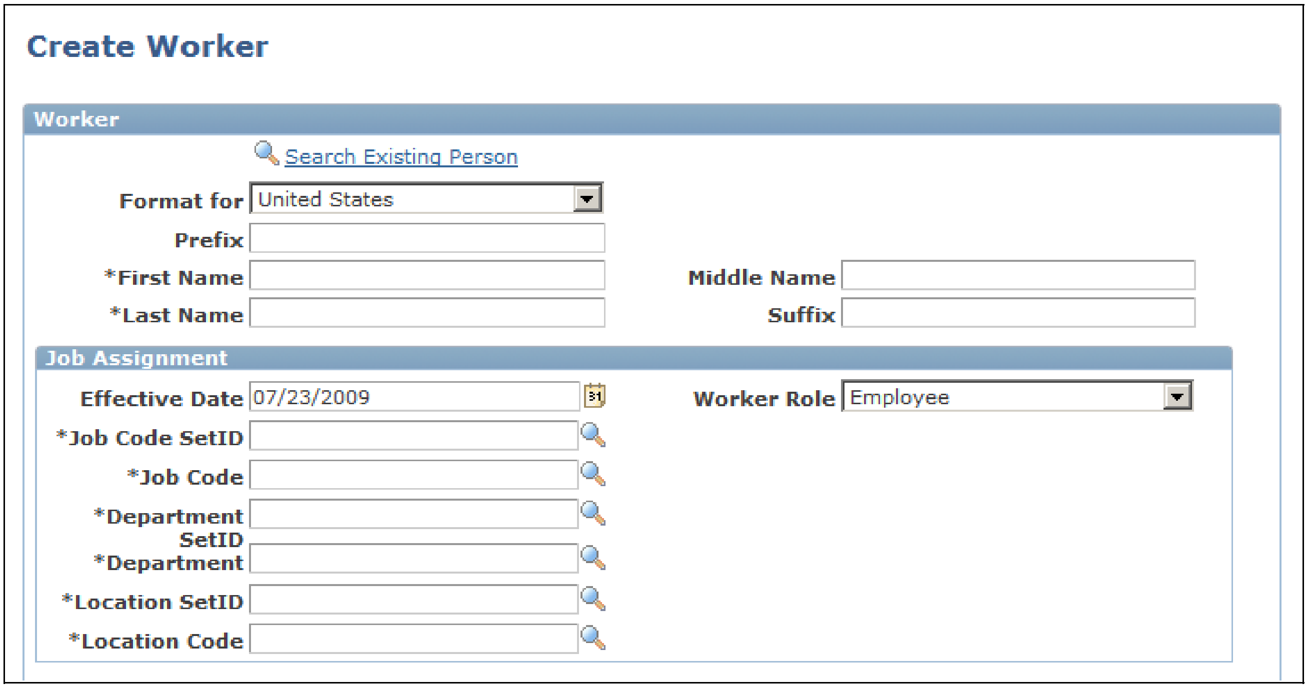
See Also

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

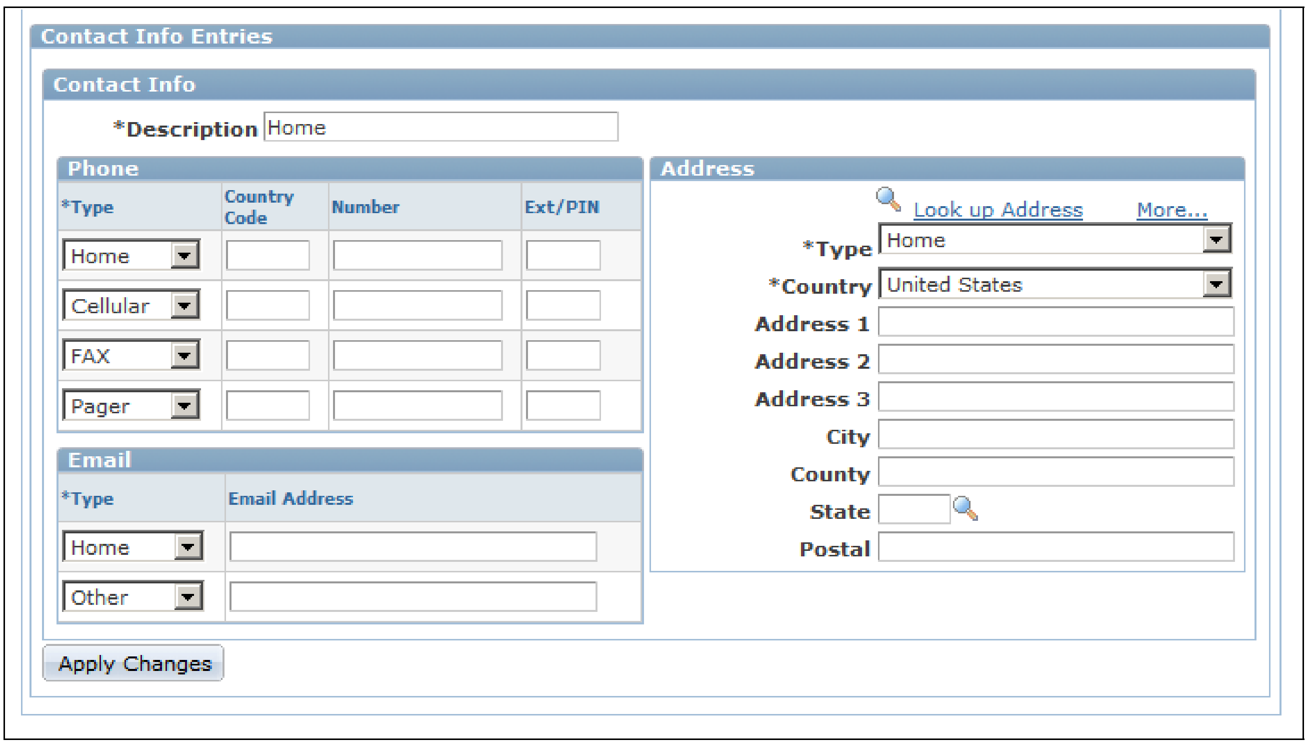
PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Oracle's PeopleSoft CRM Automation and Configuration Tools Preface"

Creating Workers Using the Quick Create Function

Access the Quick Create page (Customers CRM, Quick Create).



Create Worker page (1 of 2)



Create Worker page (2 of 2)

You can use this page in two modes:

- To enter information for a new worker.

  You can create only one effective-dated job row. This page does not enable you to set up security information, that is, user IDs, roles, and passwords.

  See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up Security and User Preferences."

- To retrieve and modify existing worker information.

Search Existing Person

Click to retrieve the information for an existing person. You can modify the information and click the Apply button to update the database.

Note. Job assignment information does not appear for an existing worker.

Maintaining Worker Information

To maintain worker information, use the Worker (RD_WORKER_2) component.

This section discusses how to:

- View and maintain summary worker information.
- View and maintain worker details.
- View and maintain user profiles.
- Enter job details.
- View assignment summary information.
- Define default schedules.
- Associate competencies with workers.
- Define job assignment criteria.
- Associate workers with provider groups and worklists.
- Define default storage locations.
- Define default signatures.

See Also

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

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up General Options," Setting Up Address Formats and Values

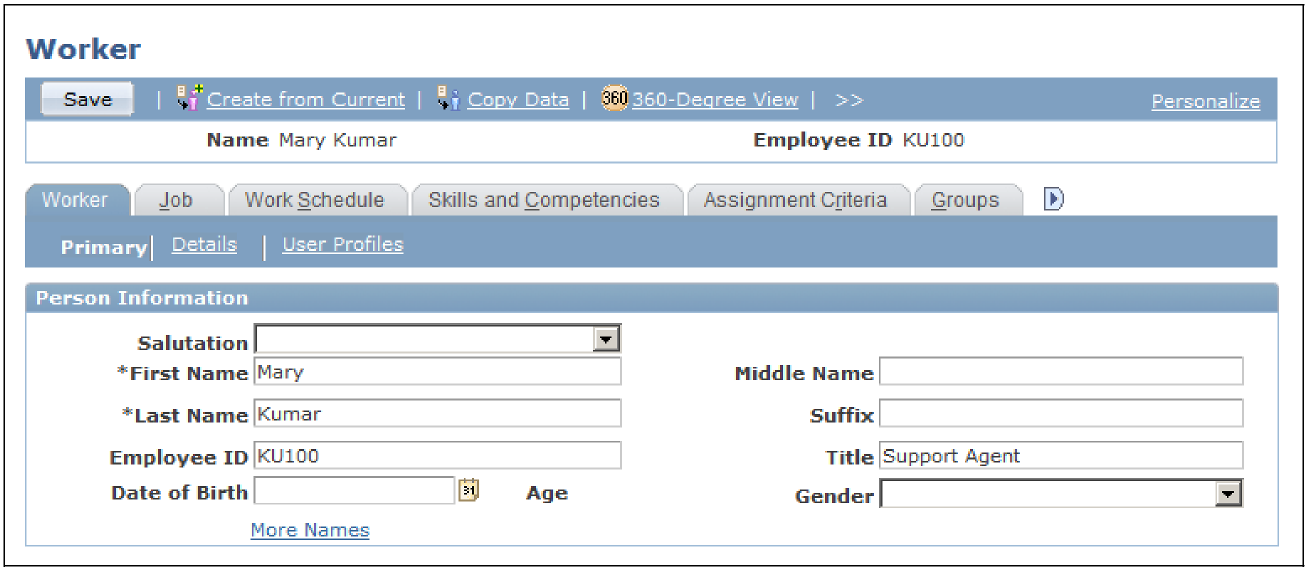
Pages Used to Maintain Worker Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Worker	RD_WORK_GSRCH	Workforce, Search Worker	Search the database for existing workers.
Person	RD_PERSON_SEARCH	Customers CRM, Search Person	Search the database for existing persons. **Note.** To access the Worker component for a person, click the Add Worker Information or Edit Worker Information link on the Person - Summary page.
Worker - Worker: Primary	RD_PRSN_PRIMARY	• Workforce, Search Worker, Primary • Workforce, Add Worker Enter required information on the Add Worker pages and click the Create Worker button.	View and update summary information for a worker.
Worker - Worker: Details	RD_PRSN_DETAILS	Click the Details link on the Worker - Primary page.	View and maintain worker profile information.
Worker - Worker: User Profiles	RD_PERSON_USER	Click the User Profiles link on the Worker - Primary page.	Maintain the worker's user profile.
Worker - Job: Job Details	RD_WORKER_DETAIL	Select the Job tab from any page in the Worker component.	Enter information about the specified worker's job.
Worker - Job: Job Summary page	RD_ASGN_JOB	Select the Job tab from any page in the Worker component. Scroll to the bottom of the Job Detail page and click the Return to Summary link.	View assignment summary information for the worker.
Worker - Work Schedule	RD_WORKER_SCHEDULE	Select the Work Schedule tab from any page in the Worker component.	Define default workdays for the specified worker.

Page Name	***Definition Name***	***Navigation***	***Usage***
Worker - Skills and Competencies	RD_WORKER_CMP_PROF	Select the Skills and Competencies tab from any page in the Worker component.	Associate the specified worker with a competency and define the worker's level of proficiency for the competency.
Worker - Assignment Criteria	RD_WORKER_CRITERIA	Select the Assignment Criteria tab from any page in the Worker component.	Define criteria that the assignment engine uses to match the specified worker to a case or service order.
Worker - Groups	RD_WORKER_GROUPS	Select the Groups tab from any page in the Worker component.	Associate the worker with provider groups and group worklists.
Worker - Storage Locations	RD_WORK_STORLOC	Select the Storage Locations tab from any page in the Worker component.	Define inventory storage locations that are associated with good and defective storage locations on a field service worker's truck.
Worker - Signature	RD_WORKER_WF_SIG	Select the Signature tab from any page in the Worker component.	Define a default signature to use when the specified worker sends manual notifications.
Worker - Notes	RD_PERSON_NOTES	Select the Notes tab from any page in the Worker component.	Add notes and attachments for the specified worker.
Worker - Address Book	RD_PRSN_ADDR_BOOKS	Select the Address Book tab from any page in the Worker component.	View and update a worker's contact information.
Worker - More Info	RD_PROFILE	Select the More Info (more information) tab from any page in the Worker component.	View and update a worker's marketing profile data.

Viewing and Maintaining Summary Worker Information

Access the Worker - Worker: Primary page (Workforce, Search Worker, Primary).



Worker - Worker: Primary page

The Worker - Worker: Primary page and the Person - Primary page are identical in appearance and usage, except:

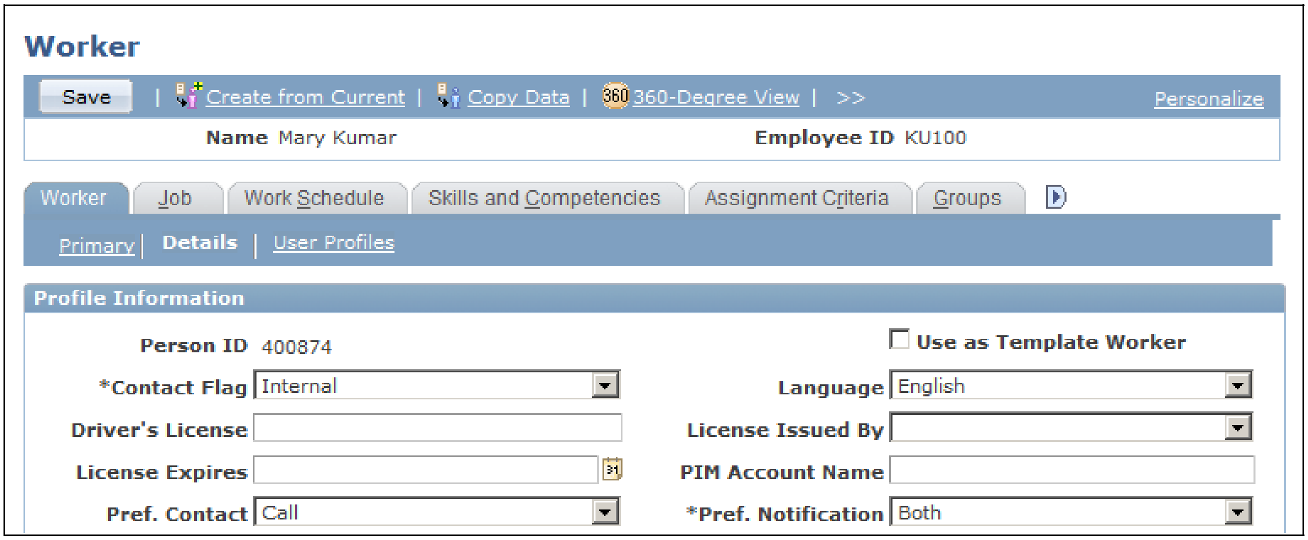
- The Worker - Worker: Primary page contains the employee ID and title.
- The Person - Primary page contains a setID.

Contact information entries and user-defined fields on the Worker - Worker: Primary page act the same as those on the Person - Primary page.

See and Chapter 11, "Defining Person Business Objects," Viewing and Updating Primary Person Information, page 176.

Viewing and Maintaining Worker Details

Access the Worker - Worker: Details page (click the Details link on the Worker - Worker: Primary page).



Worker - Worker: Details page

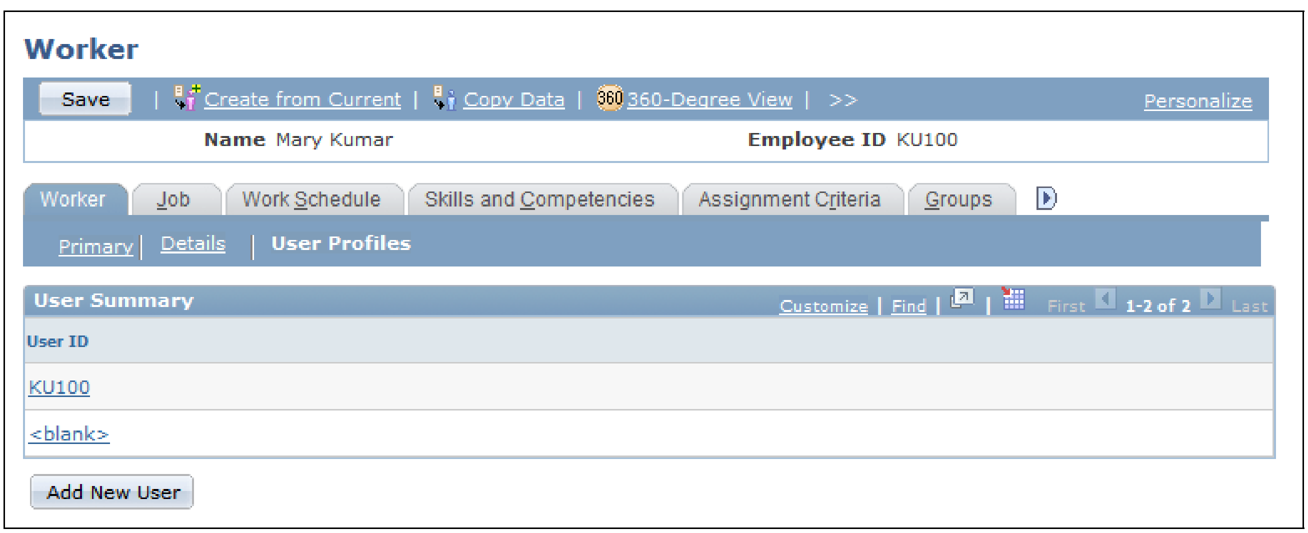
This page is similar in appearance and use to the Person - Details page, except:

- Only the Profile Information region appears on the worker page.
- On the worker page, the Use as Template Worker field enables you to make this worker's information available as a template for creating a worker.

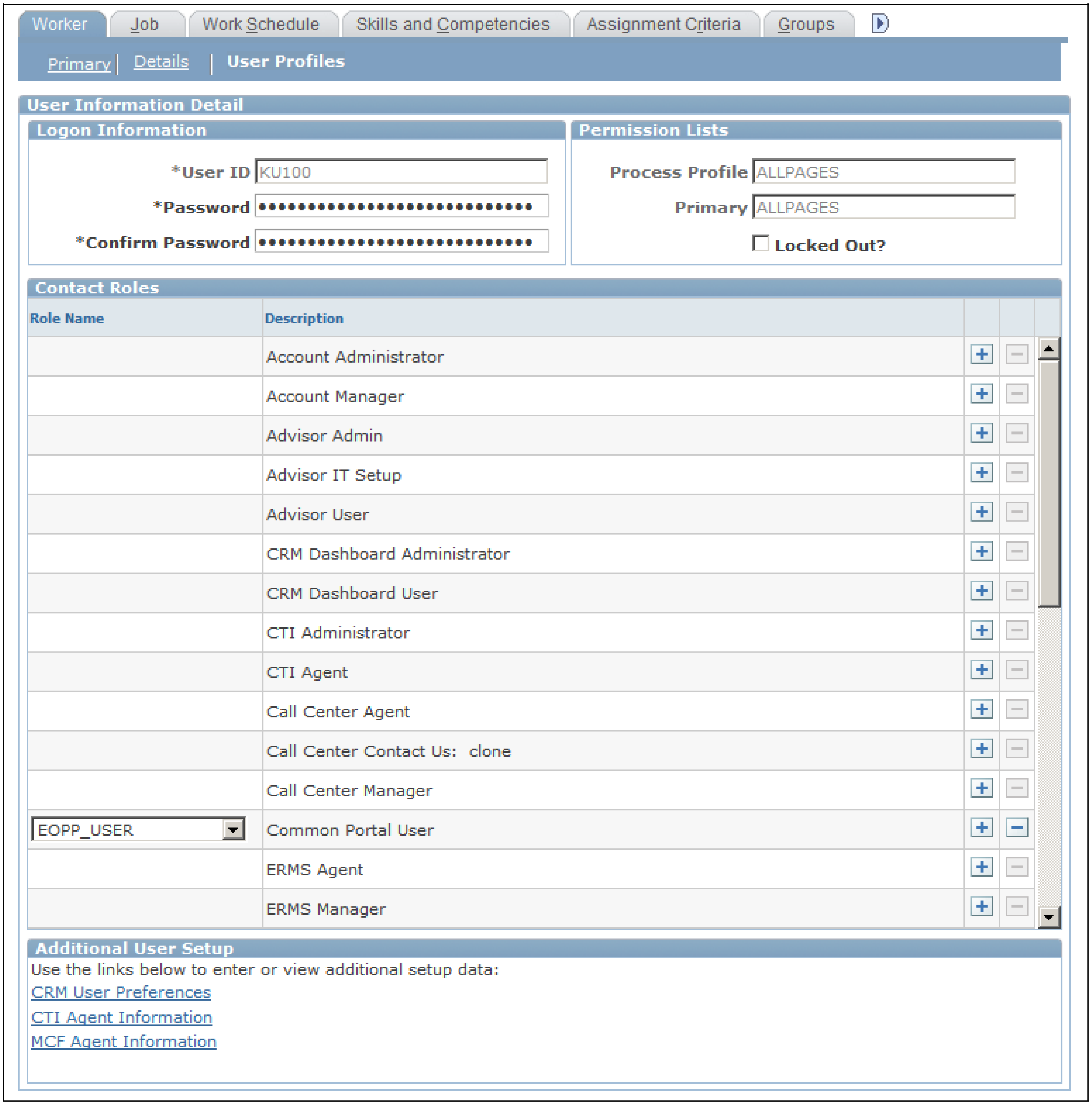
See and Chapter 11, "Defining Person Business Objects," Viewing and Updating Primary Person Information, page 176.

Viewing and Maintaining User Profiles

Access the Worker - Worker: User Profiles page (click the User Profiles link on the Worker - Primary page).



Worker - Worker: User Profiles: User Summary page



Worker - Worker: User Profiles: User Information Detail page

A list of the user IDs that the worker is authorized to use appears in the User Summary region of this page. You can click a listed user ID to view and modify the details of the user ID or click the Add New User button to add a new user ID to the worker.

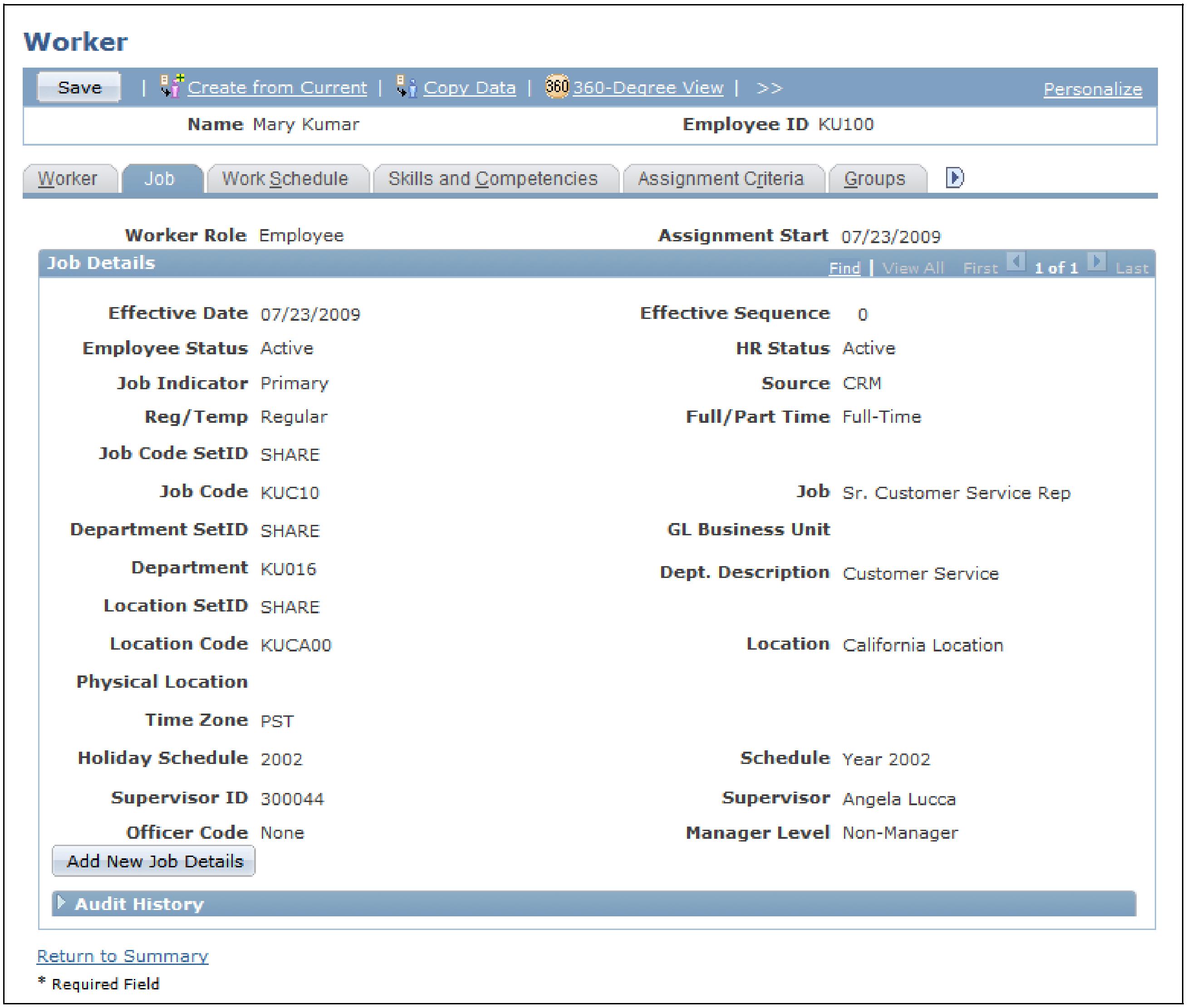
This page is similar in appearance and use to the Person - User Profiles page, except that the Additional User Setup region appears on the detail view of the page for workers in the GBL market.

See Also

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

Entering Job Details

Access the Worker - Job: Job Details page (select the Job tab from any page in the Worker component).



Worker - Job: Job Details page

By default, job details for the currently active primary job for the worker appear on this page. All workers can scroll through and view historical, current, and future job information. When the worker has existing job data and requires new job data, for example, a new supervisor ID, job code, or location, you add a new job details row with the new information. By default, the new effective date is the current date.

All users can update and delete effective-dated future job rows within a job assignment as long as at least one effective-dated row for each job assignment remains. All users can view historical, current, and future job data.

Secured Worker Information

You can perform these functions only if your sign-in role has secured worker access:

- Modify historical and current-dated job information records.
- Delete historical and current job information records.
- Modify the worker's employee status.
- View the worker's HR (Human Resources) status. Examples of HR status are *Active*,*Retired,* and *Terminated.*

Job Information

Worker Role

Select the worker's role.

The worker role indicates the worker's relationship to the organization. Values are *Employee* and *Contingent Worker.* This field is available only for the earliest job details record on an assignment.

Effective Date

Enter the effective date of the current job details. When you add new job details, the current date appears by default. All workers can view present, current, and future job details.

Effective Sequence

Sequences the order in which job detail records appear. When you add a new job details record, the system assigns it sequence number zero and increments the sequence numbers on the existing job details records by one. This is to ensure that job details appear in descending date order.

Job Indicator

Indicates that this is the primary job for the assignment. When you add a new job record and mark it as primary, the system recalculates the primary job assignment indicator.

Source

Indicates the source of the job record. Values are *HCM,* indicating that the job information was imported from the HCM system and *CRM,* indicating that the information was entered in CRM. You cannot update job records that originated in the HCM system.

GL Business Unit (General Ledger business unit)

Enter the business unit that is used to account for the worker's costs on the general ledger.

Physical Location

Enter a description of the worker's physical location. You can use this field to specify locations such as an office or cubicle number.

Holiday Schedule

Select the holiday dates that are valid for this worker.

Supervisor ID

Select the supervisor to whom this worker reports.

Officer Code

Select an officer code to identify highly compensated employees for the Non-Discrimination Testing - 401(k)/401(m) report (NDT004).

Manager Level

Select the worker's management level, if applicable.

Return to Summary

Click this link to view the Job Summary page, which lists summary information about the worker's assignments.

Entering Job Codes, Departments, and Locations

Job Code, Department, and Location Code are controlled by setID. You must enter the corresponding setID, and only values for the setID are valid. This information is defined when you set up worker foundational data.

See Also

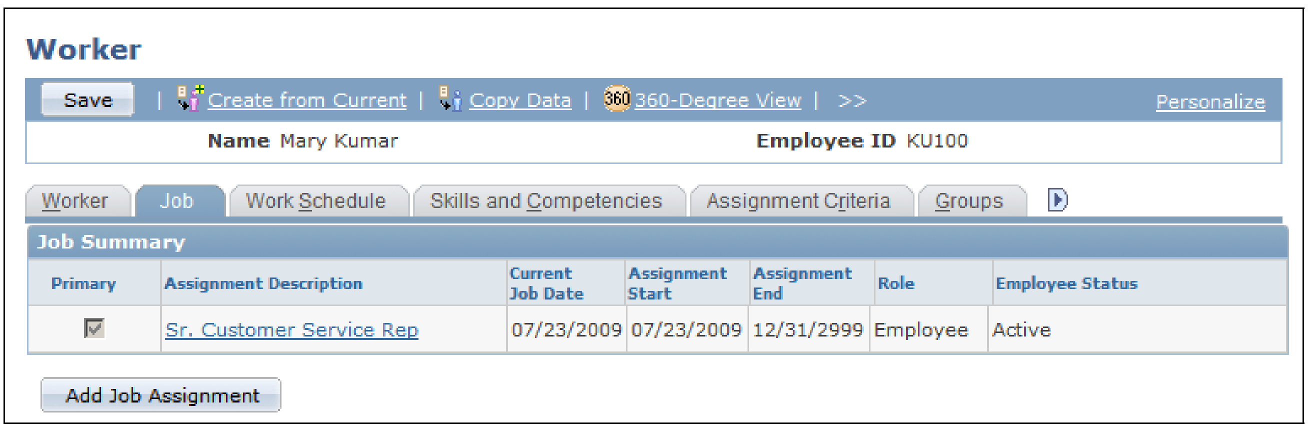
Chapter 12, "Defining Workers," Setting Up Foundational Data for Workers, page 216

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Working with Business Units and TableSet Controls"

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

Viewing Assignment Summary Information

Access the Worker - Job: Job Summary page (select the Job tab from any page in the Worker component, scroll to the bottom of the Job Detail page, and click the Return to Summary link).



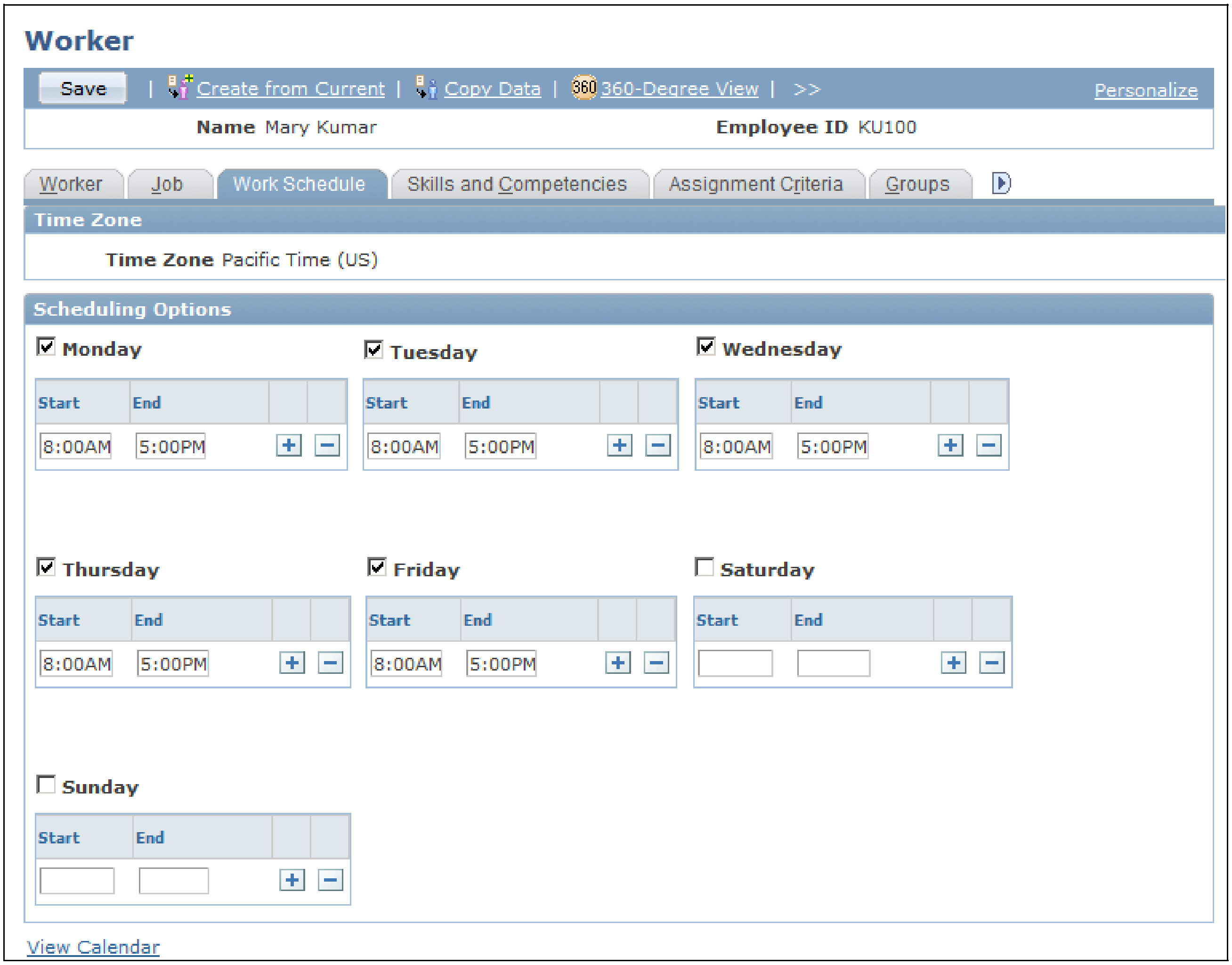
Worker - Job: Job Summary page

Use this page to view summary information from all the assignments the worker has had and drill down into the job details for any past, current, or future assignment. The system determines the assignment start and assignment end date from the dates of the job detail records for the assignment. The system also determines the primary assignment for the worker

Add Job Assignment	Click to add a new job assignment. New job assignments are added with the *Hire* action/reason. When you add a new job assignment, the Job Details page appears.

Defining Default Schedules

Access the Worker - Work Schedule page (select the Work Schedule tab from any page in the Worker component).



Worker - Work Schedule page

When evaluating worker availability for assignments, the system checks standard work week information that you define for the worker on this page.

Select the default work days for the specified person. The Start and End fields define the default hours of operation for the person. Enter start and end times for each work period in the day. You can enter multiple work periods to represent lunch breaks, shifts, and so forth. By default, the system populates these values with the standard work week information that you define for the installation.

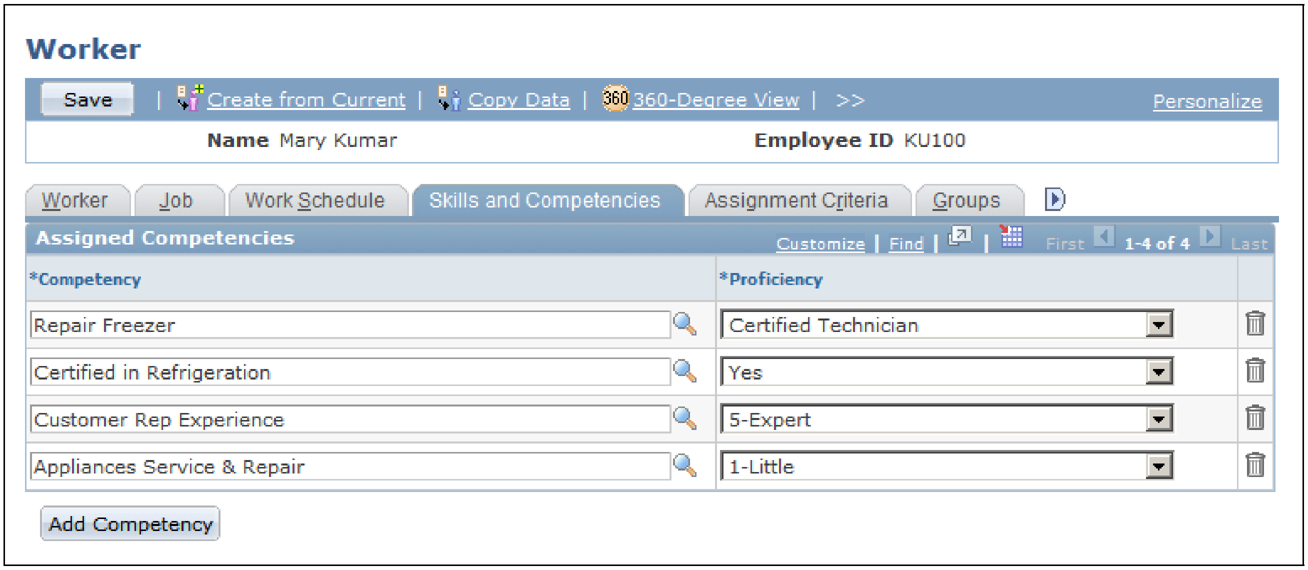
See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up and Performing Assignment Searches"

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

Associating Competencies with Workers

Access the Worker - Skills and Competencies page (select the Skills and Competencies tab from any page in the Worker component).



Worker - Skills and Competencies page

Important! Before assigning competencies on the Worker - Skills and Competencies page in CRM, you must select the Use Only Evaluation Type installation option.

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

ThePerson Competency EIP loads competency data with all evaluation types into CRM. Although the evaluation type does not appear in CRM, CRM pages list only the competency records that match the specified evaluation type. If you do not specify an evaluation type during the installation, competency records for all evaluation types are available, which can degrade system performance.

Description

Select a competency that is associated with the worker. In CRM, you establish competencies on the Competencies page under Set Up CRM, Common Definitions, Competencies.

Proficiency

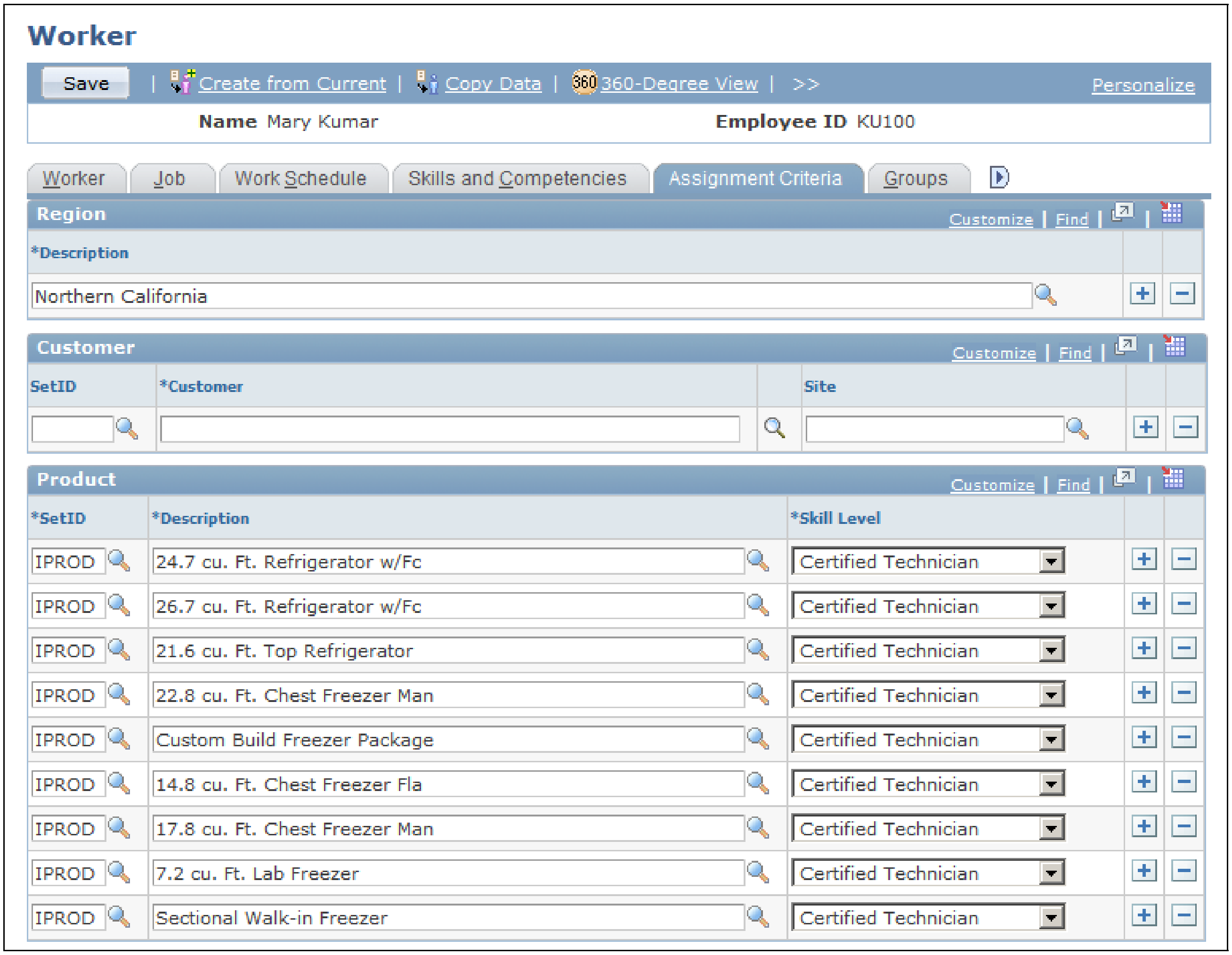
Enter the worker's level of expertise for the competency. The rating model that is defined for the competency on the Competencies page determines the available proficiency values. In PeopleSoft FieldService, the system checks a worker's proficiency level for a competency to determine whether the worker is qualified to perform work on a service order that requires the competency. In PeopleSoft Support and PeopleSoft HelpDesk, the system checks a worker's proficiency level for a competency to determine whether the worker is qualified to perform work on a case that requires expertise in the problem type.

See Also

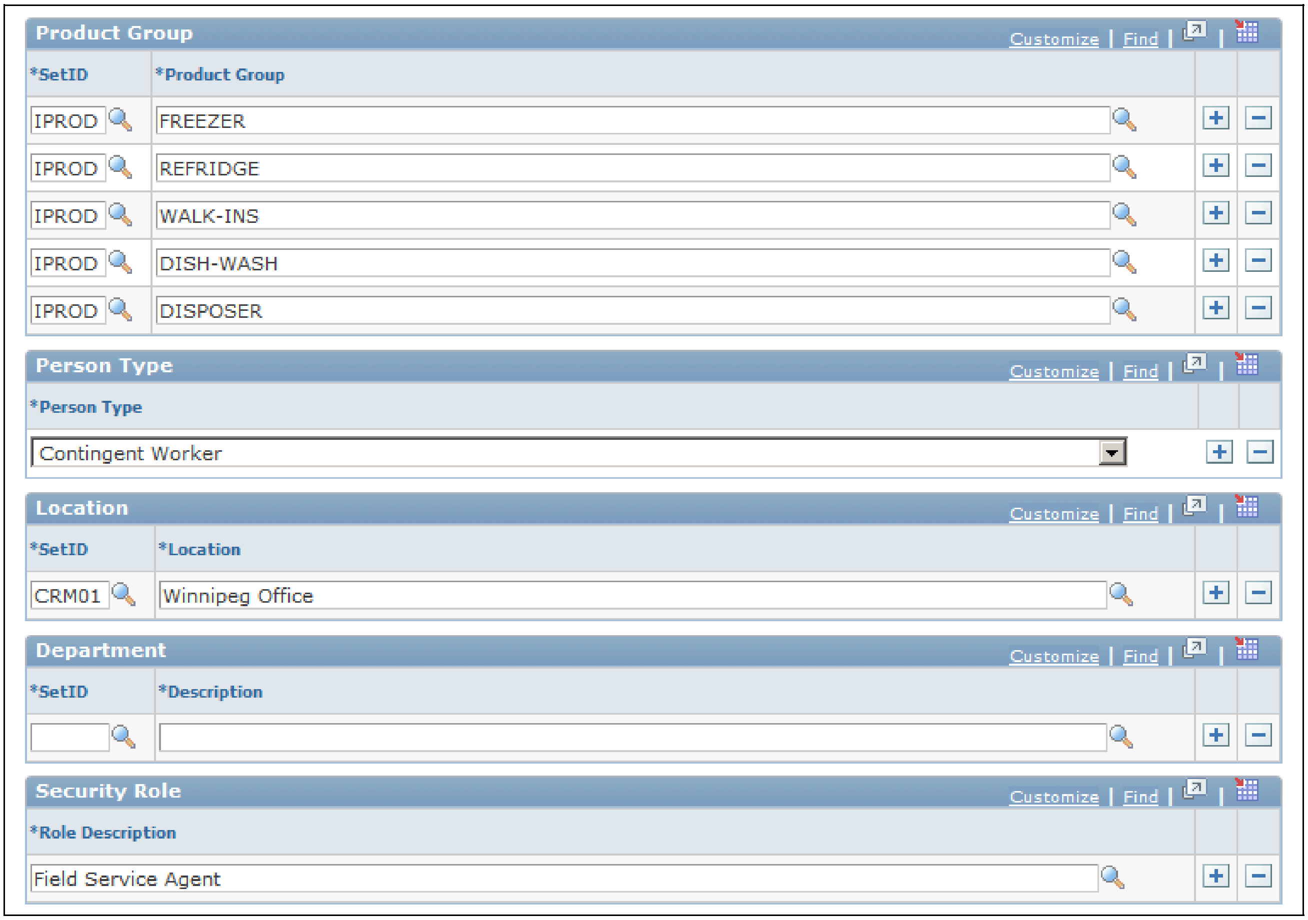
PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up and Performing Assignment Searches"

Defining Job Assignment Criteria

Access the Worker - Assignment Criteria page (select the Assignment Criteria tab from any page in the Worker component).



Worker - Assignment Criteria page (1 of 2)



Worker - Assignment Criteria page (2 of 2)

The system uses the values in the Customer, Region, Product, Product Group, Location,Department, and Role fields to evaluate how suitable a worker is for assignment to the service order, case, or change request task relative to other workers in the provider group.

When you perform an assignment search from a case, service order, or change request task, the assignment engine calculates a point value for each criteria value on the service order, case, or change request task that the worker matches based on the weight, or relative importance, of the match. The sum of the point values divided by the total possible points for the service order or case becomes the worker's fit score. Failure to match individual criteria lowers the worker's total fit score but does not exclude the worker from the list of suggested assignment candidates. Failure to match any criteria excludes the worker from the suggested candidates.

The assignment engine uses a different set of assignment criteria values for cases in PeopleSoft HelpDesk, cases in PeopleSoft Support, service orders in PeopleSoft FieldService, or tasks in PeopleSoft Change Management. For help desk cases, the assignment engine matches values for location, product, and product group. For both support cases and service orders, the assignment engine matches values for customer, site, region, product, and product group. For tasks in Change Management, the assignment engine matches values for location, department, either product or product group, and role.

Region

Enter the worker's region. The assignment engine matches the worker's region to the region on the service order or case.

Customer

If the worker can support the customer at any site, enter the customer and leave the Site field blank. You can also select a site without specifying a customer.

Product

The values for the Proficiency field depend on the product rating model that you specify for the setID when you set up the assignment engine.

Product Group

Enter the product groups that the worker supports and the setIDs of the product groups.

Location

Enter the worker's location and the location setID. The assignment engine matches the worker's location for change management tasks.

Department

Enter the worker's department and setID of the department.

Role

Enter the description of the worker's role. This is used to assign change management tasks to workers.

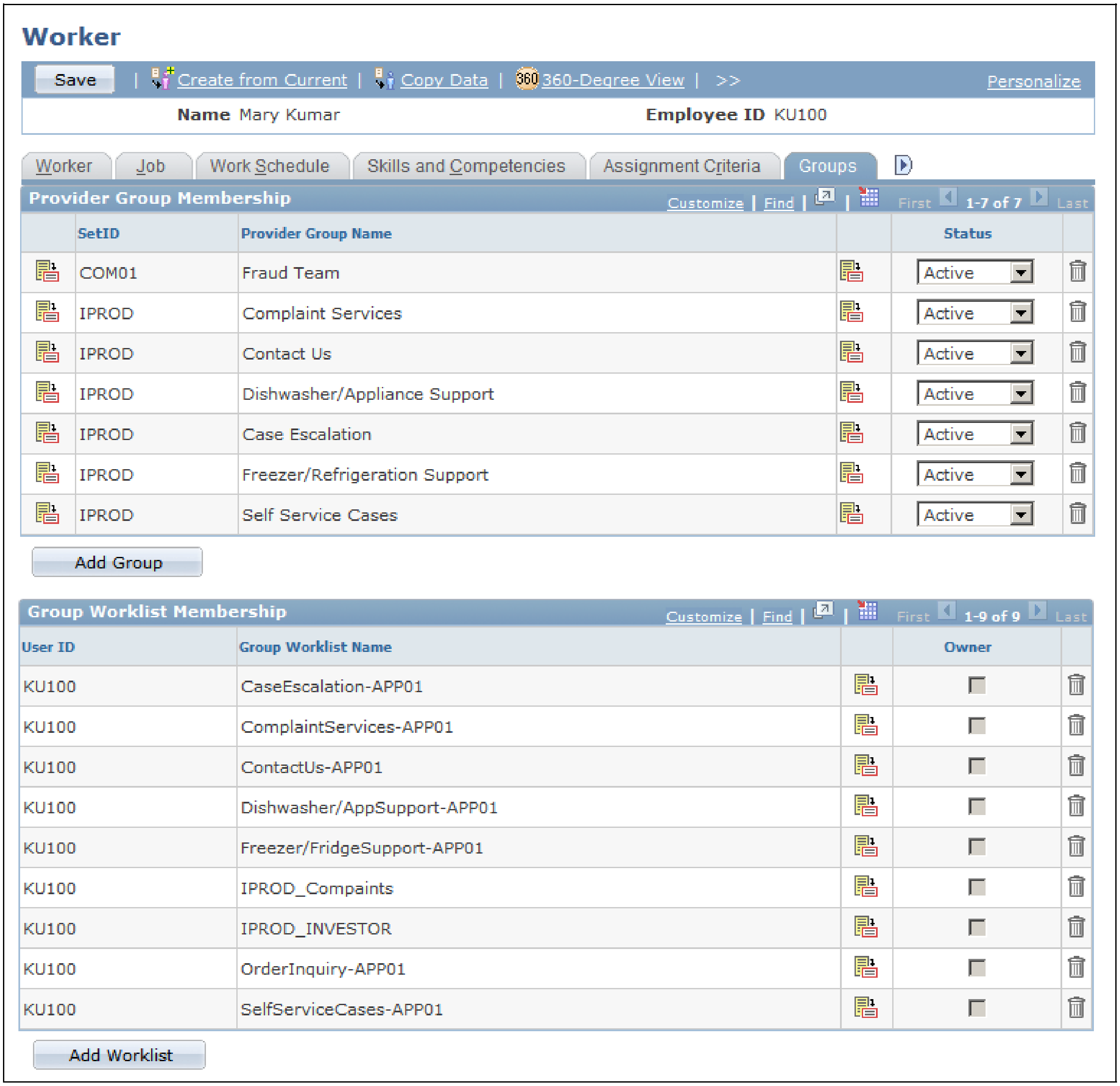
See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up and Performing Assignment Searches"

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up and Performing Assignment Searches," Reviewing and Assigning Group Members

Associating Workers with Provider Groups and Worklists

Access the Worker - Groups page (select the Groups tab from any page in the Worker component).



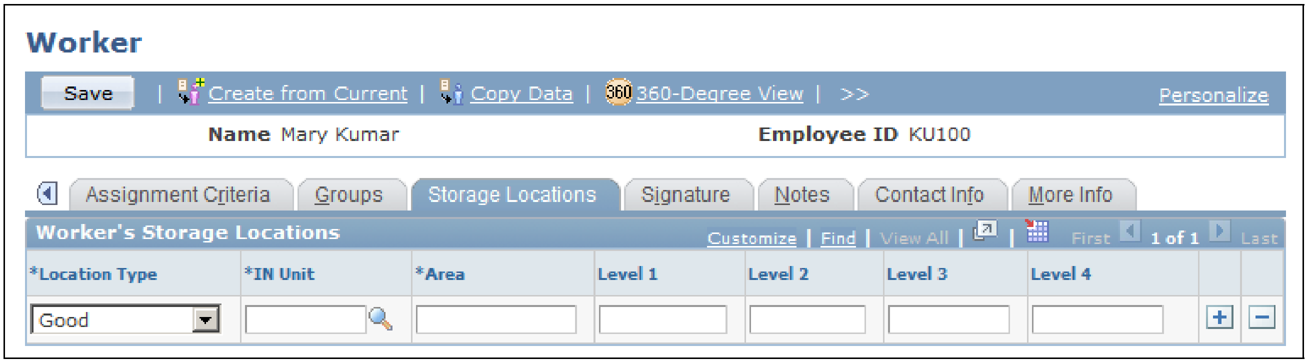
Worker - Groups page

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up and Maintaining Provider Groups and Group Members"

Defining Default Storage Locations

Access the Worker - Storage Locations page (select the Storage Locations tab from any page in the Worker component).



Worker - Storage Locations page

Storage location information is required only for workers who perform field service activities. Material movement transactions that are initiated from the Manage Material page in PeopleSoft FieldService update quantities in the inventory storage locations that are associated with the lead technician on the service order line.

You must define one and only one good truck stock location and one and only one defective truck stock location for each field service worker. The good and defective locations can't have the same storage location definition—the area and up to four storage levels—in PeopleSoft Inventory or a third-party inventory system.

Location Type

Select the type of material location that is on the truck. Values are:

Good: The location for material that is used to complete a service request at a customer's site.

Defective: The location of material that was removed from a customer's site. Typically, the worker returns this stock to the central distribution center for inspection or scrap processing.

IN Unit (inventory unit)

Enter the identification of the inventory business unit with the material storage location that corresponds to the material location type that is on the worker's truck. You define the inventory business unit in PeopleSoft Inventory or a third-party inventory system and insert it in the CRM system by using the Business Unit EIP.

See and Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," page 343.

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

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

Important! No prompts are available for the storage location definition fields Area,Level 1,Level 2,Level 3, and Level 4. Unlike business units, storage location information is not synchronized with an inventory system. You must know the correct storage location definitions to enter. Material movement transactions that are initiated from the Manage Material page are successfully recorded in the inventory system only if the storage location definition that you enter is a valid storage location for the inventory business unit that is referenced in the IN Unit field.

See Also

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

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

PeopleSoft Inventory 9.1 PeopleBook

Defining Default Signatures

Access the Worker - Signature page (select the Signature tab from any page in the Worker component).

In the Notification Signature field, enter the default signature that is used when someone sends manual notifications. When this person clicks the Notification button from a transaction and accesses the Outbound Notification page, this signature appears in the Message field.

Setting Up Foundational Data for Workers

To set up foundational data for workers, use the Location (LOCATION_TBL), Department (DEPARTMENT), Job Code (RB_JOB_CODE), and Cost Category (RF_COST_CAT) components.

This section discusses how to:

- Set up location codes.
- Set up department codes.
- Set up job codes.
- Set up cost categories.
- Set up competencies.

Note. In addition to worker-specific foundational data, worker records also reference general foundational data, such as setIDs, location codes, and salutation codes. For more information, refer to the table-loading sequence for the CRM application. You can find table-loading sequences for each product on the My Oracle Support web site.

See Also

Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," page 343

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

Pages Used to Set Up Foundational Data for Workers

Page Name	***Definition Name***	***Navigation***	***Usage***
Location	LOCATION_TBL	Set Up CRM, Common Definitions, Location, Location	Set up location codes.
Department	DEPARTMENT	Set Up CRM, Common Definitions, Employee Data, Department, Department	Set up information about the organization's departments.
Job Codes	RB_JOB_CODE	Set Up CRM, Common Definitions, Employee Data, Job Codes, Job Codes	Set up codes for the jobs in the organization.
Cost Categories	RF_COST_CAT	Set Up CRM, Common Definitions, Employee Data, Cost Categories, Cost Categories	Set up cost categories.
Worker Function	RD_WRK_FUNC_TBL	Set Up CRM, Common Definitions, Employee Data, Worker Functions, Worker Function	Set up worker functions.
Competencies	COMPETENCY_TABLE	Set Up CRM, Common Definitions, Competencies, Competencies, Competencies	Set up competencies.

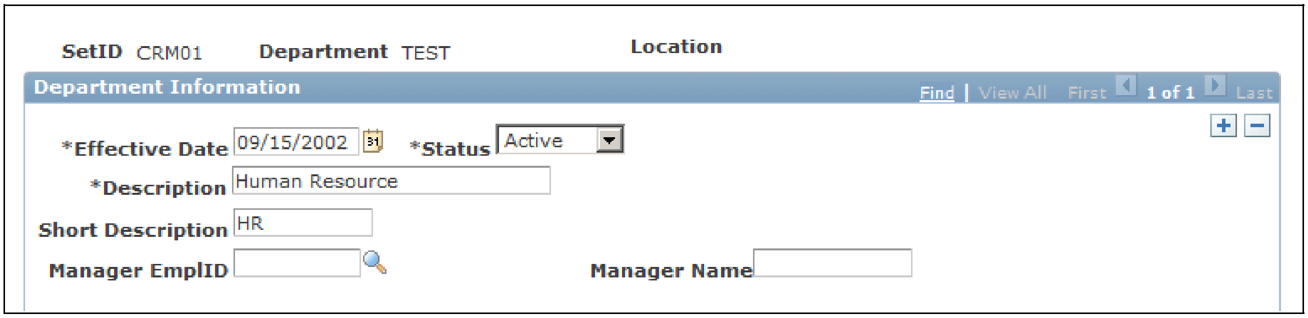
Setting Up Location Codes

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

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

Setting Up Department Codes

Access the Department page (Set Up CRM, Common Definitions, Employee Data, Department, Department).

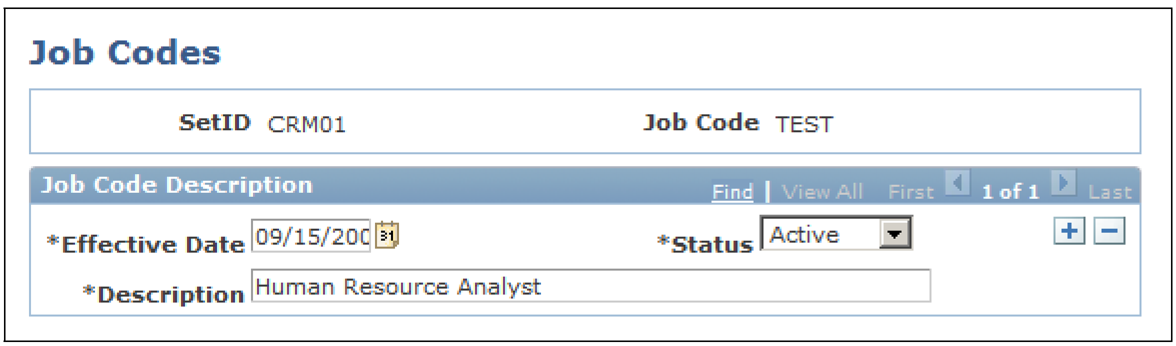


Department page

Note. Instead of entering information directly into CRM, you can maintain department codes in PeopleSoft HCM or a third-party system and move the department data to CRM by implementing the Department Table EIP.

Setting Up Job Codes

Access the Job Codes page (Set Up CRM, Common Definitions, Employee Data, Job Codes, Job Codes).

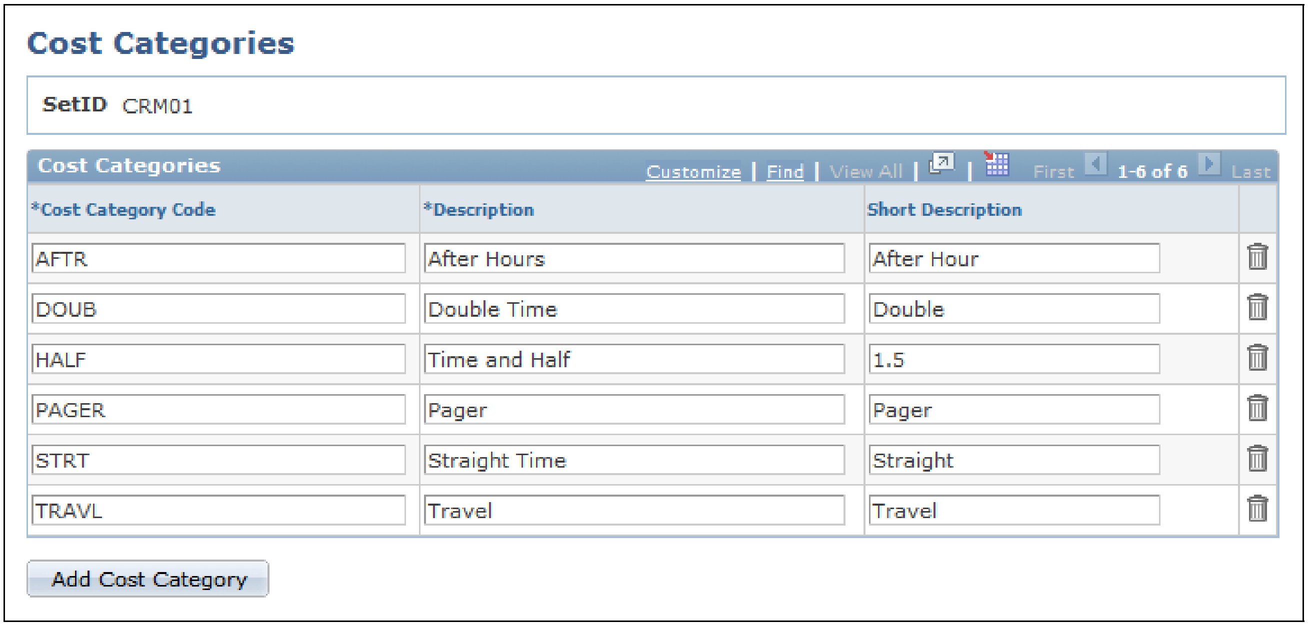


Job Codes page

You can also maintain job codes in PeopleSoft HCM or a third-party system and move the job code data to CRM by implementing the Job Code Table EIP.

Setting Up Cost Categories

Access the Cost Categories page (Set Up CRM, Common Definitions, Employee Data, Cost Categories, Cost Categories).



Cost Categories

SetID CRM01

Cost Categories — Customize | Find | View All | First 1-6 of 6 Last

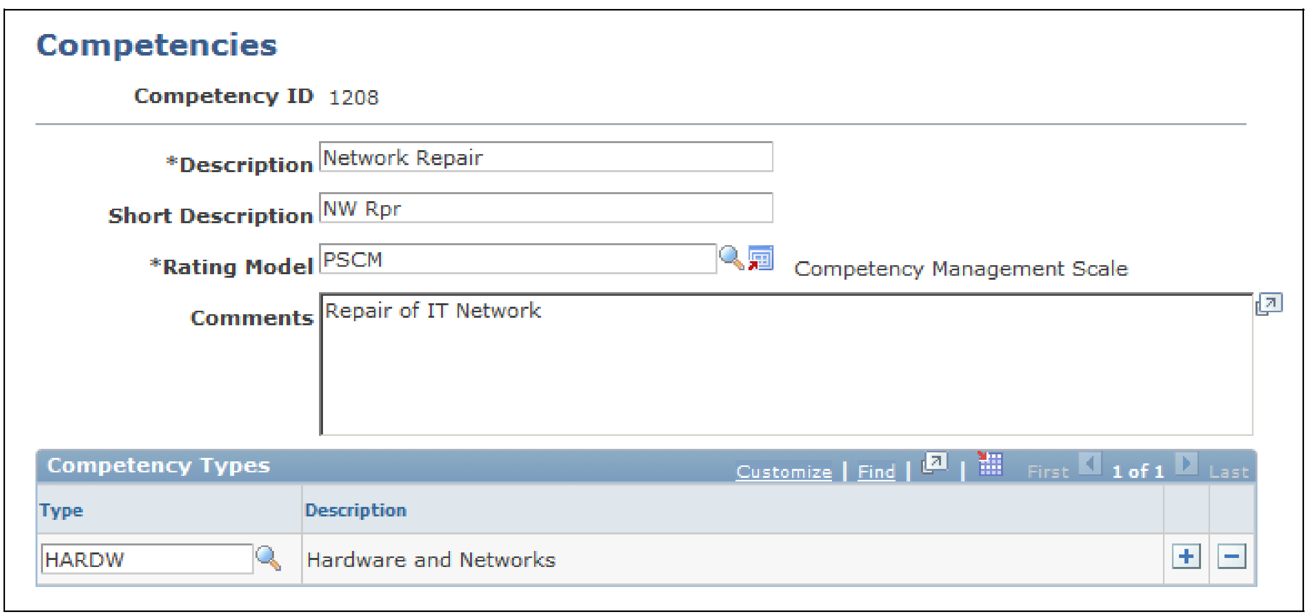
*Cost Category Code	*Description	Short Description
AFTR	After Hours	After Hour
DOUB	Double Time	Double
HALF	Time and Half	1.5
PAGER	Pager	Pager
STRT	Straight Time	Straight
TRAVL	Travel	Travel

Add Cost Category

Cost Categories page

Setting Up Competencies

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



Competencies

Competency ID 1208

*Description Network Repair

Short Description NW Rpr

*Rating Model PSCM Competency Management Scale

Comments Repair of IT Network

Competency Types — Customize | Find | First 1 of 1 Last

Type	Description
HARDW	Hardware and Networks

Competencies page

Worker competency information determines which workers are best qualified for assignment to a case or service order. CRM enables you to define competency information and associate it with workers by using competency codes. You can also maintain competency data in PeopleSoft HCM or a third-party system and move the competency data to CRM by implementing the following EIPs: Competency Type, Rating Model, and Competency.

See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook,* "Managing Workforce Competencies."

Part 5

Business Object Management

Chapter 13

Working with Predefined Business Object Search and Quick Create Data

This chapter discusses the predefined system data that is used by the business object (BO) search and quick create process.

Understanding Delivered System Data for BO Search and Quick Create

This section discusses the following delivered system data:

- Field definitions.
- Quick create definitions and templates.
- Search roles.
- Search definitions.
- Criteria fields.
- Adapter definitions.

Delivered System Data

PeopleSoft CRM delivers system data for business object searches and quick create definitions that are delivered as part of the PeopleSoft CRM suite of products. Before defining new searches or quick create definitions, examine the delivered system data to fully understand the setup requirements.

See and Chapter 15, "Setting Up Business Object Search and Quick Create," Understanding BO Search and Quick Create Setup, page 313.

Field Definitions

This section provides a summary list of the fields that are provided by PeopleSoft CRM. For more detail on how a field is defined in the system, access the Field page and search for the field description.

See and Chapter 15, "Setting Up Business Object Search and Quick Create," Defining Fields, page 317.

Field Description	***Field Name***	***Role Types***
Account	RBTACCTNO	• Contact (8) • Individual Consumer (9) • Account Owner (Individual) (65) • Account Owner (Organization) (66) • Account Owner (Rep.) (67) • Client (20012)
Account ID	RBTACCTID	• Contact (8) • Individual Consumer (9) • Sold To Organization (42) • Sold To Individual (46) • Account Owner (Individual) (65) • Account Owner (Organization) (66) • Account Owner (Rep.) (67) • Client (20012)
Address Address 1	CO_CONCAT ADDRESS 1	• Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)

Field Description	***Field Name***	***Role Types***
AGREEMENT ID	AGREEMENT_CODE	• Company (2) • Contact (8) • Individual Consumer (9)
ATM Card	ATM_CARD_NO	• Contact (8) • Individual Consumer (9)
Birthday	BIRTHDATE	• Contact (8) • Individual Consumer (9)
City	CITY	• Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
Company ID	COMPANYID	Partner (11)

Field Description	***Field Name***	***Role Types***
Country	COUNTRY	• Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
Created by	ROW_ADDED_OPRID	Worker(4)
Created Date	ROLE_START_DT	Worker(4)

Field Description	***Field Name***	***Role Types***
Currency	CURRENCY_CD	• Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47)
Customer ID	CUST_ID	• Company (2) • Individual Consumer (9) • Partner (11)
Department Name	DESCR	• Worker (4) • Person of Interest (88)
Email	CM_CONCAT	• Worker (4) • Contact (8)) • Individual Consumer (9) • Account Owner (Individual) (65) • Account Owner (Rep.) (67) • Person of Interest (88)
Employee ID	EMPLID	• Worker (4) • Person of Interest (88)

Field Description	***Field Name***	***Role Types***
Extension	EXTENSION	Worker (4)
Financial Account	FIN_ACCOUNT_ID	• Contact (8) • Individual Consumer (9)
First Name	FIRST_NAME	• Worker (4) • Contact (8) • Individual Consumer (9) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
Last Name	LAST_NAME	• Worker (4) • Contact (8) • Individual Consumer (9) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
Location Name	RC_LOC_DESCR	• Worker • Person of Interest (88)

Field Description	***Field Name***	***Role Types***
Name	BO_NAME_DISPLAY	• Person (1) • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88) • Organization (20008)
National ID	NATIONAL_ID	• Contact (8) • Individual Consumer (88) • Worker (4) • Person of Interest (88)

Field Description	***Field Name***	***Role Types***
Phone	CM_CONCAT	• Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
Physical Location	PHYSICAL_LOCATION	Worker (4)
PIN	PERSON_PIN	• Contact (8) • Individual Consumer (9)

Field Description	***Field Name***	***Role Types***
Postal	POSTAL	• Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
Serial Number	SERIAL_ID	• Company (2) • Contact (8) • Individual Consumer (9)
Service Phone	RBTPHONENUMBER	• Contact (8) • Individual Consumer (9)
SIN	SIN	• Company (2) • Site (3) • Individual Consumer (9)
Site ID	SITE_ID	Site (3)

Field Description	***Field Name***	***Role Types***
SSN/TIN	TIN	• Company (2) • Site (3) • Contact (8) • Individual Consumer (9) • Partnership (30) • Alternate Capacity (31)
State	STATE	• Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
Stock Symbol	STOCK_SYMBOL	Company (2)
Suffix	NAME_SUFFIX	Worker (4) Contact (8) Individual Consumer (9) Ship To Individual (45) Sold To Individual (46) Bill To Individual (47)

Field Description	***Field Name***	***Role Types***
TIN Type	TINTYPE	• Company (2) • Site (3) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31)

Quick Create Definitions and Templates

This section provides a summary list of the quick create definitions and quick create templates that are provided by PeopleSoft CRM. For more detail on a quick create definition or quick create template, access the Quick Create or Quick Create Template page and search for the quick create definition or quick create template definition.

See and Chapter 15, "Setting Up Business Object Search and Quick Create," Defining Quick Create Templates, page 321. and Chapter 15, "Setting Up Business Object Search and Quick Create," Setting Up Quick Create Definitions, page 324.

Quick Create Definition	***Quick Create Template***
RC FSI Contact	The FSI Alt Capacity with Cont
	The Company with Contact
	The FSI Partnership with Cont
	RC FSI Consumer with Contact
	RC FSI Consumer
RI Customer and Contact	The Company
	The Company with Contact
	The Company with Site (BC)
	The Consumer
	The Consumer with Contact
	The Consumer with Site (BC)

Quick Create Definition	***Quick Create Template***
RI Customer with Contact	The Company with Contact
	The Company with Site (BC)
	The Consumer with Contact
	The Consumer with Site (BC)
RSF Company	The Company (BC)
RSF Consumer	The Consumer (BC)
The Bill To Company	The Bill To Company
The Bill To Company and Cont	The Bill To Company
	The Bill To Company with Cont
The Bill To Company with Cont	The Bill To Company with Cont
The Bill To Consumer	The Bill To Consumer
The Bill To Consumer and Cont	The Bill To Consumer
	The Bill To Consumer with Cont
The Bill To Consumer with Cont	The Bill To Consumer with Cont
The Bill To Customer	The Bill To Company
	The Bill To Consumer
The Bill To Customer and Cont	The Bill To Company
	The Bill To Company with Cont
	The Bill To Consumer
	The Bill To Consumer with Cont
The Bill To Customer with Cont	The Bill To Company with Cont
	The Bill to Consumer
	The Bill To Consumer with Cont
The Company	The Company
The Company (BC)	The Company (BC)

Quick Create Definition	***Quick Create Template***
The Company and Contact	The Company
	The Company with Contact
The Company and Site	The Company
	The Company with Site (BC)
	The Site (ENG)
The Company with Contact	The Company with Contact
The Company with Site	The Company with Site (BC)
The Consumer	The Consumer
The Consumer and Contact	The Consumer
	The Consumer with Contact
The Consumer with Contact	The Consumer with Contact
The Consumer with Site	The Company with Site (BC)
The Contact	The Contact
The Customer	The Company
	The Consumer
The Customer and Contact	The Company
	The Company with Contact
	The Consumer
	The Consumer with Contact
The Customer with Contact	The Company with Contact
	The Consumer
	The Consumer with Contact
The Customer with Site	The Company with Site (BC)
	The Consumer with Site (BC)
The FSI Alt Capacity	The FSI Alt Capacity

Quick Create Definition	***Quick Create Template***
The FSI Alt Capacity with Cont	The FSI Alt Capacity with Cont
The FSI Company	The FSI Company
The FSI Company and Contact	The FSI Company
	The FSI Company with Contact
The FSI Company with Contact	The FSI Company with Contact
The FSI Consumer	The FSI Consumer
The FSI Consumer and Contact	The FSI Consumer
	The FSI Consumer with Contact
The FSI Consumer with Contact	The FSI Consumer with Contact
The FSI Cust (Org) and Cont	The FSI Alt Capacity
	The FSI Alt Capacity with Cont
	The FSI Company
	The FSI Company with Contact
	The FSI Consumer
	The FSI Consumer with Contact
	The FSI Partnership
	The FSI Partnership with Cont
The FSI Cust (Org) with Cont	The FSI Alt Capacity with Cont
	The FSI Company with Contact
	The FSI Consumer
	The FSI Consumer with Contact
	The FSI Partnership with Cont
The FSI Customer	The FSI Alt Capacity
	The FSI Company
	The FSI Partnership

Quick Create Definition	***Quick Create Template***
The FSI Partnership	The FSI Partnership
The FSI Partnership with Cont	The FSI Partnership with Cont
The FSI Site with Contact	The FSI Site with Contact
The OC Sold-To Cust and Contact	The Company with Site (BC)
	The Contact
	The Sold To Company
	The Sold To Company with Cont
	The Sold To Consumer
	The Sold To Consumer with Cont
The Ship To Company	The Ship To Company
The Ship To Company and Cont	The Ship To Company
	The Ship To Company with Cont
The Ship To Company with Cont	The Ship To Company with Cont
The Ship To Consumer	The Ship To Consumer
The Ship To Consumer and Cont	The Ship To Consumer
	The Ship To Consumer with Cont
The Ship To Consumer with Cont	The Ship To Consumer with Cont
The Ship To Customer	The Ship To Company
	The Ship To Consumer
The Ship To Customer and Cont	The Ship To Company
	The Ship To Company with Cont
	The Ship To Consumer
	The Ship To Consumer with Cont
The Ship To Customer with Cont	The Ship To Company with Cont
	The Ship To Consumer

Quick Create Definition	Quick Create Template
	The Ship To Consumer with Cont
The Site	The Site(ENG)
The Site with Contact	The Site with Contact
The Sold To Co. with Cont/Site	The Sold To Company
	The Sold To Company with Cont
	The Sold To Company with Site
The Sold To Company	The Sold To Company
The Sold To Company and Cont	The Sold To Company
	The Sold To Company with Cont
The Sold To Company with Cont	The Sold To Company with Cont
The Sold To Company with Site	The Sold To Company
	The Sold To Company with Site
The Sold To Cons with Con/Site	The Sold To Consumer
	The Sold To Consumer with Cont
	The Sold To Consumer with Site
The Sold To Consumer	The Sold To Consumer
The Sold To Consumer and Cont	The Sold To Consumer
	The Sold To Consumer with Cont
The Sold To Consumer with Cont	The Sold To Consumer with Cont
The Sold To Customer	The Sold To Company
	The Sold To Consumer
The Sold To Customer and Cont	The Sold To Company
	The Sold To Company with Cont
	The Sold To Consumer
	The Sold To Consumer with Cont

Quick Create Definition	***Quick Create Template***
The Sold To Customer with Cont	The Sold To Company with Cont
	The Sold To Consumer
	The Sold To Consumer with Cont
The Worker	The Worker
WM Client	WM Client

Search Roles

This section provides a summary list of the search roles that are provided by PeopleSoft CRM. For more detail on how a search role is defined in the system, access the Search Role page and search for the role.

See and Chapter 15, "Setting Up Business Object Search and Quick Create," Viewing Roles that Use a Search Field, page 320. and Chapter 15, "Setting Up Business Object Search and Quick Create," Associating Search Fields with a Role Type, page 325.

- 360 (COM) Company
- 360 (COM) Consumer
- 360 (COM) Cont of Company
- 360 (COM) Cont of Consumer
- 360 (ENG) Company
- 360 (ENG) Consumer
- 360 (ENG) Cont of Company
- 360 (ENG) Cont of Consumer
- 360 (FSI) Alternate Capacity
- 360 (FSI) Company
- 360 (FSI) Consumer
- 360 (FSI) Cont of Company
- 360 (FSI) Cont of Consumer
- 360 (FSI) Cont of Partnership
- 360 (FSI) Cont of Alt Cap
- 360 (FSI) Partnership
- 360 (GBL) Company

- 360 (GBL) Consumer
- 360 (GBL) Cont of Company
- 360 (GBL) Cont of Consumer
- 360 (GBL) Cont of Site
- 360 (GBL) Site
- 360 (INS) Consumer
- 360 (INS) Cont of Company
- 360 (INS) Cont of Consumer
- 360 Partner
- CDM Bill To Organization
- CDM Consumer with Cust ID
- CDM Contact
- CDM Copy Worker
- CDM Ship To Organization
- CDM Worker
- ERMS Consumer of Contact (DN)
- FS Company
- FS Consumer

FS Sold To Company

FS Sold To Consumer

- OC (COM/ENG) Company
- OC (COM/ENG) Consumer
- OC (COM/ENG) Cont of Sld To Co
- OC (COM/ENG) Cont of SldTo Con
- OC (COM/ENG) Sold To Co w/Prim
- OC (COM/ENG) Sold To Con
- OC Sold To Company
- RA Contact
- RA Worker (N)
- RB Recipient

- RB Representing
- RB Sender
- RC COM Consumer
- RC COM Contact of Company
- RC COM Contact of Consumer
- RC Company
- RC Company Site
- RC Consumer
- RC Consumer Site
- RC Consumer with PIN
- RC Contact (D)
- RC Contact of Alt.Capacity
- RC Contact of Company
- RC Contact of Company with PIN
- RC Contact of Consumer
- RC Contact of Consumer with PIN
- RC Contact of Partnership
- RC Contact of Site
- RC ENG Consumer
- RC ENG Contact of Company
- RC ENG Contact of Consumer
- RC FSI Consumer
- RC FSI Contact of Company
- RC FSI Contact of Consumer
- RC POI
- RC Site of Company
- RC Worker
- RC Worker Helpdesk
- RG Contact (N)
- RG Worker (N)

- RO Site
- RQ Contact (N)
- RQ Worker (N)
- RSF Client
- RSF Consumer
- RSF Contact
- RSF Contact of Company
- RSF Contact of Consumer
- RSF Partner
- RSF Worker (sales Rep)
- RV Account Owner (Ind)
- RV Account Owner (Org)
- RV Account Owner (Rep)
- RV Account Owner Company
- RV Account Owner Partnership
- RV Account Owner Person
- The Account
- The Account with Bill To (D)
- The Alt Capacity
- The Alt Capacity with Cust ID
- The Alt Capacity with Primary
- The Bill To Comp with Primary
- The Bill To Company
- The Bill To Cons with Primary
- The Bill To Consumer
- The Bill To Consumer (N)
- The Bill To Site
- The Company
- The Company of Contact (DN)
- The Company with Cust ID

- The Company with Primary
- The Consumer
- The Consumer (D)
- The Consumer (N)
- The Consumer of Contact (DN)
- The Consumer with Cust ID
- The Consumer with Primary
- The Contact
- The Contact of Account
- The Contact of Alt Cap
- The Contact of Alt Cap (D)
- The Contact of Bill To Comp
- The Contact of Bill To Comp (D)
- The Contact of Bill To Cons
- The Contact of Bill To Cons(D)
- The Contact of Company
- The Contact of Company (D)
- The Contact of Company (ND)
- The Contact of Company (NS)
- The Contact of Consumer
- The Contact of Consumer (D)
- The Contact of Consumer (ND)
- The Contact of Consumer (NS)
- The Contact of Partner
- The Contact of Partner (D)
- The Contact of Partner (ND)
- The Contact of Partner (NS)
- The Contact of Partnership
- The Contact of Partnership(D)
- The Contact of Ship To Comp

- The Contact of Ship To Comp(D)
- The Contact of Ship To Cons
- The Contact of Ship To Cons(D)
- The Contact of Site
- The Contact of Site (D)
- The Contact of Sold To Comp
- The Contact of Sold To Comp(D)
- The Contact of Sold To Cons
- The Contact of Sold To Cons(D)
- The Partner
- The Partner of Contact (DN)
- The Partner with Company ID
- The Partner with Primary
- The Partnership
- The Partnership with Cust ID
- The Person
- The Ship To Comp with Primary
- The Ship To Company
- The Ship To Cons with Primary
- The Ship To Consumer
- The Ship To Consumer (N)
- The Ship To Site
- The Site
- The Site of Company
- The Site of Company (D)
- The Site of Consumer (D)
- The Site of Consumer (N)
- The Site with Primary
- The Site with Site ID
- The Sold To Comp with Primary

- The Sold To Company
- The Sold To Cons with Primary
- The Sold To Consumer
- The Sold To Consumer (N)
- The Sold To Site
- The Worker
- The Worker (S Name)

Search Definitions

This section provides a summary list of the search definitions that are provided by PeopleSoft CRM. For more detail on how a search is defined in the system, access the Search page and search for the search definition that is listed below.

See and Chapter 15, "Setting Up Business Object Search and Quick Create," Defining BO Searches, page 328 .

- 360 BO all details (COM)
- 360 BO all details (ENG)
- 360 BO all details (FSI)
- 360 BO all details (GBL)
- 360 BO all details (INS)
- 360 Company (GBL)
- 360 Contact (COM)
- 360 Contact (ENG)
- 360 Contact (FSI)
- 360 Contact (GBL)
- 360 Organization (COM)
- 360 Organization (ENG)
- 360 Organization (FSI)
- 360 Organization (GBL)
- 360 Partner and Partner Cont
- 360 Partner Company
- 360 Person (COM)
- 360 Person (ENG)

- 360 Person (FSI)
- 360 Person (GBL)
- 360 Worker
- CDM Account Contact
- CDM Alt Capacity with Cust ID
- CDM Bill To Customer
- CDM Company with Cust ID
- CDM Consumer with Cust ID
- CDM Contact
- CDM Customer with Cust ID
- CDM Customer with Cust ID FSI
- CDM Partner
- CDM Partnership with Cust ID
- CDM Ship To Customer
- CDM Site
- CDM Worker
- CM Contact
- CM Contact of Company
- COM Company and Contact
- COM Contact
- COM Contact 2
- COM Contact Multiple
- COM Customer All Details
- ERMS ConfgSrchRecipient
- ERMS ConfgSrch Sender
- ERMS Contacts
- ERMS Customer and Partner
- ERMS Email - All (D)
- ERMS Email - External
- ERMS Email - External (D)

- ERMS Email - Partner
- ERMS Email - Partner (D)
- ERMS Search Contact
- ERMS Search Customer
- ERMS Worker and POI
- FS Company and Consumer
- FS Customer
- FS Customer All Details
- FS Modified Cust All Details
- FS Person
- FS Sold To
- FS Sold To Company and Cons
- FSI Customer
- FSI Customer and Contact
- OC (COM/ENG) Consumer
- OC (COM/ENG) Customer
- OC (COM/ENG) Sld to Prim
- OC (COM/ENG) Sold To Customer

  OC (ENG) Sold To Customer
- OC (FSI/INS) Customer
- OC Config Search Contact
- OC Sold To Company
- OC Sold To Customer
- RA Partner Contact
- RA Sponsor
- RA Sponsor no Partner
- RA Team
- RA Team no Partner
- RA Worker (N)
- RA Worker and Partner Contact

- RB Inbound Representing
- RB Inbound Sender
- RB Representing
- RB Representing QC
- RB Sender
- RB Sender QC
- RC COM Customer All Details
- RC COM Person
- RC COM Site and Person
- RC Company and Cons
- RC Company Site
- RC Company with Contact
- RC Config. Search Contact
- RC Contact
- RC Contact of Company
- RC Contact of Site
- RC Customer All Details

RC ENG Customer All Details

RC ENG Person

RC ENG Site and Person

RC FSI Account

- RC FSI Contact of Cust
- RC FSI Cust (Org) with Cont
- RC FSI Customer
- RC FSI Person

RC Partner Contact

- RC Person
- RC Person PIN Prompt
- RC Person with PIN
- RC Site

- RC Worker
- RC Worker Helpdesk
- RG Worker
- RG Worker and Contact
- RI Config Search Contact

  RI Contact of Customer (D)

  RI Customer

  RI Customer All Details
- RO Site
- RQ Worker (N)
- RQ Worker and Contact (N)
- RSF Assigned To
- RSF Contact
- RSF Contact Consumer
- RSF Contact Search
- RSF Customer
- RSF Customer No QC
- RSF Partner with Cont Multi
- RSF Referred By
- RSF Site
- RSF Site no QC
- RSF Worker
- RV Account Owner (Ind)
- RV Account Owner (Org)
- RV Account Owner (Rep)
- RV Account Owner Company
- RV Account Owner Partnership
- RV Account Owner Person
- The Account
- The Account with Bill To

- The Account with Prim Bill To
- The Account with Sold To
- The Alternate Capacity
- The Bill To Comp and Primary
- The Bill To Comp with Primary
- The Bill To Company
- The Bill To Company with Cont
- The Bill To Cons and Primary
- The Bill To Consumer
- The Bill To Consumer with Cont
- The Bill To Cust All Details
- The Bill To Customer
- The Bill To Customer (no QC)
- The Bill To Customer with Cont
- The Bill To Person
- The Company
- The Company (No QC)
- The Company and Primary
- The Company with Contact
- The Company with Primary
- The Company with Site
- The Consumer
- The Consumer and Primary
- The Consumer with Contact
- The Consumer with Primary
- The Contact of Bill To Comp
- The Contact of Bill To Comp(C)
- The Contact of Bill To Cons
- The Contact of Bill To Cons(C)
- The Contact of Bill To Cust

- The Contact of Bill To Cust(C)
- The Contact of Company
- The Contact of Company (C)
- The Contact of Consumer
- The Contact of Consumer (C)
- The Contact of Customer
- The Contact of Customer (C)
- The Contact of Partner
- The Contact of Partner (C)
- The Contact of Ship To Comp
- The Contact of Ship To Comp(C)
- The Contact of Ship To Cons
- The Contact of Ship To Cons(C)
- The Contact of Ship To Cust
- The Contact of Ship To Cust(C)
- The Contact of Sold To Comp
- The Contact of Sold To Comp(C)
- The Contact of Sold To Cons
- The Contact of Sold To Cons(C)
- The Contact of Sold To Cust
- The Contact of Sold To Cust(C)
- The Customer
- The Customer (No QC)
- The Customer All Details
- The Customer and Partner
- The Customer with Cont (no QC)
- The Customer with Contact
- The FSI (Org) Person
- The FSI Contact of Cust (Org)
- The FSI Contact of Cust (Org)C

- The FSI Cust (Org) with Cont
- The FSI Customer (Org)
- The FSI Organization
- The FSI Person
- The Organization Person
- The Partner
- The Partner (no QC)
- The Partner and Primary
- The Partner with Contact
- The Partner with Primary
- The Partnership
- The Person
- The Ship To Comp and Primary
- The Ship To Comp with Primary
- The Ship To Company
- The Ship To Company with Cont
- The Ship To Cons and Primary
- The Ship To Consumer
- The Ship To Consumer with Cont
- The Ship To Cust All Details
- The Ship To Customer
- The Ship To Customer (no QC)
- The Ship To Customer with Cont
- The Ship To Person
- The Site

  The Site of Company (C)

  The Site of Consumer (C)
- The Sold To Comp and Primary
- The Sold To Comp with Primary
- The Sold To Company

- The Sold To Company with Cont
- The Sold To Cons and Primary
- The Sold To Consumer
- The Sold To Consumer with Cont
- The Sold To Cust All Details
- The Sold To Customer
- The Sold To Customer with Cont
- The Sold To Person
- The Worker
- The Worker (no QC)
- The Worker and Cons with Cont
- WM Client

Criteria Fields

This section provides a summary list of the criteria fields that are provided by PeopleSoft CRM. For more detail on how a criteria field is defined in the system, access the Criteria page and search for the criteria description.

See and Chapter 15, "Setting Up Business Object Search and Quick Create," Defining Search Criteria Fields, page 331.

Criteria Description	**Field**
360 Degree View (COM)	First Name
	Last Name
	Customer ID
	Account
	Service Phone
	Phone
	Email
	Address
	City

Criteria Description	*Field*
	State
	Postal
	Country
360 Degree View (ENG)	Name
	First Name
	Last Name
	Customer ID
	Account
	Phone
	Email
	Address
	City
	State
	Postal
	Country
360 Degree View (FSI)	Name
	First Name
	Last Name
	Customer ID
	National ID
	Account
	Financial Account
	ATM Card
	Phone
	Email

Criteria Description	***Field***
	Address
	City
	State
	Postal
	Country
360 Degree View (GBL)	Name
	First Name
	Last Name
	Customer ID
	Phone
	Email
	Address
	City
	State
	Postal
	Country
360 Degree View (HRHD)	Employee ID
	First Name
	Last Name
	National ID
	City
	State
	Country
360 Degree View (INS)	Name
	First Name

Criteria Description	***Field***
	Last Name
	Customer ID
	National ID
	Account
	Financial Account
	Phone
	Email
	Address
	City
	State
	Postal
	Country
360 Degree View (ITHD)	Employee ID
	First Name
	Last Name
	Department Name
360 Degree View Partner	Name
	First Name
	Last Name
	Customer ID
	Phone
	Email
	Address
	City
	State

Criteria Description	***Field***
	Postal
	Country
CDM Bill To Customer	Name
	First Name
	Last Name
	Phone
	Email
	Customer ID
	Address
CDM Contact	First Name
	Last Name
	Phone
	Email
CDM Contact Company	Name
	Phone
	Email
	Customer ID
	Address
CDM Contact Customer	Name
	First Name
	Last Name
	Phone
	Email
	Customer ID
CDM Contact Customer FSI	Name

Criteria Description	***Field***
	First Name
	Last Name
	Phone
	Email
	Customer ID
CDM Person Partner	Name
	Phone
	Email
	State
	Postal
	Country
	Company ID
CDM Ship To Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	Customer ID
CDM Site	Name
	Address
	Phone
	Site ID
CDM Site Customer	Name
	First Name

Criteria Description	***Field***
	Last Name
	Phone
	Email
	Customer ID
CDM Site Customer FSI	Name
	First Name
	Last Name
	Phone
	Email
	Customer ID
CDM Worker	First Name
	Last Name
	Phone
	Email
	Person ID
	Employee ID
CDM Worker Asgmnt Customer	Name
	First Name
	Last Name
	Phone
	Email
CDM Worker With Created Date	First Name
	Last Name
	Phone
	Email

Criteria Description	***Field***
	Person ID
	Employee ID
	Created By
	Created Date
CM Contact	First Name
	Last Name
	Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
COM Contact	Name
	Last Name
	First Name
	Phone
	Email
COM Contact2	First Name
	Last Name
	Phone
	Email
	Address
	City

Criteria Description	***Field***
	State
	Postal
	Country
COM Contact Multiple	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
COM Customer	Name
	First Name
	Last Name
	Address
	City
	State
	Country
	Postal
	Account
	Service Phone
COM Customer	Name
	First Name
	Last Name

Criteria Description	***Field***
	Address
	City
	State
	Country
	Postal
	Account
	Service Phone
COM Customer 2	Name
	First Name
	Last Name
	Address
	City
	State
	Country
	Postal
	Account
	Service Phone
COM Person	First Name
	Last Name
	Service Phone
	Email
	Address
	City
	State
	Postal

Criteria Description	***Field***
COM Sold To Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	Postal
ERMS ConfgSrch Recipient	Name
	First Name
	Last Name
	Email
	Address
ERMS ConfgSrch Representing	Name
	First Name
	Last Name
ERMS ConfgSrch Sender	First Name
	Last Name
ERMS Email	Name
	First Name
	Last Name
	Address
ERMS Email - External	First Name
	Last Name
	Name

Criteria Description	***Field***
	Phone
	Email
	Address
	City
	State
	Postal
	Country
ERMS Email - External Represnt	Name
	Phone
	Address
	City
	State
	Postal
	Country
ERMS Email - Internal	First Name
	Last Name
	Email
	Phone
	Employee ID
ERMS Email - Partner	First Name
	Last Name
	Name
	Phone
	Email
	Address

Criteria Description	***Field***
	City
	State
	Postal
	Country
ERMS Email — Partner Represent	Name
	Phone
	Address
	City
	State
	Postal
	Country
ERMS Search Contact	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
ERMS Search Customer	Name
	First Name
	Last Name
	Phone
	Address

Criteria Description	***Field***
	City
	State
	Postal
	Country
ERMS Search Partner	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
ERMS Search Partner Contact	First Name
	Last Name
	Phone
	Email
	Address
	City
	Postal
	State
	Country
FS Config Search Customer	Name
	First Name

Criteria Description	***Field***
	Last Name
	Phone
	Address
	City
	State
	Postal
	Country
FS Config Search Sold To Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	Postal
	Country
FS Contact of Customer	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	***Field***
FS Contact of Sold To Customer	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
FS Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
FS Customer (No Contact)	Name
	First Name
	Last Name
	Phone
	Email
	Address

Criteria Description	***Field***
	City
	State
	Postal
	Country
FS Employee	Employee ID
	First Name
	Last Name
	Department Name
	Location Name
	Physical Location
	Phone
	Email
FS Partner	Name
	First Name
	Last Name
	Phone
	Email
	Address
FS Partner Company Contact	First Name
	Last Name
	Phone
	Email
	Address
FS Provider Group Customer	Name
	First Name

Criteria Description	***Field***
	Last Name
	Phone
	Email
FS Sold To Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
FS Sold To Customer (No Cont)	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
FS Sold To Customer (Split)	Name
	First Name

Criteria Description	***Field***
	Last Name
	Phone
	Email
FS Worker	First Name
	Last Name
	Department Name
	Location Name
	Phone
	Email
FSI Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	PIN
FSI Customer and Contact	Name
	First Name
	Last Name
	First Name
	Last Name
	Phone
	Address
	City

Criteria Description	***Field***
	State
	PIN
FSI Person	First Name
	Last Name
	Address
	City
	State
	PIN
	Phone
OC (COM/ENG) Consumer	First Name
	Last Name
	Account
FSI (COM/ENG) Customer	Name
	Account ID
	First Name
	Last Name
	Phone
	Address
OC (FSI/INS) Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City

Criteria Description	***Field***
	State
OC Capture Partner Contact	First Name
	Last Name
	Phone
	Email
	Address
OC Contact of Partner	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
OC Contact of Sold To Customer	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
OC Order Capture Partner	Name

Criteria Description	***Field***
	First Name
	Last Name
	Phone
	Email
	Address
OC Sold To Cont (Config. Srch)	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
OC Sold To Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	Postal
	Country
RA Owner Partner Contact	Name
	First Name

Criteria Description	***Field***
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RA Owner Worker	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RA Owner Worker/Partner Cntct	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RA Partner Only	Name
	City
	State
	Postal
	Country
RA Recipient	Name

Criteria Description	***Field***
	First Name
	Last Name
	Email
	Address
	City
	State
	Postal
	Country
RA Recipient no Partner	Name
	First Name
	Last Name
	Email
	Address
	City
	State
	Postal
	Country
RA Sponsor	Name
	Last Name
	First Name
	Email
	Address
	City
	State
	Postal

Criteria Description	***Field***
RA Sponsor no Partner	Name
	Last Name
	First Name
	Email
	Address
	City
	State
	Postal
RA Team	Name
	First Name
	Last Name
	Email
	Address
	City
	State
	Postal
	Country
RA Team no Partner	Name
	First Name
	Last Name
	Email
	Address
	City
	State
	Postal

Criteria Description	***Field***
	Country
RB Inbound Representing	Name
	First Name
	Last Name
RB Inbound Sender	Name
	First Name
	Last Name
	Email
RB Representing	Name
	Customer ID
RB Representing QC	Name
	Customer ID
RB Sender	First Name
	Last Name
	Phone
	Email
	Address
RB Sender QC	First Name
	Last Name
	Phone
	Email
	Address
RBC recipient search	Name
	First Name
	Last Name

Criteria Description	***Field***
	Email
	Address
RC Bill To Contact	Name
RC Bill To Customer	Name
	Last Name
	First Name
	Phone
	Email
	Address
	City
	State
	Country
RC COM Customer	Name
	First Name
	Last Name
	Address
	City
	State
	Country
	Postal
	Account
	Service Phone
RC Company Site	Name
	Address
	SIN

Criteria Description	***Field***
RC Config. Search Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	Postal
	Country
RC Contact	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
RC Contact Note	First Name
	Last Name
	Phone
	Email
	Address
	City
	State

Criteria Description	***Field***
	Postal
	Country
RC Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
	PIN
	SIN
	Serial Number
	Agreement ID
RC Customer (name split)	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal

Criteria Description	***Field***
	Country
	PIN
	SIN
	Serial Number
	Agreement ID
RC Customer Note	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
RC Employee	Employee ID
	First Name
	Last Name
	Department Name
	Location Name
	Physical Location
	Phone
	Email
RC Employee Config.Search	Employee ID
	First Name

Criteria Description	***Field***
	Last Name
	Department Name
	Location Name
	Physical Location
	Phone
	Email
RC ENG Customer	Name
	First Name
	Last Name
	Address
	City
	State
	Country
	Postal
	Account
RC FSI Contact	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
RC FSI Customer	Name

Criteria Description	***Field***
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
	Account
RC GOV Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Country
RC HR Employee	Employee ID
	National ID
	First Name
	Last Name
	Department Name
	Location Name

Criteria Description	***Field***
	Physical Location
	Phone
	Email
	City
	State
	Country
RC Partner	Name
	First Name
	Last Name
	Phone
	Email
	Address
RC Person Config.Search	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
RC Person PIN	First Name
	Last Name
	PIN
RC Report Customer	Name

Criteria Description	***Field***
	First Name
	Last Name
	Address
RC Site	Name
	Address
	State
	City
	Country
	Postal
RG Employee	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RG Employee and Contact	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RG Owner	First Name
	Last Name
	Phone
	Email

Criteria Description	***Field***
	Employee ID
	Person ID
RG Requester	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RI Customer	Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
RI Interaction View	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal

Criteria Description	***Field***
	Country
	Customer ID
RI Person Config.Search	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
RO Site	Name
	Address
	City
	State
	Postal
	Country
	Site ID
RQ Employee	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID

Criteria Description	***Field***
RQ Worker and Contact	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RSF Assigned To	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
RSF Client	Salutation
	First Name
	Middle Name
	Last Name
	Suffix
RSF Contact Search	First Name
	Last Name
	Phone
	Address

Criteria Description	*Field*
RSF Customer No QC	Name
	First Name
	Last Name
	Phone
	Address
RSF Lead Import Customer	Name
	First Name
	Last Name
	Phone
	Address
RSF Partner	Name
	First Name
	Last Name
	City
	State
	Postal
	Country
RSF Partner Rep	Name
	First Name
	Last Name
	City
	State
	Postal
	Country
RSF Referred By (worker/cons)	First Name

Criteria Description	***Field***
	Last Name
	Phone
	Email
	Set ID
RSF Sales Contact	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	Postal
	State
	Country
RSF Sales Customer	Name
	First Name
	Last Name
	Phone
	Address
RSF Sales Customer No QC	Name
	First Name
	Last Name
	Phone
	Address
RSF Sales Rep (Worker)	First Name

Criteria Description	***Field***
	Last Name
	Phone
	Email
	Address
RSF Site	Name
	Address
	City
	State
	Postal
	Country
	Site ID
RSF Site no QC	Name
	Address
	City
	State
	Postal
	Country
	Site ID
The Alt Capacity	Name
	Address
	City
	State
	Postal
	Country
The Bill To Company	Name

Criteria Description	***Field***
	Address
	City
	State
	Postal
	Country
The Bill To Consumer	First Name
	Last Name
	Email
	Phone
	Address
	City
	State
	Postal
	Country
The Company	Name
	Address
	City
	State
	Postal
	Country
The Consumer	First Name
	Last Name
	Email
	Phone
	Address

Criteria Description	***Field***
	State
	City
	Postal
	Country
The Contact	First Name
	Last Name
	Email
	Phone
	Address
	City
	State
	Postal
	Country
The Contact of Partner (C)	First Name
	Last Name
	City
	State
	Postal
	Country
The Partner	Name
	First Name
	Last Name
	City
	State
	Postal

Criteria Description	***Field***
	Country
The Partnership	Name
	Address
	City
	Country
	State
	Postal
The Person	First Name
	Last Name
	Email
	Phone
	Address
	City
	State
	Postal
	Country
The Ship To Company	Name
	Address
	City
	State
	Postal
	Country
The Ship To Consumer	First Name
	Last Name
	Email

Criteria Description	*Field*
	Phone
	Address
	City
	State
	Postal
	Country
The Site	Name
	Address
	City
	State
	Postal
	Country
	Phone
	Site ID
The Site of Company (C)	Name
	Address
	Phone
	State
	Postal
	Country
	Phone
	Site ID
The Site of Consumer (C)	Name
	Address
	Phone

Criteria Description	***Field***
	State
	Postal
	Country
	Phone
	Site ID
The Sold To Company	Name
	Address
	City
	State
	Postal
	Country
The Sold To Consumer	First Name
	Last Name
	Email
	Phone
	Address
	City
	State
	Postal
	Country
The Worker	First Name
	Last Name
	Email
	Employee ID
	Person ID

Criteria Description	*Field*
	Phone
WM Client	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal

Adapter Definitions

This section provides a summary list of the adapter definitions that are provided by PeopleSoft CRM. For more detail on how each adapter is defined in the system, access the Adapter page and search for the adapter description.

See and Chapter 15, "Setting Up Business Object Search and Quick Create," Defining Fields for Transaction Subpages, page 334. and Chapter 15, "Setting Up Business Object Search and Quick Create," Specifying Basic Search Criteria Fields, page 332.

- 360 Communication
- 360 Energy
- 360 Financial Services
- 360 Global
- 360 HRHD
- 360 Insurance
- 360 ITHD
- 360 Partner
- CDM Alternate Capacity
- CDM Company
- CDM Partner
- CDM Partner Distributed Sec

- CDM Partnership
- CDM Person
- CDM Relationship Viewer
- CDM Service Location
- CDM Site
- CDM Worker
- CDM Worker Copy
- CDM Worker Create

CM Call Report

CM Contact Group

CM Task Detail

COM Account

COM Account Member

- ERMS ConfgSrch Inbound Email
- ERMS ConfgSrch Outbound Email
- ERMS Email - External
- ERMS Email - Internal
- ERMS Email - Partner
- ERMS Outbound Email
- ERMS Search HelpDesk Case
- ERMS Search OrderCaseSale etc
- ERMS Search Recipient
- ERMS Search Service Order
- FS Agreement External Create
- FS Agreement External Update
- FS Agreement Internal
- FS Agreement Search
- FS Dispatch Performance
- FS Expenses by Customer
- FS Installed Asset

- FS Installed Asset Search
- FS Installed Product Create
- FS Installed Product Search
- FS Installed Product Update
- FS Material Orders Search

  FS Material Orders TechSearch
- FS Mean Time to Repair
- FS My Service Order
- FS My Service Order Search
- FS Provider Group
- FS Review PM Search
- FS Service Order Aging
- FS Service Order Create
- FS Service Order Search
- FS Service Order Update
- FS Set Up Tree
- FSI Access Trace Search
- FSI Billing Account
- FSI Financial Account Search
- FSI Modify Account
- FSI Review Modify Account
- FSI Security Matrix Search
- INS Financial Account Search
- OC (COM/ENG) Customer
- OC (FSI/INS) Customer
- OC Customer Srch (Search Page)
- OC Order Capture
- OC Order Capture (PARTNER)

- OC RX Site

PIM Search OrderCaseSale etc

PIM Synched Email - External

- RA Audience
- RA Marketing
- RA Marketing Calendar
- RA Marketing Content
- RA Marketing no Partner
- RA Marketing Offers
- RA Marketing Partner
- RA Mkt Calendar no Partner
- RBC Correspondence Search
- RC Case Related Cases Search
- RC Case Search
- RC Communications

RC Energy

- RC Financial Services
- RC Government
- RC Helpdesk
- RC HRHelpdesk
- RC Report Case by Age
- RC Report Cases by Customer
- RC Report Cases by Priority
- RC Report Service Level Mgmt
- RC RMA
- RC Support
- RG Change Management
- RI Interaction List Search
- RI Interaction Personalize
- RQ Quality Defects

- RQ Quality Defects Setup
- RQ Quality Fixes
- RSF Leads
- RSF Opportunity
- RSF Sales Lead Import Results
- RSF Search Leads
- RSF Search Opportunities
- RSF Search Referrals
- RY Dialogs Marketing Objects
- RY Dialogs no Partner
- RY Dialogs Partner
- WM Asset/Liability
- WM Client at Risk
- WM Client Relationship
- WM Household Mem'ber
- WM Product of Interest

Chapter 14

Using Business Object Search and Quick Create Functionality

This chapter provides an overview of the business object search and quick create process and discusses how to:

- Search for business objects.
- Create business objects by using the Quick Create component.

Understanding the Business Object Search and Quick Create Process

This section discusses:

- Business object search.
- Customer identification.
- Quick create functionality.
- BO search and Quick Create runtime example.

Business Object Search

When users create a transaction in PeopleSoft CRM and do not know the specific value for a business object that the transaction uses, they can invoke a business object search to find the field value. The system determines the information that is needed depending on the page where the business object search was initiated and searches for the business object.

If the business object is not uniquely identified from the information that the user enters, a search page that contains both a list of objects that are potential matches and additional search fields appears.

See Also

Chapter 13, "Working with Predefined Business Object Search and Quick Create Data," page 223

Chapter 14, "Using Business Object Search and Quick Create Functionality," Identifying Customers for Transactions, page 306

Chapter 15, "Setting Up Business Object Search and Quick Create," Adding and Modifying BO Search and Quick Create Definitions, page 316

Customer Identification

The customer identification framework uses business object search to provide an easy and consistent way to identify the customer—company, partner, consumer, contact, or site—for a transaction.

Each transaction page has one or more subpages that contain the fields for entering customer, contact, and other information such as phone, site, identification number, or account number.

The subpages that appear and fields that appear on each subpage vary depending on the information that each transaction needs. For example, the customer information fields for order capture are Customer,First Name, and Last Name while the fields for creating a support case are Company,First Name,Last Name, and SIN (Service Identification Number). The customer information subpage might have one or two columns, depending on the needs of the page layout. Additional subpages might appear with partner information or worker information

The user enters information in one or more fields and initiates a search. If a business object that uniquely matches the criteria that are entered is found, it is returned to the customer information subpage. If not, a page containing additional search criteria and a list of potential matches appears. The user can:

- Select a record.
- Refine the search criteria and search again.
- Create a new object using quick create.

Quick Create Functionality

The quick create functionality in PeopleSoft CRM enables users to create business objects quickly and easily without navigating to the business object components. This functionality is available either from within a PeopleSoft CRM application or by using the standalone Quick Create component.

Quick create definitions that are set up in the system and associated with transactions enable users to enter the subset of business object information that is required to define a business object and save it to the database. The business object information that is created is returned to the application so that the business process can continue. Some quick create definitions are set up to create more than one business object and the relationships between the business objects at the same time. For example, the *The Company with Contact* definition creates both a company and a contact.

You access the Quick Create component:

- As a standalone component by selecting Customers CRM.

- From the business object search page within a PeopleSoft CRM transaction.
- Directly from a PeopleSoft CRM application component, such as the Create Order transaction.

BO Search and Quick Create Runtime Example

For example, a call center agent might receive a call from a contact named Larry Hill who represents a customer company named MMA Property Management. The agent opens a case and searches for a company name of MMA with a last name of Hill.

If the information that the agent enters does not uniquely identify a customer and contact, the advanced search page appears. This page contains both expanded search criteria fields and a search results section that lists all companies whose name begins with the letters MMA that are represented by a contact with a last name of Hill. The agent can then:

- Select the correct company and contact combination.
- Enter additional search criteria, and search again.
- Define a new company with contact.

  This option uses the quick create feature.

BO Search System Processing

The following tasks occur without the user being aware of them:

- The transaction adapter determines, based on the transaction, what fields appear on the customer information subpage and the criteria definition that defines the advanced search page.
- The criteria definition determines what criteria fields appear on the advanced search page, how they appear, and the search definitions to invoke.
- The search definition determines the roles to search for the criteria fields, the fields that appear in the search results, how the search results appear, and the quick create definition that the user accesses to create a new business object.
- For each role that is searched, the search role determines the security that is applied, the relationships for the role, and whether fields appear in the search criteria or results that are set for the role.
- The field definitions determine how the search fields appear on the page, the database records that are searched for each field, and how the user can search for the field.

Quick Create System Processing

The following tasks occur without the user being aware of them:

- The quick create definition determines which quick create templates to display to the user.
- The quick create template definitions determine both the fields that appear on the quick create page and the criteria that are used to search for existing objects of the type that is defined.

See Also

Chapter 13, "Working with Predefined Business Object Search and Quick Create Data," Understanding Delivered System Data for BO Search and Quick Create, page 223

Searching for Business Objects

This section discusses how to:

- Identify customers for transactions.
- Search for business objects.

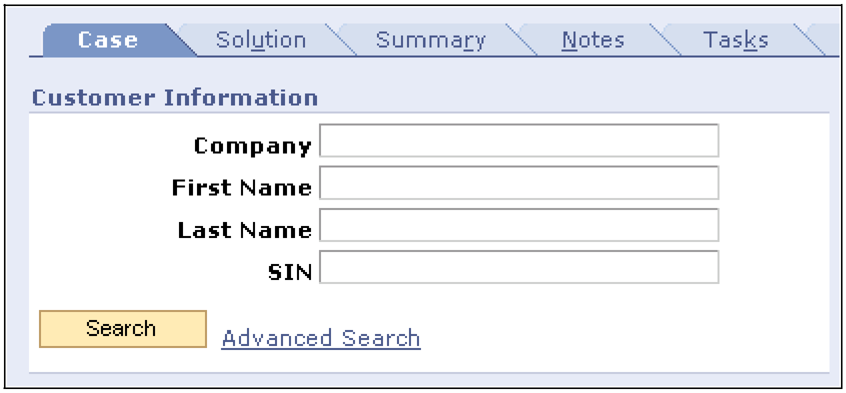
Pages Used to Search for Business Objects

Page Name	Definition Name	Navigation	Usage
Search For <object>	RBQ_BOSRCH	• Customers CRM, Business Object Search • Enter customer information in any Customer Information group box on a transaction. • Click the Advanced Search link on any page that is enabled for BO search. • Click the search icon next to any field on a PeopleSoft CRM component or on transaction pages that are enabled for BO search.	Search for a business object in the PeopleSoft CRM database.

Identifying Customers for Transactions

Access the customer information subpage on any transaction that is enabled for customer identification.

Note. The example shown is from the Add Case component. The fields that appear in the Customer Information page region are specific to Case searches. Other components that use this feature function similarly, although the fields might vary.



Case page

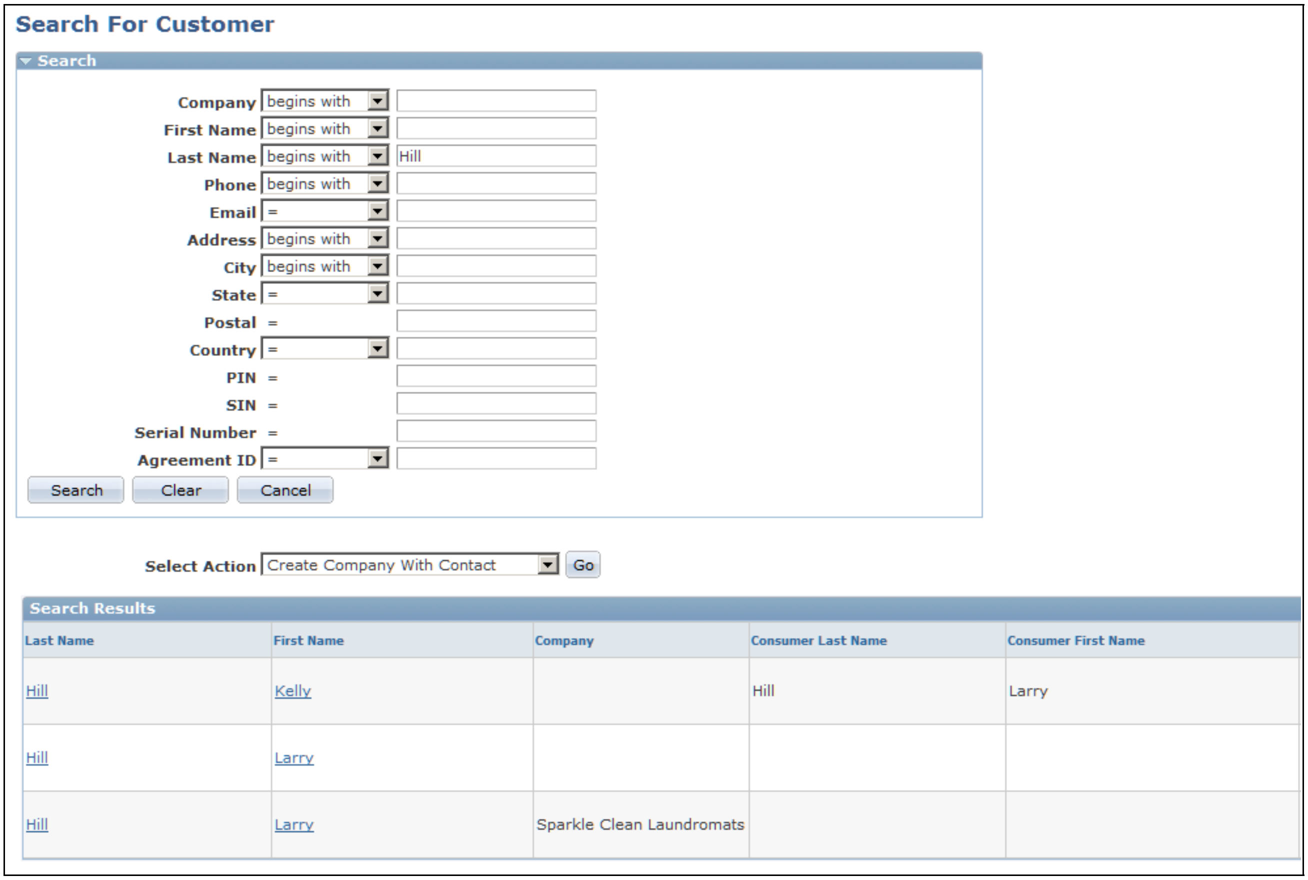
Enter any information that you know and click Search. If the customer is not uniquely identified by the information that you enter, an advanced search page appears. You can also click the Advanced Search link to access the Search for <object> page.

Advanced Search

When you initiate the advanced search, the Search for <object> page appears. This page enables you to refine the search fields that you enter on the customer information subpage. This page contains additional search criteria and, depending on how the search criteria are set up, a link that accesses a quick create page to create a new business object or objects.

Searching for Business Objects

Access the Search For <object> page (Customers CRM, Business Object Search).



Search For Customer page

This page is identical to the advanced search pages that appear for customer identification. This page contains additional search criteria. In the example above, the user can create a new company with a contact.

Select Action

Select a listed action and click Go to access a Quick Create page where you can create a new business object of the type for which you are searching.

This field appears only if the quick create option is defined for the business object search that you initiated. The available actions are also determined by the business object search definition. If there is only one quick create option defined for the search, then a link to the Quick Create page appears.

Search Results

If more than one business object meets the search criteria, the Search Results grid appears. The results are either:

- Single-select.

  With single-select , one and only one business object can be returned from the search. The results appear in a list with each item identified as a link. When you click the link, the item is returned to the field from which the search was initiated.

- Multi-select.

  With multi-select, more than one business object can be returned from the search. A check box appears next to each item. You select the desired items or click the Check All/Clear All link, then click the Select button to return the items to the calling page, where they appear in a grid.

Creating Business Objects by Using the Quick Create Component

This section discusses how to create business objects by using quick create functionality.

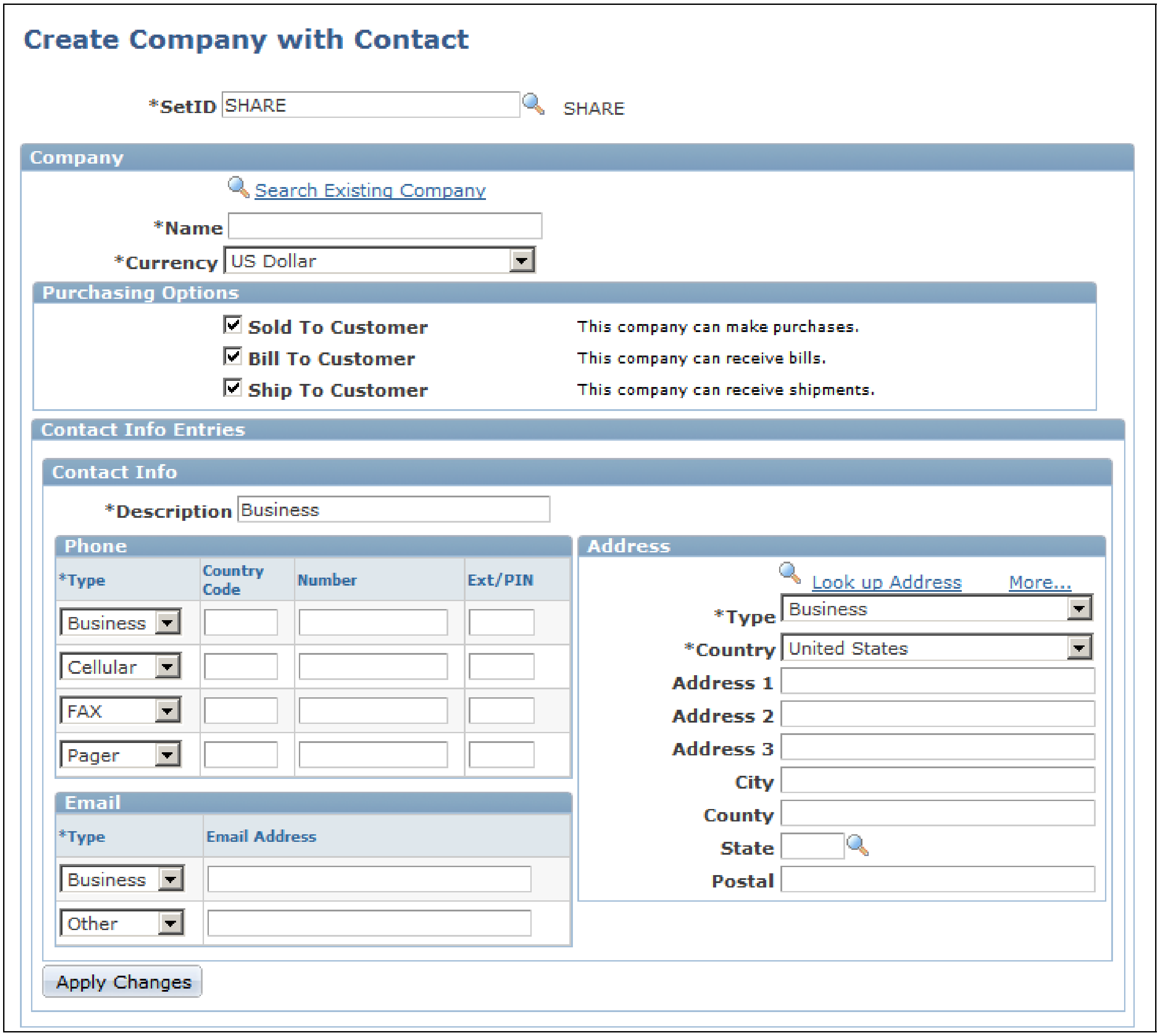
Note. The functionality of the Quick Create page is flexible and enables you to create as many business objects as you want without leaving the page.

Page Used to Create Business Objects by Using Quick Create Functionality

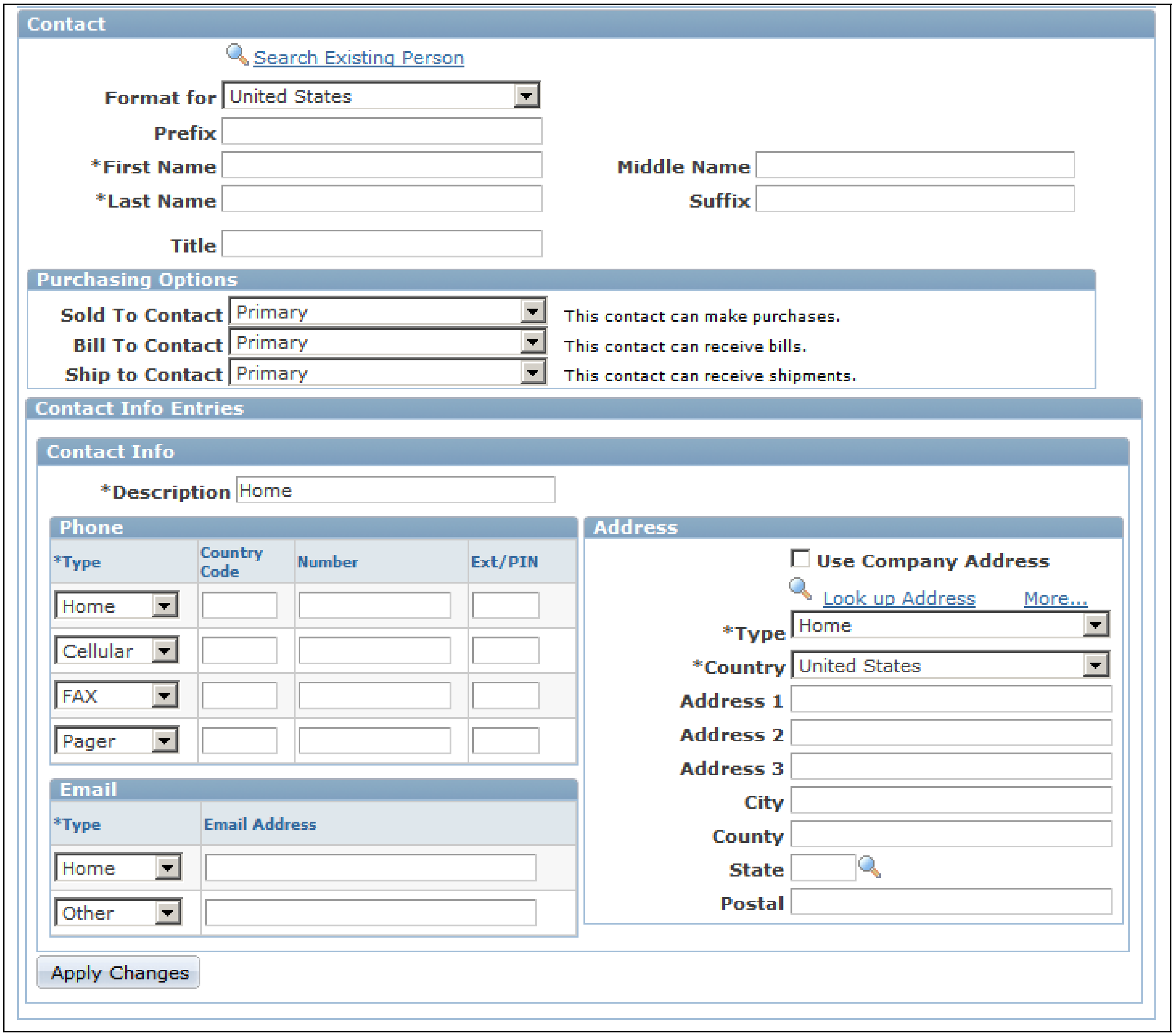
Page Name	*Definition Name*	*Navigation*	*Usage*
Create <quick create definition name>	RBQ_QCREATE	• Customers CRM, Quick Create, Quick Create • Click the link or Go button next to the Create New field on the business object lookup page. • Click the Create New button on a PeopleSoft CRM application page.	Create business objects.

Creating Business Objects by Using Quick Create Functionality

Access the Create <quick create definition name> page (Customers CRM, Quick Create, Quick Create).



Example of creating company contacts on the Creating Company with Contact page (1 of 2)



Example of creating company contacts on the Creating Company with Contact page (2 of 2)

These screenshots show the quick create page for the Company with Contact definition. Most quick create pages look identical for they use common group boxes and fields to collect information. Some pages contain additional fields to capture data that is specific to the corresponding business objects.

Refer to the Defining Person Business Objects chapter for field descriptions of these common group boxes and fields.

SetID

Enter the setID for the objects that you are creating. This field appears only for objects that are controlled by a setID and is defined on the quick create definition.

Search Existing <object>

Click this link to search for existing business objects that match the information that you entered. For example, if you enter a company name of *MMA*, you can search for existing companies whose names start with MMA. This helps to ensure that you do not enter duplicate data.

Clear	Click to clear the section of the Quick Create page.

Quick Create Process upon Save

When you save the Quick Create page, the system:

1. Verifies that all *required* fields are present.

   If not, then the system returns an error message.

2. Creates the business object for each role that is present on the Quick Create page that has data.

   For example, if the Quick Create page enables you to create a company and contact, but entering a contact is optional, then you can create a company without a contact. The contact is created only if you also enter contact data.

3. Creates the relationship between multiple roles if the information for these roles is present and the relationship between these roles is set up in the quick create template.

   For example, if the quick create template enables you to create a company and a contact for the company at the same time, and also has a relationship set up between the two roles on the template, then when you enter the different roles and their information on the Quick Create page, both the company and the contact are created and the contact is linked to the company.

4. Returns newly created data to the calling application if you access the Quick Create page from a PeopleSoft CRM application.

   If you are in the standalone Quick Create component, then you remain on the Quick Create page after you save.

See Also

Chapter 11, "Defining Person Business Objects," page 167

Chapter 12, "Defining Workers," Creating Workers Using the Quick Create Function, page 198

Chapter 15

Setting Up Business Object Search and Quick Create

This chapter provides an overview of the business object (BO) search and quick create definition process and discusses how to define BO searches and quick create pages.

Understanding BO Search and Quick Create Setup

This section lists common elements and discusses:

- BO search runtime process.
- Quick create runtime process.
- BO search and quick create setup process.

Common Elements Used in this Chapter

Field

Search fields are common objects that are used in BO search and quick create definitions. A field definition specifies the location of the field in the database, how the system searches for the field, the label of the field on the user interface, and how the field is updated by quick create.

Fields are used in the following BO search and quick create elements:

- Search roles.
- Search definitions.
- Search criteria.
- Transaction adapter.
- Quick create templates.

Quick Create Template

A quick create template associates the fields that are entered with the business object roles that are updated when a user creates a business object using quick create. The criteria definition specifies the search criteria page on which quick create definitions that this template is associated with appear.

Quick Create Definition	A quick create definition is composed of one or more templates that appear to the user when the quick create definition is invoked. You can use the same quick create template in more than one definition.
Search Role	A search role definition associates field definitions to one or more role type. When user search for a field, only business objects that have a role that is associated with the field are returned in the search results. Search roles are used in search definitions.
Search Definition	A search definition is a collection of search roles and quick create definitions. Search definitions specify the roles and fields that are searched for data that a user enters. If you specify a quick create definition on the search definition, then the quick create definition is enabled on the search results page. You use search definitions in search criteria.
Search Criteria	Search criteria specify the search definitions that are invoked when the user enters data in certain fields on a component. You can specify a default search definition and up to four alternate definitions. You then select fields and associate each field with one or more search definitions. If you do not select a search definition for the field, then the default search definition is used. You associate criteria definitions with adapter sections.
Adapter	The adapter specifies the BO search definitions and quick create definitions that are enabled for a particular component or transaction. The adapter also defines the fields that appear in basic search mode, the search criteria to invoke for these fields, and the subpages of the component upon which these fields appear. Adapter sections are embedded into CRM applications.

BO Search Runtime Processes

PeopleSoft Customer Relationship Management (PeopleSoft CRM) provides the capability for users to search for business objects that they need to reference on transactions or components. When users don't know the exact name of the business object to reference, they can initiate a BO search to find the business object based on any information that they might know. The system determines the information that it requires to locate the BO and presents a search page for the user to enter known information.

The customer identification framework also uses BO search technology without the user having to explicitly initiate a search.

When a user searches for an object that does not already exist in the system, some PeopleSoft CRM transactions provide quick create functionality that enables the user to create that object with a minimum set of data. For example, when a contact calls for service on behalf of a company, the customer service representative (CSR) verifies the contact's information by doing a BO search for the contact. If the contact is not found in the database, the CSR can create a contact immediately and associate it to the company.

BO search and quick create functions are tightly integrated with each other, and they use much of the same system data.

See Also

Chapter 14, "Using Business Object Search and Quick Create Functionality," Understanding the Business Object Search and Quick Create Process, page 303

Chapter 14, "Using Business Object Search and Quick Create Functionality," Identifying Customers for Transactions, page 306

BO Search and Quick Create Setup

This is the BO search and quick create setup process:

1. Define search fields.
2. Define quick create templates.
3. Enter a quick create definition.
4. Define search roles.
5. Enter a search definition.
6. Define search criteria.
7. Define the BO search and quick create adapter.

Note. Setting up BO search and quick create definitions requires a good understanding of roles and relationships in the system.

See Also

Chapter 2, "Understanding Business Object Relationship Model Components," Business Object Relationship Modelling, page 7

Delivered Definitions

PeopleSoft CRM delivers a robust set of predefined system data that meets most business requirements. Search the delivered definitions before attempting to modify or add new business object search or quick create definitions. To search the delivered definitions, access the setup component for that definition and run a search without entering search criteria. A list of all defined items appears.

Important! PeopleSoft does not support changes that you make to the search definitions delivered with PeopleSoft CRM. Implementation of any new search definitions that you create requires a coding effort, which is also not supported by PeopleSoft.

See Also

Chapter 13, "Working with Predefined Business Object Search and Quick Create Data," page 223

Adding and Modifying BO Search and Quick Create Definitions

This section discusses how to:

- Define fields.
- Define roles for a field.
- Define quick create templates.
- Define relationships for a template.
- Set up quick create definitions.
- Associate search fields with a role type.
- Define BO searches.
- Define search criteria fields.
- Specify basic search criteria fields.
- Define fields for transaction subpages.

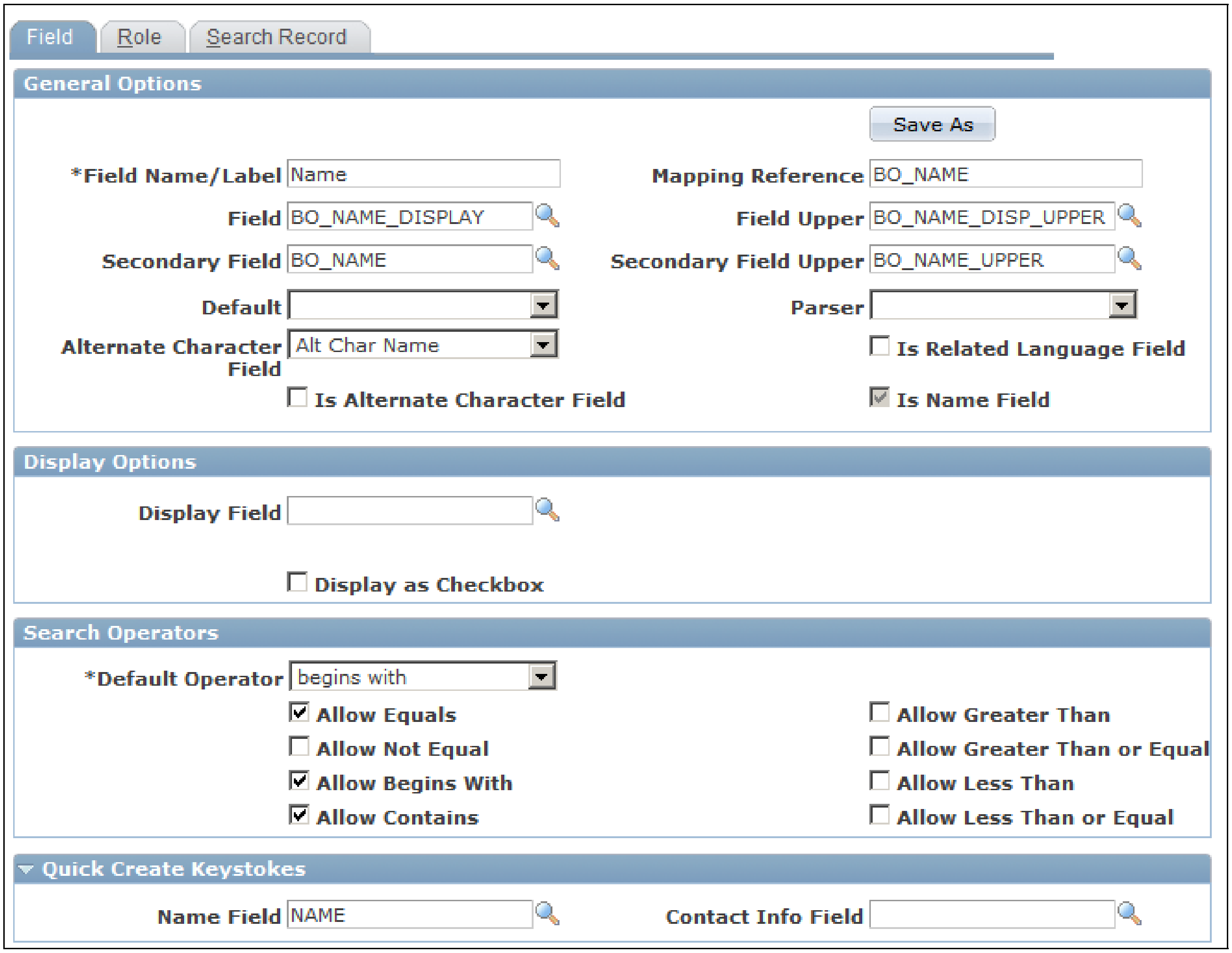
Pages Used to Add or Modify Search Definitions

Page Name	***Definition Name***	***Navigation***	***Usage***
Field	RBQ_FLDDFN	Set Up CRM, Common Definitions, Customer, BO Search, Field, Field	Define a field that is used in BO Search and quick create definitions.
Role	RBQ_FLDDFN_RL	Set Up CRM, Common Definitions, Customer, BO Search, Field, Role	View the roles that use the field definition. Each role that uses the field definition can override certain information that is defined for the field.
Search Record	RBQ_FLDDFN_REC	Set Up CRM, Common Definitions, Customer, BO Search, Field, Search Record	Specify characteristics of the record that is searched.
Template	RBQ_QCTMPL	Set Up CRM, Common Definitions, Customer, BO Search, Quick Create Template, Template	Define a quick create template. This defines the business object roles that appear on the Quick Create page when quick create is initiated from a specific component.

Page Name	***Definition Name***	***Navigation***	***Usage***
Relationships	RBQ_QCTMPL_REL	Set Up CRM, Common Definitions, Customer, BO Search, Quick Create Template, Relationships	Define the relationships between the roles defined on the quick create template.
Quick Create	RBQ_QCDFN	Set Up CRM, Common Definitions, Customer, BO Search, Quick Create, Quick Create	Set up a quick create definition and associate one or more quick create templates to it.
Search Role	RBQ_SRCHRL	Set Up CRM, Common Definitions, Customer, BO Search, Search Role, Search Role	Associate search fields with a role type.
Search	RBQ_SRCHDFN	Set Up CRM, Common Definitions, Customer, BO Search, Search, Search	Define a BO search with one or more search roles, search fields, and related BOs.
Criteria	RBQ_CRITDFN	Set Up CRM, Common Definitions, Customer, BO Search, Criteria, Criteria	Specify the advanced search criteria fields and advanced search definition.
Adapter	RBQ_ADPTR	Set Up CRM, Common Definitions, Customer, BO Search, Adapter, Adapter	Specify the basic search criteria fields.
Sections	RBQ_ADPTR_SECT	Set Up CRM, Common Definitions, Customer, BO Search, Adapter, Sections	Define the records and fields that appear on transaction subpages.
Labels	RBQ_ADPTR_LBL	Set Up CRM, Common Definitions, Customer, BO Search, Adapter, Labels	Define labels.

Defining Fields

Access the Field page (Set Up CRM, Common Definitions, Customer, BO Search, Field, Field).



Field page

The purpose of a field definition is to ensure that the same value in propagated across different BO search and Quick Create definitions. If the field is constrained by role type, the value is propagated across only the definitions for this role type. For example, the value that is entered on a transaction is propagated to the search criteria then to the Quick Create template. Field definitions are referenced either directly or indirectly in all BO Search and Quick Create definitions.

A field definition specifies:

- The location of the field in the database.
- How the system searches for the field.
- The label of the field on the user interface.
- How Quick Create updates the field.

General Options

The system uses the values you enter in this region to format the BO search and Quick Create pages for the field, to process values that are entered for the field, and to compare entries against the database for duplicates.

Field Name/Label	Enter text that appears for the field on the user interface. The text appears both as a search criteria value that the user can select and as a column in the list of results returned by the search.
Mapping Reference	Enter the name that is used by the adapter to refer to the field in the component buffer.
Field and **Secondary Field**	Enter the names of the fields that the system searches for values that the user enters at runtime. The system searches the secondary field only if it doesn't find a match in the first field entered.
Field Upper and **Secondary Field Upper**	For fields of data type String, enter the names of the upper case fields that corresponds to the Field and Secondary field. This significantly improves performance when not using a case sensitive search.
Default	Select *Country*,*Currency*,*Language Code*or *SETID.* If selected, the corresponding value that is specified in the preferences for the user is inserted into the record at runtime by default.
Parser	Select the method to use to convert data that is entered in the field. For example, *Unformatted* converts (925) 694-44249 into 9256944249.
Alternate Char Field	Select the alternate character field that is appears when the user ID is enabled for alternate character. See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Implementing Alternate Character."
Is Related Language Field	Select to force translation of the field values to the user's language if the user is logged on with a language other than the base language.
Is Alternate Character Field	Select to indicate that the field is alternate character-enabled.
Is Name Field	Appears for the Name field definition only and is selected by default. You cannot deselect this option, nor can you add it to other field definitions. The Name field identifies the business object. The Is Name Field indicator facilitates processing by keeping the business object name in memory.

Display Options

The entries in this page region control how the field appears on pages at runtime.

Display Field	Enter the name of the field that is used to display the values at runtime.
Display as Checkbox	Indicate that this field appears as a check box for display and entry. The *Y* and *N* values in the field are translated at runtime into the appropriate check box property (selected or not selected).

Search Operators

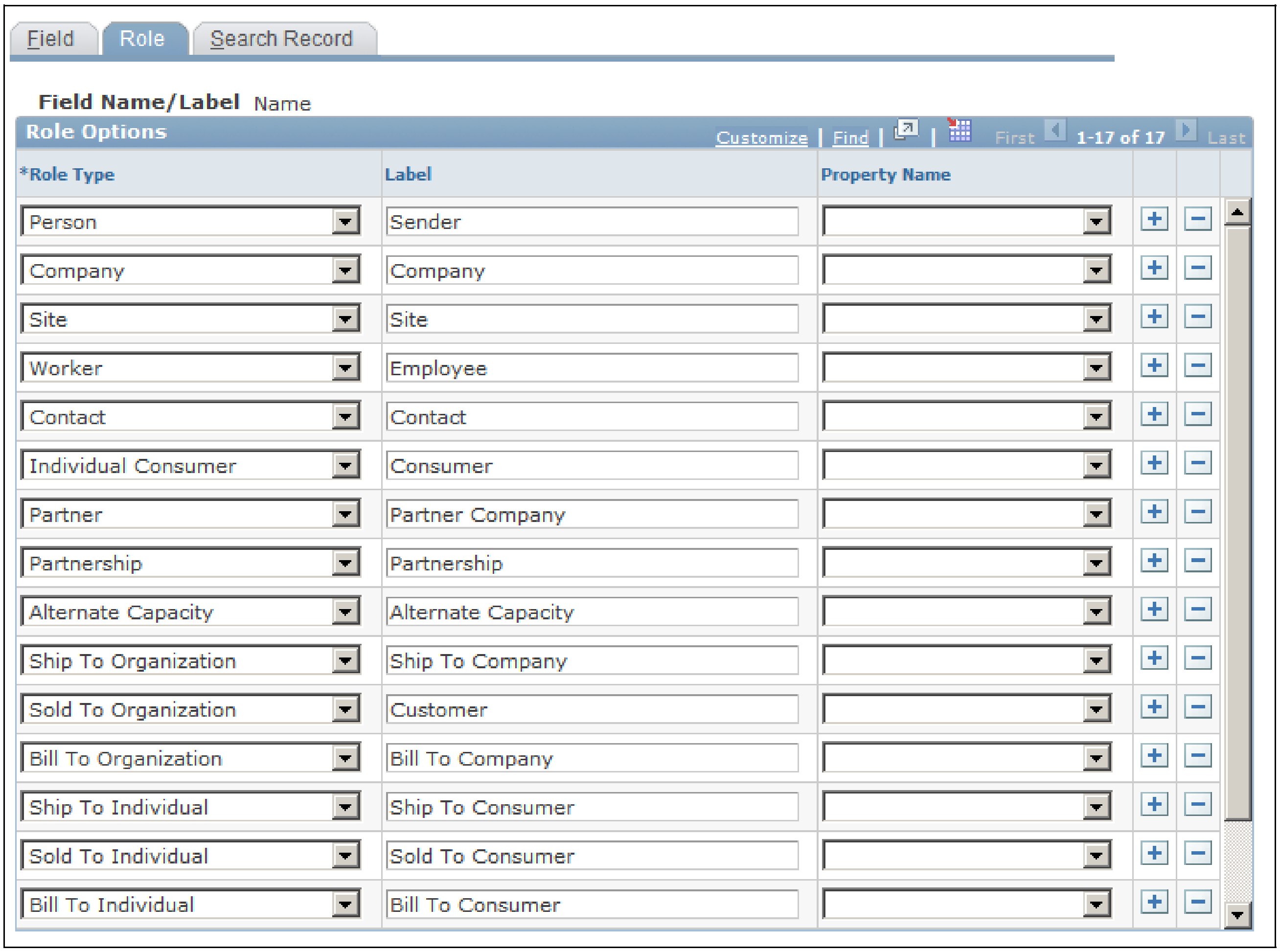
Select the default search operator and the search operators that are visible to the user when this field is searched.

Quick Create Keystrokes

Select the quick create field name(s) to which the field maps. If the field is entered as search criteria, and the search is unsuccessful, then system pre-populates the quick create field with the value that was entered as a search field.

Viewing Roles that Use a Search Field

Access the Role page (Set Up CRM, Common Definitions, Customer, BO Search, Field, Role).



Role page

Use this page to indicate different role options for search fields. If the field is used by different role types, you can specify a different label to appear next to the field for each different role type. You can also specify a different property that is set for each role. The specifications you make on this page override the ones that you made on the Field page.

Role Type

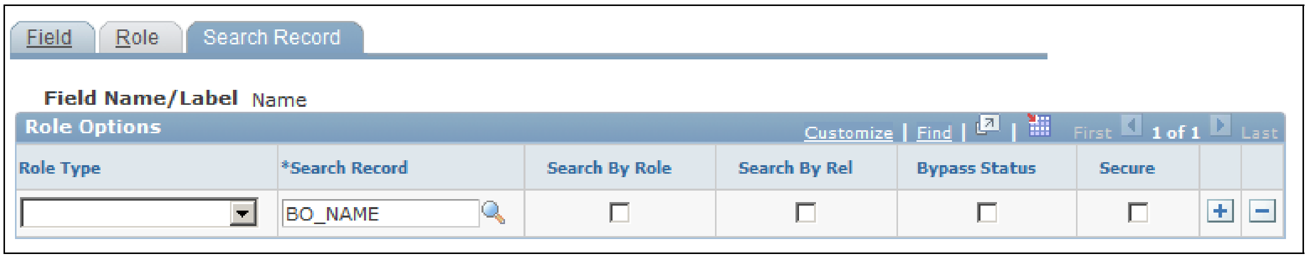
Select a role type that is valid for this field. The system uses the role type to identify objects for which the field can be used as search criteria.

Property Name

Select a property name for this role. Quick create updates the property with the value that users enter in the corresponding field when they create a new business object using quick create functionality.

Specifying Search Records

Access the Search Record page (Set Up CRM, Common Definitions, Customer, BO Search, Field, Search Record).



Search Record page

This page enables you to define how searches for role-specific fields are performed.

Role Type

Enter the role type to which the search options apply. If no role type is entered, the options on this line apply to all role types.

Search Record

Enter the name of the database record where BO Search looks for the field to display.

Search By Role

Select search only views that contain both the BO_ID (business object identifier) and ROLE_TYPE_ID (role type identifier) fields.

Search By Rel(Search By Relationship)

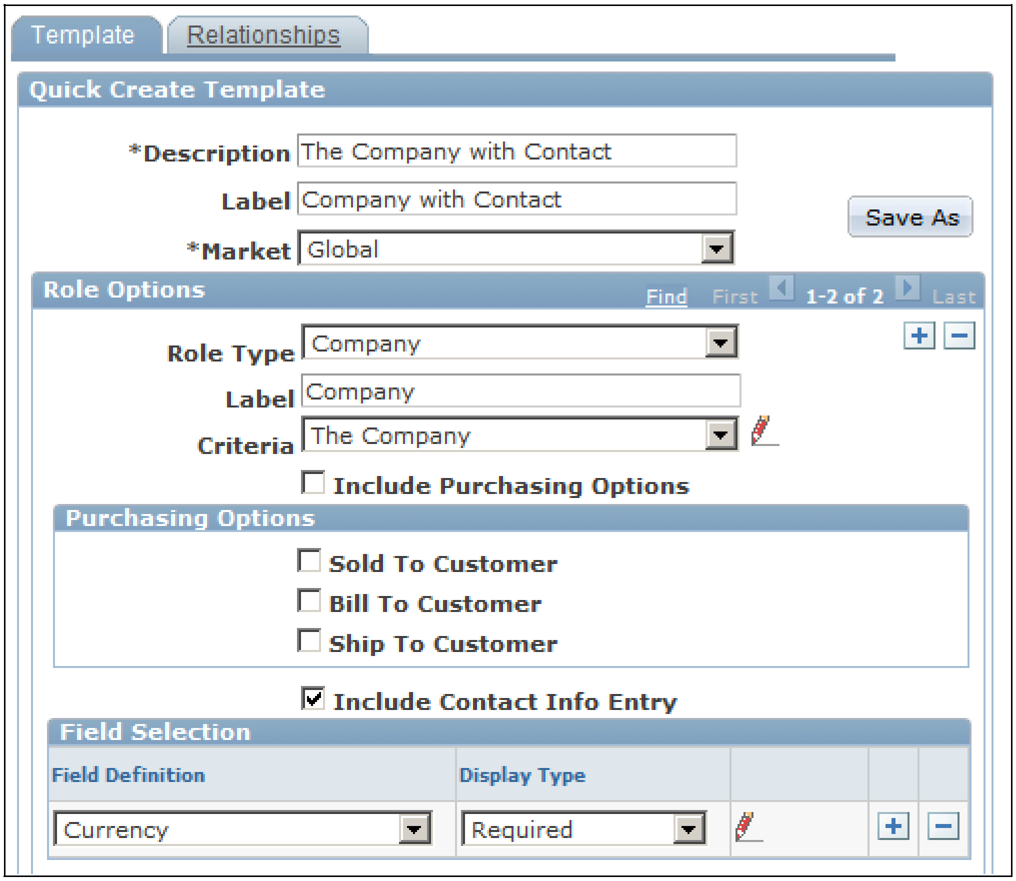
Select to search only views that contain both a BO_ID_1 and BO_ID_2 field.

Bypass Status

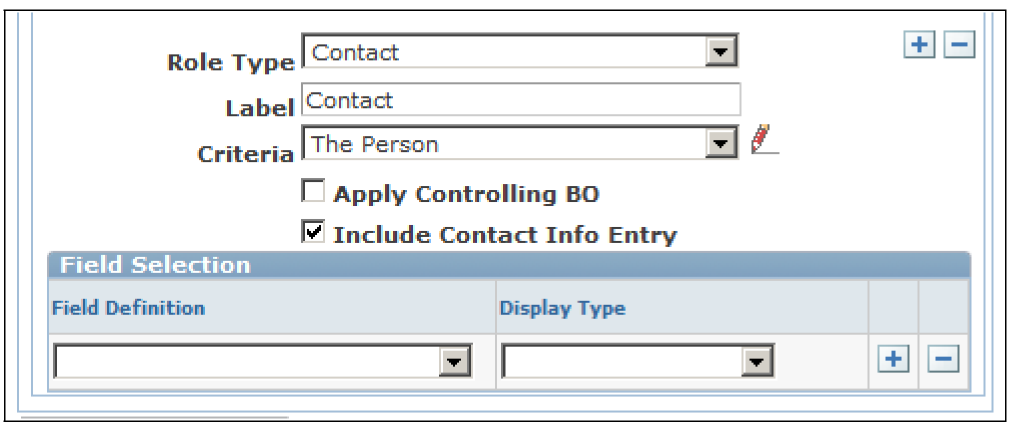
Select to search all values of the contact information. If this check box is not selected, only the current values for all fields in the contact record are searched.

Defining Quick Create Templates

Access the Template page (Set Up CRM, Common Definitions, Customer, BO Search, Quick Create Template, Template).



Template page (1 of 2)



Template page (2 of 2)

Quick Create templates associates the fields that are entered on Quick Create pages with the role and relationship types that are updated in the database when the user creates a new business object.

Market Select the market for which this template is enabled.

Role Type Select the role type for which you want to enable this quick create template.

Label

Enter the label that appears for this role type on the quick create page.

Criteria

Select the criteria definition that is invoked when searching for existing business objects from the Quick Create page. In the example page shot, when the user quick creates a *Company with Contact,* the *The Company* search definition is invoked to ensure that the company being created does not already exist.

Include Contact Info Entry

Select to include contact information for entry on the Quick Create page.

Include Purchasing Options

Select to have the purchasing options appear on the Quick Create page.

Mapping Reference

Enter the name that is used by the adapter to refer to the field in the component buffer.

Apply Controlling BO

Select to have the system search for existing values of the role type only within logically related values for the parent business object. For example, if a company has multiple contacts, the system searches for contacts of the company only, regardless of whether other contacts with the search criteria exist.

Field Selection

Select one or more field definitions to include on the quick create template.

See Also

Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Contact Information for Business Objects, page 58

Chapter 5, "Defining Purchasing Options for Companies, Consumers, and Sites," page 77

Defining Relationship Details for the Template

Access the Relationships page (Set Up CRM, Common Definitions, Customer, BO Search, Quick Create Template, Relationships).

Relationships page

Note. Defining template relationships is optional. Define relationships between roles only if you include more than one role on a template.

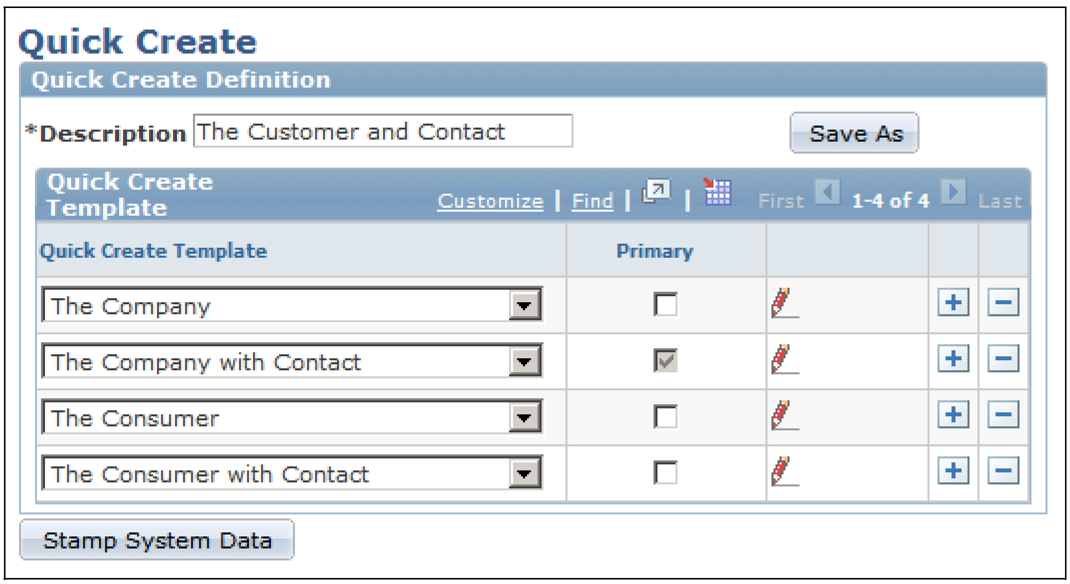
Role and Relationship Selection

This page region enables you to specify the relationships that are built between the roles that are defined on a quick create template.

Role Type 1 and **Role Type 2**	Select the role types that are defined on the template.
Relationship Type	Select the relationship type between the two selected roles.

Setting Up Quick Create Definitions

Access the Quick Create page (Set Up CRM, Common Definitions, Customer, BO Search, Quick Create, Quick Create).

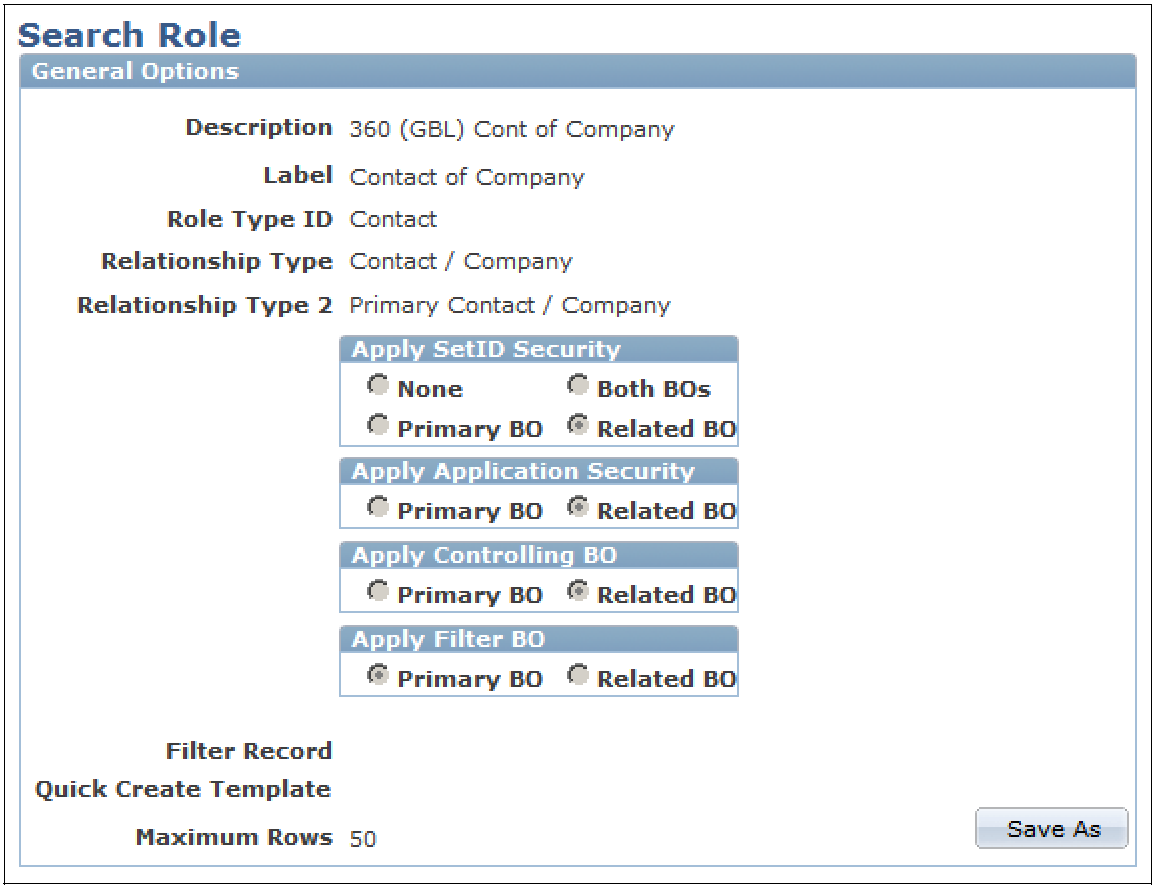


Quick Create page

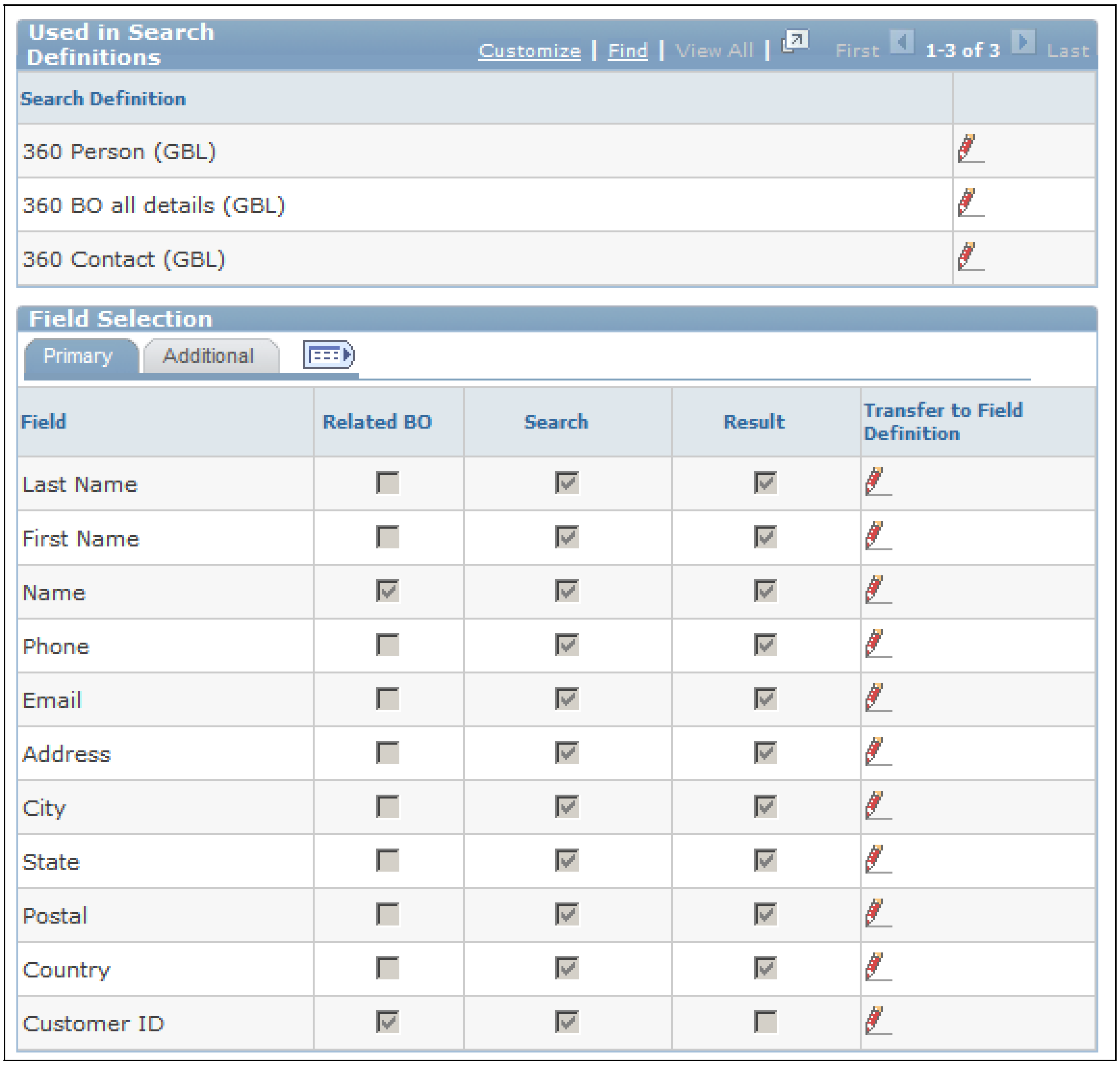
Quick Create Template	Select one or more templates to associate with the definition.
Primary	Select to indicate that the template is the primary, or controlling, template used by the quick create definitions. Primary templates appear first on the runtime Quick Create page.

Associating Search Fields with a Role Type

Access the Search Role page (Set Up CRM, Common Definitions, Customer, BO Search, Search Role, Search Role).



Search Role page (1 of 2)



Used in Search Definitions Customize | Find | View All | First 1-3 of 3 Last

Search Definition	
360 Person (GBL)	
360 BO all details (GBL)	
360 Contact (GBL)	

Field Selection

Primary | Additional

Field	Related BO	Search	Result	Transfer to Field Definition
Last Name	☐	☑	☑	
First Name	☐	☑	☑	
Name	☑	☑	☑	
Phone	☐	☑	☑	
Email	☐	☑	☑	
Address	☐	☑	☑	
City	☐	☑	☑	
State	☐	☑	☑	
Postal	☐	☑	☑	
Country	☐	☑	☑	
Customer ID	☑	☑	☐	

Search Role page (2 of 2)

A search role definition associates field definitions to one or more role types. When the user searches for a field, only business objects with a role that is associated with the search role definition are returned in the search results. Each search role definition is associated with a SQL engine and generates a single driver SQL statement and multiple list field SQL statements.

Search role definitions also specify how the search is conducted: security options, relationships to search, how the results are filtered, and the quick create template that is used to create new objects for the role.

General Options

Enter information that describes the role and how it appears.

Relationship Type and **Relationship Type 2**	Select a relationship type. All relationship types that apply to the role appear in these drop down lists. The one that you select is used to filter the search results.

Apply SetID Security	Select the options that determine how setID security is applied. If you do not specify a relationship for the role, this field is a check box that you either select or not. If you specify a relationship for the role, you have the options to apply SetID security to the primary, related, both, or neither business object in the relationship. See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up Security and User Preferences."
Apply Application Security, Apply Controlling BO, and **Apply Filter BO**	Select the options that determine whether application security, controlling BO, and filter BO are applied to the primary or related business object in the relationship. If you do not specify a relationship, these options are not available.
Filter Record	Enter the name of a record that is used to filter the search results.
Quick Create Template	Enter the name of the quick create template that in used to enter a new object in the event of an unsuccessful search, or that is invoked directly from the BO Search by clicking the pencil icon.

Used in Search Definitions

A list of all search definitions that use the role appears here.

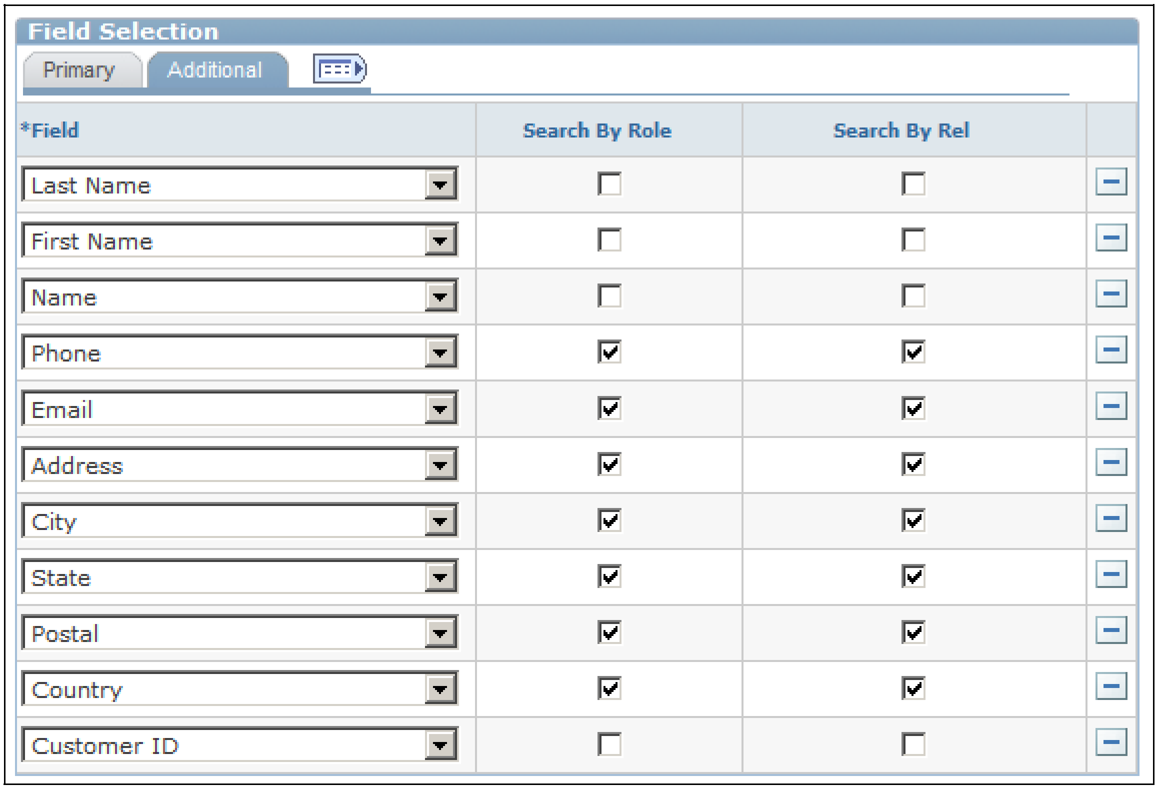
Field Selection

Add fields that the role can search.

Related BO	Select if the field is a field of a related BO. For example, for the Contact search role, you can check the Company Name field as a related BO because the field belongs to the company record and not the contact record.
Search	Select to use this field as a search criterion.
Result	Select for this field to appear in the search results.

Additional Search Role Options

Access the Field Selection - Additional page.

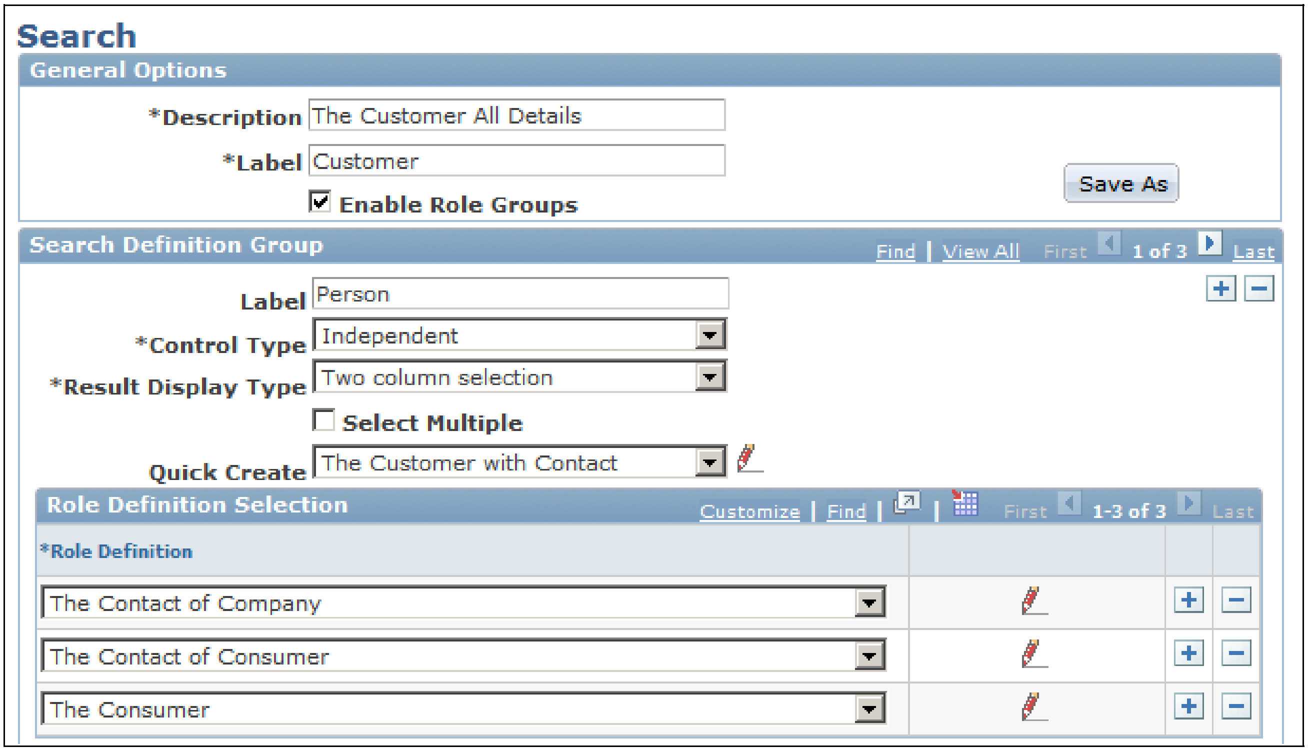


Field Selection - Additional page

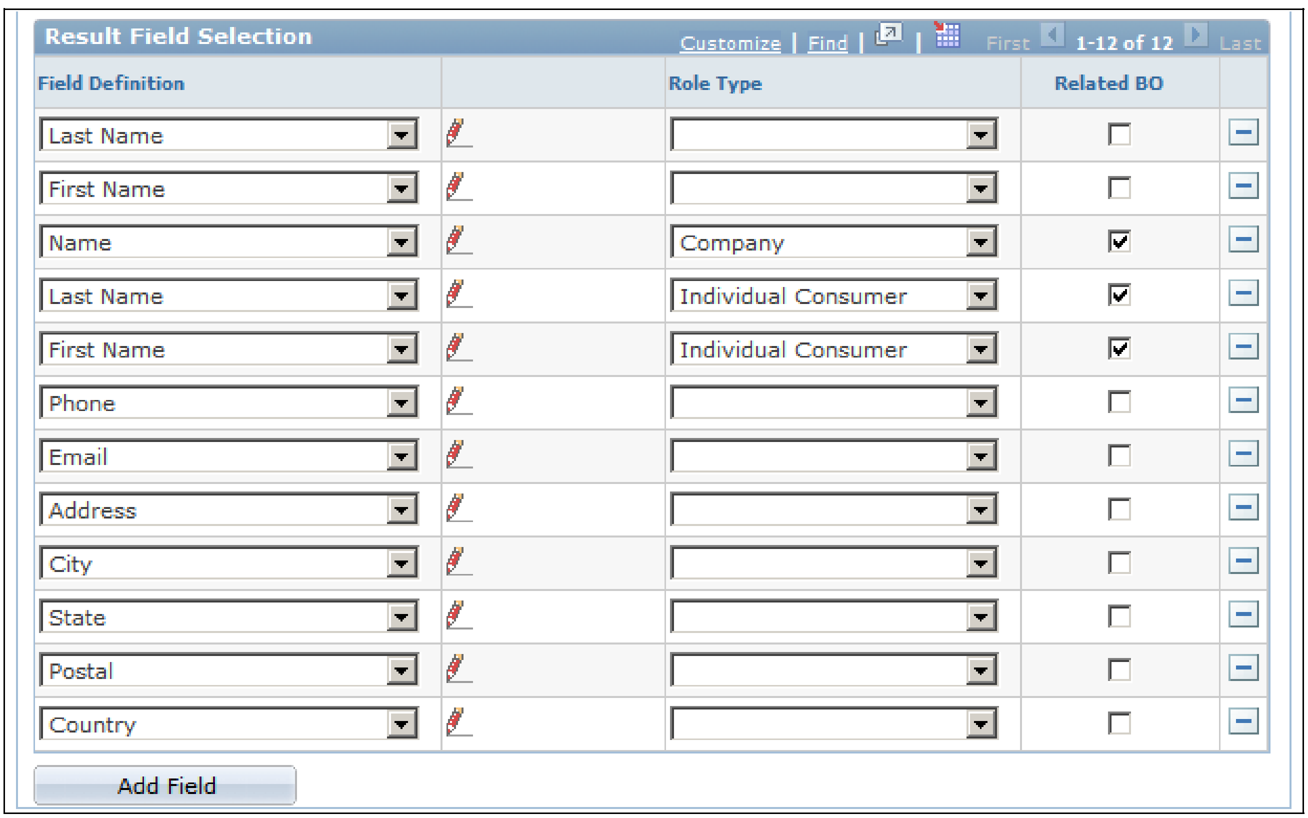
Use this page to override search views defined on the Field Definition - Role page.

Defining BO Searches

Access the Search page (Set Up CRM, Common Definitions, Customer, BO Search, Search, Search).



Search page (1 of 2)



Search page (2 of 2)

Enable Role Groups

Select to group the search results by role. For example, the Company, Site, and Alternate Capacity roles are grouped in the Organization group and the Consumer, Contact of Company, Contact of Consumer, Worker roles are grouped in the Individual group.

Note. The appearance of this page changes when you select this check box. Two additional page regions, Search Definition Group and Field Selection appear.

Search Definition Group

Control Type

Indicate if the role group is *Controlling,Independent*, or *Dependent.*

Results appear with the controlling role first, followed by all dependent group records that are associated with the controlling group. For example, this enables users to display organizations first, then all the individuals that are associated with the organization. You can only have one*Controlling* group.

Result Display Type

Indicate whether the results appear in one column or two column format.

Select Multiple

Select to enable the user to choose multiple records from the result set.

Quick Create

Select the quick create definition to associate with the role.

Role Definition

Select one or more roles for the search definition, define their appearance in results, and associate them with quick create definitions.

Role Definition

Select one or more search roles to associate with the search definition.

Result Field Selection

This page region appears when you select Enable Role Groups. If you associate more than one role definition to a search, then you must enter field definitions. This is necessary because two or more roles can use the same field definition. You must indicate to which role the field pertains.

Field Definition

Select the name of the field definition.

Role Type

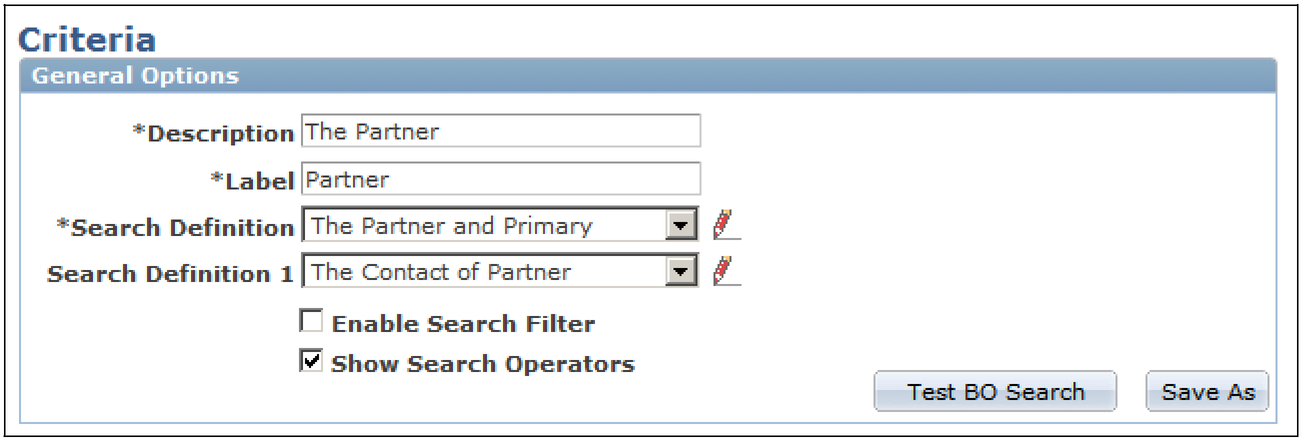
Select the role type to associate with the field definition. When the system displays results of the BO search, if role groups are enabled, the field appears only in the role group for the role type with which it is associated.

Related BO

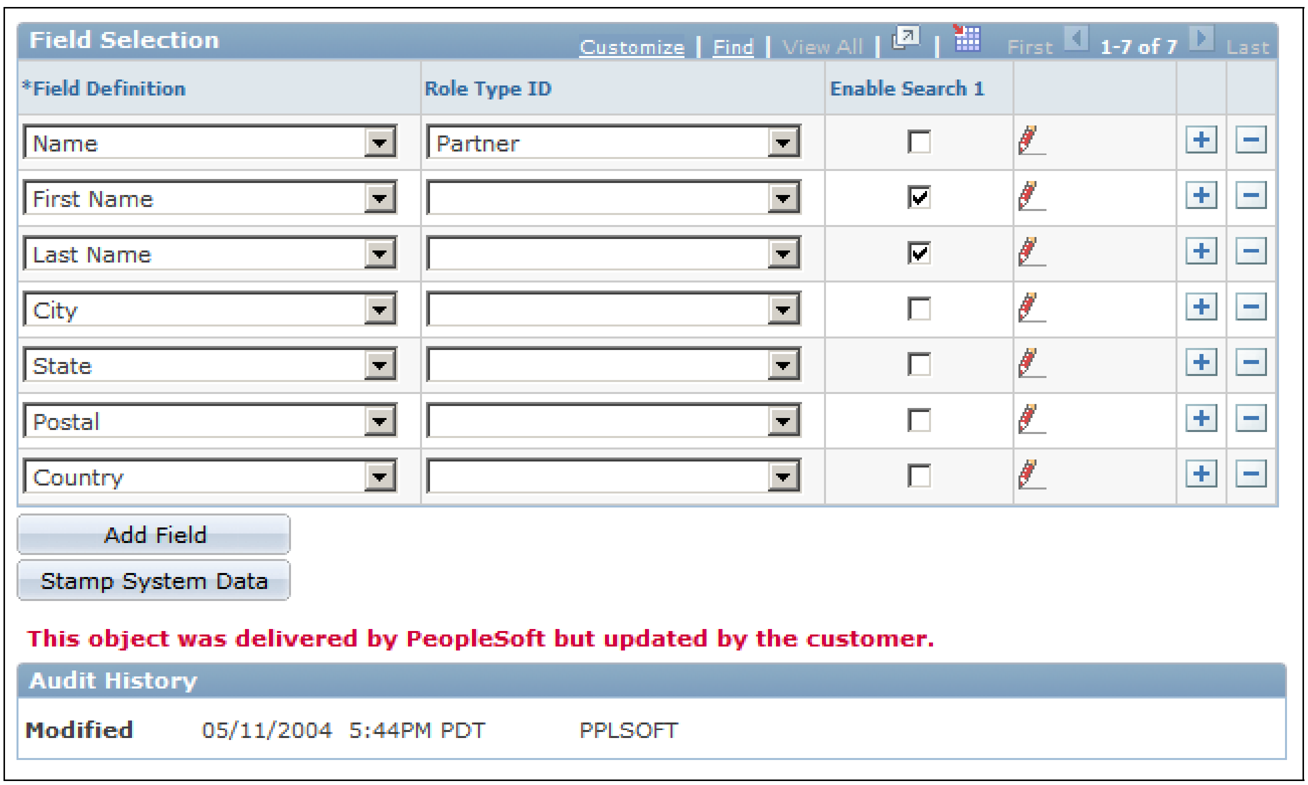
Select to indicate that the field in defined on a related BO, not the primary BO that is the target of the search definition.

Defining Search Criteria Fields

Access the Criteria page (Set Up CRM, Common Definitions, Customer, BO Search, Criteria, Criteria).



Criteria page (1 of 2)



Criteria page (2 of 2)

This page captures information about the search definitions to invoke when the user enters certain fields.

Description	Enter the name for the group of criteria that you specify. This name is used to link the criteria to an adapter section.

Search Definition	Enter the default search definition. The definition is used by default when the user searches for a field
Search Definition 1,Search Definition 2,Search Definition 3,Search Definition 4 and **Search Definition 5**	Enter alternate search definitions. These search definitions appear at runtime. The user can search by the default definition or select an alternate.
Enable Search Filter	Select to have only the search fields that are associated with the selected search definition appear at runtime.
Show Search Operators	Select to have the search operators appear on the BO Search page at runtime.

Field Selection

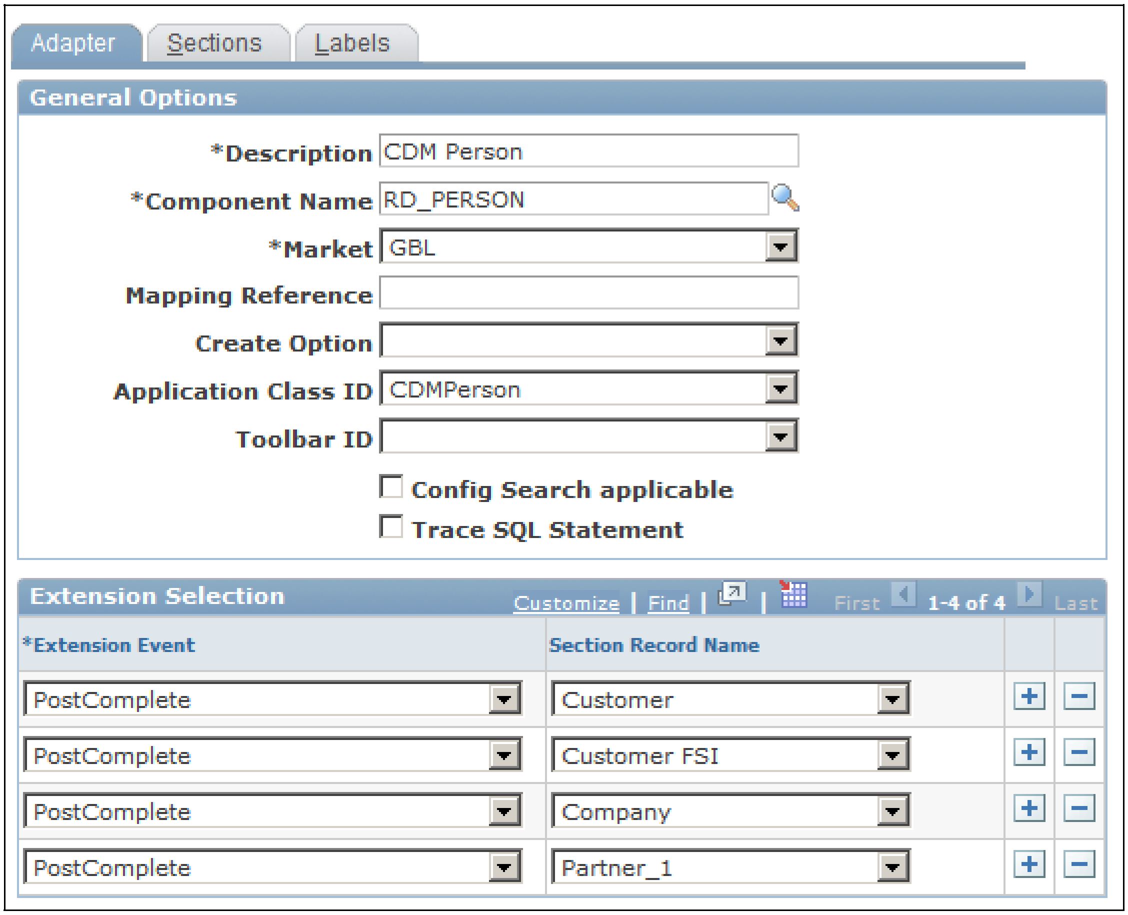
Use this page region to select fields for a search criteria definition, specify the roles for which the field appears, and select the search definitions for which the field is enabled.

Role Type ID	Select the role to which the field applies, in the case where a field is shared by different roles. For example, if the Name field is shared between the Company and Site roles. To have it appear once as *Company Name* and once as *Site Name,* you need to select the Name field twice and associate one to the Company role and one to the Site role.
Enable Search 1,Enable Search 2,Enable Search 3, Enable Search 4 and **Enable Search 5**	Select to enable the corresponding search definition for the field. For example, if you enable Search 1 and Search 3 for a field, then these search definitions appear in a drop down list at runtime. The user can select a search definition or search by the default definition.

Note. If you select a field for multiple roles, at runtime the field appears once in the search criteria for each role selected. You can specify different field labels for each role to differentiate between multiple occurrences.

Specifying Basic Search Criteria Fields

Access the Adapter page (Set Up CRM, Common Definitions, Customer, BO Search, Adapter, Adapter).



Adapter page

Component Name
Specify the component to which this adapter definition pertains.

Market
Select the market to which this adapter definition pertains.

Mapping Reference
Enter a reference that is used to switch adapters if more than one adapter is needed for a component. This might occur if the same field is used by more than one role.

Create Option
The Create Option is used to hold an authorization code that determines which users can use quick create.

Application Class ID
Select the application class where subpages defined by the adapter are defined.

Toolbar ID
Select the name of the component toolbar where the names of the business objects that are retrieved by BO Search appear. A component toolbar is used to display common information across all pages in the component.

Config Search Applicable (configurable search applicable)
Select to enable configurable search pages for the component to invoke this search definition.

Trace SQL Statement Select to have the system write the SQL statements that are executed by the search at runtime to a trace log.

Extension Selection

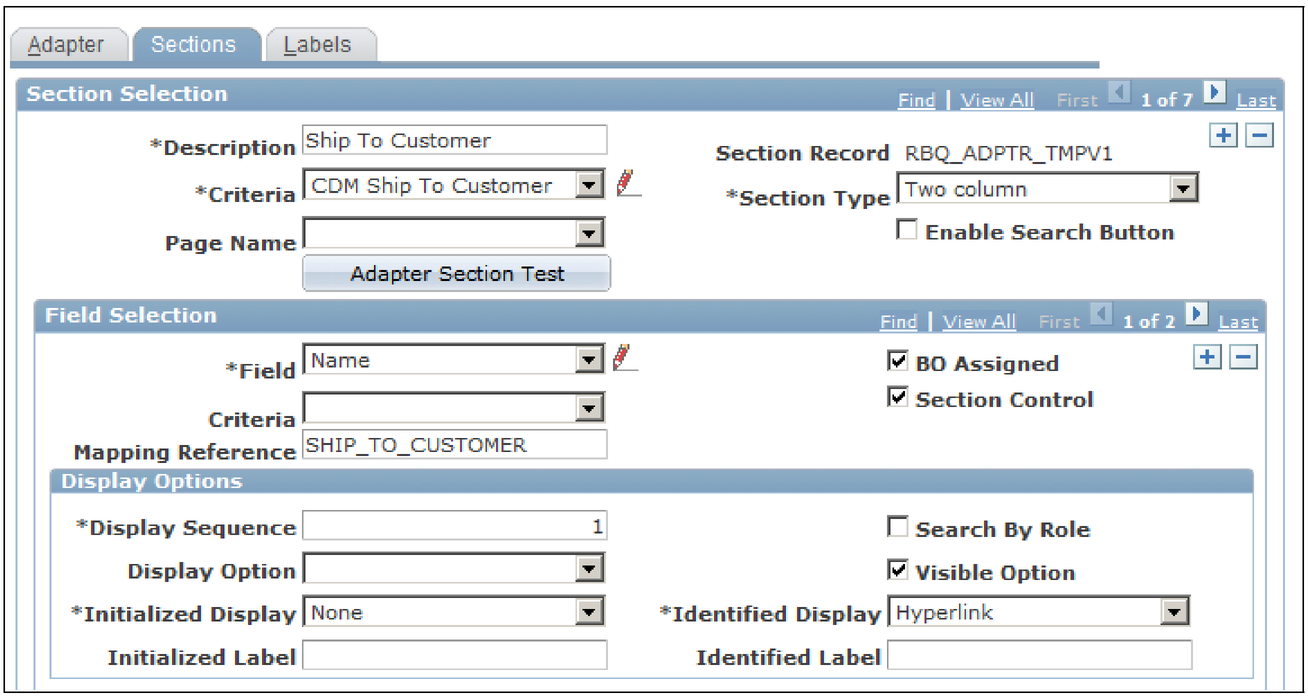
Extension Event Select a method from the list that appears.

This list contains the methods of the selected application class. You can use these to write custom code.

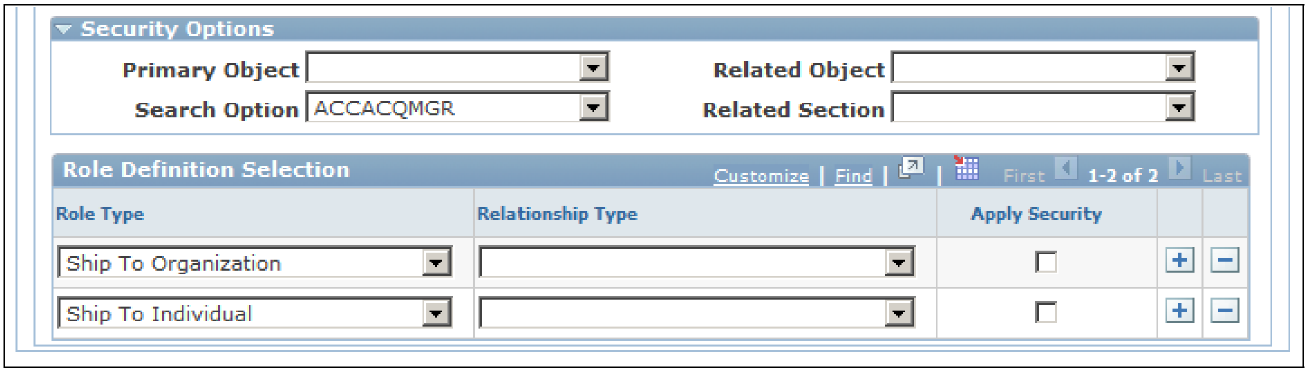
Section Record Name Enter the section to which this extension applies. The list of available sections is taken from the sections that you defined on the Sections page.

Defining Fields for Transaction Subpages

Access the Sections page (Set Up CRM, Common Definitions, Customer, BO Search, Adapter, Sections).



Sections page (1 of 2)



Sections page (2 of 2)

Note. Before you configure the transaction adapter for fields, make sure that you have an extensive understanding of system data and transactions.

Section Record
The name of the record that is used as the subpage on the transaction.

Criteria
Select the criteria definition that is used by this section.

Section Type
Select from *One Column,Two Column,Hidden*, or *Custom.* If you need to identify a customer in a grid, then specify *Custom.Custom* sections are used in configurable search pages; other section types are used for customer identification on component and transaction pages.

Page Name
Select the page name that can contain this adapter section. This provides the flexibility to define sections with differing section options, for example, security, in the same adapter.

Enable Search Button
Select to have a Search button appear on the sub page at runtime.

Field Selection

Field
Enter the name of the field to appear on the transaction.

BO Assigned
Select to indicate that this field is associated to a primary BO on this section.

Section Control
Select to have the field label as defined for this section take precedence over label definitions for the same field as defined for any other section or role. This ensures consistency of the user interface.

Criteria
Select to use a value that is identified for the field as a criteria for additional searches.

For example, when a company is identified at runtime, a prompt button with a search for contact appears. When the user clicks the prompt, the system invokes the search definition that is entered in this field.

Mapping Reference Enter the logical name of the field on the transaction's component buffer.

Display Options

The entries in this page region control how the section appears to the user at runtime. Different fields appear depending on the Section Type you select.

Search by Role Select to have the search results displayed by role.

Required Flag Select to require that the user enter search criteria in the section's fields. This field appears only if you select aSection Type of *Custom.*

The following fields appear only if the Section Type is not *Custom.*

Display Option Select the functional option that controls security on this field. This is used in conjunction with display templates.

Initialized Display Select how the field appears when the user first accesses the component. The options in this list control if the field is enterable and if the user can look up field values. For example, the Company Name field on the Case component is enterable but not required.

Identified Display Select how the field appears when a value is found for the field. For example, if the company name is found, the name appears as a link to the Company component.

Initialized Label Enter the text for the field label when the user first accesses the component. For example, *Enter a Company Name.*

Identified Label Enter the text of the field label that appears when the user first accesses the component. For example, *Company Name.*

Security Options

The fields in this page region are used to define security for Partner Relationship Management. To complete the security setup, you must have a relationship established between the two business objects.

Primary Object Enter the object that is used as a prompt table for the section. For example, to validate field entries on Partner objects, select the *Partner* value.

Related Object Enter the object that is related to the primary object. For example, when building a partner-customer relationship, the related object is *Customer.*

Related Section Enter the adapter section name that is used to identify the value in the Related Object field.

Search Option

Select the option that determines whether to restrict all or selected users from viewing search results or secured search result. If you leave this field blank, then all users will be able to view only the related search results, for example, only the partners that are associated with a selected customer. If this field is populated, then users whose code matches the search option will be able to view all results (not restricted).

Role Definition Selection

Select the role and relationship to be secured for the section and check the Apply Security check box. If no security is required then leave the check box empty. If both Customer and Partner fields require restricted views, then the check box must be selected on both sections.

This page region works in conjunction with the Security Options region, in this way:

The primary and related search objects define the relationship between the two adapter sections and the search options define the authorization code that determines which users are restricted. The Apply Security check box determines to which roles and relationships of the two objects security is applied.

Defining Labels

Access the Labels page (Set Up CRM, Common Definitions, Customer, BO Search, Adapter, Labels).

Labels page

Use this page to specify the labels that appear on BO search and quick create pages that are initiated from a transaction subpage. This ensures consistency between labels for fields on customer identification subpages, advanced BO Search pages, and Quick Create pages.

Role Type

Select the role type to which this label applies. If not selected, the label override applies to all roles.

Chapter 16

Defining Ad Hoc Business Objects

This chapter provides an overview of ad hoc business objects and discusses how to define ad hoc business objects.

Understanding Ad Hoc Business Objects

The business object types that the PeopleSoft system delivers are sufficient to process all transactions in the delivered PeopleSoft Customer Relationship Management (PeopleSoft CRM) system. To meet additional business requirements, you can define ad hoc business objects. You define and manage ad hoc business objects in the Business Object component.

Before you can add an ad hoc business object to the system, you must define control values for the object. Ad hoc business objects use the same controls as delivered business objects: business object types, name types, role types, and relationship types.

Note. You use the same pages to define and maintain control information for ad hoc business object that you use to maintain controls for business object types, such as company, site, and person, that are delivered with PeopleSoft CRM.

You can also use the relationship viewer in the Business Object component to maintain names, roles, and relationships for the business objects that you maintain in CRM components (Company, Site, and Person). For example, to add the broker role to a contact, you would search for the contact by name and access the Relationship Viewer page. To create these roles and relationships, you must first set up the appropriate control values and configure a relationship view to recognize this type of relationship.

See Also

Chapter 2, "Understanding Business Object Relationship Model Components," page 7

Chapter 3, "Defining Control Values for Business Objects," page 15

Defining Ad Hoc Business Objects

To define ad hoc business objects, use the Business Object (BO) component.

This section discusses how to:

- Maintain name information.

- View and maintain ad hoc business object relationships.

See Also

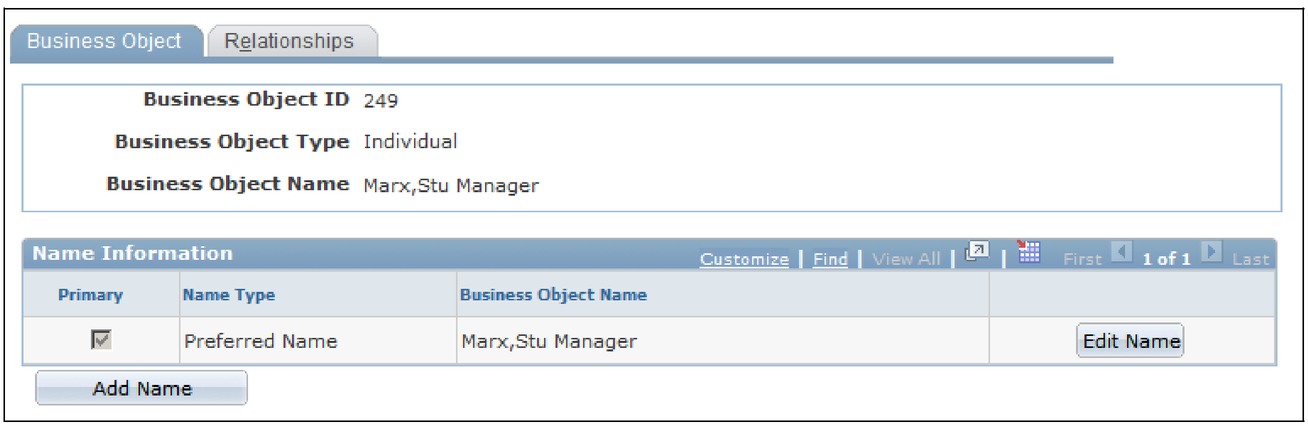
Chapter 8, "Working with the Relationship Viewer," page 121

Pages Used to Define Ad Hoc Business Objects

Page Name	***Definition Name***	***Navigation***	***Usage***
Business Object - Business Object	BO	Customers CRM, Business Object, Business Object	Maintain name information for ad hoc business objects.
Business Object - Relationships	BO_REL	Customers CRM, Business Object, Relationships	View and maintain ad hoc business object relationships.

Maintaining Name Information

Access the Business Object - Business Object page (Customers CRM, Business Object, Business Object).



Business Object - Business Object page

Name Type Displays the business object type.

See and Chapter 3, "Defining Control Values for Business Objects," Defining Business Object and Name Types, page 25.

Viewing and Maintaining Ad Hoc Business Object Relationships

Access the Business Object - Relationships page (Customers CRM, Business Object, Relationships).

See and Chapter 8, "Working with the Relationship Viewer," page 121.

Part 6

Customer and Worker Data Integrations

Chapter 17

Managing Enterprise Integration for PeopleSoft CRM

This chapter provides overviews of enterprise integration technology, integration with PeopleSoft HCM, PeopleSoft Campus Solutions or third-party HR data and data integrations. It also discusses how to:

- Set up defaults for integrating customer and contact information.
- Market-enable Company, Consumer, Site, and Contact enterprise integration points (EIPs).
- Establish master ID databases.
- Map message data to PeopleSoft CRM records and fields.

Understanding Enterprise Integration Technology

This section discusses:

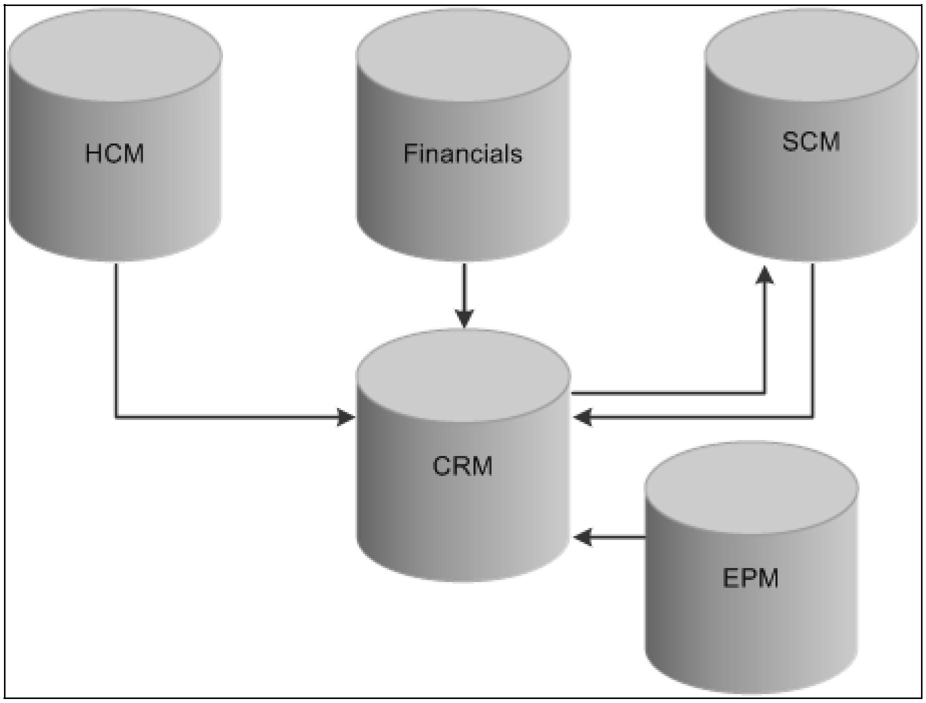
- EIPs in PeopleSoft CRM.
- PeopleSoft CRM foundation EIPs.
- Application messages.
- Data mapping for application messages.

EIPs in PeopleSoft CRM

PeopleSoft CRM applications collaborate to manage and share data across your enterprise—from managing customers and workers to tracking inventory. They use EIPs primarily to integrate with:

- PeopleSoft applications outside of CRM.
- Third-party applications.

This diagram illustrates how PeopleSoft CRM works with other PeopleSoft applications to manage and share data across your enterprise:



Integration between PeopleSoft databases

PeopleSoft CRM integrates with:

- PeopleSoft HCM, which publishes employee and workforce data to the CRM database.
- PeopleSoft Financial Management Solutions and PeopleSoft Supply Chain Management (PeopleSoft SCM) for customer, contact, and product information.

  This is a two-way integration.
- PeopleSoft Enterprise Performance Management (PeopleSoft EPM), which publishes the data mining results from Customer Behavior Modeling for use in PeopleSoft CRM.

By taking advantage of the integration technology that PeopleSoft software provides and the existing integrations with PeopleSoft HCM, PeopleSoft Financial Management Solutions, and PeopleSoft SCM, you can integrate with other third-party systems. PeopleSoft CRM achieves integration using Application Messaging, Business Interlinks, and the PeopleTools Integration Broker technology.

PeopleSoft CRM offers many ways of integrating with third-party applications. For example, if you send or publish a message to a third-party system, the system structures the data into a message and automatically delivers it to the destination location. You can also accept or subscribe to messages from third-party systems. The system validates incoming data, checking for errors before updating the system of record.

You can also send a synchronous request or reply transaction to a third-party system for processing and receive a real-time response.

Note. There is no CRM LOCATION_SYNC_EFF, LOCATION_FULLSYNC_EFF, DEPT_SYNC_EFF and DEPT_FULLSYNC_EFF message in CRM. The LOCATION_SYNC, LOCATION_FULLSYNC, DEPT_SYNC, and DEPT_FULLSYNC messages contain both the SYNC and EFF message structures.

See Also

PeopleTools 8.52: PeopleSoft Integration Broker PeopleBook

PeopleTools 8.52: PeopleSoft Integration Broker Testing Utilities & Tools PeopleBook

PeopleSoft CRM Foundation EIPs

This table lists the EIPs that are provided with PeopleSoft software for foundation PeopleSoft CRM:

EIP Name	***Description***	***Message Name***	***Direction of Integration***	***Technology***
CUSTOMER	Customer information is retrieved to PeopleSoft CRM from other external systems.	CUSTOMER_SYNC CUSTOMER_FULLSYNC_EFF	PeopleSoft CRM ↔ SCM/external system	Application Message
CUSTOMER_COMPANY	Synchronizes company information with other systems.	CUST_COMPANY_FULLSYNC CUST_COMPANY_FULLSYNC_EFF CUST_COMPANY_SYNC CUST_COMPANY_SYNC_EFF	PeopleSoft CRM ↔ SCM/external system	Application Message
CUSTOMER_CONSUMER	Synchronizes consumer information with other systems.	CUST_CONSUMER_FULLSYNC CUST_CONSUMER_FULLSYNC_EFF CUST_CONSUMER_SYNC CUST_CONSUMER_SYNC_EFF	PeopleSoft CRM ↔ SCM/external system	Application Message
CUSTOMER_SITE	Synchronizes site information with other systems.	CUST_SITE_FULLSYNC CUST_SITE_FULLSYNC_EFF CUST_SITE_SYNC CUST_SITE_SYNC_EFF	PeopleSoft CRM ↔ SCM/external system	Application Message

EIP Name	***Description***	***Message Name***	***Direction of Integration***	***Technology***
WORKER	Synchronizes worker information with other systems.	WORKER_FULLSYNC WORKER_FULLSYNC_EFF WORKER_SYNC WORKER_SYNC_EFF	PeopleSoft CRM –>external system	Application Message
CUSTOMER_CONTACT	Synchronizes contact information with other systems.	CONTACT_SYNC CONTACT_SYNC_EFF CONTACT_FULLSYNC CONTACT_FULLSYNC_EFF	PeopleSoft CRM ↔ SCM/external system	Application Message
PARTNER_PROFILE	Synchronizes partner program information with other systems.	PARTNER_PROFILE_SYNC PARTNER_PROFILE_FULLSYNC	PeopleSoft CRM ↔ SCM/external system	Application Message
BUSINESS UNIT TABLE FS	Synchronizes financial business unit data.	BUS_UNIT_FS_FULLSYNC BUS_UNIT_FS_SYNC	PeopleSoft CRM ↔ SCM	Application Message
TABLE SET CONTROL	Synchronizes setID data.	SETID_INITIALIZE	PeopleSoft CRM ↔ SCM	Application Message
COUNTRY TABLE	Synchronizes country codes and address data to an external system.	COUNTRY_FULLSYNC COUNTRY_SYNC	PeopleSoft CRM ↔ SCM/HCM/External system	Application Message
STATE TABLE	Synchronizes state name, description, and abbreviation information with an external system.	STATE_FULLSYNC STATE_SYNC	PeopleSoft CRM ↔ SCM/HCM/external system	Application Message
UNIT OF MEASURE	Synchronizes units of measure.	UOM_FULLSYNC UOM_SYNC	PeopleSoft SCM/HCM/external system –> CRM	Application Message

EIP Name	***Description***	***Message Name***	***Direction of Integration***	***Technology***
CURRENCY CODE TABLE	Transmits currency code data.	CURRENCY_FULLSYNC CURRENCY_SYNC	PeopleSoft CRM ↔ SCM/external system	Application Message
MARKET RATES DATA	Imports and synchronizes updated market rates.	CURR_QUOTE_MTHD_FULLSYNC CURR_QUOTE_MTHD_SYNC MARKET_RATE_DEFN_FULLSYNC MARKET_RATE_DEFN_SYNC MARKET_RATE_FULLSYNC MARKET_RATE_SYNC MARKET_RATE_LOAD MARKET_RATE_INDEX_FULLSYNC MARKET_RATE_INDEX_SYNC MARKET_RATE_TYPE_FULLSYNC MARKET_RATE_TYPE_SYNC	PeopleSoft CRM ↔ SCM/HCM/external system	Application Message
DEPARTMENT TABLE	Synchronizes departments across the enterprise.	DEPT_FULLSYNC DEPT_SYNC	PeopleSoft CRM ↔ SCM/HCM/external system	Application Message
LOCATION TABLE	Synchronizes location table data across the enterprise.	LOCATION_FULLSYNC LOCATION_SYNC	PeopleSoft CRM ↔ SCM/HCM/external system	Application Message
PRODUCT	Synchronizes product information with PeopleSoft SCM or third-party external systems.	PRODUCT_FULLSYNC PRODUCT_SYNC PRODUCT_GROUP_FULLSYNC PRODUCT_GROUP_SYNC PRODUCT_SYNC_EFF	PeopleSoft CRM ↔ SCM/external system	Integration Broker

EIP Name	*Description*	*Message Name*	*Direction of Integration*	*Technology*
COMPETENCY TYPE	Receives competency information from PeopleSoft HCM.	CM_TYPE_FULLSYNC CM_TYPE_SYNC	PeopleSoft CRM ← HCM	Application Message
COMPETENCY TABLE	Receives competency and accomplishment details from PeopleSoft HCM.	COMPETENCY_FULLSYNC1 COMPETENCY_SYNC1	PeopleSoft CRM ← HCM	Application Message
PERSON COMPETENCY	Receives a person's competency data from PeopleSoft HCM.	PERSON_COMPETENCY_FULLSYNC PERSON_COMPETENCY_SYNC	PeopleSoft CRM ← HCM	Application Message
RATING MODEL	Receives rating model data from PeopleSoft HCM.	RATING_MODEL_FULLSYNC RATING_MODEL_SYNC	PeopleSoft CRM ← HCM	Application Message
PERSONAL DATA	Synchronizes personal data from PeopleSoft HCM.	PERSON_BASIC_FULLSYNC PERSON_BASIC_SYNC	PeopleSoft CRM ← HCM	Application Message
WORKFORCE DATA	Synchronizes workforce data from PeopleSoft HCM.	WORKFORCE_FULLSYNC WORKFORCE_SYNC	PeopleSoft CRM ← HCM	Application Message
PERSON OF INTEREST DATA	Synchronizes persons of interest (POIs) that do not have a job record from PeopleSoft HCM. POIs with a job record are synchronized in the WORKFORCE DATA EIP.	PERS_POI SYNC	PeopleSoft CRM ← HCM	Application Message

EIP Name	***Description***	***Message Name***	***Direction of Integration***	***Technology***
CALENDAR/TASK	Fully synchronizes the calendar with Outlook, Lotus Notes, or other personal information manager (PIM).	PIM_CONTACT_SYNC	PeopleSoft CRM ↔ Outlook/PIM	Application Message
CUSTOMER GROUP	Synchronizes customer groups.	CUSTOMER_GROUP_FULLSYNC CUSTOMER_GROUP_SYNC	PeopleSoft CRM ↔ SCM	Application Message
REPRESENTATIVE	Synchronizes representative data with PIM.	PIM_CONTACT_SYNC REP_SYNC	PeopleSoft CRM ↔ Personal Information Manager (PIM)	Application Message
PS GETID	Retrieves customer IDs and contact IDs from other PeopleSoft systems.	PSGETID	PeopleSoft CRM ↔ SCM	XML link
GET CUSTOMER VALUE	Retrieves customer value/KPI information from PeopleSoft EPM and updates the BC (Business Contact) and the RB_CLAF_EPM_KIP (Key Performance Indicator) tables in the PeopleSoft CRM database.	KP_KPI_ASMT_FACTS	PeopleSoft CRM ↔ EPM	Application Message

EIP Name	Description	Message Name	Direction of Integration	Technology
GET BILLS FOR 360 DEGREE VIEW	• Requests billing information (bills) from PeopleSoft Billing to display in the 360-Degree View. • PeopleSoft Billing responds with the billing information that is requested from the PeopleSoft CRM 360-Degree View.	• BI_EIP360_REQ • BI_EIP360_RSP	• PeopleSoft CRM ↔ SCM • PeopleSoft CRM ↔ SCM	• Application Message • Application Message
GET ACCOUNT RECEIVABLES FOR 360 DEGREE VIEW	• Requests payment information (payments) from PeopleSoft Receivables to display in the 360-Degree View. • PeopleSoft Receivables responds with the payment information that is requested from the PeopleSoft CRM 360-Degree View.	• AR_CRM_REQUEST • AR_CRM_RESPONSE	• PeopleSoft CRM ↔ Financial Management Solutions • PeopleSoft CRM ↔ Financial Management Solutions	• Application Message • Application Message

EIPs that support particular business processes and applications are documented in other PeopleSoft CRM PeopleBooks. The online EIP Catalog database lists, with technical details, the EIPs that PeopleSoft CRM uses.

See Also

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Integrating with Fulfillment and Billing Systems"

PeopleSoft Integrated FieldService 9.1 PeopleBook, "Integrating with PeopleSoft Applications"

Application Messages

EIPs that publish data to another database are available as both FULLSYNC and SYNC messages. FULLSYNC messages are designed for use at implementation time for setup information. Once a table has been set up, the SYNC messages allow for updates to that data.

Important! Some FULLSYNC messages are designed to fully replace the data through the use of the header message. To avoid losing existing data, turn off the header**—**the message refreshes the data by updating the existing data and adding any missing data.

Application Message Setup

As delivered, PeopleSoft EIP application messages are inactive.

To set up a delivered application message:

1. Activate the application message.
2. For inbound messages, activate the message subscription PeopleCode.
3. Set the associated message channel to Run mode.
4. Configure an existing message node or define a new message node.
5. Define asynchronous or synchronous transactions on the message node.
6. Define relationships to reconcile transaction parameters for routing, transmission type, message structure, or message content, if necessary.

See *PeopleTools 8.52: PeopleSoft Integration Broker PeopleBook*

Data Mapping for Application Messages

PeopleSoft CRM has the capability of subscribing to other PeopleSoft-application or third-party-application messages. Before PeopleSoft CRM can subscribe to a PeopleSoft EPM message or any third-party message, data mapping must occur between the source format and the destination format. To accommodate this data mapping, PeopleSoft CRM created a Data Mapping component. Using this component, you can perform data mapping for any single-level hierarchical message.

The integration between PeopleSoft EPM and CRM is currently the one place that uses this data mapping component. Before PeopleSoft CRM can receive key performance indicator (KPI) information through the KP_KPI_ASMT_FACTS application message from EPM, the application message data must be mapped to data fields that the CRM system recognizes. To assist with this integration, PeopleSoft provides a predefined data mapping structure sample.

Alternatively, data is inserted into RB_CLAF_EPM_KPI table via the KP_KPI_EPM terms subscription. This subscription creates terms for the Active Analytics Framework.

This table shows the predefined data mapping structure sample provided with PeopleSoft software to assist with integration between PeopleSoft CRM and EPM:

Message Name	***Record to Update***	***Fields to Update Field/XML Tag***	***Record Identification Field/XML Tag***	***Message Row Identification XML Tag Name/XML Tag Value***
KP_KPI_ASMT_FACTS	BC	• ASSESS_DESCR/ASSESSSDESCR • ASSESS_ID/ASSESS_ID • ASSESS_IMAGE_ID/ASSESS_IMAGE_ID • KPI_ID/KPI_ID • PCT_OF_TARGET/PCT_OF_TARGET • RESOLVED_VALUE/RESOLVED_VALUE	CUST_ID/OBJ_ID	PF_OBJECT_TYPE/CUSTOMER MASTER

See Also

Chapter 9, "Defining Company Business Objects," Defining Company Information, page 139

Chapter 11, "Defining Person Business Objects," Defining Person Information, page 174

Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," Mapping Message Data to PeopleSoft CRM Records and Fields, page 375

Integration with PeopleSoft HCM, PeopleSoft Campus Solutions or Third-Party HR Data

This section discusses:

- Person Basic Fullsync and Person Basic Sync.

- Workforce Fullsync and Workforce Sync.
- Campus Solutions EIPs.
- Pers POI Sync.
- Customer Data Model EIP.
- Implementation using Fullsyncs.

PeopleSoft CRM employs a number of EIPs to integrate the CRM Customer Data Model (CDM) with PeopleSoft HCM, PeopleSoft Campus Solutions, or another third-party system. The interdependent nature of these EIPs makes it very important that they are used correctly and in the proper sequence to ensure data quality.

Person Basic Fullsync and Person Basic Sync

The Person Basic EIPs form the foundation of the CDM integrations. They are responsible for creating the Person object that is the building block of the CDM. Additional duties include the populating and updating of personal biographical data, National ID, and names. Finally, all creation and maintenance of contact methods (address, email, phone) are processed through the Person Basic EIPs.

Person Basic Fullsync versus Person Basic Sync

Person Basic Fullsync is designed as an initial load program to be used during system implementation to create new persons in the CDM. While it is possible to run Person Basic Fullsync more than once, it will not perform updates on existing person data or contact methods. Any existing person found in the fullsync message is skipped and written to a log file for review.

Once Person Basic Fullsync has been used for initial customer population creation, it should be deactivated and the incremental Person Basic Sync message activated. Person Basic Sync handles the creation of persons going forward as well as any subsequent updates to personal biographical data, National ID, names, and contact methods.

Search Match

Search Match is a utility that validates whether a new person being added to the CDM via an import or EIP actually already exists in CRM in order to avoid data duplication. The matching is based on a set of predefined criteria set in the Search Match configuration. Person Basic Sync is compatible with Search Match and, if enabled, will perform the matching function. Person Basic Fullsync, however, is not compatible with Search Match.

See and *PeopleSoft CRM for Higher Education 9.1 PeopleBook*, "Recruiting Students," Using Search/Match with PERSON_BASIC_SYNC.

Contact Methods and Person Start Date

When the Person Basic EIPs create a new Person object, the new person is given the default *Individual* role type. It is important for data integrity that any contact methods created for the person do not have a start date that is earlier than the start date of the individual role. The possibility of this issue often arises in instances of a legacy data conversion where an extensive history of person data is being loaded into CRM for the first time. To handle this scenario, a comparison algorithm is performed using the inbound data so that the start date of the person object is set to the earliest of these three dates: the effective date of the PERSON_DATA_EFFDT record, the original hire date, and the earliest contact method effective date.

Example:

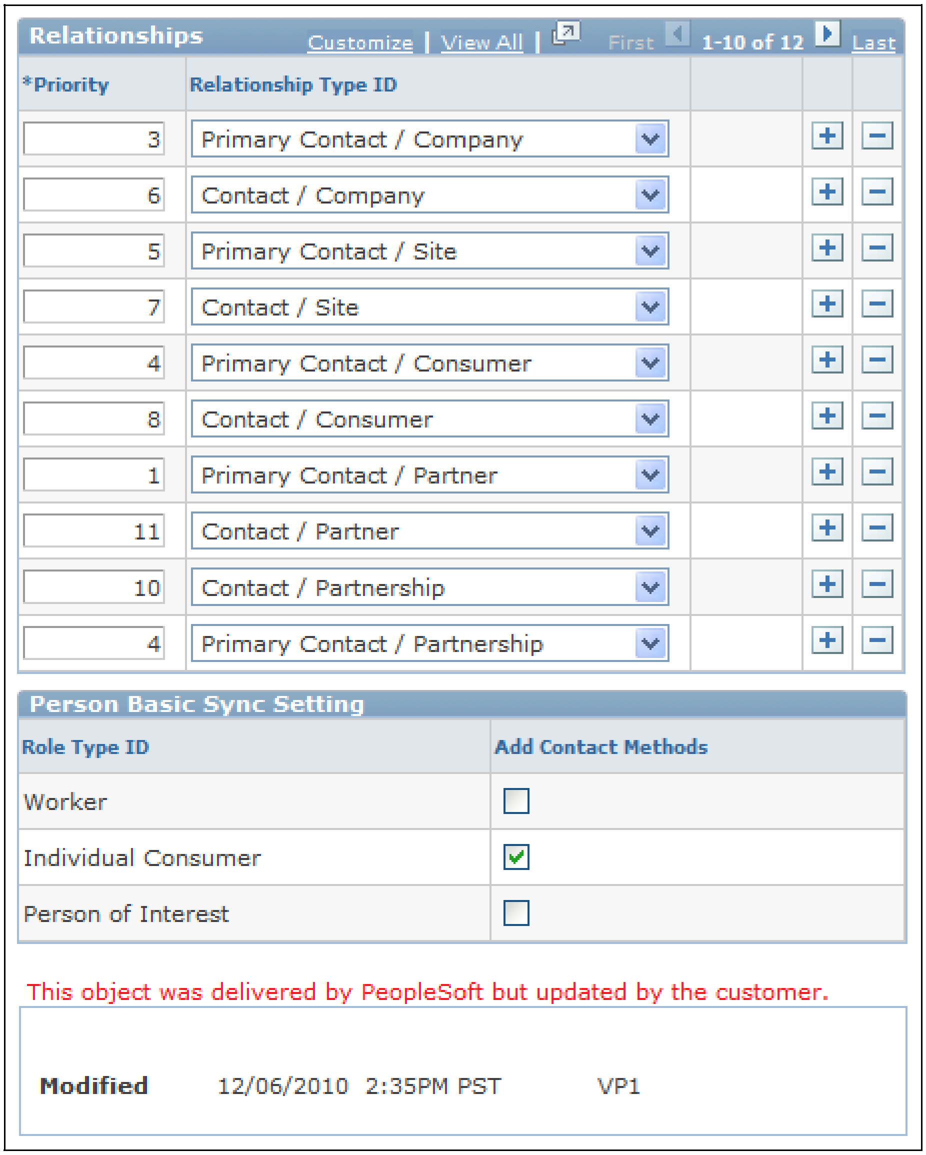
Person_Data_Effdt.Effdt	***Person_Data_Effdt.Orig_Hire_Dt***	***Earliest Contact Method Effdt***	***Person Object, Individual Role Start Date***
6/20/2010	5/01/2010	5/02/2010	05/01/2010
6/20/2010	Null	04/01/2010	04/01/2010
6/20/2010	6/15/2010	07/01/2010	06/15/2010

Note. The audit *Date Stamp* on the CDM entry will reflect the day and time that the Person Basic message is processed by CRM and the record is added to the database. The *Date Stamp* may not match the *Person Role Start Date* if the *Person Role Start Date* is adjusted as in the above examples. This may also occur if there is an extended processing delay between the time the message is published from HCM and ultimately received and processed by CRM.

Adding Contact Methods Across Roles

Person Basic EIPs provide only the *Individual* role when a person is created. Additional roles such as *Worker* or *Consumer* are added to persons later by the other CDM EIPs that rely on the Person object having already been created. Despite this, Person Basic Sync is responsible for the subsequent contact method maintenance across all roles held by the person.

When Person Basic Sync receives a request to add a new contact method of a particular contact method type (address, email, phone) for an existing person, it uses the configuration on the Contact Method Type definition to determine which roles the contact method will be added to if they exist for the person. Available roles are *Individual Consumer,Worker,* and *POI* (person of interest).



Person Basic Sync Setting section of the Contact Method Type page

When a new contact method is created, it cannot have a start date that predates the established role to which it is to be associated. The start date of the contact method will be adjusted accordingly upon creation if necessary. This table lists several examples:

Person Basic Sync Run Date	***Inbound Contact Method Start Date***	***Role Exists?***	***Role Start Date***	***Resulting Contact Method Start Date***
5/30/2010	5/01/2010	Yes	1/1/2010	5/01/2010
5/30/2010	5/01/2010	Yes	5/15/2010	5/15/2010
5/30/2010	5/01/2010	No	5/30/2010	5/30/2010
5/30/2010	7/01/2010	Yes	1/1/2010	7/01/2010

Note. Contact methods that are entered manually into CRM are not maintained by Person Basic Sync.

See and Chapter 3, "Defining Control Values for Business Objects," Modifying Contact Method Types, page 36.

Person Basic Message Logging

During Person Basic EIP processing, some informational messages will be written to the message log. It happens, for example, when existing persons are skipped by Person Basic Fullsync or when there are issues with the Search Match configuration issues that need to be addressed. Additionally, the log can be used to debug integration issues should a Person Basic message go to error status. Users can access the log file after a run is completed through the Service Operations Monitor under this navigation: PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Asynchronous Services.

Select the completed PBS or PBS_FS message details.

Select the Error Messages link and the log will be displayed.

Workforce Fullsync and Workforce Sync

The Workforce EIPs are another important part of the CDM EIP structure. They are responsible for importing job and employment data for persons from PeopleSoft HCM or PeopleSoft Campus Solutions into CRM. Workforce is dependent on the Person Basic EIPs having already created the Person object for which the job and employment data is being synchronized. Workforce Fullsync is for initial load of job data and the incremental Workforce Sync handles updates and additions going forward.

Besides importing POI data, Workforce EIPs affect the CDM in two ways. First, they create the *Worker* role for the Person object if it does not already exist. Second, when the *Worker* role is added, any existing contact methods for that person are cloned and added to the *Worker* role. This is the only contact method interaction for Workforce EIPs; all subsequent changes or additions are processed through Person Basic Sync.

For import of employee job data from non-PeopleSoft third-party systems, the Worker Sync EIP is used.

Job Code Data

PeopleSoft CRM subscribes to all job information for worker and for POI. All fields (except for Physical Location) in the Worker component are updated from PeopleSoft HCM.

See Also

Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," Worker Data Integration with Third-Party Systems, page 364

Campus Solutions EIPs

PeopleSoft Campus Solutions maintains multiple EIP integrations with CRM to add and maintain student and prospective student data. Not all of these EIPs interact with the CDM, though a select few do (see the *CDM Message Summary* session below). These messages are dependent on the Person Basic EIPs having already created the Person object for which the data is being synchronized.

The Campus Solutions EIPs create the *Consumer* role for the Person object if it does not already exist. Also, when the *Consumer* role is added, any existing contact methods for that person are cloned and added to the Consumer Role. This is the only contact method interaction for Campus Solutions EIPs; all subsequent changes or additions are processed through Person Basic Sync.

See Also

PeopleSoft CRM for Higher Education 9.1 PeopleBook, "Oracle's PeopleSoft CRM for Higher Education Preface"

Pers POI Sync

The Pers POI EIP is an important part of the CDM EIP structure. It is responsible for importing POI data for persons from PeopleSoft HCM or PeopelSoft Campus Solutions into CRM. Pers POI Sync is dependent on the Person Basic EIPs having already created the Person object for which the data is being synced.

Pers POI Sync creates the *POI* role for the Person object if it does not already exist. Also, when the *POI* role is added, any existing contact methods for that person are cloned and added to the *POI* role. This is the only contact method interaction for Pers POI Sync; all subsequent changes or additions are processed through Person Basic Sync.

Customer Data Model EIP Sequence

Due to the interdependent nature of the EIPs which are creating and modifying CDM information, it is vital that CRM receives and processes them in the correct order. Because the Person Basic EIPs create the foundation Person object, those messages must always be received and processed before subsequent Workforce or Campus EIPs for that same person. Failure to do so can result in data loss, inconsistent data between the CRM and the source system, or both.

To ensure that the messages are received and processed in the correct order, the EIPs are delivered in a single ordered message queue. Messages should not be removed from this queue.

CDM Message Summary

This table lists the delivered CDM messages:

Message Name	***Publishing Product(s)***	***Creates Role***	***Message Queue***
PERSON_BASIC_SYNC	PeopleSoft HCM or Third-Party	1 – Individual	PERSON_DATA
PERSON_BASIC_FULLSYNC	PeopleSoft HCM or Third-Party	1 – Individual	PERSON_DATA
WORKFORCE_SYNC	PeopleSoft HCM	4 – Worker	PERSON_DATA
WORKFORCE_FULLSYNC	PeopleSoft HCM	4 – Worker	PERSON_DATA

Message Name	Publishing Product(s)	Creates Role	Message Queue
PERS_POI_SYNC	PeopleSoft HCM	88 – Person of Interest	PERSON_DATA
CS_TESTSCORES_FULLSYNC	PeopleSoft Campus Solutions	9 - Consumer	PERSON_DATA
CS_ADM_APPL_DATA_FULLSYNC	PeopleSoft Campus Solutions	9 – Consumer	PERSON_DATA
CS_ADM_PRSPCT_DATA_FULLSYNC	PeopleSoft Campus Solutions	9 - Consumer	PERSON_DATA
SAD_ADM_APPL_DATA_SYNC	PeopleSoft Campus Solutions	9 - Consumer	PERSON_DATA
SAD_ADM_PRSPCT_DATA_SYNC	PeopleSoft Campus Solutions	9 - Consumer	PERSON_DATA
SAD_TEST_SCORES_SYNC	PeopleSoft Campus Solutions	9 - Consumer	PERSON_DATA
RC_EBS_PERSON_INC_SERVICE	Oracle E-Business Suite	1 – Individual	PERSON_DATA
RC_EBS_WORKFORCE_INC_SERVICE	Oracle E-Business Suite	4 – Worker	PERSON_DATA

Implementation Using Fullsyncs

You should perform FULLSYNC messages at implementation time to set up your PeopleSoft CRM database correctly.

To set up your database with FULLSYNC messages (recommended sequence):

1. Before you run the main EIPs, run these common EIPs:
    a. Country
    b. State
    c. Currency
    d. SetID Initialization
    e. Table Set Control Initialization
    f. Location
    g. Business Unit
2. Run the Person Basic Sync EIP.

3. Run the Workforce EIP group.
   a. Department
   b. Job Code
   c. Workforce
4. Run the Person Competencies EIP group.
   a. CM_TYPE
   b. Rating Model
   c. Competency
   d. Person Competency
5. Inactivate the FULLSYNC messages and activate the corresponding SYNC messages.

SYNC messages always originate in PeopleSoft HCM or a third-party system and publish to PeopleSoft CRM. Thus, any field in PeopleSoft CRM that an EIP populates must be maintained from the originating source database, whether it is PeopleSoft HCM or a third-party system.

Note. If you create workers within PeopleSoft CRM, you must maintain these workers in CRM until you create them in an HR or third-party database.

Data Integrations

This section discusses:

- Customer and contact data integration with PeopleSoft FSCM.
- Worker data integration with third-party systems.
- Product data integration.
- Bill and payment data integration.
- Other integration considerations.

Customer and Contact Data Integration with PeopleSoft FSCM

In PeopleSoft CRM, a *customer* can be either a company, a partner company, a consumer, or a site that is associated with a company or consumer. A *contact* is any person who performs transactions on a customer's behalf.

Company, Consumer, Site, and Contact EIPs

Use the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, and CUSTOMER_SITE EIPs to synchronize customer information with other systems. When you implement these EIPs, application messages are published whenever a company, partner company, consumer, or site record in the PeopleSoft CRM system is added or modified. PeopleSoft CRM can also subscribe to these EIP application messages that are published when these records are modified in another system.

Note. CRM cannot publish a company with grandparent companies to SCM, because SCM only supports a two-level customer hierarchy, whereas CRM can support multi-level customer hierarchies. If you have implemented the CUSTOMER_COMPANY EIP and a company with grandparent companies is added in the Company component, this online message is issued:

SCM doesn't allow multi-level customer hierarchy, No message will be published

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The PARTNER_PROFILE EIP is triggered when you update data for a company that has the Partner role. It publishes an application message whenever a partner record is added or modified. The data in this EIP contains only information that is specific to the Partner role. The CUSTOMER_COMPANY EIP is also published to synchronize the basic company information.

The CUSTOMER_CONTACT EIP enables you to synchronize customer contact information with another system. When you implement the CUSTOMER_CONTACT EIP, application messages are published when a contact record in the PeopleSoft CRM system is added or modified. CRM can also subscribe to CUSTOMER_CONTACT EIP application messages that are published when these records are modified in another system.

Important! You must market-enable the Company, Consumer, Site, Partner Profile, and Contact EIPs before PeopleSoft CRM can send customer (company, partner profile, consumer, and site) and contact data to other databases. Market-enabling enables you to specify what data the PeopleSoft CRM system sends to other systems for a specific market. For example, you might opt not to publish certain customer and contact data to an external system for the FSI market. At the minimum, you must specify a global market to interface all non-market specific data.

See and Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," Market-Enabling Company, Consumer, Site, and Contact EIPs, page 371.

Partner Profile EIP

This EIP is triggered when you update data for a company that has the Partner role.

See and *PeopleSoft Partner Relationship Management 9.1 PeopleBook.*

Site Considerations

Only CRM sites that are flagged with the bill-to or sold- to purchasing options are integrated as customers with PeopleSoft SCM. If a site is flagged as Ship To only then the site is integrated with PeopleSoft SCM as an address to the company with which the site is associated.

When you add the bill-to or sold-to flag to a ship-to site, the system publishes the site message to create a new customer in PeopleSoft SCM. However, if a customer already exists in PeopleSoft SCM, removing the bill-to and sold-to options from the site does not remove the customer information for that site in PeopleSoft SCM.

Specifying Customer ID and Contact ID Default Values

You must specify the system that owns the customer ID and contact ID and verify the automatic numbering for ID generation for each setID.

See and Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," page 343.

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

Customer and Contact Integration with Other PeopleSoft Applications

Unlike PeopleSoft CRM, PeopleSoft Financial Management Solutions and PeopleSoft SCM do not distinguish between company, consumer, and site records. CUSTOMER_COMPANY, CUSTOMER_CONSUMER, and CUSTOMER_SITE EIP application messages to which these systems subscribe are all mapped to customer records with unique customer IDs in the PeopleSoft Financial Management Solutions and PeopleSoft SCM systems.

When customer records are added or modified in PeopleSoft Financial Management Solutions and PeopleSoft SCM, the system publishes application messages using the Customer EIP. These messages are mapped to companies in the PeopleSoft CRM system.

When a record that is created in PeopleSoft CRM is modified in PeopleSoft Financial Management Solutions and PeopleSoft SCM, the system uses the record key information (customer ID and setID) that is included in the application message that's reporting the change to derive the record's original business object ID in PeopleSoft CRM. This enables CRM to apply the changes that are reported in the application message to the corresponding company, consumer, or site record.

To ensure uniqueness of customer ID and contact ID between multiple PeopleSoft CRM databases, you must specify the system that owns the customer ID and contact ID and verify the automatic numbering for ID generation for each setID.

See and Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," Establishing Master ID Databases, page 372.

Note. The CUSTOMER_COMPANY, CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and CUSTOMER_SITE EIPs enable you to maintain customer information in multiple databases. However, to simplify integration of customer information, choose one database as the system of record for customer maintenance, and use PeopleTools Applications Portal technology to support customer information inquiries from the other systems. If you maintain customer and contact information in multiple databases, you must consider additional design, planning, and integration steps.

Customer and Contact EIP Application Messages Processing Order

In PeopleSoft CRM, because contacts can be associated with a company, consumer, or site, the company, consumer, or site record should be created before the contact record. When you implement the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and CUSTOMER_SITE EIPs, make sure that the application messages from the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, and CUSTOMER_SITE EIPs are processed before application messages from the CUSTOMER_CONTACT EIP when performing a FULLSYNC process.

Maintaining Customer and Contact Information in Different Databases

In PeopleSoft, customers exist in PeopleSoft CRM, PeopleSoft SCM, and PeopleSoft Financial Management Solutions. There are a number of ways to design the system to integrate between PeopleSoft CRM, PeopleSoft SCM, and PeopleSoft Financial Management Solutions. The simplest way to integrate customer master information is to manage all customer maintenance out of one database and support inquiry only on the other databases. Then you can use PeopleTools Applications Portal technology to access either system.

You might have a compelling business reason to maintain customer and contact information in different databases. For example, you may elect to have your front office users create customers in the PeopleSoft CRM database but want to use the Receivables payment processing options that are available only in Financial Management Solutions.

If you choose to maintain customer (company, consumer, and site) and contact information in different databases, you must:

- Define which database owns the customer and contact ID number assignment on the Master ID DB Setup page.

  By specifying an owner, the system will be consistent in assigning a unique customer or contact ID for a particular customer or contact across different databases.

- Set up defaulting for the CRM Name Type field on the Name Type Defaults page.

  You cannot add new contacts or customers to the PeopleSoft CRM database through the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and CUSTOMER_SITE EIPs unless you complete this step.

- Set up at least one PeopleSoft CRM market control code for interfacing CRM customer and contact data to other databases.

- Evaluate whether you plan to define customers as bill-to customers in PeopleSoft CRM.

  In PeopleSoft SCM and PeopleSoft Financial Management Solutions, customers that you define as bill-to customers must also have a defined collector and credit analyst. To ensure that PeopleSoft CRM passes these required fields to PeopleSoft SCM and PeopleSoft Financial Management Solutions, select the Collector/Credit Analyst Req (collector/credit analyst required) check box on the Installation Setup table. This ensures that PeopleSoft CRM satisfies the required field edit that is needed to populate PeopleSoft Financial Management Solutions and PeopleSoft SCM. Set up defaulting of these values on the Interface Defaults page under Define Integration Rules.

- Manually keep the Collector and Credit Analyst table in PeopleSoft CRM in sync with the PeopleSoft Financial Management Solutions and PeopleSoft SCM Collector and Credit Analyst table.

- Establish a default support team code in PeopleSoft CRM for each setID to be used in when creating a customer.

  In PeopleSoft SCM and PeopleSoft Financial Management Solutions, a default support team code is required for each customer. To satisfy the required field edit, PeopleSoft CRM enables you to set up a default value on the Interface Defaults page under Define Integration Rules. In addition, ensure that the value set up on the Default page also exists on the PeopleSoft SCM and PeopleSoft Financial Management Solutions system.

PeopleSoft FSCM Customer-Related Pages That Are Unavailable in PeopleSoft CRM

These pages in the PeopleSoft SCM or PeopleSoft Financial Management Solutions Customer component are not available in CRM:

- Vendor Info.
- Credit Profile - General.
- Credit Profile - Credit Check.
- Region Code Info.
- Subcustomer Info.
- Customer Group Info.
- Customer VAT Info (customer value-added tax information).
- Customer Notes Info.
- Attachments.
- Messages.
- User-Defined 1.
- User-Defined 2.
- Payment Options.
- Write-Off Info.
- Hierarchy.
- Product Catalog.
- Product Aliases.
- Additional Ship To Options.
- Ship Exception Dates.
- Carrier Acct Number (carrier account number).

Note. If the PeopleSoft CRM installation is integrated with either PeopleSoft SCM or PeopleSoft Financial Management Solutions, you can access these pages through those applications.

The Products component in PeopleSoft SCM and PeopleSoft Financial Management Solutions uses these customer components, which are not available in CRM:

- Dun & Bradstreet.
- MICR Information.
- Corporate Customer Tree.
- Vendor Information.

- Corporate Tree Messages.
- Customer EFT Name (customer electronic funds transfer name).
- Quick Customer Create.

Note. You can access these pages through PeopleSoft SCM or PeopleSoft Financial Management Solutions if the PeopleSoft CRM installation is integrated with those systems.

See Also

Chapter 11, "Defining Person Business Objects," Defining Consumer Information, page 185

Chapter 5, "Defining Purchasing Options for Companies, Consumers, and Sites," page 77

PeopleSoft 9.1 PeopleBook: Enterprise Components

Worker Data Integration with Third-Party Systems

Use the Worker EIP to synchronize worker information with another system. In PeopleSoft CRM, workers are people who work for you. When you implement the Worker EIP, application messages are published when a worker record in the PeopleSoft CRM system is added or modified. PeopleSoft CRM can also subscribe to Worker EIP application messages that are published when these records are modified in another system. The Worker EIP enables PeopleSoft CRM to accept and create future dated workers that were created in another system and to which CRM subscribed.

Product Data Integration

Integrate product data using the PeopleTools 8.5 Integration Broker. This technology enables both synchronous and asynchronous messages to be transmitted using one technology. The PRODUCT_SYNC and PRODUCT_FULLSYNC messages are used to both publish and subscribe to data between PeopleSoft CRM and PeopleSoft SCM or a third-party system.

Integrating from PeopleSoft SCM to PeopleSoft CRM

PeopleSoft CRM subscribes asynchronously to the PRODUCT_SYNC message that is coming from PeopleSoft SCM. This data is processed directly into the PeopleSoft CRM product tables using Component Interfaces (CIs).

A product package header record is added for any kit components that are received from PeopleSoft SCM.

Integrating from PeopleSoft CRM to PeopleSoft SCM

PeopleSoft CRM publishes the PRODUCT_SYNC message whenever product data is added, changed, or deleted through the Product Definition (PROD_DEFN), Product Package (PRODKIT_SUMMARY), Pricing (PROD_PRICE), Package Pricing (PRODKIT_COMPS_PRICE), Notes (PROD_NOTE), Relationships (PROD_RELATIONS_CMP), and Product Attributes by UOM (product attributes by unit of measure; PROD_UOM) pages.

The 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 allow packages within packages, package components that are themselves packages are also stripped from the message.

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

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.

Integrating from PeopleSoft CRM to a third-party SCM database

PeopleSoft CRM publishes the PRODUCT_SYNC message whenever product data is added, changed, or deleted through the Product Definition, Product Package, Pricing, Package Pricing, Notes, Relationships, and Product Attributes by UOM components. Integration Broker passes the message to the subscribing system.

Bill and Payment Data Integration

PeopleSoft CRM integrates with Billing and Receivables to obtain billing information—invoices—and payments that are associated with a company, consumer, or contact. If a person is a contact of a company and that role is selected in the Role field in 360-Degree View, then the 360-Degree View EIPs retrieve invoices and payments for the company and not for the contact.

The PeopleSoft CRM 360-Degree View can display invoices and payments under those nodes in the 360-Degree View tree. When you define these types of nodes on the Define Node page in PeopleSoft CRM, you specify all of the necessary EIP details that are associated with that node.

To request invoices from PeopleSoft Billing, and for Billing to respond to the request, use the GET BILLS FOR 360 DEGREE VIEW EIP. This EIP consists of two application messages:

- BI_EIP360_REQ (request message)
- BI_EIP360_RSP (response message)

To request payments from PeopleSoft Receivables and for Receivables to respond to the request, use the GET ACCOUNT RECEIVABLES FOR 360 DEGREE VIEW EIP. This EIP consists of two application messages:

- AR_CRM_REQUEST (request message)
- AR_CRM_RESPONSE (response message)

All of the application messages that are used for integrating with 360-Degree View are synchronous.

PeopleSoft CRM passes the request parameters for the request application message using an application class method. This table lists the application classes that PeopleSoft CRM uses to pass the request parameters to Billing and Receivables:

PeopleSoft Application	***Class ID***	***Class Path***	***Method Name***
PeopleSoft Billing	EIP	RB_TD_360	PopulateBillRequestMsg
PeopleSoft Receivables	EIP	RB_TD_360	PopulatePaymentRequestMsg

See Also

PeopleSoft CRM 9.1 Industry Application Fundamentals PeopleBook

Performance Considerations

When you integrate large amounts of data with other systems, system performance is slowed. The following tips might help.

Data Maintenance in Multiple Systems

If you have both PeopleSoft CRM and PeopleSoft SCM databases, PeopleSoft recommends that you:

- Synchronize tables (such as Customer and Contacts) by running the FULLSYNC EIPs to perform a full batch publish to the subscribing system.

  Note. In general, FULLSYNC messages first delete all existing data in the target record and then load a copy of the source record. For Company, Consumer, Contact, and Site FULLSYNC messages that come into PeopleSoft CRM, no delete occurs; the data is merged into the existing data instead. This ensures data integrity within the PeopleSoft CRM system.

- Update databases in the subscribing system by running SYNC EIPs to perform incremental updates.

  SYNC messages modify, delete, or add only the data that a user affected while performing an individual transaction.

Cascading Addresses

You can set a system option that automatically updates addresses on related business objects whenever you update an address on a parent business object. When you enable this option, each update that occurs also triggers an EIP to publish the address change to PeopleSoft SCM.

See and Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Contact Information for Business Objects, page 58.

See Also

Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," Establishing Master ID Databases, page 372

Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," Setting Up Defaults for Integrating Customer and Contact Information, page 367

Chapter 17, "Managing Enterprise Integration for PeopleSoft CRM," Market-Enabling Company, Consumer, Site, and Contact EIPs, page 371

Setting Up Defaults for Integrating Customer and Contact Information

To set up defaults for integrating customer and contact information, use the Collector (COLLECTOR_TABLE), Credit Analyst (CR_ANALYST_TABLE), and General Options (RB_INSTALLATION) components.

This section discusses how to define default values for integrating customer and contact information.

Pages Used to Set Up Default Values for Integrating Customer and Contact Information

Page Name	Definition Name	Navigation	Usage
Collector	COLLECTOR_TABLE	Set Up CRM, Common Definitions, Customer, Collector	Create and maintain collector codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.
Credit Analyst	CR_ANALYST_TABLE	Set Up CRM, Common Definitions, Customer, Credit Analyst	Create and maintain credit analyst codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.
Support Team Code	TEAM_CODE_TBL	Set Up CRM, Common Definitions, Codes and Auto Numbering, Support Team Codes, Support Team Code	Create and maintain support team codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.
Interface Defaults	RB_EIP_DEFAULTS	Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Interface Defaults	Specify default values on customer records for fields that are required for integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM.
Name Type Options	RB_NM_TYPE_DFLT	Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Name Type Options	Specify default name type values to use on company and contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM.

Page Name	***Definition Name***	***Navigation***	***Usage***
General Options	RB_INSTALLATION	Set Up CRM, Install, Installation Options, General Options	Specify default exchange rate codes to use on company and contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM and ensure that required codes are available to the EIP.

Creating and Maintaining Collector Codes

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

Important! To ensure successful integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM, you must synchronize collector codes manually between PeopleSoft CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP application messages that include codes that are not available in the subscribing system will fail.

Creating and Maintaining Credit Analyst Codes

Access the Credit Analyst page (Set Up CRM, Common Definitions, Customer, Credit Analyst).

Important! To ensure successful integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM, you must synchronize credit analyst codes manually between PeopleSoft CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP application messages that include codes that are not available in the subscribing system will fail.

Creating and Maintaining Support Team Codes

Access the Support Team Code page (Set Up CRM, Common Definitions, Codes and Auto Numbering, Support Team Codes, Support Team Code).

Important! To ensure successful integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM, you must synchronize support team codes manually between PeopleSoft CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP application messages that include codes that are not available in the subscribing system will fail.

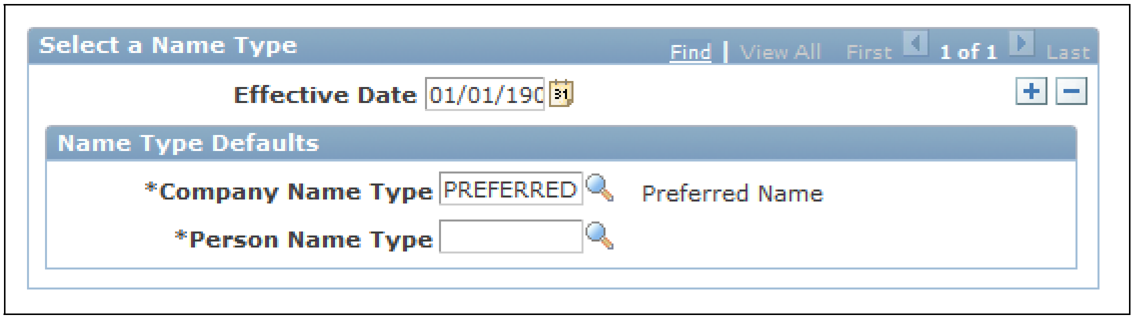
Specifying Interface Defaults

Access the Interface Defaults page (Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Interface Defaults).

When you create a customer or site record using the Company, Consumer, and Site components in PeopleSoft CRM, the system automatically populates the record with the values that you enter on the Interface Defaults page. Users can select alternate values for these fields using the Bill Options view of the Customer Roles page, which is available in each of the components.

Specifying Name Type Defaults

Access the Name Type Options page (Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Name Type Options).



Name Type Defaults page

PeopleSoft CRM requires name type codes to create all business object records; however, PeopleSoft Financial Management Solutions and PeopleSoft SCM do not require name codes. To ensure that records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM are populated with name types that are valid in CRM, you specify default name type values here.

See and Chapter 3, "Defining Control Values for Business Objects," Defining Business Object and Name Types, page 25.

Company Name Type

Enter the default value to use for name type on company records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM. The system uses this value on customer records that are received through Customer (company, consumer, site) EIP application messages.

Person Name Type

Enter the default value to use for name type on contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM. The system uses this value on contact records that are received through Contact EIP application messages.

Specifying Default Exchange Rates

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

Important! You must manually synchronize exchange rate codes between PeopleSoft CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP Application messages that include codes that are not available in the subscribing system will fail.

Ensuring Required Code Availability

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

Select the Collector/Credit Analyst Req check box. This prevents Customer (company, consumer, and site) EIP application message failures in PeopleSoft Financial Management Solutions and PeopleSoft SCM that are due to missing collector or credit analyst field values.

Market-Enabling Company, Consumer, Site, and Contact EIPs

To market-enable company, consumer, site, and contact EIPs, use the Market Control Codes (RB_MKT_CTL_DFN) and Market Installation Options (RB_MKT_CTL_TBL) components.

This section discusses how to specify the markets that PeopleSoft CRM integrates with.

Pages Used to Market-Enable Company, Consumer, Site, and Contact EIPs

Page Name	*Definition Name*	*Navigation*	*Usage*
Market Control Codes	RB_MKT_CTL_DFN	Set Up CRM, Common Definitions, Codes and Auto Numbering, Market Control Codes	Define market control codes for market-enabling the Customer (company, consumer, and site) and Contact EIPs.
Market Installation Options	RB_MKT_CTL_TBL	Set Up CRM, Install, Market Installation Options	Specify market options for a specific market or use with the Customer (company, consumer, and site) and Contact EIPs.
Build CDM (Customer Data Management) Interface Records	RB_INT_BUILD	Set Up CRM, Common Definitions, Integration Rules, Integration Utilities, Request Processes, Build CDM Interface Records	Run the Build CDM Interface Records Application Engine process (RB_INT_BUILD).

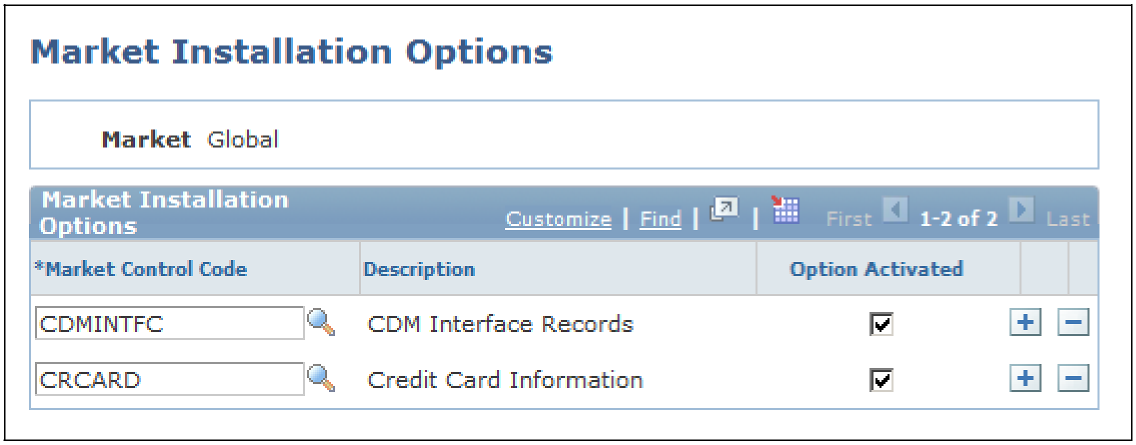
Defining Market Control Codes

Access the Market Control Codes page (Set Up CRM, Common Definitions, Codes and Auto Numbering, Market Control Codes).

Enter a market control code name and a description. Use the Comments field to add any more information. These control codes are used on the Market Installation Options page.

Specifying Market Installation Options

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



Market Installation Options page

Market Control Code

Select the market control code.

Note. *CDMINTFC* is the market control code for CDM interface records.

Option Activated

Select to activate the code.

Note. Use this page for market-enabling credit card information as well.

Building Business Object Relationship Model Interface Records

Access the Build CDM Interface Records page (Set Up CRM, Common Definitions, Integration Rules, Integration Utilities, Request Processes, Build CDM Interface Records).

Click Run to run the Build CDM Interface Records process, which populates the interface records.

Establishing Master ID Databases

This section lists prerequisites and discusses how to set up master ID databases.

Prerequisites

You must first set up number type codes that relate object IDs to databases.

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

Pages Used for Establishing Master ID Databases

Page Name	*Definition Name*	*Navigation*	*Usage*
Master ID DB Setup (master ID database setup)	RB_IDMASTER	Set Up CRM, Common Definitions, Integration Rules, Remote Data Access, Master ID Owner, Master ID DB Setup	Designate which systems have the source (or master) object IDs.
XML Test Utility	RB_XML_TEST	Set Up CRM, Common Definitions, Integration Rules, Remote Data Access, XML Test Utilities, XML Test Utility	Test calls between remote databases.

Designating the Systems That Have Master Object IDs

Access the Master ID DB Setup page (Set Up CRM, Common Definitions, Integration Rules, Remote Data Access, Master ID Owner, Master ID DB Setup).

Important! Use the Master ID DB Setup page to indicate the location of the master database that is responsible for issuing identifiers for customers, contacts, and so on. You *must* do this on all databases in the community except the master. Failure to do so may result in duplicate customer and contact identifiers.

Number Type

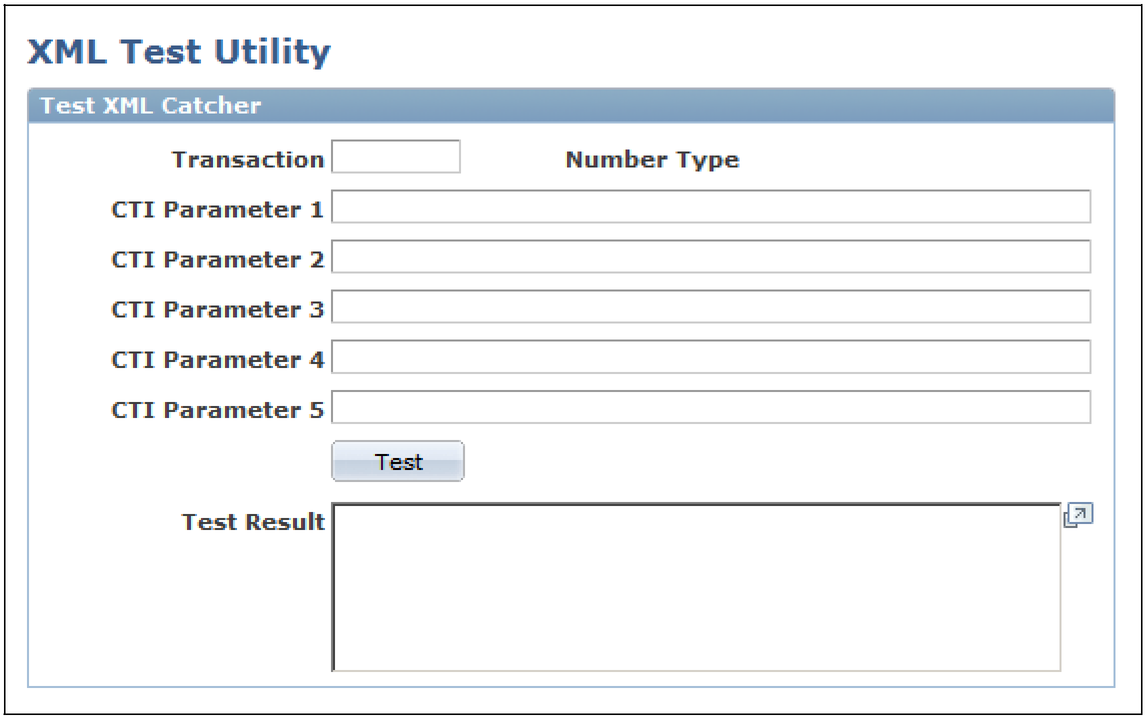
Select the objects whose IDs will be generated by the master database that appears in the Master Database URL (uniform resource locator) field. You can select the database for generating IDs for customers, contacts, products, sales orders, and quotes.

Master Database URL

Enter the database URL for the master database. When an application must obtain an identifier, it checks this field to see if there is a value. If there is no value, then the system issues the identifier itself, because it is assumed that the database is the master. If there is a value, the system contacts the remote master database for the identifier.

Testing Calls

Access the XML Test Utility page (Set Up CRM, Common Definitions, Integration Rules, Remote Data Access, XML Test Utilities, XML Test Utility).



XML Test Utility page

Transaction

Enter the identifier for the object whose ID generation you want to test. Enter *1* for customers, *2* for contacts, *3* for sales orders, *4* for quotes, and *5* for products. When you press Tab to exit the field, the system enters default values in the first three unlabeled text boxes.

The first unlabeled text box displays the setID or business unit for which the autonumber is to be generated; modify this if you like. Do not modify the other fields.

The second text box displays the next number to be generated. This is always *NEXT* by default; do not change the value.

The third field displays the zero padding indicator: *Y* (yes) to suppress leading zeros or *N* (no) to include leading zeros. You can modify this if you like.

The last two unlabeled fields are not used when testing autonumber generation.

Test

Click the Test button to fetch the next ID number from the external system. The result appears in the Text field. If the object's autonumbers come from the PeopleSoft CRM system (and not an external ID master), the Text field displays the word *Local.*

Note. This test increments the number in the external system's database.

Mapping Message Data to PeopleSoft CRM Records and Fields

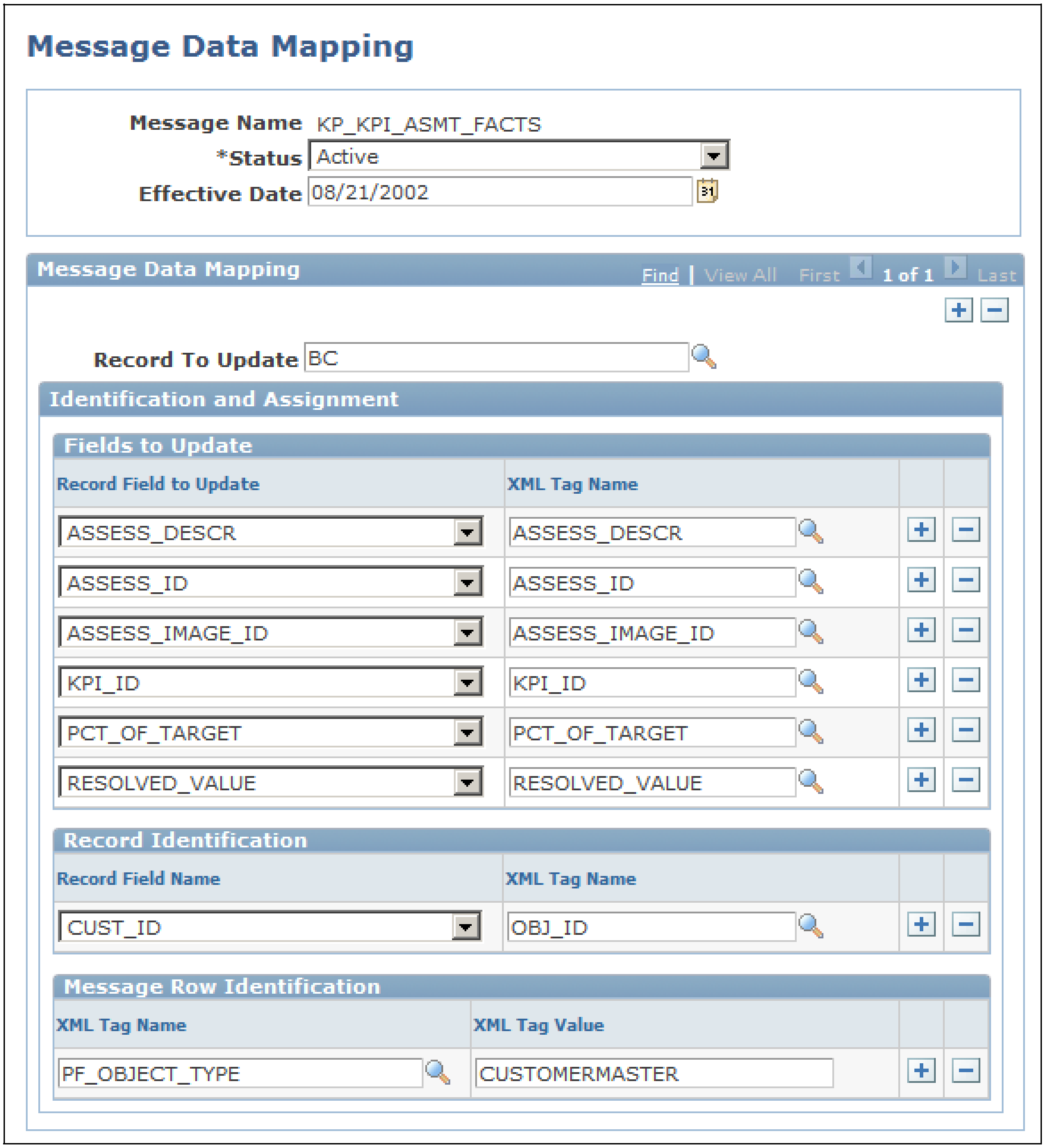
This section discusses how to map message data to PeopleSoft CRM records and fields.

Page Used to Map Message Data to PeopleSoft CRM Records and Fields

Page Name	*Definition Name*	*Navigation*	*Usage*
Message Data Mapping	RB_CLAF_MAP	Set Up CRM, Common Definitions, Process Automation, Message Mapping, Message Data Mapping	Map source fields to destination fields in PeopleSoft CRM.

Mapping Message Data to PeopleSoft CRM Records and Fields

Access the Message Data Mapping page (Set Up CRM, Common Definitions, Process Automation, Message Mapping, Message Data Mapping).



Message Data Mapping page

Note. You can define message mapping for message with single-level hierarchy only.

Message Name Displays the message against which you want to perform data mapping.

Record To Update Enter the record that needs to be updated upon receiving the message into the PeopleSoft CRM system.

Fields to Update

Record Field to Update and **XML Tag Name**	Select the fields to update along with the corresponding XML tags from the message that you plan to receive. The system updates the record fields with the value of the XML tag element from the received message.

Record Identification

Record Field Name and **XML Tag Name**	Select a record field and corresponding XML tag. This criteria identifies the rows that must be updated when PeopleSoft CRM receives the message from another system. The system uses these fields to construct the *where* condition depending on the record fields and values of the corresponding XML tags.

Message Row Identification

XML Tag Name and **XML Tag Value**	Select the XML tags and XML tag values for the given message. This determines whether the message row qualifies with the given criteria to update the information into PeopleSoft CRM. In a message that you plan to receive, you may not want all of the rows to go to PeopleSoft CRM. Using these fields, you can sparse (filter) those rows from the received message.

Message Mapping Example

Here is an example of a message:

```
<?xml version="1.0"?>
<KP_KPI_ASMT_FACTS>
  <Fieldpiece>
    <KP_KPI_PUBL_TBL class="R">
      <BUSINESS_UNIT type="CHAR"/>
      <PF_SCENARIO_ID type="CHAR"/>
      <FISCAL_YEAR type="NUMBER"/>
      <ACCOUNTING_PERIOD type="NUMBER"/>
      <KPI_ID type="CHAR"/>
      <OBJ_ID type="CHAR"/>
      <TRGT_RULE_TYPE type="CHAR"/>
      <PF_OBJECT_TYPE type="CHAR"/>
      <RESOLVED_VALUE type="NUMBER"/>
      <ASSESS_ID type="CHAR"/>
      <ASSESS_IMAGE_ID type="CHAR"/>
      <ASSESS_DESCR type="CHAR"/>
      <PERIOD_END_DT type="DATE"/>
      <PCT_OF_TARGET type="NUMBER"/>
      <STRETCH_GOAL type="NUMBER"/>
      <CURRENT_TARGET type="NUMBER"/>
      <CURRENCY_CD type="CHAR"/>
      <RESOLVED_IND type="CHAR"/>
      <KPI_CALCDTTM type="DATETIME"/>
      <KP_TREND_IND type="CHAR"/>
      <QTD_VALUE type="NUMBER"/>
      <YTD_VALUE type="NUMBER"/>
      <YEAR_OVER_YEAR_PCT type="NUMBER"/>
      <MONITOR_ONLY type="CHAR"/>
      <DESCR type="CHAR"/>
      <KP_USER_FLD1 type="CHAR"/>
      <KP_USER_FLD2 type="CHAR"/>
      <PS_OWNER type="CHAR"/>
    </KP_KPI_PUBL_TBL>
    <PSCAMA class="R">
      <LANGUAGE_CD type="CHAR"/>
      <AUDIT_ACTN type="CHAR"/>
      <BASE_LANGUAGE_CD type="CHAR"/>
      <MSG_SEQ_FLG type="CHAR"/>
      <PROCESS_INSTANCE type="NUMBER"/>
      <PUBLISH_RULE_ID type="CHAR"/>
      <MSGNODENAME type="CHAR"/>
    </PSCAMA>
  </FieldTypes>
  <MsgData>
    <Transaction>
      <KP_KPI_PUBL_TBL class="R">
        <BUSINESS_UNIT>FSI01</BUSINESS_UNIT>
        <PF_SCENARIO_ID>1</PF_SCENARIO_ID>
        <FISCAL_YEAR>1998</FISCAL_YEAR>
        <ACCOUNTING_PERIOD>1</ACCOUNTING_PERIOD>
        <KPI_ID>1</KPI_ID>
        <OBJ_ID>200022</OBJ_ID>
        <TRGT_RULE_TYPE/>
        <PF_OBJECT_TYPE>CUSTMASTER</PF_OBJECT_TYPE>
        <RESOLVED_VALUE>11</RESOLVED_VALUE>
        <ASSESS_ID>11</ASSESS_ID>
        <ASSESS_IMAGE_ID>PS_COMPANY_ICN</ASSESS_IMAGE_ID>
        <ASSESS_DESCR>Green</ASSESS_DESCR>
        <PERIOD_END_DT/>
        <PCT_OF_TARGET>11</PCT_OF_TARGET>
        <STRETCH_GOAL>0</STRETCH_GOAL>
        <CURRENT_TARGET>0</CURRENT_TARGET>
        <CURRENCY_CD>USD</CURRENCY_CD>
        <RESOLVED_IND/>
```



```
        <KPI_CALCDTTM/>
        <KP_TREND_IND/>
        <QTD_VALUE>4670</QTD_VALUE>
        <YTD_VALUE>4670</YTD_VALUE>
        <YEAR_OVER_YEAR_PCT>0</YEAR_OVER_YEAR_PCT>
        <MONITOR_ONLY/>
        <DESCR/>
        <KP_USER_FLD1>KPI</KP_USER_FLD1>
        <KP_USER_FLD2/>
        <PS_OWNER/>
      </KP_KPI_PUBL_TBL>
      <PSCAMA class="R">
        <LANGUAGE_CD>ENG</LANGUAGE_CD>
        <AUDIT_ACTN/>
        <BASE_LANGUAGE_CD>ENG</BASE_LANGUAGE_CD>
        <MSG_SEQ_FLG/>
        <PROCESS_INSTANCE>0</PROCESS_INSTANCE>
        <PUBLISH_RULE_ID/>
        <MSGNODENAME/>
      </PSCAMA>
    </Transaction>
  </MsgData>
</KP_KPI_ASMT_FACTS>
```


From this message and the mapping that is provided, you can determine the:

- Message name - KP_KPI_ASMT_FACTS
- Record to update

  This message updates the BC table.
- Fields to update

  The BC table fields ASSESS_DESCR, ASSESS_ID, ASSESS_IMAGE_ID, KPI_ID, and PCT_OF_TARGET are updated with the values of XML tags <ASSESS_DESCR>, <ASSESS_ID>, <ASSESS_IMAGE_ID>, <KPI_ID>, and <PCT_OF_TARGET> in the message.
- Record identification

  Subscription code updates the row in the BC table if the CUST_ID field value equals the value of the XML tag <OBJ_ID> in the message.
- Message row identification

  Message rows qualify if the value of the XML tag <PF_OBJECT_TYPE> is equal to *CUSTOMERMASTER*; otherwise, the message rows are ignored.

Chapter 18

Importing Data into PeopleSoft CRM

This chapter provides an overview of the Data Import Application Engine (AE) process (RBIMPORT) and discusses how to:

- Set up data import global settings.
- Define data import templates.
- Edit matching SQL.
- Run the Data Import process.
- View the Data Import process status.
- Run the Basics Data AE process.

Understanding the Data Import Application Engine Process (RBIMPORT)

This section lists prerequisites and discusses:

- Data Import process steps.
- Matching SQL.
- When to use the Basics Data AE process to load basic data.

Prerequisites

Before you import data into PeopleSoft Customer Relationship Management (PeopleSoft CRM), ensure that:

- The input file is sorted in key field order. For example, when you import multiple contacts to the same company, you must sort the input file on the *Company* field. This prevents duplicate BO_IDs from being assigned to the same company when all the matching criteria you specified are not met.
- The PeopleSoft super user ID has CREATE TABLE privileges for dynamic table creates.
- You define the FTP server so that it can store import file attachments.

  To do this, modify the RB_IMP_ATTACH URL identifier by using the URLs - URL Maintenance page in PeopleTools.

  See *PeopleTools 8.52: System and Server Administration PeopleBook*

- You define data import global settings.

Data Import Process Steps

The Data Import process enables you to:

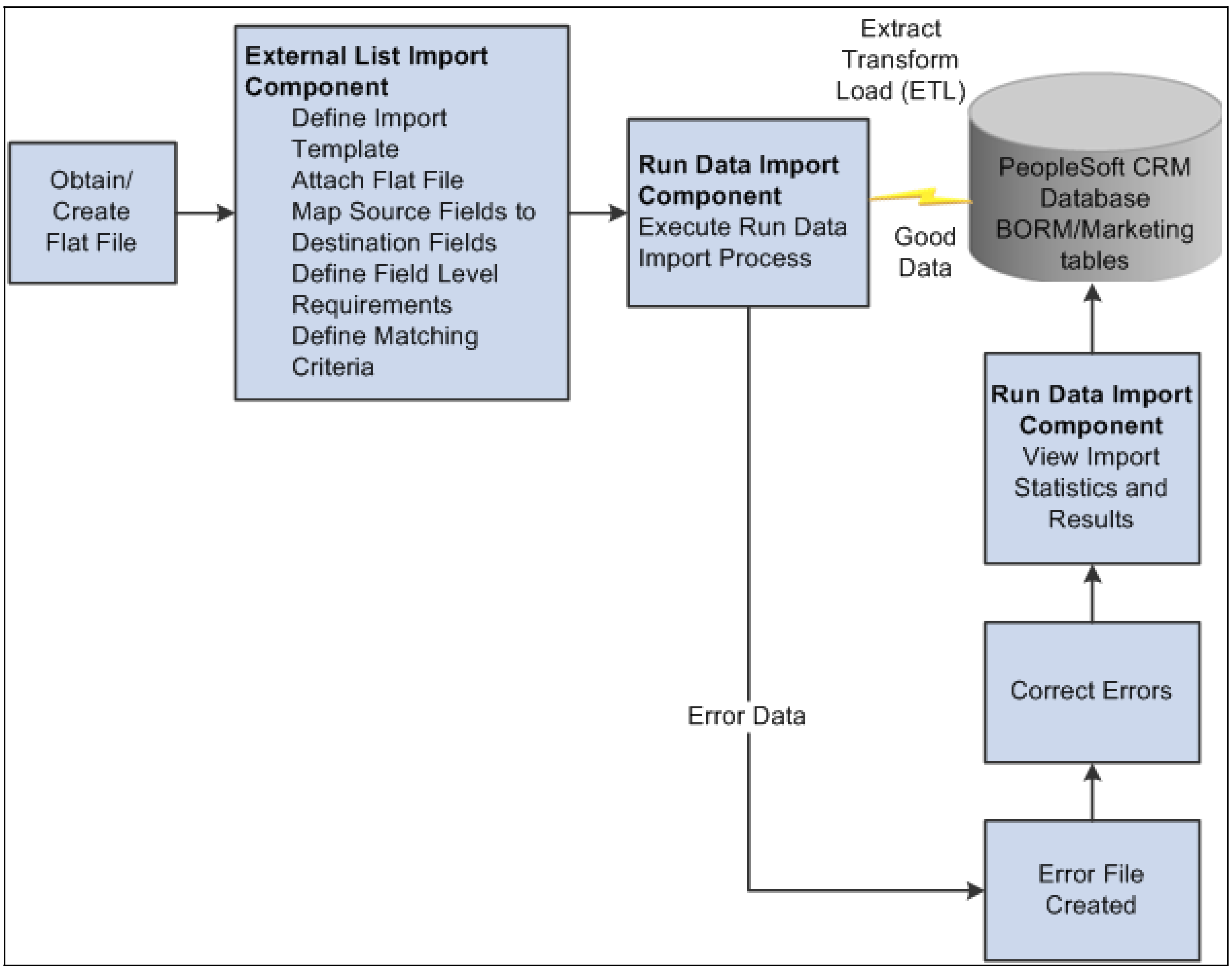
- Batch-load external data from other systems (in flat file format) into the PeopleSoft CRM database.

  You do this mainly to load companies, contacts, and consumers. You also can generate marketing lists from the data that you load.

- Update existing individual and organization records with profile data for better targeting and personalization of marketing efforts.

Note. You cannot import profile fields of the *Text Block* data type, although you can import other fields in records that contain text block fields.

This diagram shows the steps of the data import process.



Data Import process flowchart

To import data into PeopleSoft CRM:

1. Create a flat file with an accepted delimiter (tab, comma, or semicolon) for the import.

   Data import accepts flat files with rows that have a blank address, phone number, and email address.

2. Define an import template that uses the flat file.

   The import template must specify:

   - Identifying information, such as the template name, role of the imported data, import file fields, import file name, and optionally, audience.

   - Specifications for mapping between input fields and database fields.

   - Matching criteria, or the criteria for determining whether the imported data matches existing database information.

3. (Optional) Validate the import template.

   You can validate the template setup against the data file contents by running the Data Import process with the File Validation Only check box selected.

   The file validation step checks the file contents and structure and writes errors to an error file. You can use this file to correct any problems prior to importing data. Examples of validations are length of fields in the import file compared to field lengths that are in the database, compatibility of data types, and number of delimiters in each row.

4. Run the import process.

   You use the Data Import page to identify the import file, schedule the run, and specify import parameters.

5. View the status of the import process.

   On the View Import Status page, you can view import dates, times, and statuses.

6. View import results including statistics on the number of inserted, matched, updated, and in-error import rows.

7. Correct data errors that prevent records from successfully loading and run the Data Import process again.

Matching SQL

When the Data Import process runs, it dynamically builds SQL statements that match input files with database fields, based on the matching criteria that you enter. These statements are stored in the stage and matching tables. When you schedule the Data Import process, you can choose to keep these tables and later fine-tune the generated SQL to improve data import performance.

Important! You should perform this function only with the assistance of qualified consultants.

One bad change may render the whole Data Import process nonfunctional.

See Also

Chapter 2, "Understanding Business Object Relationship Model Components," Business Object Relationship Modelling, page 7

When to Use the Basics AE Process to Load Basic Data

The Data Import process automatically updates the basic data tables if you have selected the Process Basic Data Summary option on the CDM System Options page. However, situations might arise when you cannot use the Data Import process, for example:

- During initial data load.
- When you enable a new role or relationship.
- If you are updating the BORM from legacy systems and choose not to use the PeopleSoft-provided APIs.

In these cases, you must use the Basic Data Load Application Engine process (BO_BASICS) to update basic data.

See Also

Chapter 2, "Understanding Business Object Relationship Model Components," page 7

Setting Up Data Import Global Settings

To set up data import global settings, use the Data Import Global Settings (RB_IMP_GLB_SETUP) component.

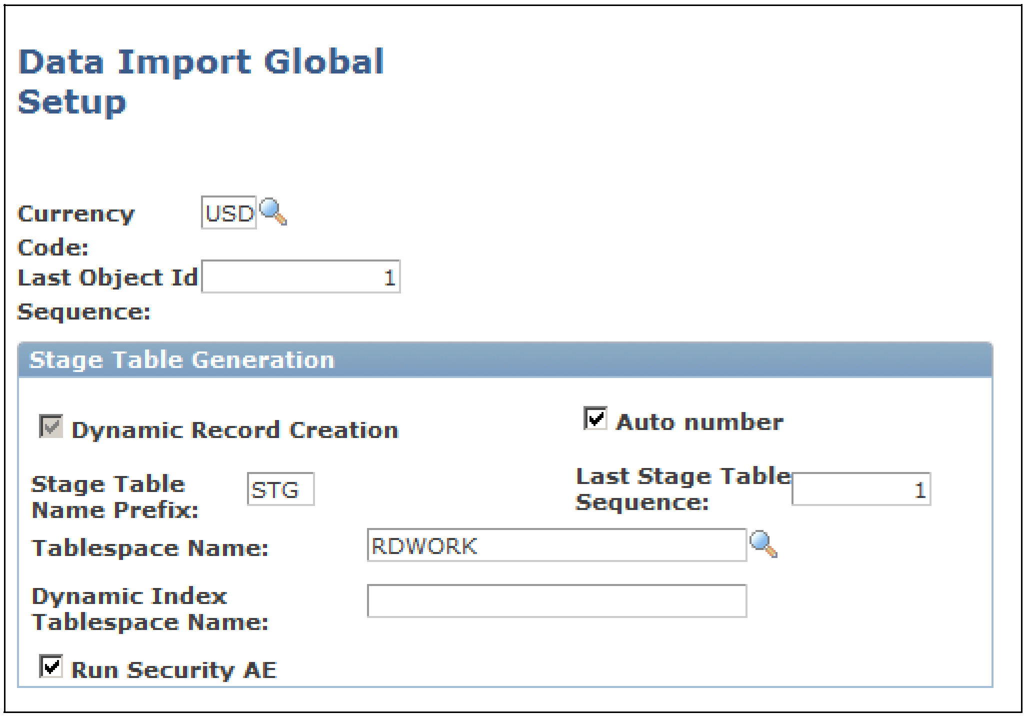
This section discusses how to define data import global settings.

Page Used to Set Up Data Import Global Settings

Page Name	*Definition Name*	*Navigation*	*Usage*
Data Import Global Setup	RB_IMP_GLB_PG	Customers CRM, Data Import, Data Import Global Settings, Data Import Global Setup	Define global settings that are for the Data Import process.

Defining Data Import Global Settings

Access the Data Import Global Setup page (Customers CRM, Data Import, Data Import Global Settings, Data Import Global Setup).



Data Import Global Setup page

Currency Code

Enter the default currency code, which the Data Import process uses for target tables that require a currency code.

Last Object Id Sequence

Enter a starting integer. Use this field when you create object IDs that are not system-generated. The format of generated IDs is *sequence number*:*counter*. For example, if the starting sequence number is 1, and you import a file with 100 companies, the format of the generated IDs is 1:1 through 1:100. A subsequent load of 50 company objects generates IDs 2:1 through 2:50.

Stage Table Generation

Dynamic Record Creation

Indicates that tables are dynamically created during the Data Import process, which executes many CREATE TABLE statements during processing. This is necessary to stage the imported data and to perform matching logic. You cannot edit this field.

Note. The PeopleSoft super user ID must have Create Table privileges for the process to finish successfully.

Auto number

Select to enable automatic number generation for imported data.

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

Stage Table Name Prefix	Enter the prefix for the staging tables. The staging tables are defined as *prefix_numeric value* (for example, STG_215). The system assigns numeric values in sequential order.
Last Stage Table Sequence	Enter a new sequence number, or leave the default, which is the last stage table sequence that the system creates. The system automatically assigns table sequences during the Data Import process. If you enter a new number, the system uses that number as its starting point in the process.
Tablespace Name	Enter the tablespace name under which you want the system to create the staging tables. PeopleSoft CRM provides the predefined table space name (RDWORK). **Note.** When performing the Data Import process on an Oracle or DB2 platform, you must define a SQL space name.
Dynamic Index Tablespace Name	Select *PSINDEX* for Oracle databases and *PSSGIXPT* for DB2. Tablespace fields are enabled for DB2 and Oracle databases only. **Note.** If you need to specify a different tablespace, you must manually enter it in Query Analyzer.
Run Security AE(Run Security Application Engine)	Select this check box to run the security AE process against imported data. If this is not selected, imported data will not be available for applications that use application security. **Note.** You can run the security AE against the entire database at a later time to make this data available.

Defining Data Import Templates

To define data import templates, use the Data Import (RB_IMP_DATA_CONFSR_GBL) component.

This section discusses how to:

- Access data import templates.
- Define data import templates.
- Define import files.
- Map source fields to target fields.
- Specify concatenation.
- Define matching criteria.
- Verify template creation.

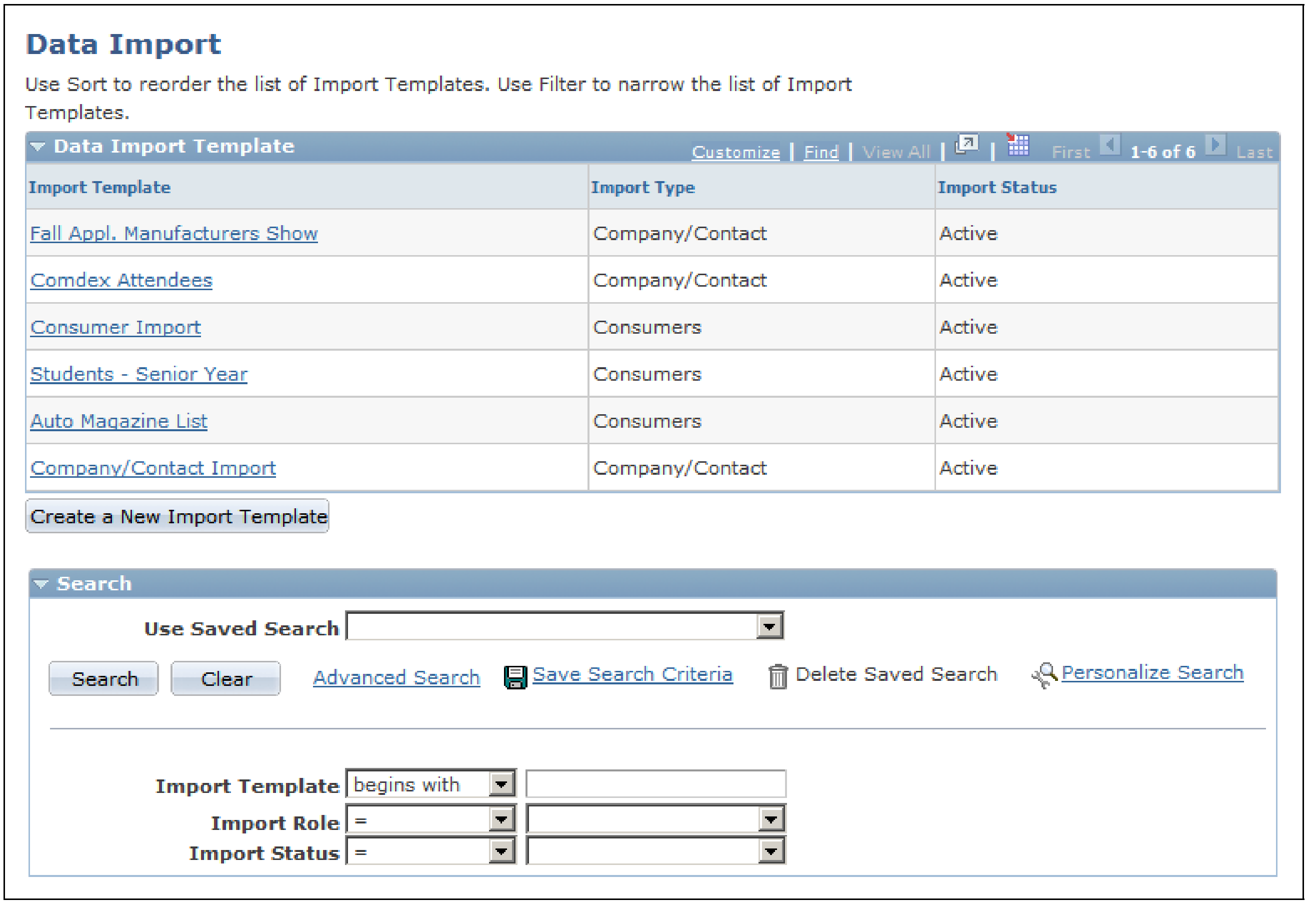
Pages Used to Define Data Import Templates

Page Name	***Definition Name***	***Navigation***	***Usage***
Data Import	RB_IMP_DATA_CONFSR	Customers CRM, Data Import, Data Import Templates, Data Import	Access a data import template to modify or add a new template.
Data Import - Step 1: Define Import Template	RB_IMP_HEADER	• Click the Create a New Import Template button on the Data Import Template Search page. • Select an existing template on the Data Import Template Search page. • Click the Go Back to Import Definition button on the Save Confirmation page. • Customers CRM, Data Import, Run Data Import, Run Data Import Search Click the View Import Definition link on the Run Data Import page.	Define general information and the role with which the imported data is associated. The role determines the target field tree that appears at mapping time.
Audiences - Audience Details	RA_LIST_MAIN	 Click the Transfer to Audience button on the Data Import - Step 1: Define Import Template page.	Describe the audience for the imported data. For use in PeopleSoft Marketing, you must specify an audience of type *Internal using Import.* See and *PeopleSoft CRM 9.1 Marketing Applications PeopleBook*, "Using Audiences," Creating and Managing Audiences.
Data Import - Step 2: Define Import File	RB_IMP_FILESPEC	Click the Next button on the Data Import - Step 1: Define Import Template page.	Associate the flat file of data and load the header fields from the flat file to the import template. Optionally, assign user-friendly labels to the header fields.

Page Name	***Definition Name***	***Navigation***	***Usage***
Data Import - Step 3: Mapping	RB_IMPORT_MAP	Click the Next button on the Data Import - Step 2: Define Import File page.	Map the source fields that are contained in the flat file to the target fields in the PeopleSoft CRM database and define the field requirements.
Data Import - Select Target Field	RB_SEL_MAP_IN_FLD	Click the Select Target link next to a Field Label on the Data Import - Step 3: Mapping page.	View the target fields in a tree format to assist with target field selection in the mapping process.
Specify Concatenation	RB_MAP_CONCAT	Select a mapping action of Concatenate in the Advanced region of the Data Import - Step 3: Mapping page and click the Specify Concatenation link.	Specify the fields and values that are concatenated to form the target field.
Data Import - Step 4: Matching	RB_IMP_MATCH_ADV	Click the Next button on the Data Import - Step 3: Mapping page.	Define the matching rules for the import data. For example, define which existing field or set of fields in the PeopleSoft CRM database you want to specify as constituting a match for an individual or organization record.
Matching Secondary Page - Select Target Field page	RB MATCH SEL FLD	Click a link in the Select Target column on the Data Import - Step 4: Matching page.	Select the database field where the import field is stored.
Save Confirmation	RB_IMP_CONF_PG	Click the Save Import Template button on the Data Import - Step 4: Matching page.	Verify import template creation.

Accessing Data Import Templates

Access the Data Import page (Customers CRM, Data Import, Data Import Templates, Data Import).



Data Import page

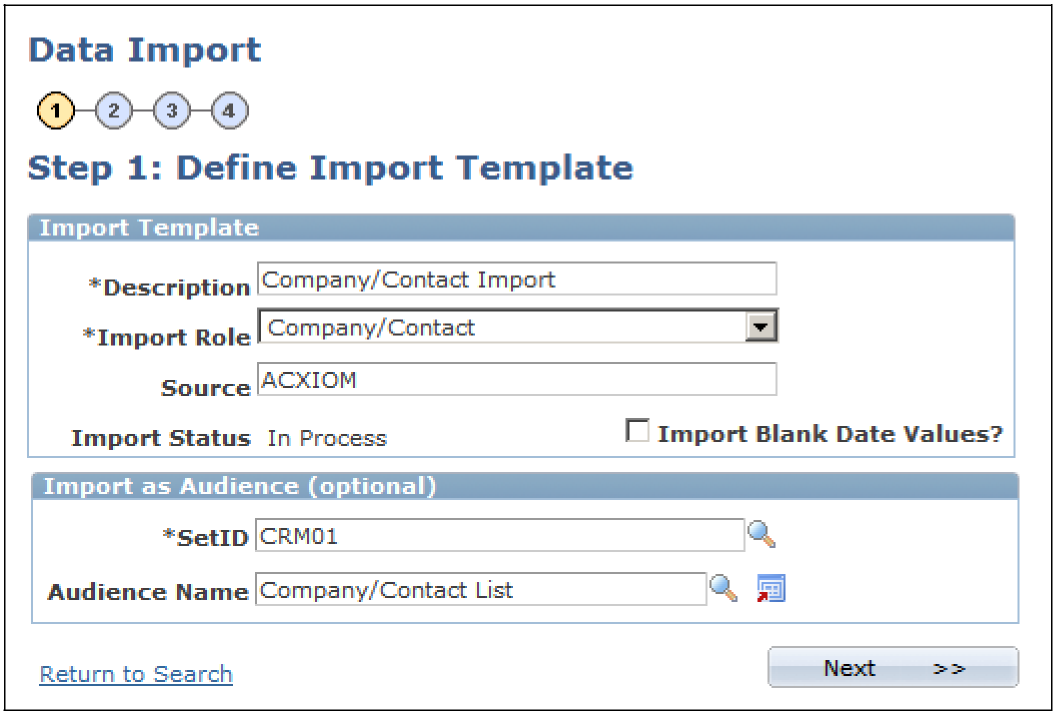
The appearance, behavior, and personalization options for this page are controlled by the search definition for the Data Import Template component.

Create a New Import Template

Click to access the Data Import - Step 1: Define Import Template page and create a new import template.

Defining Data Import Templates

Access the Data Import - Step 1: Define Import Template page (click the Create a New Import Template button on the Data Import Template Search page).



Data Import - Step 1: Define Import Template page

Import Role

Select the role to associate with the import template. All records that are in the file are imported into the CRM database with the selected role. Values are:

- *Company:* Select for company or partner company records including sites for the company.

  You must import sites in the context of a company by using the *Company* template.

- *Company/Contact:* Select for individual records for persons who function as contacts for companies.

- *Consumers:* Select for persons who do not function as contacts for companies.

Note. The role that you select here determines the objects to which you can map. For example, if you select *Consumer*, the only fields that are available to map to are those that are defined for the Consumer role.

Source

Enter the source of the information that is contained in the flat file. This field is associated with the template and not with individual records that are in the file. To associate a source with each record, create a text profile field that is called Source and use the Data Import - Step 3: Mapping page to map a constant value into the field.

Import Status Displays the import status that the system assigns when you begin to create an import template. Initially, the status is *In Process.* It stays as such until you complete the steps to define an import template, at which time it changes to *Active.*

Next Click to access the Data Import - Step 2: Define Import File page and proceed to the next page in the import definition process.

Import as Audience

You can create audiences only for import data with the *Consumer* or *Company/Contact* role types.

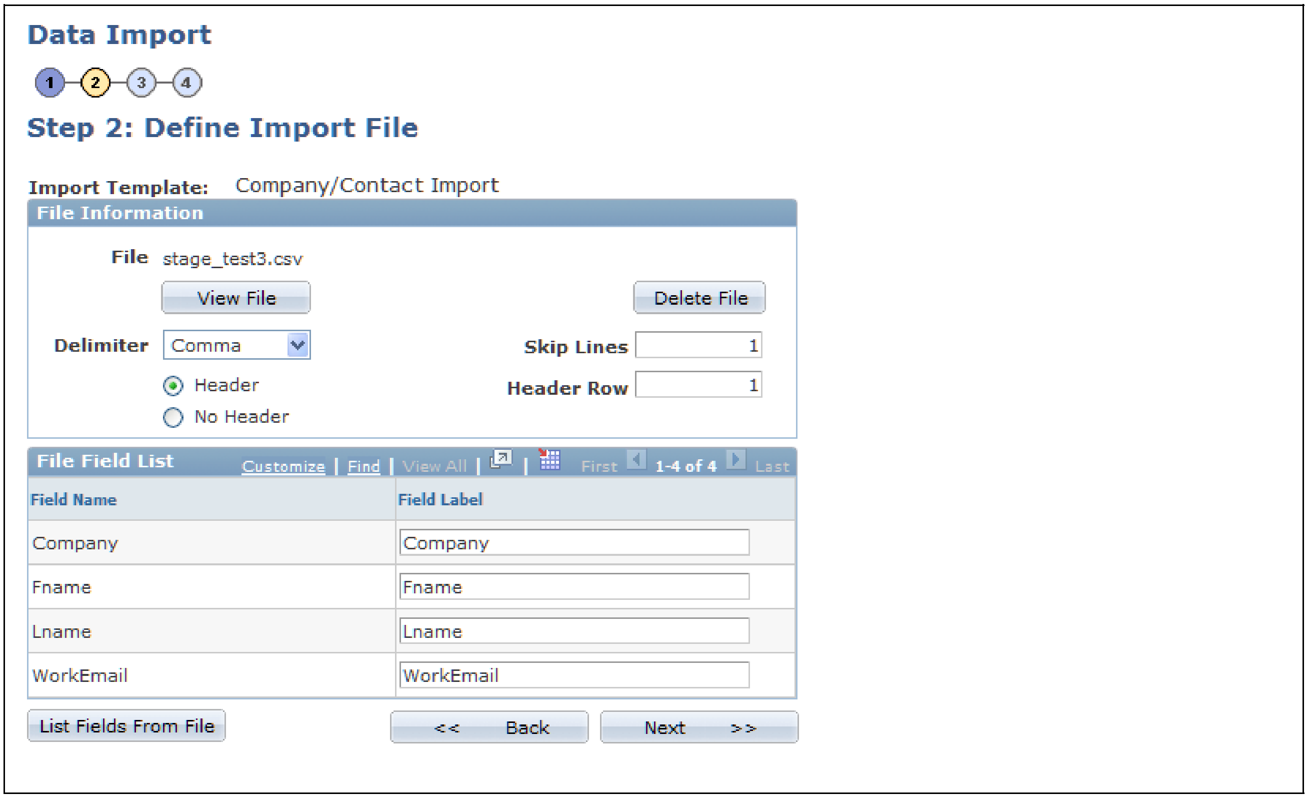
The Data Import process imports only contact methods with the type of *Home* when creating audiences with the *Consumer* role. Other contact method types, such as *Business,* are ignored. This conforms to the requirements of the Marketing product.

Audience Name Select an existing audience or click the Transfer to Audience button to define a new audience. The selected audience must have source of *Internal Using Import*and a status of either *In Design* or *Designed* to import the data into the PeopleSoft CRM database as a discrete audience.

If you import the records as an *Internal Using Import* audience, you can use the audience immediately after import. However, you can't further segment the audience in the Audience Builder. If you want to do further segmentation rather than create an audience at the time of import, create a text profile field called Audience Source, and use the Mapping step to map a constant value in that field for all records. After import, create an internal audience by using the Audience Builder with the first condition *all records that are equal to the constant value that is mapped into the profile field called Audience Source.*

Defining Import Files

Access the Data Import - Step 2: Define Import File page (click the Next button on the Data Import - Step 1: Define Import Template page).



Data Import - Step 2: Define Import File page

On initial access to this page when you are defining a new template, the Attach File button is available; the rest of the fields are empty. The Delete File and View File buttons are not available until you attach a file.

Attach File and **View File**

Click to browse for and upload a file that contains import data.

The Attach File button appears when you first access the page to define a new template; after you upload a file, the button text changes to View File.

Delete File

Click to delete the attached file.

Delimiter

Select the flat file delimiter *Comma,Semicolon,* or *Tab.*

Header and **No Header**

Select to indicate the presence or absence of a header row in the flat file.

Header Row

Enter the header row location in the field. If you do not enter a header row number, the system supplies *1* as the default.

Skip Lines

Enter the number of blank rows in the flat file.

List Fields From File

Click to list the field names and labels from the flat file.

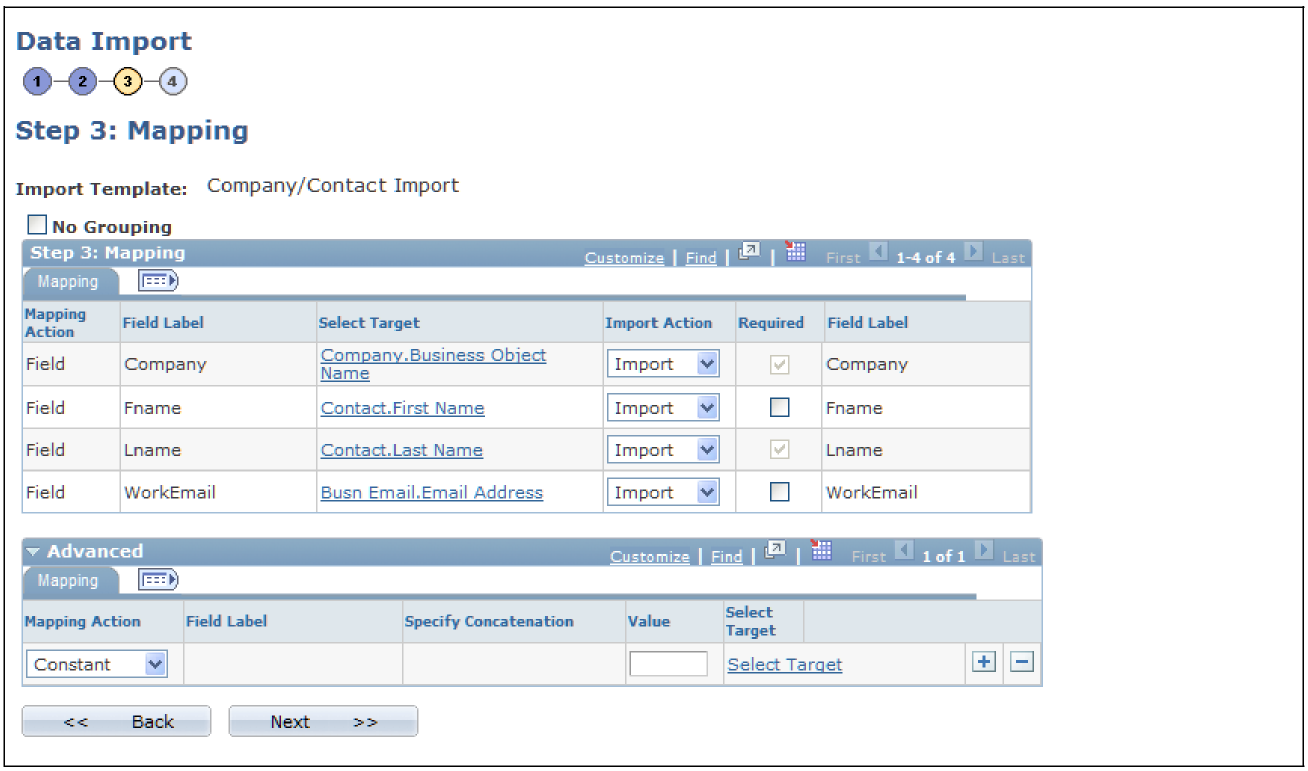
If the flat file contains a header row, the system populates the Field Name column with the exact names of the fields (for example, lname and fname) that are contained in the header row of the flat file's header row. The system also populates the Field Label fields with the same information as shown in the field name fields.

If the flat file doesn't contain a header row, the system populates these columns with *FIELD1, FIELD2,* and so on until all of the flat file fields are represented.

Change the field labels to represent the names of the flat file fields in a more meaningful and understandable way. For example, you might change the *lname* field label to *Last Name.*

Mapping Source Fields to Target Fields

Access the Data Import - Step 3: Mapping page (click the Next button on the Data Import - Step 2: Define Import File page).



Data Import - Step 3: Mapping page

When you access this page, the source field labels appear in the Step 3: Mapping scroll area, and the Advanced scroll area is collapsed.

You must map at least one source field from the flat file to a target field in the CRM database and you must map all required fields (required fields have an asterisk at the end of the field name in the folder tree view).

If you can perform one-to-one mapping of the source fields to the target fields, use the Mapping scroll area only.

To use a default constant in a target field, concatenate source fields into one target field, or enter a source field into multiple target fields, use both the Mapping and Advanced scroll areas.

No Grouping

To give you more control over what fields Data Import considers unique when two or more continuous rows have the same data, PeopleSoft CRM added the No Grouping check box.

For example, assume that you are importing the following data:

FIRST NAME	LAST NAME	EMPLID
Joe	Smith	123
Joe	Smith	124

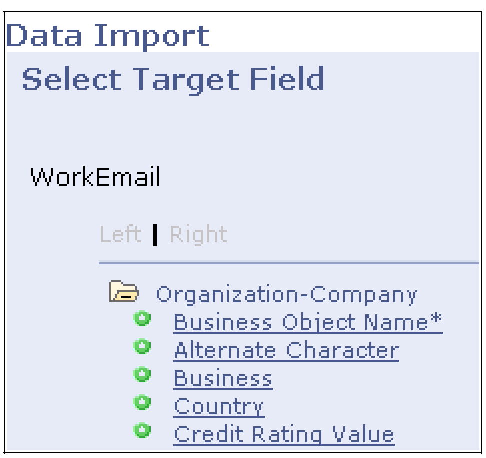
Data Import considers First Name and Last Name unique, and therefore inserts only one row and updates the EMPLID to 124. If you, however, select the No Grouping check box, the system inserts or matches on every row.

Selecting Target Fields

Select Target Click to select the database field that is updated by the input field or by an advanced mapping action.

When you click this link, a hierarchical tree structure appears with required fields marked by an asterisk (*). The hierarchy differs depending on the role that you selected for the import template. Required fields are at each folder level. If any field in the folder is mapped, then you must map the required fields in that folder and in the folders above it. The required fields provide the concatenated key to the target fields.

In the following example, the import role is *Company* and the source file field is *Work Email*. The *Business Object Name* field in the *Organization - Company* folder is required.



Data Import - Select Target Field page (1 of 2)

An intermediate level in the hierarchy, *Contact*, is not shown. The Lname field in the *Contact* folder is required and selected. The target field, Email Address, is defined in the lowest level folder,*Business Email-Contact.*

Data Import - Select Target Field page (2 of 2)

Mapping Source Fields to Target Fields

To map the source flat file fields to target fields, use the Step 3: Mapping region. Select a target for each field on the import file.

Ignore

Select to ignore this field and not import it when you perform the import process. This is useful for when you reuse import templates and want to import only a subset of the premapped fields.

Import

Select to import this field when you perform the import process.

Advanced Mapping Actions

The advanced mapping actions enable you to update database records when a one-to-one correspondence does not exist between database fields and fields in the import file.

Mapping Action

Select one of the following values:

- *Concatenate*

  Select to concatenate two or more fields or values to form the target field.

- *Constant*
- *Field*

  Select to map an already-mapped field from the import file to another target field.

Value

Enter the constant value with which to populate the target field. For example, if *Country* is a field in the database, and all input records are for *France,* you would enter a value of *FRA.*

This field appears only if you select a mapping action of *Value.*

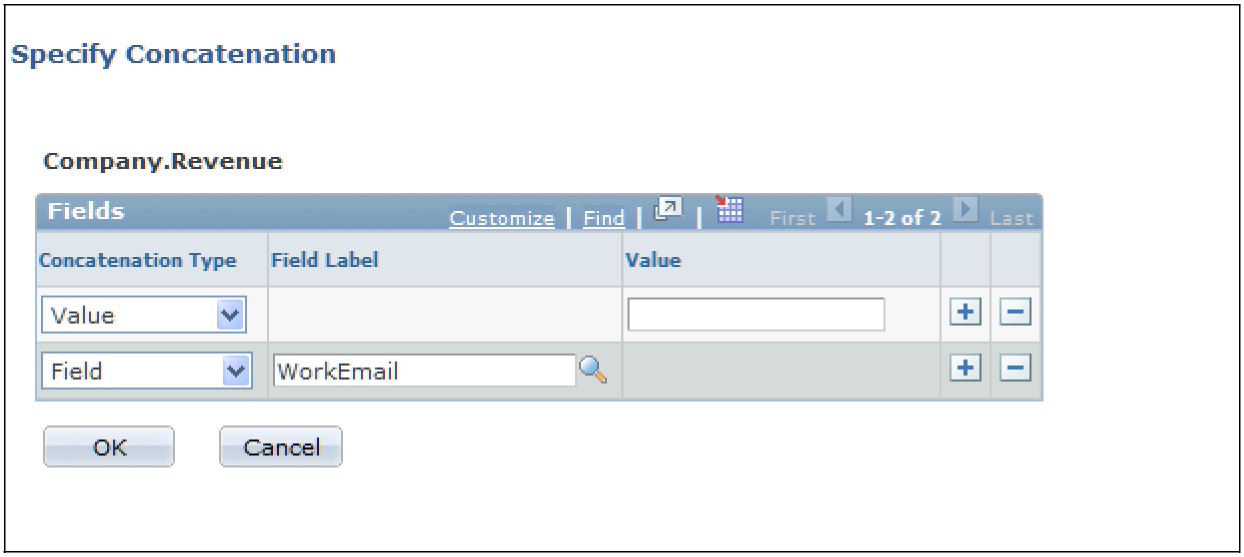
To enter data, time, or date values, consult PeopleTools PeopleBooks to determine the correct formats.

Specify Concatenation Click to access the Specify Concatenation page, where you can select the fields and values that are concatenated to form the target field.

Field Label Select the field to be map to the target field from the available choices.

Specifying Concatenation

Access the Specify Concatenation page (select a Mapping Action of Concatenate in the Advanced region of the Data Import - Step 3: Mapping page and click the Specify Concatenation link).

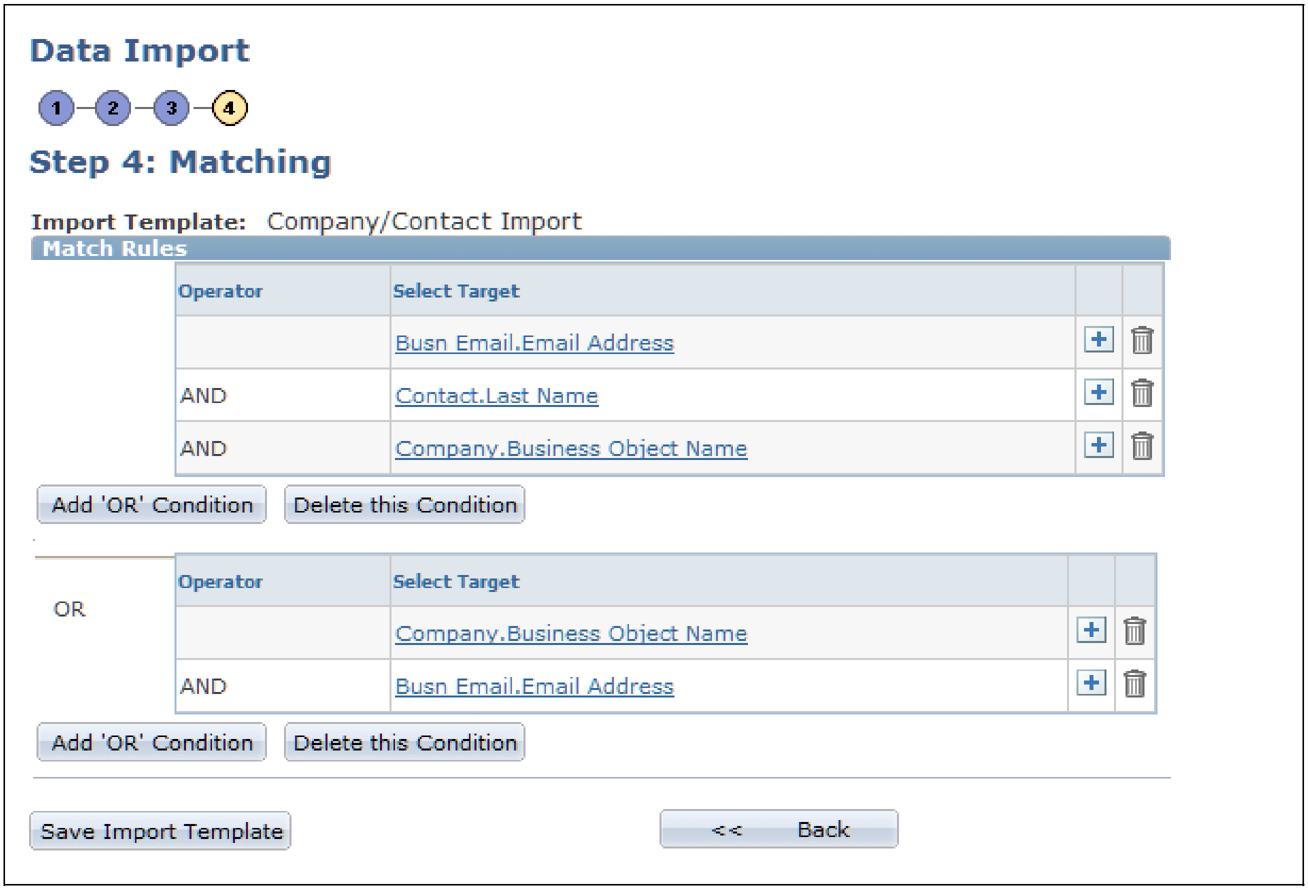


Specify Concatenation page

Concatenation Type Select *Value* to specify a constant in the Value column and *Field* to select from the import field labels in the Field Label list.

Defining Matching Criteria

Access the Data Import - Step 4: Matching page (click the Next button on the Data Import - Step 3: Mapping page).



Data Import - Step 4: Matching page

This page enables you to specify the database fields that must match fields in the import file to update the database from the import file. If no match is found, the system inserts the incoming row as a new record in the CRM database. If a match is found, the system updates the existing record with new information from the file. You can override the update by deselecting the Update Matched Records check box when running the import process. In that case only, the system writes matched records to the error file.

New data never overwrites or updates an existing record's contact method fields (phone, email, and address); the new fields are appended as additional contact methods. All other types of mapped fields are updated or overwritten by the new data for matched records.

Warning! All fields, including email address, are case-sensitive for matching. To avoid instances in which a match is not found due to case-sensitivity, you should convert fields such as email address to lowercase prior to import. For example, convert Joe_Smith@ABC.com to joe_smith@abc.com before importing the file.

Matching Logic

Each template's matching criteria consists of one or more OR conditions, each of which contains an AND condition or a single field that must match. For example, in the condition shown, either all three of the fields, Busn_Email.Email Address,Contact.Last Name, and Company.Business_Object_Name must match their corresponding database fields or both of the fields Company.Business_Object_Name and Busn_Email.Email Address must match the database fields.

Note. You cannot nest conditions.

Add 'OR' Condition Click to add an OR condition to the statement.

Note. You might see matching statements with conditions that are separated or nested using parentheses. These statements were developed in a previous version of PeopleSoft CRM. For upward compatibility, these statements act the same as they did in previous versions. However, if you make any changes to the statement, you must enter it in the new format

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Verifying Template Creation

Access the Save Confirmation page (click the Save Import Template button on the Data Import - Step 4: Matching page).

This page displays:

- A message that indicates whether the template is saved successfully.

  The Import status is set to *Active.*

- The Run Data Import link.

  Click this link to access the Run Data Import page and immediately run the import process.

- The Go Back to Import Definition link.

  Click this link to access the Data Import - Step 1: Define Import Template page, view the existing template, and make any necessary changes.

Editing Matching SQL

To edit matching SQL, use the Edit Matching SQL (RB_IMP_MATCH_EDIT) component.

This section discusses how to:

- Select a statement for editing.
- Edit a statement.

Pages Used to Edit Matching SQL

Page Name	*Definition Name*	*Navigation*	*Usage*
Edit Matching SQL	RB_EDIT_MATCHING	Customers CRM, Data Import, Edit Matching SQL	Select a SQL statement for editing.
Edit SQL page for Data Import	RB_EDIT_SQL	Click the Edit button for any SQL statement on the Edit Matching SQL page.	Edit a SQL statement.

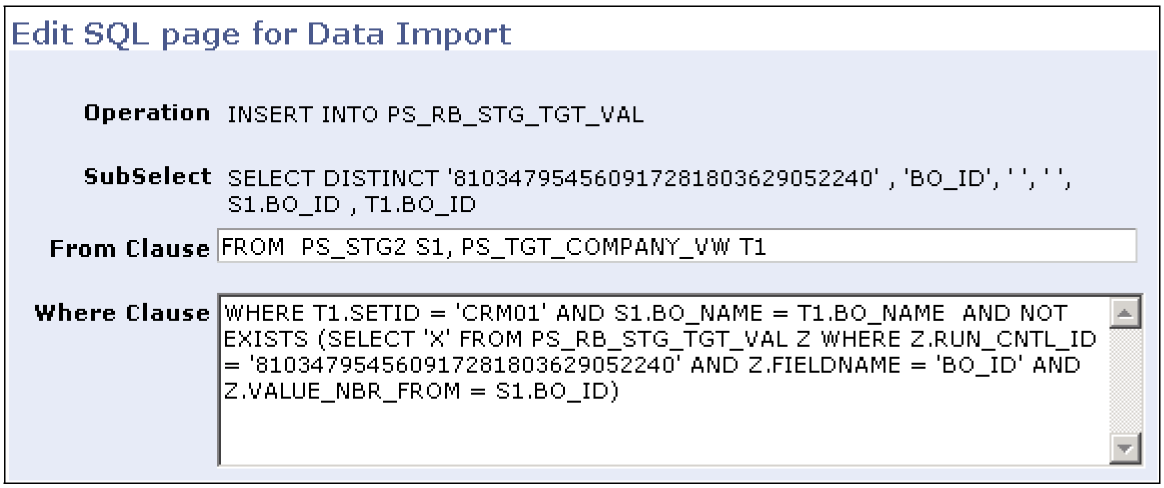
Selecting a Statement for Editing

Access the Edit Matching SQL page (Customers CRM, Data Import, Edit Matching SQL).

This page enables you to view SQL statements and their processing time from the last run of the data import template. You can select a statement and edit it.

Editing a Statement

Access the Edit SQL page for Data Import page (click the Edit button for any SQL statement on the Edit Matching SQL page).



Edit SQL page for Data Import page.

Use this page to cut and paste the SQL statement to Query Analyzer, tune it, and replace the SQL statement with the tuned statement.

For example, an administrator runs a Data Import job with the Keep Tables option selected. After the job finishes or terminates due to performance issues, the administrator can access this page to review the SQL statements to see how long each one took and start tuning those ones that took a long time.

When finished editing, the administrator saves the matching SQL and can rerun the same Data Import template.

Running the Data Import Application Engine Process (RBIMPORT)

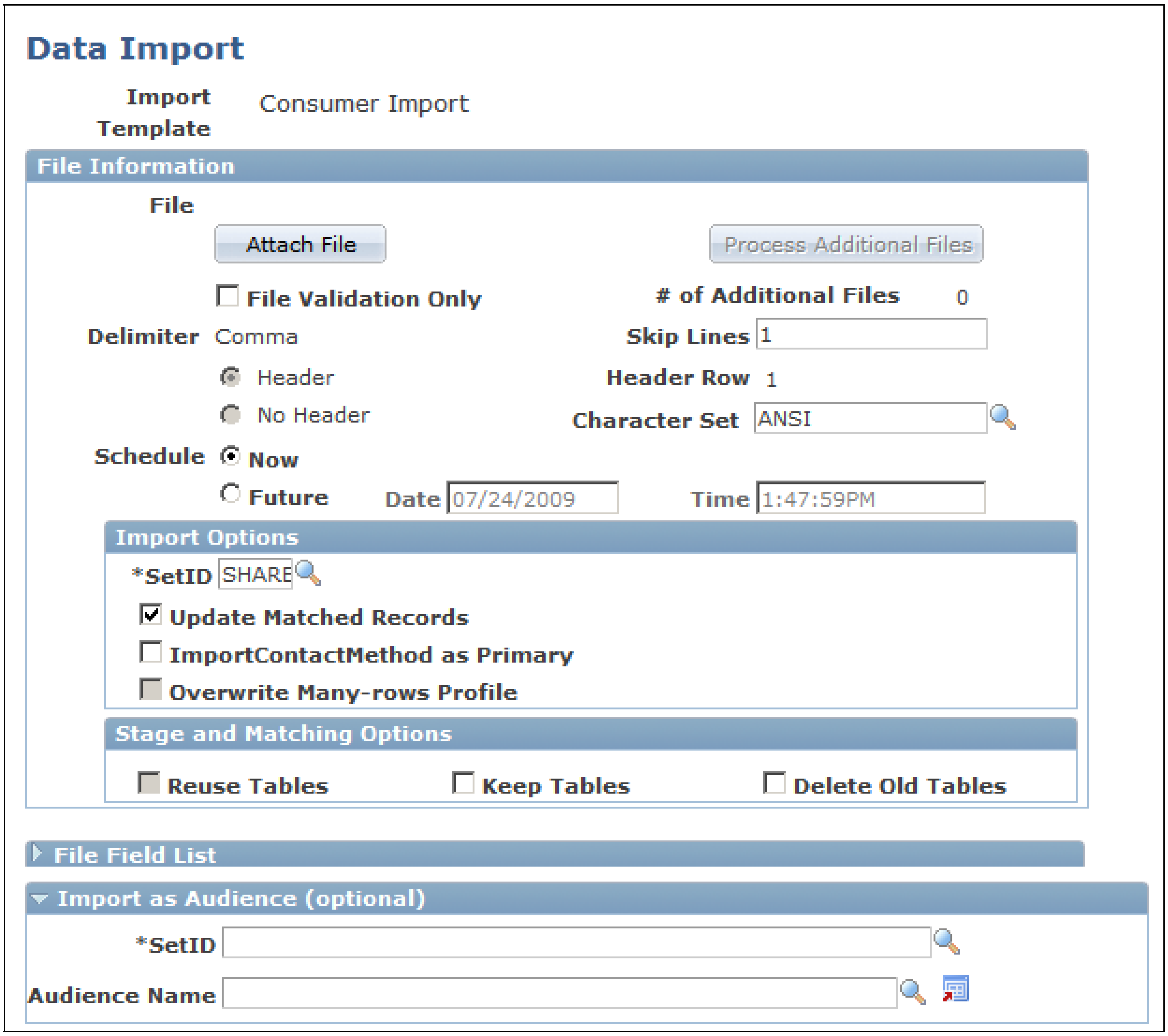
This section discusses how to run the Data Import process.

Pages Used to Run the Data Import Application Engine Process (RBIMPORT)

Page Name	*Definition Name*	*Navigation*	*Usage*
Data Import	RB_IMP_RUN_CONFSRC	Customers CRM, Data Import, Run Data Import, Data Import	Search for and view existing templates to use for the Data Import process.
Data Import	RB_IMP_RUN_DATA_PG	• Click the Save Import Template button on the Data Import - Step 4: Matching page. Click the Run Import link on the Save Confirmation page. • Select an existing template on the Run Data Import Search page and click the Import Data button.	Run the Data Import process.
Import Multiple Files	RB_IMP_MULTI_FILES	Click the Process Additional Files button on the Data Import page.	Search for and upload additional files for data import.

Running the Data Import Application Engine Process (RBIMPORT)

Access the Data Import page (Customers CRM, Data Import, Run Data Import, Data Import).



Data Import page (1 of 2)

File Information

Attach File and **View File**	Click to access a page where you can search for and upload the import file. After you attach a file, the button text changes to *View File.*
Process Additional Files	Click to upload one or more additional flat files. The system processes all attached flat files in parallel; this enables you to speed up the data import process by breaking up one large file into smaller files.

File Validation Only

Select to perform data validation tests of the Data Import process before you actually perform the process. This is a preventive step that is useful for new files from unknown vendors.

This option runs the Data Import process to validate data types that are within the file, but it doesn't perform the data update. For example, if a character string is mapped to a number field or a mapped date is not in the correct format, an error occurs. The process also checks whether mapped fields are longer than the target field. The end result is an error file that contains all of the input rows with detailed error messages so that you can make corrections.

Schedule

Select Future and enter a date and time when the Data Import process is to run, or select Now. If you enter a past date, the system runs the process immediately.

Character Set

Select the input data file type, for example, *UTF8.* All installed character sets are available for selection.

Update Matched Records

Select to specify that target data be updated with source data from the flat file when a match exists between a source record and an existing target record in the database. The rules that you set up on the Data Import - Step 4: Matching page determine the match.

If you do not select this check box, you must view the error file to see a list of the records that match but are not updated.

See and Chapter 18, "Importing Data into PeopleSoft CRM," Viewing the Status of One Data Import Process Instance, page 404.

Note. Contact method fields are never updated with imported data; instead, the new information is added to the database.

Import Contact Methods as Primary

Select to enforce that an imported contact method is checked as *Primary.* This overwrites existing primary flags in the PeopleSoft CRM database. If you do not select this check box (which is deselected by default), the system still imports all mapped contact methods, but none are flagged as *Primary.*

Every PeopleSoft CRM business object supports multiple contact methods of each type. For example, a contact or consumer who is named John Doe can have multiple business email addresses, multiple home phone numbers, and so on. However, John Doe can have only one primary home phone number.

Overwrite Many-Rows Profile

Select to overwrite existing data if multiple rows of information can exist for a business object, for example, contact methods for a customer. If this check box is not selected, the Data Import process inserts new database records with the imported data.

Reuse Tables

Select to use existing stage and matching SQL tables that were generated in a previous run of the template.

Keep Tables	Select to retain the stage tables. This option is selected and disabled by default if the Reuse Tables option is selected.
Delete Old Tables	Select to remove all previous versions of the stage and matching tables, but keep the current one. This option is selected by default if stage and matching tables exist from a previous run.
Import Data	Click to run the Data Import process and open the Import Status group box, which displays the status of the Run Data Import process and contains a View Import Statistics link.

File Field List

The File Field List region displays the fields that are associated with the import template. This enables you to verify whether the import works in the case where you access the Data Import process directly from the menu and use an existing template.

Import As Audience

The fields in this section function similarly to the identical fields on the Define Import Template page. Values that you enter override the value on the import template.

Import Status

The Import Status group box appears only after you click the Import Data button.

View Import Statistics	Click to access the View Import Statistics page. **Note.** New contacts who are imported for existing companies are reported as updates because this updates the company's contact data.

Viewing the Data Import Process Status

This section discusses how to view the status of the Data Import process. You can:

- View the status of one data import process instance.
- View import statistics.
- View the data import process error file..

Pages Used to View the Data Import Process Status

Page Name	***Definition Name***	***Navigation***	***Usage***
Data Import	RB_IMP_VIEW_CONFSR	Customers CRM, Data Import, View Import Status	View instances, or runs, of the Run Data Import process.
Data Import	RB_IMP_VIEW_STATUS	Select an instance of the Run Data Import process on the View Import Status Search page.	View the status of one instance of the Data Import process.
View Import Statistics	RB_IMP_VW_STATS	Click the View Import Statistics link on the Run Data Import page or the View Import Status page.	View import statistics.

Viewing the Status of One Data Import Process Instance

Access the Data Import page (Customers CRM, Data Import, Run Data Import, Data Import).

View File Click to view the flat file that is used for the Data Import process.

View Error File Click to download and view the error log file that the Data Import process creates. The error log contains details about the rows that are in error so that you can fix them and rerun the process. If the Update Matched Records option is not selected on the Data Import page, the error log also contains a listing of the records that match but are not updated.

View Import Statistics Click to access the View Import Statistics page and view the import statistics, number of rows inserted, updated, and matched, and the total number of records that are processed.

Viewing Import Statistics

Access the View Import Statistics page (click the View Import Statistics link on the Run Data Import page or the View Import Status page).

This page displays the import statistics from the Data Import process.

View Process Monitor Click to access the Process Monitor - Process List page and monitor the Data Import process in detail.

See *PeopleTools 8.52: PeopleSoft Process Scheduler PeopleBook*

View Error File Click to download and view the error file that the Data Import process creates. The error file contains details about the rows that are in error so that you can fix them and rerun the process, if desired.

Viewing the Data Import Process Error File

Access the error file.

The error file looks just like the input flat file except that after every row messages appear about what is wrong with the input row. Correct the problems with data on this error file and then rerun the Data Import process by using this file.

Running the Basics AE Process

This section provides an overview of the Basics AE process (BO_BASICS) and discusses how to:

- Disable unnecessary roles, relationships, and contact methods.
- Optimize the database for performance.
- Submit the Basics AE process.

Understanding the Basics AE Process

The Basics AE process reduces the complex tables and relationships contained in the BORM to two flat tables, BO_BASIC_IND (for data that is related to individuals) and BO_BASIC_ORG (for data that is related to organizations). For every customer business object that is enabled for Basics by role or relationship, the Basics AE finds all related business objects and writes the information to the relevant tables for use by the PeopleSoft Online Marketing and Marketing products.

For example, a customer company has four sites, each site has four contacts, and each contact has four contact methods. The process locates 64 (4 times 4 times 4) business objects to get contact information for the customer and organizes this information into a single BO_BASIC_IND record per role and relationship type keyed by the customer's business object identifier (BO_ID), role, and relationship ID. Rows for both the company and the site are populated in the BO_BASIC_ORG table.

On a large database, for example seven million rows, this process might run for several hours. You can significantly improve the performance of this process by enlisting the services of qualified implementation consultants or a database administrator (DBA). Working with these persons, you can tailor the Basics AE process to meet specific requirements and improve process performance.

The contact methods displayed in the Audience result grid are taken directly from the Basic Data tables. To show values for all the contact methods in the Audience result grid, Contact/Consumer contact methods must be set up to follow the corresponding mapping logic for Basic Data.

Step 1: When adding a person, you should ignore the description field, and concentrate on the Type fields. After doing that, remember that the first data entry you make by default becomes the primary contact information for all roles.

Step 2: Go to the Advanced Options section of the Address Book, and manually define the primary address, phone, and email info for each role.

Page Used to Run the Basics AE Process

Page Name	***Definition Name***	***Navigation***	***Usage***
Application Engine Request	AE_REQUEST	PeopleTools, Application Engine, Request AE, Application Engine Request	Submit the Basics AE (BO_BASICS) process.

Disabling Unnecessary Roles, Relationships, and Contact Methods

The Basics AE process dynamically reads all enabled roles, relationships, and mappings. To tailor the process for your particular requirements and improve process performance, you can disable or remove the following information:

- Basic data for roles.

  You are not required to implement all delivered roles for an installation, or copy all implemented roles to basic data. To disable a role for basic data, deselect the Enabled for Basic Data option for the role on the Role Type page.

  The roles that are enabled for basic data as delivered are:

  - Company
  - Site
  - Worker
  - Contact
  - Individual Consumer
  - Partner

- Basic data for relationships.

  You can also disable relationships for basic data if they are not used, for example, if an enterprise does not sell through the partner channel. Disable a relationship by deselecting the Enabled for Basic Data check box on the Relationship Type page. The relationships that are enabled for basic data as delivered are:

  - Primary Contact / Company
  - Contact / Company
  - Primary Contact / Partner
  - Contact / Partner

- Remove basic data mappings for contact method purposes that are not needed. You can add or clone these mappings if they are needed in the future.

  The basic data mappings are delivered with multiple contact method purpose types associated with each role and relationship. These are the contact method purpose types that are mapped as delivered, and they vary by role:

  - Phone - Business
  - Phone - FAX
  - Phone - Home
  - Email - Business
  - Email - Home
  - Address - Business
  - Address - Home

  To remove a contact method purpose from a role or relationship, display the role or relationship on the Basic Data Mappings page, scroll to the contact method purpose row, and use the Delete Row button.

Optimizing the Database for Performance

The DBA might perform some or all of the following actions:

Stripe the Disks on Which Data Resides

Striping is the process of dividing data into blocks and locating the blocks on different physical disks, which enables parallel database processing and speeds up the run.

Run SQL to Detect Problematic Data

The following data conditions can cause the Basics AE program to run inefficiently and can be detected and addressed prior to running the process:

- Duplicate primary contact methods.

  Use this sample SQL to detect duplicates in the *Phone* table. You must run the same SQL for the *Address* and *Email* tables. To do so, replace each occurrence of the table name *PS_BO_SRCH_PHN* with *PS_BO_SRCH_ADD* (for address) and *PS_BO_SRCH_EML* (for email) before running.

```
SELECT BO_ID, ROLE_TYPE_ID, BO_REL_ID, COUNT(*) FROM PS_BO_SRCH_PHN BO_CM_VW  WHERE⇒
 BO_CM_VW.ROLE_TYPE_ID IN (2, 3, 4, 8, 9, 11) AND BO_CM_VW.BO_CM_START_DT <= { fn⇒
 CURDATE() }  AND BO_CM_VW.BO_CM_END_DT > { fn CURDATE() }  AND BO_CM_VW.CM_USE_⇒
START_DT <= { fn CURDATE() }  AND BO_CM_VW.CM_USE_END_DT > { fn CURDATE() }  AND⇒
 BO_CM_VW.PRIMARY_IND = 'Y'  AND BO_CM_VW.PROFILE_CM_SEQ = (SELECT MAX(G2.PROFILE_⇒
CM_SEQ)  FROM PS_BO_SRCH_PHN G2  WHERE G2.BO_ID = BO_CM_VW.BO_ID  AND G2.BO_CM_⇒
START_DT = BO_CM_VW.BO_CM_START_DT  AND G2.CM_USE_START_DT = BO_CM_VW.CM_USE_START_⇒
DT  AND G2.CM_USE_ID = BO_CM_VW.CM_USE_ID  AND G2.ROLE_TYPE_ID = BO_CM_VW.ROLE_⇒
TYPE_ID  AND G2.BO_REL_ID = BO_CM_VW.BO_REL_ID  AND G2.BO_REL_POSITION = BO_CM_⇒
VW.BO_REL_POSITION) GROUP BY BO_ID, ROLE_TYPE_ID, BO_REL_ID HAVING COUNT(*) > 1
```

- Duplicate BO_ID in the Person table.

  Run this SQL to detect duplicates in the Person table.

```
SELECT BO_ID, COUNT(*) FROM PS_RD_PERSON GROUP BY BO_ID HAVING COUNT(*) > 1
```

Gather Runtime Statistics

The Basics AE process step *CDMXSTAT* gathers and updates runtime statistics that are used by the relational database engine to optimize queries and find free space. This provides information to the engine about the distribution of data and improves the chances of index usage. This step is recommended after large numbers of rows are inserted or tables are reorganized, or when indexes are added or removed.

The DBA can disable this step (by making it *Inactive* in Application Designer) prior to a run if the statistics are already updated.

Drop and Rebuild Indexes

Drop table indexes and re-create them manually after the Basics AE process runs successfully. This is especially helpful on *DB2UNIX* or *DB2* platforms. You can drop the indexes manually or enable the Basics AE process step *CDMXDROP* to drop indexes

This is the list of indexes to drop and re-create:

- PS0BO_BASIC_IND
- PS1BO_BASIC_IND
- PSABO_BASIC_IND
- PSBBO_BASIC_IND
- PSCBO_BASIC_IND
- PSDBO_BASIC_IND
- PSEBO_BASIC_IND
- PS0BO_BASIC_TMP1

- PS1BO_BASIC_TMP1
- PS0BO_BASIC_TMP2
- PS1BO_BASIC_TMP2
- PSABO_BASIC_ORG_TMP2
- PSABO_BASIC_ORG
- PSBBO_BASIC_ORG
- PSCBO_BASIC_ORG

Inactivate Scheduled Jobs That Can Conflict with the Basics Process

The jobs *CM_FLTM* (for 8.9 and prior releases) and *CM_MAINT* (for release 9) are regularly scheduled to synchronize the normalized BORM tables to the flattened contact method tables. This improves access to contact methods for online processing, but can cause performance issues when run concurrently with the Basics AE.

To inactivate these jobs and any others that might cause data conflicts, use the PeopleTools Schedule JobSet Definitions page located under PeopleTools, Process Scheduler. Search for the job name and select *Inactive* in the Status field. Save the job definition.

When the Basics process ends, reactivate this job.

Submitting the Basics AE Process

To submit the Basics AE process, access the Application Engine Request page and add a new run control for the *BO_BASICS* program.

See *PeopleTools 8.52: Application Engine PeopleBook*

Part 7

Customer Data Hub Integration

Chapter 19

Understanding Customer Data Hub Integration

This chapter discusses:

- Customer data management.
- Customer data hub integration.
- Integration architecture.
- Data synchronization and data mapping.
- Full data synchronization.
- Incremental data synchronization.
- Data quality management.
- Data merge.

Understanding Customer Data Management and the Customer Data Hub

Customer Data Management provides a single, accurate, complete and up-to-date view of the Customer throughout the enterprise.

A Customer Data Management solution performs various functions:

- Customer data throughout the enterprise is consolidated into a single master database.
- Customer data is kept synchronized between the master database and other individual application systems to maintain a consistent enterprise view of the Customer.
- Data is routinely cleansed and enriched in the master database, and then distributed to the individual application systems.
- Master data is leveraged to improve customer centric business processes and to achieve more accurate reporting and analytics.

The Customer Data Hub (CDH) and supporting products available in Oracle's E-Business Suite constitute Oracle's Customer Data Management solution.

The *Oracle Trading Community Architecture (TCA)* is the data model and infrastructure used to physically consolidate customer data into a master database. This customer data can be managed or new data can be created using the *Oracle Customers Online* application.

The *Oracle Customer Data Librarian* application is used to cleanse and standardize the master data. It provides process-oriented tools to identify and resolve existing duplicate data and also to prevent the introduction of duplicates into the system.

The *Oracle Customer Data Spoke* provides tools to integrate spoke applications like PeopleSoft CRM with the Customer Data Hub, and share master customer data across the enterprise in real time.

This document provides details on the CDH integration with PeopleSoft CRM.

References

Before implementing the CRM/CDH integration you should familiarize yourself with the following:

- 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 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft CRM.
- The *Oracle Customer Data Librarian Implementation Guide* describes how to implement Oracle Customer Data Librarian. As part of implementing Oracle Customer Data Librarian, you must also complete all the implementation steps for Oracle Customers Online.
- The *Oracle Customer Data Librarian User Guide* describes how to use Oracle Customer Data Librarian to establish and maintain the quality of the Trading Community Architecture Registry, focusing on consolidation, cleanliness, and completeness. Oracle Customer Data Librarian has all of the features in Oracle Customers Online, and is also part of the Oracle Customer Data Management product family.
- The *Oracle Customers Online Implementation Guide* describes how to implement Oracle Customers Online.
- The *Oracle Customers Online User Guide* describes how to use Oracle Customers Online to view, create, and maintain your customer information. Oracle Customers Online is based on Oracle Trading Community Architecture data model and functionality, and is also part of the Oracle Customer Data Management product family.
- The *Oracle Trading Community Architecture Technical Implementation Guide* explains how to use the public Oracle Trading Community Architecture application programming interfaces (APIs) and develop callouts based on Oracle Workflow Business Events System (BES). For each API, this guide provides a description of the API, the PL/SQL procedure, and the Java method, as well as a table of the parameter descriptions and validations. For each BES callout, this guide provides the name of the logical entity, its description, and the ID parameter name. Also included are setup instructions and sample code.
- The *Oracle Trading Community Architecture Administration Guide* describes how to administer and implement Oracle Trading Community Architecture (TCA). You set up, control, and manage functionality that affects data in the TCA Registry. It also describes how to set up and use Resource Manager to manage resources.

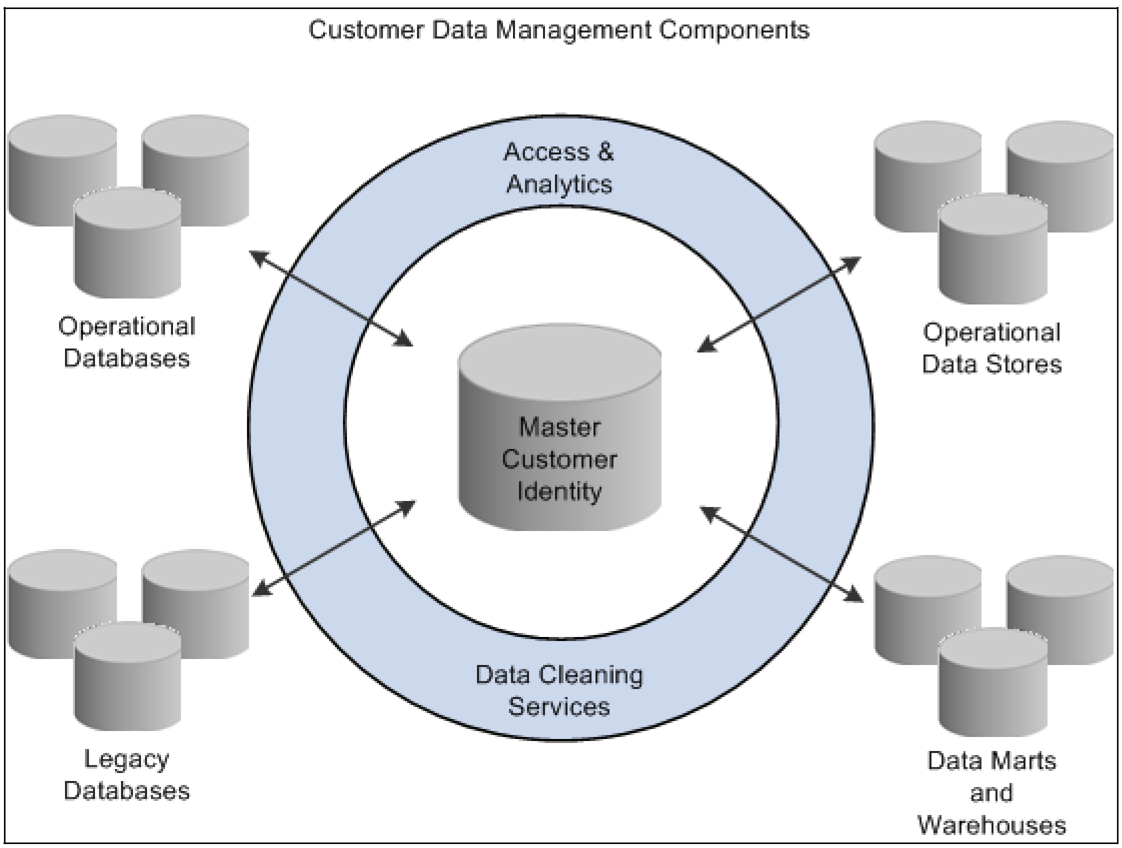
- The *Oracle Trading Community Architecture Reference Guide* contains seeded relationship types, seeded Data Quality Management data, Dun and Bradstreet data elements, Bulk Import interface table fields and validations, and a comprehensive glossary. This guide supplements the documentation for Oracle Trading Community Architecture and all products in the Oracle Customer Data Management family.
- The *Oracle Trading Community Architecture User Guide* describes the Oracle Trading Community Architecture (TCA) and how to use features from the Trading Community Manager responsibility to create, update, enrich, and cleanse the data in the TCA Registry. It also describes how to use Resource Manager to define and manage resources.

Understanding Customer Data Hub Integration

Oracle Customer Data Hub (CDH) provides a single source of customer data for use across multiple systems where users create and maintain customer data. The CDH is the center of a hub-and-spoke architecture in which disparate systems independently synchronize customer data with the CDH.

The Customer Data Hub was developed to consolidate an organization's party-related data from a heterogeneous application into a single repository. Information is shared between external applications (known by the CDH as source, or spoke, systems) and the CDH, providing a consistent view of party-related data across an organization's many business applications. Any number of source systems may become the "spokes" of a CDH solution, meaning that they are a provider and/or consumer of the hub's data.

The following diagram illustrates the hub and spoke architecture of the Oracle CDH:



Hub and spoke architecture of Oracle Customer Data Hub

The Peoplesoft CRM integration with Oracle CDH provides your organization with customer data management functionality that includes:

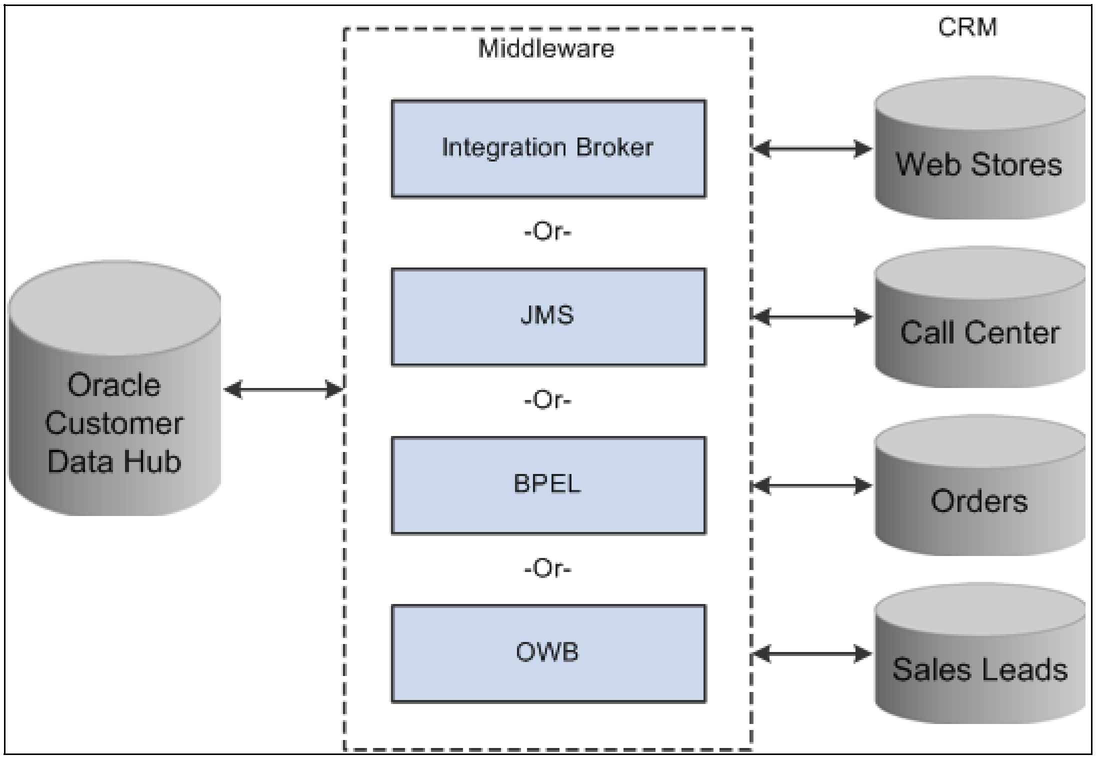
- *Data synchronization* ensures that the PeopleSoft system has the most current customer data available and that updates made by PeopleSoft users are uploaded to the master data repository.
- *Smart searches* use matching rules and fuzzy search logic to help users locate existing customer records.
- *Online duplicate identification and prevention* uses matching rules and fuzzy logic to synchronously check for duplicate records in Oracle CDH when a user creates a new customer record in the PeopleSoft system.
- *Merge requests* enable users to notify the Oracle CDH data librarian of potential duplicate records.

Understanding Integration Architecture

The PeopleSoft CRM to CDH integration is made up of various integration components, each playing a unique role:

- As with other types of integrations involving PeopleSoft CRM, the PeopleSoft Integration Broker handles inbound and outbound messaging and acts as the integration gateway. It supports asynchronous as well as synchronous messages, as employed in this integration.
- The JMS or Java Messaging Service server serves as a standards-based Message Queuing system and guarantees delivery of the asynchronous messages that are exchanged between CRM and CDH.
- Pre-built BPEL or Business Process Execution Language processes are delivered to handle the integration flows between CRM and CDH. These processes execute on the BPEL Server.
- Finally OWB or Oracle Warehouse Builder is used as the Extract, Transform, and Load (ETL) tool to extract and move data from CRM into CDH during Full Sync.

This diagram illustrates how the integration components interact between PeopleSoft CRM and CDH:



Integration between PeopleSoft CRM and CDH

Understanding Data Synchronization and Data Mapping

This section provides an overview of CRM / CDH data synchronization and discusses data mapping.

One of the main goals of the Customer Data Hub is to consolidate customer data from all spoke applications.

Full Sync capability is provided so that customer data from PeopleSoft CRM can be extracted in bulk and then imported into CDH by a batch process. Full Sync is particularly useful when all customer data from CRM is to be moved into CDH for the first time in a new implementation.

See Full Data Synchronization

The *Incremental Sync* capability of the PeopleSoft CRM to CDH integration ensures that whenever customer data is added to or updated on one system, it is immediately synchronized to the other system. Thus, Incremental Sync is a bidirectional data sync mechanism that seeks to keep both the systems in sync at all times.

See Incremental Data Synchronization

Understanding CRM to CDH Data Mapping

The Business Object Relationship Model (BORM) is a flexible data model that serves as the foundation on which all PeopleSoft CRM applications are built. The BORM provides a configurable means to define and capture relationships about customers, suppliers, partners, contacts and any other objects (people, organizations, or database objects) that are meaningful to our customers, the deploying organizations.

The CDM is built on top of the BORM to provide common APIs for the various CRM applications such as PeopleSoft Field Service, Support, Sales, HelpDesk and Marketing to retrieve and update common core data. In CDM, every entity is considered a *Business Object* (BO). A BO can be one of the following types:

- Organization

  ABC Corporation

- Individual

  John Smith

- Database Object

  Checking Account

This information is captured in the PS_BO record. Each BO can play one or more roles and can participate in one or more relationships. Roles and relationships are captured in PS_BO_ROLE and PS_BO_REL, respectively.

Oracle Customers Online (OCO) is based on the TCA (Trading Community Architecture) data model and functionality. The TCA is the foundation of customer information used across the E-Business Suite including CDH as common business data to provide a unified view of the people, organizations, places, and relationships. In TCA, every entity is known as a *Party.* A Party can be one of the following types:

- Organization

  Oracle Corporation

- Person

  Jane Doe

- Group

  World Wide Web Consortium

- Relationship

  Jane Doe, a contact at Oracle Corporation

This information is maintained in the HZ_PARTIES record. Each Party can play one or more roles (defined in Party Usage functionality in R12 - HZ_PARTY_USG_ASSIGNMENTS) and can participate in one or more relationships (maintained in HZ_RELATIONSHIPS and other tables).

Source System Management

Source System Management (SSM) functionality enables implementing organizations to store the customer entity mappings between records in the CDH and those in disparate source systems. SSM provides the ability to maintain mappings between CDH and any external source system including enterprise, legacy, and enrichment source systems, all of which integrate with CDH. The source system (OS) as well as the record ID (OSR) of the entity in the source system is mapped to the Registry ID of the TCA record, such as the party or contact point. Source System setups must be established for all external systems interacting with the Customer Data Hub. This entails creating the source system record in the SSM administration console, and mapping the entities between a particular source system and the Customer Data Hub. All entities of a customer within the CDH that are mapped to external systems are tracked through Source System Management. Examples of such entities include parties, locations, and contacts.

Mapping CDM BO Types and Role Types

This table summarizes CDM BO Types and Role Types that are synchronized with CDH. This information is equivalent to the Party layer information in TCA.

Role Type ID/ Description	***BO Type ID /Description***	***Description***
2 - Company	2 - Organization	A Company is an organization that can be a customer. Companies can have sites and contacts.
3 – Site	2 - Organization	A Site is a physical location or logical subdivision of a company. For the core CRM applications, a site must have a parent company. In the CRM Energy solution, sites are used to model premises. In this case, a premise does not have a parent company. Only sites associated with a company will be synchronized with CDH.
11 - Partner	2 - Organization	A Partner is an organization that does business on behalf of the enterprise – the deploying organization.
1 - Person	1 - Individual	A Person can play many additional roles: contact, consumer, and other. Only Contact and Consumer roles will be synchronized.
4 - Worker	1 - Individual	A Worker is an individual who is employed by the deploying company. Only the person role of Worker will be synchronized with CDH.
8 - Contact	1 - Individual	A Contact is an individual who represents an organization or another individual.
9 - Consumer	1 - Individual	A Consumer is an individual who buys products or services.
88 - POI	1 - Individual	A Person of Interest can be any individual who interacts with the deploying company (such as attorneys, consultants, and so forth). Only the Person role of POI will be synchronized with CDH.

Mapping CDM Roles

CDM captures and stores customer information in PS_BC, PS_BC_SOLDTO_OPT, PS_BC_BILLTO_OPT, and PS_BC_SHIPTO_OPT. This information, known as BC (Business Contact) is equivalent to the Account layer in TCA.

To support the integration of account layer information, the following CDM roles are synchronized with the TCA:

Role Type ID/ Description	BO Type ID /Description	Description
40 – Business Contact	2 - Organization	This role is dynamically assigned to every Customer that is an Organization.
41 – Ship To	2 - Organization	This role is assigned to every customer that is an organization if it can receive shipments.
42 – Sold To	2 - Organization	This role is assigned to every customer that is an organization if it can make purchases.
43 – Bill To	2 - Organization	This role is assigned to every customer that is an organization if it can receive payments.
44 – Business Contact	1 - Individual	This role is dynamically assigned to every Customer that is an Individual.
45 – Ship To	1 - Individual	This role is assigned to every Customer that is an Individual if he/she can receive shipments.
46 – Sold To	1 - Individual	This role is assigned to every Customer that is an Individual if he/she can make purchases.
47 – Bill To	1 - Individual	This role is assigned to every Customer that is an Individual if he/she can receive payments.

Mapping CDM Relationships

In CDM, two roles are linked together to form a relationship. For example, a Company Contact Relationship is made up of the Company Role (2) and the Contact Role (8).

This table lists the CDM Relationships that are synchronized with CDH:

Relationship Type	***Role 1***	***Role 2***	***TCA Relationship Type***
4 - Company / Site	2 - Company	3 - Site	HZ_RELATIONSHIP_TYPES.RELATIONSHIP_TYPE = PARENT/SUBSIDIARY HZ_RELATIONSHIPS.RELATIONSHIP_CODE = PARENT_OF HZ_RELATIONSHIPS.RELATIONSHIP_CODE = SUBSIDIARY_OF
10 - Contact / Company	8 - Contact	2 - Company	HZ_RELATIONSHIP_TYPES.RELATIONSHIP_TYPE = CONTACT HZ_RELATIONSHIPS.RELATIONSHIP_CODE = CONTACT, HZ_RELATIONSHIPS.RELATIONSHIP_CODE = CONTACT_OF
12 - Contact / Site	8 - Contact	3 - Site	HZ_RELATIONSHIP_TYPES.RELATIONSHIP_TYPE = CONTACT HZ_RELATIONSHIPS.RELATIONSHIP_CODE = CONTACT, HZ_RELATIONSHIPS RELATIONSHIP_CODE = CONTACT_OF
14 - Contact / Consumer	8 - Contact	9 - Consumer	HZ_RELATIONSHIP_TYPES.RELATIONSHIP_TYPE = CONTACT HZ_RELATIONSHIPS.RELATIONSHIP_CODE = CONTACT, HZ_RELATIONSHIPS RELATIONSHIP_CODE = CONTACT_OF
18 - Parent Company / Company	2 - Company	2 - Company	HZ_RELATIONSHIPS.RELATIONSHIP_CODE = PARENT_OF RELATIONSHIP_CODE = SUBSIDIARY_OF HZ_RELATIONSHIP_TYPES.RELATIONSHIP_TYPE = PARENT/SUBSIDIARY
Contact / Partner	8 - Contact	11 - Partner	HZ_RELATIONSHIP_TYPES.RELATIONSHIP_TYPE = CONTACT HZ_RELATIONSHIPS.RELATIONSHIP_CODE = CONTACT, HZ_RELATIONSHIPS RELATIONSHIP_CODE = CONTACT_OF

Mapping CDM Tables

The following CDM tables are synchronized with CDH:

CDM Record / Description	***TCA Record / Description***
PS_BO Core CDM table containing basic information about a BO. Every entity in CDM has a BO record. There are three types of BOs in CDM: • Organization • Individual • Database Object (such as Checking Account) Unlike CDM, TCA captures an extra Party record (system generated) in HZ_PARTIES table for each relationship (when HZ_RELATIONSHIP_TYPES.CREATE_PARTY_FLAG = 'Y'). For example, John Smith is a Contact for ABC Corporation. There will be two BOs stored in PS_BO. But, HZ_PARTIES will contain three rows: • John Smith • ABC Corporation • John Smith at ABC Corporation	*HZ_PARTIES* The HZ_PARTIES table stores basic information about parties that can be shared with any relationship that the party might establish with another party. Although a record in the HZ_PARTIES table represents a unique party, multiple parties can have the same name. Parties can be one of four types: • Organization Oracle Corporation • Person Jane Doe • Group World Wide Web Consortium • Relationship Jane Doe at Oracle Corporation The HZ_PARTIES table contains de-normalized information from the following tables (for performance and UI reasons): • HZ_LOCATIONS • HZ_PERSON_PROFILES • HZ_CONTACT_POINTS • HZ_ORGANIZATION_PROFILES • HZ_PERSON_LANGUAGE • HZ_CODE_ASSIGMENTS For integration purposes, CDM does not map CDM records to de-normalized data in HZ_PARTIES. For example, Address information is synchronized between PS_CM and HZ_LOCATIONS.
PS_BO_NAME Stores a Primary Name and an unlimited number of non-primary names. Currently, there are two Name Types: *Preferred* and *Alternate.* A new Name Type of *Merged* has been added to accommodate the CDM/CDH integration.	*HZ_PARTIES* CDH stores the Identifying Party Name (equivalent to Primary Name in CDM) and five additional names in KNOWN_AS – KNOWN_AS5. Only the last five non-primary names (with the latest modified date) in CDM are synchronized with CDH.

CDM Record / Description	***TCA Record / Description***
PS_CM Stores all Contact Methods (means of communication) including: Address, Email, Phone, (Pager and Fax – types of Phones). Each Contact Method can be associated with multiple BOs. CDM only captures a single URL for an Organization. CDH maintains multiple URLs in HZ_CONTACT_POINTS. The Primary URL is denormalized into HZ_PARTIES. CDM maps RD_COMPANY.WEB_URL to HZ_CONTACT_POINTS.URL (where HZ_CONTACT_POINTS.PRIMARY_FLAG = 'Y').	*HZ_LOCATIONS* *HZ_CONTACT_POINTS* HZ_LOCATIONS stores addresses only. The same addresses can be assigned to multiple Parties. HZ_CONTACT_POINTS stores other means of contact (contact methods) which include: • Email • Phone • Web • Telex • EDI (Not captured in CDM) Each Contact Point record belongs to a particular Party. It is equivalent to BO_CM in CDM.
PS_BO_CM An associative table between BO and CM to associate BOs with CMs (Many to Many).	*HZ_PARTY_SITES* *HZ_CONTACT_POINTS* HZ_PARTY_SITES stores addresses for a Party. HZ_CUST_ACCT_SITES_ALL is to link Customer Account to Party Sites. HZ_CONTACT_POINTS stores all other Contact Methods for a Party.
PS_BO_CM_USE Stores usage information about a particular BO_CM record.	*HZ_PARTY_SITE_USES* *HZ_CONTACT_POINTS* HZ_PARTY_SITE_USES stores usage information about a particular Party's Addresses stored in HZ_PARTY_SITES. There is no equivalent usage table for HZ_CONTACT_POINTS in TCA.
PS_BC Captures customer information.	*HZ_CONTACT_PREFERENCES* HZ_ORG_PROFILES_EXT_B HZ_PER_PROFILES_EXT_B PS_BC is mapped to HZ_CONTACT_PREFERENCES to synchronize contact preferences information for organizations.

CDM Record / Description	*TCA Record / Description*
PS_BC_SOLDTO_OPT *PS_BC_SHIPTO_OPT* *PS_BC_BILLTO_OPT* Stores customer information.	*HZ_ORG_PROFILES_EXT_B* *HZ_PER_PROFILES_EXT_B* PS_BC_XXX tables synchronize with TCA's Extensible Fields.
PS_BO_ROLE Stores information about roles that a BO can play. A BO can have multiple Roles. For example, John Smith is a Person (Role Type 1) who happens to be a Contact (Role Type 8) of ABC Corporation (Role Type 2) and he also buys products/services for his own consumption (Role Type 9 – Consumer).	*HZ_PARTY_USG_ASSIGNMENTS* There is no equivalent functionality in TCA for CDM roles. HZ_PARTY_USG_ASSIGNMENTS is new in R12 – roughly equivalent to CDM BO_ROLE. CDM roles will be stored in HZ_PARTY_USG_ASSIGNMENTS for merging and searching purposes.
PS_BO_REL Stores information about relationships between BOs. Only Relationship Types listed previously in the CDM Relationships table will be synchronized with CDH. CDM maintains only one row per active relationship. For example, John Smith is a Contact for ABC Corporation. There will be two BOs stored in PS_BO. HZ_PARTIES will contain three rows: 1) – John Smith, 2) – ABC Corporation, 3) – John Smith at ABC Corporation. TCA will have three rows stored in HZ_PARTIES and two rows in HZ_RELATIONSHIPS.	HZ_RELATIONSHIPS HZ_ORG_CONTACTS HZ_ORG_CONTACT_ROLES HZ_RELATIONSHIPS stores information about all types of relationships between two Parties. TCA captures additional details about certain relationships in various TCA tables listed above. There are two rows for each relationship in HZ_RELATIONSHIPS.
PS_RD_COMPANY *PS_RD_CY_INDUSTRY* Store basic information about Companies including some D&B fields. Primary SIC Code is stored on RD_COMPANY. All other SIC Codes are stored in RD_CY_INDUSTRY. RD_CY_INDUSTRY is mapped to HZ_CODE_ASSIGNMENTS in TCA.	*HZ_ORGANIZATION_PROFILES* *HZ_CODE_ASSIGNMENTS* *HZ_FINANCIAL_REPORTS* *HZ_PARTY_USG_ASSIGNMENTS* Store basic information about organizations. Additional information will be captured in HZ_PARTY_USG_ASSIGNMENTS in order to differentiate among Company, Site, and Partner.
PS_RD_SITE Stores basic information about Sites.	*HZ_ORGANIZATION_PROFILES* *HZ_PARTY_USG_ASSIGNMENTS* *HZ_RELATIONSHIPS* Store basic information about organizations. Additional information is captured in HZ_PARTY_USG_ASSIGNMENTS in order to differentiate among Company, Site, and Partner.

CDM Record / Description	***TCA Record / Description***
PS_RD_PARTNER Stores basic information about Partners.	*HZ_ORGANIZATION_PROFILES* *HZ_PARTY_USG_ASSIGNMENTS* *HZ_RELATIONSHIPS* Store basic information about organizations. Additional information is captured in HZ_PARTY_USG_ASSIGNMENTS in order to differentiate among Company, Site, and Partner.
PS_BO_EXEMPT *PS_BO_EXEMPT_DTL* Store tax-exempt information for a particular customer.	HZ_ORG_PROFILES_EXT_B HZ_PER_PROFILES_EXT_B There is no corresponding record in TCA, so we use the Extensibility Framework to capture fields in CDM.
PS_RB_INT_CUSTOMER Captures customer information for CRM/SCM integration purposes.	*HZ_ORG_PROFILES_EXT_B* *HZ_PER_PROFILES_EXT_B* PS_RB_INT_CUSTOMER is an interface table used in CRM/SCM integration.
PS_CUST_TEAM Captures customer information for CRM/SCM integration purposes.	*HZ_ORG_PROFILES_EXT_B* *HZ_PER_PROFILES_EXT_B* PS_CUST_TEAM is an interface table used in CRM/SCM integration.
PS_CUST_CGROUP Captures customer information for CRM/SCM integration purposes.	*HZ_ORG_PROFILES_EXT_B* *HZ_PER_PROFILES_EXT_B*
PS_RD_PERSON *PS_RD_PERS_NID* Store basic information about Persons.	*HZ_PERSON_PROFILES* *HZ_PERSON_LANGUAGE* *HZ_CONTACT_PREFERENCES* Store basic information about Persons.
PS_BO_EMPLOYMENT Stores employment data for Persons.	*HZ_EMPLOYMENT_HISTORY* Stores employment data for Persons.

CDM Record / Description	TCA Record / Description
PS_RA_DUN_BRAD_TBL Contains D&B fields used in Marketing as Profile Fields. These fields are derived from various D&B tables via an interface with D&B (Worldbase Marketing Plus). These are the only Profile Fields that will be synchronized with CDH. It should be noted that this table would only be populated if the deploying company were integrated with D&B. Furthermore, the deploying company may choose to keep the current integration (license) with D&B or change the integration from D&B to go to CDH.	*HZ_ORGANIZATION_PROFILES* *HZ_FINANCIAL_REPORTS* *HZ_FINANCIAL_NUMBERS* *HZ_FINANCIAL_PROFILES* HZ_CREDIT_RATINGS HZ_RELATIONSHIPS D&B Fields are scattered in various TCA tables. The HZ_RELATIONSHIPS table provides links to hierarchical D&B data to be updated in PS_RA_DUN_BRAD_TBL.

Understanding Full Data Synchronization

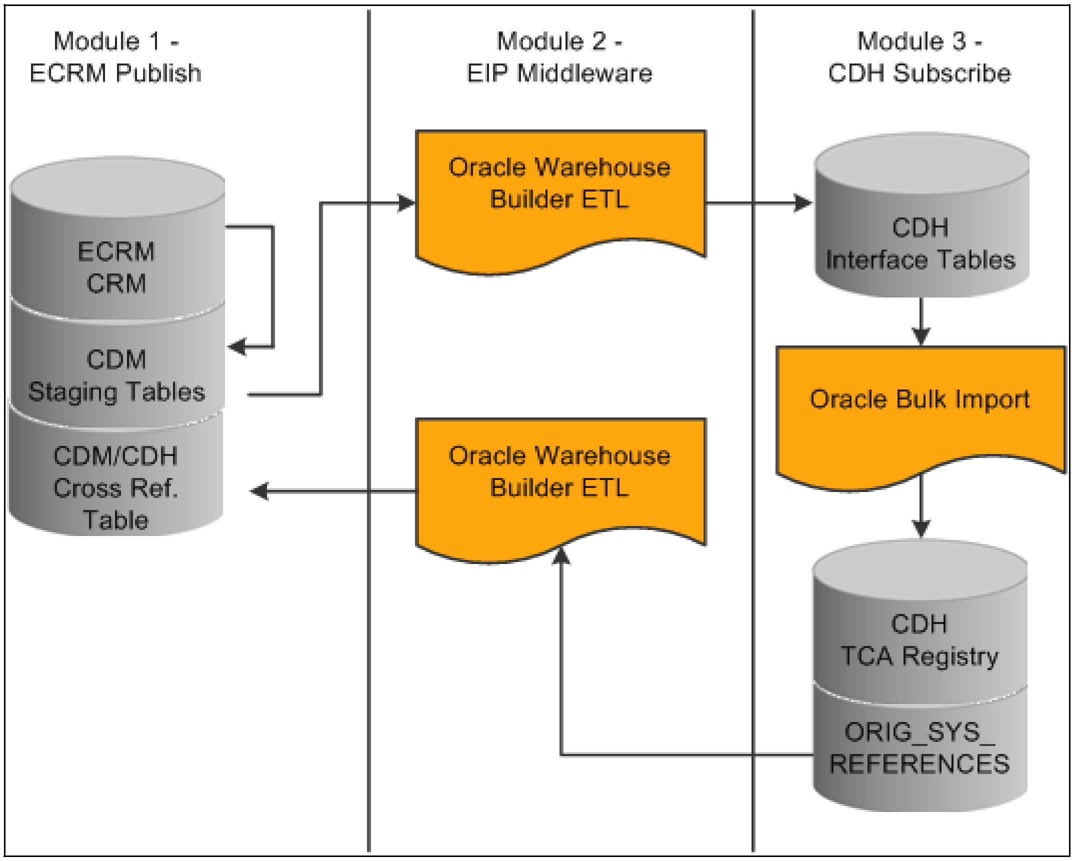
A full-sync integration process is provided to initially load data from CRM to CDH. You would run a full-sync integration when implementing the CDH in an existing PeopleSoft CRM installation.

Full-sync integration uses these existing technologies:

- Oracle Warehouse Builder (OWB).
- Oracle Bulk Import.
- PeopleSoft Data Import.

Understanding the Full Sync Process

This diagram illustrates the full sync publish process:



Full sync publish process

The full sync process involves the following processes:

- CRM to CDH - Data Mapping

  Data is mapped between the CRM CDM and CDH TCA.

- Customer Full-Sync Publish AE (Application Engine) Process

  This AE process extracts data from CDM Objects and loads them into one or multiple staging tables.

- Oracle Warehouse builder ETL Process

  Using the Oracle Warehouse Builder ETL process you deploy the ETL scripts and use the ETL tools to extract the source information and transform the values to adhere to the data requirements of the interface tables.

- Oracle CDH Bulk Import Process

  Once the data has been loaded into the interface tables, you send the batch for import. This is done using the UIs in CDH Data Librarian. As each batch in the interface tables is selected for import and moved into staging tables for processing, the data is matched against the MOSR mapping tables to determine if the record is an explicit update or insert. From the staging tables the data is sent through the appropriate TCA validations to maintain data integrity of all information being loaded and sent to Data Quality Management (DQM) for duplicate identification as requested by the user. Records that pass validation are moved into the appropriate TCA tables and records that fail are sent to the Errors Table.

Data Mapping

Data is mapped between the CRM CDM and CDH TCA.

See Understanding CRM to CDH Data Mapping

Full-Sync Publish AE (Application Engine) Process

A series of AE processes extracts, transforms and loads the data from CDM business objects to CRM staging tables adhering to the structure of the TCA interface tables.

Five AE processes, RB_PUB_COMP, RB_PUB_CNTCT, RB_PUB_SITE, RB_PUB_CONS, RB_PUB_PRTNR export CDM data for Company, Contact, Site, Consumer, and Partner respectively with the corresponding Contact Methods.

See *PeopleTools 8.52: Application Engine PeopleBook*

Oracle Warehouse Builder ETL Process

The full-sync process uses Oracle Warehouse Builder ETL, (Extraction Transformation & Loading), technology as the middleware for the initial high volume data upload.

Oracle Warehouse Builder (OWB) is a framework for the creation of extraction, transformation, and loading scripts used to populate a data warehouse or operational data store.

OWB understands a diverse set of data sources. It accesses a data source by means of an *integrator*. An integrator is an OWB component that has been specifically written to access particular type of data sources: relational databases and flat files OWB also uses the concept of a *module*, which is a logical grouping of related objects. There are two types of modules: data source and warehouse. Modules contain definitions such as metadata. The user chooses the integrator that is appropriate for the source, and the integrator accesses the source and imports the metadata that describes it.

See *Oracle Warehouse Builder Reference & User Guide*

Oracle CDH Bulk Import Process

Oracle Bulk Import is Oracle's data load architecture used to import large volumes of *party* data into the TCA registry. A set of data to be loaded into the TCA Registry at one time is called a *batch*. The data in one batch must be from the same data source. The interface tables can store as many batches from different sources as needed, and any number of batches can be actively populating the interface tables at the same time.

The Bulk Import process consists of definition, setup, batch processing, reporting, validating, and purging.

The customer data is extracted from its current location using ETL tools, and the values are transformed to adhere to the data requirements of the interface tables, and to populate the tables with large volumes of information. After information is loaded into one or more of the 11 logical interface tables in batches, one batch per source of data, Batch Import transfers batches of data from the interface tables into the TCA Registry.

Eleven logical interface tables can be populated to provide detail to any of fourteen TCA tables.

Interface Tables	***TCA Tables***
HZ_IMP_ADDRESSES_INT	HZ_PARTIES
HZ_IMP_ADDRESSUSES_INT	HZ_PERSON_PROFILES
HZ_IMP_CLASSIFICS_INT	HZ_ORG_PROFILES
HZ_IMP_CREDITRTNGS_INT	HZ_RELATIONSHIPS
HZ_IMP_CONTACTPTS_INT	HZ_ORG_CONTACTS
HZ_IMP_FINNUMBERS_INT	HZ_LOCATIONS
HZ_IMP_FINREPORTS_INT	HZ_PARTY_SITES
HZ_IMP_PARTIES_INT	HZ_PARTY_SITE_USES
HZ_IMP_RELSHIPS_INT	HZ_CODE_ASSIGNMENTS
HZ_IMP_CONTACTS_IMP	HZ_CREDIT_RATINGS
HZ_IMP_CONTACTROLES_INT	HZ_CONTACT_POINTS
	HZ_FINANCIAL_NUMBERS
	HZ_FINANCIAL_REPORTS
	HZ_ORG_CONTACT_ROLES

TCA provides validations and optional de-duplication to ensure the quality of the imported information. De-duplication identifies and resolves duplicates only within the batch that you are importing from the interface tables. You should purge data from the interface tables after the corresponding batch has been loaded to TCA, to reduce the overall size of the interface tables and improve performance for subsequent batch loads.

See *Oracle Trading Community Architecture Technical Implementation Guide*

See *Oracle Trading Community Architecture Administration Guide*

Understanding Incremental Data Synchronization

CRM provides bi-directional integration with the Customer Data Hub (CDH) for all customer data (objects). The business objects that are synchronized are Company, Sites, Partners, Consumers and Contacts. CDH is the single source truth (SST) of customer data. Other PeopleSoft systems, such as Supply Chain Management, may also integrate with CDH. Configuration of what systems integrate with CDH and the record mapping will be defined in Source System Management (SSM) in CDH.

This section discusses:

- Outbound Incremental Sync: CRM to CDH
- Inbound Incremental Sync: CDH to CRM
- Syncing data from CRM to SCM
- Coordinating Data Models

Integration Data Formats

During an inbound or outbound integration process, the customer data will be in different formats at different stages of the integration. There are three representations of a *Customer* in the CRM system that need to be considered in the CRM / CDH Integration:

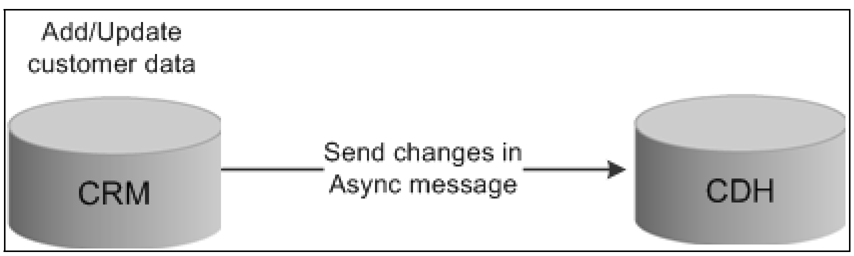
- When notifications come in to CRM, they start in the form of XML that Integration Broker delivers to an CRM Notification Handler.
- The Notification Handler will then take the XML and put them in to Messaging Data Objects.

  These data objects mirror the structure of the XML, but exist so that applications downstream in the process do not have to do any XML parsing to get at the XML content. They deal with the inbound notification as application classes.
- From there, the data must be adapted in to the BORM classes that they can ultimately be persisted as customer data.

  On the outbound side, the opposite is true. The data starts in BORM objects and must be adapted to the Messaging Data Types. From there, it can be easily converted to XML and sent out as an XML notification.

Outbound Incremental Sync: CRM to CDH

With the CRM to CDH incremental sync, additions or updates to customer data in CRM are sent to CDH via an asynchronous message. CDH processes this message and in turn updates its data in its Trading Community Architecture data model. No response message is sent from CDH to CRM.



CRM to CDH Messaging

Sending a message to CDH to create a new customer or to update an existing customer is implemented as an asynchronous process. BEPL and its Oracle Application adapter are used for invoking a web service on the CDH side.

The CDM message is published through IB and is sent out to JMS for publishing to BPEL. During any save processing of a CDM object, the EIP Adapter application class generates a corresponding notification message and publishes it to a specific JMS topic.

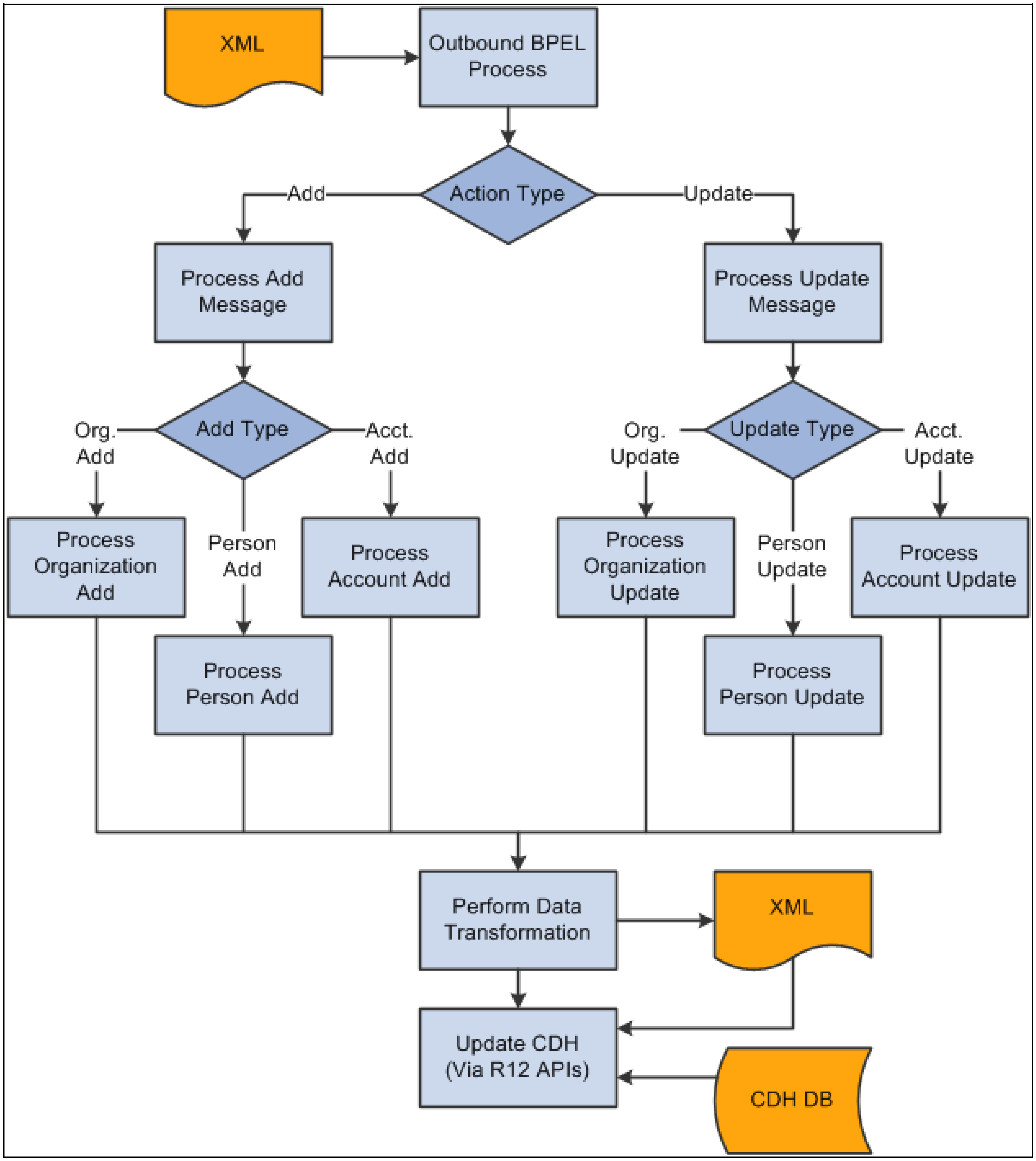
BPEL processes listen to the JMS topic, pick up a message instance, and call the appropriate CDH APIs to update TCA data.

Outbound BPEL Processes: CRM to CDH

The following BPEL processes support outbound integration from CRM to CDH:

- Organization Add (CDM Publish/CDH Subscribe)
- Organization Update (CDM Publish/CDH Subscribe)
- Company Add (CDM Publish/CDH Subscribe)
- Company Update (CDM Publish/CDH Subscribe)
- Person Add (CDM Publish/CDH Subscribe)
- Person Update (CDM Publish/CDH Subscribe)
- Contact Add (CDM Publish/CDH Subscribe)
- Contact Update (CDM Publish/CDH Subscribe)

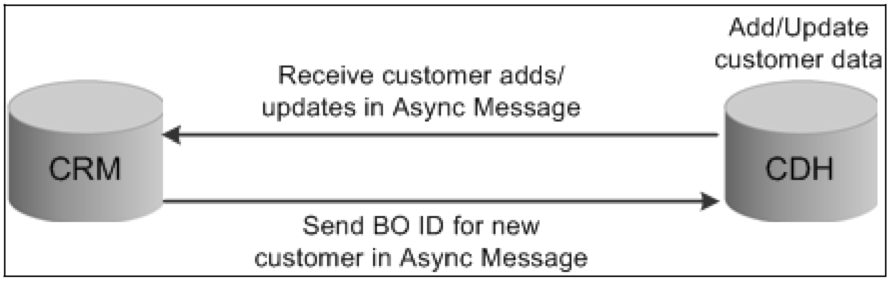
This diagram illustrates an outbound BPEL process:



Outbound BPEL process

Inbound Incremental Sync: CDH to CRM

In the CDH to CRM incremental sync, additions or updates to customer data in CDH are sent to CRM via an asynchronous message. CRM processes this message by updating its own data and then sends back to CDH an asynchronous message containing the CRM key values of the objects added. Business Object ID or BO_ID is one example of a CDM key. CDH stores the CRM keys it receives in its Source System Management tables.



CDH to CRM Messaging

The following steps describe an inbound messaging sequence for a consumer object:

1. When a customer is added or updated in CDH, business events are raised and a change message is put onto the Advanced Queue (AQ).

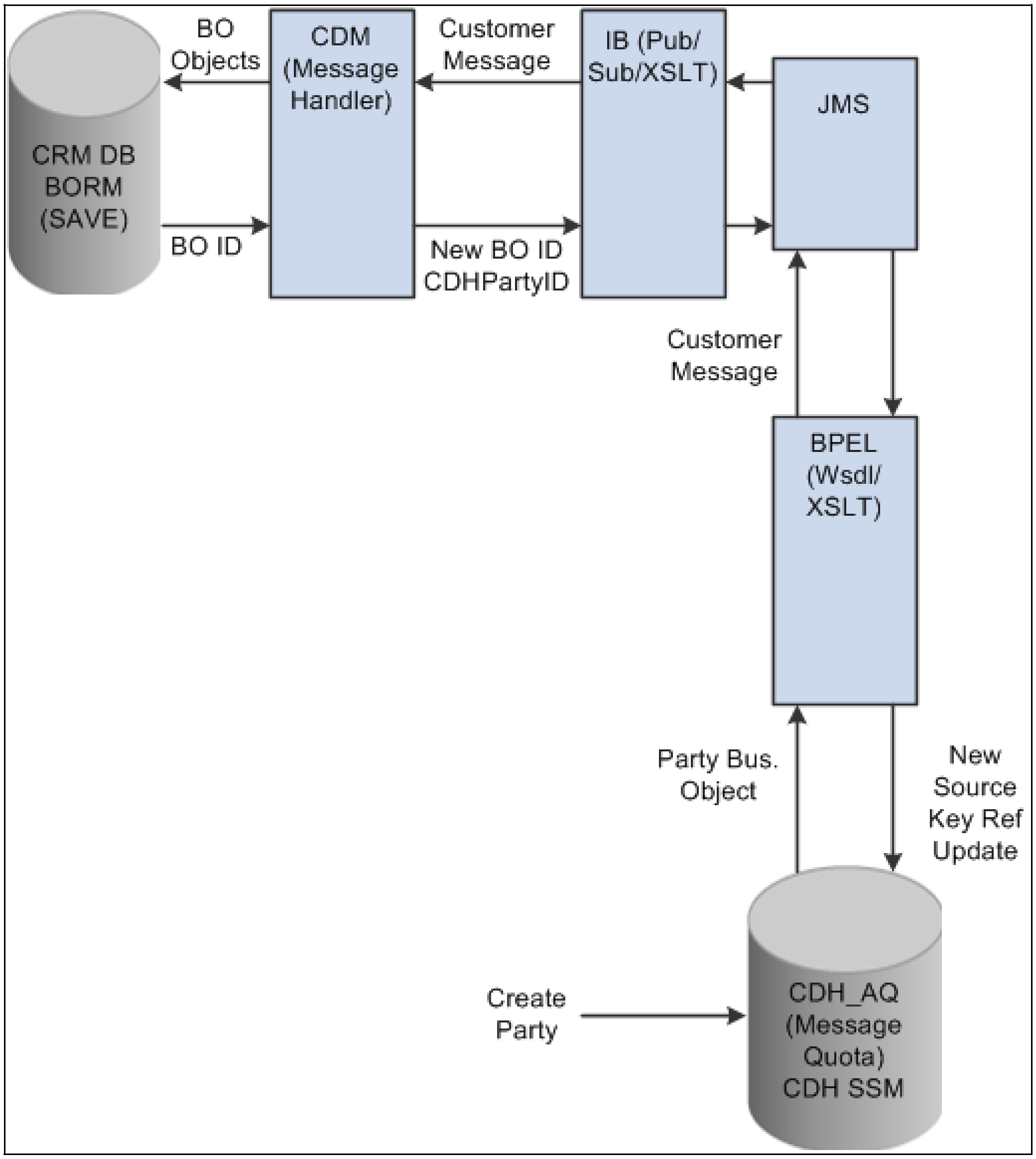
2. A BPEL process subscribes to the queue, transforms it into Customer Schema and sends it to Java Message System (JMS)

3. Peoplesoft Integration Broker (IB) subscribes to the JMS message and invokes the application logic to handle the incoming CDH messages.

4. CRM sends back the newly created BO ID to CDH to be updated in the Source Management System table.

   This key cross-reference information must be maintained so that the two systems will be able to communicate future updates for the newly created BO. In some update cases (such as when a new CM is added or a CM Profile Sequence has changed), key data needs to be passed back to CDH to be updated in the SSM.

This diagram illustrates the inbound integration from CDH to CRM where a consumer is added in CDH and is sent to CRM:



Inbound integration from CDH to CRM

Inbound BPEL Processes

The following BPEL processes support inbound integration from CDH to CRM:

- Organization Add

  An Organization Add will be treated as a Company since TCA has no concept of Site or Partner.

  Note. If SCM is a spoke on the hub and is set up as the master of customer data, CDM expects the Customer ID to be populated. If the Customer ID is not populated, CDM will ignore the add message.

- Organization Update

  The BPEL process checks the Action Flag to determine which TCA record has been modified and extracts it to map to the CDM Customer schema.

  Note. Within CRM, the BO_ROLE table is checked to determine if the update is for a Company, Site, or Partner. If both Company and Partner roles are found, the object will be considered a Company.

- Person Add

  Note. In CDM, a Contact role for a Person will always be created.

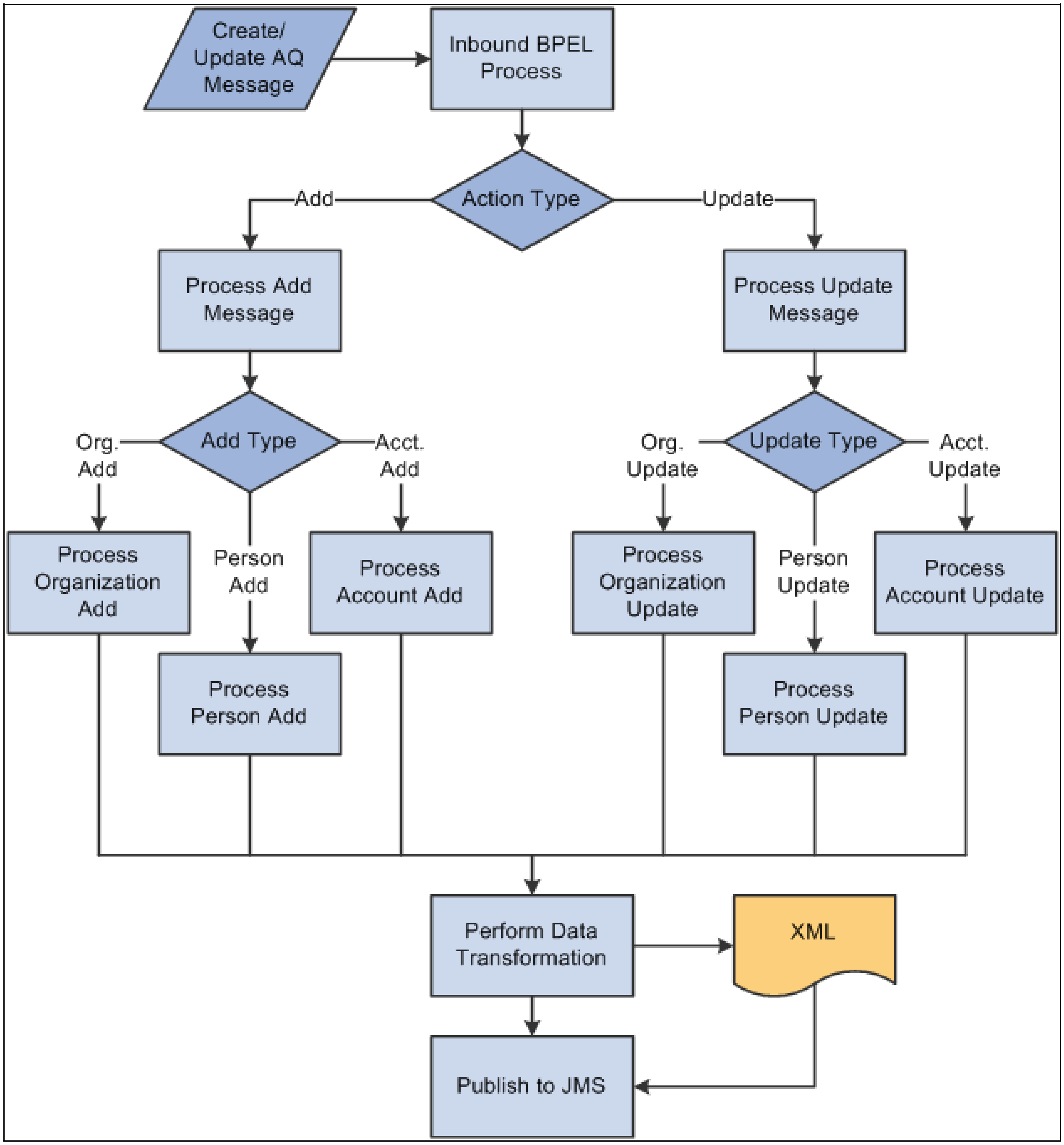
- Person Update
- Source System Management Update

  TCA maintains cross-reference information between CDH and other spokes by populating key fields and record names in HZ_ORIG_SYS_REFERENCES table.

  A BPEL process handles the SSM update by calling update_orig_sys_reference API.

  For inbound add messages, CDM will return key fields to TCA to be updated in HZ_ORIG_SYS_REFERENCES for certain tables.

This diagram illustrates the inbound BPEL process:



Inbound BPEL process

Syncing data from CRM to SCM

PeopleSoft Supply Chain Management (SCM) can integrate with CDH as well. In this case, CRM and SCM will not directly exchange customer data.

Customers have the option to use incremental sync of customer data between CRM and SCM through CDH or directly between CRM and SCM. For example a customer might implement CDH in phases, first integrate with CRM, and then integrate with SCM, or vice versa.

This section discusses the business scenarios based on whether CRM is integrating with SCM or not.

SCM Integrates with CDH

If SCM integrates with CDH, messages to exchange customer data between CRM and SCM will be inactivated, and messages between SCM and CDH will be activated. Both CRM and SCM need to populate the TCA in the same manner so that a customer entered in either SCM or CRM will have the same attributes populated in the other system in the same way the current EIP functions. Consistency between the two applicationsis maintained for the following attributes:

- SetID
- Customer ID
- Customer Group
- Address Seq Nbr
- Other flex fields
- Determination of single account to use in PS

Note. The process to generate customer IDs in CRM for a new customer will not change. SCM must always be the master for generating the ID.

There are three scenarios for customer ID generation in the CRM/SCM integration:

- Customer created in CRM
  - When a customer is added in CRM, the customer ID is requested from SCM before sending the new customer to CDH. Both the SetID and Cust ID are in the message sent to CDH.
  - When SCM receives the new customer from CDH, it uses the SetID and Cust ID in the message to create the customer, and it sends the same keys to CDH to be stored in SSM.
  - Since SetID and Cust ID are not in TCA, both CRM and SCM should use the same TCA flexible fields to map SetID and Cust ID. CRM will update the RB_INT_CUSTOMER, RB_INT_CUST_AD and RB_INT_CONTACT records, as these will still be used by applications for transaction sync.
- Customer created in SCM
  - Customers added in SCM are sent to CDH and then CDH sends them to CRM. CRM sends IDs for new customers to CDH to be stored in SSM.
  - CRM uses the SetID and Cust ID passed in the flexible fields to create a row in the company record.
  - CRM updates the RB_INT_CUSTOMER, RB_INT_CUST_AD, and RB_INT_CONTACT records, as these will still be used by applications for transaction sync.

- Customer created in a non-PeopleSoft spoke
  - Customers added in CDH are sent to CRM and SCM. In this scenario, the flexible fields mapped to SetID and Cust ID will be blank.
  - CRM does not process the message since SCM is configured to be the master to generate Customer IDs and the message has a blank Cust ID. In this case, CRM will discard the message and will not insert the entry into the error tables.
  - SCM receives the message, creates the new customer and sends the IDs for the new customer to CDH to be stored in SSM. Since SetID and Cust ID are stored in the flexible fields in CDH, this will be considered an update transaction and SCM will send the updates to CDH.
  - In CDH there will be a customer update event for a customer that does not have an entry in SSM for CRM. A customer create message will be sent to CRM, where CRM will create the customer and send back the keys to CDH.
  - Existing transactions (EIPs) between CRM and SCM will not be impacted since the process to generate customers did not change.

SCM does not Integrate with CDH

If the option to incrementally sync customer data between CRM and SCM is selected, the Customer messages between these systems will stay active. In this case, for every customer data add/updates, CRM will send changes to CDH using the new message and to SCM using the existing messages. In other words, there will be no changes to existing functionality between CRM and SCM.

Coordinating Data Models

Since there are some differences in the data models of the two systems that are being integrated; some standard rules and defaults have been set up to resolve the differences.

Field	***Details***
SetID	Since SetID is a key field on the RD_COMPANY and RD_SITE tables, SetID is critical to create a company or a site. If one of the other spokes that does not use SetIDs creates a company and sends it to CDH and then to CRM, CRM will create the company or site using the Default SetID for Inbound EIPs configured on the Customer Installation Options page.

Field	***Details***
CDM Role Specific Data	CRM has a concept of role. A Business Object (BO) can have multiple roles in the system. CDH has a similar concept known as a *Party Usage.* However, the relationship and contact method are defined at the role level in CDM, and they are at the party level in CDH. In other words, the same CDM Business Object can have two different primary contacts: one corresponding to its Company role and other to its Partner role. This information cannot be both synchronized to CDH, because its corresponding party can have one and only one primary contact at a time. To solve the problem, we synchronize the primary contact of a Company object to CDH. The primary contact of a Partner is synchronized as a non-primary contact. If a contact is added to a CRM Company-Partner object in CDH, it will be added as a Company Contact in CDM. The same rule is only applied for publishing contact methods. When CRM subscribes, contact method information will be added to both roles In a B2C implementation, if a BO in CRM is a Consumer and a Contact, then the CRM<->CDH integration will honor the Consumer role. That means the CRM Consumer primary contact method will be the Party primary contact method in CDH. However, the CRM Contact primary contact method is a Party's non-primary contact method In a B2B implementation, if a BO in CRM is a Consumer and a Contact, then the CRM<->CDH integration will honor the Contact Role.
Customer Accounts	A CDM customer can have one and only one customer account (BC), but a CDH Organization customer can have many customer accounts (HZ_CUST_ACCOUNTS). As a result, the CDM customer account is mapped to the earliest created CDH customer account.
Effective-dated Contact Methods	CDM contact method data is effective dated, but CDH is not. We only synchronize the current effective dated data. Future effective dated data will be sent to a queue and an AE process will be manually scheduled to process the queue. When the data in the queue becomes current, the AE process will pick it up and send it to CDH.
Object Names	A CDM object can have many names, but a CDH party has a maximum of six names. The latest six names (based on last modified date/time) of a CDM object will be synchronized to CDH.
Currency Code	Operator definition currency – operator ID will be the user defined operator for CRM – CDH integration.
Country Code	Default from Installation
Partner Program	Where one current program exists for the Partner SetID then use that program, if multiples exist, use the last modified program.

Field	Details
Industry classification types (and codes)	CRM and CDH out-of-the-box provide different sets of industry classification types (and codes). A Company in CRM can be optionally classified by a SIC type and code, but in order for this SIC information to be successfully synchronized with CDH, that SIC type and code should also exist in CDH. The same applies to synchronizing a Company from CDH to CRM. In the CRM system, SIC types and codes are established using the SIC Type component (RD_SIC_CODE) under Set Up CRM, Common Definitions, Customer, SIC Codes. **Important!** Because SIC types and codes are sample data, you should ensure that the same industry classification sets exist both on the CDH and CRM side for SIC codes of companies to be correctly synchronized. If this is not done, then SIC codes will not be propagated during the synchronization.
National IDs	A CDM object can have multiple National IDs, one of which is considered the primary. CDH stores only one instance of NID (JGZZ_FISCAL_CODE). The CDM primary National ID will be synchronized to CDH.

Understanding Data Quality Management

This section provides an overview of data quality management and discusses:

- Online duplicate prevention
- Match rules
- Smart search

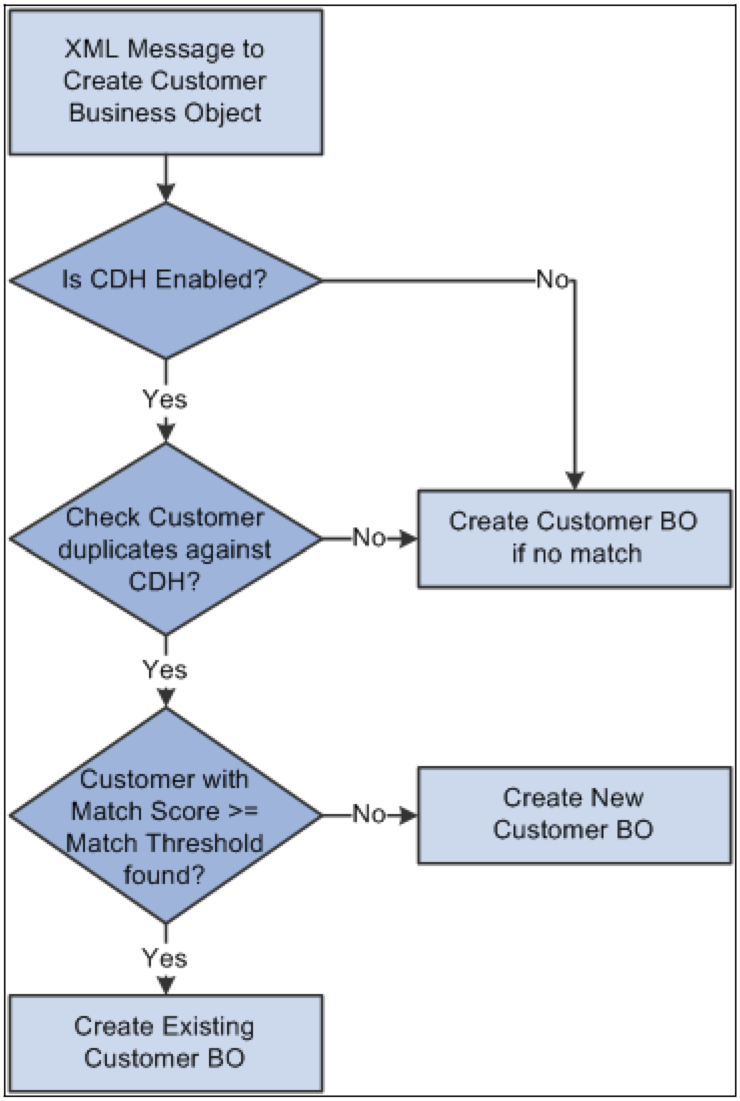
By leveraging Oracle CDH data quality management features, PeopleSoft takes advantage of duplicate prevention and merge, and fuzzy search features, thereby providing a single source of truth for customer data.

The data cleansing activities performed in the CDH help to identify and remove customer duplicates. PeopleSoft CRM users can also identify duplicates utilizing the CDH integration. CRM application users can first search for customers by using a CDH search mechanism called *Smart Search.* The search criteria submitted by the user is directly executed on CDH, and a list of closely matching records is presented to the user in the form of search results. This list could contain duplicate records, which could then be earmarked by users and sent to the CDH Data Librarian in a merge evaluation request message.

Online Duplicate Prevention

PeopleSoft CRM leverages the CDH to prevent the introduction of customer duplicates Before a new customer is created by an online user using Quick Create or from a Customer Data Model component, CDH duplicate prevention logic is invoked. The duplicate prevention logic first does a customer search and presents the CRM user with a list of possible duplicates of the new customer being created. The user can either pick a duplicate from the list, or else proceed with creation of the new customer. Duplicate prevention is also implemented in some CRM batch processes like Lead Import and the Financial Account creation EIP.

This diagram illustrates the duplicate prevention process flow:



Duplicate prevention process flow

Duplicate business objects may get introduced into the system from various application pages in CRM. For example a sales user could create a new Customer record while entering an opportunity, without checking if the customer already exists in the system. Also, typographical errors made by users while entering customer information like name and address often lead to creating a customer that already exists and thus introducing a duplicate.

Duplicate Prevention logic is implemented in specific areas of CRM which deal with creation of new Business Objects:

- All Customer Data Model pages that add new Business Objects support duplicate prevention.
- All Quick Create screens that are used by various application transaction pages to quickly create new Business Objects have been enhanced.
- Certain application business flows implement duplicate prevention logic.

Online Duplicate Prevention logic for Customer Data Model components is enforced during the addition of new Business Objects. When a user tries to add a new Business Object, a list of potential duplicate records is displayed to the user before the component page is opened. This is done by invoking the appropriate Match Rule in CDH. Note that there is no duplicate prevention logic enforced when an existing BO is updated from a CDM component page.

The components that support duplicate prevention during Add operations are:

- Company
- Consumer
- Contact
- Site
- Partner
- Partner Contact

Duplication Prevention logic is also enforced in the CRM *Quick Create* functionality. Quick Creates are a fast and easy way to create a Business Object by providing minimal information. They are normally invoked from application transaction pages, but can also be launched standalone.

Duplicate Prevention on a Quick Create page is triggered when a user tries to save the BO information entered in the page. A list of potential duplicates is displayed to the user based on the results returned by the CDH Match Rule execution. Match Scores are also displayed for each record.

The user can continue creating a new Business Object or can pick an existing BO from the list of potential duplicates. If the user picks an existing BO, then the BO is populated on the originating transaction and any information entered by the user on the Quick Create page is discarded. Quick Creates that create standalone Business Objects, such as Quick Create Consumer, as well as those that create Business Objects with parent-child relationships, such as Quick Create Company with Contact, support duplicate prevention.

Match Rules

To compare PeopleSoft CRM customer records to its own customer records, Oracle CDH relies on match rules that relate equivalent fields. PeopleSoft CRM integration with Oracle CDH is delivered with a set of match rules that must be imported into Oracle CDH during installation. The PeopleSoft system includes pages that show implementers these rules, but any changes to the rules (for example, to accommodate a customized system) must be made in Oracle CDH.

Customers Online contains PeopleSoft data and will be available for the Data Librarian to investigate customers' data. Additionally, the Data Librarian should have access to the PeopleSoft application to view PeopleSoft specific information that is not available in Customers Online.

Understanding Match Evaluation

This table illustrates an example of a match evaluation:

Criteria	***Example***	***Score***
If the Party Name is an exact match, it gets a score of 90	Johnson Inc. = Johnston Inc.	80

Criteria	***Example***	***Score***
If the State is an exact match, it gets an additional 10 points	Colorado = Colorado	10
If the Primary Phone Number is an exact match, it gets an additional 50 points	555-555-1212 = 555-555-1222	40
If Party Name, State & Primary Phone all exactly match, the total score for the match is 150 - a perfect score.	Total Score	130
Match Threshold is 100, so any match that scores over 100 is a match	Match Threshold	100
	Match Evaluation	130 >= 100
	Result	Match

Understanding the Match Rule Process

The match rule process consists of the following steps:

1. Select an attribute such as *State*.
2. Establish the Match Rules
    - Transformations
    - Replacement Lists
    - Custom Callouts
3. Establish the weightings and scoring
    - Assign attribute importance
    - Set threshold
4. Calculate score
    - At search
    - At data import
    - At data creation
5. Evaluate duplicates

    Score > Threshold = Possible Duplicate

Understanding Match Rules

Match rules are defined for the following uses:

- Online Duplicate Prevention

  When a user creates a new business object in CRM, these match rules are invoked. Any resulting matches that exceed the match threshold are presented to the user as potential duplicates. The user can then select one of the potential matches or proceed with the creation. If the override threshold is met or exceeded for a potential match, the user is required to use the matching BO and is prevented from creating a new BO. Online duplicate prevention is defined for Company, Partner, Site, and Person (Contact or Consumer) BOs.

- Smart Search and Merge Initiation from Search

  When a user searches for a Company, Partner, Site, Person or Customer, these match rules are invoked. Any results that exceed the match threshold are listed as potential duplicates, and the user can select two or more potential duplicates and submit them to the data librarian for merge evaluation.

- System Duplicate Identification Batch (SDIB) Match Rules

  These match rules are invoked during batch data cleansing. Even if a match exceeding the match threshold occurs, the merge might be prohibited due to PeopleSoft external merge rules.

Duplicate Prevention Match Rules

The following match rules are invoked when creating new business objects in CRM. The resulting matches, exceeding the Match Threshold, are presented to the user as potential duplicates. Where the Override Threshold for any returned result is met or exceeded, the user is required to select the matching BO and is prevented from creating a new BO.

- Company

  This match rule is used to identify duplicates when creating a company either in the CDM component for Company Add or the Quick Create of Company.

  Address attributes displayed on the page will be based on the country selected by the user

Criteria	***Details***
Match Rule Name	ECRM_COMPANY_ADD
Purpose	Search
Search Operator	Match All Attributes
Match Threshold Percentage	80%
Override Threshold Percentage	100%
Merge Threshold Percentage	N/A

Note. Partner duplicate prevention uses the same rule as Company: ECRM_COMPANY_ADD.

- Site

  This match rule is used to identify duplicates when creating a site either in the CDM component for Site Add or the Quick Create of Company with Site.

  Address attributes displayed on the page will be based on the country selected by the use.

  Since this release does not support Energy sites, all sites created will be associated with a company.

Criteria	***Details***
Match Rule Name	ECRM_SITE_ADD
Purpose	Search
Search Operator	Match All Attributes
Match Threshold Percentage	80%
Override Threshold Percentage	100%
Merge Threshold Percentage	N/A

- Person

  This match rule can also be used for Quick Create of Contact or Consumer.

Criteria	***Details***
Match Rule Name	ECRM_PERSON_ADD
Purpose	Search
Search Operator	Match All Attributes
Match Threshold Percentage	80%
Override Threshold Percentage	100%
Merge Threshold Percentage	N/A

Search Match Rules

Business Object Search criteria is linked to a DQM match rule.

Seeded date is supplied for these search match rules:

- Business Object Search for Company

Criteria	*Details*
Match Rule Name	ECRM_COMPANY_SEARCH
Purpose	Search
Search Operator	Match All Attributes
Match Threshold Percentage	80%
Override Threshold Percentage	N/A
Merge Threshold Percentage	N/A

Partner search uses the same rule as Company Search: ECRM_COMPANY_SEARCH

- Business Object Search for Site

Criteria	*Details*
Match Rule Name	ECRM_SITE_SEARCH
Purpose	Search
Search Operator	Match All Attributes
Match Threshold Percentage	80%
Override Threshold Percentage	N/A
Merge Threshold Percentage	N/A

- Business Object Search for Person

Criteria	*Details*
Match Rule Name	ECRM_PERSON_SEARCH
Purpose	Search
Search Operator	Match All Attributes
Match Threshold Percentage	80%
Override Threshold Percentage	N/A
Merge Threshold Percentage	N/A

- Business Object Search for Customer (Company, Site, Consumer)

Criteria	*Details*
Match Rule Name	ECRM_CUSTOMER_SEARCH
Purpose	Search
Search Operator	Match All Attributes
Match Threshold Percentage	80%
Override Threshold Percentage	N/A
Merge Threshold Percentage	N/A

- Business Object Search for Customer (Company, Site, Consumer) and Person

Criteria	*Details*
Match Rule Name	ECRM_ORG_PER_SEARCH
Purpose	Search
Search Operator	Match All Attributes
Match Threshold Percentage	80%
Override Threshold Percentage	N/A
Merge Threshold Percentage	N/A

- Additional match rules

Search	***Match Rule***
BO Search for Consumer with Person	Use the same rule as Person Search ECRM_PERSON_SEARCH
BO Search for Organization (Company, Partner, Site) with Contact	Use the same rule as Org with Person Search ECRM_ORG_PER_SEARCH.
BO Search for Consumer with Contact	Use the same rule as Person Search ECRM_PERSON_SEARCH
BO Search for Organization (Company, Partner) with Site	Use the same rule as Org with Person Search ECRM_ORG_PER_SEARCH
BO Search for Site/ Contact of a Consumer	Where one search is invoked use can be made of ECRM_ORG_PER_SEARCH. Where two searches are to be invoked use ECRM_COMP_SEARCH and ECRM_PERSON_SEARCH
BO Search for Site/ Contact of a Company/ Partner	Where one search is invoked use can be made of ECRM_ORG_PER_SEARCH. Where two searches are to be invoked use ECRM_COMP_SEARCH, ECRM_SITE_SEARCH and ECRM_PERSON_SEARCH

System Duplicate Identification Batch (SDIB) Match Rules

In addition to matching on name and address, the following attributes must match for the party to be identified as a duplicate in SDIB:

- SDIB Match Rules for Company
  - The Company's TIN must be an exact match
  - SetID
  - Party usage = *Company*
- SDIB Match Rules for Partner
  - The Company's TIN must be an exact match
  - SetID
  - Party usage = *Partner*

- SDIB Match Rules for Site
    - Company
    - SetID
    - Party usage = *Site*
- SDIB Match Rules for Person
    - SetID
    - NID, country and type

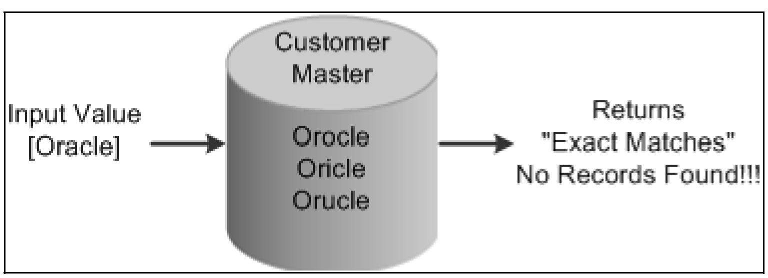
Additional match rules prevent duplicates when:

- Importing sales leads.
    - ECRM_SLS_LEAD_IMPORT_COMPANY
    - ECRM_SLS_LEAD_IMPORT_CONSUMER
    - ECRM_SLS_LEAD_IMPORT_CONTACT
- Creating financial accounts
    - ECRM_FIN_ACCT_COMPANY
    - ECRM_FIN_ACCT_PERSON

Smart Search

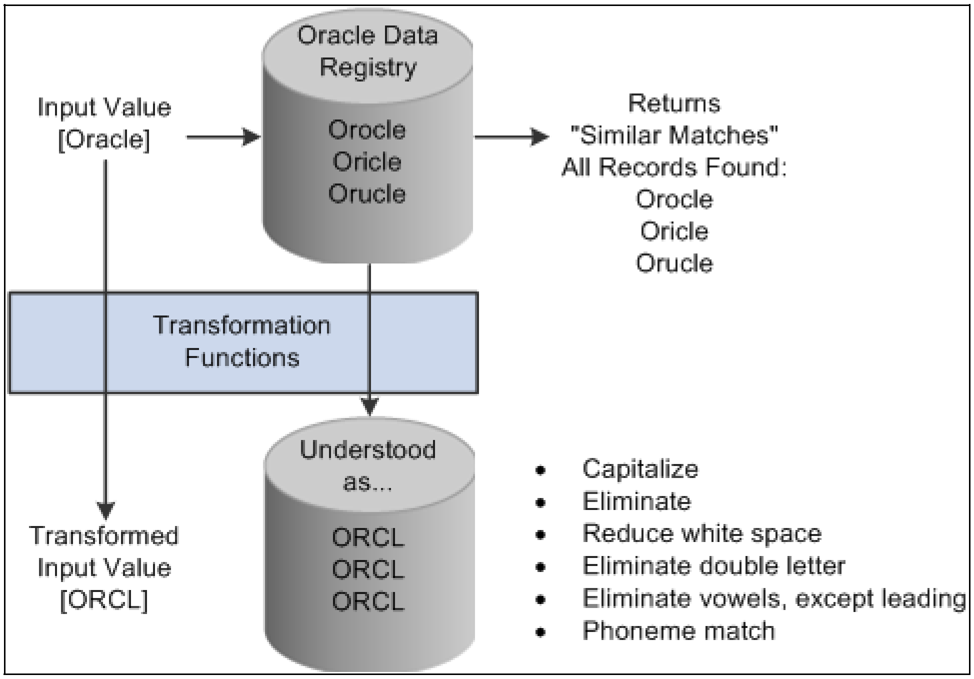
Smart Search is an advanced search mechanism provided in CDH, that identifies business objects like Customers and Contacts that are similar to the ones submitted in a search criteria, but not necessarily the same. This functionality can be referred to as *fuzzy searching*, where pre-defined logic contained in Match Rule definitions is used to display records that could potentially match the submitted search criteria.

This diagram illustrates the results of a search for exact matches:



Example of exact match search

This diagram illustrates the results using fuzzy searching:



Example of fuzzy searching

To support this functionality PeopleSoft CRM provides pre-built Match Rules of type *Search*, which are installed in CDH.

When a user performs a Smart Search, the system displays the matching records and a *Match Score* for each record. A Match Score is a percentage number which denotes how close a matching record is to what was searched for. For example, a record with a 90% match score is considered a closer match than one with an 80% match score.

All the Business Object Searches that are invoked from transaction pages have been enhanced to utilize the Smart Search mechanism of CDH. When a user performs a search operation with the smart search option turned on, the search is executed against the Hub.

Smart searching is only supported on advanced BO search pages and it is not applicable to basic BO search. When a user first looks up a business object, such as a customer, from a transaction, the basic BO search is used typically. If the search does not return any exact match, the user is then transferred to the Advanced Search page where smart searching is supported and additional search criteria can be entered to find the business object. The user can click the Advanced Search link on the main transactional page to perform advanced BO search. Other types of searches in CRM do not support smart searching.

For example, Customer Data Model component search pages, which use the *Configurable Search* mechanism have not been Smart Search enabled. Most CRM transaction components like Case, Opportunity, Order, Task and so on employ advanced BO searches and as a result enable smart search. The Customer 360 degree search screen also supports smart searching.

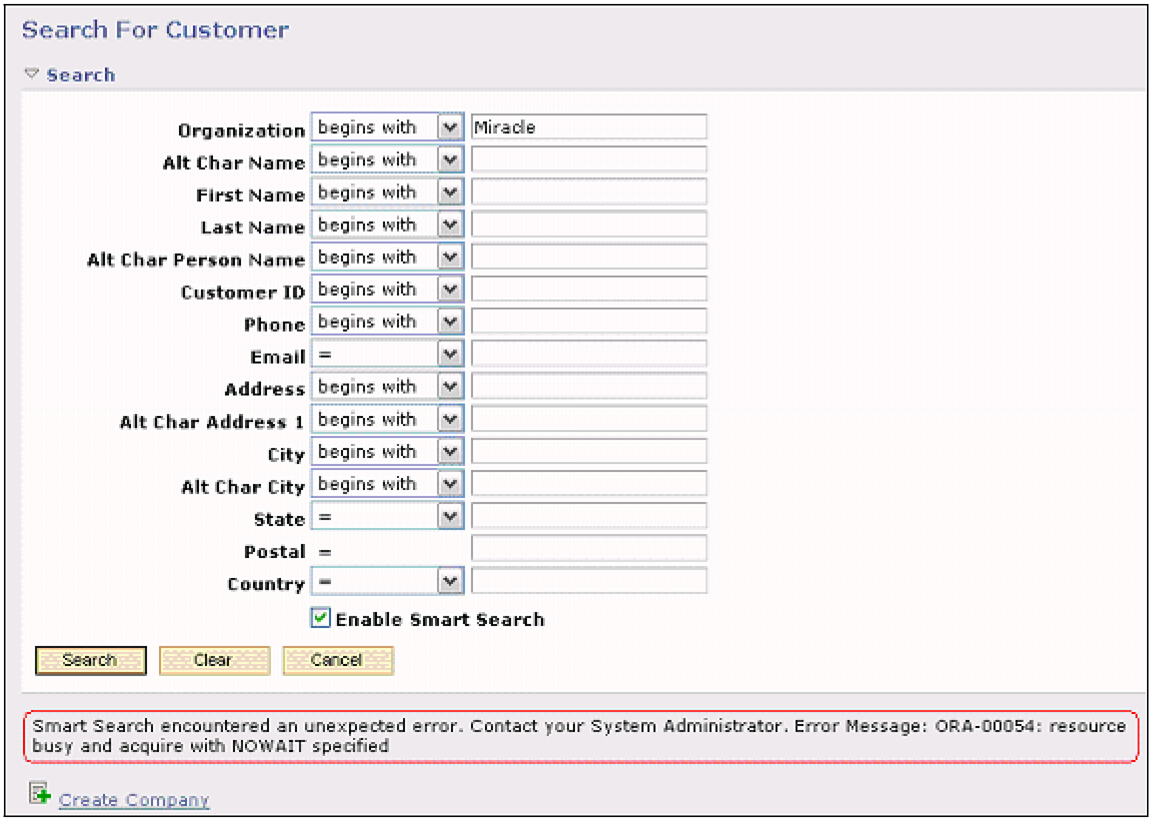
A Smart Search check box is provided on every advanced BO Search screen. This option is visible and defaults to selected if the following conditions are met:

- CDH is installed on the Installation page.
- Smart Search is activated on the CDH Installation page.
- Smart Search is activated on the BO Search Criteria page.

If checked, the CDH Smart Search is triggered on search execution. If unchecked, the search is performed against CRM.

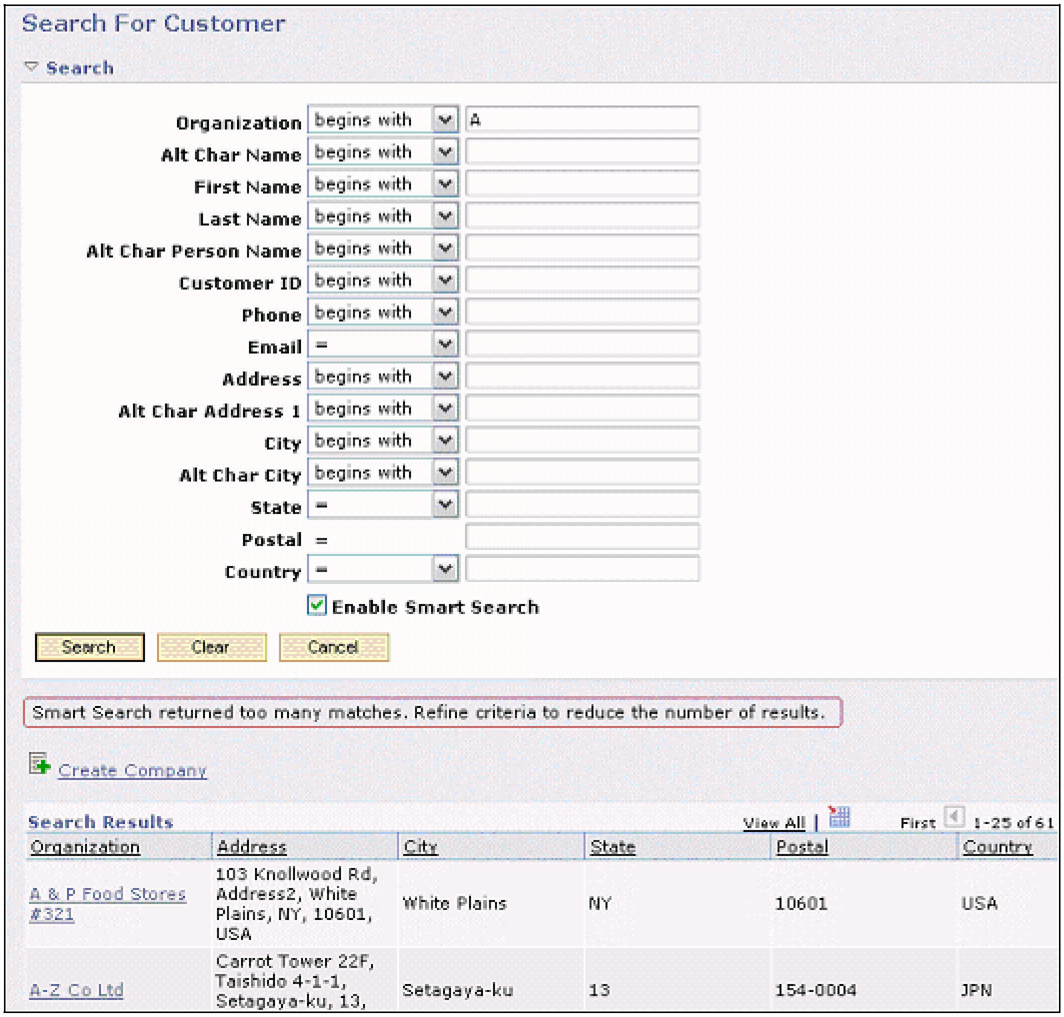
There are some instances when a search is done against CRM even if the Smart Search check box has been selected.

If the Customer Data Hub integration is temporarily unavailable, the search is done against CRM and a message is displayed to notify the user:



Example of Smart Search encountering CDH unavailability

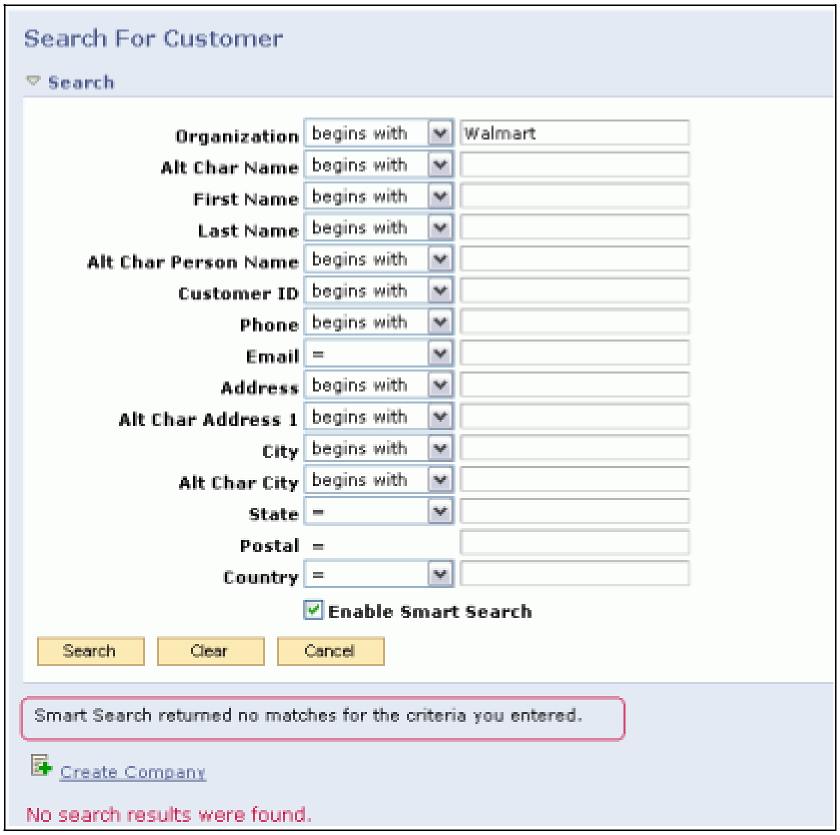
If the CDH Smart Search returns too many records due to a search criteria that is too broad, a message is shown, which suggests that the search should be refined to get meaningful results:



Example of Smart Search producing too many results

The number of results depends on the business object search setup under Set Up CRM, Common Definition, Customer, BO Search, Search Role.

Similarly, a message is displayed if the CDH Smart Search cannot return any search results based on the specified criteria:



Example of Smart Search returning no results

Understanding Data Merge

This section provides an overview of data merges and discusses:

- The merge process.
- The merge impact on a company.

Along with data consolidation and data enrichment, one of the main uses of the Customer Data Hub is *data cleansing.* Cleansing data means identifying duplicates introduced into the system and then blending duplicate records into a master record. This process is called a *Merge.* CDH can merge Parties, their relationships, and addresses to maintain clean data.

The CDH Data Librarian is responsible for submitting merge processes. *Merge Requests* are notifications sent to the Data Librarian by users and by an automated process, requesting potential duplicate parties in the system to be merged. These merge requests sit in the Merge Request Queue of the Data Librarian, awaiting review. PeopleSoft CRM users can also initiate Merge Requests from the Smart Search results. In this release, all Advanced BO search screens in CRM allow sending Merge Requests to CDH. Two or more search result records can be marked as *duplicates* and submitted to the CDH Data Librarian's Merge Request Queue. The Data Librarian reviews new Merge Requests and decides whether a merge is warranted. Before submitting a merge process, the Data Librarian chooses which of the parties will be the master record or *Survivor,* which attributes of the Survivor will be maintained, and which ones will be overwritten by values taken from one of the *Non Survivors.* On successful completion of the merge, the Non Survivors are inactivated.

De-duplication in CDH ensures that the master Customer record is kept accurate and up-to-date through the blending of attributes from duplicates into the master record. CRM data is also kept accurate as a result of this. Fragmentation of data belonging to the same customer is reduced, and this allows more accurate generation of reports.

Rules for Merging Business Objects

For PeopleSoft CRM data that is synchronized to CDH, certain validations are done to ensure that a merge in CDH would not cause inconsistencies in CRM. When any of these validations fails, the merge is not allowed to go through and error messages are returned. The list of validation rules are:

- Only Parties corresponding to business objects in the same setID can be merged.
- The business objects merged must be the same type.

  For example, a merge between an organization like a customer and an individual like a consumer is not allowed.
- Companies and Partners can be merged with one another.
- Consumers, Contacts, and Partner Contacts can also be merged with one another.

  For example, a person might be a consumer, and the same person might exists as a duplicate as a business contact. These two records could be merged with one of them designated the *Survivor.*
- Sites can only be merged with other sites provided that they belong to the same Company or Consumer.
- Workers cannot be merged with another worker.

  But a Worker can be merged with other persons like Consumers. The same rule applies to Persons of Interest, Student Admin Consumers, and Sales Users.

Interface for Requesting Merges

If Smart Search presents users with a list of potential duplicate customer, users can select two or more of the potential duplicates from the search results and submit them to the data librarian for merge evaluation. This functionality is available only when the Data Librarian functionality (part of Oracle CDH) is licensed.

The interface for submitting a merge request is the same in search pages that use PeopleSoft CRM configurable search functionality and pages that use BO search functionality.

System Limitations During a Merge

While a merge is in process, roles and relationships are deactivated and the business object is not found in BO Search results.

Data Handling for Merged Business Objects

When two business objects merge:

- The status of the objects remains *Active* even after a merge request has been sent to the Data Librarian. The Data Librarian processes the request and the necessary updates occur in CDH. Then an AE process is submitted to update the CRM data. At this point the status changes to *Merge In Process.* Once the merge is complete, the merge-to object is set to *Active,* and the non-survivors are set to *Inactive.*

- The names of the merge-from business object become alternate names for the merge-to business object. The merge-from object's primary name is assigned the new name type *Merged*.

Additional Considerations for Data Merges

The HZ:Default Profile Attributes for Merge Mapping is used to identify whether the Master Party Value or the Most Frequent Value is to be used for profile attributes. For the CRM implementation this must be set to Master Party Value.

The HZ: Default Secondary Profile Attributes for Merge Mapping is used to identify if a conclusive value is not found by the HZ:Default Profile Attributes for Merge Mapping. Set this value to be the same for both CRM and CDH.

National ID matching is based on the CRM primary NID value.

MERGE operator ID must be included in production as this is the ID used to stamp merged BOs. Users should not change the password.

Data that has had business objects replaced will no longer be visible on the merged-from business object.

Understanding the Merge Process

CDH performs a party merge that merges party information such as names, addresses, phones and so on. A CDH event is generated informing spokes of the merge and providing the merge-to and merge-from parties.

The party merge process consists of the following steps:

1. The Data Librarian submits a merge.

   The merge process in CDH completes by consolidating Survivor information and inactivating the non survivors.

2. CDH event notifies the CRM spoke of a merge and identifies the master BO.

   CRM receives information about the merge, such as Survivor, Non Survivor and other data.

   CDH merges party details.

3. CRM reacts by running *Merge Handlers* in the background. The Merge Handler for CDM merges corresponding records and attributes and rearranges relationships.

4. CRM inactivates the non-surviving business object and invokes the inactive customer EIP for SCM.

5. For successfully merged business objects, CDM initiates the merge routines for the applications.

Merge Handlers

A *Merge Handler* is a program in CRM that updates a set of specific database tables in response to a CDH Merge. Several Merge Handlers are provided as out-of-the-box system data.

Handlers are grouped by product area and further organized by the application transactions they are responsible for handling. A single Handler program manages all updates that are required for CDM. Separate Handlers exist to update individual application transactions like Case, Lead, Agreements, Orders and so forth.

Handlers are registered on the *Data Hub Merge Registry* page. Registered Handlers provided out-of-the-box cannot be modified or inactivated. However, additional handlers can be adding during implementation, to take care of customizations and product extensions that require tables to be updated. Handlers are designed to run in a particular sequence that is specified on the Data Hub Merge Registry page. For example, the application handlers run after the CDM handler. Some of the provided handlers send notifications to a specified role after they finish execution.

CRM Reaction to the Merge

The Merge Handler for CDM is responsible for merging CDM business objects. It performs the following activities:

- The Non-Survivor business object record is inactivated.

  Once inactivated, this business object cannot be updated and cannot be used on transactions.

- The Non Survivor's name is added to the survivor as an *alternate* name.
- When CRM data is synched to CDH, not all the attributes of a Business Object are synced. The attributes that are not synced are merged or blended into the Survivor record:
  - Non-blank attributes of the survivor are always retained. This is based on the *Primary Merge Rule* as defined on the CDH Installation Options page.
  - If the Survivor has a blank attribute, then it gets its value from the corresponding attribute of the Non Survivors. If there are multiple Non Survivors, then the *Secondary Merge Rule* selected in the CDH Installation Options page is used to decide which of the Non Survivors is used for attribute selection.
- All *roles* of the Survivor are retained. Unique, active roles of the Non Survivor are added to the Survivor.

  This result may vary depending on the merge rules defined on the CDH Installation Options page.

- All *relationships* of the Survivor are retained. Relationships of the Non-Survivor may be added to the Survivor depending on the action taken by the Data Librarian during the merge. The non-survivor relationship is end-dated on the non-survivor record which is now in a status of *Inactive.*
- *Contact methods* of the Non-Survivor may be added to the Survivor.

  This result may vary depending on the action taken by the Data Librarian during the merge.

Understanding the Merge Impact to a Company

This section provides an example of the merge impact to a company.

In this example, there are two customers – Johnson Inc. and Johnson Cars Inc.

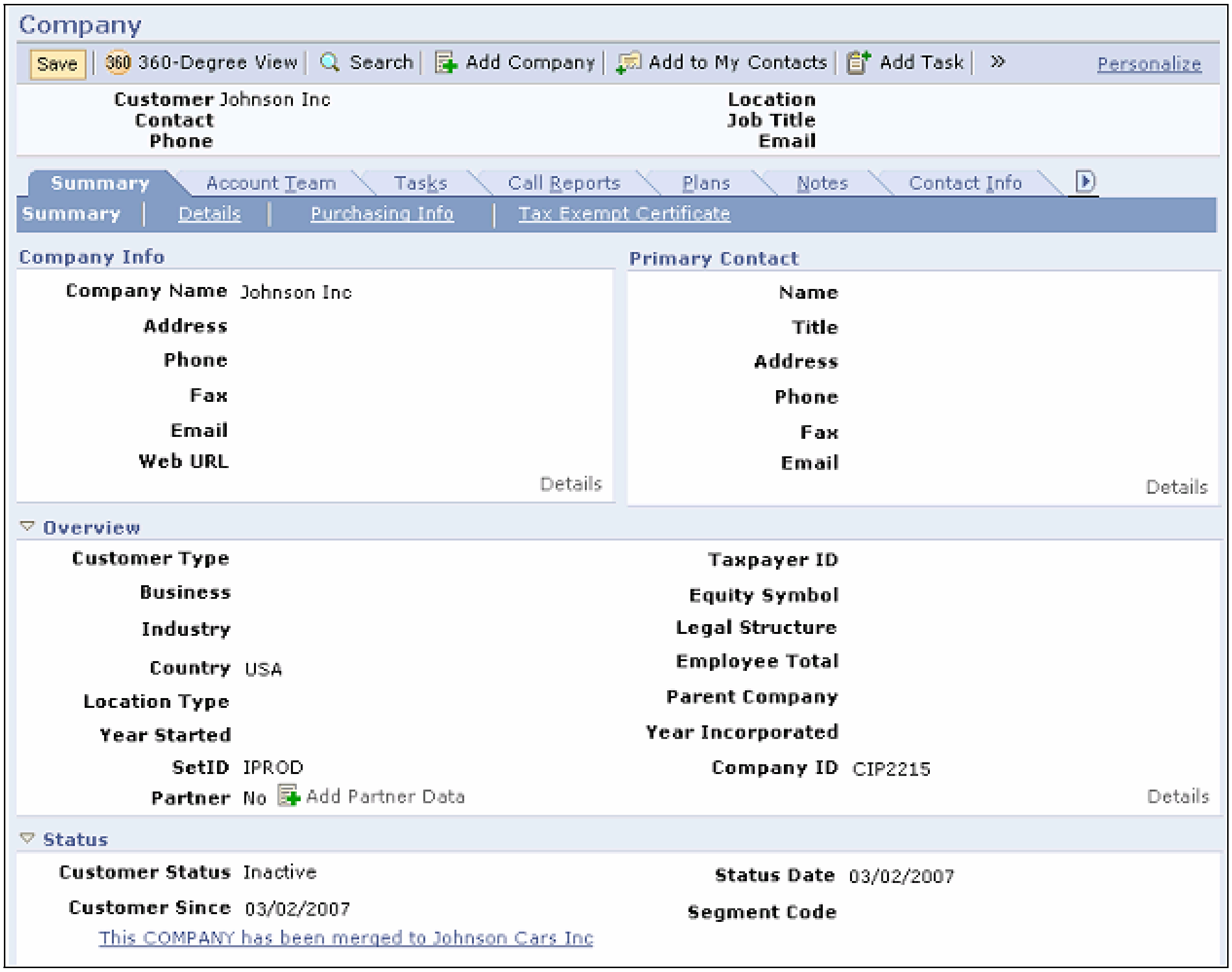
- Johnson Inc. has the Bill To, Ship To and Sold To roles, in addition to the Company role.

  Johnson Cars Inc. has only the Company role

- Tyson Bruno is a contact for Johnson Inc., while Calvin Dobbs is a contact for Johnson Cars Inc.
- The addresses for Johnson Inc. and Johnson Cars Inc. are not the same.

The Data Librarian merges these two companies, making Johnson Cars Inc. the *Survivor*.

Once the CDM Merge Handler runs successfully, Johnson Inc. is inactivated since it is the *Non Survivor*. This Company becomes *read-only* and can no longer be updated. A link is provided for the user to navigate to the *Survivor* company, which is Johnson Cars Inc.

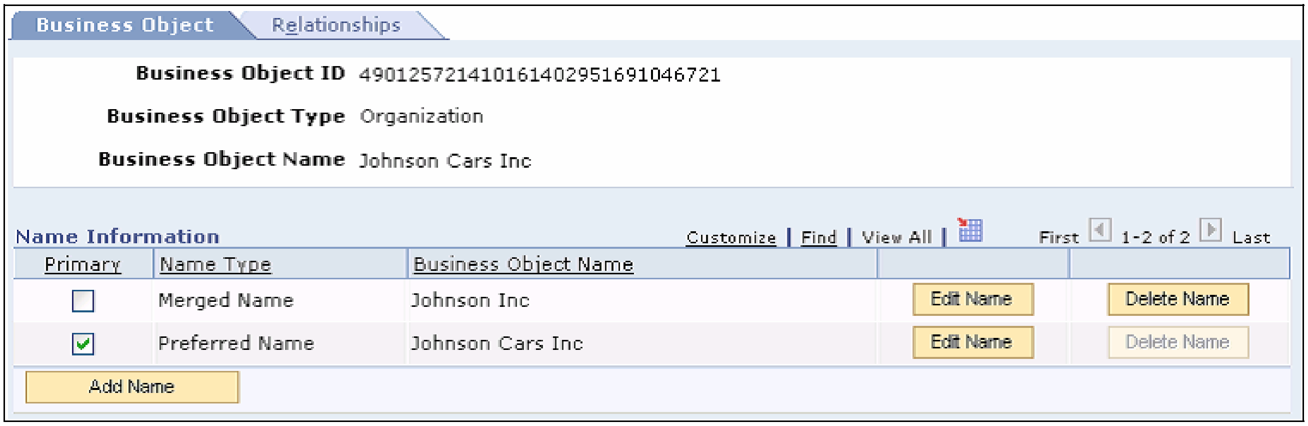


Example of a non-survivor inactivated after the merge

Click the This Company has been merged to <survivor component name> link to access the company component of the survivor. Note that the survivor component name that appears in the link label is the name of the final merge-to company. For example, if a company named *ABC* is merged to Company *ABD*, and Company *ABD* is later on merged to Company *ABE*, the link label that appears on the Company - Summary: Summary page of Company *ABC* (which is now inactivated) becomes *This Company has been merged to ABE*.

This link is available in the Person component as well with a person-specific link label, for example, *This Individual Consumer has been merged to <survivor component name>*.

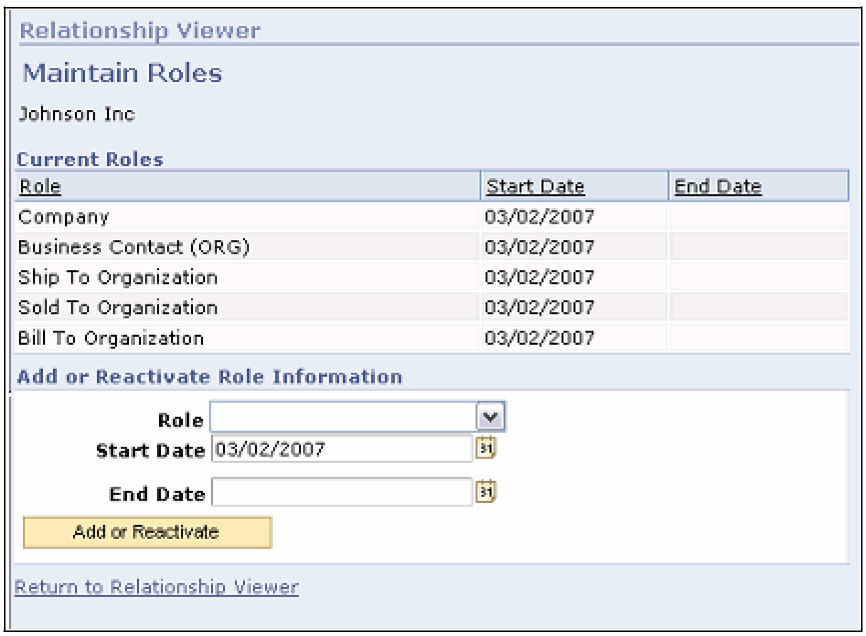
This page shows the survivor of the merge, Johnson Cars Inc.



Example of the survivor and non-survivor names after merge

Johnson Inc., the Non Survivor, has been added as a merged name to Johnson Cars Inc. If a user searches for Johnson Inc., the results will show Johnson Cars. Inc.

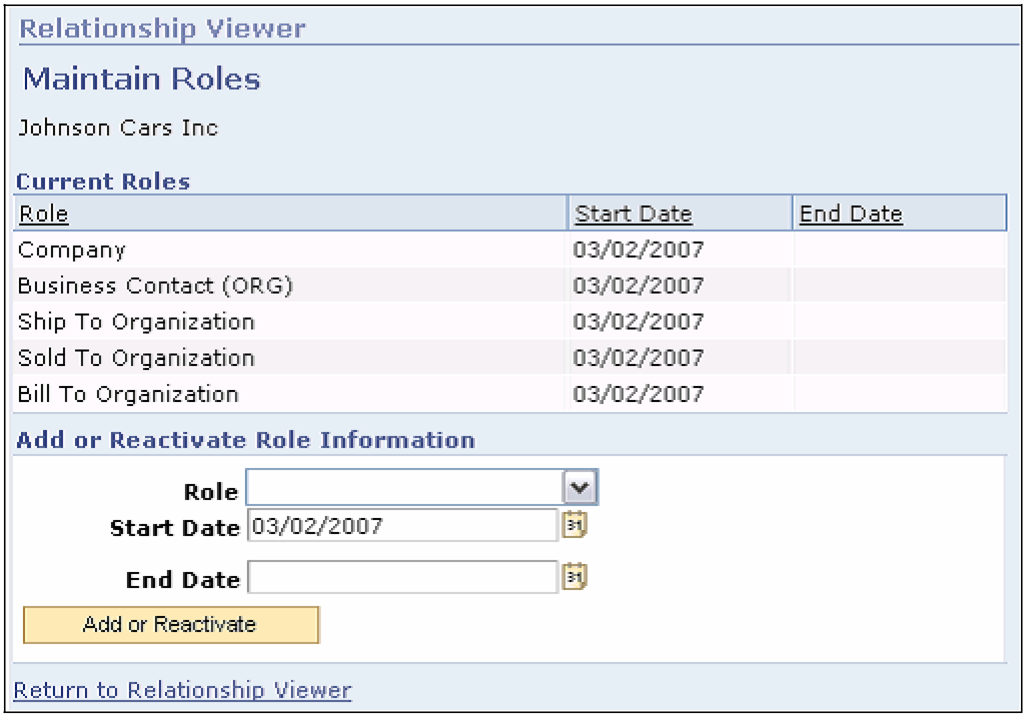
Prior to the merge, Johnson Inc. had the these roles:



Example of the Johnson Inc. roles prior to the merge

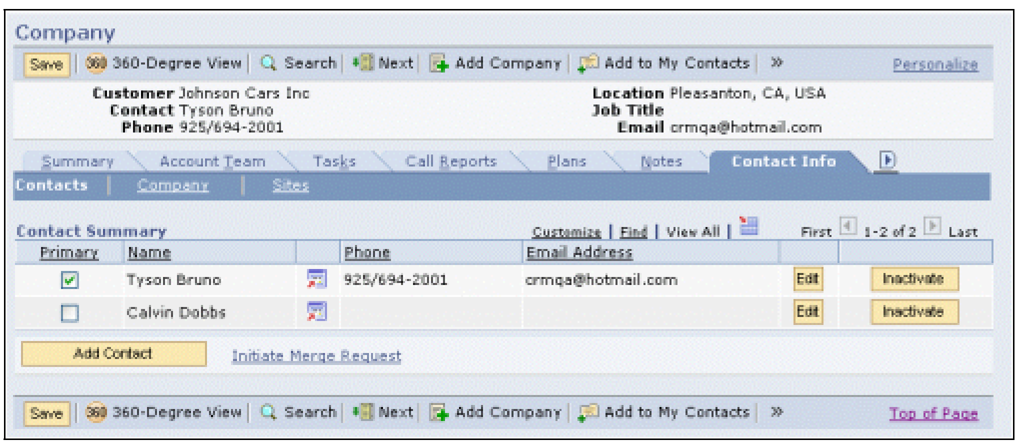
Johnson Cars Inc. had only the *Company* and *Business Contact (ORG)* roles.

After the merge, the *Ship To,Sold To*, and *Bill To* roles of Johnson Inc. have been added to Johnson Cars Inc.



Examples of roles for Johnson Cars Inc. after the merge

Tyson Bruno has a contact relationship with Johnson Inc. while Calvin Dobbs has a contact relationship with Johnson Cars. Inc. During the processing of the merge request in the CDH, the Data Librarian elected to append contacts from the non-survivor company to the survivor company. This page shows that both contacts are added to Johnson Cars Inc. record after the merge.

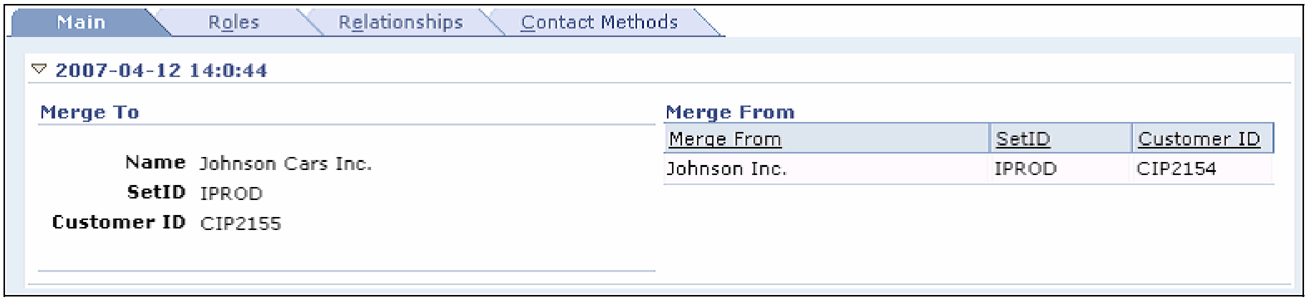


Example of contacts for Johnson Cars Inc. after the merge

After the Merge is complete, you can view the merge history from the Survivor component by clicking the View merge history for <survivor component name> link that is displayed in the Status section of the Company - Summary: Summary page. This link is available in the Person component as well.

Note. If the company you are currently viewing happened to be a survivor company in past merges but it becomes the non-survivor company in the most recent merge and has been inactivated, the link for viewing merging history is renamed to View previous merge history for <non-survivor component name> link.

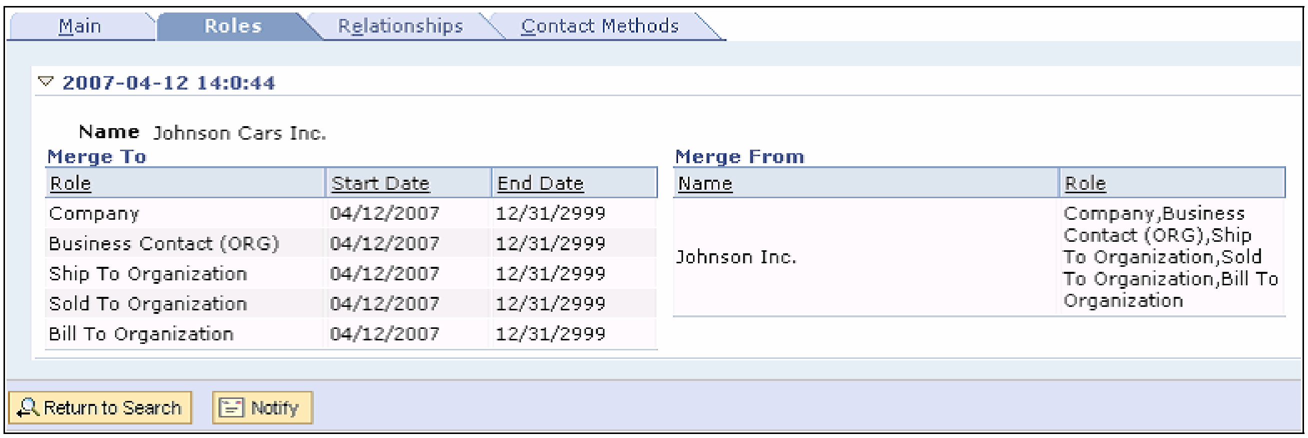
There are four tabs on the Merge History page: Main, Roles, Relationships, and Contact Methods. You can view detailed information about the merge on these pages.



Example of Main Merge History for Johnson Cars Inc.

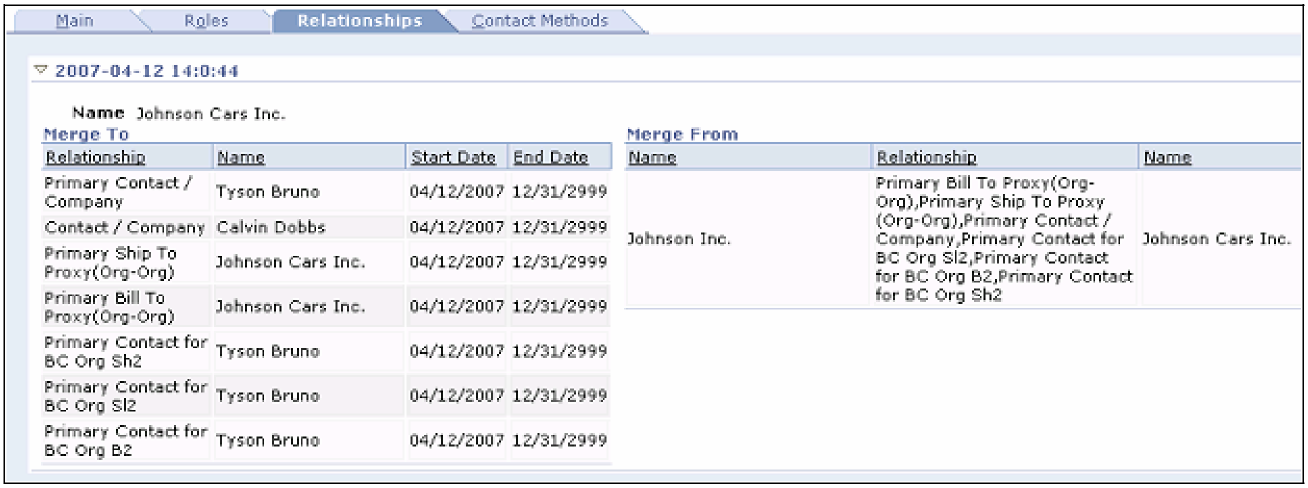
The Main tab shows the *Merge-From* or *Non-Survivor* business objects that were merged into the *Merge-To* or *Survivor*. In this case, Johnson Cars Inc. is the Survivor.

The Roles tab shows the merge history of the roles of the Survivor and Non-Survivor. New Ship To, Bill To and Sold To roles were added to the Johnson Cars Inc. from Johnson Inc.



Example of Roles Merge History for Johnson Cars Inc.

The Relationships tab shows a history of the merged relationships:



Main | Roles | Relationships | Contact Methods

2007-04-12 14:0:44

Name Johnson Cars Inc.

Merge To

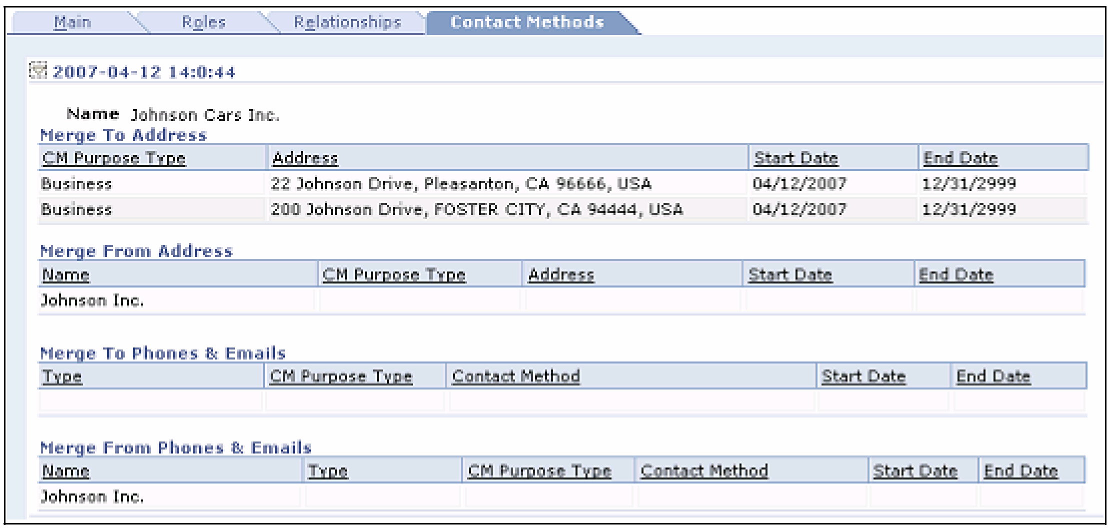
Relationship	Name	Start Date	End Date
Primary Contact / Company	Tyson Bruno	04/12/2007	12/31/2999
Contact / Company	Calvin Dobbs	04/12/2007	12/31/2999
Primary Ship To Proxy(Org-Org)	Johnson Cars Inc.	04/12/2007	12/31/2999
Primary Bill To Proxy(Org-Org)	Johnson Cars Inc.	04/12/2007	12/31/2999
Primary Contact for BC Org Sh2	Tyson Bruno	04/12/2007	12/31/2999
Primary Contact for BC Org Sl2	Tyson Bruno	04/12/2007	12/31/2999
Primary Contact for BC Org B2	Tyson Bruno	04/12/2007	12/31/2999

Merge From

Name	Relationship	Name
Johnson Inc.	Primary Bill To Proxy(Org-Org),Primary Ship To Proxy (Org-Org),Primary Contact / Company,Primary Contact for BC Org Sl2,Primary Contact for BC Org B2,Primary Contact for BC Org Sh2	Johnson Cars Inc.

Example of Relationships Merge History for Johnson Cars Inc.

The Contact Methods tab shows a history of the merged contact methods:



Main | Roles | Relationships | Contact Methods

2007-04-12 14:0:44

Name Johnson Cars Inc.

Merge To Address

CM Purpose Type	Address	Start Date	End Date
Business	22 Johnson Drive, Pleasanton, CA 96666, USA	04/12/2007	12/31/2999
Business	200 Johnson Drive, FOSTER CITY, CA 94444, USA	04/12/2007	12/31/2999

Merge From Address

Name	CM Purpose Type	Address	Start Date	End Date
Johnson Inc.				

Merge To Phones & Emails

Type	CM Purpose Type	Contact Method	Start Date	End Date

Merge From Phones & Emails

Name	Type	CM Purpose Type	Contact Method	Start Date	End Date
Johnson Inc.					

Example of Contact Methods Merge History for Johnson Cars Inc.

CDH Terminology

The following terms are used in this document:

Account The details of the deploying company's selling relationship with a particular Party.

Acquisition Attributes Used for selecting the initial, most relevant subset of records for matching, forming what is called the Work Unit.

Attribute	A column in a TCA registry. Attributes are used by DQM to construct match rules and identify potential duplicates.
Bulk Import	A Customer Data Hub (CDH) utility that uploads files containing customer data directly to the CDH and for duplicate prevention to be invoked in that process.
Custom Attributes	Match rules can be created for data that is not part of the delivered TCA records and fields. This can be achieved by using extensible attributes and creating them into custom attributes.
Customer	A party with whom the deploying company has a selling relationship, regardless of whether anything has actually been purchased or serviced.
Customer Data Hub (CDH)	A packaged solution that allows a deploying company to create a single, enterprise-wide customer database by consolidating customer information residing in different heterogeneous systems.
Data Quality Management (DQM)	A highly configurable duplicate identification engine.
Data Librarian	Within the deploying organization there is typically a single person or a team of people responsible for managing data quality. Oracle refers to this role as the Data Librarian. To facilitate this job role the Customer Data Librarian (CDL) application has been created, which combines the duplicate identification (DQM) and duplicate resolution (Party Merge) tools into a user-friendly html interface created specifically for individuals and teams responsible for an organization's information quality.
Duplicate	A record that a user has deemed a duplicate. In this case the duplicate record should be merged using Party Merge and if necessary Account Merge.
Extensible Field	TCA provides the ability to add attributes to the TCA that are not part of the delivered Oracle Record and Field data. This is achieved by creating an extensible field.
Master Record	The business object that is identified as the survivor in a merge.

Match Rules

Match Rules are used to determine if two parties are the same and should be considered a match. For example, you might want to setup a match rule that says: "If the party name, state and primary phone number exactly match, then the records should be returned as a match". Three types of Match Rules exist:

- Search Match Rules

  Used during searching to prevent duplicates from entering the system.

- Bulk Match Rules

  Used by the DQM to prevent duplicate records from entering the TCA through bulk import. They can also be used to identify duplicates with the TCA.

- Expanded Match Rules

  Used by DQM to identify existing duplicate records with the TCA.

Merge

An operation in which one entity (the merge-from entity) is mapped to another entity of the same type (the merge-to entity), then any child entities of the merge-from entity are transferred, copied, or merged to the merge-to entity. The merge-from entity is inactivated or deleted at the option of the user.

Merge-to

The business object that is identified as the survivor in a merge.

Merge-from

The business object that does not survive in a merge.

Merge Routine

Once a merge has been submitted and master business objects are identified either manually or due to a duplicate set exceeding automatic merge threshold, merge routines will determine how the business objects will be merged in the Customer Data Hub. CRM uses the same business object/party merge routines as the eBusiness Suite with the customer data hub. There are merge routines for the merge of PeopleSoft business objects and transactions within the CRM system.

Merge veto

After the merge is submitted, if merge veto rules are met by the business objects being merged then the merge of that duplicate set will be stopped. This is done in the customer data hub and is part of the merge routine.

Party

Party is an entity in the Trading Community Model that can enter into business relationships. A party is a person, organization (branch, subsidiary, legal entity, holding company) or relationship (a relationship between two parties).

Party Merge

The process of resolving duplicate TCA registry records. With the Party Merge feature you can consolidate duplicate parties, integrate an acquired party into another party, or consolidate duplicate party sites or contacts of a party in the TCA party registry. The related child entities that get merged or transferred include party relationships, contact information, party profiles, customer accounts, and information obtained from third-party sources.

Party Profile Fields
: Profile fields exist for both Organization and Person Parties. These fields include such things as the organization's or person's name, alias names, and address.

  SST is used for Party Profile fields to identify which data from which source to display to the user.

Potential Duplicate
: A record that might be a duplicate. The user needs to make the final determination if it is in fact a duplicate.

Profile Options
: Options which affect the operation of Oracle's TCA, such as the language to be displayed or whether special characters are enabled.

Scoring Attributes
: Used to calculate a score for each record in the Work Unit.

System Duplicate Identification Batch (SDIB)
: A process that can be run by the deploying company based upon the match rules that they have defined as relevant to their organization. This process evaluates the records in the TCA registry to determine which are potential duplicates of each other. Commonly used by Data Librarians to cleanse the customer database by identifying existing duplicate records.

Single Source of Truth (SST)
: SST allows the display of a single, blended customer in the CDH generated by data coming from all spoke systems. SST provides a mechanism to rank the data from different sources and identify the Single Source of Truth record that is presented to the user. SST is applied to Org and Person Profile Fields. Additionally, SST can determine if user entered data can overwrite existing third-party data in the Hub.

  The SST record represents a single view of the most accurate information about a party's profile.

Site
: Equivalent to a location.

Smart Search
: Smart Search integrates with various E-Business Suite applications to enable a deploying company to enhance party search screens using match rules of type *Search.* This improved method of searching the TCA registry applies DQM logic to return a list of similar records, catching records that are misspelled and/or aliased. In addition, the search fields exposed to the user can be configurable based on the match rule definition.

Source System Management (SSM)	SSM functionality maintains the mappings between records in the CDH and the spoke systems. The source system ID (OS) and well as the record ID (OSR) or the entity in the source system is mapped to the Registry ID of the TCA record. The TCA IDs belonging to the following records can be mapped: • HZ_PARTIESHZ_PARTY_SITES • HZ_CONTACT_POINTS • HZ_LOCATIONS • HZ_ORG_CONTACTS • HZ_ORG_CONTACT_ROLES • HZ_CUST_ACCOUNTS • HZ_CUST_ACCOUNT_ROLES • HZ_CUST_ACCT_SITES_ALL • HZ_CUST_SITE_USES_ALL
Thresholds	Thresholds are cutoffs that are used to exclude records that don't have high enough scores to be considered as potential duplicates. For example, you might want to set up a threshold that states: "If the total match score is less than 50, do not show the record as a potential duplicate". Match threshold: Records found with a match value, either % for search match rules or a numerical value for bulk and expanded searches, equal to or greater than the match threshold are considered to be a match to the input record. Override threshold: A record with a score equal to or above the override threshold can be prevented from entering the TCA Registry, because it is considered to be a match or duplicate of an existing record. To compute the override threshold, determine the minimum set of attributes required for two parties to match when a new record is being created. The total of the attribute scores of this minimum set is the maximum value for the override threshold. The override threshold must be more than or equal to the match threshold. Auto merge threshold: Records with a score equal or above this value are marked as candidates for merge without manual intervention.
Trading Community Architecture (TCA)	TCA stores information and relationships about a company's trading community, and is the core data model used by all E-Business Suite applications as well as the Oracle Customer Data Hub solution. It is the equivalent of the Customer Data Model.

Transformation Function

Transforms or changes attributes into different representations for the purposes of identifying potential duplicate records. They are helpful in instances where words are aliased or misspelled. Transformation Functions can call upon Word Replacement Lists.

- EXACT
    - Capitalize all letters
    - Remove non-alphanumeric characters
    - Reduce all white space to a single white space
- CLEANSE
    - Capitalize all letters
    - Remove non-alphanumeric characters
    - Reduce all white space to a single white space
    - Remove double letters
    - Remove all vowels, except leading vowels

Word Replacement Lists (WRL)

WRLs are word mappings that are treated as equivalents for matching. They help to standardize data where nicknames or abbreviations may have been used. They are optionally used by Transformation Functions. For example, you might want to map Robert, Rob, Robbie, Bob and Bobbie as all equivalent to one another for the purposes of matching.

Chapter 20

Setting Up CDH Integration

This chapter discusses how to

- Set up Installation options.
- Set up Smart Search and Duplicate Prevention options.

Setting Up Installation Options

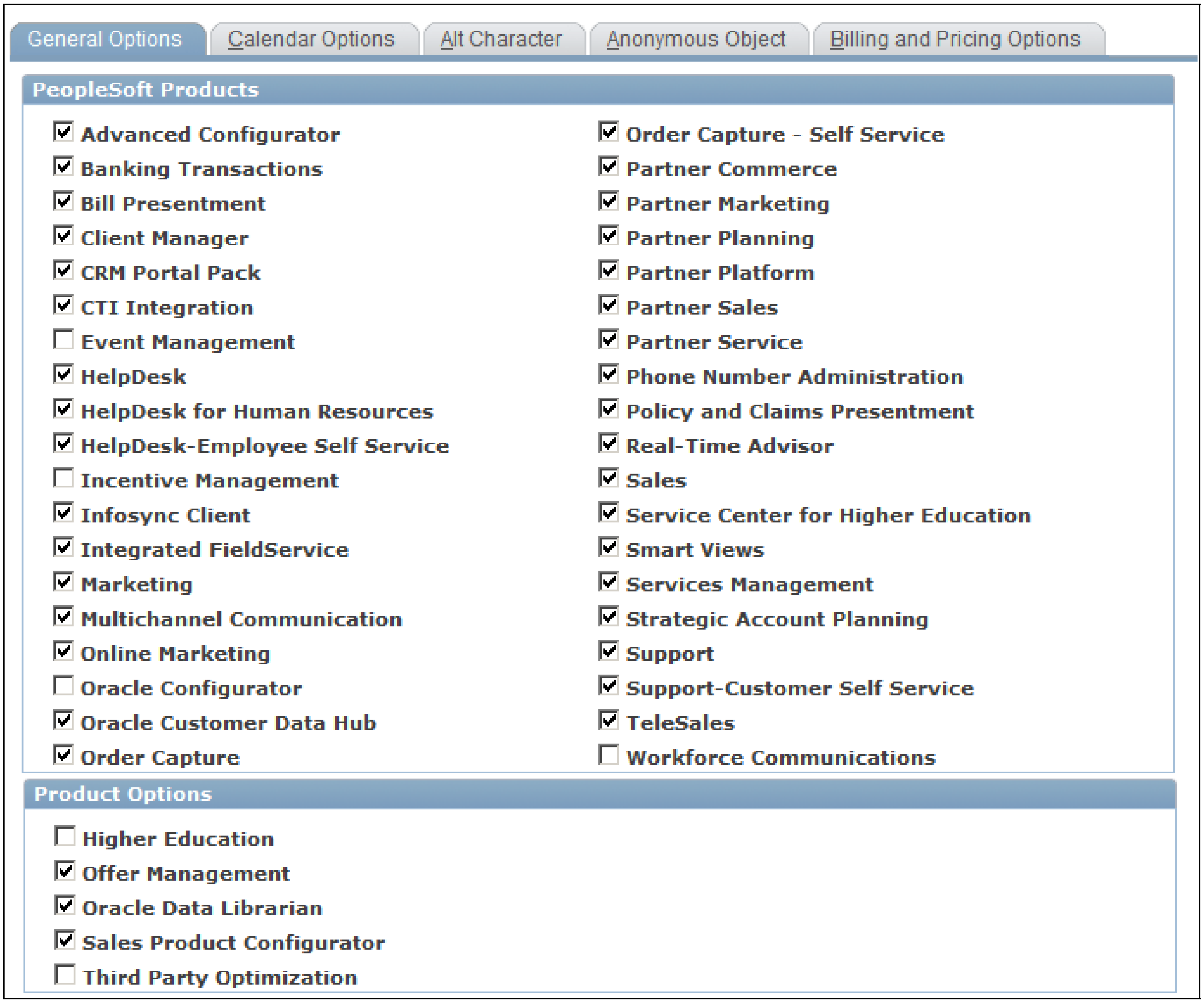
Use the following pages to set up the required installation options.

Pages Used to Set Up CDH Installation Options

Page Name	***Definition Name***	***Navigation***	***Usage***
General Options	RB_INSTALLATION	Set Up CRM, Install, Installation Options, General Options	Activate CDH and Data Librarian options.
CDH Installation Options	RDH_INSTALLATION	Set Up CRM, Install, Oracle CDH Installation	Use this page to select installation options for your PeopleSoft CRM.

Enabling CDH Integration

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



General Options page

Ensure that the Oracle Customer Data Hub and Oracle Data Librarian check boxes are selected.

Oracle Customer Data Hub

Select this check box to enable the Oracle Customer Data Hub (CDH) as a licensed product.

This will allow customer data to be synchronized between your PeopleSoft CRM applications and the Oracle Customer Data Hub.

Oracle Data Librarian

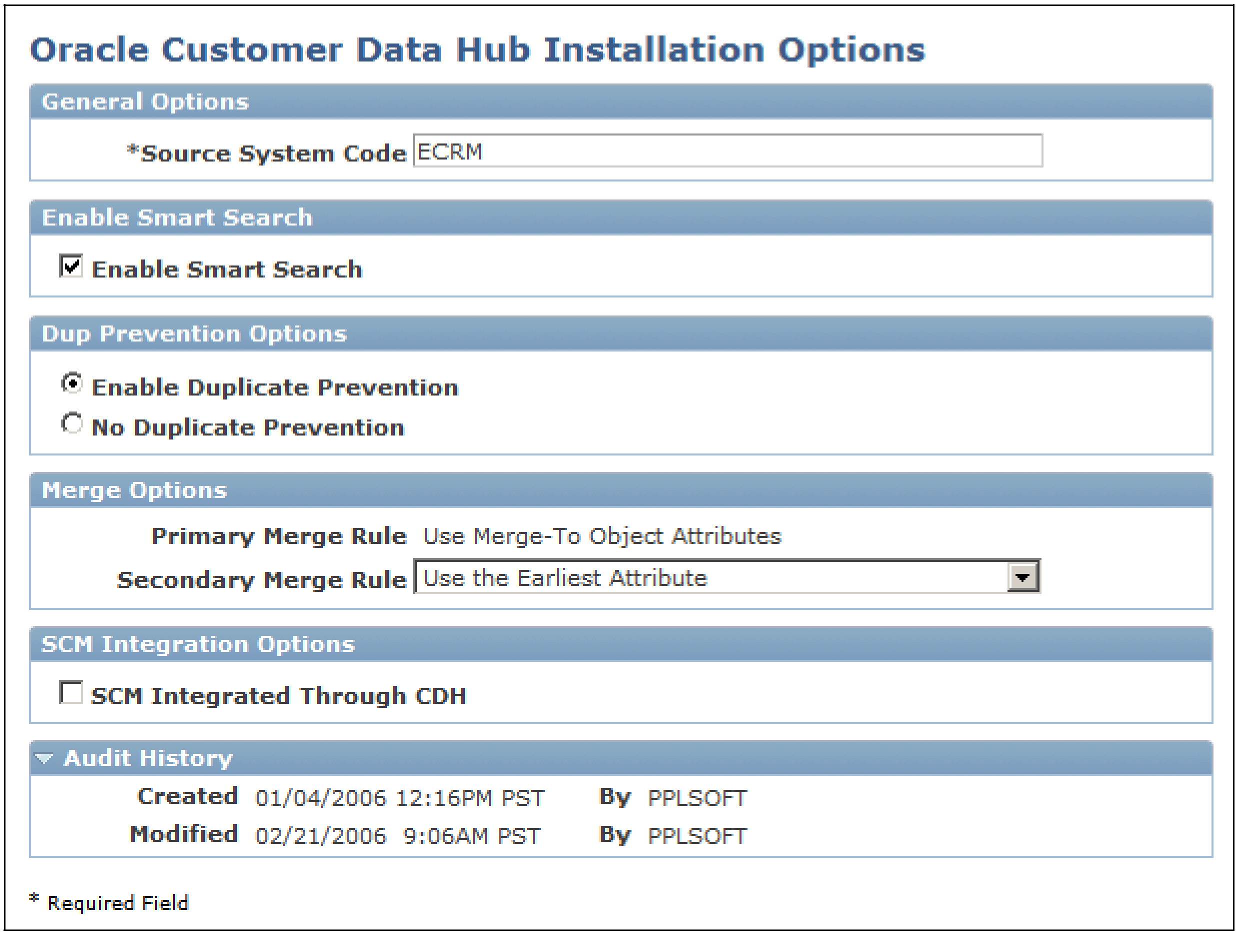
Select this check box to enable the Oracle Data Librarian as a licensed product.

This will allow PeopleSoft CRM users to initiate requests to merge duplicate customers: these requests will then be sent to the CDH Data Librarian's queue for evaluation.

See *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*

Setting Up CDH Integration Options

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



Oracle CDH Installation page

Source System Code

This is the code used by CDH to identify PeopleSoft CRM as a spoke. The default value is set to *ECRM.*

Enable Smart Search

Select this check box to enable the CDH smart searching functionality as an option on all the advanced Business Object (BO) search screens in CRM. If this check box is not selected, smart searching functionality is not available on advanced BO search screens.

Enable Duplicate Prevention

Select this radio button to allow the duplicate checking functionality of CDH to be invoked from Quick Create pages and Customer Data Model component pages that deal with adding new Business Objects.

Note. When this option is selected, the option for HZ:Enable Duplicate Prevention at party Creation must also be selected within the CDH system.

No Duplicate Prevention

Select this radio button if you do not wish to invoke the duplicate checking functionality of CDH from Quick Create pages and Customer Data Model component pages that deal with adding new Business Objects.

Primary Merge Rule and **Secondary Merge Rule**

Select the merge rules that describe how to handle the merge of attributes from two Business Objects that are tagged to be merged. These rules will be used to determine how to merge any attributes of objects submitted for a merge request that are not set during the execution of the merge within the CDH system. The Primary Merge Rule is always set so that if an attribute exists on the surviving Business Object, that attribute value will remain after the merge operation.

If the surviving Business Object had no value for an attribute prior to the merge but there was a value for that attribute on the non-surviving Business Object, the post-merge value of the attribute on the surviving Business Object will be taken from the non-surviving Business Object.

The Secondary Merge Rule specifies what should happen if the surviving Business Object had no value for a particular attribute prior to the merge, and two or more Business Objects that will be merged into the first Business Object do have a value for that attribute.

Select the *Use the Earliest Attribute* Secondary Merge Rule to instruct the system to use the value from the attribute that was created earlier than the corresponding attribute of all other candidates.

Select the *Use the Latest Attribute* Secondary Merge Rule to instruct the system to use the value from the attribute that was created later than the corresponding attribute of all other candidates.

For example, assume Business Object One had no value for the Ownership attribute, and was about to have Business Object Two and Business Object Three merged into it. If the Ownership attribute from Business Object Two was created on 12/31/2004, and the same attribute from Business Object Three was created on 12/31/2006, after the merge the surviving Business Object One would have the Ownership attribute's value set from Business Object Two if the *Use the Earliest Attribute* rule was in effect. Similarly, the surviving Business Object One would have the Ownership attribute's value set from Business Object Three if the *Use the Latest Attribute* rule was in effect.

SCM Integrated Through CDH

If this check box is selected, the Customer Sync Enterprise Integration Points (EIPs) for the CRM-SCM integration are disabled and the Hub is used as the integration mechanism. Select this check box if PeopleSoft FSCM is also a spoke of the Customer Data Hub.

Setting Up Smart Search and Duplicate Prevention

This section provides an overview of match rules and discusses how to:

- View CDH-imported match rules.
- View match rule details.

- View logs for imported match rules.
- Establish CDH and CRM field mapping for match rules.
- Specify match rule contexts.
- Enable smart search on business object searches.
- Set up merge processing rules.

Smart Searches and Duplicate Prevention utilize match rules to identify business objects that are similar to those being created or selected by the user.

Understanding Match Rules

Data Quality Match rules are used by the CDH to identify similar or potentially duplicate objects. A set of these rules is delivered as seeded data within the CDH system and as system data in the PeopleSoft CRM application. These system-delivered rules cannot be deleted or modified directly from within the PeopleSoft CRM system. However, if needed, additional rules can be defined in CDH and imported into the PeopleSoft CRM system. Match rules can be viewed on the Data Quality Match Rule – Summary page.

In order to utilize the Oracle Data Quality Match rules within PeopleSoft CRM, each rule is be mapped to one or more Match Rule field mappings. These mappings associate the Oracle application fields to their corresponding PeopleSoft fields. These mappings can be viewed on the Match Rule Mappings page.

Warning! Oracle delivers all necessary field mappings, and it is not necessary to change the mappings unless you have customized the underlying system. Use this component to review the delivered field mappings, but do not make changes to the delivered data without a thorough impact analysis.

Each Match Rule Mapping is associated with a context to specify the conditions under which that mapping is to be used. These rule contexts may be viewed in the Matching Context page.

How Match Rules are Used

Match Rules can be used to help prevent duplicate customer data entries and to help locate existing customer entries by using the following functionality:

- *Online Duplicate Prevention*

  When a user creates a new Business Object (BO) in the PeopleSoft CRM system, these match rules are invoked. Any resulting matches that exceed the match threshold are presented to the user as potential duplicates. The user can select one of the potential matches or proceed with the creation. If the override threshold is met or exceeded for a potential match, the user is required to use the matching BO and is prevented from creating a new BO. Online duplicate prevention is defined for Company, Partner, Site, and Person (Contact or Consumer) BOs.

- *Smart Search*

  Smart Search capability invokes the match rules to check for similar existing entries when a user searches for a Company, Partner, Site, Person or Customer. This provides two major benefits to the user. First, it allows the user to see entries that may not exactly match all the criteria typed by the user. For example, if the user searched for *Thomas Madison* but that person had been entered into the system as *Tom Madison* the CDH Smart Search logic will find the desired person as a possible match for the user to select. Secondly, when the search results are displayed, any results that exceed the match threshold are listed as potential duplicates, and the user can select two or more potential duplicates and submit them to the data librarian for merge evaluation.

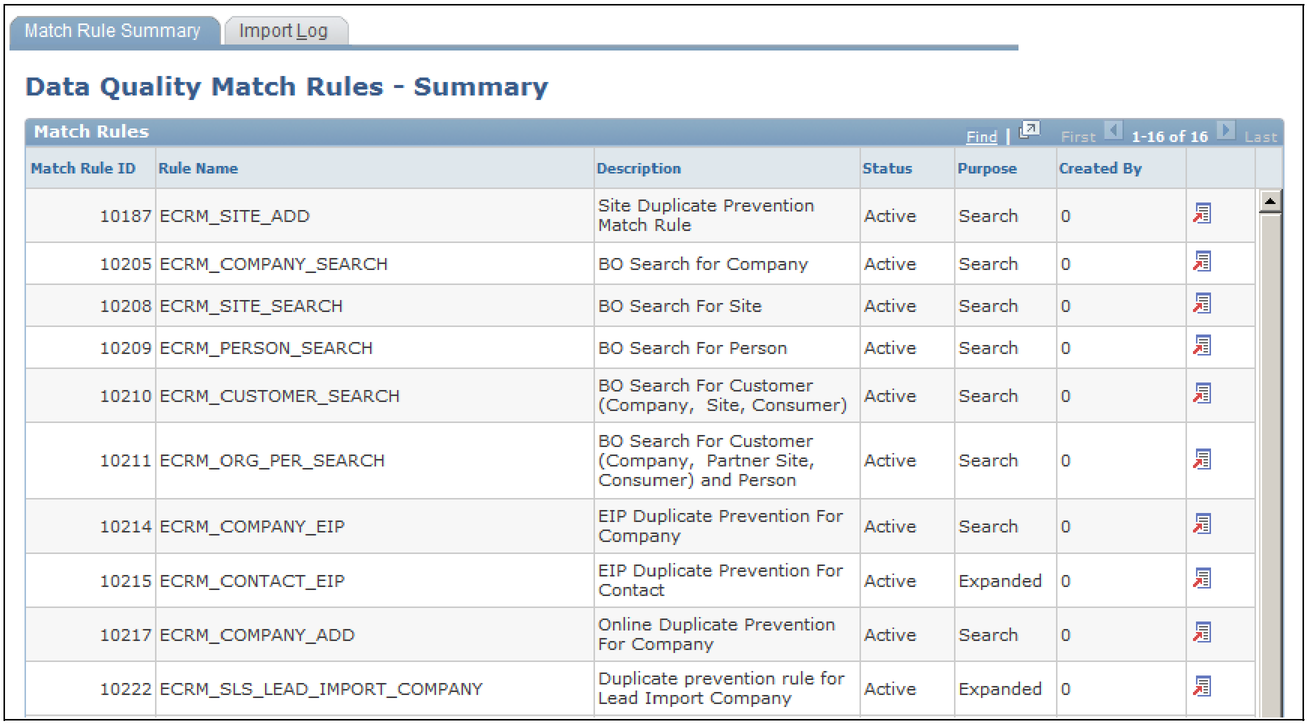
Pages Used to Set Up Smart Search and Duplicate Prevention

Page Name	***Definition Name***	***Navigation***	***Usage***
Data Quality Match Rule – Summary	RDH_MATCH_SUM	Set Up CRM, Common Definitions, Customer, Matching, DQM Match Rules Summary, Match Rules Summary	View Match Rules imported from the CDH.
Match Rule Details	RDH_MATCH_RULE_DET	Set Up CRM, Common Definitions, Customer, Matching, DQM Match Rules Summary, Match Rules Summary. Select View Details icon for desired rule in row of Match Rules summary grid.	View details for a Match Rule imported from the CDH.
Data Quality Match Rule – Import Log Summary	RDH_MATCH_SUM	Set Up CRM, Common Definitions, Customer, Matching, DQM Match Rule Summary, Import Log	View the import log for the selected Match Rule.
Match Rule Mapping	RDH_MATCHRULE_MAP	Set Up CRM, Common Definitions, Customer, Matching, Match Rule Field Mapping	Establish the mapping between CRM and CDH fields on a Match Rule.
Matching Context	RDH_MATCH_CONTEXT	Set Up CRM, Common Definitions, Customer, Matching, Matching Context	Establish the context to in which Matching Rules are to be used.
Criteria	RBQ_CRITDFN	Set Up CRM, Common Definitions, Customer, BO Search, Criteria	Specify the advanced search criteria fields and advanced search definition.
Adapter	RBQ_ADPTR	Set Up CRM, Common Definitions, Customer, BO Search, Adapter	Specify the basic search criteria fields.

Page Name	***Definition Name***	***Navigation***	***Usage***
Data Hub Merge Registry	RDH_MERGE_REG	Set Up CRM, Common Definitions, Customer, Merge Registry, Data Hub Merge Registry	View the Merge Handlers used to process merge information from CDH.

Viewing CDH-Imported Match Rules

Access the Data Quality Match Rule - Summary page (Set Up CRM, Common Definitions, Customer, Matching, DQM Match Rules Summary, Match Rules Summary).



Match Rule Summary | Import Log

Data Quality Match Rules - Summary

Match Rules — Find | First 1-16 of 16 Last

Match Rule ID	Rule Name	Description	Status	Purpose	Created By
10187	ECRM_SITE_ADD	Site Duplicate Prevention Match Rule	Active	Search	0
10205	ECRM_COMPANY_SEARCH	BO Search for Company	Active	Search	0
10208	ECRM_SITE_SEARCH	BO Search For Site	Active	Search	0
10209	ECRM_PERSON_SEARCH	BO Search For Person	Active	Search	0
10210	ECRM_CUSTOMER_SEARCH	BO Search For Customer (Company, Site, Consumer)	Active	Search	0
10211	ECRM_ORG_PER_SEARCH	BO Search For Customer (Company, Partner Site, Consumer) and Person	Active	Search	0
10214	ECRM_COMPANY_EIP	EIP Duplicate Prevention For Company	Active	Search	0
10215	ECRM_CONTACT_EIP	EIP Duplicate Prevention For Contact	Active	Expanded	0
10217	ECRM_COMPANY_ADD	Online Duplicate Prevention For Company	Active	Search	0
10222	ECRM_SLS_LEAD_IMPORT_COMPANY	Duplicate prevention rule for Lead Import Company	Active	Expanded	0

Data Quality Match Rule - Summary page (1 of 2)

Data Quality Match Rule - Summary page (2 of 2)

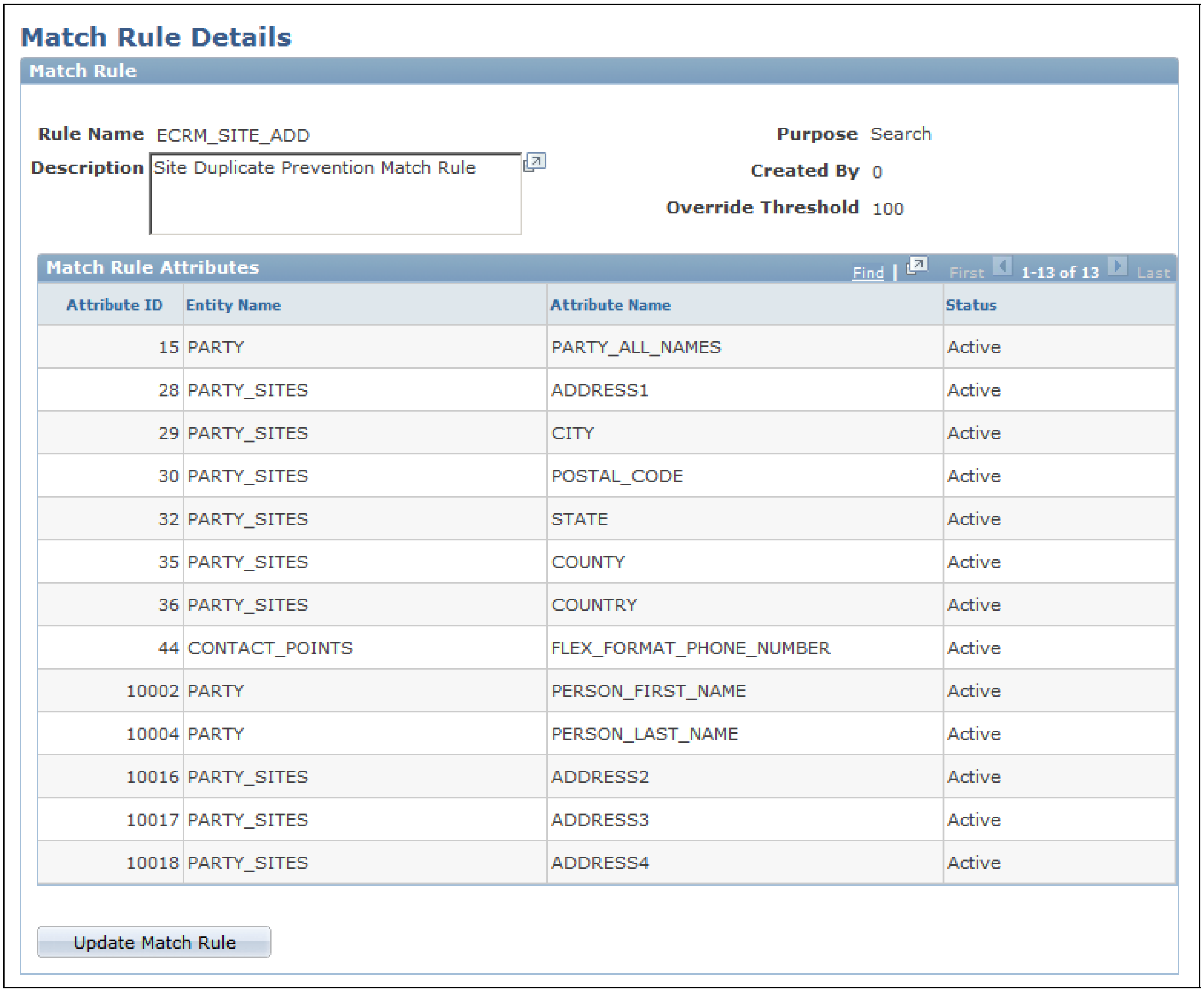
This page displays all the CDH Data Quality Match Rules that have been imported into the PeopleSoft CRM system.

Get All Match Rules Select this button to import all Data Quality Match Rules from CDH into the PeopleSoft CRM application.

Get Match Rule (Rule ID) Enter the ID of a CDH Data Quality Match Rule and click the adjacent Go button to import a specific rule from CDH into the PeopleSoft CRM application.

Viewing Match Rule Details

Access the Match Rule Details page (Set Up CRM, Common Definitions, Customer, Matching, DQM Match Rules Summary, Match Rules Summary).



Match Rule Details

Match Rule

Rule Name ECRM_SITE_ADD

Description Site Duplicate Prevention Match Rule

Purpose Search

Created By 0

Override Threshold 100

Match Rule Attributes Find | First 1-13 of 13 Last

Attribute ID	Entity Name	Attribute Name	Status
15	PARTY	PARTY_ALL_NAMES	Active
28	PARTY_SITES	ADDRESS1	Active
29	PARTY_SITES	CITY	Active
30	PARTY_SITES	POSTAL_CODE	Active
32	PARTY_SITES	STATE	Active
35	PARTY_SITES	COUNTY	Active
36	PARTY_SITES	COUNTRY	Active
44	CONTACT_POINTS	FLEX_FORMAT_PHONE_NUMBER	Active
10002	PARTY	PERSON_FIRST_NAME	Active
10004	PARTY	PERSON_LAST_NAME	Active
10016	PARTY_SITES	ADDRESS2	Active
10017	PARTY_SITES	ADDRESS3	Active
10018	PARTY_SITES	ADDRESS4	Active

Update Match Rule

Match Rule Details page

Use this page to view details of the attributes that are associated with a CDH Match Rule.

Override Threshold

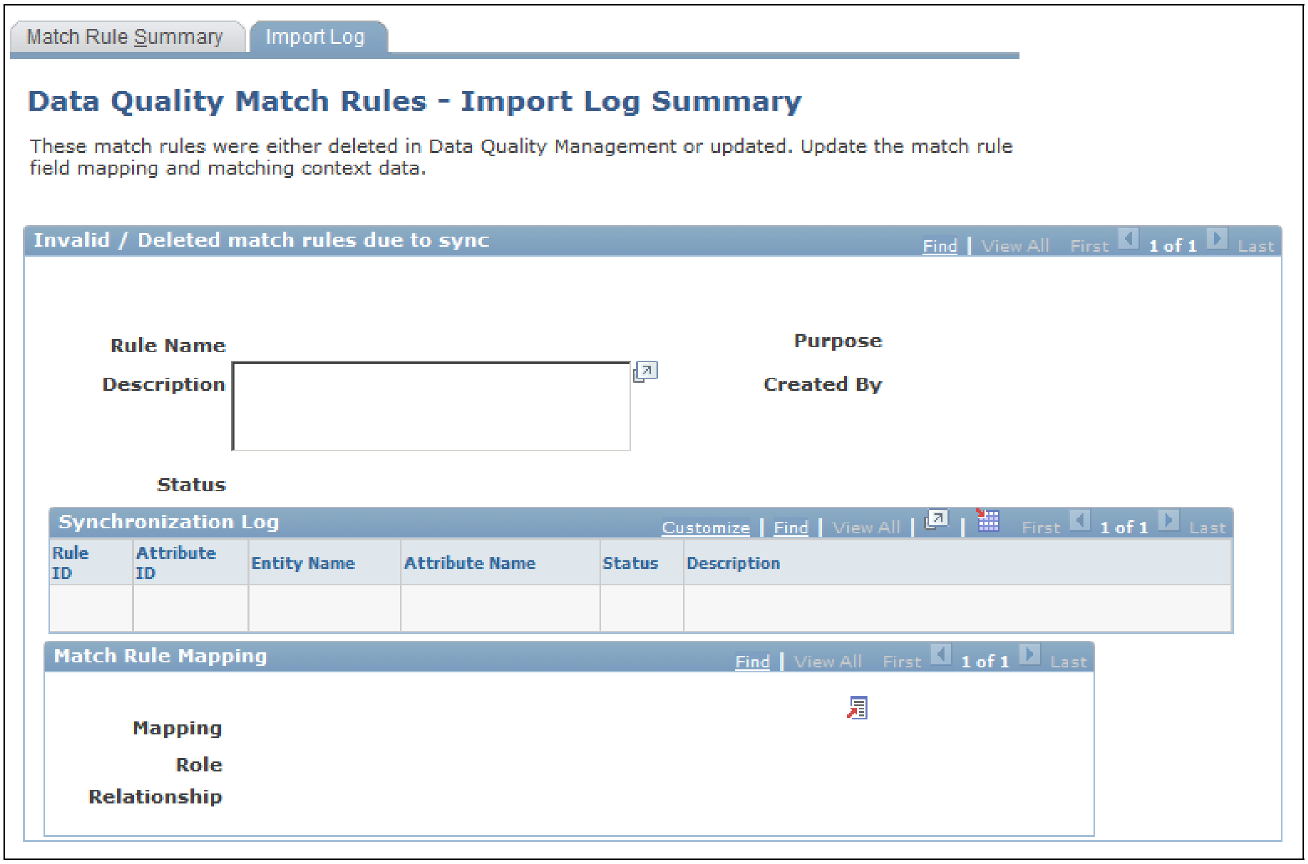
This displays the Override Threshold value defined for the rule within the CDH system. Override Thresholds can be defined in CDH for Match Rules used for searching. When a user in the PeopleSoft CRM system tries to create a business object using data that so closely matches an existing entry that the new object's match score would exceed the Override Threshold value, the system forces the user to select one of the existing close matches rather than allowing the new entry to be created.

Note. As delivered, the following four CDH Match Rules have Override Threshold values of 100%: *ECRM_SITE_ADD*, *ECRM_PERSON_ADD*, *ECRM_COMPANY_ADD*, and *ECRM_PARTNER_ADD*. These rules are used for creation of new business objects from the main CRM CDM components and from the BO Quick Create pages. These values may be adjusted when implementing the system based on business needs.

Update Match Rule Click this button to update the Match Rule with data from the Oracle CDH system.

Viewing Logs for Imported Match Rules

Access the Data Quality Match Rule - Import Log Summary page (Set Up CRM, Common Definitions, Customer, Matching, DQM Match Rule Summary, Import Log).

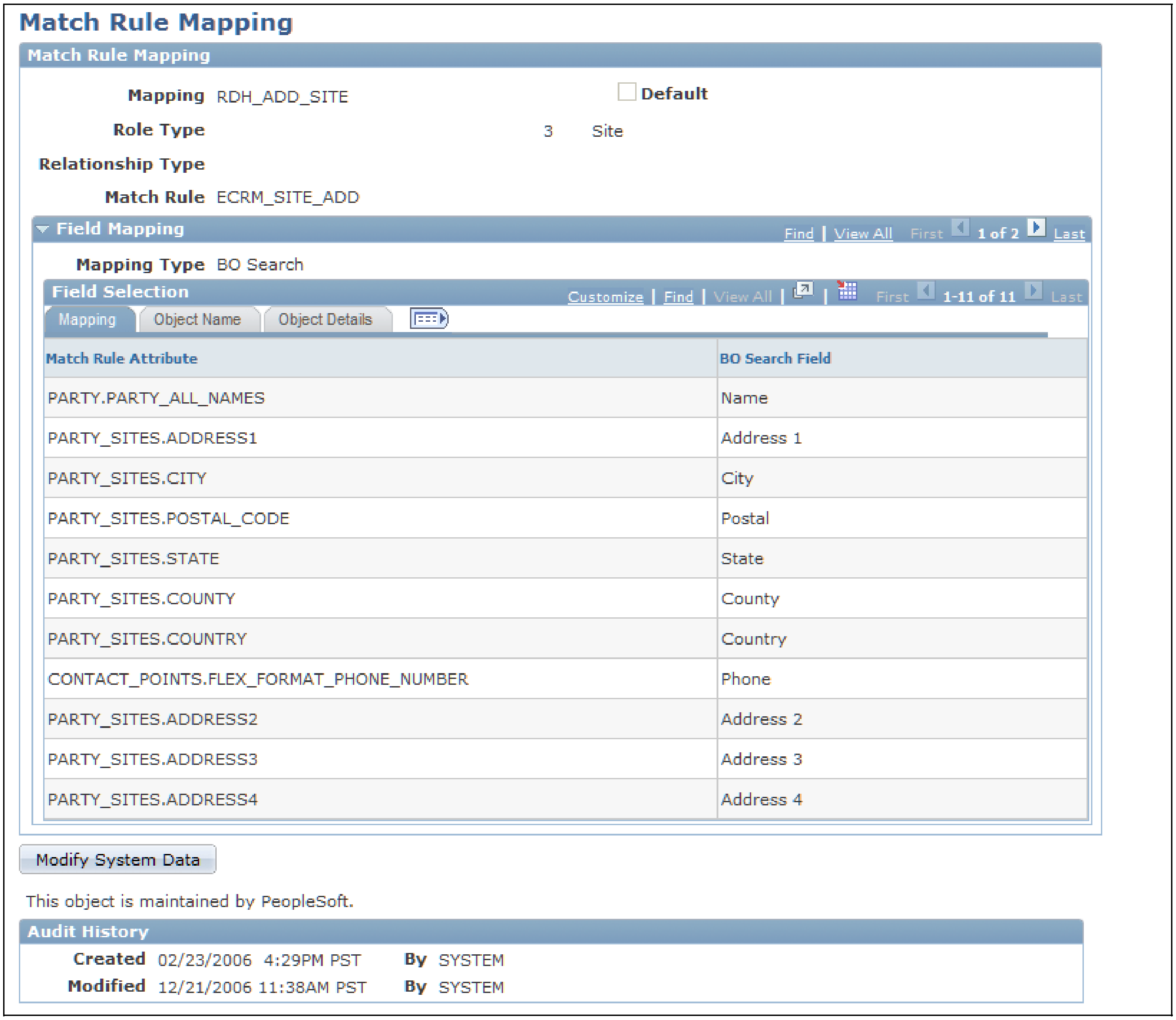


Data Quality Match Rule - Import Log Summary page

Use this page to view details regarding the status of deleted or invalid Match Rules. If a Data Quality Match Rule that is already used in a Match Rule Mapping is changed in the CDH, the corresponding Match Rule Mappings in the PeopleSoft CRM system must be updated to be adjusted for the new changes. This page helps identifies when such changes may be required due to updated CDH Match Rule data.

Establishing CDH and CRM Field Mapping for Match Rules

Access the Match Rule Mapping page (Set Up CRM, Common Definitions, Customer, Matching, Match Rule Field Mapping).



Match Rule Mapping page

Match Rule Indicates the CDH Data Quality Match Rule to which the map applies.

Role Type Indicates the BO Role Type for which the map applies. For example, if a Role Type of *Company* is used, the Match Rule Mapping will be used in situations in which the Business Object being evaluated also has a Role Type of *Company*.

See *PeopleSoft CRM 9.1 Business Object Management PeopleBook.*

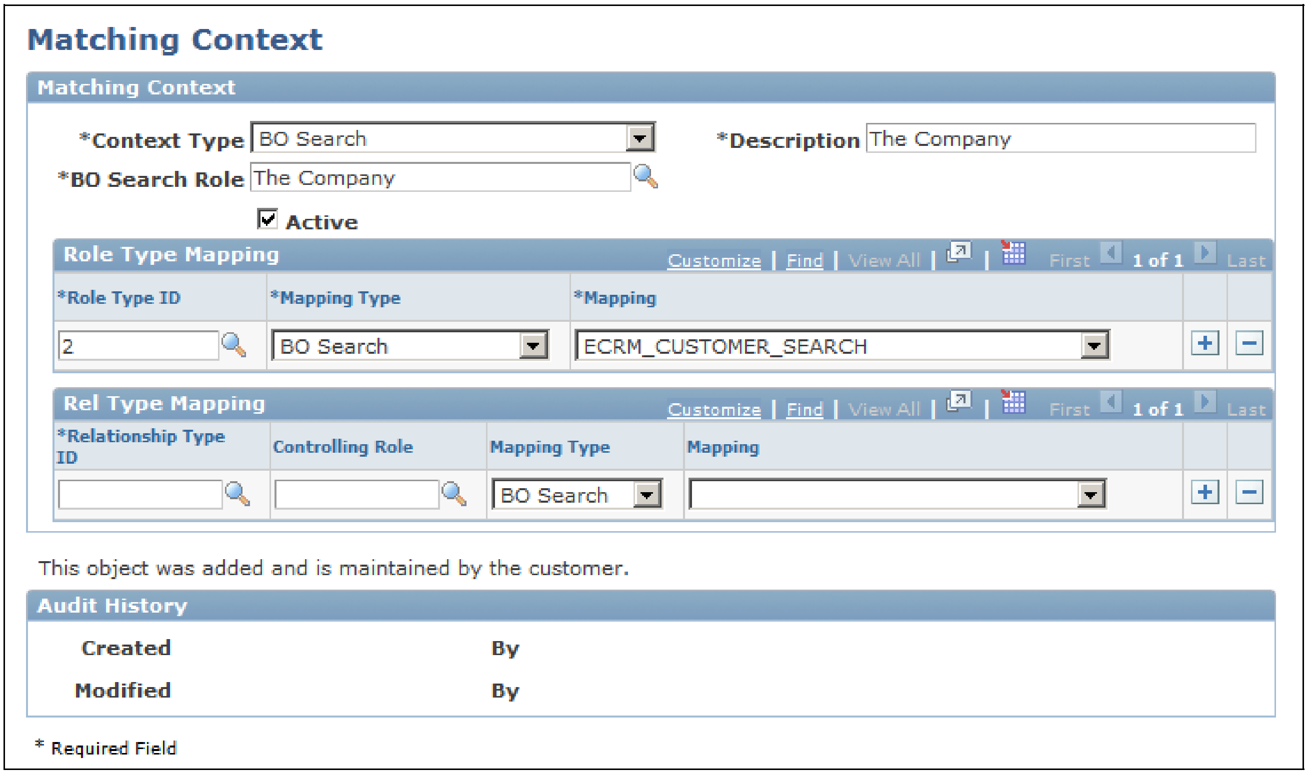
Relationship Type Indicates the BO Relationship Type for which the map applies.

Note. A mapping may only be created for a Role Type*or* a Relationship Type. You may not associate both a Role Type and a Relationship Type for a single mapping.

Mapping Type	Specifies the type of map that is being created. Valid values are *BO Search*, *Rowset,* and *Object.*
Match Rule Attribute	Lists each CDH Data Quality Match Rule attribute (table/field) used for the map. These are the attributes used to compare two or more entries for similarity and to evaluate whether a new entry might be a duplicate of an existing entry.
Record	Specify the CRM rowset record to be used in the mapping. This column only appears for mappings created with the Mapping Type of *Rowset.*
Field Name	Specify the CRM rowset field to be used in the mapping. This column only appears for mappings created with the Mapping Type of *Rowset.*
Property Name	Specify the CRM property to be used in the mapping. The available values will be derived from all the BO properties associated with the selected role type on the page. This column only appears for mappings created with the Mapping Type of *Object.*
BO Search Field	Indicates the PeopleSoft CRM BO Search field whose value will be compared to the equivalent CDH attribute when checking for duplicate or similar customer data entries. This column only appears for mappings created with the Mapping Type of *BO Search.*

Specifying Match Rule Contexts

Access the Matching Context page (Set Up CRM, Common Definitions, Customer, Matching, Matching Context).



Matching Context page

Use this page to specify contexts in which match rules can be used.

Enabling Smart Search on Business Object Searches

The BO Search - Criteria page and BO Search - Adapter page both contain options that control the Smart Search functionality.

To enable smart search on BO search:

1. Access the BO Search - Criteria page (Set Up CRM, Common Definitions, Customer, BO Search, Criteria).

   Select the Enable Smart Search check box to enable the Smart Search functionality for the associated BO search definition.

   Note. The Enable Smart Search button on the BO Search - Criteria page applies only to the specific BO Search definition displayed on the page. The Enable Smart Search button on the CDH Installation Options page controls whether Smart Searching is available in general for the PeopleSoft CRM system.

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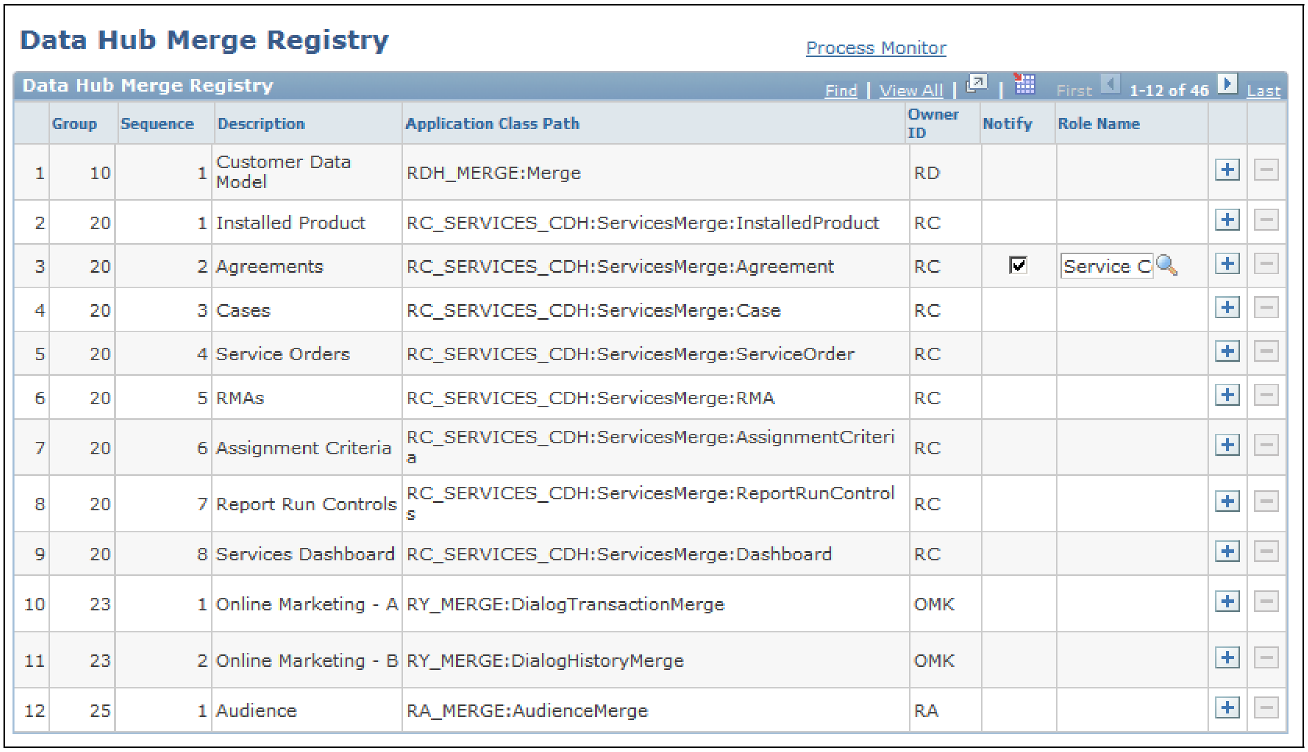
2. Access the BO Search - Adapter page (Set Up CRM, Common Definitions, Customer, BO Search, Adapter).

   Specify a role type in the Context Role Type field for which this adapter applies. This field will be visible if there is any data in the Matching Context page for the same component specified on the adapter definition. The available role types listed will be limited to those role types specified on the corresponding Matching Context page entry for that component.

Setting Up Merge Processing Rules

Access the Data Hub Merge Registry page (Set Up CRM, Common Definitions, Customer, Merge Registry, Data Hub Merge Registry).



Data Hub Merge Registry

Process Monitor

Data Hub Merge Registry — Find | View All | First 1-12 of 46 Last

	Group	Sequence	Description	Application Class Path	Owner ID	Notify	Role Name
1	10	1	Customer Data Model	RDH_MERGE:Merge	RD		
2	20	1	Installed Product	RC_SERVICES_CDH:ServicesMerge:InstalledProduct	RC		
3	20	2	Agreements	RC_SERVICES_CDH:ServicesMerge:Agreement	RC	☑	Service C
4	20	3	Cases	RC_SERVICES_CDH:ServicesMerge:Case	RC		
5	20	4	Service Orders	RC_SERVICES_CDH:ServicesMerge:ServiceOrder	RC		
6	20	5	RMAs	RC_SERVICES_CDH:ServicesMerge:RMA	RC		
7	20	6	Assignment Criteria	RC_SERVICES_CDH:ServicesMerge:AssignmentCriteria	RC		
8	20	7	Report Run Controls	RC_SERVICES_CDH:ServicesMerge:ReportRunControls	RC		
9	20	8	Services Dashboard	RC_SERVICES_CDH:ServicesMerge:Dashboard	RC		
10	23	1	Online Marketing - A	RY_MERGE:DialogTransactionMerge	OMK		
11	23	2	Online Marketing - B	RY_MERGE:DialogHistoryMerge	OMK		
12	25	1	Audience	RA_MERGE:AudienceMerge	RA		

Data Hub Merge Registry page

The Data Hub Merge Registry page displays entries that control how PeopleSoft tables are updated upon notification of a duplicate object merge. Use this page to view the post merge processing that must occur to update PeopleSoft data tables in response to a CDH object merge.

Group and **Sequence**

Numeric values used to order the execution of the code specified in the row's corresponding Application Class Path. Code is executed in ascending Group order using ascending Sequence order within a Group.

Application Class Path

Specifies the Application Class Path where the PeopleCode resides to perform the merge processing updates. For example, if a company with a BO_ID value of *123* was inactivated during a merge because that company was merged into a company entry with a BO_ID value of *456*, one type of update required for post-merge processing would be to update the BO_ID value on any transaction table entries that used to have a value of *123* to the new value of *456*.

Owner ID	Specifies the owner ID associated with the product that must be selected on the system Installation page in order for the code defined on that row's Application Class Path entry to be invoked. For example, if the Sales check box is not selected on the Installation page, none of the code on the Data Hub Merge Registry page marked with the Owner ID of RSF will be executed. (Technical administrators may view the fields on the INSTALLATION record within the PeopleSoft CRM database to see how licensed products correspond to Owner ID values.)
Notify	Select this check box to send a notification whenever the code specified on that row is executed.
Role Name	When a row's Notify check box is selected, all users with the role specified in the Role Name field will receive the associated notification.

Warning! All required values for the proper execution of post-merge processing are delivered as system data, and should not require any changes. Exercise caution before adding or deleting any rows on this page, and do so only after a thorough analysis of how this will affect the way objects in your PeopleSoft system will be updated. Such changes would normally only be done in response to a code customization.

Chapter 21

Integrating with the Customer Data Hub

This chapter discusses various ways in which the PeopleSoft CRM application integrates with Customer Data Hub (CDH), including:

- Using Smart Search.
- Submitting merge requests.
- Using Online Duplicate Prevention (ODP).
- Initiating full synchronization of PeopleSoft Customer Relationship Management (CRM) customer data with Customer Data Hub (CDH).

Using Smart Search

This section provides overviews of Smart Search and when to use it, and discusses how to work with Smart Search.

Understanding Smart Search

Smart Search is an advanced search mechanism provided by the CDH that identifies business objects similar to those submitted in the search criteria (in addition to identifying results that are exact matches). The advantage of this is that a user submitting *ABC Incorporated.* in a search would be able to see an entry for *ABC Inc.* in the search results. In this example, the *ABC Inc.* entry is likely to be what the user is searching for, even though it does not exactly match the user's search text.

To support searches in Smart Search, the CDH application uses fuzzy logic based on match rules. These rules determine how to identify match results that are similar to, but not exactly the same as the criteria entered into the match. This is accomplished through the use of:

- *Transformation functions*

  These functions instruct the search to ignore certain characteristics of the submitted search text. Examples of items that could be ignored include special characters (nonalphanumeric characters), *white space* (multiple adjacent blank spaces), and differences in capitalization.

- *Word replacement lists*

  Word replacement lists map multiple alternative words or abbreviations to a single standard item. For example, the name *William* could be mapped to *Will,Bill,* or *Billy.* Likewise, the abbreviation *Inc.* could be mapped to *Inc,Incorp.,* and *Incorporated.*

- *Match thresholds*

  Match rules allow match scores to be associated with the various attributes used in a search. For example, when searching for a person, you might define a match score for individual attributes such as first name and last name. You might define a match threshold to specify the minimum value that the submitted search text must reach to be considered a valid match.

Certain customer-related pages within PeopleSoft CRM now can invoke CDH smart searches. The search values from the user are passed to the CDH system, which performs the search and returns the results to the PeopleSoft CRM system. For setID-based objects, only results with the correct setID value for the given context are returned.

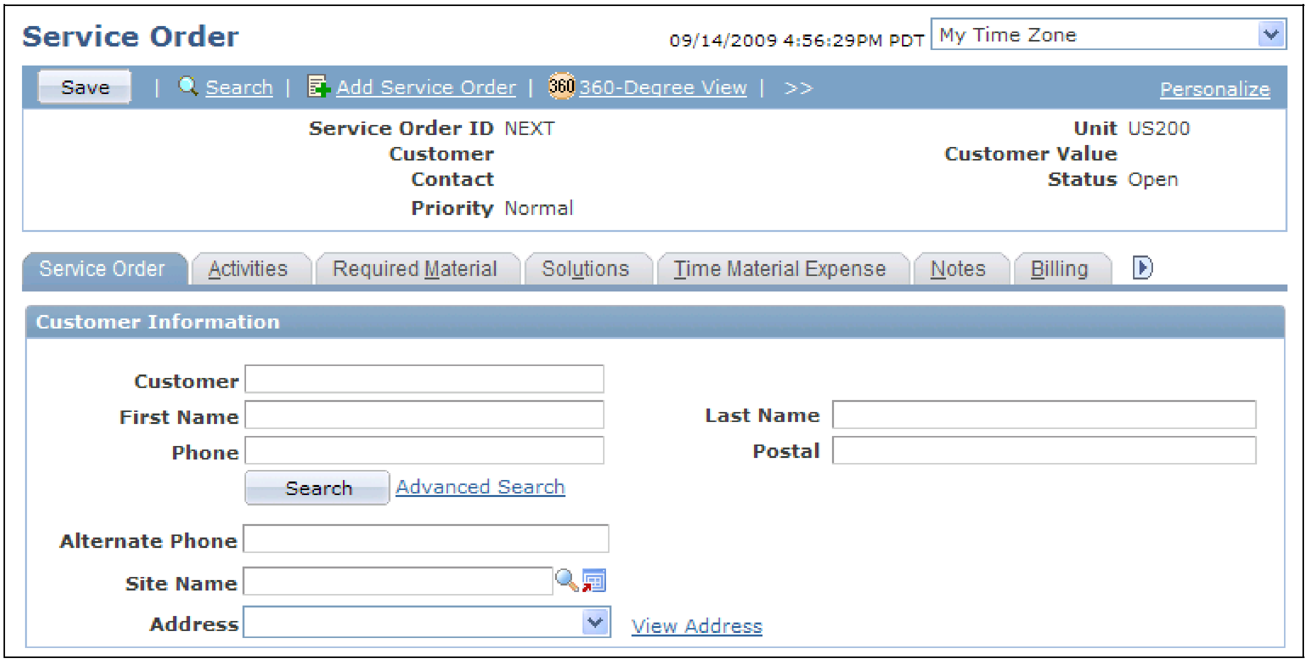
Note that preexisting PeopleSoft CRM business object (BO) searching and configurable search functionality has been maintained. The Smart Search capability represents an additional option that is available to the user to allow the execution of fuzzy logic searches against the CDH data.

Understanding Where Smart Search is Used

Smart Search functionality is available from the Advanced BO Search capability used on CRM transaction pages. To perform a Smart Search from one of these pages, the Enable Smart Search check box must be selected. Note that this check box appears only if Smart Search is enabled at the installation level within PeopleSoft CRM as well as for the definition of the particular BO Criteria page being used for that search.

There are two ways to access the Advanced BO Search page from a transaction:

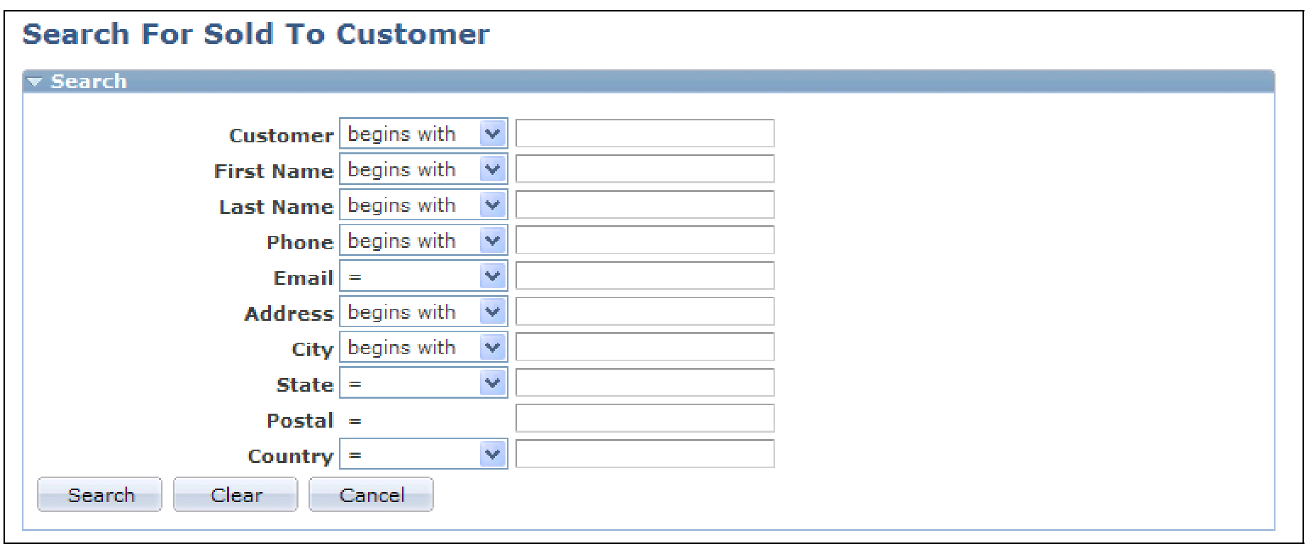
- Click the Advanced Search link.
- Click the standard Search button (or lookup icon) without entering any search criteria. In this situation, to avoid performing a search without any search criteria, you are directed to the Advanced Search page. If you are already on an Advanced Search page and initiate a search without specifying any search criteria, a message appears requiring you to enter some search criteria.



Transaction page with standard BO Search button and Advanced Search link

The Advanced Search page enables you to choose whether to invoke a Smart Search against the CDH data. By default, the Enable Smart Search button is visible and selected on Advanced Search pages, assuming that the system has been configured to allow Smart Search in the following way:

- The System Installation page has CDH enabled.
- The CDH Installation page has Smart Search enabled.
- The relevant BO Search Criteria page has Smart Search enabled.
- The Data Quality Management HZ:Enable DQM party Search profile option must be activated in the CDH system for Smart Search to be enabled in the PeopleSoft CRM system.



Advanced BO Search page showing Enable Smart Search option selected

To initiate a smart search that will look for data within the CDH system, select the Enable Smart Search check box, enter the desired search values for the other search fields on the page, and click the Search button. To do a local search against the data in the PeopleSoft CRM system, make sure the Enable Smart Search check box is deselected before clicking the Search button.

Note that in certain conditions, the result set from an Advanced BO Search may not include data from the CDH Smart Search even if the Enable Smart Search check box was selected. These conditions include:

- The CDH connection is down.

  If the connection to the CDH database is not active for any reason at the time that the smart search request is initiated from PeopleSoft CRM, the search is carried out as a normal advanced BO search within the PeopleSoft CRM system.

- The result set returned form CDH is too large.

  If the result set from the CDH Smart Search request returns too many rows to display, the search is carried out as a normal Advanced BO Search within the PeopleSoft CRM system. This typically occurs if the search parameters were too broad. For example, a smart search for all companies beginning with the letter *T* is likely to return a large number of results.

  The maximum number of duplicates to be returned is determined by a profile option that is set up in the Oracle application—HZ Maximum Number of Search Results. Customers need to set this up for the PeopleSoft CRM application, which uses it when displaying results for search and online duplicate prevention. This value should be greater than the value of results defined in the BO Search Role maximum results.

Note. Remember that smart search is available for the advanced BO searches that are initiated from transaction pages within CRM. Examples of such transaction pages are the Case, Service Order, and Opportunity pages.

Smart Search is *not* available from the search pages used to open and edit the main Customer Data Model (CDM) components themselves. These components to define CDM data continue to use the PeopleSoft Configurable Search capability. However, within a main CDM component, smart searches are available for associating secondary CDM objects. For example, from the main component used to define company (Customers CRM, Add Company), Smart Search is available to search for contacts to associate with that company. Similarly, from the main component used to define site (Customers CRM, Add Site), Smart Search is available to search for a company to associate with that site.

Working with Smart Search

This section describes how to use Smart Search to locate Customer Data entries. To illustrate the functionality, we will consider a situation in which two similar entries already exist in the CDH system, Manheim Inc and Mannheim Inc.

Assume the user creates a new service order and searches for *Mannheim Inc* without using the Smart Search option. The search is carried out against the customer data in the PeopleSoft CRM system, and a single exact match is returned. The user would be unaware of the existence of the *Manheim* entry, which may be the desired entry, or which may be a functional duplicate of the other entry.

However, if the user carried out a smart search using the same search text *(Mannheim Inc)*, the Search Results section would show both entries. Each result entry has an associated match score value, which indicates how closely it matches the submitted search criteria.

At this point the user can select one of the entries in the result set to continue with the transaction. For example, if the user selected the *Manheim* entry, the system would use that entry for the Customer value on the transaction page.

The smart search results can also be evaluated to initiate a request to merge two or more similar entries. For example, if the user realizes that the entries for Manheim Inc and Mannheim Inc shown in this example represent the same company, the user could click the Initiate Merge Request link at the bottom of the search page to send a request to CDH to have those two customer entries merged. More details on this procedure are available in the following section.

Submitting Merge Requests

This section provides an overview of merge requests and discusses how to:

- Work with merge requests.
- View merge exception logs.

Understanding Merge Requests

Merge requests are used to identify potentially duplicate entries of customer-related information. If a smart search returns multiple similar entries, a user can select two or more results and submit them as a merge request. These merge requests are then automatically sent to the CDH system for evaluation. The CDH Data Librarian will review all the merge requests and take action on those that are needed. Approved merge requests are processed within CDH to inactivate the duplicate entries and merge all appropriate CDH information from the inactivated duplicates into the surviving entry.

Certain restrictions apply for merging business objects. These restrictions ensure that a merge in CDH does not cause inconsistencies in CRM. The following rules apply for merge requests:

- Only business objects in the same setID can be merged with each other.
- Only business objects of the same type can be merged with each other. For example, a company cannot be merged with an individual consumer.
- Sites can be merged with other sites only if they both belong to the same company or consumer.
- When you merge person entries, the National ID values (if present) for all submitted entries must be the same.

  Note. The National ID entry value for person entries linked to the United States is typically the Social Security number of the individual.

- A worker cannot be merged with another worker. But a worker can be merged with persons defined as a contact or a consumer.
- A person of interest cannot be merged with another person of interest. But a person of interest can be merged with a person defined as a contact or a consumer.
- A student administrator cannot be merged with another student administrator. But a student administrator can be merged with a person defined as a contact or a consumer.

- A sales user cannot be merged with another sales user. But a sales user can be merged with a person defined as a contact or a consumer.
- When you merge companies, the Taxpayer Identification Number values (if present on an entry) for the submitted companies must be the same.

After a merge is successfully validated and carried out in the CDH, a notification is sent to the PeopleSoft CRM system. This notification includes details about which entry from the request was identified as the surviving object and which entry (or entries) became a nonsurviving object. Upon receiving this notification, merge handlers are invoked to adjust the data in the PeopleSoft system in response to the merge. Merge handlers are sets of code that are delivered with the system and specified on the Data Hub Merge Registry page. Merge handlers exist for both CDM data and CRM transactional data.

Between the time when the merge handlers are invoked for a particular merge request and when the handlers complete processing for that request, all the objects that are part of that merge request are given the merge status of *Merge in Progress.* BO searches from CRM transaction pages exclude entries with a merge status of *Merge in Progress* or *Inactive.* This prevents a new transaction from being associated with an object that is or may soon become inactive.

The PeopleSoft CRM merge handling begins with the invocation of the CDM Merge Handler. This handler is responsible for merging CDM business object data and performs the following activities:

- Retains all roles of the surviving object and adds unique, active roles of the nonsurviving objects to the surviving object.
- Retains relationships of the surviving object. End-dates relationships of the nonsurviving objects and adds them to the surviving object.
- Associates unique sites from the nonsurviving objects with the surviving object.
- Sets the customer status of the nonsurviving object to *Inactive.* Once inactivated, this business object cannot be updated and cannot be used on transactions.
- Adds the name of the nonsurviving object to the surviving object as an alternate name.
- Updates customer attributes that were merged as part of the process within CDH in CRM. Because PeopleSoft customer records include some additional attributes that are not sent to CDH, the handler merges these additional attributes according to the Primary Merge Rule and Secondary Merge Rule specified on the Oracle CDH Installation Options page. These rules operate in the following way:
    - The Primary Merge Rule specifies that nonblank attributes of the surviving object are always retained.
    - If the surviving object has a blank attribute, then its value is taken from the corresponding attribute of the nonsurviving object. If multiple nonsurviving objects exist, then the Secondary Merge Rule determines which attribute value of the nonsurviving object to use to update the surviving object. The Secondary Merge Rule can be configured to specify either that the earliest created attribute is used or that the most recently created attribute is used for this purpose.

After updating the CDM data, the system invokes the merge handlers for transactional data. The system updates the CRM transaction entries to change any references to the objects that just became inactive. For example, upon notification that customer *ABC* has been merged into *ABC Inc*, the system updates any existing CRM transaction, such as a sales opportunity, that referred to customer *ABC* to refer to customer *ABC Inc.* The transaction merge handlers ensure that:

- Foreign key references to nonsurviving business objects are changed to refer to the corresponding surviving object on all CRM transaction records.

- Information of the merge history is recorded and available for viewing on selected transaction components, such as the support case.

After the CDM and transactional data have been updated to react to the CDH merge notification, the merge status of the surviving business object is set to *Active*, and the nonsurviving objects are set to *Inactive*.

See and Chapter 20, "Setting Up CDH Integration," page 467.

The configurable search pages for the main CDM components (Customers CRM, Search Company, Customers CRM, Search Person,Customers CRM, Search Site) enable users to specify the merge status when issuing a search. Thus users can open and view entries for customer data objects that have already been merged and are therefore inactive. However, these inactive entries cannot be associated with new CRM transactions.

Pages Used to Submit Merge Requests

Page Name	***Definition Name***	***Navigation***	***Usage***
Merge History - Main	RDH_MERGE_MAIN	Open a customer object that has had other customer objects merged into it and click the View Merge History for <Customer object> link.	View the merge history of a business object.
Merge History - Roles	RDH_MERGE_ROLE	On the Merge History - Main page, select the Roles tab.	View the merge history role details for a business object.
Merge History - Relationships	RDH_MERGE_REL	On the Merge History - Main page, select the Relationships tab.	View the merge history relationship details for a business object.
Merge History - Contact Methods	RDH_MERGE_CM	On the Merge History - Main page, select the Contact Methods tab.	View the merge history contact method details for a business object.
Merge Log	RDH_MERG_EXCEPT_LG	Customers CRM, Merge Exception Log, Merge Log	View merge exception logs.

Working with Merge Requests

This section provides an example of how a merge request is created and how the PeopleSoft CRM system updates entries in response to a successful merge operation notification from the CDH. This example involves the discovery of a duplicate entry for a customer during the creation of a service order. Assume that the user enters *Mannheim* as the customer name in the advanced search page for the transaction.

After selecting the desired entries for the merge request, the user clicks the Mark Duplicates button to indicate that the entries are considered duplicates. A confirmation message appears to confirm that the merge request should be sent to the CDH.

Clicking the OK button submits the merge request to the CDH and returns the user to the previous business object search page (where the Initiate Merge Request link appears). The request is directed to the Data Librarian in the CDH for evaluation and processing. If the Data Librarian approves and completes the merge request, the CDH system sends a message to the PeopleSoft CRM system, which responds by updating the appropriate information as illustrated subsequently. Clicking the Cancel button cancels the merge request and returns the user to the previous business object search page.

Note. If the same merge request is submitted multiple times, only one request is processed and the duplicate ones are ignored.

To continue with the previous example, if the request to merge the *Mannheim* entry into the *Manheim* entry is approved and completed in the CDH, the data in the PeopleSoft CRM system is updated accordingly.

Note that prior to the merge request, both the *Mannheim* and the *Manheim* entries show up as active companies from the Company search page.

To see both entries after the completed merge request, you must modify the search to include entries for all Customer Status values. Notice that the customer status of the survivor entry *(Manheim)* is*Active* but the customer status of the nonsurvivor entry *(Mannheim)* is *Inactive*.

This is because the CDM entry for the nonsurviving company *(Mannheim)* is inactivated as soon as confirmation of the merge is received by the PeopleSoft CRM system.

Users can view the inactivated company entry for *Mannheim*, but the elements on the page are not editable. A link is visible on the Summary page to transfer the user to the surviving company entry. (In this example, the link has the text *This Company has been merged to Manheim Inc.*)

The Company Summary page for the surviving entry has an equivalent link to enable users to view the merge history of that entry.

In this example, the link displays the text *View merge history for Manheim Inc.* Clicking the merge history link of the surviving company opens the merge history component for that entry, which has four pages:

The Merge History **-** Main page shows the Merge To and Merge From entries.

The Merge History **-** Roles page shows the roles of the Merge To and Merge From entries.

The Merge History **-** Relationships page shows the relationships of the Merge To and Merge From entries.

The Merge History **-** Contact Methods page shows the contact methods of the Merge To and Merge From entries.

When you view the company contacts information on the main Company component for the surviving entity *(Manheim)*, the contacts from the nonsurviving company are visible in addition to the original (surviving) contacts.

Note. Contact methods are not displayed on the Person record of nonsurvivors. The system adds an end date to inactivate contact methods for nonsurvivors and they are no longer viewable on the Contact Info page of the Person component.

When you view the Business Object information for the surviving entry, the name of the nonsurviving entry is visible as an alternate name. This ensures that searches using the nonsurviving name correctly retrieve the surviving entry.

For example, if a new service order is created after the merge of the two companies and the user searches for the company using the spelling of the nonsurviving entry *(Mannheim)*, the system retrieves the correct current entry.

This example illustrates how the entry for *Manheim* has been retrieved in response to entering *Mannheim* in the Customer field and performing the search.

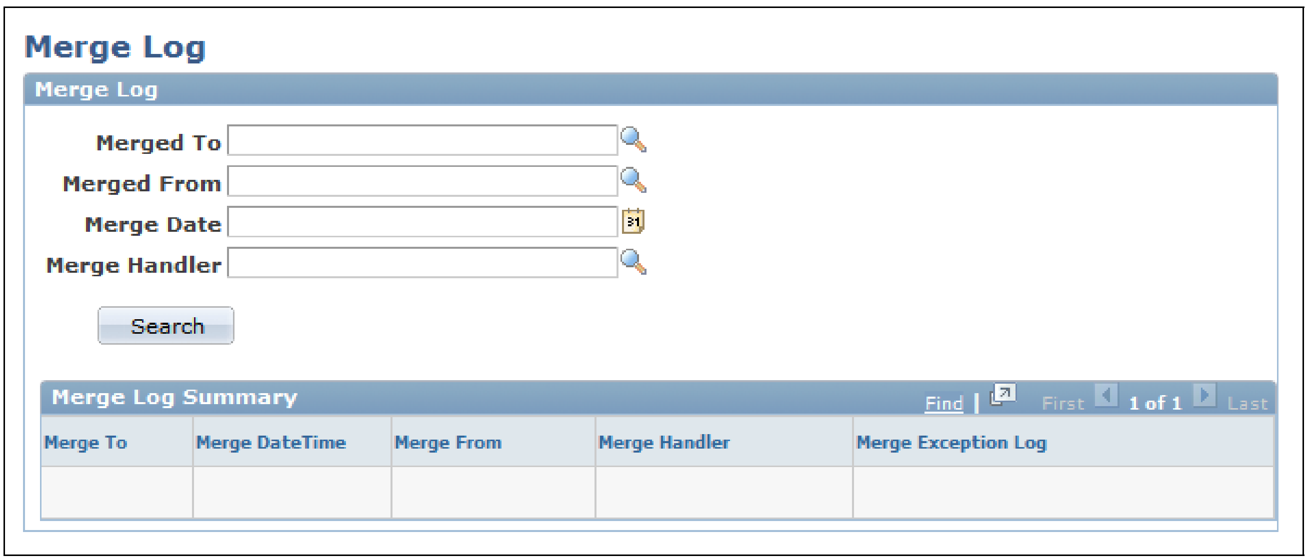
In addition to updating the customer information, all the transactional data that referred to the nonsurviving entries from a merge request is updated. For this example, assume that prior to the merge request one Service Order (ID SVC0300004) existed for Manheim Inc and one for Mannheim Inc. (ID SVC0300005).

After the merge of the two companies, the service order (ID SVC0300005) for the nonsurviving company (Mannheim) has been updated with the surviving company name.

Similarly, after the two companies have been merged, if a search is made from a new service order for any companies that begin with the first three letters that the two companies shared in common, only the entry for the surviving company is returned. Because the nonsurviving company has been inactivated, it is not displayed in the results.

Viewing Merge Exception Logs

Access the Merge Log page (Customers CRM, Merge Exception Log, Merge Log).



Merge Log page

Use this page to access the merge exception log that the system creates when exceptions occur during PeopleCode processing. Specify at least one of the search criteria (merge-to business object, merge-from business object, merge date, and merge handler) to locate logging information.

Working with Online Duplicate Prevention

This section provides overviews of online duplicate prevention (ODP) and its usage and discusses how to work with online duplicate prevention.

Understanding Online Duplicate Prevention

When a user adds a new customer entry in the PeopleSoft CRM system, Online Duplicate Prevention uses the CDH Merge Rules to identify existing entries similar to the one being created. By presenting these similar entries to the user prior to saving the new entry, the system enables the user to select one of the existing entries instead of continuing with the creation of the new entry. This helps prevent the introduction of duplicate entries in the system.

Users can continue to create and use a new entry unless the match score of the new entry exceeds the override threshold for that context. *Override thresholds* are defined in the CDH system and are associated with match rules. If a user attempts to create and use a new entry that is so close to an existing entry that it exceeds the override threshold, the system forces the user to select the existing entry rather than create a duplicate.

Online Duplicate Prevention Usage

Online Duplicate Prevention is available from the following contexts:

- Customer Data Model pages used to add any of the following types of entries:
  - Company
  - Site
  - Person
  - Client
  - Partner
- Quick Create pages accessed directly from left hand navigation (Customers CRM, Quick Create) to add new CDM business object entries.
- Quick Create pages accessed from CRM transactional pages to add new CDM business object entries.

  See and Chapter 14, "Using Business Object Search and Quick Create Functionality," page 303.

Certain application business flows also implement duplicate prevention logic. Conversion of a lead to an opportunity is an example of this.

Use the HZ:Enable Duplicate Prevention at party Creation profile option to control whether duplicate prevention is performed in the CDH system. When the Enable Duplicate Prevention button is selected on the Oracle CDH Installation Options page in the PeopleSoft CRM system, the HZ:Enable Duplicate Prevention at party Creation option must also be activated within the CDH system.

Pages Used to Work with Online Duplicate Prevention

Page Name	***Definition Name***	***Navigation***	***Usage***
Add Company	RDH_ADD	Customers CRM, Add Company	Add a new company. If CDH is installed, Online Duplicate Prevention identifies possible duplicates before the new entry is saved.
Add Person	RDH_ADD	Customers CRM, Add Person	Initiate addition of a new person. Online Duplicate Prevention is activated if CDH is installed to identify possible duplicates before new entry is saved
Add Site	RDH_ADD	Customers CRM, Add Site	Initiate addition of a new site. Online Duplicate Prevention is activated if CDH is installed to identify possible duplicates before new entry is saved
Add Client	RDH_ADD	Customers CRM, Add Client	Initiate addition of a new client. Online Duplicate Prevention is activated if CDH is installed to identify possible duplicates before new entry is saved
Evaluate Duplicate Company	RDH_MATCH_COMPANY	Customers CRM, Add Company Create a new company (using data similar to an existing entry), and click the Add button.	View possible duplicate entries for the company entry being created.

Working with Online Duplicate Prevention

This section provides examples that illustrate how Online Duplicate Prevention is invoked from various components to help prevent the creation of redundant customer entries. It depicts information that a user entered to create a new company (after navigating to Customers CRM, Add Company).

When the user saves the newly added company, the system invokes Online Duplicate Prevention to check for similar entries. If no potential matches are found, the user is transferred to the main component for company creation, and the information from the initial Add Company page is copied to the corresponding fields in the new component to enable the user to continue creating the new entry. However, if one or more potential matches are found, they appear to the user on the Evaluate Duplicate Company page.

If the system returns an entry with a match score that exceeds the match threshold, the user must select this company entry or cancel the transaction. If the returned entry does not exceeds the match threshold, the user can choose to select the similar entry, continue to create a new entry, or cancel the transaction.

Users can also create CDM data through various Quick Create entries available from many transaction pages.

If the user clicks the Create Company With Contact link, the Create Company With Contact page appears.

When the user clicks the Save button on this page, the system invokes the Online Duplicate Prevention functionality to check for existing similar entries. If a possible duplicate entry is detected, it is presented to the user.

The user can continue using the new data just entered on the Create Company With Contact page by clicking the link for the new entry listed under the Use New Company heading. Alternatively, the user can use an existing entry by clicking a link in the Name column for the desired row in the grid displaying similar entries.

Initiating Full Synchronization of PeopleSoft CRM Customer Data with CDH

This section provides an overview of the full synchronization procedure, lists prerequisites, and discusses how to:

- Configure Oracle Warehouse Builder and import full-sync projects.
- Generate CDH bulk import batches.
- Download CDH extensible attribute groups seed data to PeopleSoft CRM.
- Download CDH batch IDs to PeopleSoft CRM.
- Run PeopleSoft full-sync application engine jobs to populate staging tables.
- Run the Company full-sync application engine job.
- Run the Consumer full-sync application engine job.
- Run the Contact full-sync application engine job.
- Run the Partner full-sync application engine job.
- Run the Site full-sync application engine job.
- Upload PeopleSoft CRM staging tables to CDH interface tables.
- Process CDH bulk import.
- Download CDH source system management cross-references to PeopleSoft CRM.
- Run the extensible attributes application engine job.
- Upload PeopleSoft CRM extensible attributes to CDH.
- Purge full-sync batches.

Understanding the Full Synchronization Procedure

Use the Full Sync procedure to publish customer-related data from the PeopleSoft CRM system to the Oracle CDH system. This procedure is typically useful when the user of an existing PeopleSoft CRM installation installs Oracle CDH. In this situation, it is useful for all the existing PeopleSoft CRM customer-related data to be copied over to the CDH system.

The CRM to CDH Full Sync procedure uses various steps to prepare and transfer data from PeopleSoft CRM to the Oracle CDH. The following applications are used to perform these steps:

- PeopleSoft CRM

  Use to move data into Full Sync staging tables in preparation for loading into CDH interface tables.

- Oracle Warehouse Builder

  Use to transform and load data from PeopleSoft CRM Full Sync staging tables into CDH interface tables that can be used by Oracle's Bulk Import Process.

- Oracle CDH

  Use to load data from the CDH interface tables into Oracle TCA using the Bulk Import functionality.

Preparing Data for Full Sync in PeopleSoft CRM

During the Full Sync process, data from the PeopleSoft CRM customer-related tables is moved into a set of tables in which the structure more closely resembles that of the CDH interface tables used in the next stage of the process. Six Application Engine programs are used to move company, contact, site, consumer, partner, and extensible attribute data from the PeopleSoft CRM CDM tables to the intermediate PeopleSoft CRM Full Sync staging files. These application engine programs are invoked from within PeopleSoft Pure Internet Architecture pages.

See the following section in this document for more details on how to invoke the Full Sync Application Engine programs.

Running these Application Engine programs populates the PeopleSoft CRM Full Sync staging tables. When data is available in these CRM Full Sync staging tables, the corresponding interface tables must be populated by means of Oracle's Warehouse Builder.

Transferring Data Using Oracle's Warehouse Builder

The Oracle Warehouse Builder is a tool that provides Extract, Transform and Load (ETL) data functionality. Use this tool to move the data from the PeopleSoft CRM staging tables to the CDH interface tables that can be used by Oracle's Bulk Import facility.

See *Oracle Warehouse Builder User's Guide.*

See *Oracle Warehouse Builder Installation and Configuration Guide.*

See *Oracle Warehouse Builder Scripting Reference.*

See *Oracle Warehouse Builder Transformation Guide.*

Import the following two system-delivered projects in Oracle Warehouse builder to load the associated scripts and metadata required for the data transfer:

- ECRM_CDH_CUSTOMER_FULLSYNC-PROJECT.mdl
- ECRM_CDH_CUSTOMER_FULLSYNC-LOCATION.mdl

Configure the PeopleSoft CRM system as the data source and the Oracle Interface tables as the target and deploy the project metadata. Open the ECRM_CDH_CUSTOMER_FULLSYNC project, start the process flow entitled CUSTOMER_FLOW, and execute mappings to move data to the staging tables:

At this point, the interface tables are ready for use as the source for the last major step in the process, loading data into Oracle using Bulk Import.

Loading Data into Oracle Using Bulk Import

Use Bulk Import to load batches of data from the interface tables into their corresponding staging tables and into the TCA Registry. The CDH Bulk Import Data Load process uses staging tables to improve performance during the data load. When the data has been loaded into the interface tables, it is available for use by Oracle's Bulk Import functionality. As each batch in the interface tables is selected for import and moved into staging tables for processing, the data is matched against the Multiple Original System Reference (MOSR) mapping tables to determine whether the record is an explicit update or insert. From the staging tables, the data is sent through the appropriate TCA validations to maintain data integrity of all information being loaded. It can also be sent to Data Quality Management for duplicate identification as requested by the user. Records that pass validation are moved into the appropriate TCA tables and records that fail are sent to the Errors table.

See *Oracle Trading Community Architecture Administration Guide.*

See *Oracle Trading Community Architecture Reference Guide.*

See *Oracle Trading Community Architecture Technical Implementation.*

See *Oracle Trading Community Architecture User Guide Release.*

Overview of Processes in Full Sync Procedure

The following table provides a detailed outline of the steps involved in the Full Sync process and indicates the application used for each step:

Step	**Process**	**Application**
1	Configure Oracle Warehouse Builder and import Full Sync projects	Oracle Warehouse Builder
2	Generate CDH Bulk Import Batches	Oracle Customer Data Hub
3	Download CDH Extensible Attribute Groups Seed Data to PeopleSoft CRM	Oracle Warehouse Builder
4	Download CDH Batch IDs to PeopleSoft CRM	Oracle Warehouse Builder
5	Run Company, Site, Consumer, Partner, and Contact Full-Sync application engine jobs (Create/Populate Staging Tables)	PeopleSoft CRM
6	Upload PeopleSoft CRM Staging Tables to CDH Interface Tables	Oracle Warehouse Builder

Step	Process	Application
7	Process CDH Bulk Import	Oracle Customer Data Hub
8	Download CDH Source System Management (SSM) Party ID / BO ID Cross-References to PeopleSoft CRM	Oracle Warehouse Builder
9	Run Extensible Attributes application engine job	PeopleSoft CRM
10	Upload PeopleSoft CRM Extensible Attributes to CDH	Oracle Warehouse Builder
11	Purge Full-Sync Batches	PeopleSoft CRM

Note. Each of these steps is explained in more detail in subsequent sections.

Prerequisites

Before beginning this process, verify that you have installed:

- PeopleSoft CRM application.
- Oracle CDH application.
- Oracle Warehouse Builder and Oracle Warehouse Builder Repository.

You should have a working knowledge of how to use Oracle Warehouse Builder and Oracle Customer Data Hub, especially the Trading Community Architecture functionality.

See *Oracle Warehouse Builder User's Guide, Oracle Warehouse Builder Installation and Configuration Guide, Oracle Warehouse Builder Scripting Reference, and Oracle Warehouse Builder Transformation Guide.*

See *Oracle Trading Community Architecture Administration Guide, Oracle Trading Community Architecture Reference Guide, Oracle Trading Community Architecture Technical Implementation, and Oracle Trading Community Architecture User Guide Release.*

Pages Used to Initiate Full Synchronization of PeopleSoft CRM Customer Data with CDH

Page Name	Definition Name	Navigation	Usage
Full-Sync Publish	RB_PUB_FULLSYNC	Customers CRM, CDH Full-Sync Publish, Run Full-Sync Publish	Initiate Full Sync data transfer for different sets of customer information.
Run Contact Full-Sync	RB_PUB_CNTCT_FULL	On the Full Sync Publish page, click the Run Contact Full Sync link.	Initiate Full Sync data transfer for contact information.

Page Name	*Definition Name*	*Navigation*	*Usage*
Run Company Full-Sync	RB_PUB_COMP_FULL	On the Full-Sync Publish page, click the Run Company Full-Sync link.	Initiate Full Sync data transfer for company information.
Run Consumer Full-Sync	RB_PUB_CONS_FULL	On the Full-Sync Publish page, click the Run Consumer Full-Sync link.	Initiate Full Sync data transfer for consumer information.
Run Extensible Attributes	RB_PUB_ORG_PFL_EXT	On the Full-Sync Publish page, click the Run Extensible Attributes link.	Initiate Full Sync data transfer for extensible attribute information.
Run Partner Full-Sync	RB_PUB_PRTNR_FULL	On the Full-Sync Publish page, click the Run Partner Full-Sync link	Initiate Full Sync data transfer for partner information.
Run Purge Batch	RB_PUB_PURGE	On the Full-Sync Publish page, click the Run Purge Batch link.	Purge the data in the staging tables from prior runs.
Run Site Full-Sync	RB_PUB_SITE_FULL	On the Full-Sync Publish page, click the Run Site Full-Sync link	Initiate Full Sync data transfer for site information.

Configuring Oracle Warehouse Builder and Importing Full Sync Projects

Here are the procedures for importing the PeopleSoft CRM Full Sync projects and configuring Oracle Warehouse Builder (OWB) in preparation for running data Extract, Transform, and Load (ETL) scripts.

To import the PeopleSoft Full Sync projects into OWB:

1. Start OWB Design Center.
2. Log in entering user name, password, host, port, and service name.
3. Import the following two OWB Metadata projects provided by Oracle:
   - ECRM_CDH_CUSTOMER_FULLSYNC-PROJECT.mdl
   - ECRM_CDH_CUSTOMER_FULLSYNC-LOCATION.mdl
4. Save the imported projects.

To configure and establish the connection information in OWB:

1. Open the ECRM_CDH_CUSTOMER_FULLSYNC project.

2. From within the Project Explorer pane, select the CDH module (Databases, Oracle, CDH), and edit it in the following way:

   - On the Metadata Location tab, select *CDH_LOCATION* as the location.
   - On the Data Locations tab, select *CDH_LOCATION* as the desired location and click OK.

3. On the Connection Explorer pane, select the CDH_LOCATION module (Databases, Oracle, CDH_LOCATION), and edit it to enter the appropriate connection information for your CDH database. Test the connection using the Test Connection button and click OK when done.
4. On the Project Explorer pane, select the CDH_VIEWS module (Databases, Oracle, CDH_VIEWS), and edit it in the following way:

   - On the Metadata Location tab, select *CDH_VIEWS_LOCATION* as the location.
   - On the Data Locations tab, select *CDH_VEIWS_LOCATION* as the desired location and click OK.

5. On the Connection Explorer pane, select the CDH_VIEWS_LOCATION module (Databases, Oracle, CDH_VIEWS_LOCATION), and edit it to enter the appropriate connection information for your CDH database. Test the connection using the Test Connection button and click OK when done.
6. On the Project Explorer pane, select the DEPLOY_CDH_ECRM module (Databases, Oracle, DEPLOY_CDH_ECRM), and edit it in the following way:

   - On the Metadata Location tab, select *DEPLOY_LOCATION* as the location.
   - On the Data Locations tab, select *DEPLOY_LOCATION* as the desired location and click OK.

7. On the Connection Explorer pane, select the DEPLOY_LOCATION module (Databases, Oracle, DEPLOY_LOCATION), and edit it to enter the appropriate connection information. DEPLOY_LOCATION is the database location that hosts the OWB Repository. Test the connection using the Test Connection button and click OK when done.
8. On the Project Explorer pane, select the DEPLOY_ECRM_CDH module (Databases, Oracle, DEPLOY_ECRM_CDH), and edit it in the following way:

   - On the Metadata Location tab, select *DEPLOY_LOCATION* as the location.
   - On the Data Locations tab, select *DEPLOY_LOCATION* as the desired location and click OK.

9. On the Connection Explorer pane, select the DEPLOY_LOCATION module (Databases, Oracle, DEPLOY_LOCATION). Test the connection using the Test Connection button and click OK when done.
10. On the Project Explorer pane, select the ECRM_BO module (Databases, Oracle, ECRM_BO), and edit it in the following way:

    - On the Metadata Location tab, select *ECRM_LOCATION* as the location.
    - On the Data Locations tab, select *ECRM_LOCATION* as the desired location and click OK.

11. On the Connection Explorer pane, select the ECRM_LOCATION module (Databases, Oracle, ECRM_LOCATION), and edit it to enter the appropriate connection information for your PeopleSoft CRM database. Test the connection using the Test Connection button and click OK when done.

To register the locations:

1. From within OWB Design Center, navigate to Tools, Preferences and ensure that the Naming Mode option is set to *Physical Names.*
2. From within Control Center Manager in OWB, view and register each of the following locations:
   - CDH_LOCATION
   - CDH_VIEWS_LOCATION
   - DEPLOY_LOCATION
   - ECRM_LOCATION
3. Click Save All and exit OWB.

To verify connections to the source and target database, you may want to:

1. Log in to OWB and open the *ECRM_CDH_CUSTOMER_FULLSYNC* project.
2. From within Project Explorer, expand each module so that its tables are visible.
3. Select and right-click one table from within the CDH module and select Data from the pop-up menu to ensure that the data in the table is visible. You are prompted to enter the password to access the appropriate database, and can also verify the connection by clicking the Test Connection button.
4. Repeat the preceding step for the modules CDH_VIEWS, ECRM, and ECRM_BO.

To deploy the OWB metatdata.

1. Log in to OWB and open the *ECRM_CDH_CUSTOMER_FULLSYNC* project.
2. Open Control Center Manager.
3. Select and highlight the *DEPLOY_LOCATION* object
4. Set the action to Create (right-click the object and select Set Action, then Create).
5. Deploy the object (right-click the object and select Deploy).
6. Repeat steps 3–5 for the following objects:
   - CDH_LOCATION
   - CDH_VIEWS_LOCATION
   - ECRM_LOCATION

Generating CDH Bulk Import Batches

CDH uses batch IDs to group data to be submitted for its Bulk Import process. Create the batch IDs in the CDH system. This data will be copied to the PeopleSoft CRM system in a subsequent step so that data can be tagged for inclusion in specific batches.

To generate the Bulk Import batch IDs:

1. Log in to Oracle E-Business Suite CDH application using a data librarian user ID.

2. Navigate to Administration, Source System and select *ECRM* as the source system code to confirm that PeopleSoft CRM is registered as a spoke on the CDH.

3. Navigate to Import, Batch Import and click Generate Batch to create new batch IDs for::

   - Company Full Sync
   - Contact Full Sync
   - Consumer Full Sync
   - Partner Full Sync
   - Site Full Sync

Note. Oracle recommends that you use a descriptive name for each batch that clearly shows the type of data intended for that batch (company, contact, consumer, partner, and site).

Downloading CDH Extensible Attribute Groups Seed Data to PeopleSoft CRM

To download the CDH extensible attribute group seed data to PeopleSoft CRM:

1. Log in to OWB and open the ECRM_CDH_CUSTOMER_FULLSYNC project.

2. Expand the CDH_VIEWS module and highlight the table entry for ECRM_ATTRUBUTE_GROUP_CODES_V. Right-click the entry and select Data from the pop-up menu to confirm the extensible attribute entries that must be copied to the CRM system.

3. Expand the DEPLOY_CDH_ECRM module, right-click the CDH_ECRM_RDH_ATTR_GROUP mapping, and select Start from the pop-up menu to begin the data transfer from the CDH system to the CRM system.

4. Expand the ECRM module, right-click the ECRM PS_RDH_ATTR_GROUP table entry, and select Data from the pop-up menu to view the data for that table. You should see the imported extensible attribute data in this PeopleSoft CRM table.

Downloading CDH Batch IDs to PeopleSoft CRM

To download the CDH batch ID data to the PeopleSoft CRM system:

1. Log in to OWB and open the ECRM_CDH_CUSTOMER_FULLSYNC project.

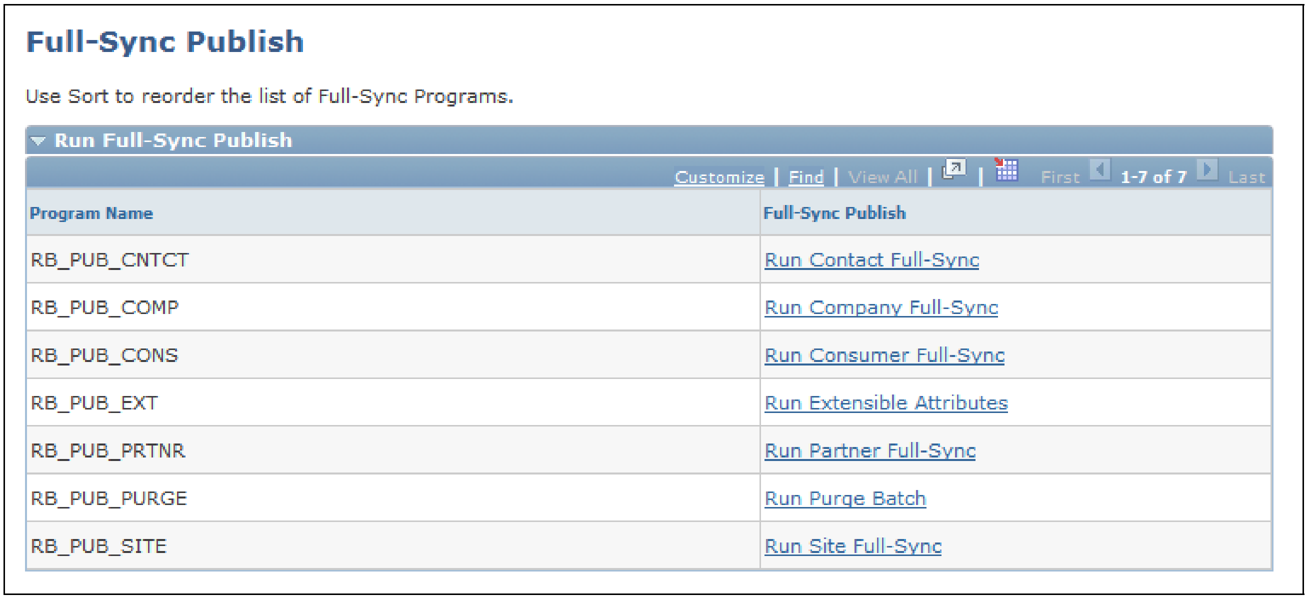
2. Expand the CDH module and highlight the table entry for HZ_IMP_BATCH_SUMMARY. Right-click the entry and select Data from the pop-up menu to confirm the batch ID entries created in the previous procedure.

3. Expand the DEPLOY_CDH_ECRM module, right-click the CDH_ECRM_IMP_ORIG_SYSTEM mapping, and select Start from the pop-up menu to begin the data transfer of batch IDs from the CDH system to the CRM system.

4. Expand the ECRM module, right-click the PS_IMP_ORIG_SYSTEM table entry and select Data from the pop-up menu to view the data for that table. You should see the imported batch ID data in this PeopleSoft CRM table.

Running PeopleSoft Full-Sync Application Engine Jobs to Populate Staging Tables

Access the Full-Sync Publish page (Customers CRM, CDH Full-Sync Publish, Run Full-Sync Publish).



Full-Sync Publish

Use Sort to reorder the list of Full-Sync Programs.

Run Full-Sync Publish

Customize | Find | View All | First 1-7 of 7 Last

Program Name	Full-Sync Publish
RB_PUB_CNTCT	Run Contact Full-Sync
RB_PUB_COMP	Run Company Full-Sync
RB_PUB_CONS	Run Consumer Full-Sync
RB_PUB_EXT	Run Extensible Attributes
RB_PUB_PRTNR	Run Partner Full-Sync
RB_PUB_PURGE	Run Purge Batch
RB_PUB_SITE	Run Site Full-Sync

Full-Sync Publish page

Moving of CRM Customer Data to Staging Tables

Customer-related data used by the PeopleSoft CRM system is stored in various tables including:

- PS_BO
- PS_BO_NAME
- PS_BO_ROLE
- PS_BO_REL
- PS_BO_CM
- PS_BO_CM_USE
- PS_BO_EMPLOYMENT
- PS_BO_EXEMPT
- PS_BC
- PS_BC_SOLDTO_OPT
- PS_BC_SHIPTO_OPT
- PS_BC_BILLTO_OPT

- PS_CM
- PS_RD_COMPANY
- PS_RD_CONSUMER
- PS_RD_PERSON
- PS_RD_SITE
- RD_CY_INDUSTRIES

During the Full Sync process, data from these tables is moved into staging tables in which the structure more closely resembles the interface tables used by CDH. Six Application Engine programs exist to move data from the PeopleSoft CRM CDM tables to the intermediate PeopleSoft CRM Full Sync staging files.

This table summarizes the Full Sync Application Engine program names and their purpose.

Application Engine Program	***Purpose***
RB_PUB_COMP	Move company-related CDM data to PeopleSoft CRM staging tables.
RB_PUB_CNTCT	Move contact-related CDM data to PeopleSoft CRM staging tables.
RB_PUB_SITE	Move site-related CDM data to PeopleSoft CRM staging tables.
RB_PUB_CONS	Move consumer-related CDM data to PeopleSoft CRM staging tables.
RB_PUB_PRTNR	Move partner-related CDM data to PeopleSoft CRM staging tables.
RB_PUB_EXT	Move Extensible Attribute CDM data to PeopleSoft CRM staging tables.

Running the preceding application engine programs populates the following PeopleSoft CRM Full Sync staging tables.

- PS_IMP_ADDRESS_INT
- PS_IMP_ADDRUSE_INT
- PS_IMP_CONTACT_INT
- PS_IMP_CNTROLE_INT
- PS_IMP_CONTPTS_INT
- PS_IMP_PARTIES_INT
- PS_IMP_RELSHIP_INT
- PS_IMP_PER_PFL_EXT
- PS_IMP_PER_PFL_TL
- PS_IMP_ORG_PFL_EXT
- PS_IMP_ORG_PFL_TL

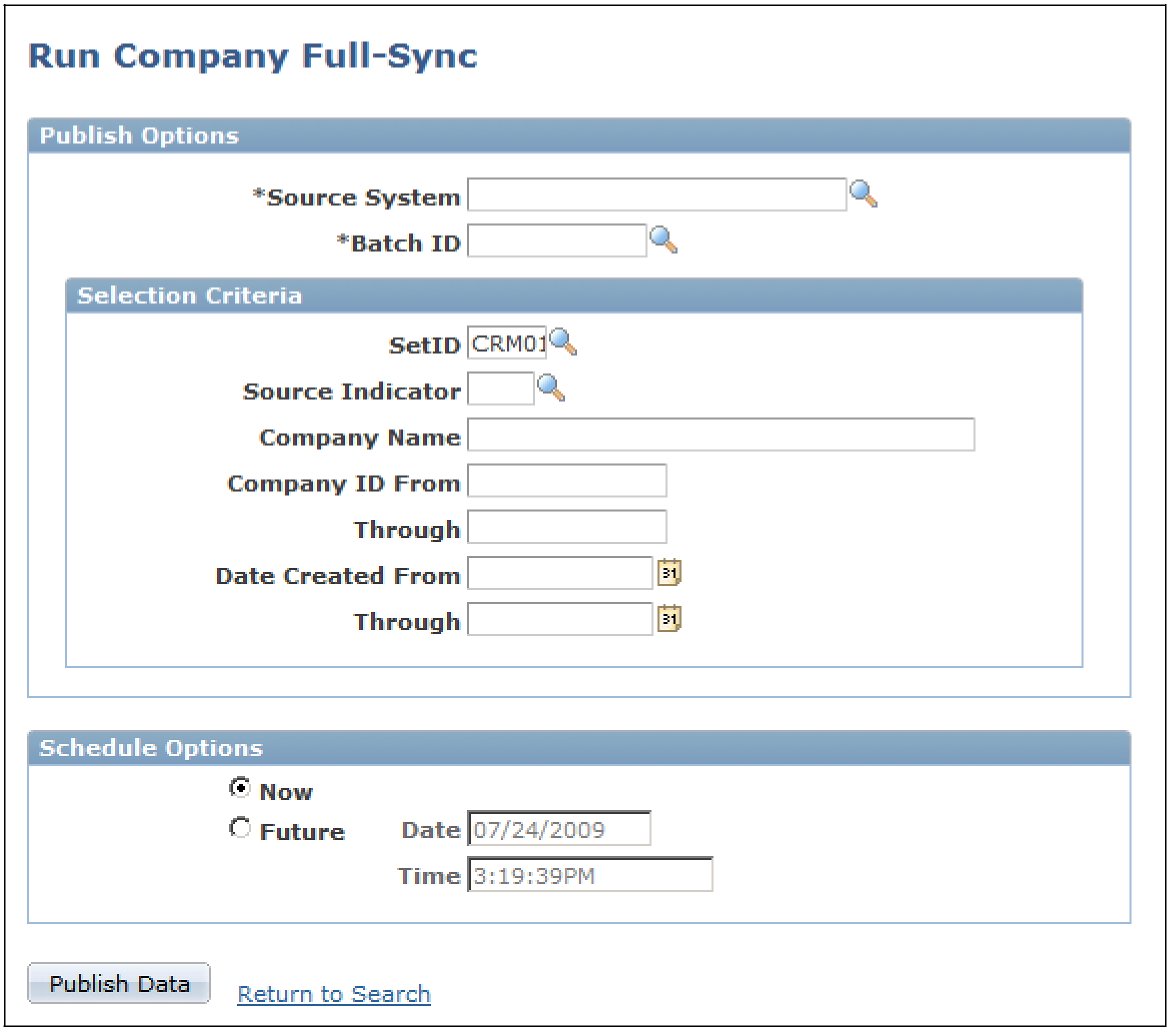
- PS_IMP_PARTY_REF
- PS_IMP_PARTY_USG

Run Full-Sync Publish

Program Name	The Application Engine program to initiate. All but one of the programs are used to transform and transfer data from application CDM tables to Full Sync staging tables. The remaining program (RB_PUB_PURGE) is used to purge data from the Full-Sync staging tables.
Full-Sync Publish	Click to initiate the application engine program for the associated row in the grid (identified in the Program Name column).

Running the Company Full-Sync Application Engine Job

Access the Run Company Full-Sync page (click the Run Company Full-Sync link on the Full-Sync Publish page).



Run Company Full-Sync page

Publish Options

Source System	The source system entry used by Oracle CDH to identify the PeopleSoft CRM system.
Batch ID	The batch ID is used by Oracle CDH to identify groups of data to be processed during a Bulk Import operation. These batch IDs must be copied from CDH into PeopleSoft CRM. Select the batch ID created to process company data.
SetID	Specify a setID to limit which company entries are transferred for the Full Sync operation.
Source Indicator	Specify an originating source to limit which company entries are transferred for the Full Sync operation.

Company Name	Specify a name to limit data for the Company Full Sync operation to a specific company.
Company ID From and **Through**	Specify a range of company ID entries to limit which company data is transferred for the Full Sync operation.
Date Created From and **Through**	Specify a range of company entry creation dates to limit which company data is transferred for the Full Sync operation.

Schedule Options

Now	Select to initiate the Company Full Sync application engine program immediately.
Future,Date, and **Time**	Select the Future option to initiate the Company Full Sync application engine program on the date and time specified.
Publish Data	Select to initiate the Company Full Sync application engine program.

To initiate immediate transfer of all company data, leave the Selection Criteria fields empty, select *Now* in the Schedule Option field, and click the Publish Data button.

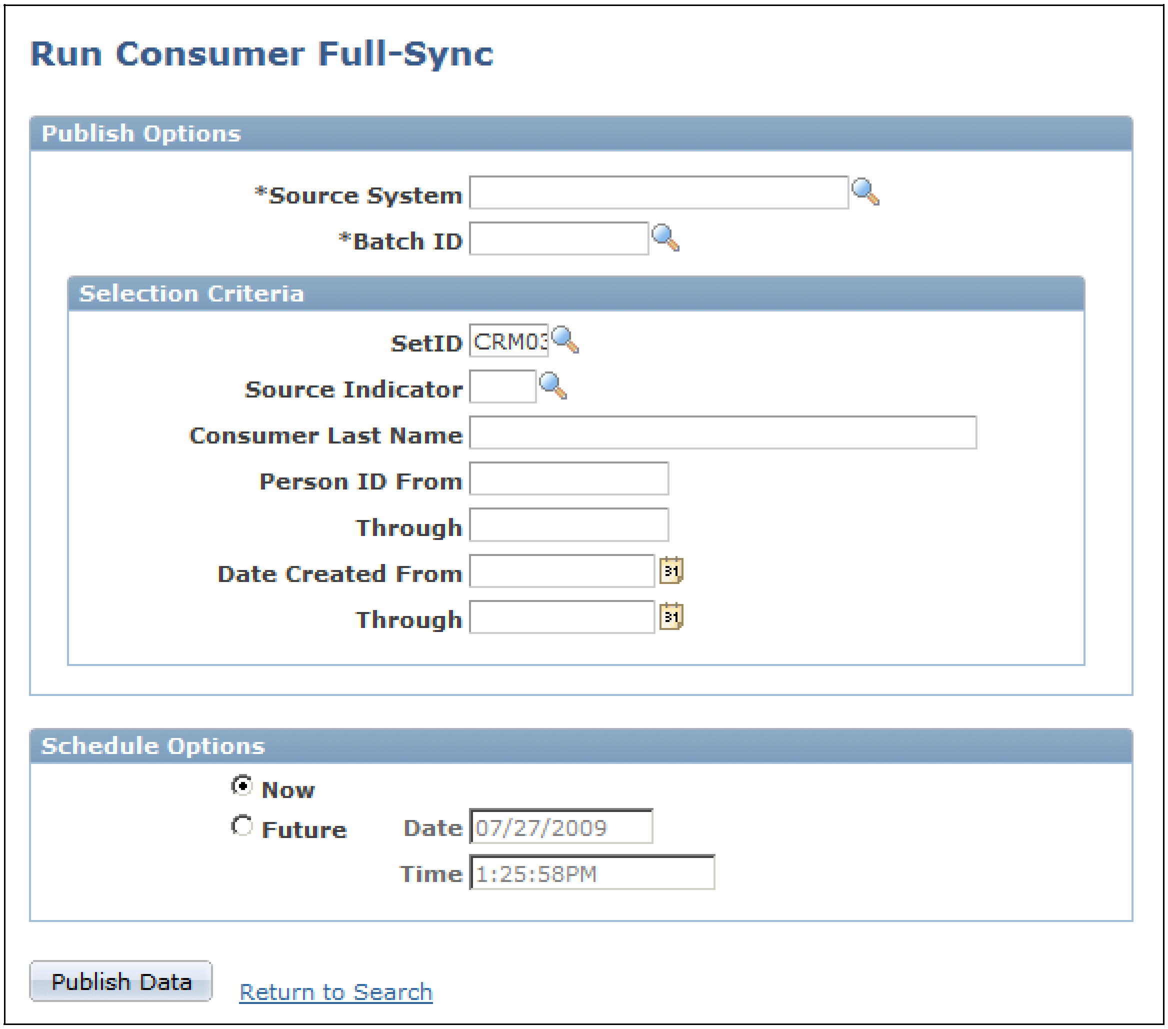
Check the status of the application engine program in the Process Monitor page.

The run status of the RB_PUB_COMP job (Process Name) should appear as *Success.* The Process Monitor Log, accessed from the Details link, provides information about the process, including the number of rows inserted into the staging tables.

Continue the Full Sync process by accessing the Full-Sync Publish page and initiating the application engine programs for each of the other CDM categories of data (*Consumer,Contact,Partner,* and *Site*). Clicking each link will access the associated CDM object Full-Sync page, all of which are described subsequently. From each of these pages, click the Publish Data button to run the associated application engine program.

Running the Consumer Full-Sync Application Engine Job

Access the Run Consumer Full-Sync page (click the Run Consumer Full-Sync link on the Full-Sync Publish page).



Run Consumer Full-Sync page

Publish Options

Source System

The source system entry used by Oracle CDH to identify the PeopleSoft CRM system.

Batch ID

The batch ID used by Oracle CDH to identify groups of data to be processed during a Bulk Import operation. These batch IDs must be copied from CDH into PeopleSoft CRM. Select the batch ID created to process consumer data.

SetID

Specify a setID to limit which consumer entries are transferred for the Full Sync operation.

Source Indicator

Specify an originating source to limit which consumer entries are transferred for the Full Sync operation.

Consumer Last Name

Specify a last name to limit data for the Consumer Full Sync operation to a specific consumer.

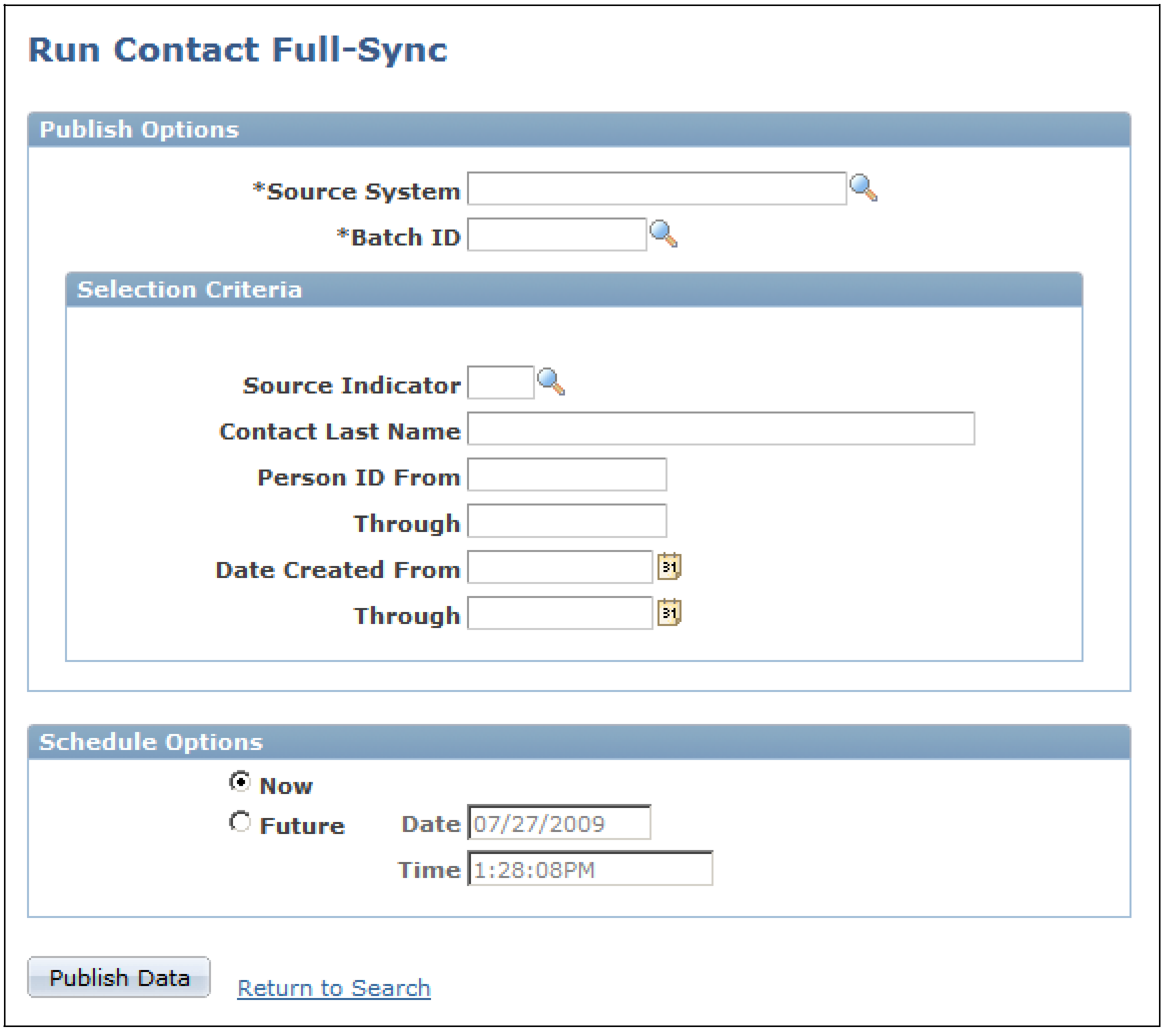
Person ID From and **Through**	Specify a range of person ID entries to limit which consumer data is transferred for the Full Sync operation.
Date Created From and **Through**	Specify a range of consumer entry creation dates to limit which consumer data is transferred for the Full Sync operation.

Schedule Options

Now	Select to initiate the Consumer Full Sync application engine program immediately.
Future,Date, and **Time**	Select the Future option to initiate the Consumer Full Sync application engine program on the date and time specified.
Publish Data	Select to initiate the Consumer Full Sync application engine program.

Running the Contact Full-Sync Application Engine Job

Access the Run Contact Full-Sync page (click the Run Contact Full-Sync link on the Full-Sync Publish page).



Run Contact Full-Sync page

Publish Options

Source System

The source system entry used by Oracle CDH to identify the PeopleSoft CRM system.

Batch ID

The batch ID used by Oracle CDH to identify groups of data to be processed during a Bulk Import operation. These batch IDs must be copied from CDH into PeopleSoft CRM. Select the batch ID created to process contact data.

SetID

Specify a setID to limit which contact entries are transferred for the Full Sync operation.

Source Indicator

Specify an originating source to limit which contact entries are transferred for the Full Sync operation.

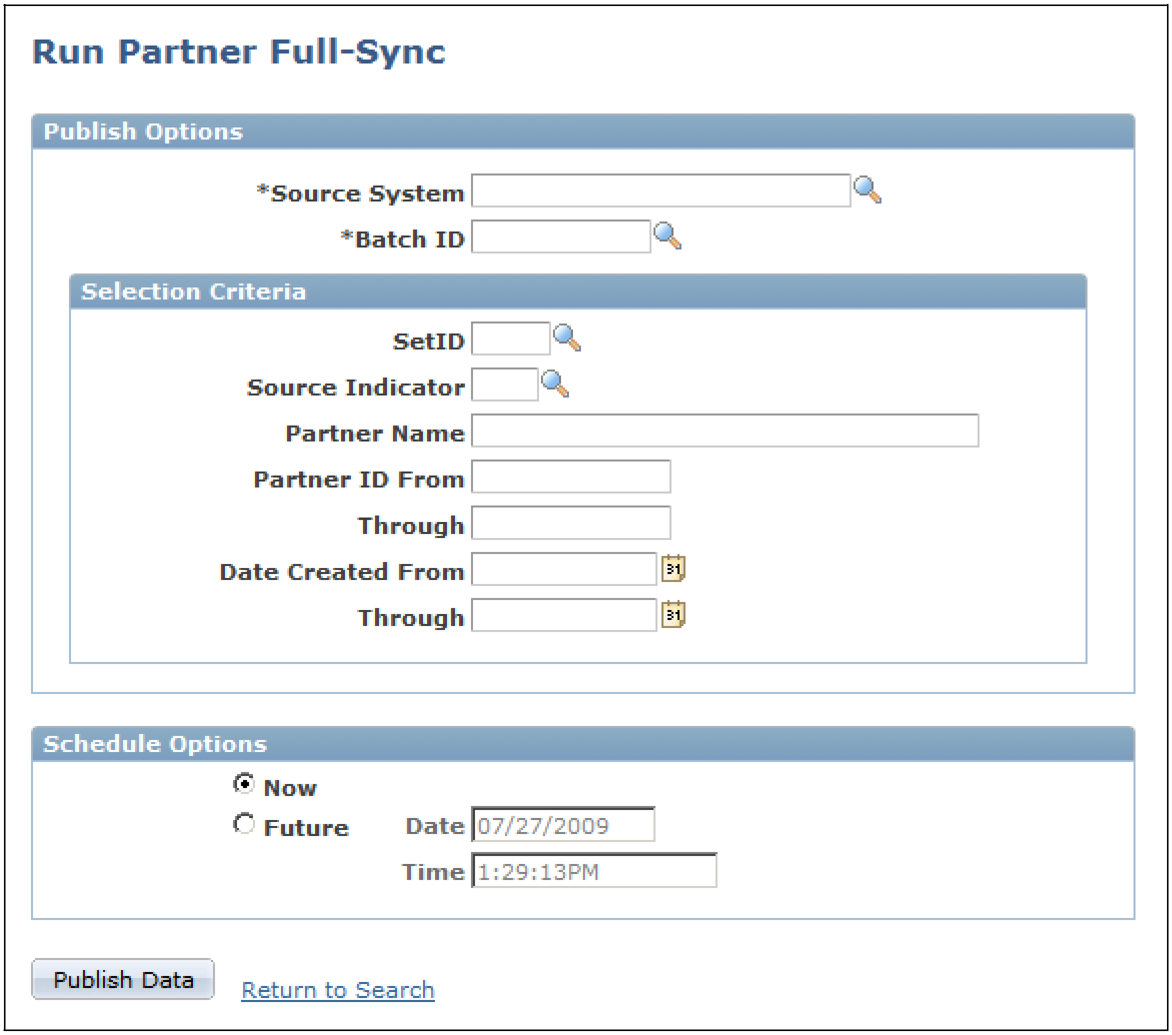
Contact Last Name	Specify a last name to limit data for the Contact Full Sync operation to a specific contact.
Person ID From and **Through**	Specify a range of person ID entries to limit which contact data is transferred for the Full Sync operation.
Date Created From and **Through**	Specify a range of contact entry creation dates to limit which contact data is transferred for the Full Sync operation.

Schedule Options

Now	Select to initiate the Contact Full Sync application engine program immediately.
Future,Date, and **Time**	Select the Future option to initiate the Contact Full Sync application engine program on the date and time specified.
Publish Data	Select to initiate the Contact Full Sync application engine program.

Running the Partner Full-Sync Application Engine Job

Access the Run Partner Full-Sync page (click the Run Partner Full-Sync link on the Full-Sync Publish page).



Run Partner Full-Sync page

Publish Options

Source System

The source system entry used by Oracle CDH to identify the PeopleSoft CRM system.

Batch ID

The batch ID used by Oracle CDH to identify groups of data to be processed during a Bulk Import operation. These batch IDs must be copied from CDH into PeopleSoft CRM. Select the batch ID created to process partner data.

SetID

Specify a setID to limit which partner entries are transferred for the Full Sync operation.

Source Indicator

Specify an originating source to limit which partner entries are transferred for the Full Sync operation.

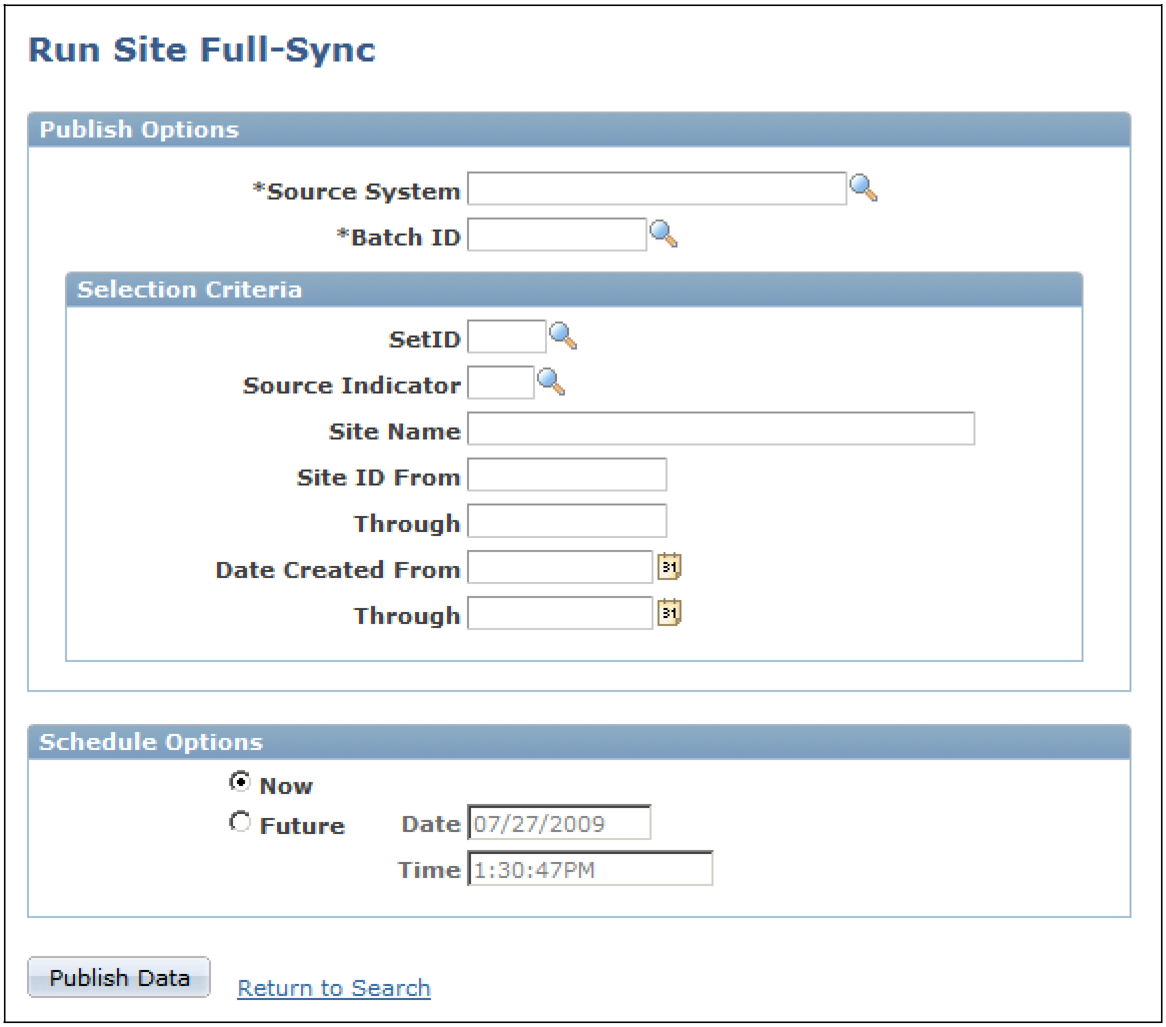
Partner Name	Specify a name to limit data for the Partner Full Sync operation to a specific partner.
Partner ID From and **Through**	Specify a range of partner ID entries to limit which partner data is transferred for the Full Sync operation.
Date Created From and **Through**	Specify a range of Partner entry creation dates to limit which partner data is transferred for the Full Sync operation.

Schedule Options

Now	Select to initiate the Partner Full Sync application engine program immediately.
Future,Date, and **Time**	Select the Future option to initiate the Partner Full Sync application engine program on the date and time specified.
Publish Data	Select to initiate the Partner Full Sync application engine program.

Running the Site Full-Sync Application Engine Job

Access the Run Site Full-Sync page (click the Run Site Full-Sync link on the Full-Sync Publish page).



Run Site Full-Sync page

Publish Options

Source System The source system entry used by Oracle CDH to identify the PeopleSoft CRM system.

Batch ID The batch ID used by Oracle CDH to identify groups of data to be processed during a Bulk Import operation. These batch IDs must be copied from CDH into PeopleSoft CRM. Select the batch ID created to process site data.

SetID Specify a setID to limit which site entries are transferred for the Full Sync operation.

Source Indicator Specify an originating source to limit which site entries are transferred for the Full Sync operation.

Site Name Specify a name to limit data for the Site Full Sync operation to a specific site.

Site ID From and **Through**	Specify a range of site ID entries to limit which site data is transferred for the Full Sync operation.
Date Created From and **Through**	Specify a range of Site entry creation dates to limit which site data is transferred for the Full Sync operation.

Schedule Options

Now	Select to initiate the Site Full Sync application engine program immediately.
Future,Date, and **Time**	Select the Future option to initiate the Site Full Sync application engine program on the date and time specified.
Publish Data	Select to initiate the Site Full Sync application engine program.

Note. When data is available in the CRM Full Sync staging tables, the corresponding interface tables must be populated, as described in the following section on transferring data using Oracle's Warehouse Builder.

See and Chapter 21, "Integrating with the Customer Data Hub," Uploading PeopleSoft CRM Staging Tables to CDH Interface Tables, page 514.

Uploading PeopleSoft CRM Staging Tables to CDH Interface Tables

The Oracle Warehouse Builder is a tool that provides Extract, Transform and Load (ETL) data functionality. This tool is used to move the data from the PeopleSoft CRM staging tables to the interface tables that can be used by Oracle's Bulk Import facility.

See *Oracle Warehouse Builder User's Guide.*

See *Oracle Warehouse Builder Installation and Configuration Guide.*

See *Oracle Warehouse Builder Scripting Reference.*

See *Oracle Warehouse Builder Transformation Guide.*

To upload the CRM staging table data to the CDH interface tables:

1. Log in to OWB and open the ECRM_CDH_CUSTOMER_FULLSYNC project.

2. If Oracle Workflow Server is available, perform this step (2) and skip step 3: From within OWB Project Explorer, start the process flow named CUSTOMER_FLOW (Process Flows, Process Flow Modules, PACKAGE_ECRM_SYNC, Customer, CUSTOMER_FLOW).

   Note. If Oracle Workflow Server is not available, skip this step (2) and perform step 3.

   ---

3. If Oracle Workflow Server is not available and you skipped step 2, then perform this step.

   Note. Steps 2 and 3 perform the same functional task: the only difference is that the procedure outlined in step 2 requires Oracle Workflow Server and accomplishes the task in an automated fashion, while step 3 does not need Oracle Workflow Server but requires the user to manually run each script.

   Deploy the appropriate maps to transfer data. From within OWB Project Explorer, select and right-click the ECRM_CDH_IMP_PARTIES_INT map (Databases, Oracle, CDH, DEPLOY_ECRM_CDH, Mappings), and select Start from the pop-up menu to initiate the associated data transfer. Repeat this procedure for each of the following maps:

   - ECRM_CDH_IMP_ADDRESSES_INT
   - ECRM_CDH_IMP_ADDRESSUSES_INT
   - ECRM_CDH_IMP_CONTACTPTS_INT
   - ECRM_CDH_IMP_RELSHIPS_INT

4. To confirm that the data has been transferred successfully, check the appropriate interface tables. For example, select and right-click the HZ_IMP_PARTIES_INT table (Databases, Oracle, CDH, Tables, HZ_IMP_PARTIES_INT), and select Data from the pop-up menu to view the contents of the main party interface table.

After performing the procedure for the maps mentioned previously, the following interface tables are populated with data from the corresponding PeopleSoft CRM Full Sync staging tables:

- HZ_IMP_ADDRESSES_INT
- HZ_IMP_ADDRESSUSES_INT
- HZ_IMP_CLASSIFICS_INT
- HZ_IMP_CONTACTS_IMP
- HZ_IMP_CONTACTROLES_INT
- HZ_IMP_CREDITRTNGS_INT
- HZ_IMP_CONTACTPTS_INT
- HZ_IMP_FINNUMBERS_INT
- HZ_IMP_FINREPORTS_INT
- HZ_IMP_PARTIES_INT
- HZ_IMP_RELSHIPS_INT

At this point, the interface tables are ready for use as the source for the next step in the process, described in the following section on loading data with the Oracle CDH Bulk Import process.

Processing CDH Bulk Import

To initiate the CDH Bulk Import process:

1. Log in to the Oracle E-Business Suite CDH application using a data librarian user ID.
2. Navigate to Data Librarian, Import, Import Batch, select the batch ID corresponding to the Company Full Sync batch, and click Activate. With the same batch ID selected, click Define Import. Select the desired options presented in the set of wizard pages that appear. Among these options, the following enable you to request that the system should:

   - Resolve duplicates within the batch.
   - Validate addresses within the batch.
   - Display a preview of the results prior to import.
   - Resolve duplicates between the batch and the TCA Registry

   Click Finish after selecting the desired options to initiate processing.
3. Repeat the preceding step for the batch IDs corresponding to each of the following groups:

   - Contact Full Sync
   - Consumer Full Sync
   - Site Full Sync
   - Partner Full Sync

Downloading CDH Source System Management Cross-References to PeopleSoft CRM

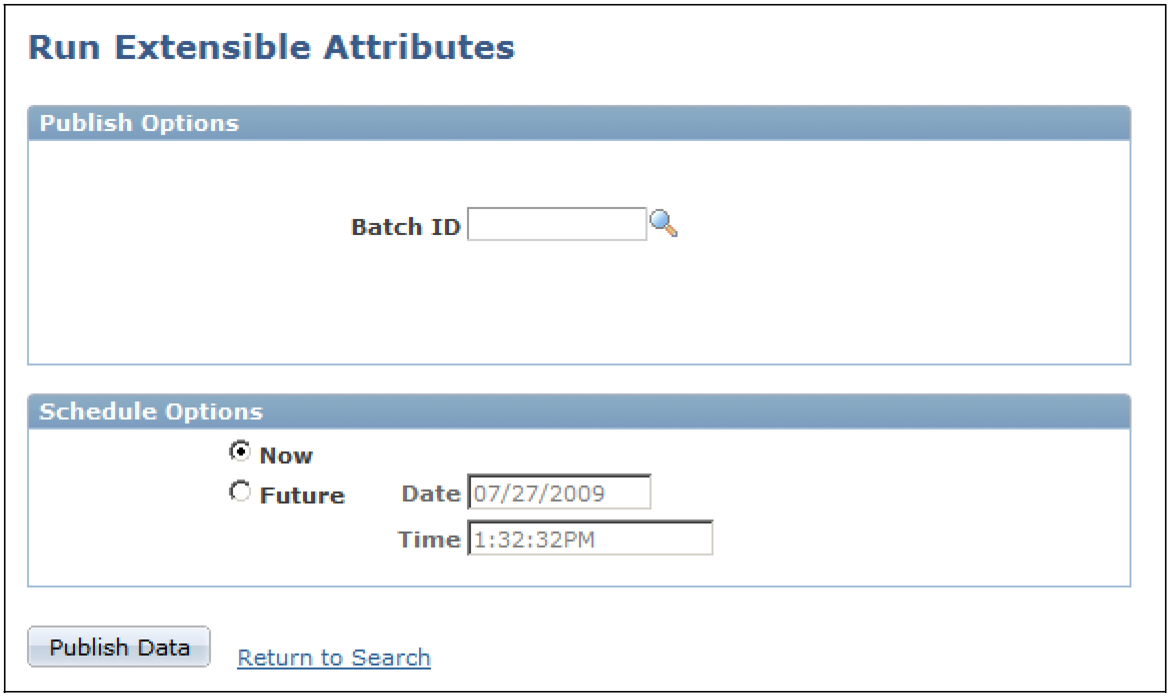
The CDH Source System Management keeps track of cross-references between the TCA party data and the various source system data. This allows each party ID that exists in the TCA registry to be associated with an originating system and the relevant key field value from that source system. The PeopleSoft CRM system maintains a similar cross-reference table for the Full Sync data. (This cross-reference table is not maintained in CRM for the incremental sync processes.)

To synchronize this data, the CDH cross-reference data generated from the Bulk Import process must be downloaded to the PeopleSoft CRM system, as described in the following steps:

1. Log in to OWB and open the ECRM_CDH_CUSTOMER_FULLSYNC project.
2. Verify the CDH cross-reference data. Expand the CDH_VIEWS module and highlight the View entry for ECRM_PARTY_REFERENCES_V. Right-click the entry and select Data from the pop-up menu to view the cross-reference entries created in the Bulk Import procedure. Use a Where Clause value of *ORIG_SYSTEM='ECRM'* (assuming that the PeopleSoft CRM system has been identified as *ECRM* in the TCA) to filter the data appropriately.
3. Expand the DEPLOY_CDH_ECRM module, right-click the CDH_ECRM_IMP_PARTY_REFERENCES mapping, and select Start from the pop-up menu to begin the transfer of cross-reference data from the CDH system to the CRM system.
4. Confirm that the data has been transferred to the PeopleSoft CRM system. Expand the ECRM module, right-click the PS_IMP_PARTY_REF table entry, and select Data from the pop-up menu to view the data for that table. You should see the imported cross-reference data in this PeopleSoft CRM table.

Running the Extensible Attributes Application Engine Job

Access the Run Extensible Attributes page (click the Run Extensible Attributes link on the Full-Sync Publish page).



Run Extensible Attributes page

Batch ID	The batch ID used by Oracle CDH to identify groups of data to be processed during a Bulk Import operation. These batch IDs must be copied from CDH into PeopleSoft CRM. Select the batch ID created to process extensible attribute data.
Now	Select to initiate the Extensible Attributes Full Sync application engine program immediately.
Future, Date, and **Time**	Select the Future option to initiate the Extensible Attributes Full Sync application engine program on the date and time specified.
Publish Data	Select to initiate the Extensible Attributes Full Sync application engine program.

Click the Publish Data button to submit the RB_PUB_EXT Application Engine job. Use the Process Monitor page to view the status of the job.

Uploading PeopleSoft CRM Extensible Attributes to CDH

To upload the CRM extensible attribute data to the CDH:.

1. Log in to OWB and open the ECRM_CDH_CUSTOMER_FULLSYNC project.
2. If Oracle Workflow Server is available, perform this step (2) and skip step 3: From within OWB Project Explorer, start the process flow named ATTRIBUTE_FLOW (Process Flows, Process Flow Modules, PACKAGE_ECRM_SYNC, Attribut, ATTRIBUTE_FLOW).
3. If Oracle Workflow Server is not available and you skipped step 2, then perform this step.

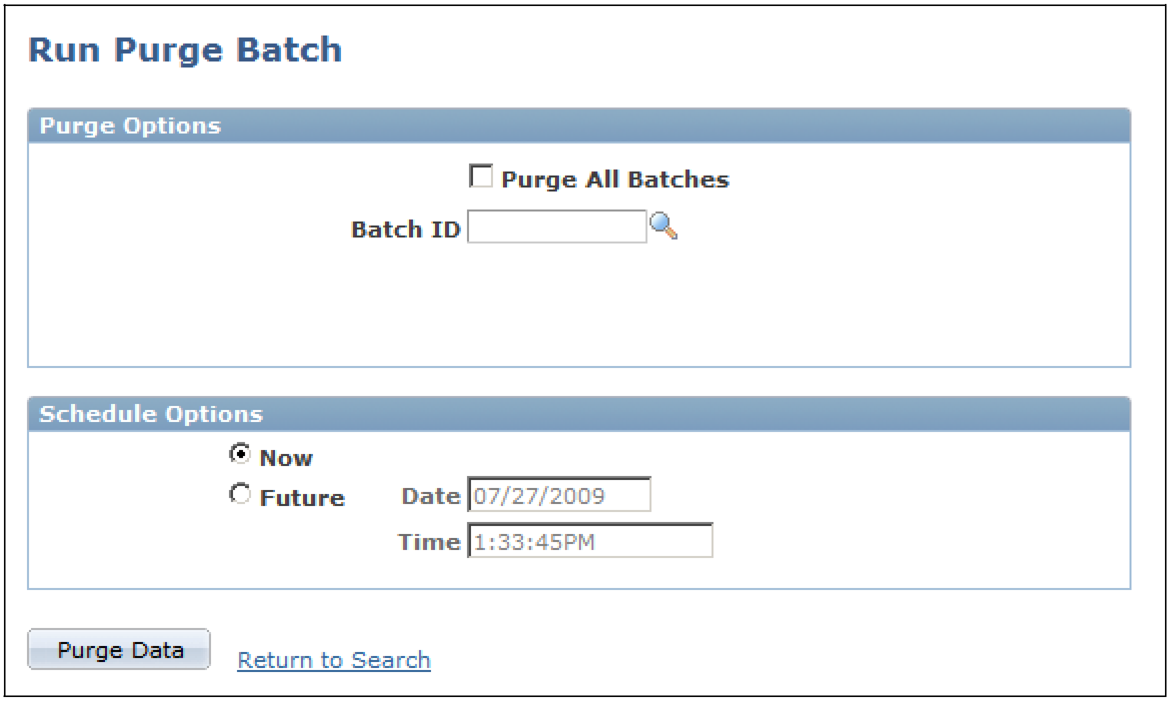
   Note. Steps 2 and 3 perform the same functional task: the only difference is that the procedure outlined in step 2 requires Oracle Workflow Server and accomplishes the task in an automated fashion, while step 3 does not need Oracle Workflow Server but requires you to manually run each script.

   Deploy the appropriate maps to transfer data. From within OWB Project Explorer, select and right-click the ECRM_CDH_PARTY_USAGE map (Databases, Oracle, CDH, DEPLOY_ECRM_CDH, Mappings), and select Start from the pop-up menu to initiate the associated data transfer. Repeat this procedure for each of the following maps:

   - ECRM_CDH_ORG_PROFILES_EXT_B
   - ECRM_CDH_ORG_PROFILES_EXT_TL
   - ECRM_CDH_PER_PROFILES_EXT_B
   - ECRM_CDH_ORG_PROFILES_EXT_TL
4. To confirm that the data has been transferred successfully, check the appropriate CDH tables. For example, select and right-click the HZ_ORG_PROFILES_EXT_B table (Databases, Oracle, CDH, Tables, HZ_ORG_PROFILES_EXT_B), and select Data from the pop-up menu to view the contents of the table.

Purging Full-Sync Batches

Access the Run Purge Batch page (click the Run Purge Batch link on the Full-Sync Publish page).



Run Purge Batch page

Purge All Batches	Select to purge all staging table data.
Batch ID	Specify the batch ID to identify which staging table data to purge.
Now	Select to initiate the Purge Batch application engine program immediately.
Schedule, Date, and **Time**	Select the Schedule option to initiate the Purge Batch application engine program on the date and time specified.
Purge Data	Select to initiate the Purge Data application engine program.

Click the Purge Data button to submit the RB_PUB_PURGE application engine job. Use the Process Monitor page to view the status of the job.

Chapter 22

Application-Specific Impacts of CDH Integration

In this chapter, we provide an overview of CDH integration impact and discuss:

- PeopleSoft Sales.
- PeopleSoft Marketing.
- PeopleSoft Online Marketing.
- PeopleSoft Order Capture.
- PeopleSoft Multichannel Applications.
- PeopleSoft CRM for Financial Services.

Understanding CDH Integration Impact on PeopleSoft Applications

When PeopleSoft CRM integrates with the Customer Data Hub, all CRM application products utilize the common CDH related enhancements. For example, application transaction pages enable Smart Search and online duplicate prevention functionality, while transaction handlers deal with updating applications specific data in response to a CDH merge. In addition to common CRM enhancements, some application products also have specific enhancements made to their business flows and user interfaces to utilize features provided by CDH.

This chapter deals with specific changes to the applications as a result of the Customer Data Hub (CDH) integration with CRM. For complete details on the application and functionality, refer to the PeopleBook for the application.

PeopleSoft Sales

This section discusses the impact of the Customer Data Hub (CDH) integration with CRM on the Sales application.

For complete details on PeopleSoft Sales implementation and business processes refer to *PeopleSoft Sales 9.1 PeopleBook.*

Converting Lead to Opportunity

For PeopleSoft Sales, online duplicate prevention has been enabled for the Convert Lead to Opportunity business flow. When a lead, created with one or more business cards or prospects, is converted to an opportunity, the business cards that are stored locally on the lead are converted into Customer Data Model business objects. The online duplicate prevention logic ensures that the business objects do not already exist in the system as duplicates.

In this example, Lennar Builders is a Customer *business card* on the Lead. It does not exist in the Customer Data Model as a business object, but is simply local data on the Leads table. Similarly, Ian Walters is a Contact business card on the Lead. When the Convert button on the Toolbar is selected, the Lead to Opportunity conversion process begins.

The Convert Lead to Opportunity page is used to create a new opportunity from the lead. When you click OK, duplicate prevention logic is triggered.

If a Company record that is potentially a duplicate of the Customer business card on the lead is found in CDH, the system displays the Evaluate Duplicate Company page so you can decide if the Customer is a duplicate.

The Evaluate Duplicate Company page displays the potential duplicates of Lennar Builders. A record for Lennar Builders with a match score of 93% is shown as a potential duplicate although it shows a slightly different address from that on the Lead.

You can choose to continue creating Lennar Builders as a new Company by selecting the Use New Company link or pick the existing Lennar Builders entry. If you select the existing entry, the Opportunity is created for the existing Company and no new Company is created.

Potential duplicate records found for the Contact business card on the Lead go through a similar duplicate evaluation process.

Once the Opportunity has been created from the Lead, the business cards that previously existed on the Lead are now Customer Data Model business objects. In this example, Lennar Builders is the customer business object and Ian Walters is the contact business object.

Closing Opportunity to Won

Online Duplicate Prevention is also used when an Opportunity containing one or more business cards is closed with a *Won* status.

Lead Import

The Lead Import process imports Leads from a flat file into the Sales application. Each row in the flat file that corresponds to a Lead can include data for a Customer or a Contact which already exists in the system. The Lead Import process uses batch duplicate prevention logic provided by the Customer Data Hub to ensure that a new Customer or Contact record is not created for an imported Lead unless it is determined that the Customer or Contact does not already exist as a duplicate.

With CDH integration, the Lead Import functionality has been enhanced so that one of the two duplicate matching methods for customers and contacts can be used.

If the Customer Data Hub option is selected, then specialized Match Rules in the Hub are utilized to prevent duplicates from being introduced in the system. The existing matching method for Lead Import which uses Template-based Matching setups is also available as a option.

If the CDH matching option is used, match rules are executed for each Lead Import row to determine if a Customer or Contact on a Lead already exists. If a record with a Match Score greater than the Match Threshold of a rule is returned, then it is assumed that the record is a duplicate. In this case no new business object for the Customer or Contact is created and the new Lead created is connected with the existing duplicate Business Object.

If no duplicate record is found, a new Customer or Contact Business Object is created and connected to the new Lead.

If the Sales installation option, Allow Prospects, is enabled for the CRM installation, then a Business Card is created for the new Lead rather than a new business object.

The desired Duplicate Matching Method can be selected on the Sales Lead Import Template page, but you can override the selected method on the Import Sales Lead page during the actual launch of the import process.

Lead Import Template Definition

On the Sales Lead Import Templates page you configure the template for the Lead Import process.

The Select Duplicate Match Method option is displayed if PeopleSoft CRM integrates with CDH. The Duplicate Match Method chosen for the template is used as the default method whenever the template is used for Lead Import.

Select the Allow Override option if you want to allow the default method set at the Template level to be overridden during the Lead Import process.

Running the Import

In the first step of the Lead Import process you select a duplicate match method. The Duplicate Match Method initially defaults from the selected template, however it can be overridden if Allow Override was selected on the Template.

Account Teams

When two customers are merged it is possible that the account teams assigned to the customers will differ. The account team assignment and notification options are determined based on the options defined on the Account Team Options page at implementation.

There are three Account Team Assignment options available:

- Remove Account Team.

  No account team is assigned to the surviving customer. In this case, manual intervention is needed to assign a new account team to the survivor.

- Combine Account Team.

  All account team members of the non-survivors are added to the existing account team of the survivor, after removing any duplicates.

- Retain Survivor Account Team.

  The account team of the survivor remains unchanged, while the account teams of the non-survivors are discarded.

Notifications can be sent to the appropriate people or roles whenever account team assignments are made on a customer merge. Two role notification options have been provided:

- Create Task for Role.

  A Task is created for the specified role. For example, the Sales Applications Administrator role can be notified about the need to assign a new account team to a survivor.

- Email Role.

  An email is sent to the specified role.

Two team notification options have been provided to notify members of the account team of changes that have happened because of a merge:

- Email Account Team Owners Only.

  Only the account team owners of the Survivor and each Non-Survivor are sent emails describing the assignments made and any actions that need to be taken.

- Email all Removed Account Team Members.

  All the original members of the survivor or non-survivor that are no longer on the new account team of the survivor are sent emails.

PeopleSoft Marketing

This section discusses the impact of the Customer Data Hub (CDH) integration with CRM on Marketing.

For complete details on PeopleSoft Marketing implementation and business processes refer to *PeopleSoft CRM 9.1 Marketing Applications PeopleBook.*

Smart Search Functionality

If you have implemented CDH, business object Search pages will have a user check box option to use the Smart Search feature. These Marketing components and fields are affected:

- Marketing Programs: *Sponsor*,*Team Member*,*Task Assigned To,* and *Task Assigned By* fields.
- Content: *Owner.*
- Audiences.
- Offers.
- Marketing Calendar.

Duplicate Prevention

When Quick Create pages invoke a BO search for potential matches, the user will have an option to use Smart Search. If potential matches are found, they will appear on the Potential Duplicates page region with a match score that shows the likelihood of the match being a duplicate. This will occur when a user creates a *Program Sponsor* on a Marketing Campaign or a *Team Member* on a Marketing Calendar.

Impacted Features

When business objects that are referenced by the Marketing Programs, Offer History, Offer Partners, Notification Trigger, Marketing Audiences, and Telesales Leads transactions are merged, any merge-from BO_IDs will be replaced by the merge-to BO ID. Tasks that are associated with these transactions are similarly affected.

Note that worker BOs will not be merged; therefore, only campaign sponsors and team members who have the Worker role are affected.

If a merge results in a duplicate lead within a campaign program, the RC_PROSPECT_STAT field on the duplicate lead record is set to *Done* so that the lead will not be worked on. The merge-from contact will be replaced with the merge-to contact.

The merge-from BO IDs in the audience list will be replaced by the merge-to BO_IDs. If this results in a duplicate BO_ID within an audience, the duplicate will be deleted from the audience list. This applies to both fixed and dynamic audiences.

When a business object identifier is inactivated as the result of a merge, the BO_ID is removed from the basic data tables.

Generated Audience Using PeopleSoft Query

If you have implemented CDH, customers that are referenced in generated audiences might be updated as the result of merging duplicate data in the CDH. If you have created queries for audience generation using PSQUERY, you must review these queries and revise them accordingly.

PeopleSoft Online Marketing

This section discusses the impact of the Customer Data Hub (CDH) integration with CRM on the Online Marketing application.

For complete details on PeopleSoft Online Marketing implementation and business processes refer to *PeopleSoft Online Marketing 9.1 PeopleBook.*

CDH Impact on Email Addresses and Web Links

Online Marketing web and email links often contain the Individual ID or BO_ID to identify the user. If that Individual ID or BO_ID was removed from the basics profiles due to a merge, Online Marketing looks up the master Individual ID or BO_ID in the mapping table provided by CDM. The master business object will then be used instead of the merged-from business object.

CDH Impact on Profiles

The Email Alternative 2 and Email Alternative 3 profile fields will be added to the individual profile as system data. They will be available in the document and dialog designer, but will not be profile questions and will not be an option for sending single or bulk email.

These fields are in addition to the Email Address and Email Alternative that exist in the basics table today.

The new profile fields will be available in the document and dialog designer like any other profile field, except they will not be profile questions. For single or bulk email they will not be available as an option for sending email. These fields will be available for mapping in the CDM Basic Mapping component but are reserved for merge-from data by default. However, customers can customize the system and use the additional fields for non-merge purposes (for example, if they are not using CDH), by adding another Contact Method element type mapping and selecting the appropriate fields in the drop-downs.

If customers customize and use the additional Email Alt fields for non-merge purposes, then an administrator can add another Contact Method element type mapping and select the appropriate fields in the drop-downs. Customers should ensure that CDH Installation check box is off first.

Note. Marketers should only use the new Email Alternative 2 and Email Alternative 3 in an Update Profile action if those fields are mapped to a CDM email contact method (a configuration).

CDH Impact on Matching Rules

The Online Marketing matching rules allow a profile field to match its values on data in other profile fields as well. The Use Expanded Matching Rules check box on the Matching Rules page turns this additional mapping on and off. By default, this flag will be off. As part of the delivered data, Online Marketing expanded matching rules will link Email Address to Email Alternative, Email Alternative 2, and Email Alternative 3. If the option is selected and Online Marketing tries to match based on the user-entered Email Address, the three alternative email fields will be searched as part of that same matching element.

Enable this option if CDH is installed, that is if merges are being used. Like other global options, the DES will need to be restarted after this flag is modified. Whenever the user saves after enabling the expanded matching attributes, a warning will appear informing the user that this flag should be turned off unless CDH is installed.

PeopleSoft Order Capture

This section discusses the impact of the Customer Data Hub (CDH) integration with CRM on the Order Capture application.

For complete details on PeopleSoft Order Capture implementation and business processes refer to *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook.*

If the customer has licensed CDH, Business Object Search pages will have a user check box option to use the Smart Search feature. The user will also be able to use Smart Search from Quick Create pages. If potential matches are found during Quick Create, they will appear on the Potential Duplicates page region with a match score that shows the likelihood of the match being a duplicate. The user can then select two or more potential duplicates and submit them for merge evaluation from the BO Search pages.

Components Using Smart Search

These Order Capture components use the Smart Search functionality:

- Order.
- Quote.
- Insurance Quote.

- Bulk Orders.
- Maintain Service (general service requests).
- Start/Stop Service (energy industry-specific).
- Product Application (financial services industry-specific).

Note. These components are variations of the RO_FORM component.

Customer Merges

Merge routines handle customer merges for the following transactions/components:

- Order/Quote.
- Bulk Order.
- Billing Account/Account.
- Churn Action History.

CDH Impact

The following areas in Order Capture are impacted by the CDH:

- Audit History.

  History of the customer updates will be maintained for Orders, Quotes, Number History, and Account Audit History.

- Catalog Security.

  After a customer merge, access to catalogs will be updated to reflect the updated customer information.

- Pricing.

  In the event of a BO merge, the *Price List Identifier* and *Price Rule Identifier* fields are updated to reflect the merge-to BO ID.

- Advisor.

  Advisor maintains a session history by customer. After a BO merge, the session table will be updated to reflect the merge-to BO ID.

Integrations between Order Capture and PeopleSoft Financials and Supply Chain Management

Customer merges can happen in CRM at any time. This raises the possibility that customer information on a transaction that was originally sent by Order Capture to FSCM via an EIP message is replaced on the CRM transaction due to a merge. This would cause the customer on the original transaction to be lost, because FSCM does not update customers information due to PeopleSoft merges. To ensure that it is always possible to map from the current customer BO_ID in CRM to the original customer BO_ID is SCM, a field that stores the original customer information has been added to the following EIPs:

- Fulfillment EIPs.
  - CRM_SALES_ORDER and SALES_CRM_ORDER_LOAD
  - CRM_QUOTE and SALES_CRM_QUOTE_LOAD
  - CRM_SALES_ORDER_CHANGE and SALES_ CRM_ORDER_CHANGE_LOAD
  - SALES_ORDER_ACKNOWLEDGEMENT
  - SALES_QUOTE_NOTICE
  - SALES_ORDER_CHANGE_NOTICE
  - SALES_ORDER_STATUS
  - SCM_GET_PROD_AVAIL and SCM_PROD_AVAIL
- Billing EIPs.
  - CONTRACT_RESPONSE
  - CONTRACT_REQUEST
  - CONTRACT_TXN
- Proposal Management EIPs.
  - OSA_ESA_PROPOSAL
  - OSA_ PROPOSAL_PRICE
  - OSA_ESA_PROPOSAL_STATUS

The existing mapping tables between CRM and SCM are not changed as part of this feature.

If CDH is installed, this mapping of CRM customers to SCM customers is maintained by the CDH data synchronization process, otherwise the mapping is maintained by the Customer Sync EIP.

Note. If PeopleSoft SCM is your fulfillment system, you must keep customer and product data synchronized in the two systems. The Product Sync EIP manages product data synchronization. If you have CDH installed, the CDH data synchronization process manages customer data synchronization; otherwise the Customer Sync EIP manages customer data synchronization.

PeopleSoft Multichannel Applications

This section discusses the impact of the Customer Data Hub (CDH) integration with CRM on Multichannel applications.

For complete details on PeopleSoft Multichannel Applications implementation and business processes refer to *PeopleSoft CRM 9.1 Multichannel Applications PeopleBook.*

ERMS

After the merge of business objects occurs within the CDH, CRM receives the result of the merge and responds to the inactivation of the merge-from BO. First, CDM merges customer data and then it passes on the control to the products, including ERMS, to update the inactivated BO IDs on their transactions.

The ERMS merge process performs the following steps:

- Updates merge-from BO ID on inbound email.
- Logs before and after values for the BO ID.

Note. We recommend that you stop the ERMS system when the merge process is expected to produce a high volume of merged BOs. This will generally be shortly after implementing CDH when the full sync is run for the first time.

Correspondence Management

PeopleSoft Correspondence Management (CM) provides a process to update the merged BO ID for contacts and customers on the outbound emails.

CM merges outbound emails by updating the merge-from BO ID with merge-to BO ID for contacts and customers. It also updates the same IDs on the interaction and sub-interaction records for the emails. The role type of a BO will not be changed by CDM. If merge-from BO IDs had different roles, the surviving (merge-to) BO will have multiple roles. Since CM stores other BO information such as First Name, Last Name, Display Name, Email Address, and Mailing Address, the merge process updates these fields as well.

Merge Now Send Later allows the user to merge the content of the outbound email now and schedule the email to be submitted later. If a BO merge takes place between the merge and the send, it could impact the content of the email. For example, primary address could change or even the name of the contact might change. The process will be able to continue since the previous name of the contact is now an alternate name and the address is still valid.

Chat

PeopleSoft Chat provides a process to update the merged BO ID for contacts, customers and sites on the chat detail.

Merge-from BO IDs on the Chat log will be updated with merge-to BO IDs for contacts, customers and sites. The system also updates the same IDs on the interaction and sub-interaction records for the chat session. Note that customer name is also stored on the chat log record and, therefore, is updated as well.

CTI

None of the CTI objects are impacted by the CDH integration. However, the CRM components or transactions that manage customer data that could be opened from CTI could be impacted.

- Customer merge during a call.

  If a page (for example, Case) was opened through CTI during the merge of the customer data associated with the merge, the interaction with the customer could be affected. The application will not be able handle this scenario since Tools will detect the background change in the data and won't allow the component to save the interaction.

- Accessing Customer 360-Degree View after a merge.

  The Customer 360-Degree View can be opened from CTI as well using the Customer ID. If the customer ID is invalid, the agent will be routed to the search page of Customer 360. For customer IDs that became inactive because of a merge, the system will behave as if the ID does not exist.

PeopleSoft CRM for Financial Services

Before you create a new Financial Account in CRM, CDH duplicate prevention logic determines whether a Customer connected to the Financial Account already exists in the system.

A new FSI setup option enables duplicate prevention logic in the Financial Account Creation EIP. If this option is set on the FSI Options page, a Match Rule in CDH is executed to determine if the business object on the Financial Account already exists before a financial account is created.

Example of Duplicate Prevention option on FSI Options page

If a matching record is found with a Match Score greater than the Match Threshold set up for the Match Rule, then this BO is assumed to be a duplicate of what exists on the Financial Account input XML message.

In this case, no new BO is created, but the new Financial Account created is tied to the matching BO. If no such record is found, then a new BO is created from the information on the input message and a Financial Account is created for that BO.

Appendix A

Business Object Delivered Web Services

This appendix discusses the following web services, and provides guidelines on how to view message elements:

- Customer
- Translate Field
- Interaction

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Business Processes and Web Services," Understanding Web Services

Customer

Oracle's PeopleSoft CRM delivers these service operations for the Customer (RB_CUSTOMER) web service:

- Get Customer.

  This operation takes a BO ID (as well as Role Type ID, BO Rel ID, BO ID 2, and Role Type ID 2) and returns information of the corresponding customer.

  Note. Version 1 of this web service was delivered with PeopleSoft CRM 9.0. Use version 2 of the web service for enhanced retrieval of contact method data.

- Search Contact.

  This operation takes search criteria for company contacts or consumers, and returns the information of business objects that satisfy the search criteria.

- Search Customer.

  This operation takes search criteria for companies, consumers, sites or partners, and returns information of business objects that satisfy the search criteria.

- Search Worker.

  This operation takes search criteria for workers and returns the information of workers that satisfy the search criteria.

- Add Company

  This operation takes information regarding a desired new company, creates the entry in the system, and returns the Set ID, BO ID, Role Type ID, and CUST ID of the newly created company.

- Add Consumer

  This operation takes information regarding a desired new consumer, creates the entry in the system, and returns the Set ID, BO ID, Role Type ID, CUST ID, and Person ID of the newly created consumer.

- Activate Customer

  This operation takes the BO ID and Role Type ID of a customer and activates that entry. The BO ID and Role Type ID are also returned by the operation, along with an updated time stamp value for the Last Maintained Date and Time.

- Inactivate Customer

  This operation takes the BO ID and Role Type ID of a customer and inactivates that entry. The BO ID and Role Type ID are also returned by the operation, along with an updated time stamp value for the Last Maintained Date and Time.

- Update Customer for Company

  This operation takes information to be updated for an existing company, updates the entry in the system, and returns the Set ID, BO ID, Role Type ID, and CUST ID of the newly updated company.

- Update Customer for Consumer

  This operation takes information to be updated for an existing consumer, updates the entry in the system, and returns the Set ID, BO ID, Role Type ID, CUST ID, and Person ID of the newly updated consumer.

- Add Site

  This operation takes information regarding a desired new site, creates the entry in the system, and returns the Set ID, BO ID, Role Type ID, and Site ID of the newly created site.

- Add Business Contact

  This operation takes information regarding a desired new business contact, creates the entry in the system, and returns the BO ID, Role Type ID, and Person ID of the newly created business contact.

- Add Contact to Company

  This operation takes information regarding a customer and the business contact to be added to that customer, creates the relationship in the system, and returns the Count Total and BO Rel ID.

- Add Contact to Site

  This operation takes information regarding a siteand the business contact to be added to that site, creates the relationship in the system, and returns the Count Total and BO Rel ID.

- Add Account Team Member or Owner to Customer

  This operation takes information regarding a customer and the account team member or owner to be added to that customer, creates the relationship in the system, and returns the Count Total and BO Rel ID.

This table provides the technical names, operation type, and messages names of the service operations that are related to the Customer web services:

Service Operation	***Operation Type***	***Request Message***	***Response Message***
Get Customer (RB_CUSTOMER_GET_CUSTOMER)	Synchronous	RB_CUSTOMER_GET_CUST_REQ	RB_CUSTOMER_GET_CUST_RES
Search Contact (RB_CUSTOMER_SEARCH_CNCT)	Synchronous	RB_CUSTOMER_SEARCH_CNCT_REQ	RB_CUSTOMER_SEARCH_CNCT_RES
Search Customer (RB_CUSTOMER_SEARCH_CUST)	Synchronous	RB_CUSTOMER_SEARCH_CUST_REQ	RB_CUSTOMER_SEARCH_CUST_RES
Search Worker (RB_CUSTOMER_SEARCH_WRKR)	Synchronous	RB_CUSTOMER_SEARCH_WRKR_REQ	RB_CUSTOMER_SEARCH_WRKR_RES
Add Company (RB_CUSTOMER_ADD_CUSTOMER)	Synchronous	RB_CUSTOMER_ADD_CUSTOMER	RB_CUSTOMER_ADD_CUST_RES
Add Consumer (RB_CUSTOMER_ADD_CONSUMER)	Synchronous	RB_CUSTOMER_ADD_CONSUMER	RB_CUSTOMER_ADD_CONSUMER_RESP
Activate Customer (RB_CUSTOMER_ACTIVATE_REQUEST)	Synchronous	RB_CUSTOMER_ACTIVATE_REQUEST	RB_CUSTOMER_ACTIVATE_RESPONSE
Inactivate Customer (RB_CUSTOMER_INACTIVATE_REQUEST)	Synchronous	RB_CUSTOMER_INACTIVATE_REQUEST	RB_CUSTOMER_INACTIVATE_RSP
Update Company (RB_CUSTOMER_UPDATE)	Synchronous	RB_CUSTOMER_UPDATE_REQUEST	RB_CUSTOMER_UPDATE_RESPONSE
Update Consumer (RB_CUSTOMER_UPDATE_CONSUMER)	Synchronous	RB_CUSTOMER_UPD_CONSUMER	RB_CUSTOMER_UPDATE_CONS_REQ
Add Site (RB_CUSTOMER_ADD_NEW_SITE)	Synchronous	RB_SITE_ADD_REQUEST	RB_SITE_ADD_RESPONSE
Add Business Contact (RB_CUSTOMER_ADD_BC)	Synchronous	RB_CUSTOMER_ADD_BC_REQ	RB_CUSTOMER_ADD_BC_RESP
Add Contact to Company (RB_CUSTOMER_CONTACT_REQUEST)	Synchronous	RB_CUSTOMER_CONTACT_REQUEST	RB_CUSTOMER_CNTCT_RESP

Service Operation	Operation Type	Request Message	Response Message
Add Contact to Site (RB_CUSTOMER_SITE_CONTACT)	Synchronous	RB_CUSTOMER_SITE_CONTACT_REQ	RB_CUSTOMER_SITE_CONTACT_RESP
Add Account Team Member or Owner to Customer (RB_CUSTOMER_ADD_ACCT_TEAM_MBR)	Synchronous	RB_CUSTOMER_ADD_ACCT_TMBR	RB_CUSTOMER_ACCT_TEAM_RESP

Translate Field

Oracle's PeopleSoft CRM delivers the Get Translate Codes service operation for the Translate Field (RB_TRANSLATEFIELD) web service. This operation takes the name of a translate field and returns a list of translate codes for that field.

This table provides the technical names, operation type, and messages names of the service operation that is related to the Translate Field web services:

Service Operation	Operation Type	Request Message	Response Message
Get Translate Codes (RB_TRANSLATEFIELD_GET)	Synchronous	RB_TRANSLATEFIELD_GET_REQ	RB_TRANSLATEFIELD_GET_RES

Interaction

Oracle's PeopleSoft CRM delivers the Create Interaction with Note service operation for the Interaction (RI_INTERACTION) web service. This operation provides the ability to create an interaction for a customer, contact or partner along with a note sub-interaction. The SetID, Interaction ID, and Sequence Number of the new transaction is returned in the response message.

This table provides the technical names, operation type, and messages names of the service operation that is related to the Interaction web service:

Service Operation	Operation Type	Request Message	Response Message
Create Interaction (RI_INTERACTION_CREATE)	Synchronous	RI_INTERACT_REQ	RI_INTERACTION_RES

Viewing Message Elements

You can view the elements and fields that are included in each service operation message through PeopleTools.

To view a list of field names and aliases for a particular message:

- Select PeopleTools, Integration Broker, Integration Setup, Messages.
- Enter the name of the message you want to view in the Message Name field and click Search.
- The Message Definition page appears. Click the message name link under the Parts grid.
- 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.

Appendix B

PeopleSoft Business Object Management Report

This appendix provides an overview of the report delivered for PeopleSoft Business Object Management.

Note. For samples of these reports, see the Portable Document Format (PDF) files that are published with your online documentation.

See Also

PeopleTools 8.52: PeopleSoft Process Scheduler PeopleBook

PeopleSoft Business Object Management Report: General Description

This table lists the report that is delivered for PeopleSoft Business Object Management.

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
RDRPT001 Contact Report	Lists all of the contact information in the Person component that pertains to the specific contact.	Click the Contact Snapshot toolbar button in the Person component for a contact. This report can be run either using Crystal Report or Oracle Business Intelligent Publisher (BI Publisher or BIP). BI Publisher is a template-based reporting solution that have been integrated into PeopleTools.	Not Applicable

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