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# PeopleSoft CRM 9.1 Application Fundamentals PeopleBook

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PeopleSoft CRM 9.1 Application Fundamentals PeopleBook
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**Appendix A**



**Appendix B**



 

# Oracle's PeopleSoft CRM Application Fundamentals Preface

This preface discusses:

- PeopleSoft business object management.
- PeopleSoft product and item management.
- PeopleSoft automation and configuration tools.
- PeopleSoft services foundation.
- PeopleTools PeopleBooks.

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**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.

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## PeopleSoft Business Object Management

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

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

- Business Object Management Basics.

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

- Data Management for Organization Business Objects.

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

- Data management for Individual Business Objects.

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

- Business Object Management.

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

- Customer and Worker Data Integrations.

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

### See Also

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

## 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*, "Oracle's PeopleSoft CRM Product and Item Management Preface"

## PeopleSoft Automation and Configuration Tools

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

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

- Correspondence Management.

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

- Automation Tools.

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

- Configuration Tools.

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

- Knowledge management.

  This part discusses the setup of Verity search.

- Business process management.

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

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

### See Also

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Oracle's PeopleSoft CRM Automation and Configuration Tools Preface"

## PeopleSoft Services Foundation

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

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

- Solution Management.

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

- Environmental Systems Research Institute (ESRI) integration.

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

- Transaction Billing Processor Integration

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

### See Also

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

## PeopleTools PeopleBooks

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

## PeopleBooks and the PeopleSoft Online Library

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

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

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

## Part 1

# Getting Started

**Chapter 1**
**Getting Started with PeopleSoft Customer Relationship Management 9.1 Applications**

 

Chapter 1

# Getting Started with PeopleSoft Customer Relationship Management 9.1 Applications

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

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

## PeopleSoft CRM 9.1 Application Fundamentals Overview

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

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

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

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## PeopleSoft CRM 9.1 Cross-Product Integrations

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

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

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

## PeopleSoft CRM 9.1 Applications Implementation

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

- A list of components that you must set up.

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

### *Other Sources of Information*

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

### *See Also*

*PeopleTools 8.52: PeopleCode API Reference PeopleBook*

 

## Part 2

# CRM Multi-Product Foundation

**Chapter 2**
**Working with Business Units and TableSet Controls**

**Chapter 3**
**Setting Up General Options**

**Chapter 4**
**Setting Up Security and User Preferences**

**Chapter 5**
**Working with Notes and Attachments**

**Chapter 6**
**Using Interactive Reports**

**Chapter 7**
**Setting Up Currencies**

**Chapter 8**
**Setting Up Credit Card Encryption**

**Chapter 9**
**Implementing Alternate Character**

**Chapter 10**
**Setting Up Auditing for Cases and Inbound Email**

**Chapter 11**
**Running Diagnostic Reports**

## Chapter 2

# Working with Business Units and TableSet Controls

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

## Understanding Business Units in PeopleSoft CRM

This section discusses:

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

### *Business Unit Structure*

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

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

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

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

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

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### Uses of Business Units in PeopleSoft CRM

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

Business units can control the following types of processing:

- Business logic.

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

- Reporting and analysis.

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

- Default values.

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

- Filtering of values for prompt fields.

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

- Security.

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

  See  and Chapter 4, "Setting Up Security and User Preferences," Setting System-Wide Security Options, page 69.

### Use of Business Units by CRM Applications

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

See  and Chapter 2, "Working with Business Units and TableSet Controls," Defining Business Units and TableSet Controls, page 16.

 

### *See Also*

*PeopleSoft Integrated FieldService 9.1 PeopleBook*

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

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

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

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

# Understanding TableSet Controls in PeopleSoft CRM

This section discusses:

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

## TableSet Control Terminology

The TableSet control architecture uses the following terminology:

### *TableSet*

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

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

### *SetID*

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

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

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

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

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

### *Control (or Setup) Table*

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

### *Record Group*

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

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

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

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

### *TableSet Controls*

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

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

 

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

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

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### *See Also*

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

*PeopleTools 8.52: PeopleSoft Application Designer Lifecycle Management Guide*

## TableSet Control Scenarios

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

- You have only one business unit.

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

- Multiple business units use all the same setup data.

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

- Multiple business units use separate sets of setup data.

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

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

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

## TableSet Control Example

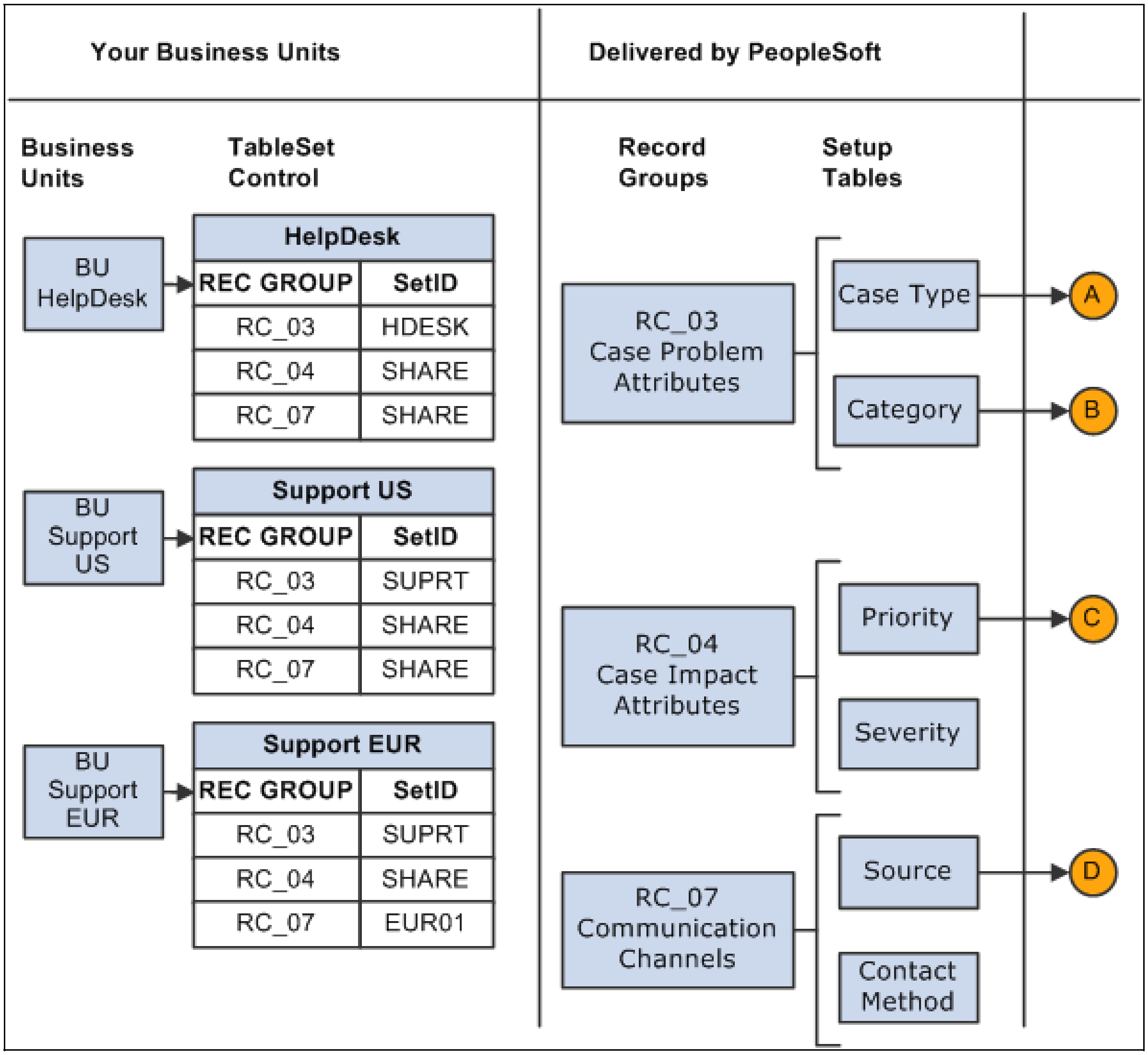
The following diagram illustrates the most complex TableSet control scenario: multiple business units use some shared setup data and some unique setup data.

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

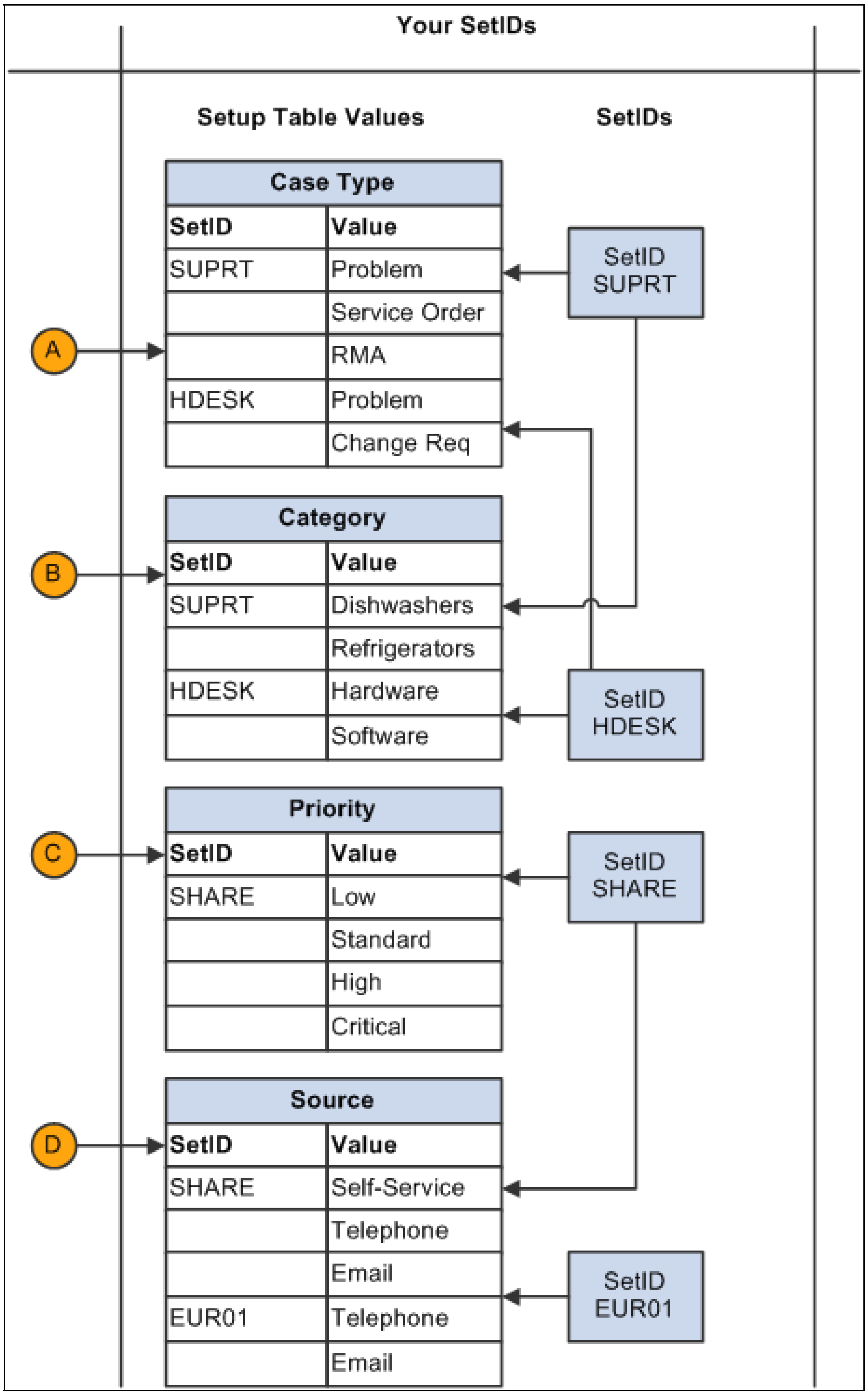
The organization has these requirements for sharing setup data:

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

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




Business units, SetIDs, and TableSet controls




Business units, SetIDs, and TableSet controls

Notice the following details in the diagram:

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

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

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

- The Case Type table is part of the record group for case problem attributes (RC_03). Therefore, the values for all tables that are in the RC_03 record group are split into help desk values (associated with the HDESK setID) and support values (associated with the SUPRT setID).

- The preceding diagram illustrates two different ways of handling setIDs when values are shared by some, but not all, business units:

  - You can have setIDs that correspond to the specific groups of values, as the setup for the record group for case problem attributes (RC_03) illustrates: there is one setID for the support business unit and another setID for the help desk business unit.

  - You can use a general-purpose setID, such as SHARE, for shared values and use other setIDs on an exception basis, as the setup for the communication channels record group (RC_07) illustrates.

- The system uses the default SETID table to determine default values for the setIDs that are associated with each record group in a new business unit. For example, a setID US100 might use US100 for most setIDs but use SHARE for departments. If you define US100 as the default setID for the a new business unit, then the new business unit also uses US100 for all setIDs except departments, for which it uses SHARE.

# Defining Business Units and TableSet Controls

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

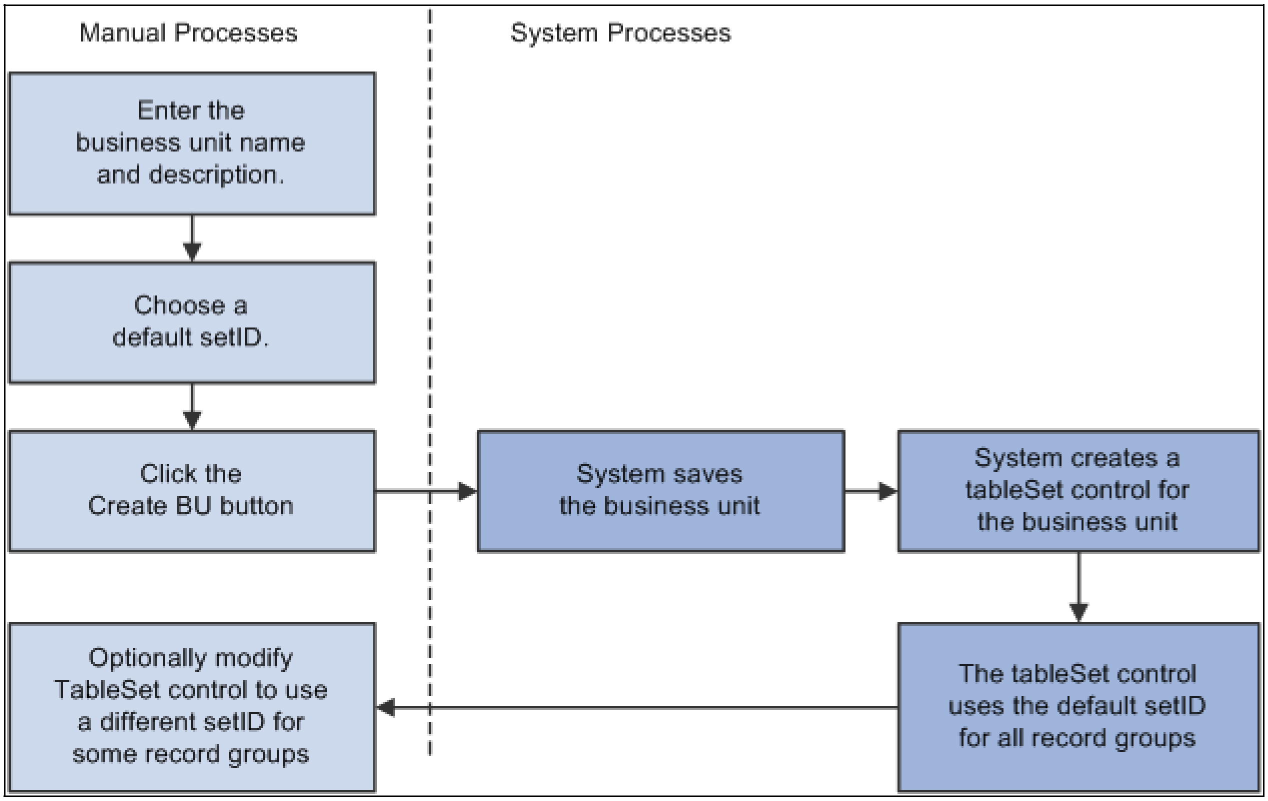
This section provides an overview of the TableSet control setup process and lists the pages used to define TableSet controls.

## TableSet Control Setup

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

This diagram illustrates the TableSet control setup process.




TableSet control setup process

To define a business unit's TableSet control:

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

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

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

2. Use the TableSet Control page to create additional setIDs.

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

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

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

See  and Chapter 4, "Setting Up Security and User Preferences," page 49.

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

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

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

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### See Also

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

*PeopleTools 8.52: Getting Started with PeopleTools*

## Pages Used to Define Business Units and TableSet Controls

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

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

## Chapter 3

# Setting Up General Options

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

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

## Understanding PeopleSoft CRM General Options

This section discusses:

- Automatic numbering.
- Installation options.
- Regions.

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

### Automatic Numbering

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

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

### Autonumbering Rules

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

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

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

See  and Chapter 3, "Setting Up General Options," Setting Up Automatic Numbering Rules, page 24.

### SetIDs and Autonumbering

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

### Last Numbers

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

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

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

See  and Chapter 3, "Setting Up General Options," Specifying Last Numbers, page 25.

### Last Number Types

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

For example, the following error might occur:

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

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

See  and Chapter 3, "Setting Up General Options," page 21.

### *PeopleTools GUIDs*

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

## Installation Options

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

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

  See  and Chapter 7, "Setting Up Currencies," Calculating Currency Exchange, page 159.

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

  See  and Chapter 3, "Setting Up General Options," Setting Calendar Options, page 32.

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

  See  and Chapter 9, "Implementing Alternate Character," page 173.

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

  See  and Chapter 4, "Setting Up Security and User Preferences," Setting Up Guest Users, page 107.

- What data is available to the HR HelpDesk application.

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

- How different applications perform contractual pricing and billing.

  See  and Chapter 27, "Defining Pricing Information for Services and Support Offerings," Establishing Pricing Records, page 549.

## Regions

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

See  and Chapter 3, "Setting Up General Options," Setting Up Regions, page 35.

# Setting Up Automatic Numbering

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

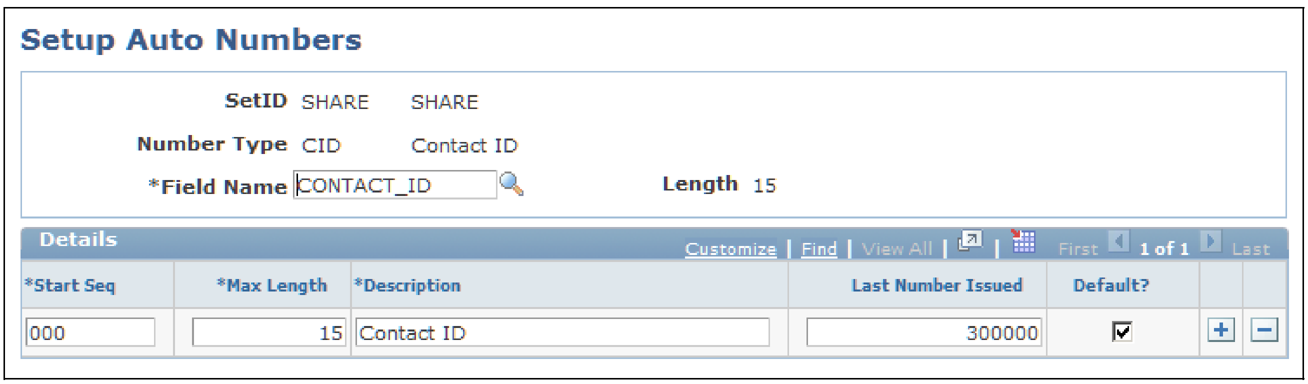
This section discusses how to set up autonumbering rules.

## Pages Used to Set Up Automatic Numbering Rules

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

## Setting Up Automatic Numbering Rules

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




Setup Auto Numbers page

---

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

---

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

See  and Chapter 3, "Setting Up General Options," Automatic Numbering, page 21.

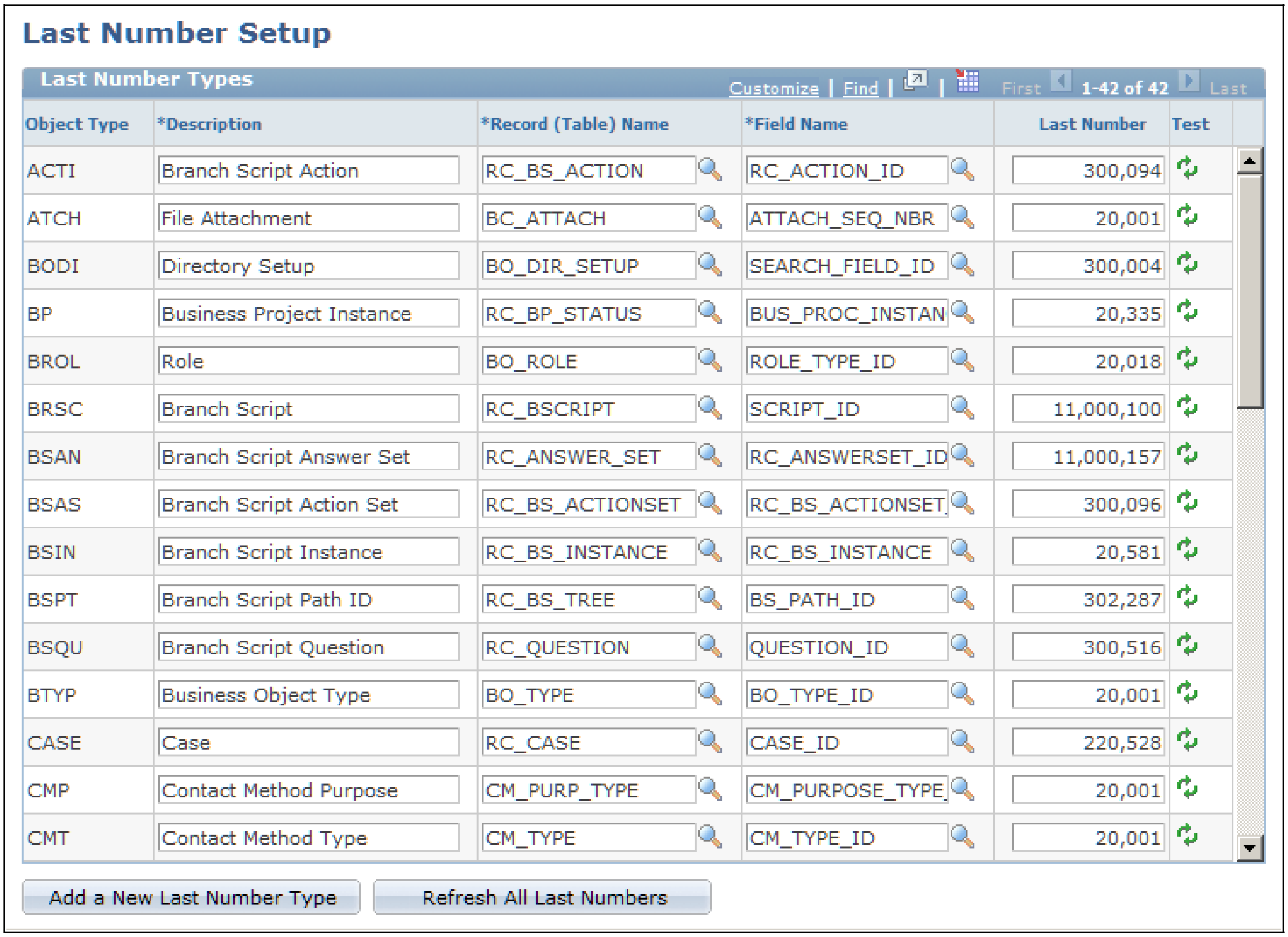
**Number Type** Displays the type of object whose rules you are setting up or displaying.

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

## Specifying Last Numbers

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



## Last Number Setup

Last Number Types — Customize | Find | First 1-42 of 42 Last

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

Add a New Last Number Type | Refresh All Last Numbers

Last Number Setup page

---

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

---

**Object Type**

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

**Record (Table) Name** and **Field Name**

Enter the table and field name of the object.

**Last Number**

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

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

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

**Add a New Last Number Type**

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

# Setting Up PeopleSoft CRM Application Installation Options

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

This section discusses how to:

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

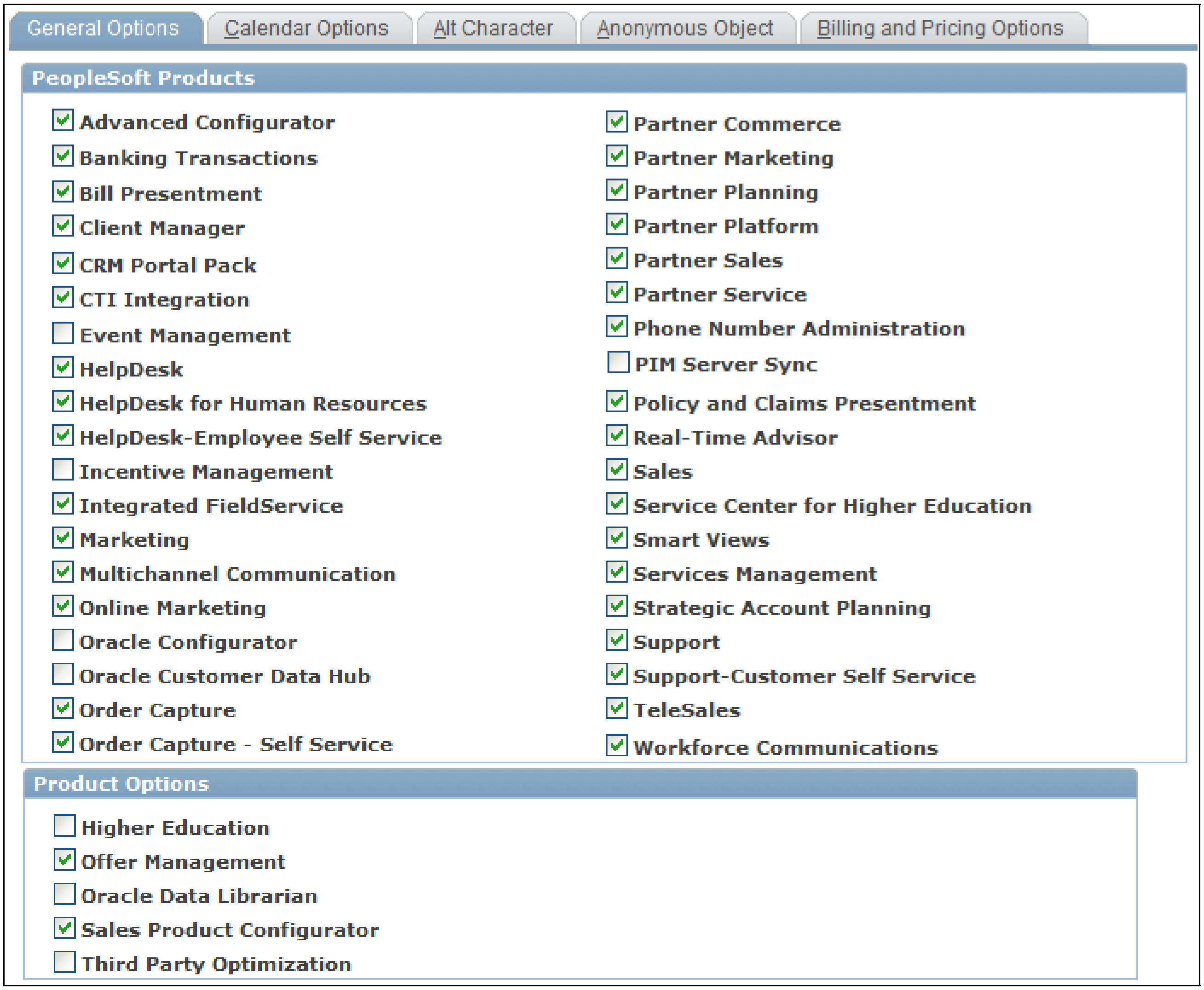
## Pages Used to Set Up PeopleSoft CRM Application Installation Options

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

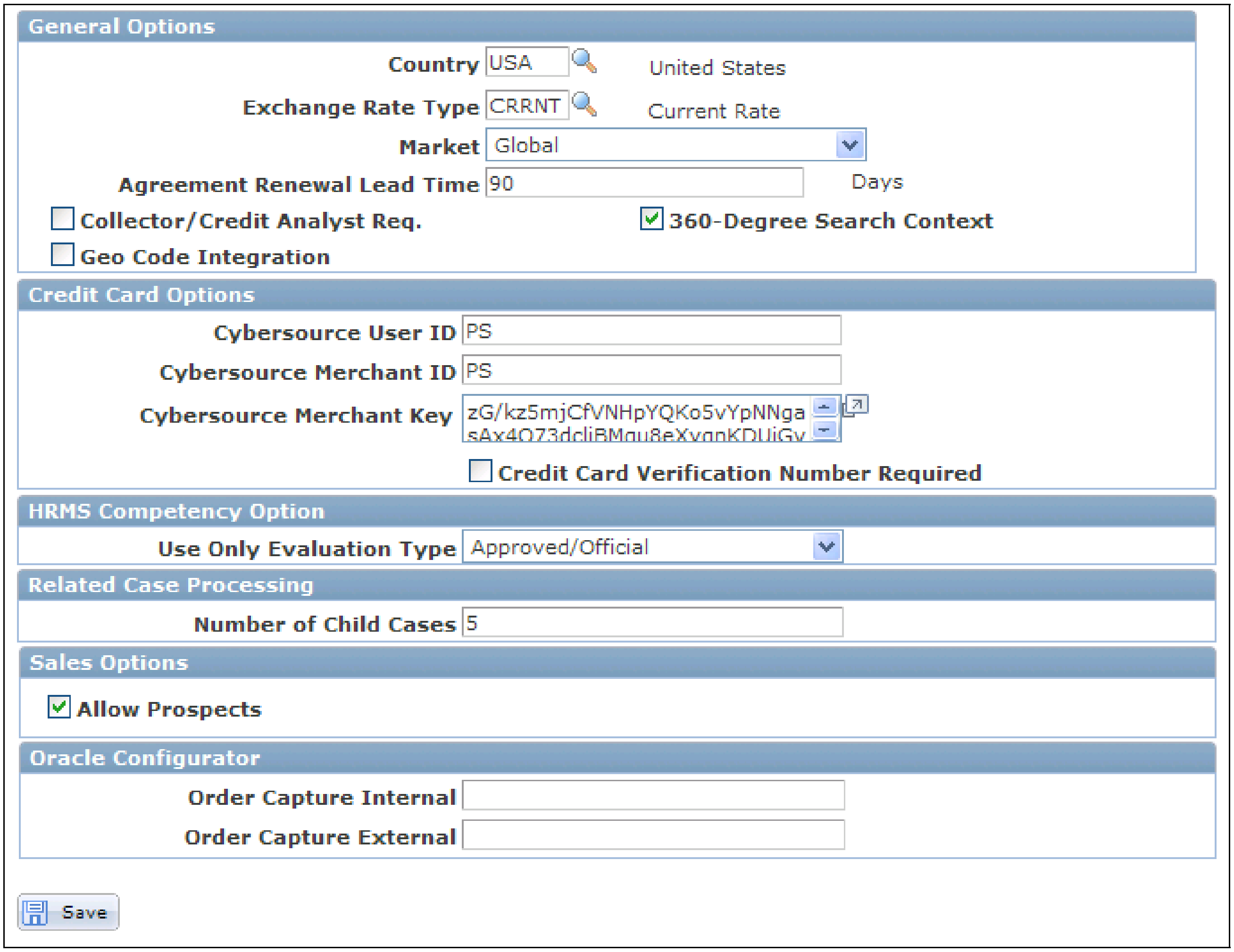
# Setting Up General Options

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




General Options page (1 of 2)




General Options page (2 of 2)

### *PeopleSoft Products*

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

### *General Options*

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

| | |
|---|---|
| **Collector/Credit Analyst Req.** (collector/credit analyst required) | Select this check box to make the Collector/Credit Analyst field a required field. |
| **Geo Code Integration** | This is used for Environmental Systems Research Institute (ESRI) integration.<br>See  and *PeopleSoft CRM 9.1 Services Foundation PeopleBook*, "ESRI Integration." |
| **360-Degree Search Context** | Select this option to control the behavior of the 360-Degree View search page. When you select this option, business object information from the 360-Degree View search page remains in system memory. The system uses this information to bypass the search page and retrieve the same business object information the next time the user accesses the 360-degree view as long the current user session is active and the interaction for that business object is still open. |

### Credit Card Options

| | |
|---|---|
| **Cybersource User ID, Cybersource Merchant ID** and **Cybersource Merchant Key** | Enter your Cybersource user ID, merchant ID and key. The information should be available when you sign up with Cybersource for their service. These fields and values are included in the SOAP message for security verification that occurs during the credit card authorization process. |
| **Credit Card Verification Number Required** | Select this option to make entering verification number mandatory when users enter credit card information as billing method for transactions such as cases, service orders, agreements, sales orders, and prepaid wireless services.<br>The system generates an error message if this option is selected and a user does not provide a verification number prior to submitting credit card data. In the case of an order, it is put on credit card hold if the verification number is not present. |

See  and Chapter 8, "Setting Up Credit Card Encryption," Understanding Credit Card Verification Number Encryption, page 162.

### HCM Competency Option

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

### Related Case Processing

**Number of Child Cases**

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

### Sales Options

**Allow Prospects**

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

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

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

### Oracle Configurator

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

---

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

---

**Order Capture Internal**

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

**Order Capture External**

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

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

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

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

### *See Also*

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

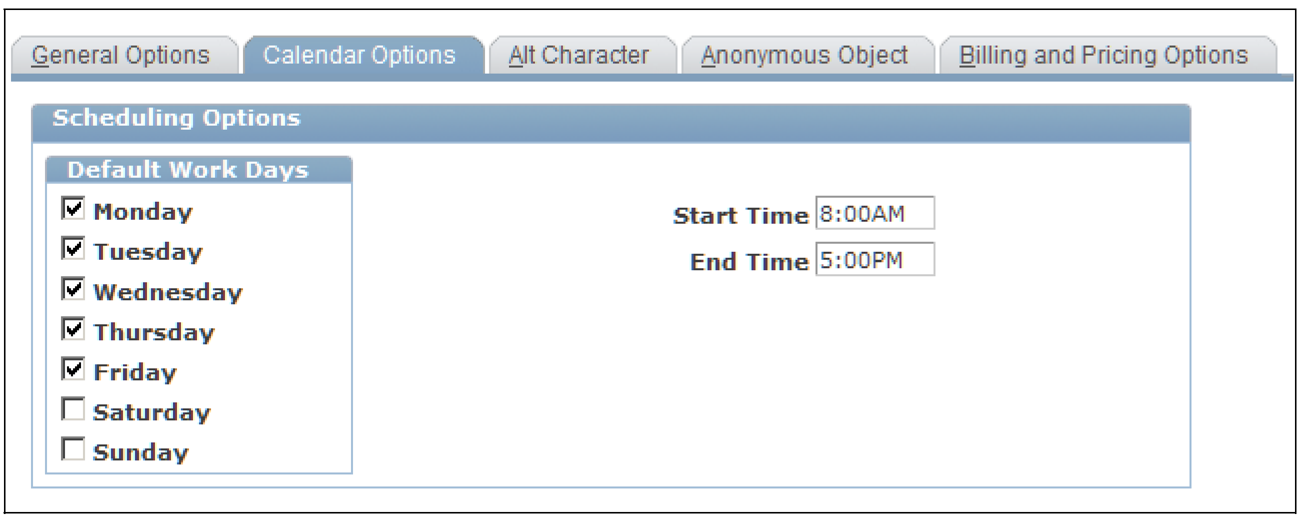
*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Managing Enterprise Integration for PeopleSoft CRM"

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

## Setting Calendar Options

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

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




Calendar Options page

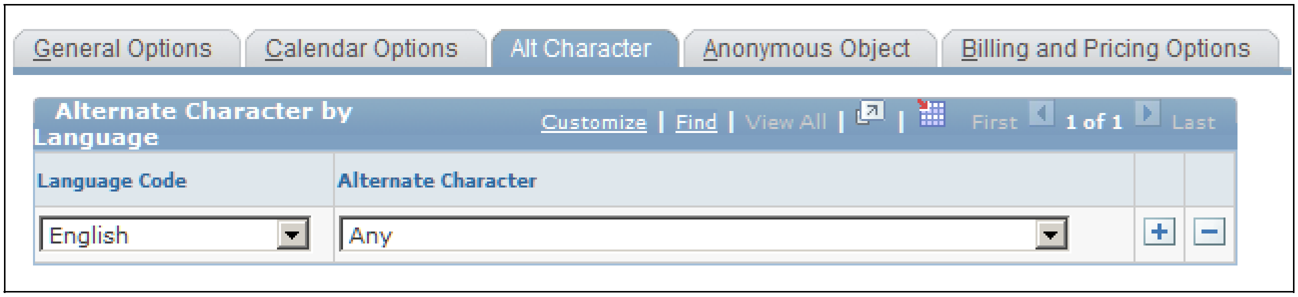
**Default Work Days** Select the check box for each standard workday.

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

## Setting Up Alternate Characters

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

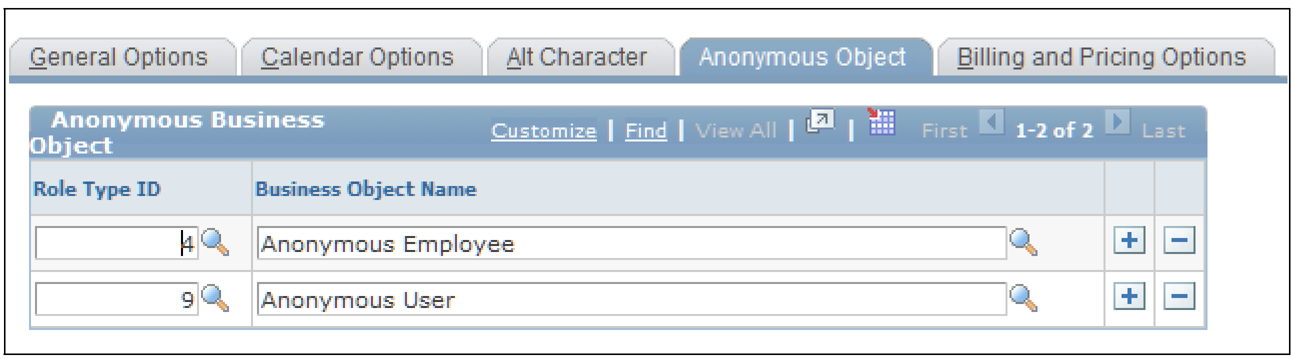



Alt Character page

See  and Chapter 9, "Implementing Alternate Character," page 173.

## Setting Up an Anonymous Business Object

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

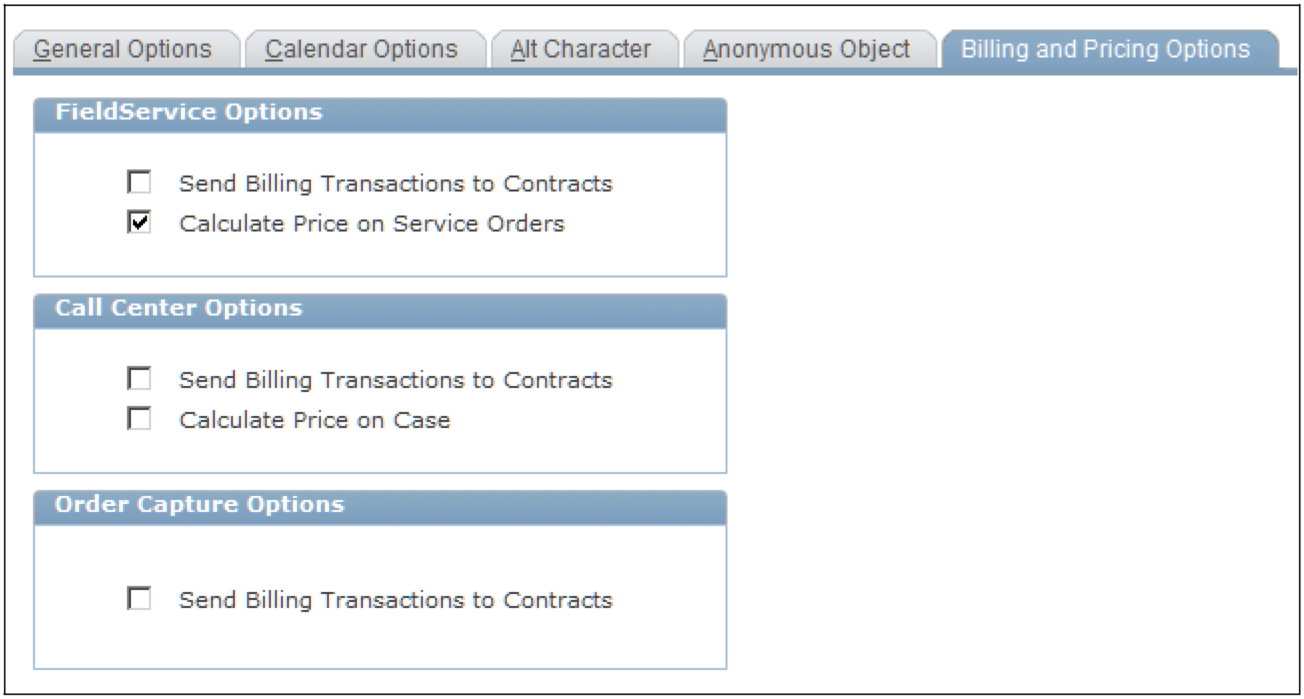



Anonymous Object page

See  and Chapter 4, "Setting Up Security and User Preferences," Setting Up Guest Users, page 107.

## Setting Up Billing and Pricing Options

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




Billing and Pricing Options page

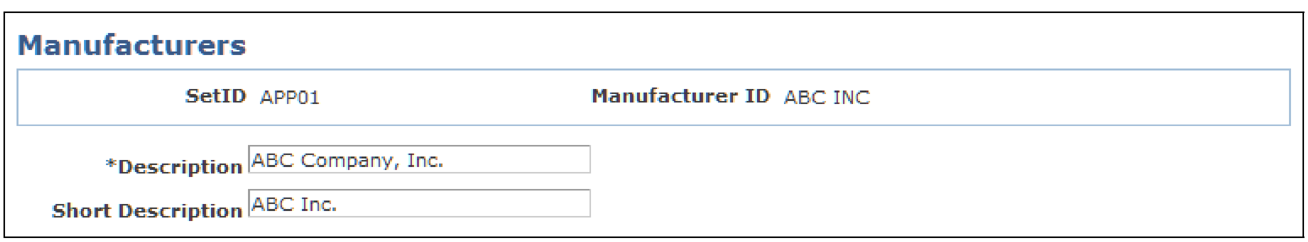
### *See Also*

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

Chapter 27, "Defining Pricing Information for Services and Support Offerings," page 549

## Setting Up Manufacturers

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




Manufacturers page

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

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

# Setting Up Regions

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

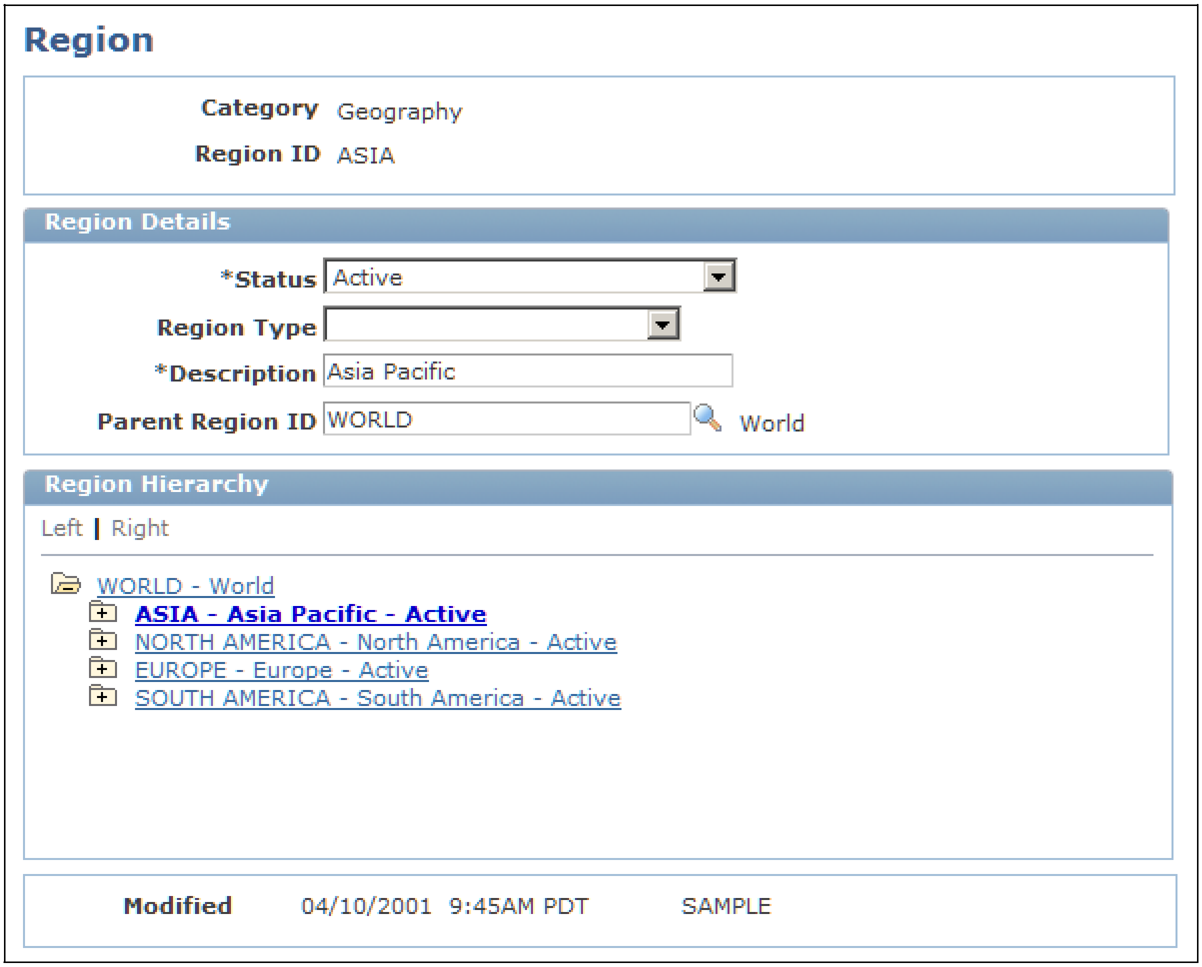
This section discusses how to set up regions.

## Page Used to Set Up Regions

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Region | RB_REGION | Set Up CRM, Common Definitions, Location, Region Codes, Region | Set up regions for use with various PeopleSoft CRM transactions. |

## Setting Up Regions

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




Region page

**Category**

Select to indicate how PeopleSoft CRM references this region:

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

**Status**

Select *Active* or *Inactive.*

**Region Type**

Select a type that describes the basis for regional divisions. General-purpose types are *Country*, *Phone*, *Postal*, *Region*, and *State*. *Region* is the most generic value, used when none of the other values apply.

Types that are specific to the communications industry are *Service Area*, *Postal Wireline*, and *Postal Wireless.* A service area is the top-level region for number management; you typically use postal wireline and postal wireless for service area subregions.

**Parent Region ID**

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

**Region Hierarchy**

Displays the entire regional hierarchy, including the current region.

# Setting Up Locations

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

This section discusses how to set up locations.

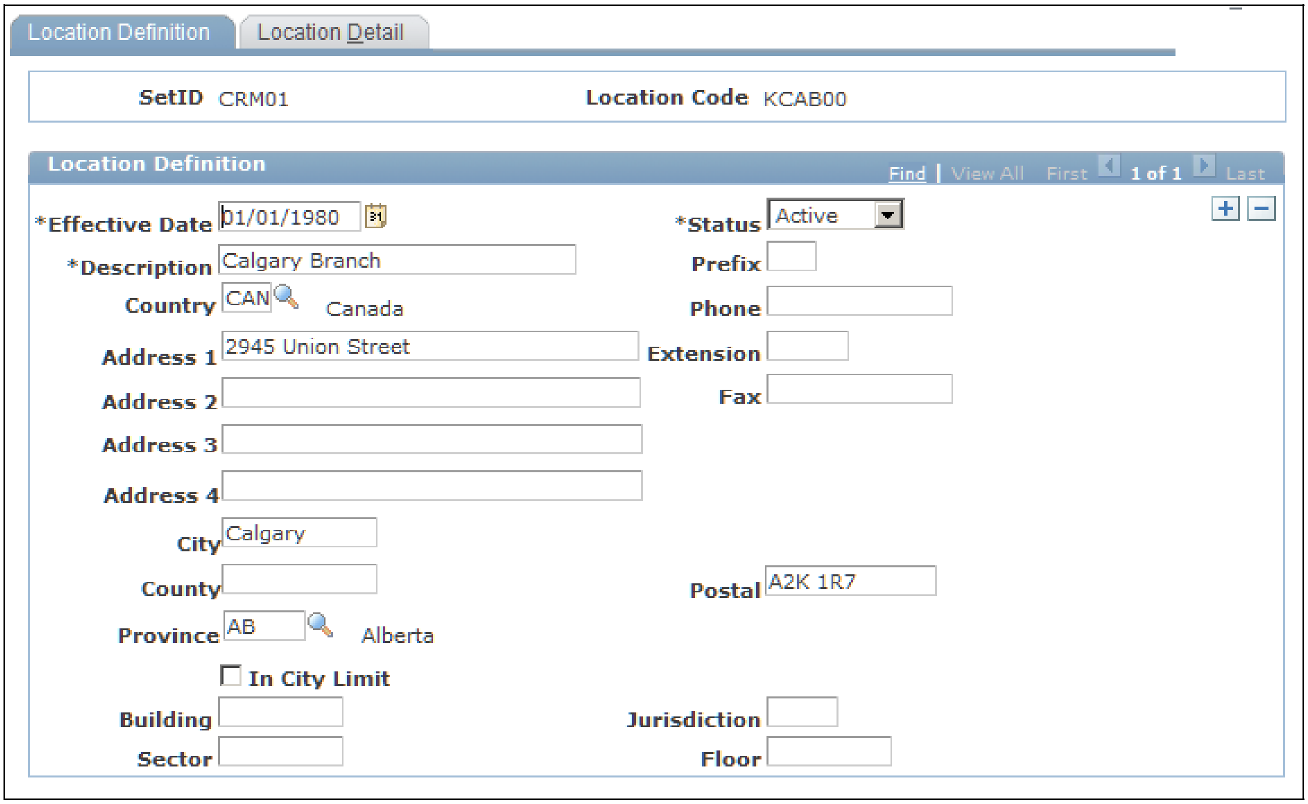
## Pages Used to Set Up Locations

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

## Defining Locations

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




Location Definition page

**Status**

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

**Country**

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

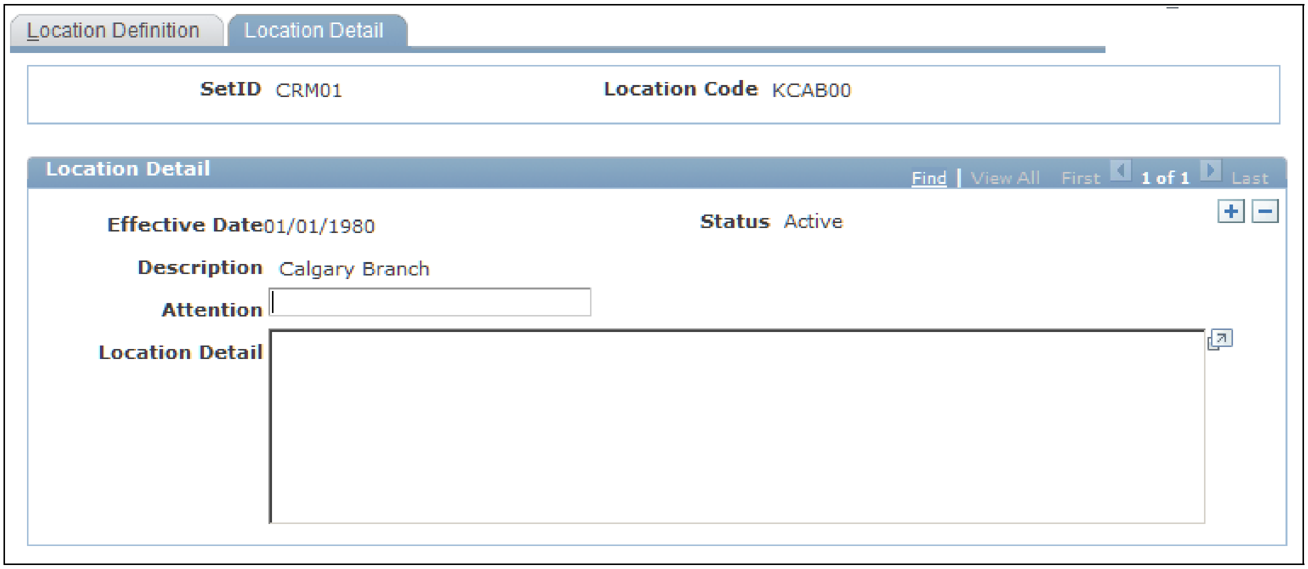
**In City Limit**

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

## Entering Location Details

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




Location Detail page

**Attention**

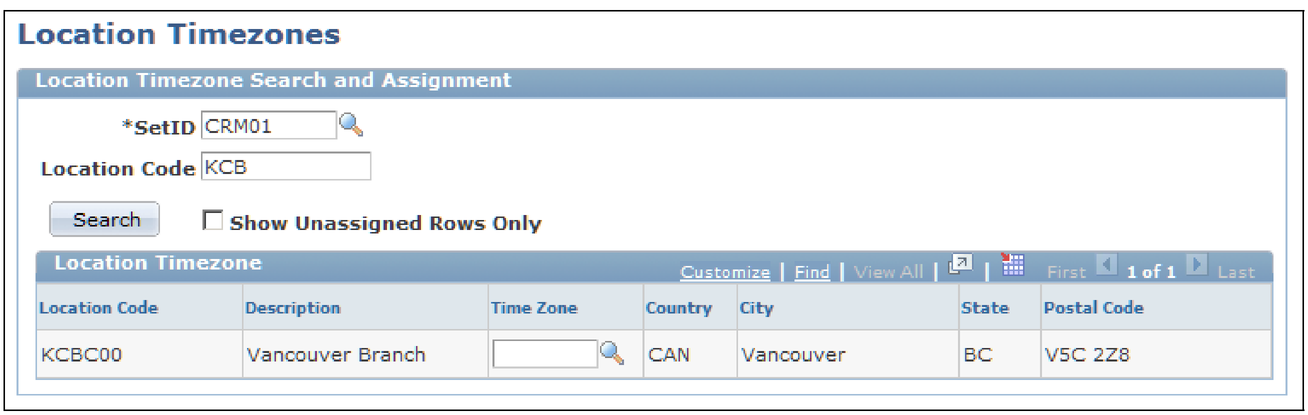
Enter the name of the person whose name should appear in the Attention field for correspondence for the location.

**Location Detail**

Enter descriptive text about the location.

## Associating Locations with Time Zones

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




Location Timezones page

**SetID**

Enter the setID for the locations that you want to view.

**Location Code**

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

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

# Setting Up Address Formats and Values

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

This section discusses how to set up address information.

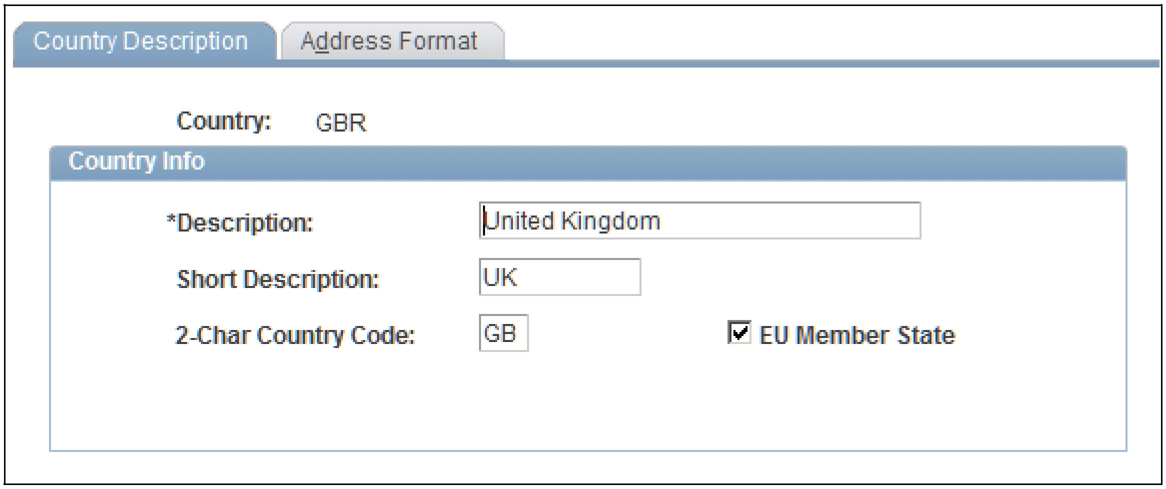
## Pages Used to Set Up Addresses

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

## Updating Country Definitions

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



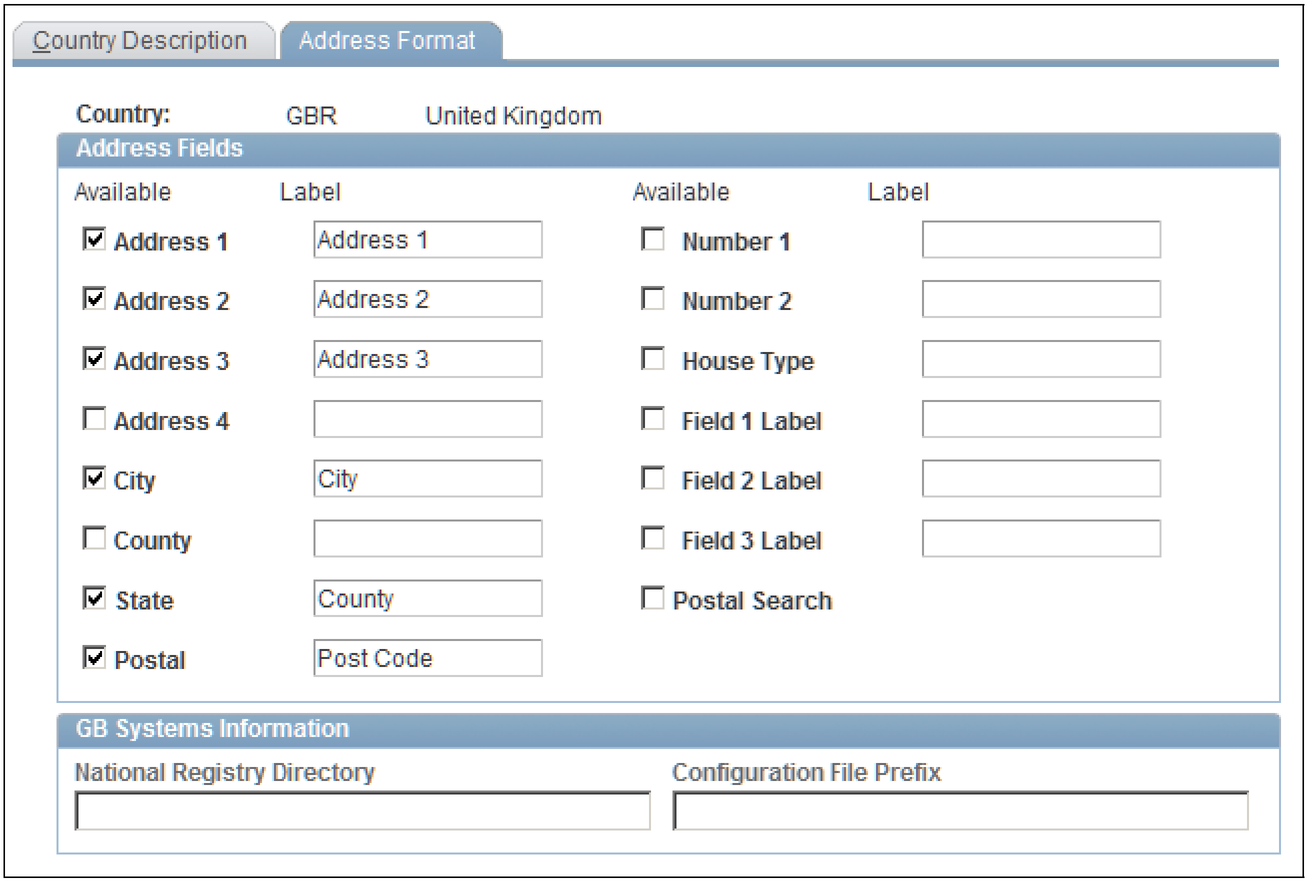

Country Description page

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

| | |
|---|---|
| **2-Char Country Code** (two-character country code) | Enter the value-added tax registration ID. |
| **EU Member State** (European Union member state) | Select this check box to use euro conventions to translate currencies for this country. |

## Specifying Address Formats

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




Address Format page

**Available**

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

---

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

---

**Label**

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

**Postal Search**

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

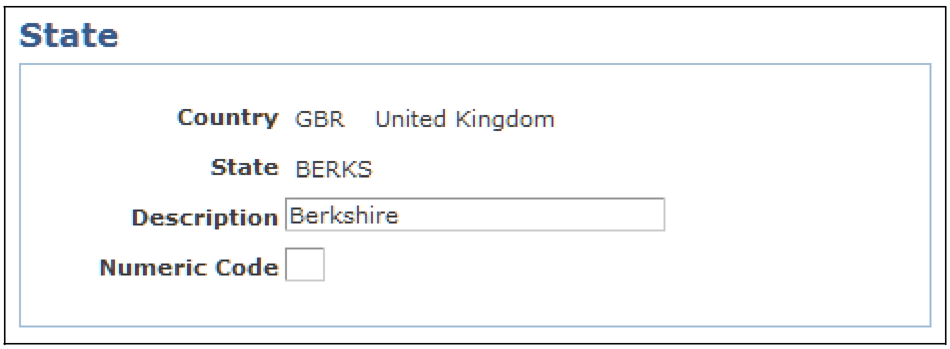
### *GB (Great Britain) System Information*

This group box is used for UK addresses. It displays only if you have the Information Management Toolkit installed and configured. With this GB Information Management application installed, you can look up UK addresses by entering a postcode and, optionally, a house name or number.

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

## Adding State or Province Codes

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




State page

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

| | |
|---|---|
| **Numeric Code** | Enter a code for statistical and reporting purposes. |

---

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

---

# Setting Up Salutation Codes

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

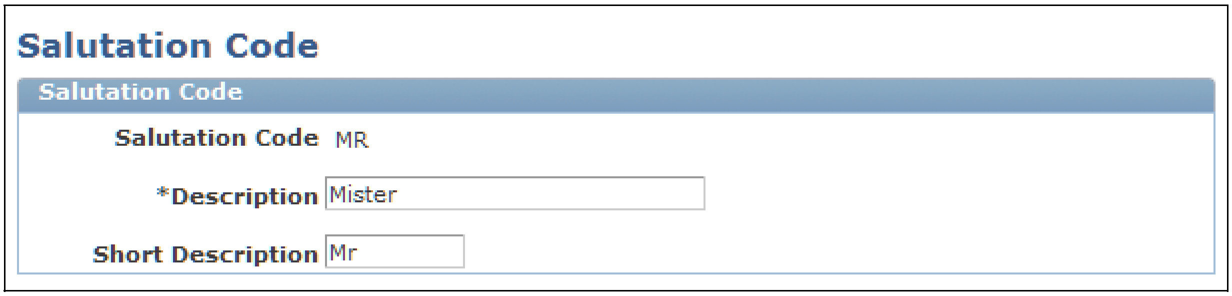
This section discusses how to set up salutation codes that are used in correspondence.

## Page Used to Set Up Salutation Codes

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Salutation Table | SALUTATION_TABLE | Set Up CRM, Common Definitions, Customer, Salutation Table, Salutation Code | Set up salutations for correspondence with customers. |

## Setting Up Salutation Codes

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




Salutation Code page

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

# Defining Alpha Indexes

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

## Understanding Alpha Indexes

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

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

### *See Also*

Chapter 4, "Setting Up Security and User Preferences," Defining Sales Preferences, page 96

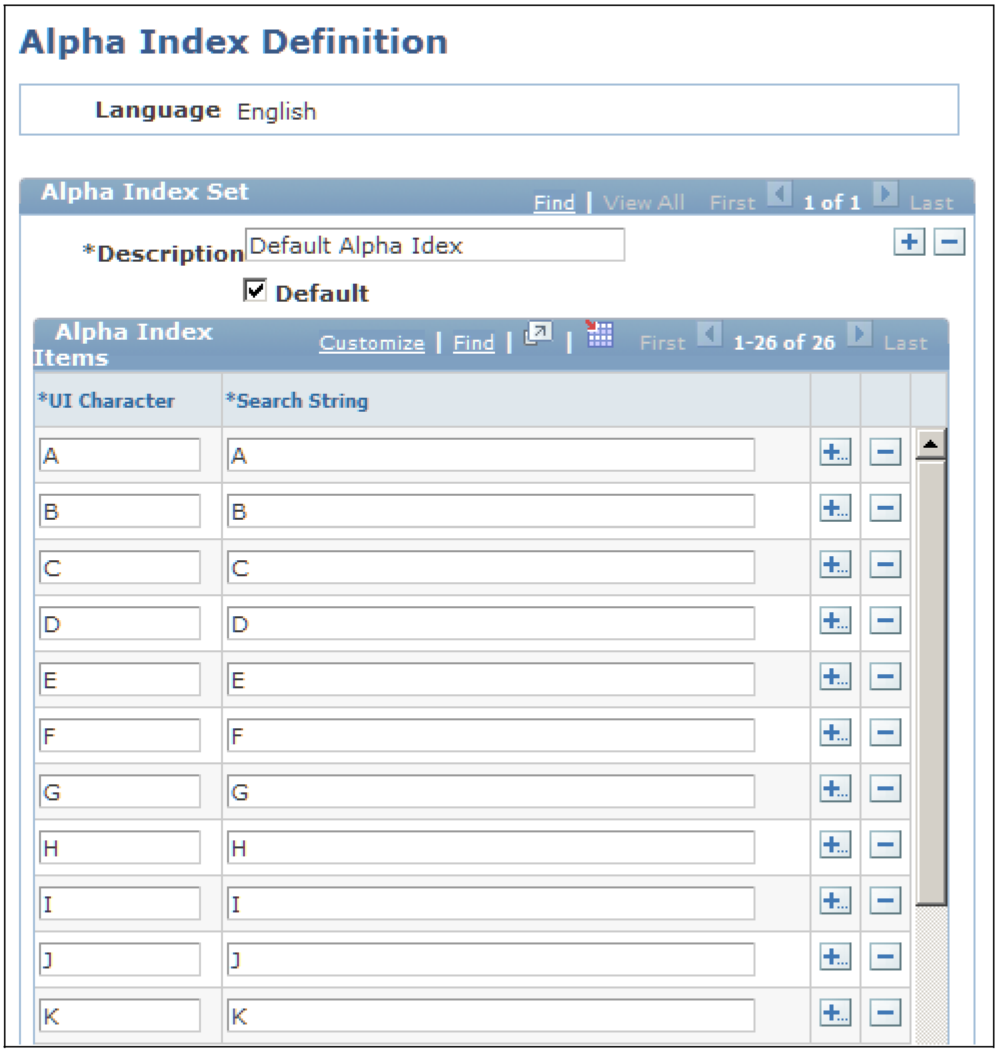
 

## Page Used to Define Alpha Indexes

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

## Defining Alpha Indexes

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




Alpha Index Definition page

**UI Character**

Enter the characters that identify this index on the user interface.

For example, to define an index that encompasses the letters A through C, enter *A-C.*

**Search String**

Enter the search characters, separated by commas.

For example, to search for names beginning with the letters A, B, or C, enter *A, B, C.*

# Setting Up Payment Terms

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

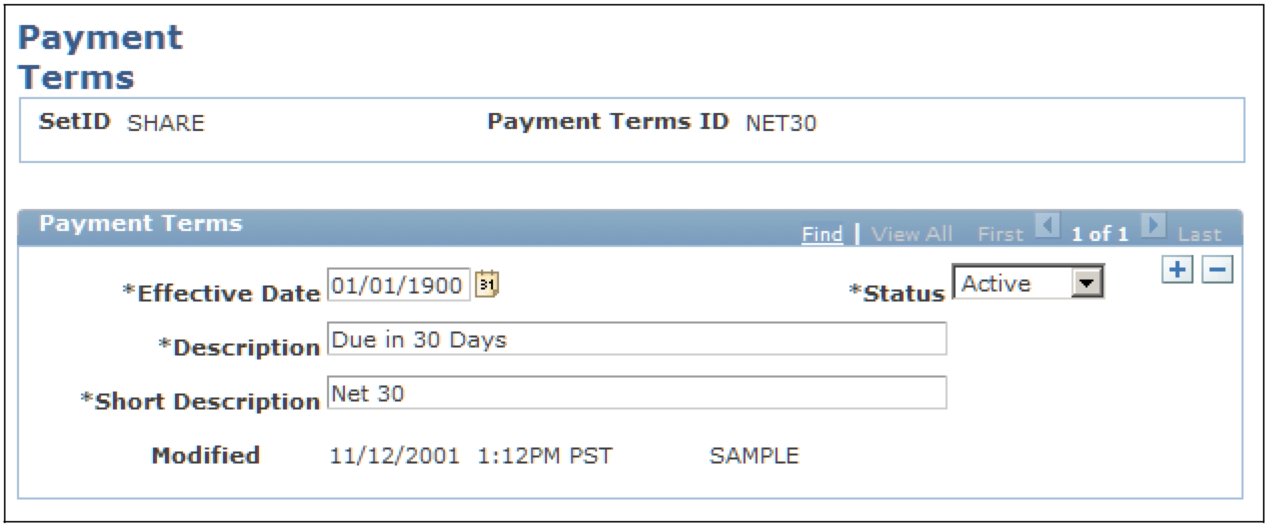
This section describes how to set up payment terms.

## Pages Used to Set Up Payment Terms

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

## Setting Up Payment Terms

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




Payment Terms page

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

# Defining Units of Measure

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

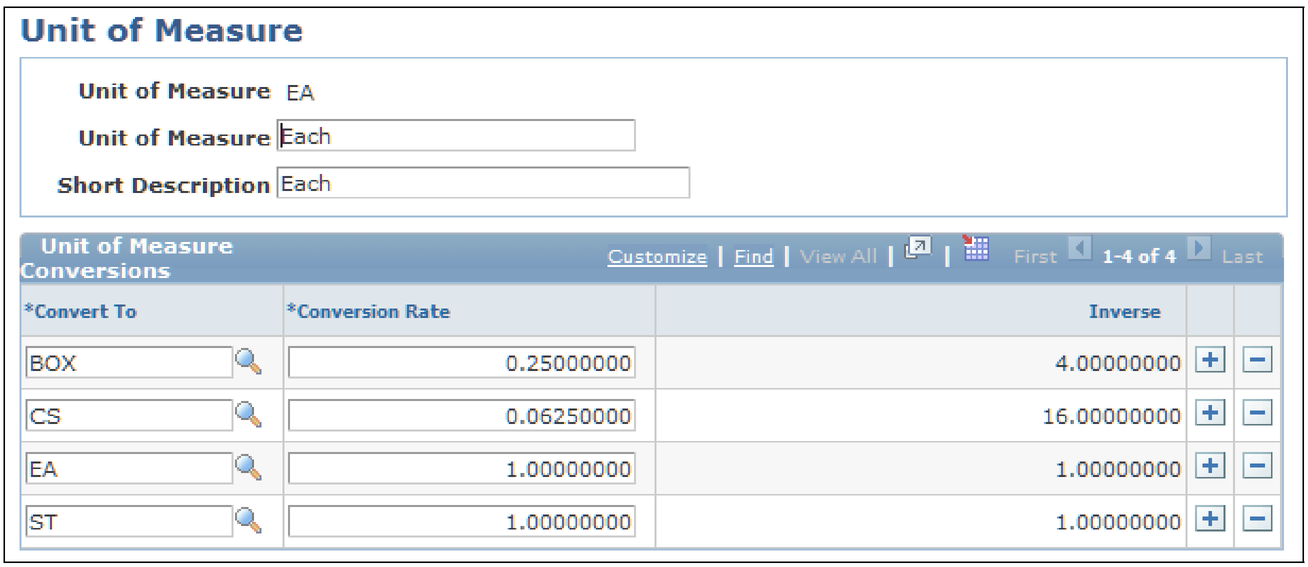
This section discusses how to define units of measure.

## Pages Used to Set Up Units of Measure

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

## Setting Up Units of Measure

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




Units of Measure page

**Conversion Rate**

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

### See Also

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

## Setting Up Data Archiving

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

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

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

See *PeopleTools 8.52: Data Management PeopleBook*

## Chapter 4

# Setting Up Security and User Preferences

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

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

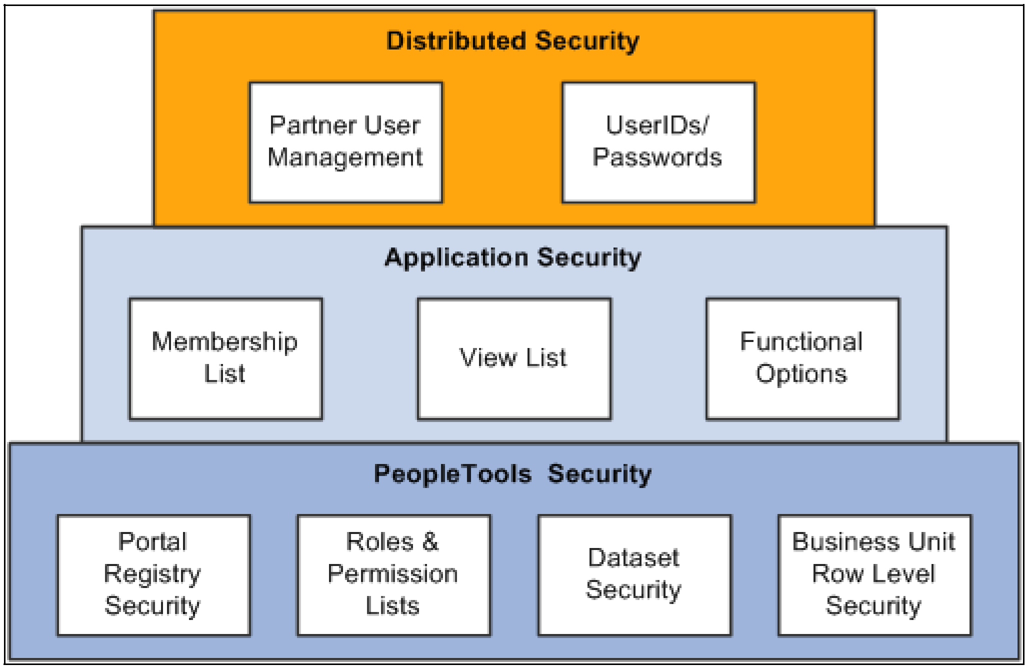
## Understanding PeopleSoft CRM Security

This section discusses:

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

### Security Building Blocks

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




Security building blocks

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

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

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

## Security Terminology

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

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

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

## PeopleTools Security

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

This section discusses

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

### *Portal Registry*

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

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

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

  See *PeopleTools 8.52: PeopleTools Portal Technologies PeopleBook*

### Roles and Permission Lists

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

### Dataset Security

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

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

It is also used in these applications and functions:

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

### *Business Unit Row-Level Security Options*

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

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

---

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

---

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

| ***System Security*** | ***Role of User ID*** | ***Row-Level Security*** |
|---|---|---|
| No security | The user ID is not linked to a role. | Not applicable. All users can access every object because you have not implemented security. |
| User-level security | The user ID is not linked to a role. | Defined in the application by key field security. |
| Role-level security | A user ID is normally assigned to a row-level security role. You can link a user ID to multiple roles, but not when you specify row-level security. | Defined by a row-level security role. If a user ID is not assigned to a row-level security role, then the user has access to menu items but not to any application pages with key fields that are enabled for row-level security. |
| Permission list-level security | All users in a permission list have the same level of security. | Users are limited to the key fields that are specified by the permission list that is assigned to their user IDs. |

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

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

### Preferred Markets and Security

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

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

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

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

### See Also

*PeopleTools 8.52: PeopleTools Portal Technologies PeopleBook,* "Understanding Portal Technology"

*PeopleTools 8.52: Security Administration PeopleBook*

## Application Security

This section discusses:

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

### Enterprise Administration

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

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

### CRM Application Security Terminology

This table lists terms related to security:

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

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

### *PeopleSoft CRM Application Security Framework*

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

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

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

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

---

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

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

---

Application security involves setting up and defining:

- Membership lists

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

- View lists

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

- Functional options

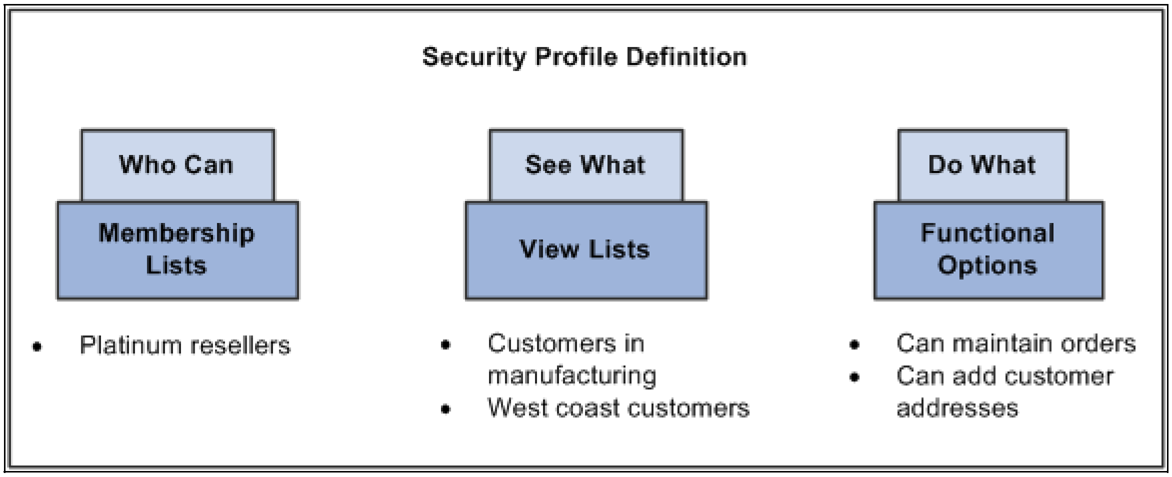
  Functional options define the functions (for example, order submission) that can be carried out by members of a membership list.

- Security profiles

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

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




Security profile definition

### Security Objects

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

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

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

### *Dynamic and Static Membership Lists*

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

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

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

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

### *Dynamic and Static View Lists*

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

---

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

---

View List Security Objects that are delivered as system data:

| *View List Security Object* | *Security Object Type* | *Application* |
|---|---|---|
| Catalog | View List | Order capture |
| Customer | View List | All |
| Financial Account | View List | Financial services and insurance |
| Hold Code | View List | Order capture |
| Performance Metric | View List | Marketing |

### *Implicit View Lists*

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

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

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

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

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

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

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

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

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

### Functional Options

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

### Functional Option Groups

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

Example:

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

### Functional Option Codes

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

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

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

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

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

### *Functional Options Conflict Resolution*

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

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

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

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

1. Single Security Profile Functional Option Conflict Resolution:
   - Bob is a financial account holder with the account number of 2001.
   - Bob is associated with a single security profile (PROFILE_1).
   - The security profile is associated with a functional option that allows him to transfer money up to 300 USD.
   - Bob's account (2001) allows him transfer money up to 1000 USD.
   - The conflict resolution option on the Transfer Money functional option is set for maximum amount always to win.
   - *Resolution:* Bob can transfer up to 1000 USD.
2. Multiple Security Profile Functional Option Conflict Resolution:
   - ABC Warehouse is a partner to the enterprise.
   - ABC Warehouse is explicitly associated to a security profile (PROFILE_2) either through a dynamic membership list domain or a static membership list domain.
   - There is also a generic security membership list for all partners (PROFILE_1), which means it includes the Partner ABC Warehouse.
   - There are no functional options attached to the view list for both security profiles.
   - For PROFILE_1, the administrator has specified functional options so that users can submit orders for amounts up to 5,000 USD.

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

     The ability to add addresses has been granted.
   - The conflict resolution option on the Order Submit functional option is set for the maximum amount always to win.

     The Add Address functional option is set so that the revoke option does not win.
   - *Resolution:* The ABC Warehouse Partner can submit orders up to 10,000 USD and add addresses.

### *Enabling Functional Options*

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

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

### Business Object Search System Processing

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

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

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

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

### Strategic Account Planning Security

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

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

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

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

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

### Financial Services Industry Security

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

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

### Catalog Security

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

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

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

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

---

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

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

### How Security Information is Processed at Runtime

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

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

- Application Engines
  - RSEC_DAEMON

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

    Handles the writing of secure objects to list tables.

 

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

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

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

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

- API Based Direct Data Access

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

- API Based SQL Data Access

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

- SQL/Query Based Data Access

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

- Functional option Conflict Resolution

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

 

- Executing Functional Options

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

- Update to Data Cache

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

- Update to Security Framework

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

---

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

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## Distributed Security

This section discusses:

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

### *Delegated Administration*

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

 

### *Role Can Grant Hierarchies*

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

| ***Role*** | ***Can Grant Roles*** |
|---|---|
| Enterprise channel manager | Partner admin<br>Partner sales manager<br>Partner Representative |
| Partner administrator | Partner sales manager<br>Partner representative |
| Partner sales manager | Partner representative |

### *Creating Security User Groups*

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

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

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

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

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

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

### *See Also*

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

*PeopleTools 8.52: Security Administration PeopleBook*, "Understanding PeopleSoft Security"

 

# Setting System-Wide Security Options

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

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

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

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

 

## Understanding Row-Level Security Views

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

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

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

### *Security View Names*

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

| *View Name Suffix* | *Security Type* |
|---|---|
| NONVW | No security. |
| OPRVW | User security. |
| CLSVW | Permission list security. |

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

### *Row-Level Security for Users*

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

## Understanding Sensitive Worker Information

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

 

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

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

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

---

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

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### *See Also*

Workforce Management

## Predefined Security Roles and Sample Users

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

This section discusses:

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

 

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

### PeopleSoft CRM System IDs

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

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

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

| User ID and Password | Description |
| --- | --- |
| SYSADM | System Administrator |
| EMPL | Employee |
| MGR | Line Manager |

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

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

| User ID and Password | Description |
| --- | --- |
| CCAG | Call Center Agent |
| CCMGR | Call Center Manager |
| CRAWLING / WELCOME | HR Call Center Level One Agent USA (E-Business HCM) |

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

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

| User ID and Password | Description |
|---|---|
| SSS_REC2 | Higher Education Recruiter |
| SSS_REC3 | Higher Education Recruiter |
| SSS_RECMGR | Higher Education Recruiting Manager |
| SUPPAA | Support Applications Administrator |
| TECHSPEC | Technical Specialist |

### PeopleSoft Integrated FieldService User IDs

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

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

| ***User ID and Password*** | ***Description*** |
|---|---|
| TECHSUP | Technical Support |

### *PeopleSoft Financial Industry User IDs*

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

| ***User ID and Password*** | ***Description*** |
|---|---|
| FSIADMIN | FSI Administrator |
| FSIAGENT | FSI Agent |
| FSISS | FSI Self-Service |
| FSIMGR | FSI Account Manager |

### *PeopleSoft Communication Industry User IDs*

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

| ***User ID and Password*** | ***Description*** |
|---|---|
| CSPADMIN | CSP Administrator |
| CSPAGENT | CSPA Agent |
| CSPSS | Communication Self-service Consumer |
| GUESTCOMM | Guest - Communication |

### *PeopleSoft High Tech Industry User IDs*

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

| ***User ID and Password*** | ***Description*** |
|---|---|
| HITECHADMIN | High Technology Administrator |

| User ID and Password | Description |
|---|---|
| HITECHAGENT | High Technology Agent |
| HITECHSS | High Technology Self-Service |
| HITECHGUEST | High Technology Guest |

### PeopleSoft Government Industry User IDs

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

| User ID and Password | Description |
|---|---|
| GOVADMIN | Government Administrator |
| GOVAGENT | Government Agent |
| GOVSS | Government Self Service |
| GOVGUEST | Government Guest |
| GOVMGR | Government Manager |

### PeopleSoft Marketing User IDs

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

| User ID and Password | Description |
|---|---|
| CAMPMGR | Campaign Manager |
| MKTAA | Marketing Application Administrator |
| MKTANAL | Marketing Analyst |
| MKTCRT | Marketing Creative |
| MKTMGR | Marketing Manager |

| User ID and Password | Description |
|---|---|
| MKTRES | Marketing Researcher |
| SRVCONA | Service Contract Administrator |
| TELAG | Telemarketing Agent |
| TELFFLAG | Telemarketing Fulfilment Agent |
| TELMGR | Telemarketing Manager |
| TELSLAG | Telemarketing Sales Agent |

### PeopleSoft Sales User IDs

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

| User ID and Password | Description |
|---|---|
| SLSREP | Inside Sales Rep |
| FLDSLSREP | Field Sales Rep |
| SLSMGR | Sales Manager |
| LDQUAL | Lead Qualifier |
| SLSAA | Sales Application Administrator |
| CHSLSMGR | Channel Sales Manager |

### PeopleSoft Order Capture and Services Management User IDs

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

| ***User ID and Password*** | ***Description*** |
|---|---|
| OCADMIN | Order Capture Administrator |
| OCMGR | Order Capture Manager |
| OCREP | Order Capture Representative |
| FSIADMIN | FSI Administrator |
| FSIAGENT | FSI Agent |
| CSPADMIN | CSP Administrator |
| CSPAGENT | CSPA Agent |
| INSADMIN | Insurance Administrator |
| INSAGENT | Insurance Agent |
| ENERGYADMIN | Energy Administrator |
| ENERGYAGENT | Energy Agent |

### *PeopleSoft Order Capture Self Service User IDs*

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

| ***User ID and Password*** | ***Description*** |
|---|---|
| CPCUST | Customer |
| CPSS | Customer Self Service |
| CSPSS | Communication Self-Service Consumer |
| GUEST | Guest |
| COMGUEST | Guest - Communication |

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

### PeopleSoft Real-Time Advisor User IDs

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

| User ID and Password | Description |
|---|---|
| RADADMIN | Advisor Administrator |
| RADUSR | Advisor User |
| RADMGR | Advisor Manager |

### PeopleSoft Quality User IDs

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

| User ID and Password | Description |
|---|---|
| QAANAL | Quality Analyst |
| QAAA | Quality Application Administrator |
| QAMGR | Quality Manager |

### *PeopleSoft Insurance Industry User IDs*

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

| ***User ID and Password*** | ***Description*** |
|---|---|
| INSADMIN | Insurance Administrator |
| INSAGENT | Insurance Agent |
| INSSS | Insurance Self-Service |
| INSGUEST | Insurance Guest |

### *PeopleSoft Energy Industry User IDs*

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

| ***User ID and Password*** | ***Description*** |
|---|---|
| ENERGYADMIN | Energy Administrator |
| ENERGYAGENT | Energy Agent |
| ENERGYSS | Energy Self-Service |
| ENERGYGUEST | Guest - Energy |

### *PeopleSoft Multichannel Applications User IDs*

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

| ***User ID and Password*** | ***Description*** |
|---|---|
| ERMSMGR | ERMS Manager |
| ERMSAGENT | ERMS Agent |

### *PeopleSoft Partner Relationship Management User IDs*

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

| User ID and Password | Description |
|---|---|
| ECM | Enterprise Channel Manager |
| PADMIN | Partner Administrator |
| PMGR | Partner Manager |
| PREP | Partner Rep |
| PMKTA | Partner Marketing Analyst |
| PMKTM | Partner Marketing Manager |

### PeopleSoft Strategic Account Planning User IDs

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

| User ID and Password | Description |
|---|---|
| AASH | Account Administrator |
| ACCOUNTMGR | Account Manager |

### PeopleSoft Wealth Management User IDs

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

| User ID and Password | Description |
|---|---|
| WMADMIN | Wealth Management Administrator |
| FA | Financial Advisor |

## Pages Used to Set System-Wide Security Options

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

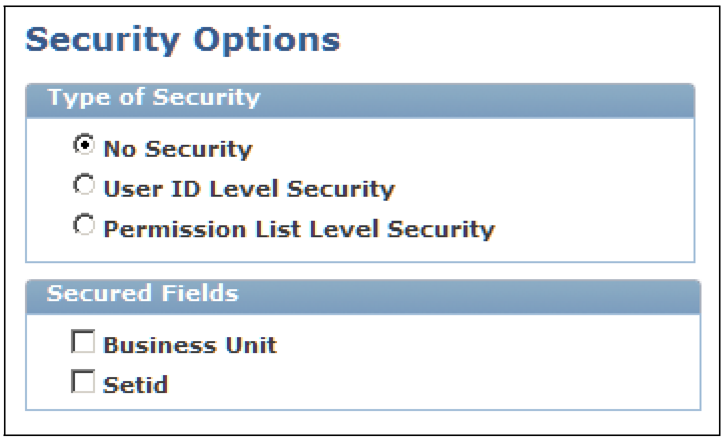
| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Apply Security Setups | RUN_FIN9001 | Set Up CRM, Security, Apply Security Setups, Apply Security Setups | Initiate the process that activates the selected security options. |
| Security Views Names | SECURITY_VIEWS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

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

## Selecting System-Wide Security Options

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




Security Options page

### *Type of Security*

**No Security**

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

**User ID Level Security** and **Permission List Level Security**

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

### *Secured Fields*

**Business Unit**

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

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

## Activating Security Options

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


Apply Security Setups page

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

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

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

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

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

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

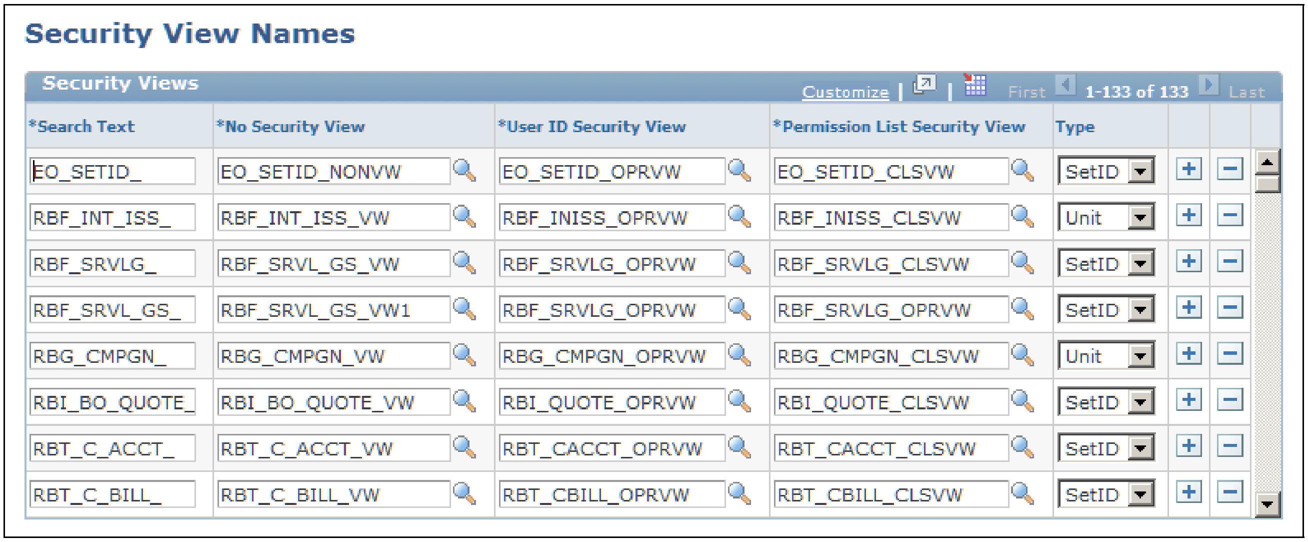
Application Engine programs can also be submitted online from the Application Engine Request page. PeopleTools, Application Engine, Request AE)

See *PeopleTools 8.52: Application Engine PeopleBook*, "Managing Application Engine Programs"

## Defining View Security

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



Security View Names

Security Views Customize | First 1-133 of 133 Last

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

Security View Names page

**Search Text**

Displays the view name prefixes supplied by each application. When you run the Apply Security Setups process, the system searches for view names that begin with these prefixes. If a view name begins with a prefix from this list, the process changes the view name extension to match the security type that you selected in the security options. The system stores the list in the SEC_VIEW_NAMES table, where you can review or update this information. You can also configure new security views for the system on this page.

---

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

---

**No Security ViewUser ID Security View** and **Permission List Security View**

Displays the different security views for the view name prefixes that are supplied by each application.

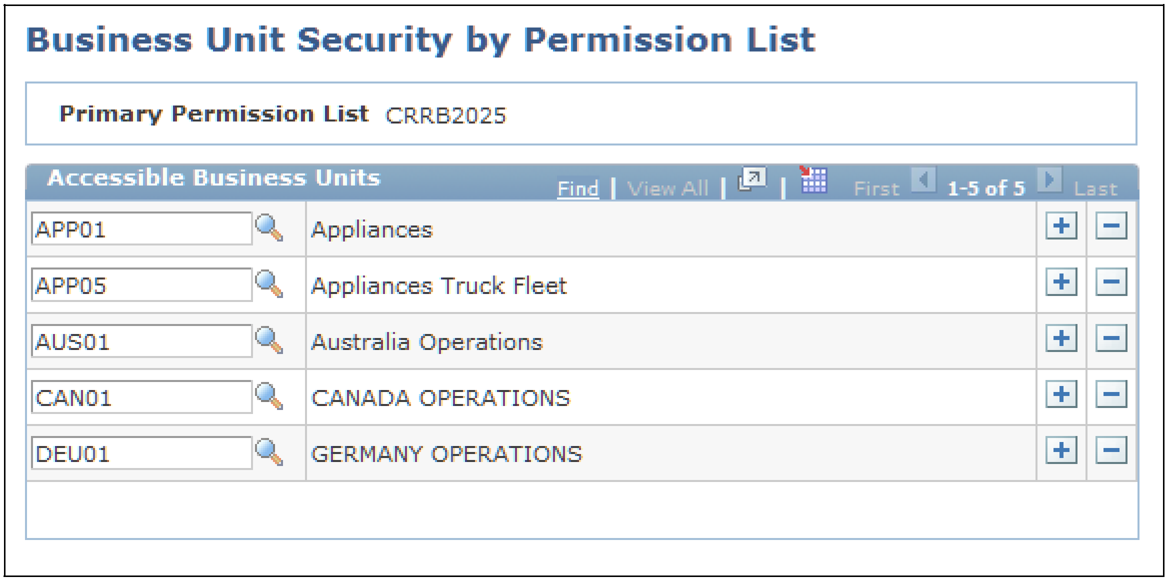
When you run the Apply Security Setups process, the Application Engine process can switch to the Permission List Security View (CLSVW), the User ID Security View (OPRVW) or the No Security View (NONVW) based on the option you selected on the Security Options page.

**Type**

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

## Defining Business Unit Security by Permission List

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




Business Unit Security by Permission List page

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

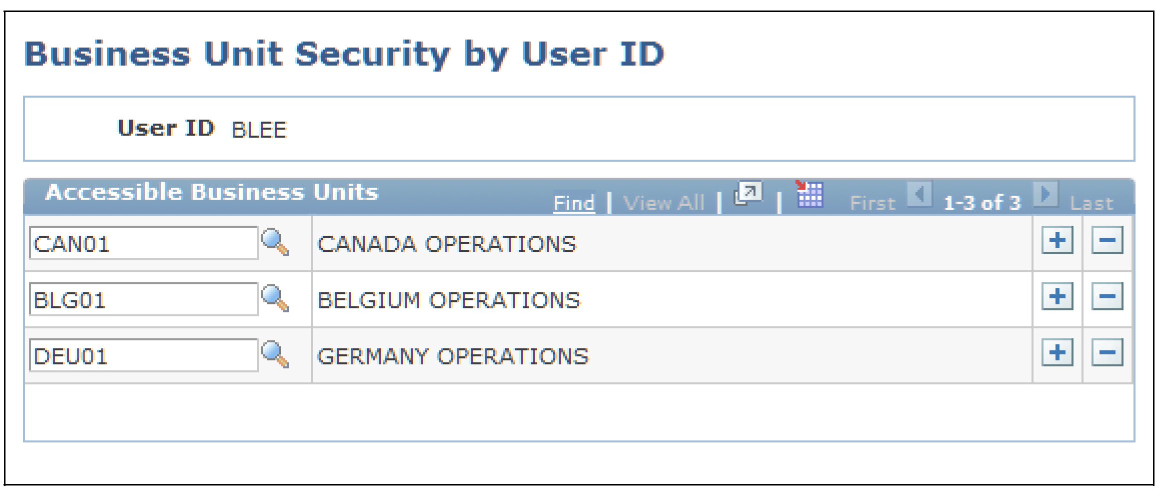
---

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

---

## Defining Business Unit Security by User ID

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




Business Unit Security by User ID page

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

---

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

---

## Defining TableSet Security by Permission List

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


TableSet Security by Permission List page

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

## Defining TableSet Security by User ID

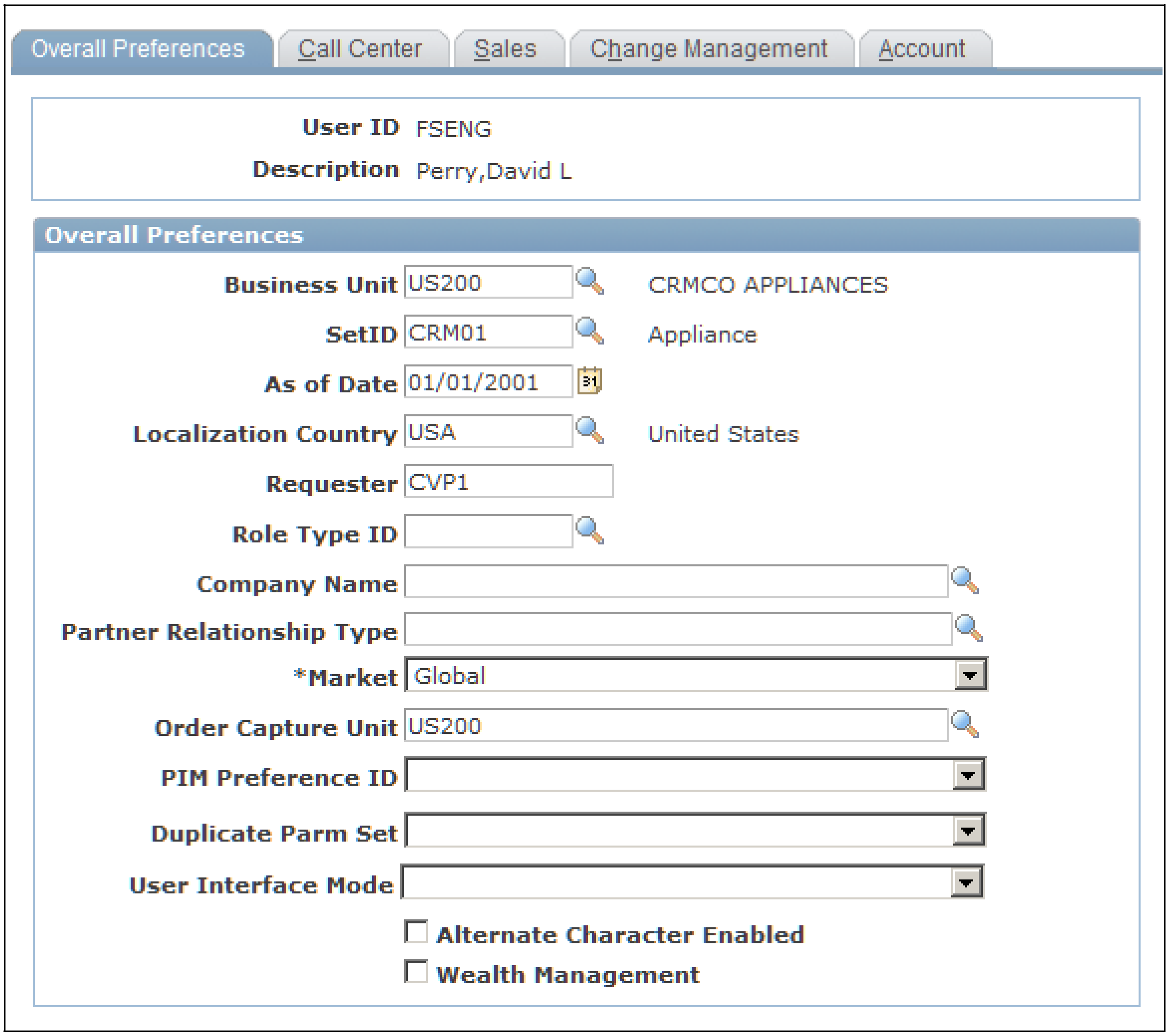
Access the TableSet Security by User ID page (Set Up CRM, Security, TableSet by User ID, TableSet Security by User ID).


TableSet Security by User ID page

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

## Defining Overall Preferences

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




Overall Preferences page

---

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

---

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

**Localization Country** Select the country code for the localization country.

**Requester** Enter a default requester ID to appear on requisitions that are initiated by this user from the Manage Material component in PeopleSoft Integrated FieldService or the RMA Form (return material authorization form) component in PeopleSoft Support.

**Important!** If you integrate with PeopleSoft Purchasing, the requester ID must be a valid user ID and requisition requester in PeopleSoft Purchasing.

**Role Type ID** If a self-service user has multiple roles, select the role type to use as the default when signing in to the self-service site. The only supported role types for self-service users are individual consumer (role type 9) and contact (role type 8).

**Company Name** For self-service users who can represent multiple companies, select the company whose data appears when the contact first signs in.

**Partner Relationship Type** Select the type of partner relationship that the user has with the company. This relationship appears when the contact first signs in. For every Partner Users that uses the PARTNER portal must have a user preference record that identifies the Partner Company and the relationship type of the user with the Partner Company.

**Market** Select the preferred market for the user ID. The preferred market associated with the user ID determines what data and functionality are available to the user.

**Order Capture Unit** Select the order capture unit that you want the system to use as a default for the user. This business unit is used by Order Capture, Order Capture Self Service, and product catalog.

The system uses this business unit to derive the setID that is used to retrieve product catalogs the selected user can access (including PeopleSoft Order Capture Self Service guest user IDs). If this business unit is not specified, the system looks up the order capture business unit (marked as default business unit) that is defined under Set Up CRM, Business Unit Related, Order Capture Definition, Business Unit, Order Capture Definition.

See  and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook,* "Defining Order Capture Business Units."

**PIM Preference ID** (personal information manager preference ID) Select the preference ID that you want the system to use if the user is a personal information manager.

**Duplicate Parm Set** This field is not used now in PeopleSoft CRM. No value is required for this field.

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

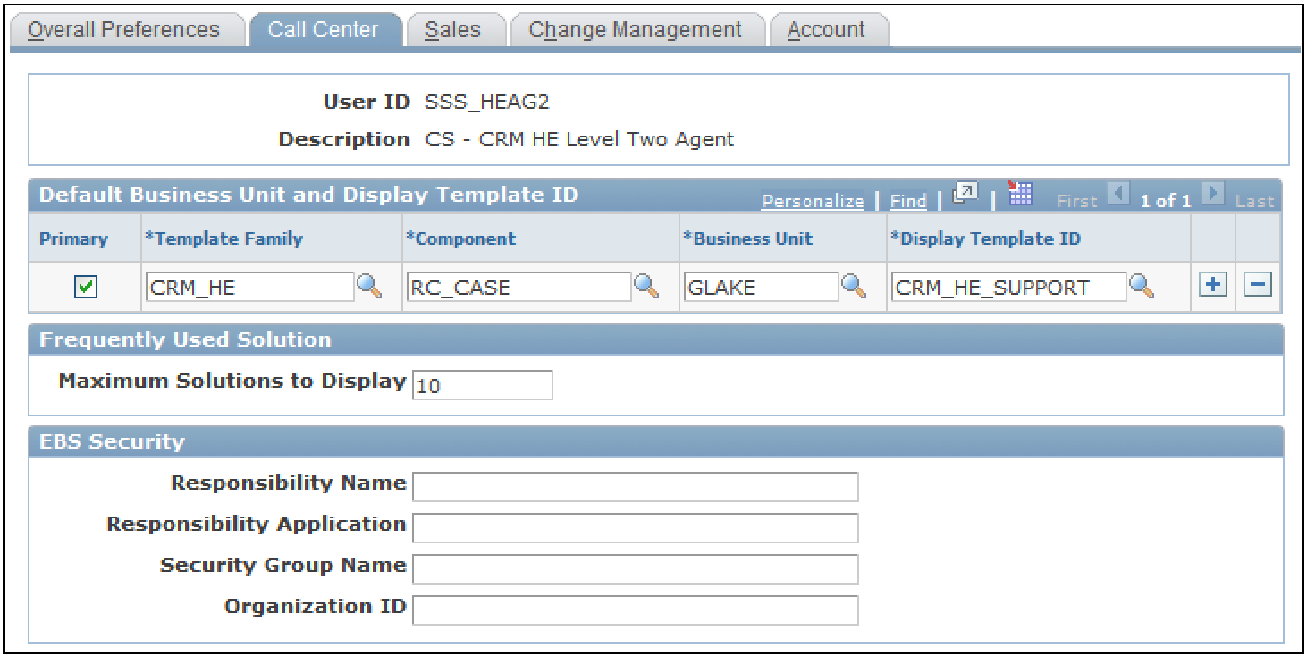
### *See Also*

Chapter 3, "Setting Up General Options," Setting Up Alternate Characters, page 33

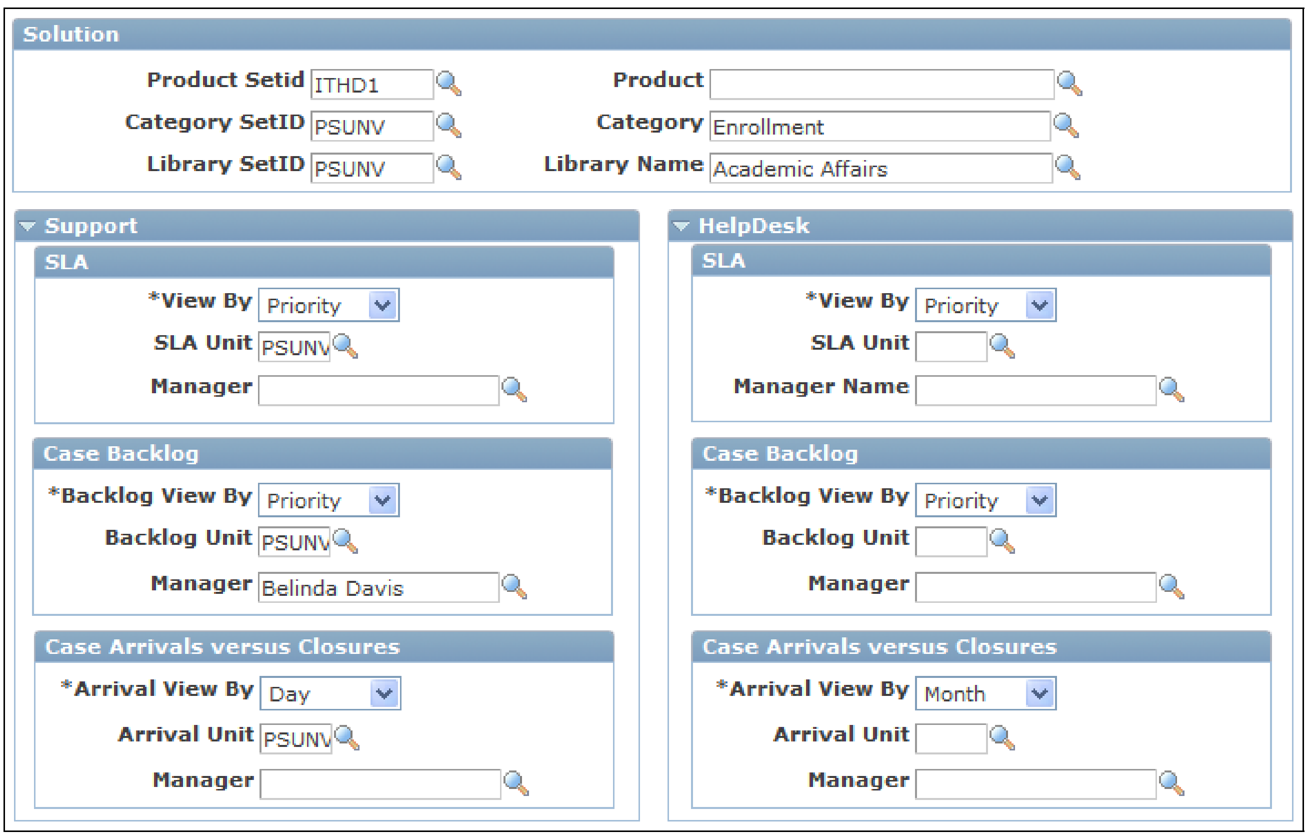
## Defining Call Center Preferences

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

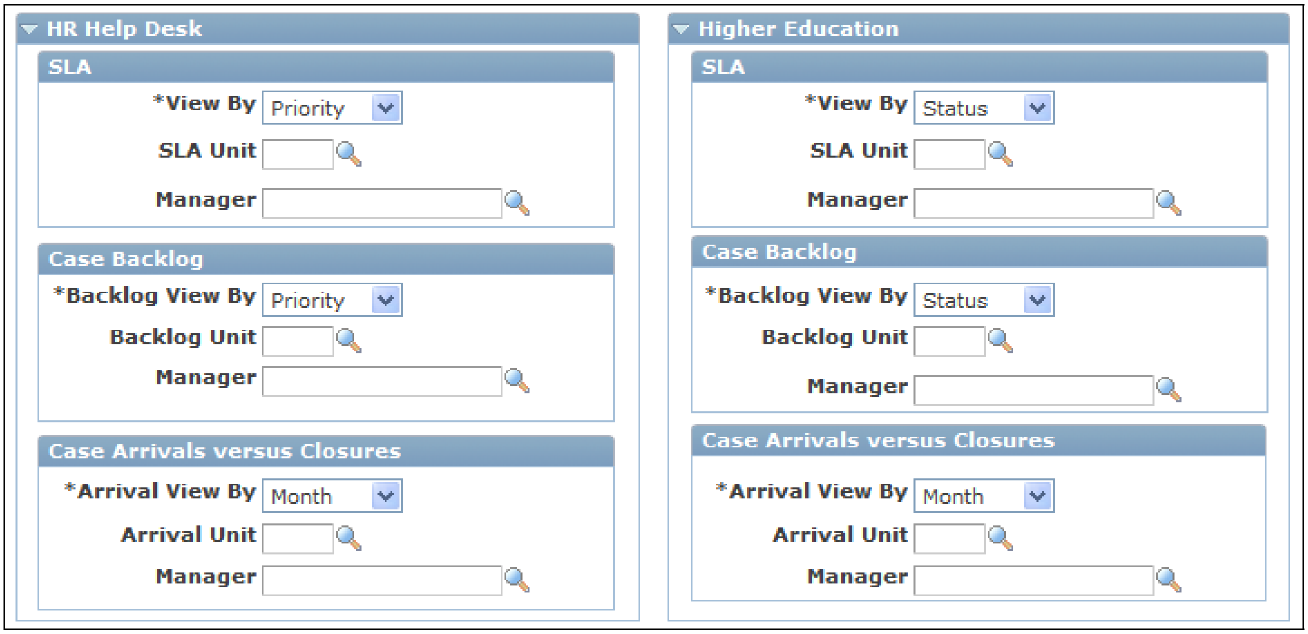
 




Call Center page (1 of 3)




Call Center page (2 of 3)




Call Center page (3 of 3)

### *Default Business Units and Display Template ID*

| | |
|---|---|
| **Primary** | Select this check box if you want the system to use the display template, component, market, and business unit as the user's primary default.<br><br>Selecting a primary business unit provides the system with a default for items that are call-center related. It does not affect functionality that is business-unit driven such as the category/type/detail setup table default or solution searching in self-service. |
| **Template Family** | Select the display template family that you want the system to default to for the user. Once an agent opens a case, however, the agent cannot change the display template family. Depending on how you configure your system, an agent can use different display templates to view information for the same case.<br><br>See  and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Defining Call Center Business Units and Display Template Options," Display Template Families. |
| **Component** | Select the component that you want the system to default to for the user. Components can be associated with multiple display templates, each of which provides a different presentation of a page. |
| **Business Unit** | Select the business unit that you want the system to default to for the user for the display template, component, and market. |
| **Display Template ID** | Select the display template that you want the system to default to for the user. Display templates enable you to control the appearance and behavior of components (pages or sets of pages) for your various business needs. |

#### *Frequently Used Solution*

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

#### *EBS Security*

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

| | |
|---|---|
| **Responsibility Name** | Enter the Responsibility Name to be passed to the Oracle E-Business HCM system as part of the security authorization for this user. |
| **Responsibility Application** | Enter the Responsibility Application to be passed to the Oracle E-Business HCM system as part of the security authorization for this user. |
| **Security Group Name** | Enter the Security Group Name to be passed to the Oracle E-Business HCM system as part of the security authorization for this user. |
| **Organization ID** | Enter the Organization ID to be passed to the Oracle E-Business HCM system as part of the security authorization for this user. |

#### *Solution*

Use this section to enter default values to be populated on the solution dashboard pagelets.

At runtime, these values can be modified through the personalization option on the corresponding pagelet. Runtime changes are updated on this page as well.

| | |
|---|---|
| **Product SetID** and **Product** | Enter the setID and name of the default product to use for populating the Top Solutions by Product pagelet. |
| **Category SetID** and **Category** | Enter the setID and name of the default category to use for populating the Top Solutions by Category pagelet. |
| **Library SetID** and **Library Name** | Enter the setID and name of the default solution library to use for populating the Top Solutions by Library pagelet. |

#### *SLA (Service Level Agreement)*

Use this section to enter default values to be populated on the case SLA dashboard pagelets for the corresponding vertical families, Support, HelpDesk, HR HelpDesk and Higher Education.

At runtime, these values can be modified through the personalization option on the corresponding pagelet. Runtime changes are updated on this page as well.

**View By** Select the default value to appear on the View By field of the SLA pagelets when they are launched initially. Available values are *Priority* and *Status.*

**SLA Unit** Select the business unit by which the case information on the SLA pagelets is filtered and displayed.

**Manager** Select the manager of the provider groups by which the case information on the pagelet is filtered and displayed.

This value is used only for the SLA pagelet that is available in the Manager Dashboard.

### Case Backlog

Use this section to enter default values to be populated on the case backlog dashboard pagelets for the corresponding vertical families, Support, HelpDesk, HR HelpDesk and Higher Education.

At runtime, these values can be modified through the personalization option on the corresponding pagelet. Runtime changes are updated on this page as well.

**Backlog View By** Select the default value to appear on the View By field of the case backlog pagelets when they are launched initially. Available values are *Priority* and *Status.*

**Backlog Unit** Select the business unit by which the case information on the case backlog pagelets is filtered and displayed.

**Manager** Select the manager of the provider groups by which the case information on the pagelet is filtered and displayed.

This value is used only for the case backlog pagelet that is available in the Manager Dashboard.

### Case Arrivals versus Closures

Use this section to enter default values to be populated on the case arrivals versus closures dashboard pagelet for the corresponding vertical families, Support, HelpDesk, HR HelpDesk and Higher Education.

At runtime, these values can be modified through the personalization option on the corresponding pagelet. Runtime changes are updated on this page as well.

**Arrival View By** Select the default value to appear on the View By field of the case arrivals versus closures pagelet when it is launched initially. Available values are *Day,Week* and *Month.*

**Arrival Unit** Select the business unit by which the case information on the case arrivals versus closures pagelet is filtered and displayed.

**Manager**

Select the manager of the provider groups by which the case information on the pagelet is filtered and displayed.

This value is used only for the case arrivals versus closures pagelet, which is only available in the Manager Dashboard.

### *See Also*

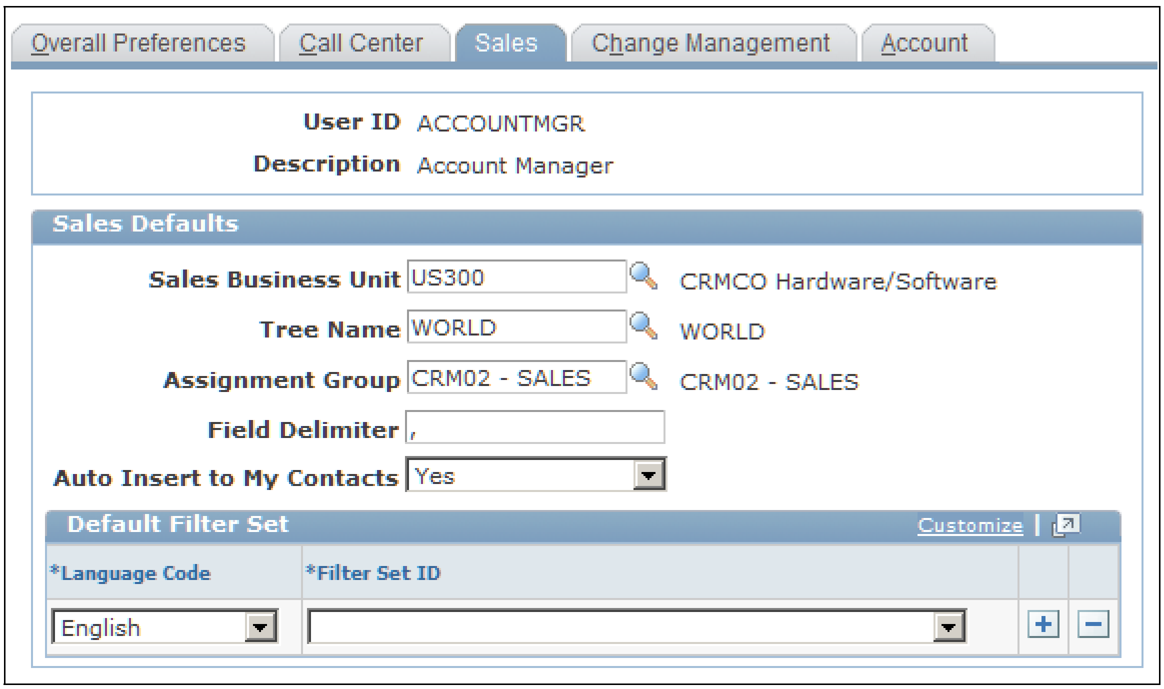
*PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Defining Call Center Business Units and Display Template Options"

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

Working with Services Operational Dashboards, Understanding Services Operational Dashboards

## Defining Sales Preferences

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




Sales Preferences page

### *Sales Defaults*

**Sales Business Unit**

Select the assigned business unit.

**Tree Name**

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

**Assignment Group**

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

**Note.** Assignment group is part of territory assignment criteria.

**Field Delimiter**

Choose to use delimiters other than the comma, such as the semicolon. This is used for lead import.

**Auto Insert to My Contacts**

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

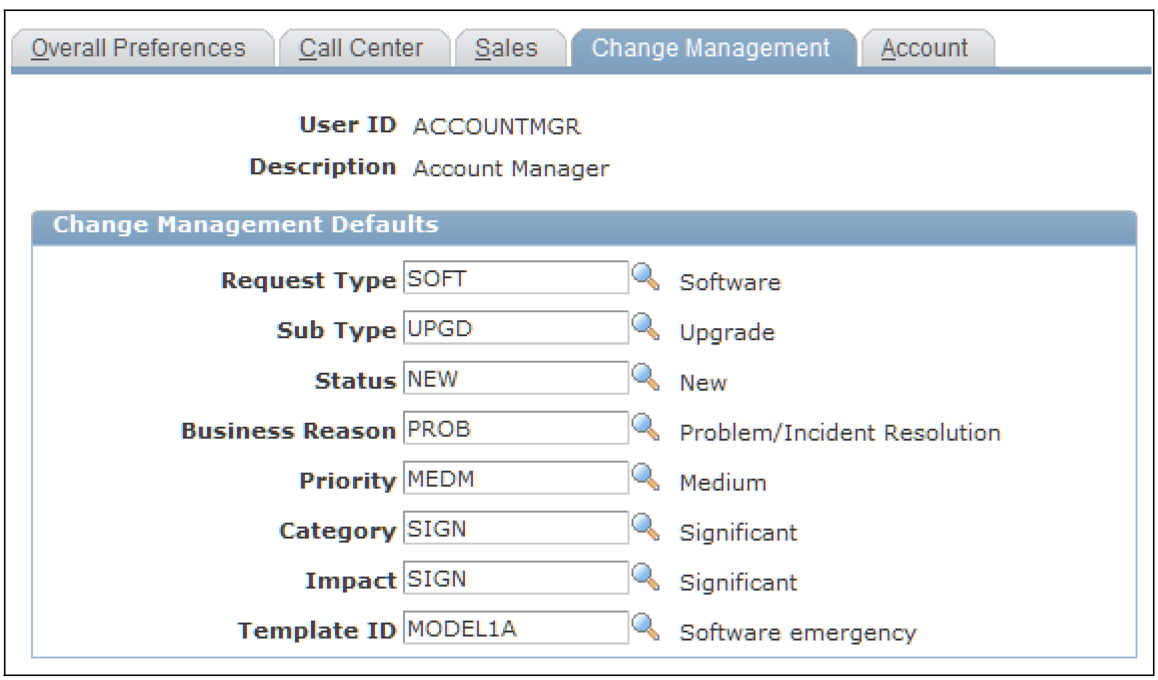
### *See Also*

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

Chapter 22, "Working with Contacts," page 409

## Defining Change Management Preferences

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




Change Management page

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

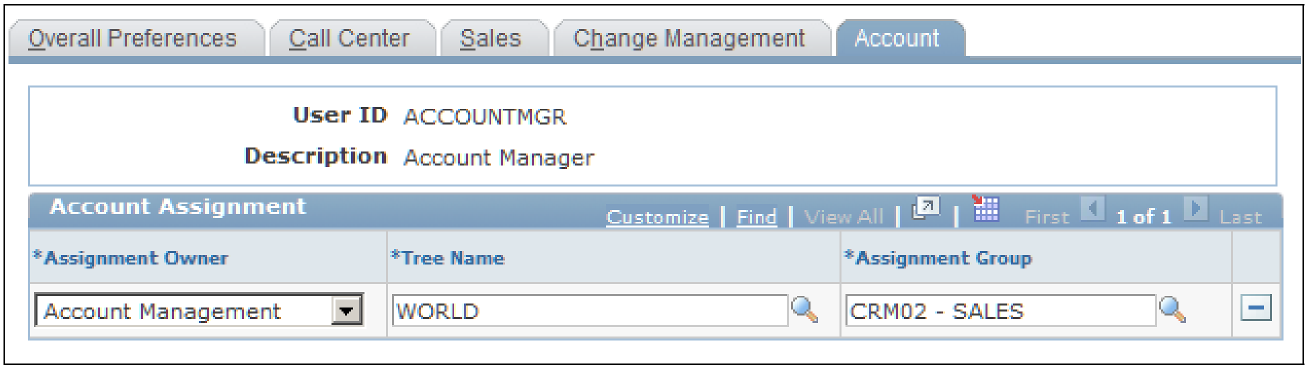
 

### See Also

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

## Defining Account Preferences

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




Account page

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

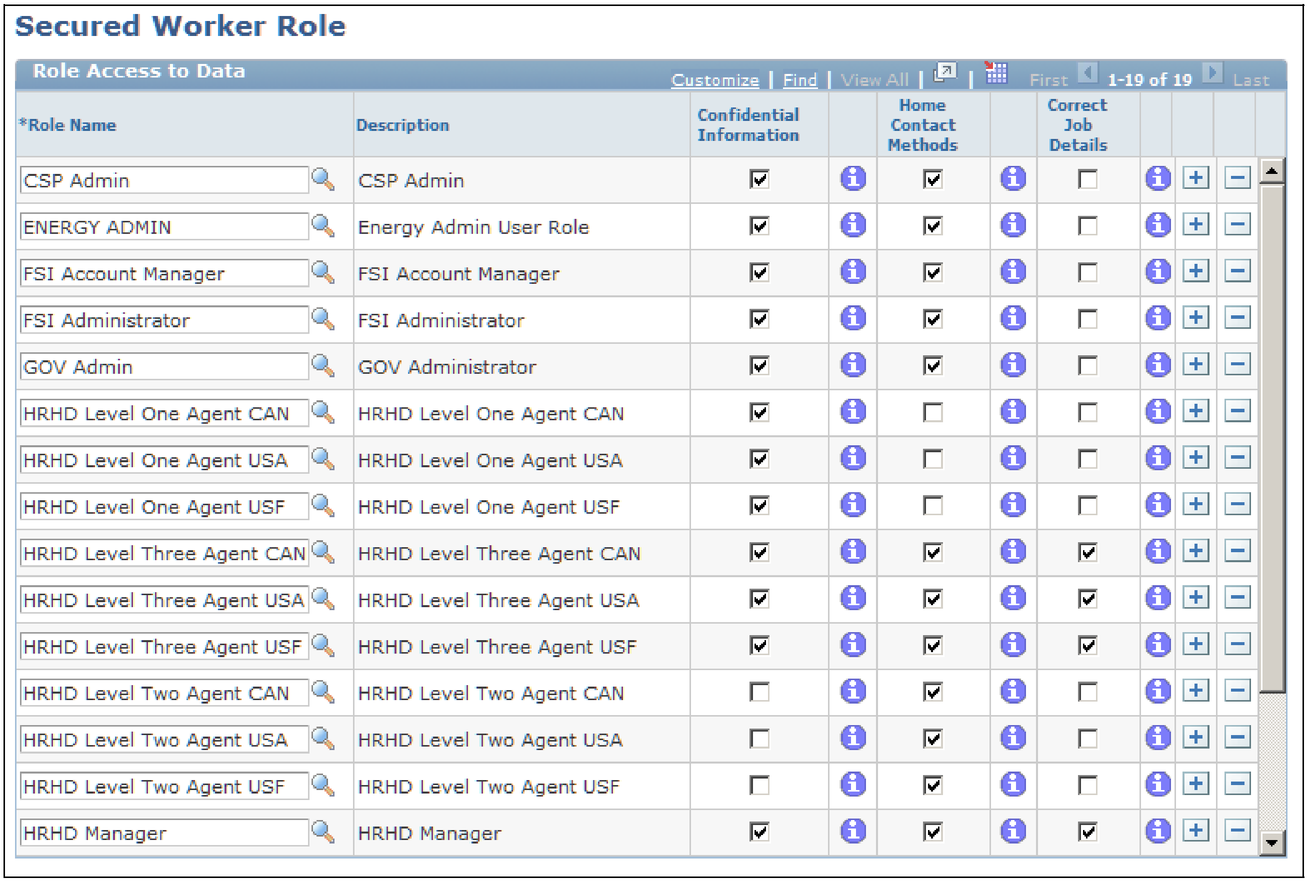
### See Also

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

## Defining Roles with Access to Sensitive Worker Information

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



Secured Worker Role

Role Access to Data

Customize | Find | View All | First 1-19 of 19 Last

| *Role Name | Description | Confidential Information | Home Contact Methods | Correct Job Details |
| --- | --- | --- | --- | --- |
| CSP Admin | CSP Admin | ☑ | ☑ | ☐ |
| ENERGY ADMIN | Energy Admin User Role | ☑ | ☑ | ☐ |
| FSI Account Manager | FSI Account Manager | ☑ | ☑ | ☐ |
| FSI Administrator | FSI Administrator | ☑ | ☑ | ☐ |
| GOV Admin | GOV Administrator | ☑ | ☑ | ☐ |
| HRHD Level One Agent CAN | HRHD Level One Agent CAN | ☑ | ☐ | ☐ |
| HRHD Level One Agent USA | HRHD Level One Agent USA | ☑ | ☐ | ☐ |
| HRHD Level One Agent USF | HRHD Level One Agent USF | ☑ | ☐ | ☐ |
| HRHD Level Three Agent CAN | HRHD Level Three Agent CAN | ☑ | ☑ | ☑ |
| HRHD Level Three Agent USA | HRHD Level Three Agent USA | ☑ | ☑ | ☑ |
| HRHD Level Three Agent USF | HRHD Level Three Agent USF | ☑ | ☑ | ☑ |
| HRHD Level Two Agent CAN | HRHD Level Two Agent CAN | ☐ | ☑ | ☐ |
| HRHD Level Two Agent USA | HRHD Level Two Agent USA | ☐ | ☑ | ☐ |
| HRHD Level Two Agent USF | HRHD Level Two Agent USF | ☐ | ☑ | ☐ |
| HRHD Manager | HRHD Manager | ☑ | ☑ | ☑ |

Secured Worker Role page

---

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

---

### *Role Access to Data*

**Role Name**

Select the role that needs access to sensitive and semisensitive data. The roles that are defined in the example are from sample data that PeopleSoft delivers with the application. If you want to create your own roles and use them here, you must first define them in the Roles component. Select PeopleTools, Security, Permissions & Roles, Roles.

**Confidential Information**

Select this check box to enable the role to have access to these worker fields: Gender, DOB (date of birth), Age, National ID, and Employee Status.

**Home Contact Methods**

Select this check box to enable the selected role to have access to these worker fields: Home Address, Home Phone, Home Email, and Home Pager.

| | |
|---|---|
| **Correct Job Details** | Select this check box to allow the selected role to view and change all existing rows and to add new rows with no effective date restrictions. Otherwise, the selected role can change only future rows and enter new rows with an effective date greater than the current row. |

### *See Also*

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

# Implementing Self-Service Security

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

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

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

## Understanding Privileges Codes

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

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

| *Privilege Code* | *Description* | *Usage* | *Is Amount Associated?* |
|---|---|---|---|
| VIEWALLQUOTS | View all quotes. | Enable users to view all quotes that were placed by others with an amount that is less than the amount specified. (The rows are available or unavailable.) | You can use the operator code for less than (<) or less than or equal to (<=) to include a dollar amount. |

## Understanding Custom Privilege Codes

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

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

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

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

Local number &output_msg_set_nbr, &output_msg_nbr;

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

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

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

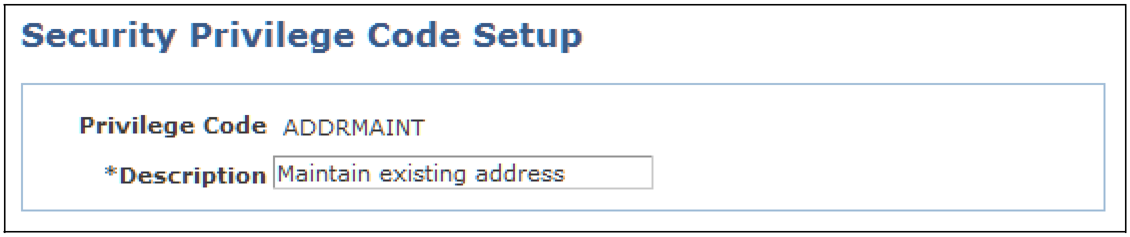
## Pages Used to Implement Self-Service Security

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Security Privilege Code Setup | RB_SRTY_PRIV | Set Up CRM, Security, Self-Service, Privilege Codes, Security Privilege Code Setup | Define the privileges that are associated with the privilege codes. |
| Assign User Privileges | RB_SRTY_PRIV_DELTA | Set Up CRM, Security, Self-Service, User Privileges, Assign User Privileges | Assign user privileges. |
| Assign Role Privileges | RB_SRTY_PRIV_DFLT | Set Up CRM, Security, Self-Service, Role Privileges, Assign Role Privileges | Assign privileges to roles. |
| Existing Customer User Registration Setup | RX_CUST_REG_TABLE | Set Up CRM, Security, Self-Service, Existing Customer Registration, Existing Customer User Registration Setup | Create templates of records and fields to be used on the User Registration Setup page. |
| Business User Registration Setup | RX_REP_REG_TABLE | Set Up CRM, Security, Self-Service, Business User Registration, Business User Registration Setup | Register business users. |
| User Registration Setup | RX_GUEST_TEMPLATE | Set Up CRM, Security, Self-Service, User Registration, User Registration Setup | Register guest users. |
| Self Service Registration | RX_REGTXT_SETUP | Set Up CRM, Security, Self-Service, Terms and Conditions, Self Service Registration | Set up terms and condition statements for users completing self-service registration. |
| Terms of Service | RX_TERMS_SETUP | Set Up CRM, Security, Self-Service, Terms and Conditions, Terms of Service | Set up terms of service statements for users completing self-service registration. |
| Privacy Policy | RX_PRVACY_SETUP | Set Up CRM, Security, Self-Service, Terms and Conditions, Privacy Policy | Set up privacy policy statements for users completing self-service registration. |

## Establishing Privilege Codes and Custom Privilege Codes

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

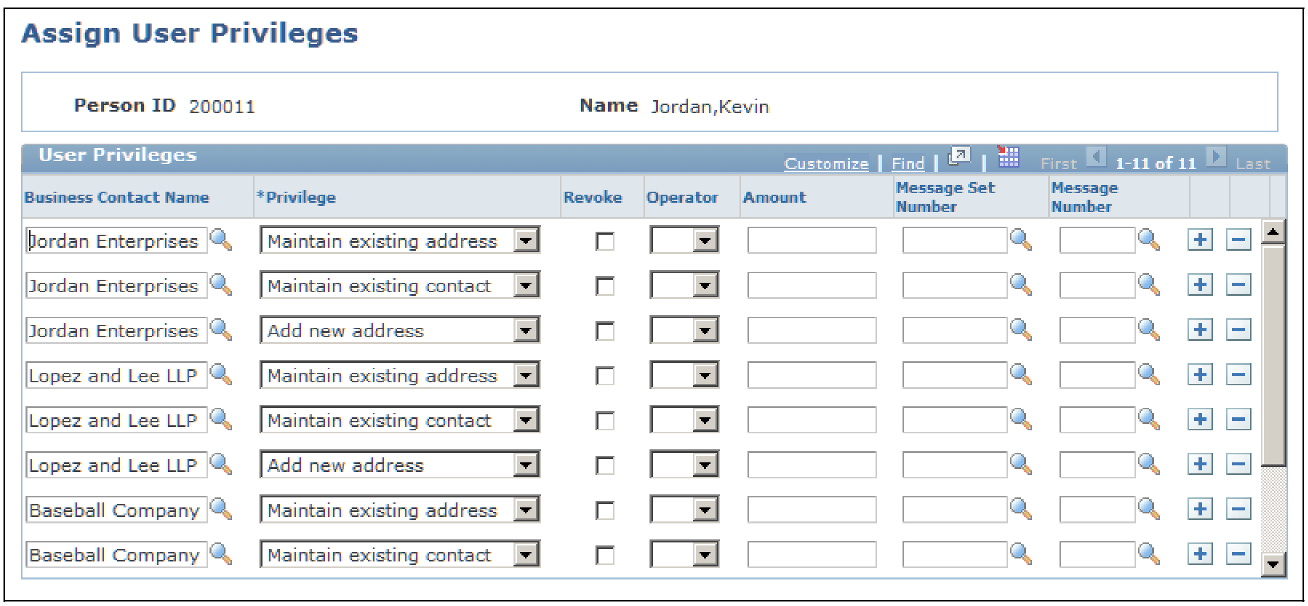



Security Privilege Code Setup page

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

## Assigning Privileges to Users

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




Assign User Privileges page

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

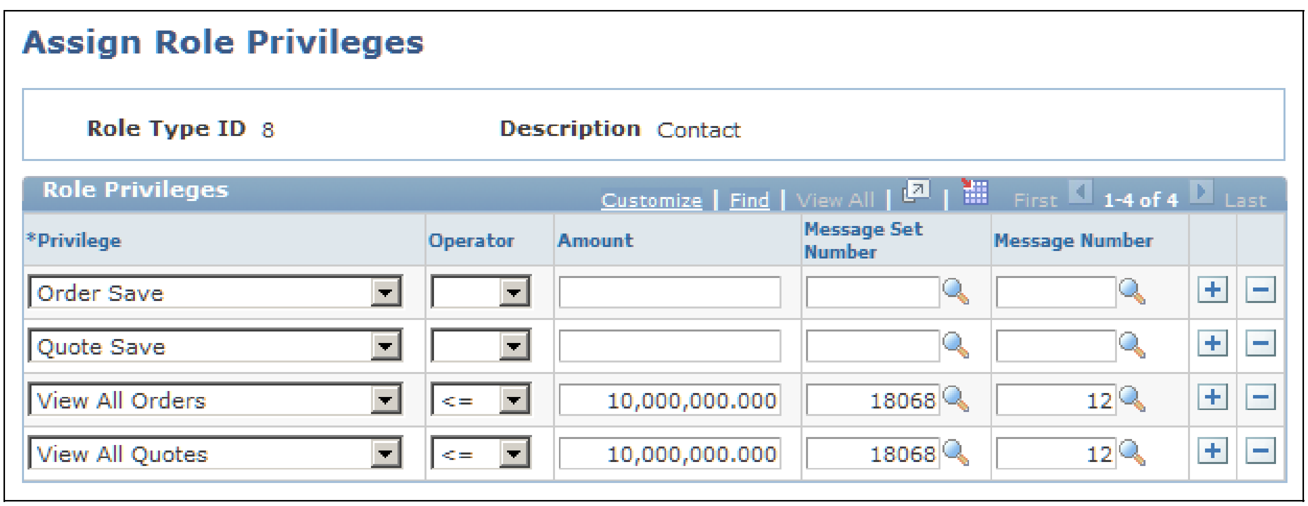
For example, suppose that a contact's role privileges do not enable the contact to update customer address information. If you need to enable a particular contact to update addresses, you could do that by assigning the user privilege to that contact. Conversely, suppose that a contact's role can submit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

| | |
|---|---|
| **Business Contact Name** and **Privilege** | Select the business contact's name and the privilege code. |
| **Revoke** | Select to revoke a privilege. |
| **Operator** and **Amount** | For transactions that are dependent on an amount, you can define privileges that are associated with particular amounts. If the system authenticates the user for the amount, it displays the appropriate information. For the Amount field, only numeric values are relevant; the system does not take the currency into account. |
| **Message Set Number** and **Message Number** | Associate a default message in case of authorization failure. If authorization fails, the transaction that failed can display the default message or its own message. |

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

## Assigning Privileges to Roles

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




Assign Role Privileges page

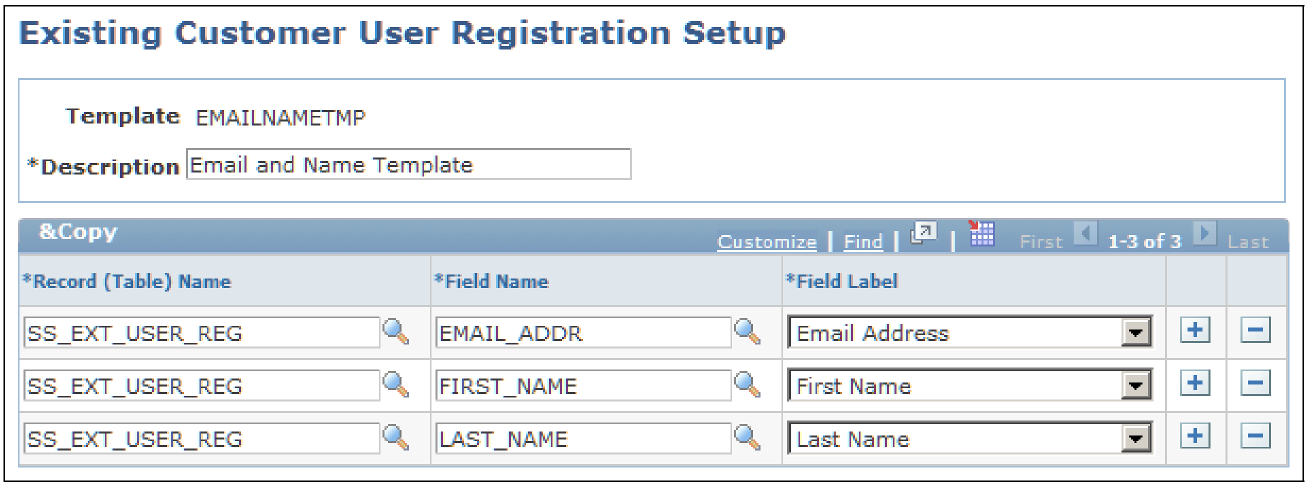
Only two business object roles (as defined in the Customer Data Model) are supported with PeopleSoft CRM self-service. These are consumer and contact. View the sample data for the role privileges and follow the sample as a guideline. If you have transactions for which data filtration is based on an amount,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

| | |
|---|---|
| **Amount** | Use this field if you have transactions for which data filtration is based on an amount. |
| **Message Set Number** and **Message Number** | Associate a default message in case of authorization failure. If authorization fails, the transaction that failed can display the default message or its own message. |

## Setting Up Existing Customer User Registration Templates

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




Existing Customer User Registration Setup page

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

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

---

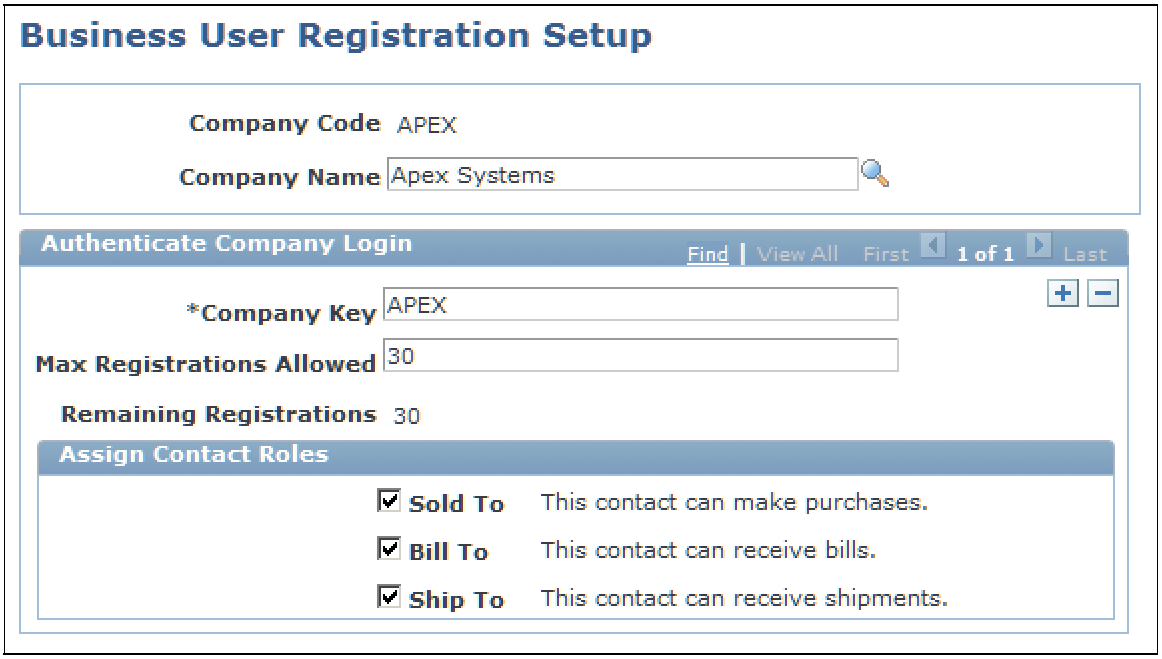
**Note.** For security reasons, set up at least two keys that are known only to the user.

---

## Registering Business Users

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




Business User Registration Setup page

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

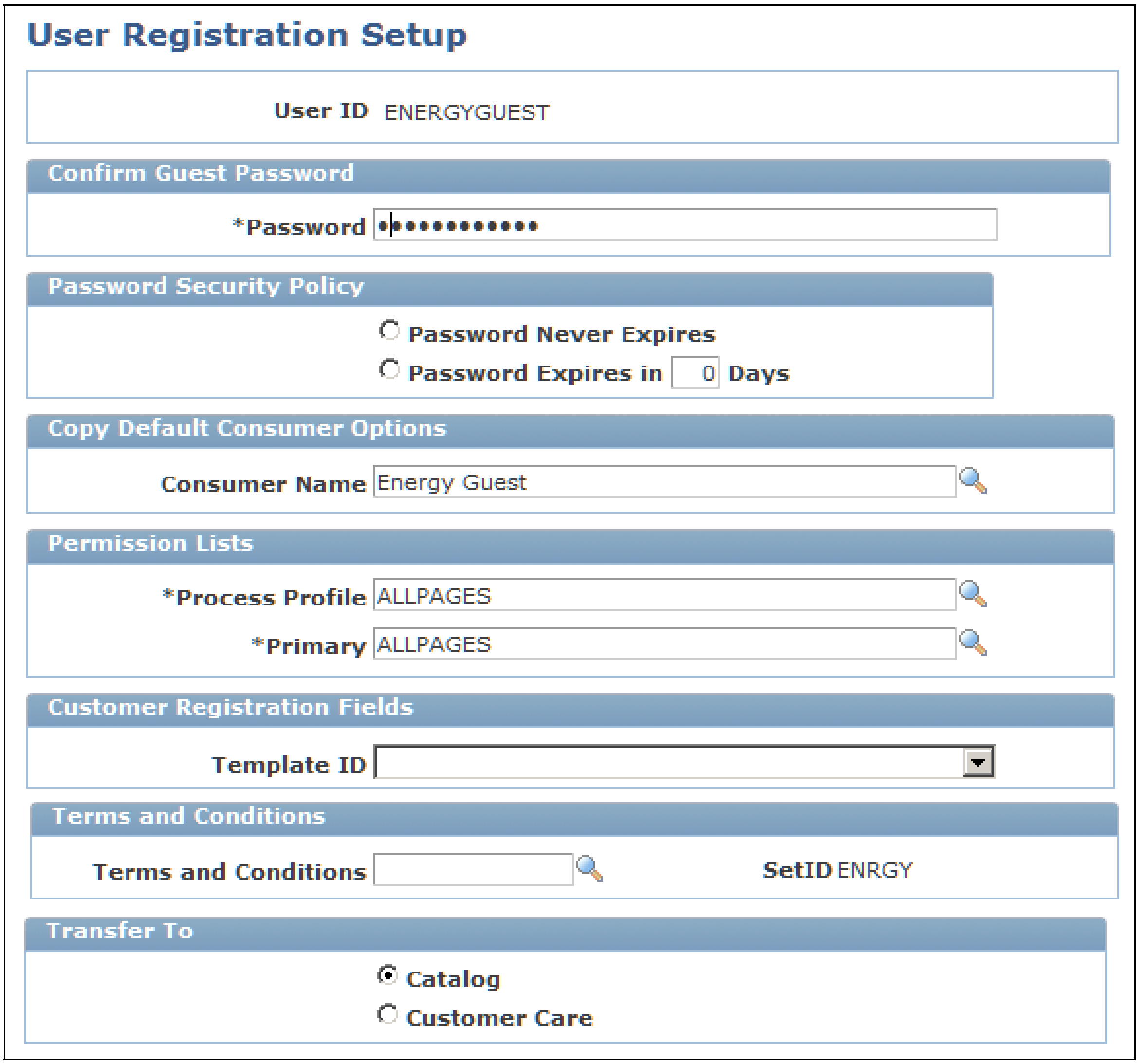
The company name is the company for whom you are setting up the registration keys. When a self service user or external company administrator uses the company key to register, the user that is created by the system is tied to the company defined on this page.

| | |
|---|---|
| **Company Key** | Enter a value that you provide to a company administrator so that their users can self-register and gain access to the site. The company code and key are used to authenticate users who attempt to register at the self-service site. |
| **Max Registrations Allowed** (maximum registrations allowed) | Enter the number of users that are permitted to register with this specific company code. |
| **Assign contact Roles** | Select *Sold To*, *Bill To*, or *Ship To* to establish the capacity of the business users that represents the company. |

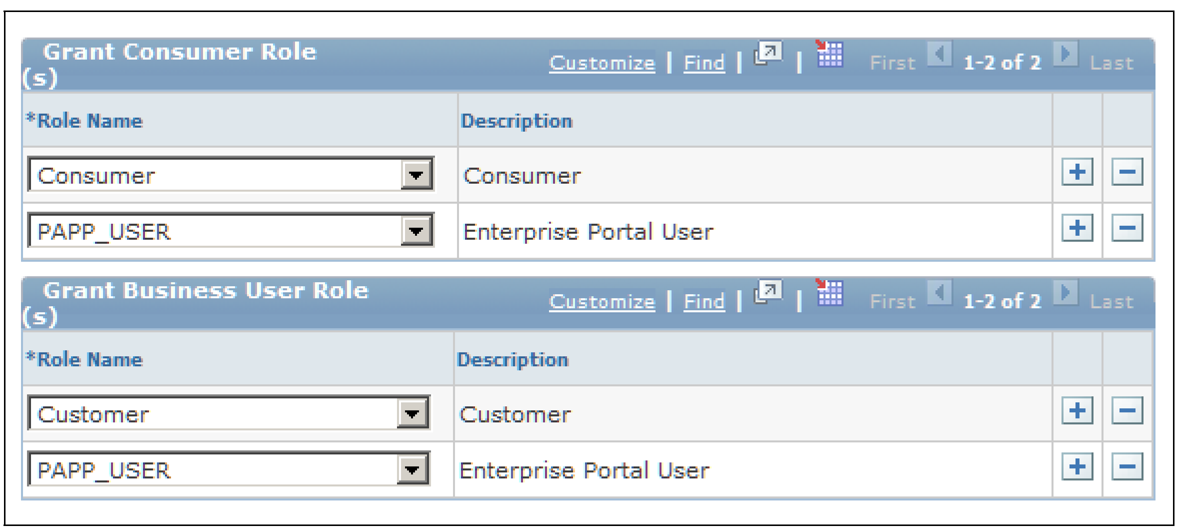
## Setting Up Guest Users

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




User Registration Setup page (1 of 2)




User Registration Setup page (2 of 2)

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

See  and Chapter 20, "Setting Up Customer Self-Service," Setting Up Guest IDs to Access Self-Service Sites, page 361.

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

| | |
|---|---|
| **User ID** | Displays the guest user ID, which is used to make the self-service site available to anonymous users. You can add several guest users. Associate each guest user with a different business unit that is defined on the User Preferences page. By defining several guest users, you can provide access to different self-service sites that support different segments of the business.<br><br>For example, suppose that the user ID *GUEST* is associated with business unit US001, which sells sporting good products. The user ID *GUESTCOMM* is associated with business unit COM01, which sells telecommunications products. When you implement these sites, you can define both guest users, and users can access either site depending on the guest user ID that they supply.<br><br>Similarly, you can make the language of a site dependent on the guest user ID. |
| **Password** | Enter the exact password that authenticates the guest user. The user ID and password in combination are either appended to the URL string that provides direct access to the site or is placed in the config.properties file in PeopleTools installation.<br><br>Refer to the installation instructions for more information about installing direct access to your website. |
| **Password Never Expires** and **Password Expires in Days** | Select one of these values to indicate when the password expires. If you select *Password Expires in Days,* enter the number of days. |
| **Consumer Name** | Select the template that you want to use for the consumer name. Guest users visiting the self-service site might create their own accounts but only provide minimal information, such as user ID, password, name, email, phone, and address information. The guest user does not enter other required information, such as currency, payment method, and carrier information, which appears by default from the template consumer. |
| **Process Profile** and **Primary** | Assign an appropriate permission list that has access to run batch processes. This permission list is copied to the new user that is created through self-service. |
| **Template** | Select the template that contains the fields and records that you want to use for guests using self-service registration. |
| **Terms and Conditions** | Select the template that contains the terms and conditions, terms of service, and privacy statements that you want to use for guests using self-service registration. |

| | |
|---|---|
| **Catalog** and **Customer Care** | Select the item to which you want to direct self-service users. |
| **Role Name** | Grant roles for consumer and business users by selecting role names from the lists in the Grant Consumer Role(s) and Grant Business User Role(s) grids. You can add as many roles as you want. When a consumer is created, the consumer roles that you specify are assigned to the new consumer user; and when a business user is created, the business user roles that you specify are assigned to the new business user.<br>To enable guest users to create their own user IDs, you must define the roles that a guest user can grant to create self-service users.<br>For example, in the delivered sample data, the GUEST role and the PeopleTools role UPG_ALLPAGES can grant the consumer role. When the VP1 user signs in to set up the guest user registration, that user can select the consumer role. When the guest user or an anonymous user registers as a consumer, the system assigns the new user to the consumer role. |

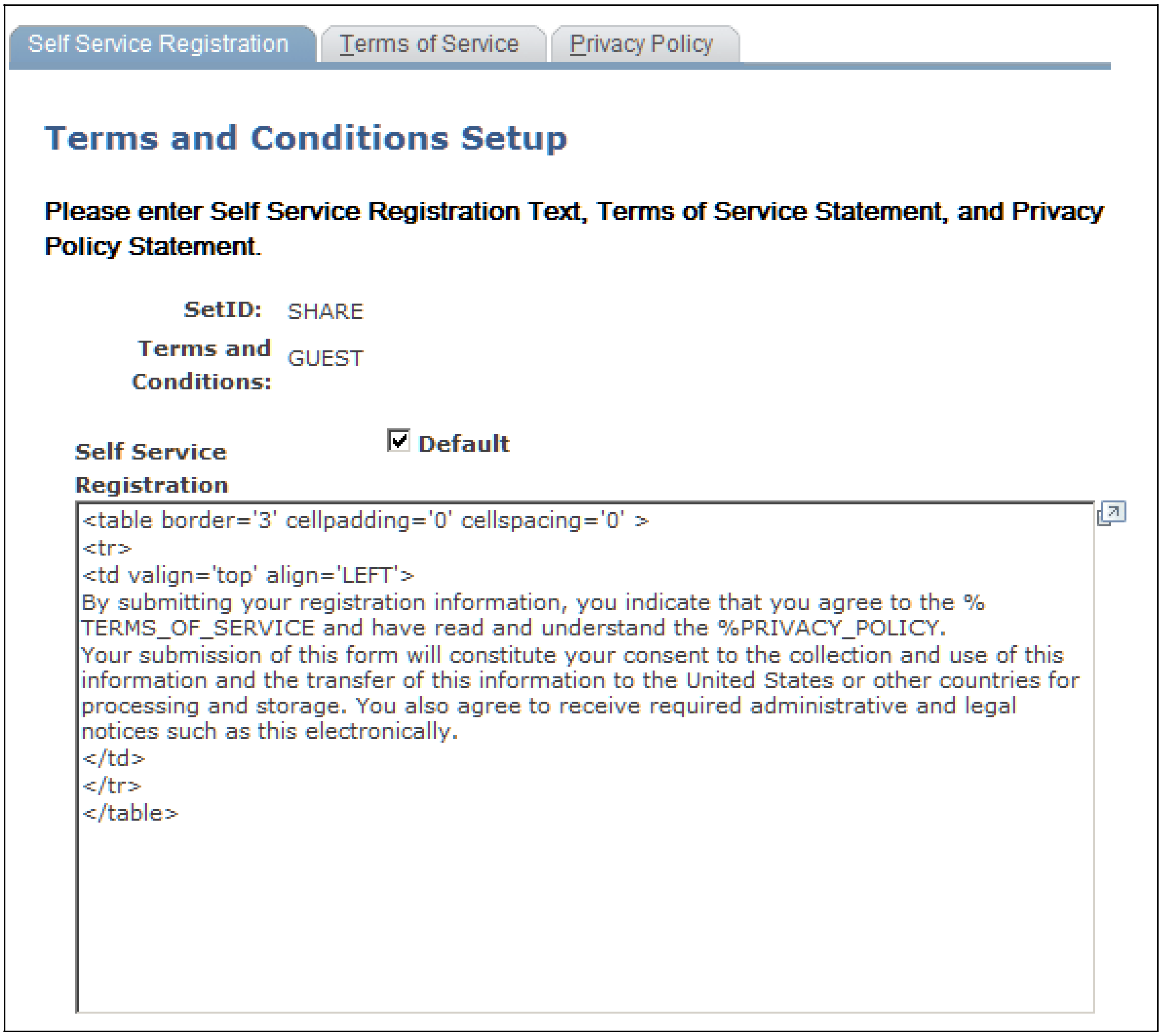
### *See Also*

Chapter 20, "Setting Up Customer Self-Service," page 357

## Setting up Terms and Conditions for Self-Service Users

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



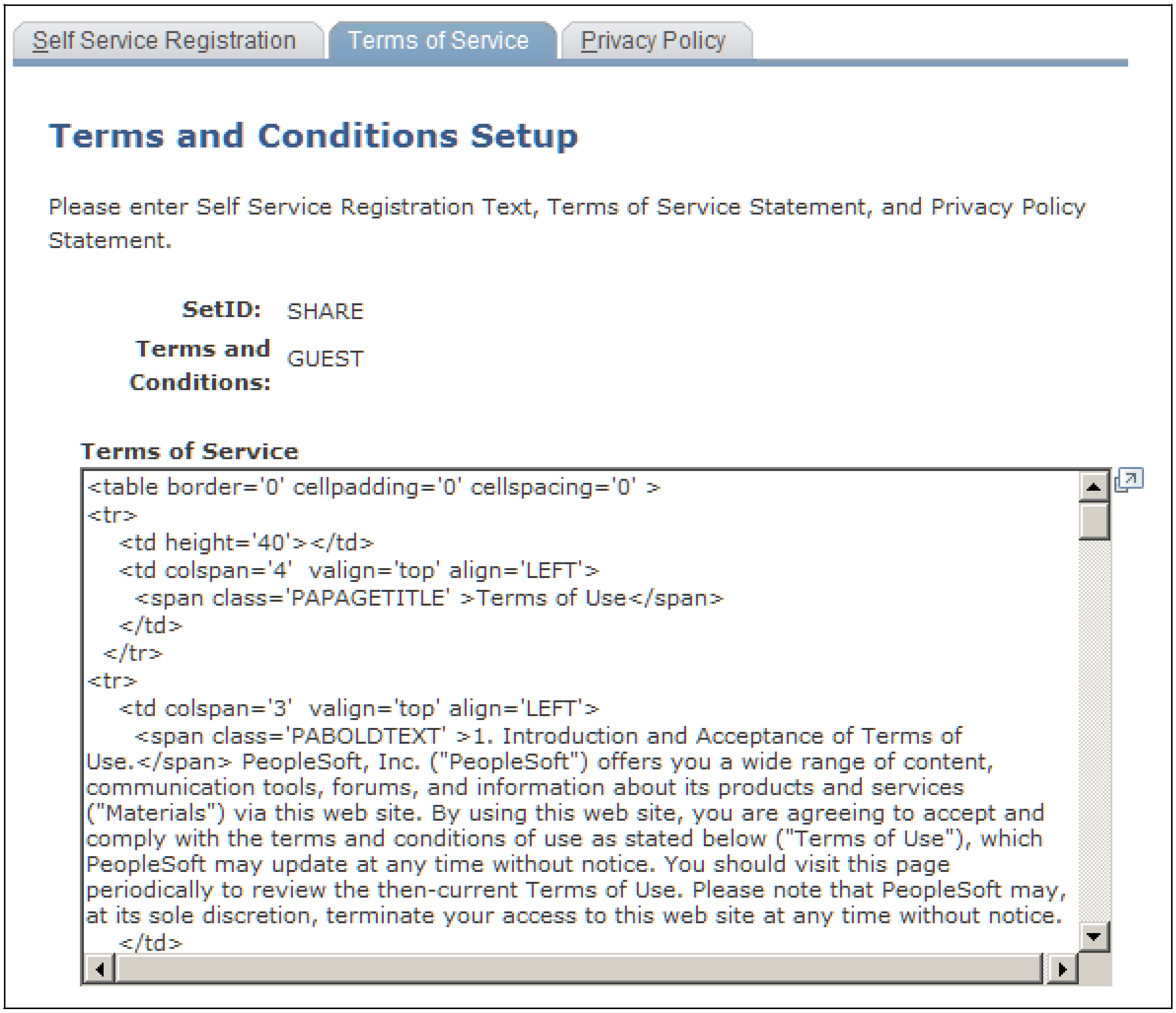

Terms and Conditions - Self Service Registration page

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

## Setting up Terms of Service for Self-Service Users

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



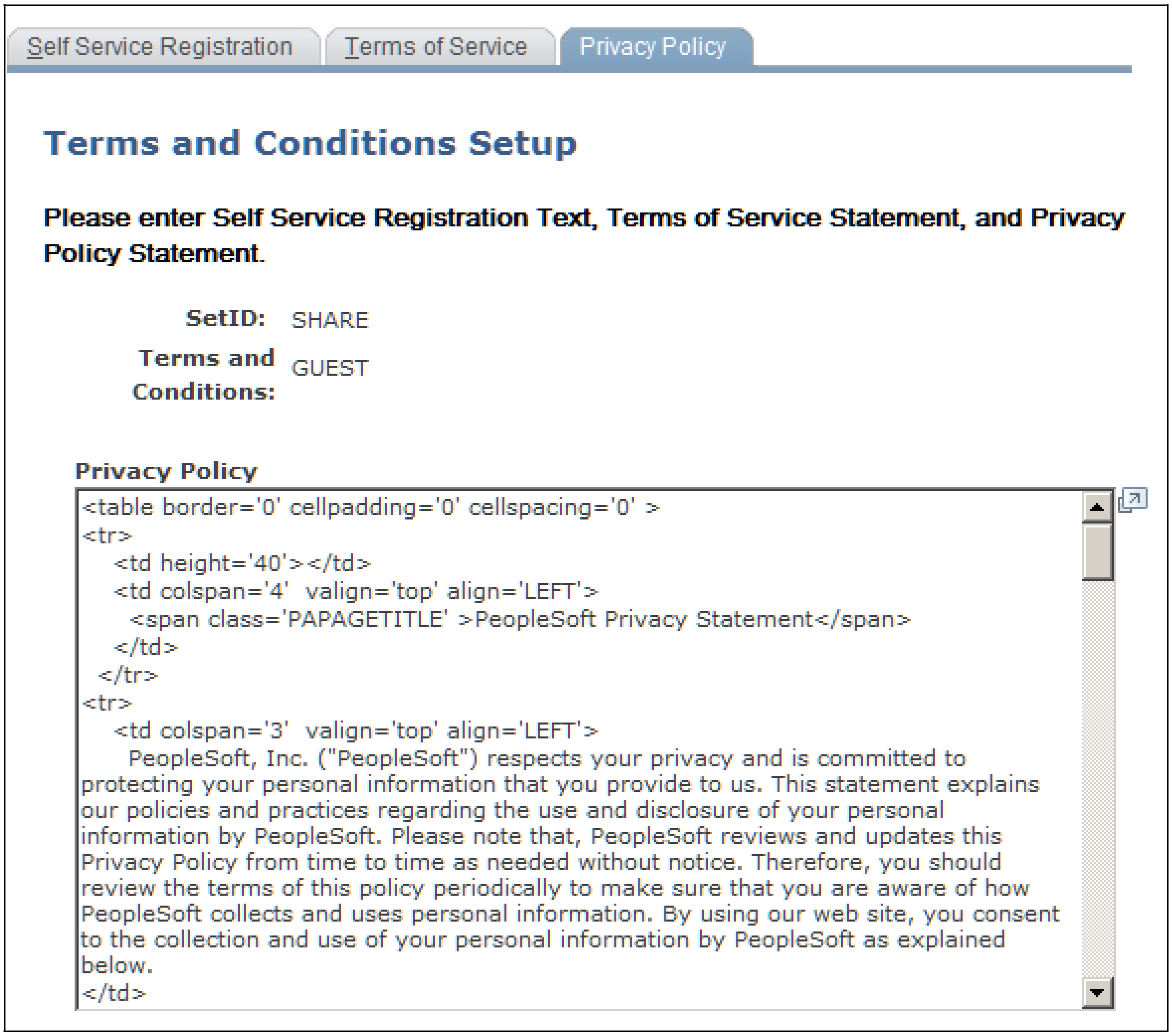

Terms and Conditions - Terms of Service page

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

## Setting up Privacy Policies for Self-Service Users

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




Terms and Conditions - Privacy Policy page

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

## Defining Application Security

To define application security, use these components:

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

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

This section discusses how to:

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

## Pages Used to Define Application Security

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

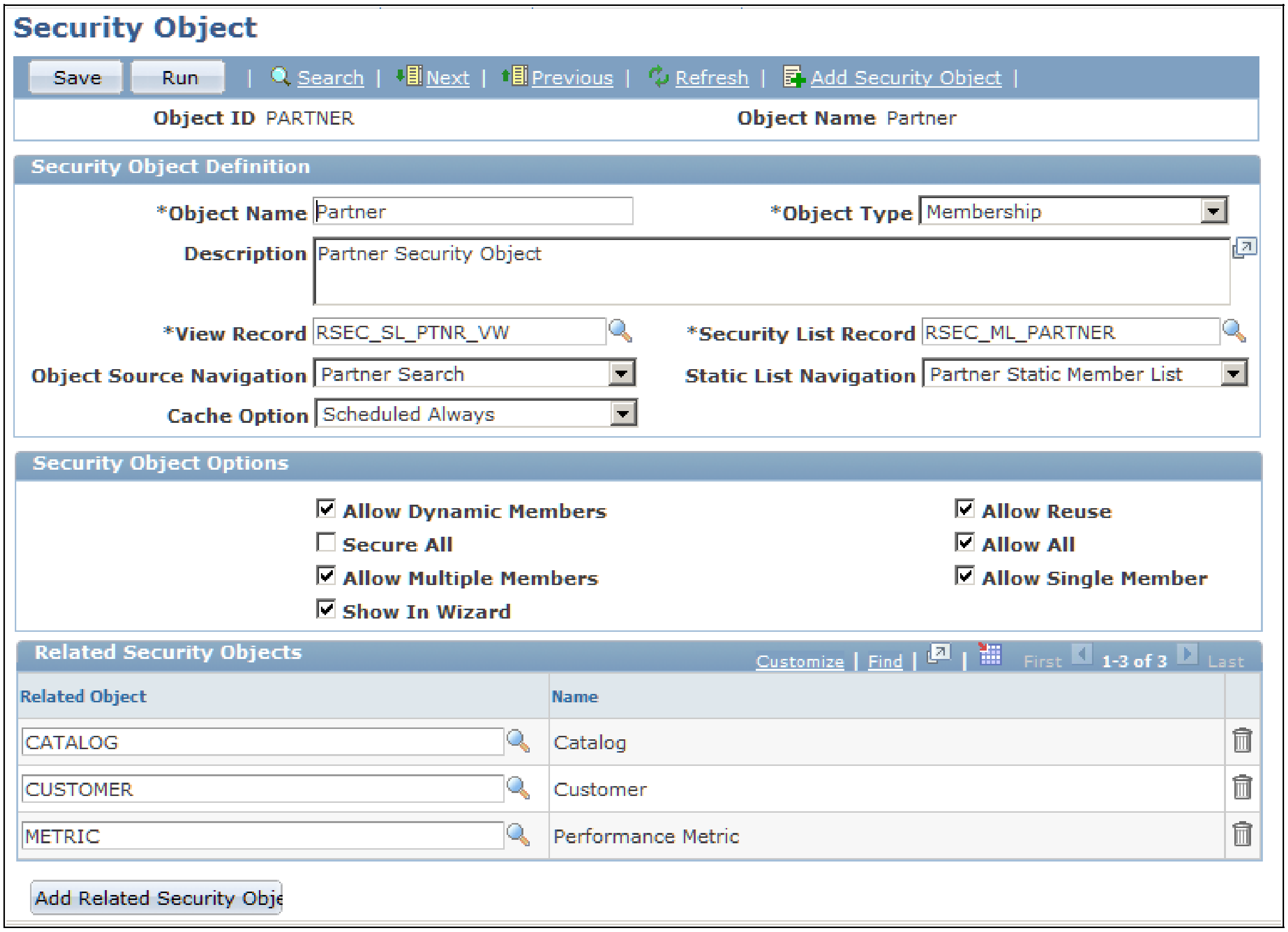
| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Add Membership List | RSEC_SRTY_WIZ1 | Click Next at the bottom of the first Add Membership List page. | Select the membership object and the members to which you want the security object to apply. |
| Add Membership List | RSEC_SRTY_WIZ2 | Click Next at the bottom of the second Add Membership List page. | Select the membership type. |
| Add Membership List (static) | RSEC_ML_PARTNER<br>RSEC_ML_CUSTOMER<br>RSEC_ML_PART_C<br>RSEC_ML_PERSON<br>RSEC_ML_ROLE | Select Static and then click Next at the bottom of the third Add Membership List page. | Select the partners, partner contacts, customers, people, or roles that you want to add to the membership list. |
| Add Membership List (dynamic) | RSEC_PARTNER_SRCH<br>RSEC_CUSTOMER_SRCH,<br>RSEC_PART_CON_SRCH<br>RSEC_PRSN_SRCH | Select Dynamic and then click Next at the bottom of the third Add Membership List page. | Choose the dynamic criteria that you want to use to select either customers, partners, partner contacts, or persons. |
| Add View List | RSEC_VIEW_SMRY | Set Up CRM, Security, CRM Application Security, Add View List, Add View List | Enter the view list name and description. |
| Add View List | RSEC_SRTY_WIZ1 | Click the Next button from the first Add View List page. | Select the security object and the members to which you want the security object to apply. |
| Add View List | RSEC_SRTY_WIZ2 | Click Next from the second Add View List page. | Select the view type. |
| Add View List (static) | RSEC_VL_CATALOG<br>RSEC_VL_CUSTOMER<br>RSEC_VL_HOLD<br>RSEC_VL_RA_METRICS | • For catalog, hold codes, and metrics, click Next from the second Add View List page.<br>• For customers, click Next from the third Add View List page. | View the criteria that you chose to select customers. |
| Add View List (dynamic) | RSEC_CUSTOMER_SRCH | Click Next at the bottom of the third Add View List page. | Choose the dynamic criteria that you want to use to select customers. |
| Functional Option | RSEC_FUNC_DEFN | Set Up CRM, Security, CRM Application Security, Functional Option, Functional Option | Define functional options, including enabling amount-related fields, conditional operators, application classes, and messages. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Functional Option Group | RSEC_FUNC_GROUP | Set Up CRM, Security, CRM Application Security, Functional Option Group, Functional Option Group | Group functional options. |
| Security Profile | RSEC_PROFILE | Set Up CRM, Security, CRM Application Security, Add Security Profile, Security Profile | Define a security profile. |
| Security Profile - Membership | RSEC_PROFILEMEMBER | Set Up CRM, Security, CRM Application Security, Add Security Profile, Membership | Add membership lists to the security profile. |
| Refresh Dynamic Lists | RSEC_BUILDER_RUN | • Set Up CRM, Security, CRM Application Security, Refresh Dynamic Lists, Refresh Dynamic Lists<br>• Click Run from the Security Profile page. | Set run controls for the List Build process. |
| Static Menu Transfer Path | RSEC_STAT_MENU | Set Up CRM, Security, CRM Application Security, Static Menu Transfer Path, Static Menu Transfer Path | Enter static menu transfer paths. |

## Defining Security Objects

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




Security Object page

**Object Type**

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

**View Record**

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

**Security List Record**

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

| | |
|---|---|
| **Object Source Navigation** | Select the object source to which you want the system to navigate while creating dynamic membership or view lists. Selecting the object source that corresponds to the security object that you are creating provides for the proper transfer of the object source during the creation of dynamic membership or view lists. Data searches that are enabled for application security are only available as part of the selection. It is important to choose the correct search definition for the security object. |
| **Static List Navigation** | Select the static list that you want the system to navigate to during the creation of the security profile.<br><br>This is the navigation that is used for entering static list data or viewing static list data that is either dynamically created or manually entered. You set up static list navigations on the Static Menu transfer page. The system builds the Static List page with the static list record as a level 1 grid. |
| **Cache Option** | Select the cache option that you want the system to use for the security object. The caching option is mainly used for partner and customer security. Basically, when a customer or a partner is added or updated in the Customer Data Model (CDM), it tells the system how often to cache the list members in the list tables and run the Application Engine job that creates the dynamic queries. |

**Security Object Options**

Select one or multiple security object options values:

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

  ---

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

  ---

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

  ---

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

  ---

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

  ---

- *Allow All:* Select this check box if you want the system to display the All field when you are adding view or membership lists to the security profile.
- *Allow Multiple Members:* Select this check box if you want the system to display the Multiple Listas an available option when you are creating a view or membership lists.
- *Allow Single Member:* Select this check box if you want the system to display the Single Member as an available option when you are creating a view or membership list.

- *Show In Wizard:* Select this check box if you want the system to display the security object as a selectable option in the drop-down list box when you are creating membership or view lists.

**Related Security Objects**

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

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

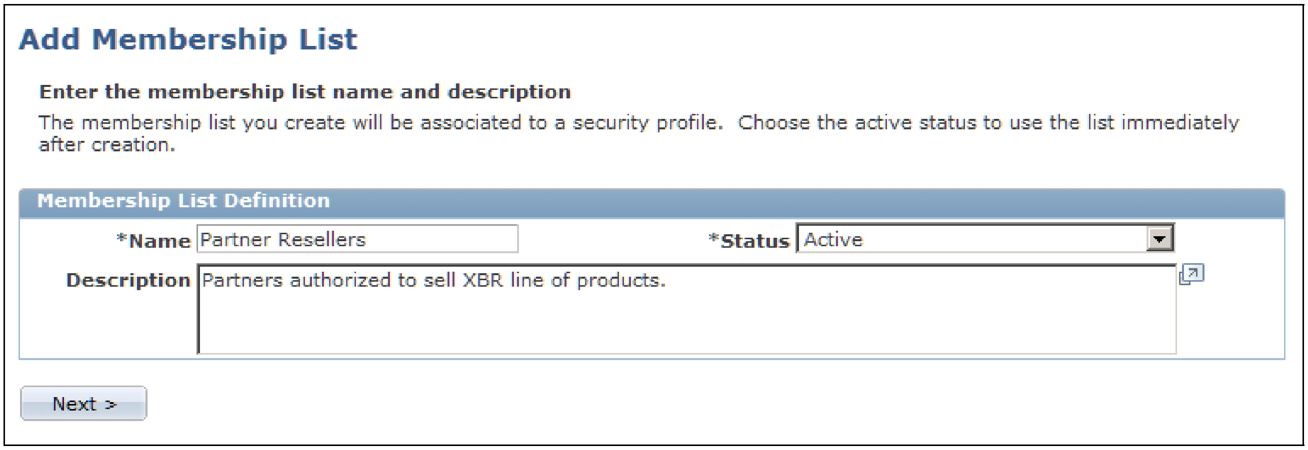
When adding values to the Related Security Objects field, the supported combinations are:

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

## Adding Membership List Names and Descriptions

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

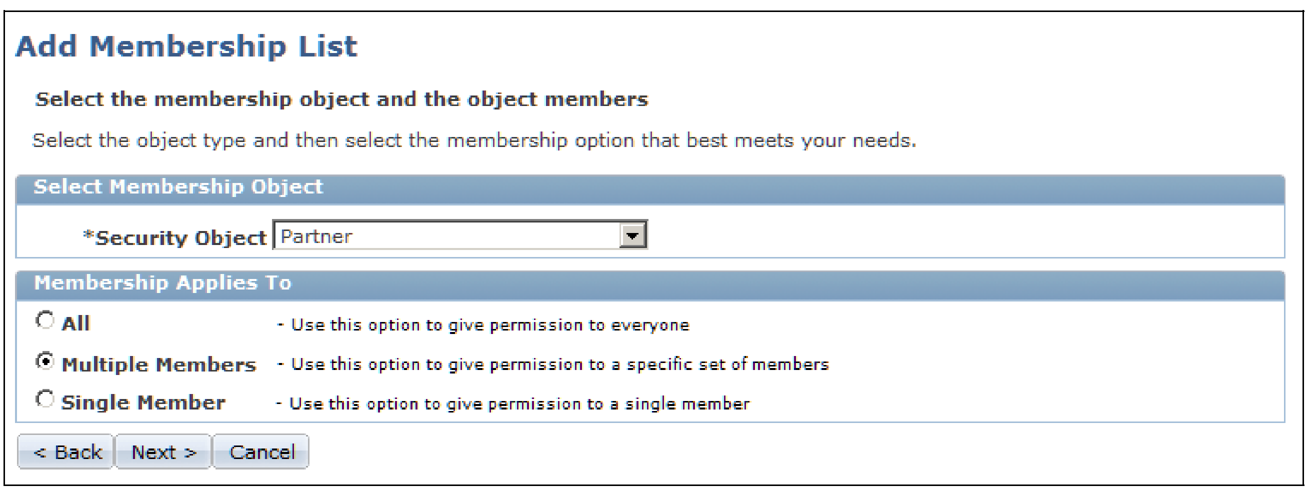



Add Membership List page

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

## Selecting Membership Objects and Object Members

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




Add Membership List page

**Security Object**

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

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

---

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

---

**Membership Applies To**

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

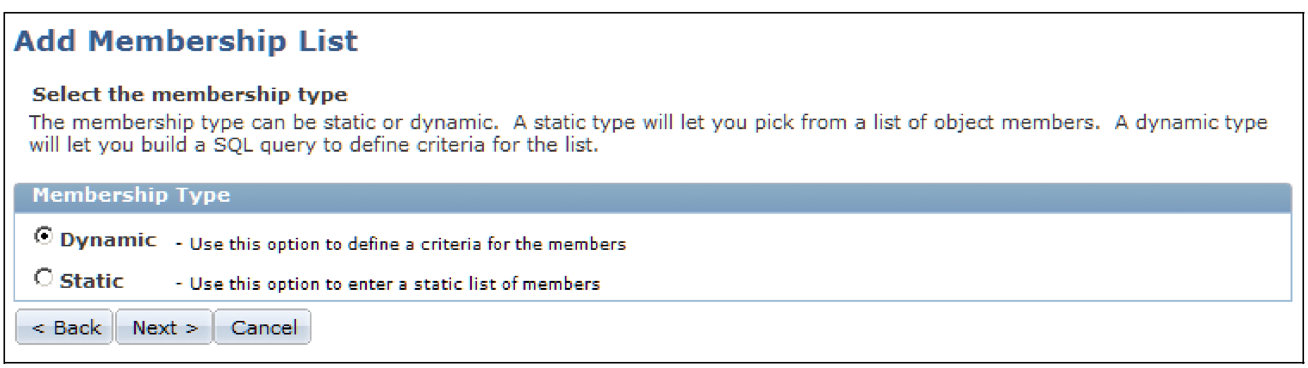
- *All:* Select if you want to the membership list to apply to all members associated with the security object.
- *Multiple Members:* Select if you want the membership list to apply to select group of members that are associated with the security object. When you click Next, the system displays the next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

**Next**

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

## Selecting the Membership Type

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



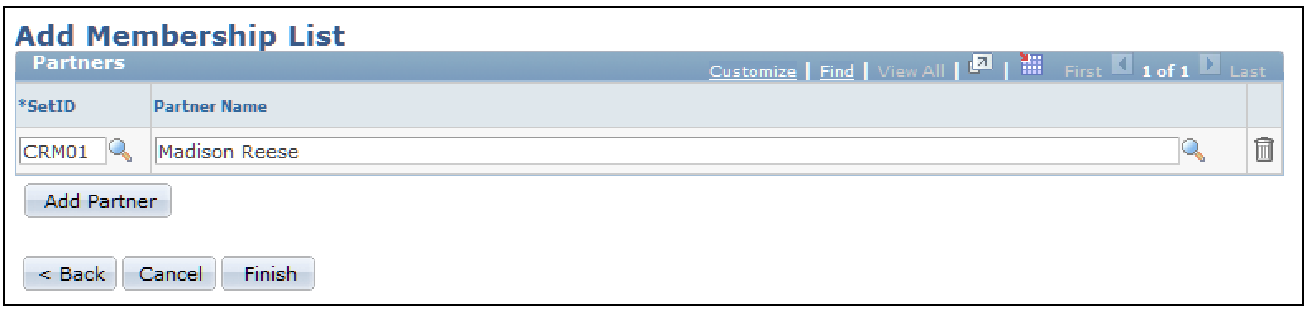

Add Membership List page

| | |
|---|---|
| **Membership Type** | Select from these values:<br>• *Dynamic:* Select to choose a dynamic list of members. When you click Next, a search page appears based on the security object that you selected on the second Add Membership List page.<br>• *Static:* Select to choose a static list of members. When you click Next, a page appears based on the security object that you selected on the second Add Membership List page. |
| **Next** | Click to go to the next page. The system displays a new page based on the selections that you made on the previous pages. |

## Adding Members to a Static Membership List

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



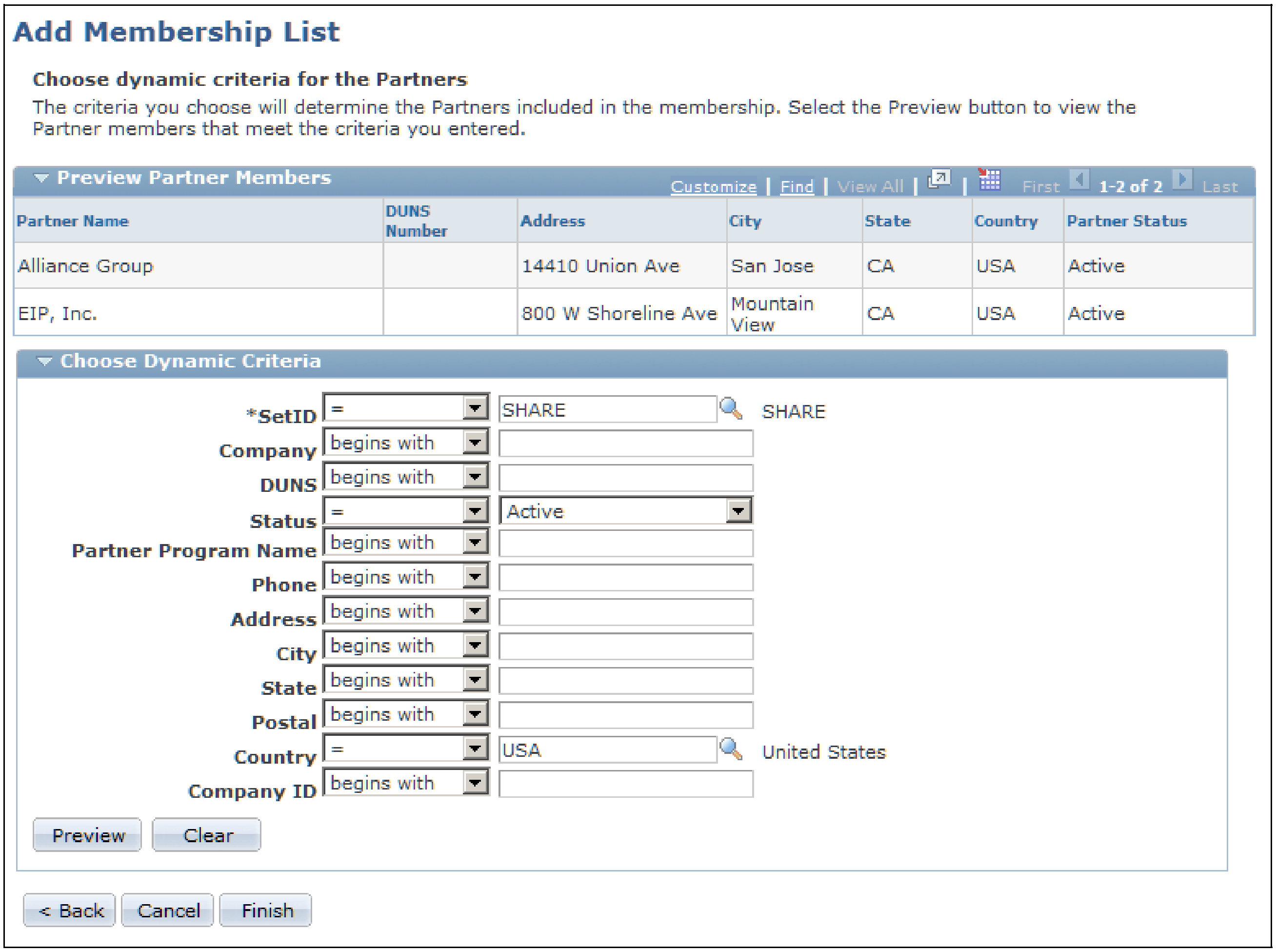

Add Membership List (static) page

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

## Choosing the Dynamic Criteria for the Membership List

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




Add Membership List page

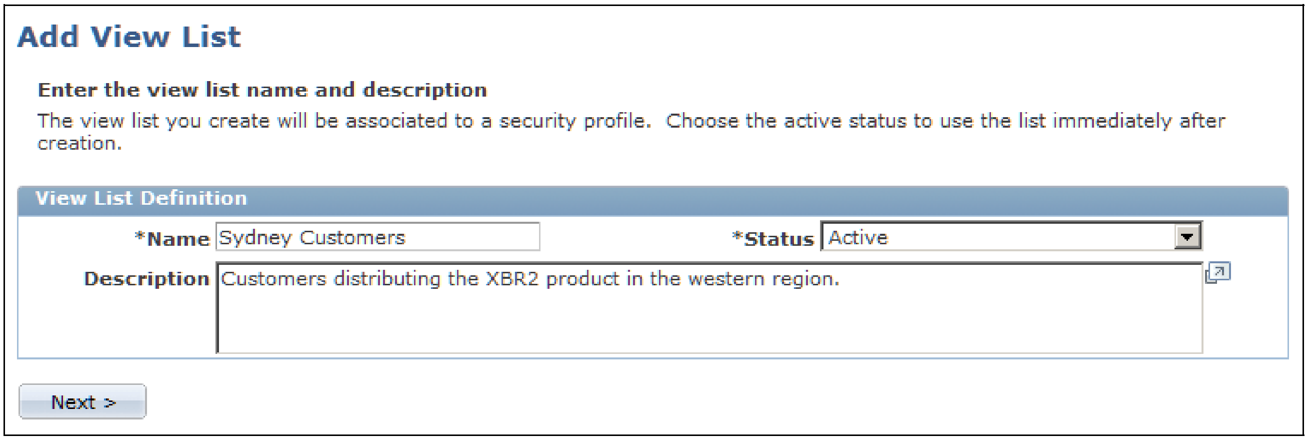
Select or enter the criteria that you want to use to create a membership list. The system uses the criteria that you select to create a dynamic membership list. To view the results of the criteria that you enter, click the Preview button. When you are satisfied with the results, click the Finish button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

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

## Adding View List Names and Descriptions

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

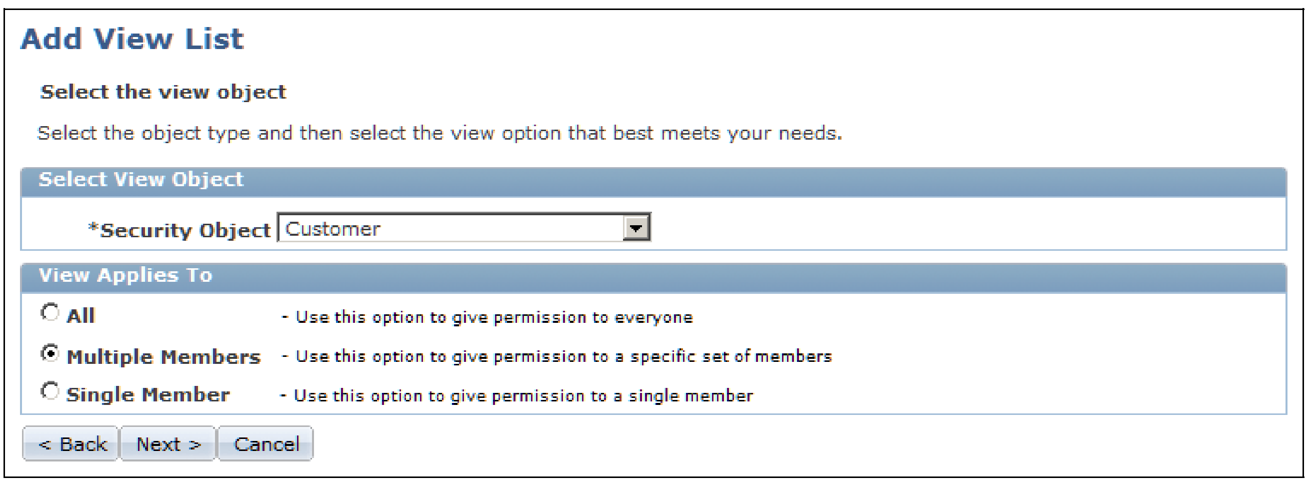



Add View List page

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

## Selecting View Objects and Options

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




Add View List page

**Security Object**

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

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

---

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

---

**View Applies To**

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

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

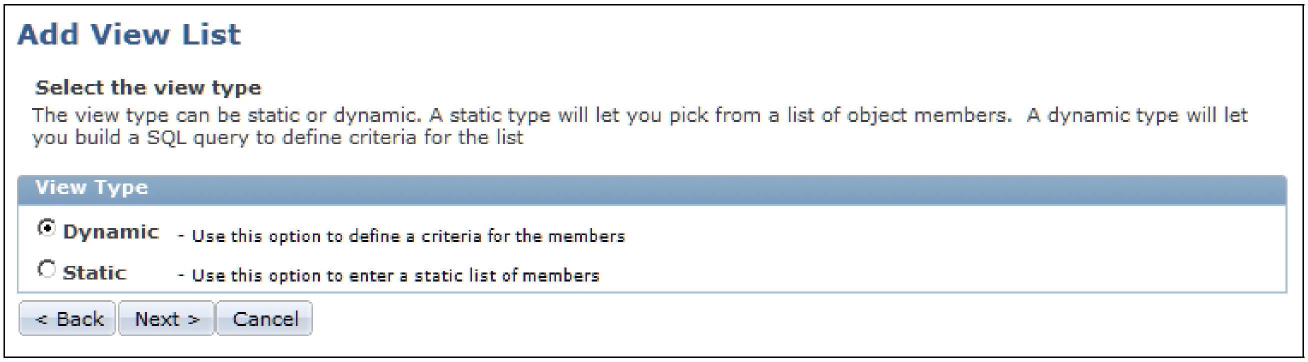
**Next**

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

## Selecting the View Type

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




Add View List page

**View Type**

Select one of these values:

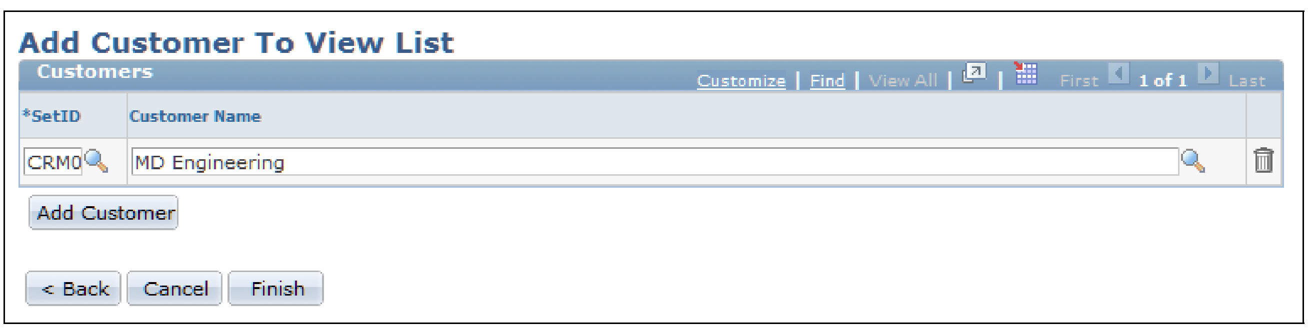
- *Dynamic:* Select to define criteria for a dynamic list of members that you want included in your view list. When you click Next, a search page appears based on the security object that you selected on the second Add View List page.
- *Static:* Select to choose a static list of members. When you click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

**Next**

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

## Adding Members to Static View List

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

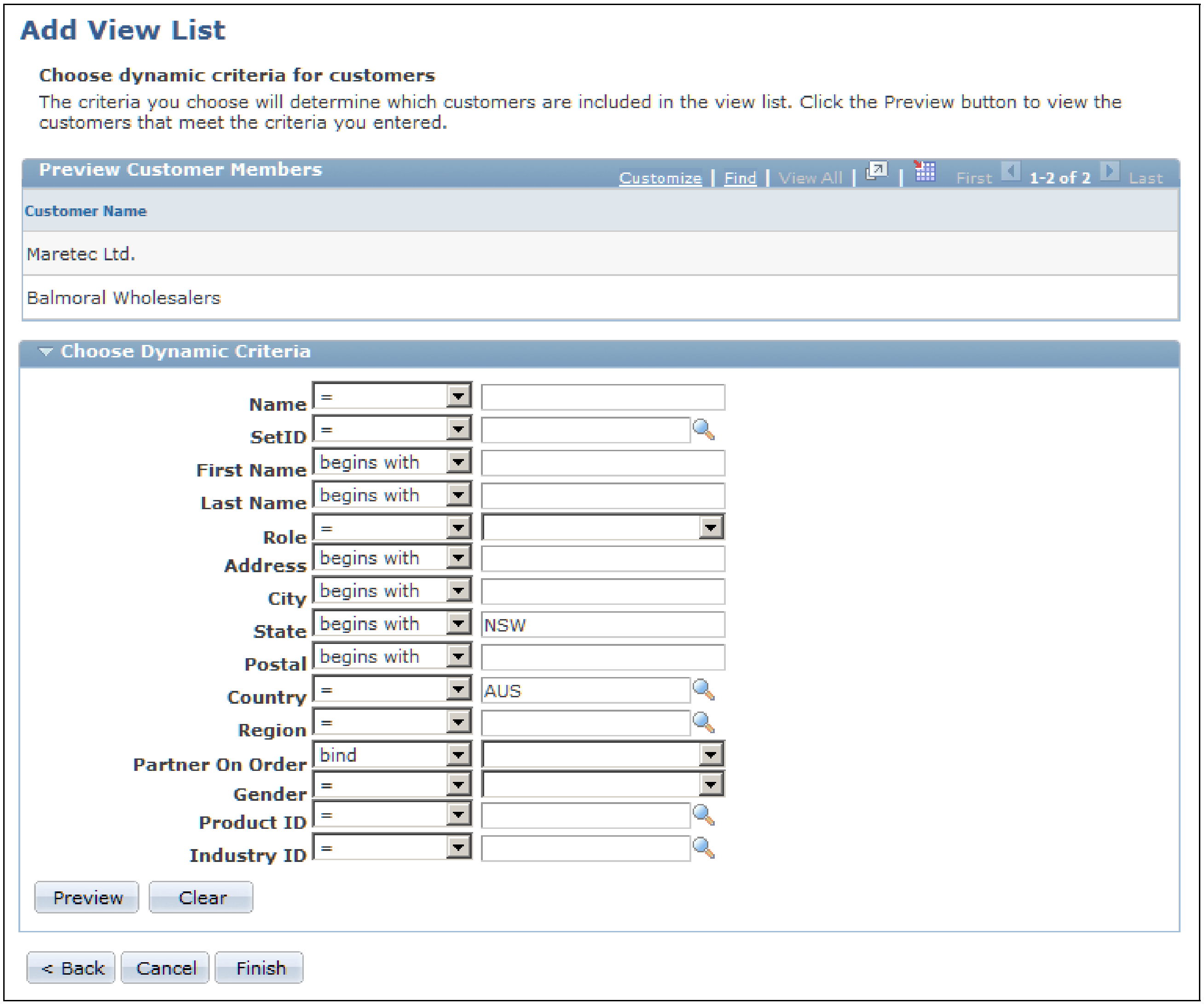



Add View List (static) page

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

## Choosing the Dynamic Criteria for the View List

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



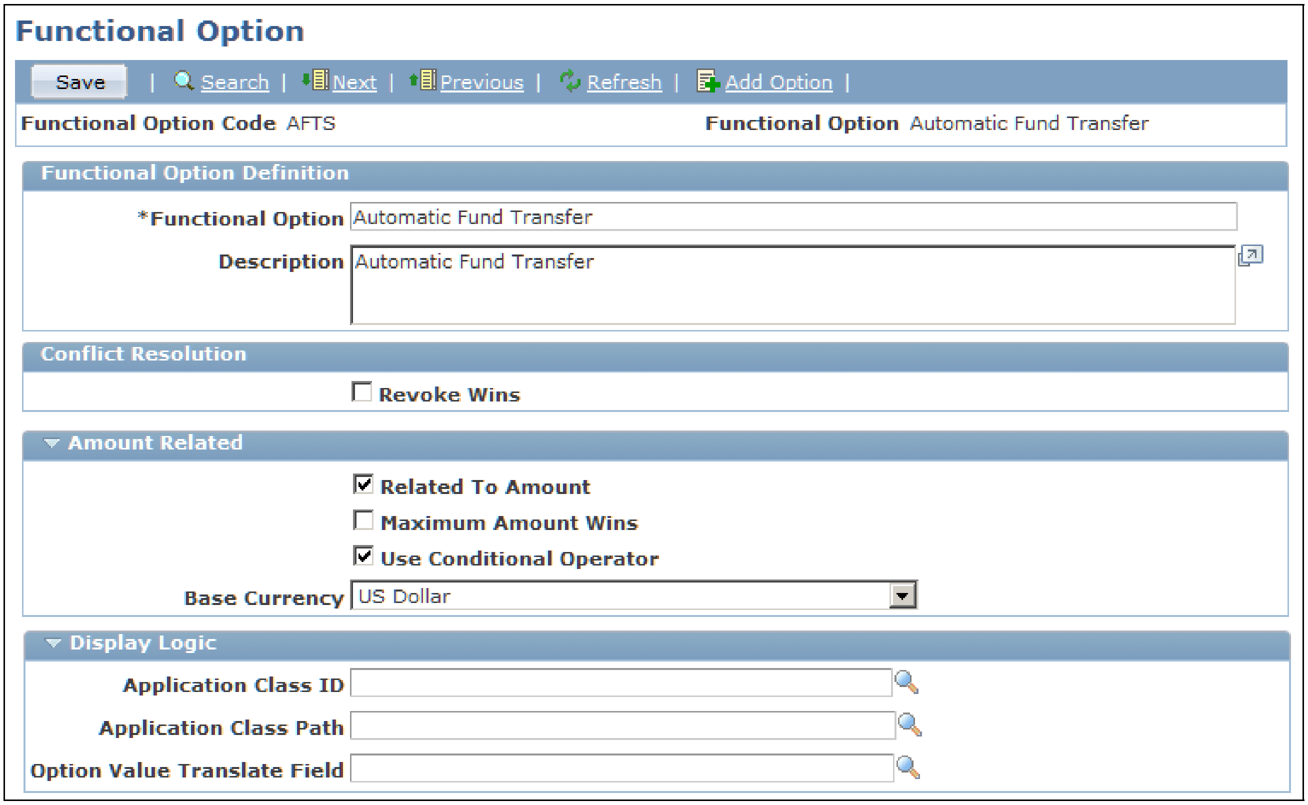

Add View List page

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

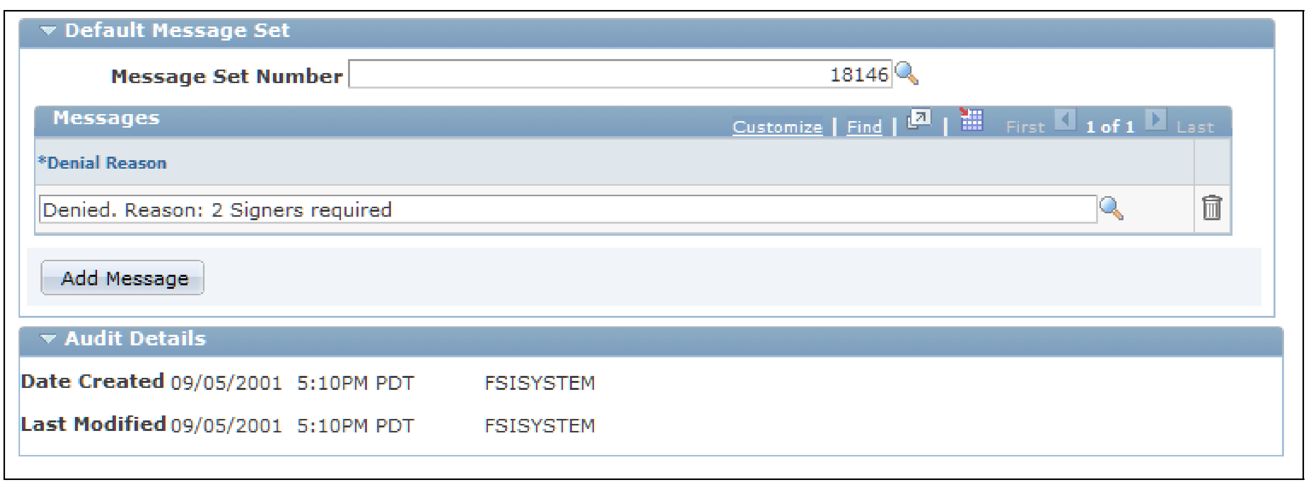
## Defining Functional Options

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




Functional Option page (1 of 2)




Functional Option page (2 of 2)

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

**Revoke Wins**

Conflicts may happen when a user is associated with multiple security profiles using functional options that conflict or when the same security profile has overrides for conflicting functional options. Select this check box if you want the system to not override the security for the functional option that you are creating when there are conflicts within or among different security profiles.

---

**Note.** If one functional option group grants an option and another revokes it, the revoke takes precedence. If the Revoke Wins check boxes are not selected in the same scenario, the option is granted.

---

**Related to Amount**

Select to enable amount-related fields during the setup of functional option groups and specific functional options within the security profile.

**Maximum Amount Wins**

Select this check box to indicate that you want the maximum amount to win when there are functional options that conflict within or among different security profiles

**Use Conditional Operator**

Select to enable the conditional operator field during the setup of functional option groups and specific functional options within the security profile for amount-related fields.

**Base Currency**

Select the currency that is used most often for the functional option that you are creating.

**Application Class ID, Application Class Path,** and **Option Value Translate Field**

Use these fields if you are writing PeopleCode programs required to evaluate the functional option. Select the ID and path of the application class that the system carries out when a user accesses the function or when the program runs. Also, you can specify a value translate field with values that will be interpreted by the calling application to perform a specific functional action. For example, the display template uses a translate field that makes the fields display-only or changeable.

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

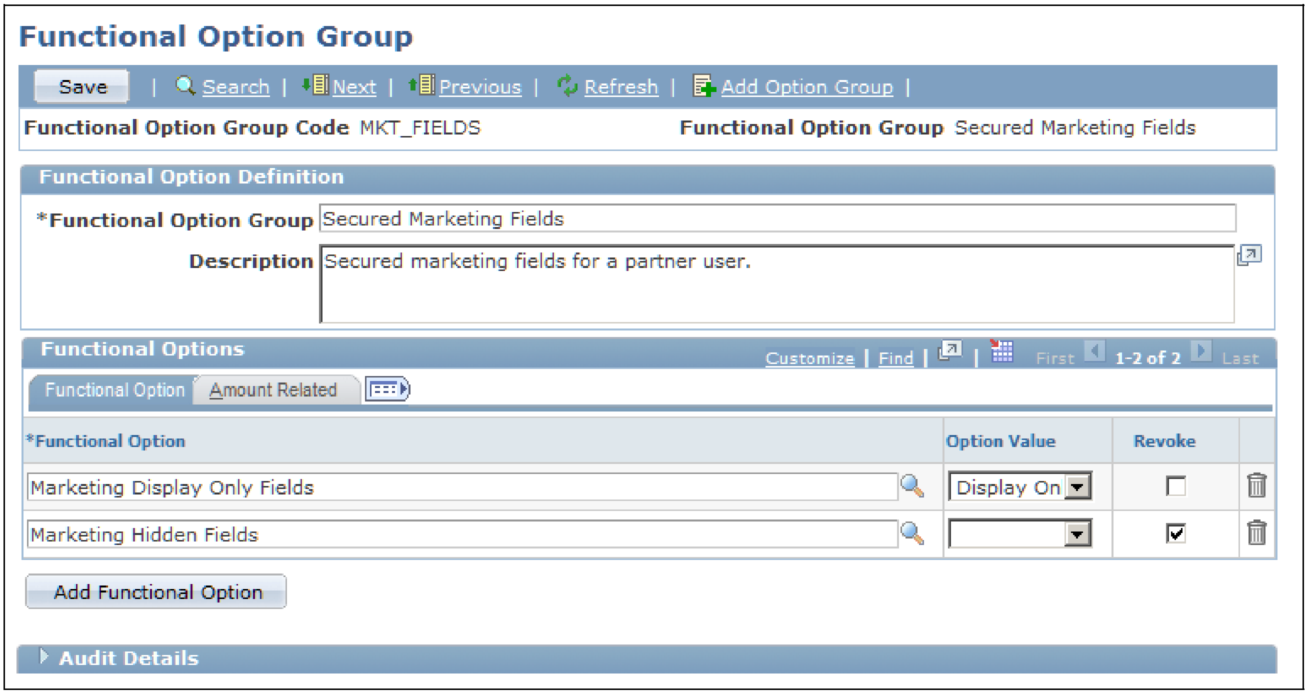
**Message Set Number** and **Denial Reason**

Select the message that you want the system to display if a user is denied access to the function.

## Defining Functional Option Groups

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




Functional Option Group page

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

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

### *Functional Option Tab*

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

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

**Revoke**

Select this check box if you want the system to override the security for the functional option when there are conflicts within or among different security profiles.

---

**Note.** Revoke applies to the functional option only (for example, does a user have authorization to transfer money). If one functional option group says yes and another says no, the functional option that has the *Revoke Wins* check box selected wins and resolves the conflict.

For transfer amounts, there is another type of conflict resolution called *Max Amount Wins.* In this situation, if one functional option group gives you access to 2000 USD and another gives you access to 3000 USD, the maximum amount wins and you have the authority to transfer up to 3000 USD.

---

**Add Function Option**

Click to add a new row in the functional option grid.

### *Amount Related Tab*

The fields that appear on this page are used if the functional option is associated with an amount field.

**Conditional Operator**

Select the conditional operator (for example, equal to, less than, greater then, and so on) that you want to use for the functional option.

**Amount**

Enter the amount that you want associated with the conditional operator for the functional option.

**Denial Reason**

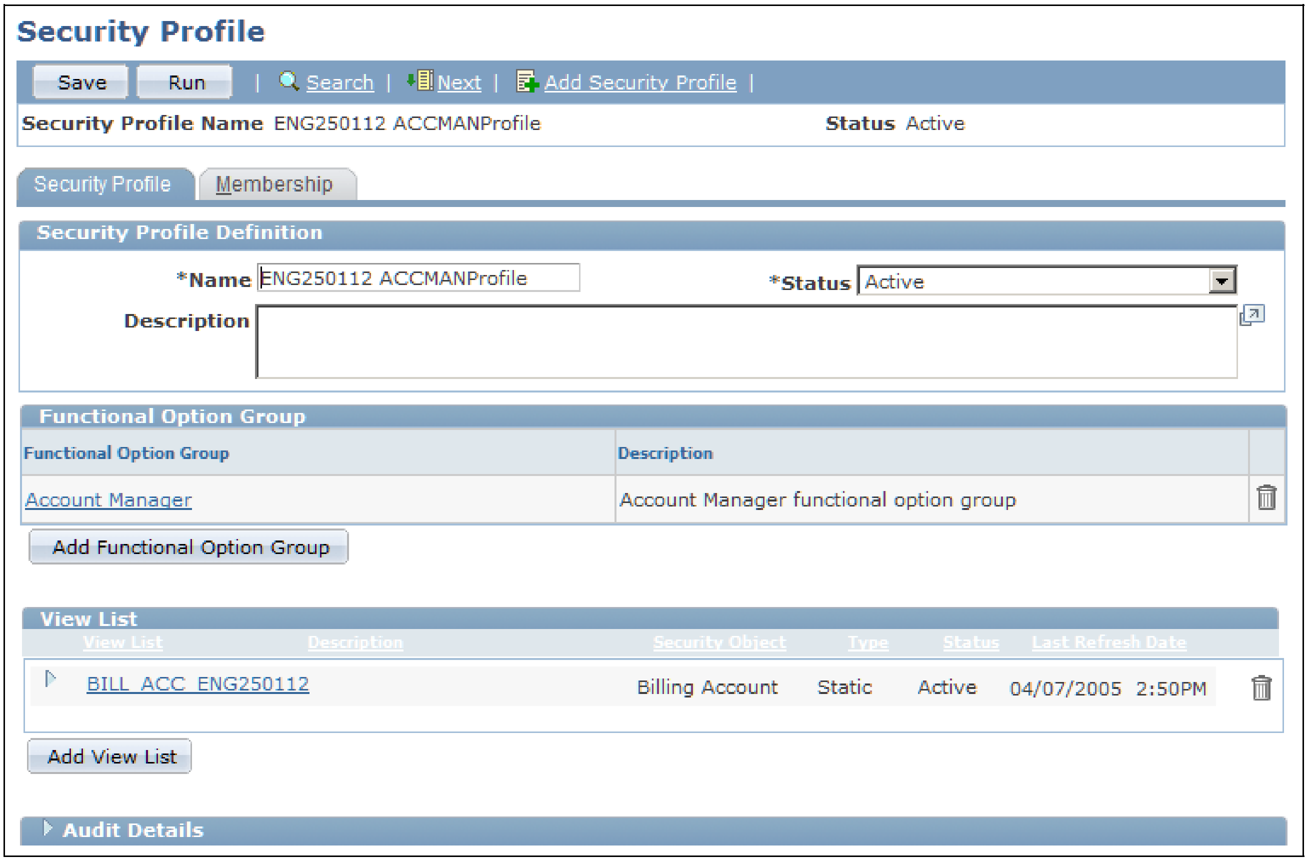
Select the reason that you want the system to display if the user is denied access to the transaction related to the functional option.

For example, let's say you have given order capture representatives the ability to override prices. At some point in the season, you may want all of them to be denied from overriding prices on the items that you sell. You can go to the functional option group definition and set the Revoke Wins check box. From that point onward, the order capture representatives are denied from doing price overrides. You can set up similar situations for leads, opportunities, cases, and so on.

## Adding Functional Option Groups and View Lists to the Security Profile

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




Security Profile page

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

---

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

---

**Name** and **Description**

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

**Add Functional Option Group**

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

**Add View List**

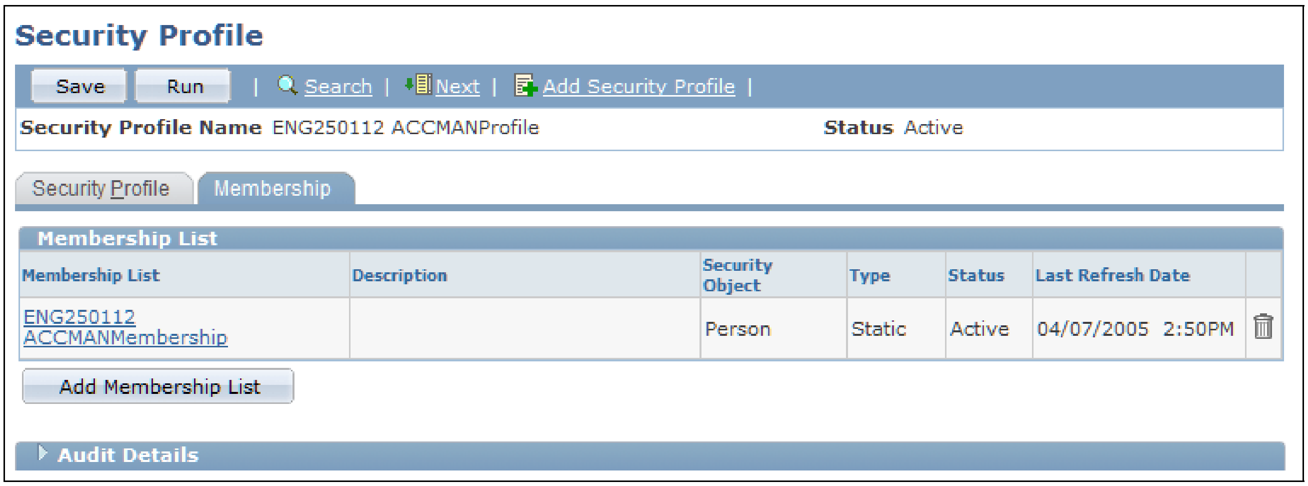
Click to access the Add View List page, where you can select the view lists that you want to include in the security profile.


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

## Adding Membership Lists to the Security Profile

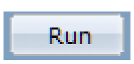
Access the Security Profile - Membership page (Set Up CRM, Security, CRM Application Security, Add Security Profile, Membership).




Security Profile - Membership page

**Add Membership List**

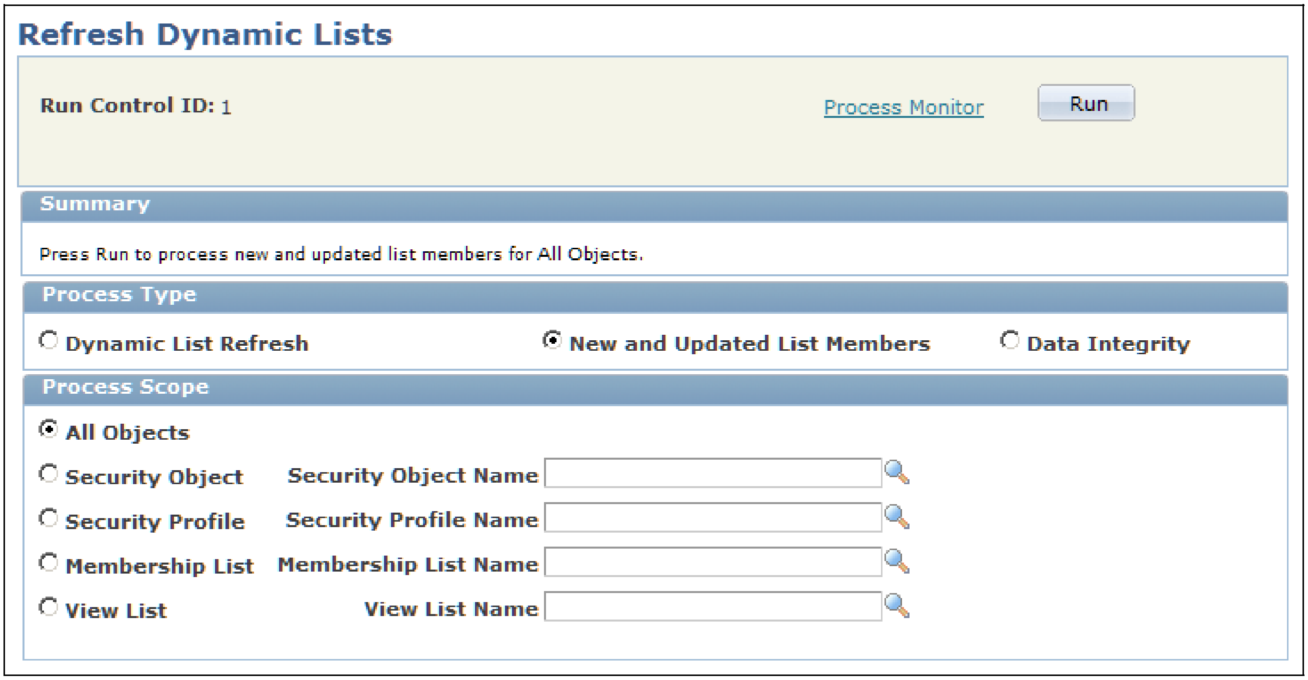
Click to access the Add Membership List page, where you can select the membership lists that you want to include in the security profile.




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

## Setting Run Controls for the List Build Process

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




Refresh Dynamic Lists page

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

---

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

---

**Process Type**

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

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

**Process Scope**

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

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

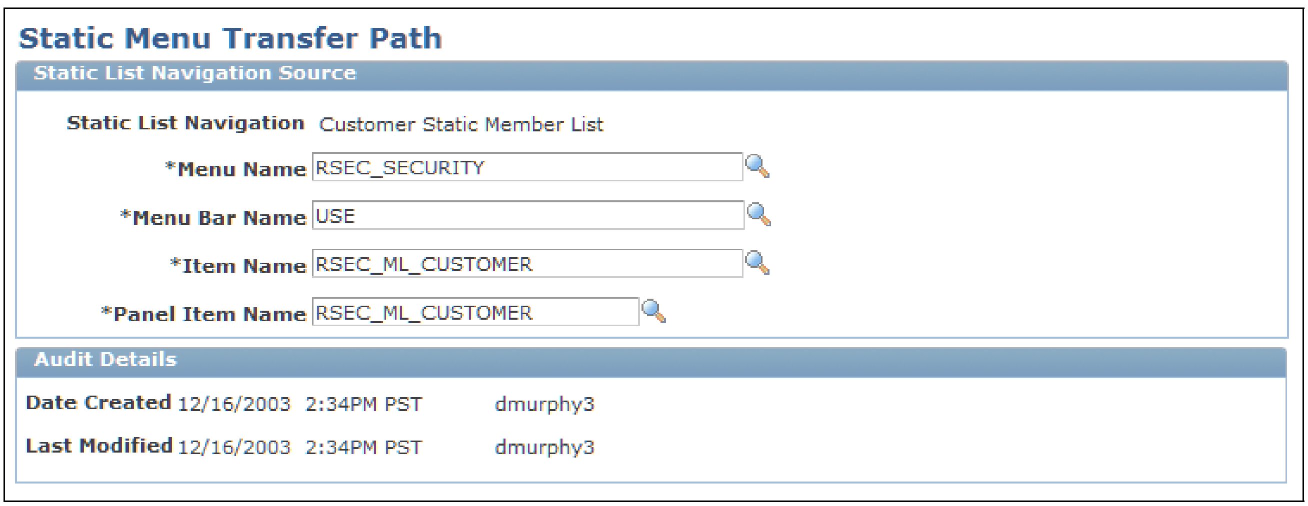
---

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

---

## Entering Static Menu Transfer Paths

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




Static Menu Transfer Path page

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

## Chapter 5

# Working with Notes and Attachments

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

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

## Understanding Notes and Attachments

This section discusses:

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

### Notes in PeopleSoft CRM

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

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

#### *The Notes List Component*

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

#### *Notes Pages*

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

### *Note Details*

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

### *Notes Summary*

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

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

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

## Attachments

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

See the installation guides on My Oracle Support.

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

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

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

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

## Note Types

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

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

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

***See Also***

Chapter 5, "Working with Notes and Attachments," Setting Up Note Types, page 139

# Setting Up Note Types

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

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

## Pages Used to Set Up Note Types

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

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

# Creating Standard Notes and Product Notes

This section discusses how to:

- Create standard notes.
- Create product notes.

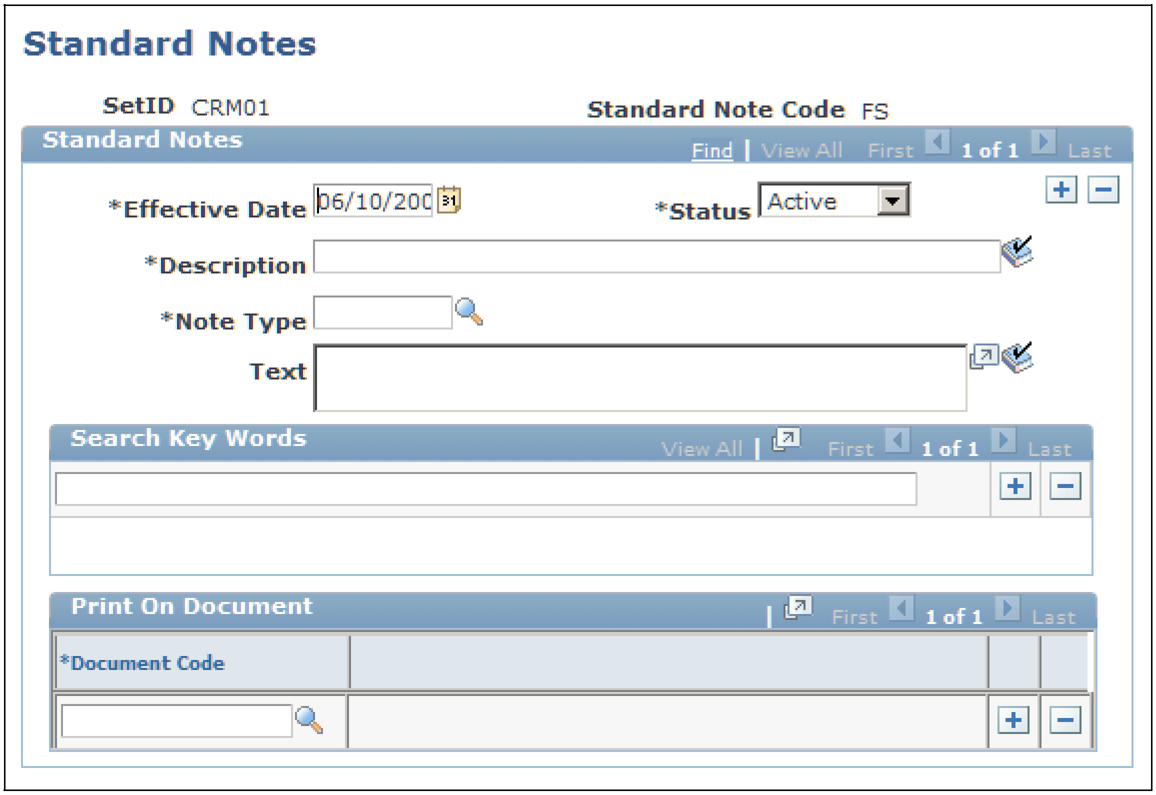
## Pages Used to Create Standard Notes and Product Notes

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Standard Notes | STD_NOTE | Set Up CRM, Common Definitions, Notes, Standard Notes, Standard Notes | Create a standard note. |
| Product Notes | PROD_NOTE | Product CRM, Product Notes, Product Notes | Create product notes. |

## Creating Standard Notes

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




Standard Notes page

**Text**

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

**Search Key Words**

Enter keywords to select notes for reporting.

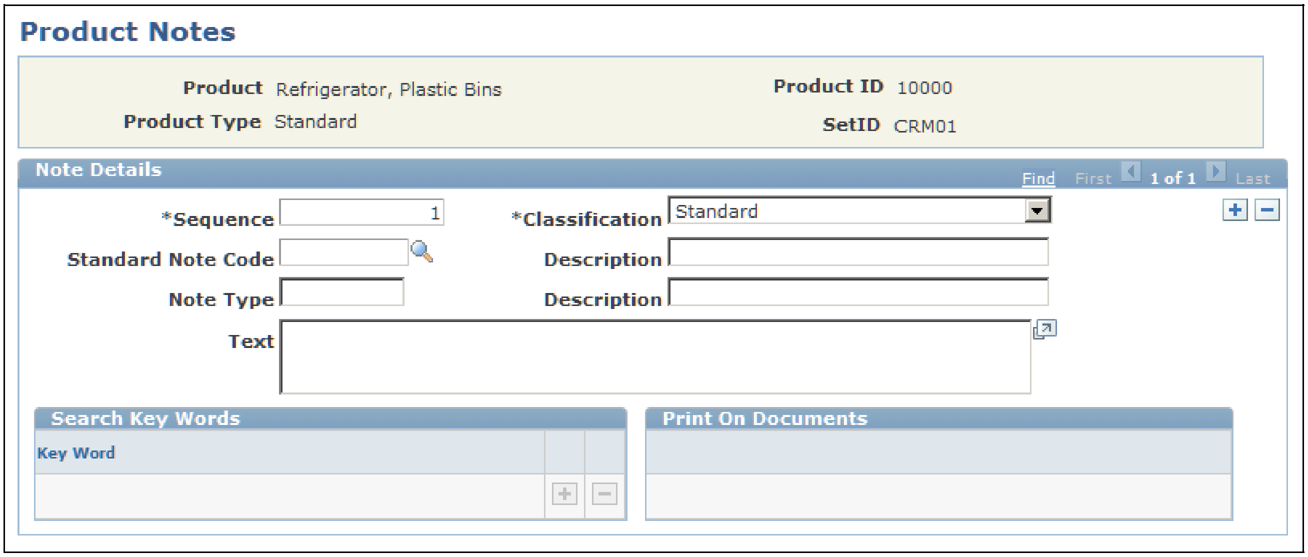
**Print On Document**

Not applicable to standard notes.

## Creating Product Notes

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




Product Notes page

**Search Key Words** Enter keywords to select notes for reporting.

**Print On Documents** Not applicable for product notes.

# Entering and Viewing Notes

This section discusses how to:

- View lists of notes.
- Enter notes.

---

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

---

## Pages Used to View and Enter Notes

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

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

## Viewing Lists of Notes

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


Notes List - Company Notes page: Note Details tab

### *Note Details*

Select the Note Details tab.

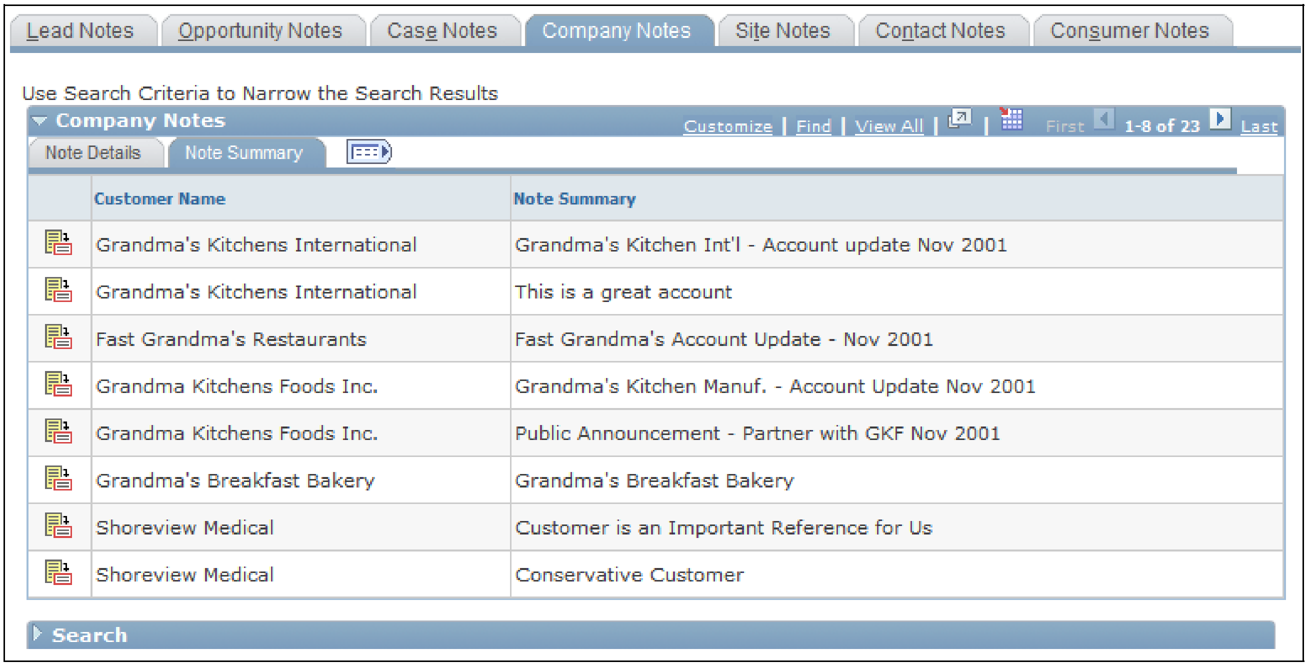
Click the View Detail button to transfer to the Notes page of the corresponding component to view note summary and details.

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

### *Note Summary*

Select the Note Summary tab.




Notes List - Company Notes page: Note Summary tab

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

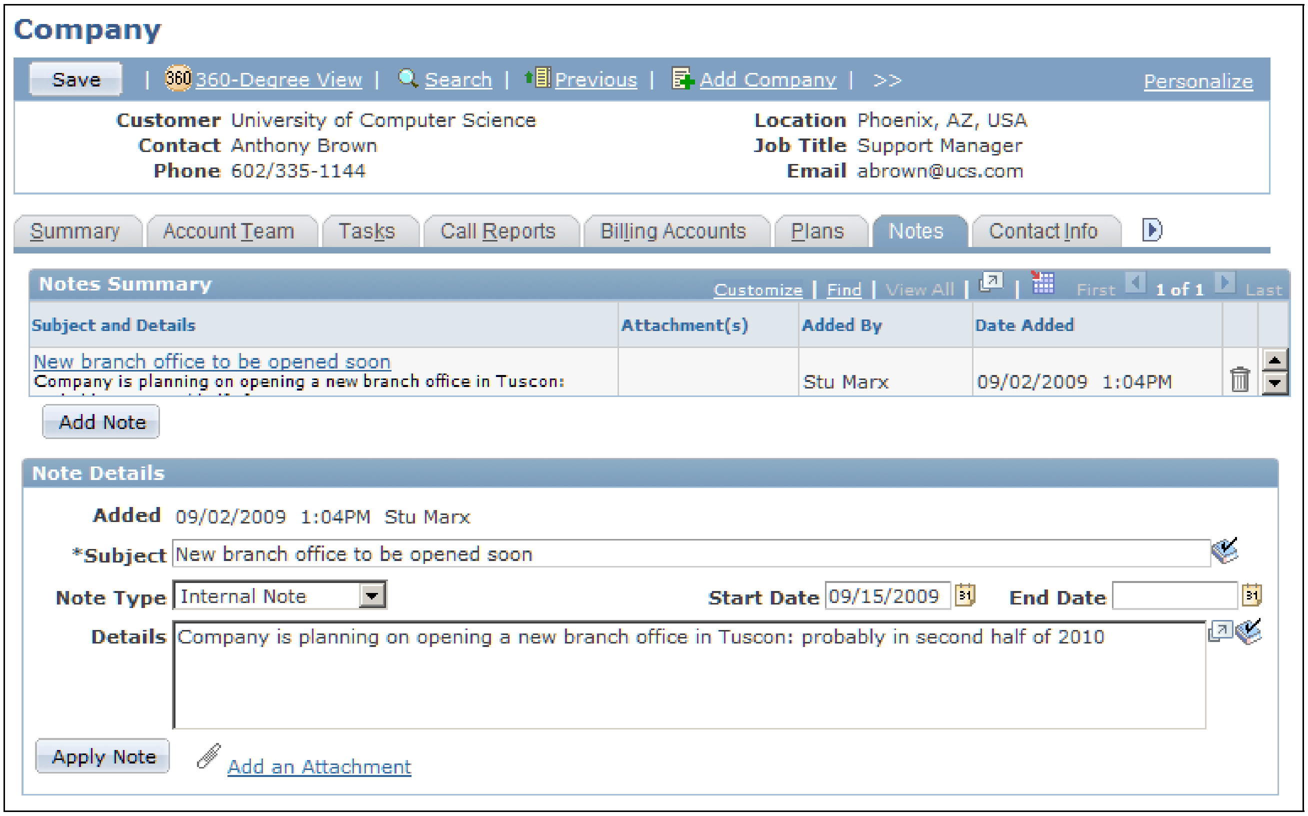
## Entering Notes

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

---

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

---




Notes page

### Notes Summary

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

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

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

**Add Note** Click this button to add a new note to the transaction.

### Note Details

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

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

| | |
|---|---|
| **Note Type** | Select a classification for the note. Values are defined differently depending on the parent object. This functionality is not available in all components.<br><br>See  and Chapter 5, "Working with Notes and Attachments," Note Types, page 138. |
| **Contact Information** | Used in Call Center case notes to identify a contact to be associated for this specific note. |
| **Details** | Enter the full text of the note. |
| **Apply Note** | Click to update the Notes Summary list with the note that you entered.<br><br>**Note.** Click the Apply Note button to add the note to the Notes Summary grid. The note is not saved to the component until you save the component. |
| **Add an Attachment** | Click to add an attachment to the note. |

# Adding Attachments to Notes

This section discusses how to add attachments to notes.

## Selecting a File to Add as an Attachment

To add an attachment to a note:

1. Access the Notes page for the object to which you are adding an attachment.

   **Note.** Normally you add attachments to notes. In the Product component, however, you add attachments directly to the product.

2. Click the Add an Attachment button.

   Enter the full path (including the file name) of the file to attach.

3. In the dialog box that appears, enter the full path name of the file to attach, or browse to the file.

4. Click the Upload button.

   The system uploads the specified file to the server that is configured to store all of the PeopleSoft CRM attachments. Large files may take a long time to upload. When the upload is complete, the system displays the Notes page again. If the upload was successful, the file appears on the page.

5. Add descriptive information about the file.

   If the parent object is a note, you can also use the note to record a longer comment about the attachment.

6. Save the component.

## Chapter 6

# Using Interactive Reports

This chapter provides overviews of interactive reports and delivered system data for interactive report and discusses how to launch interactive reports.

## Understanding Interactive Reports

This section discusses:

- Interactive reports and the Analytic Calculation Engine.
- Delivered report and query definitions.

### Interactive Reports

PeopleSoft Customer Relationship Management (PeopleSoft CRM) interactive reports are based on the PeopleSoft business analysis modeler tool Analytic Calculation Engine (ACE).

Use the interactive reports to view transactional data in multidimensional online reports. For example, a PeopleSoft Call Center business analysis modeler report might have two dimensions: customer and product. This enables users to display the number of cases in four ways—customer, product, customer within product, or product within customer.

Interactive reports can have more than two dimensions, which enable users to organize data in a variety of ways that serve various business purposes. Users drag and drop the available dimensions to reconfigure the report view as they use it. For example, in viewing a call center report, a user might add another available dimension such as *month* as a third dimension.

Users can filter interactive report data by selecting a single value for any dimension. For example, a user can limit a report so that only cases for one customer, organized by product and then by month, appear. This filtering capability provides the user with an overview of the products that are giving the customer trouble, as well as whether the number of cases that are reported against each product is decreasing or increasing.

Access to an Interactive Report is controlled by user roles. The user can export report data to Microsoft Excel or print a hard copy. While you can interact with these reports by modifying data and moving data elements (dimensions) on the reports, the communication between the report and PeopleSoft CRM is one-way—changes you make to interactive report data are local only, and do not affect the original source data in the PeopleSoft CRM database. Also, you cannot transfer from an interactive report to any PeopleSoft CRM components in order to access data.

PeopleSoft ACE is a PeopleTools product. For information on installing and setting up interactive reports using ACE, see the following references listed.

### *See Also*

*PeopleTools 8.52: Analytic Calculation Engine PeopleBook*

## Delivered Report and Query Definitions

PeopleSoft CRM provides these interactive report definitions:

| ***Report Description*** | ***Application*** |
|---|---|
| Campaign Performance Forecast | Marketing |
| Dialog Performance Forecast | Marketing |
| Dialog Survey Report | Marketing |
| Workforce Survey Analysis | Marketing |
| Service Level Management | Support |
| Service Operations Analytics | Support |
| Utilization Rate | FieldService |
| Service Order Summary | FieldService |
| Service Order Aging | FieldService |
| Change Request Metrics | HelpDesk |
| Forward Schedule of Changes | HelpDesk |
| Service Level Agreement | HelpDesk |
| Enterprise Order Metrics | Order Capture |
| Enterprise Order Revenue | Order Capture |
| Order Revenue | Order Capture |
| Order Metrics | Order Capture |
| Sales Compare of Forecasts | Sales |
| Sales Activity Forecasts | Sales |
| Lead Acceptance | Telesales |

| ***Report Description*** | ***Application*** |
|---|---|
| Lead Quality | Telesales |
| Sales Conversion Rate | Telesales |
| Sales Effectiveness | Telesales |
| Dialog Performance Report | Online Marketing |

Each report has an accompanying query definition that is similarly named to the report definition.

## Launching Interactive Reports

Each PeopleSoft CRM application that delivers an interactive report provides documentation for viewing that specific report.

See  and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "PeopleSoft Call Center Interactive Reports."

See  and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working with Interactive Reports for Order Capture."

See  and *PeopleSoft Workforce Communications 9.1 PeopleBook*, "Analyzing Program and Dialog Results," Understanding Workforce Reports.

See  and *PeopleSoft Sales 9.1 PeopleBook*, "Understanding Sales Interactive Reports."

See  and *PeopleSoft CRM 9.1 Marketing Applications PeopleBook*, "Using Interactive Reports in PeopleSoft Marketing Applications."

See  and *PeopleSoft Integrated FieldService 9.1 PeopleBook*, "PeopleSoft Integrated FieldService Interactive Reports."

## Chapter 7

# Setting Up Currencies

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

- Set up currencies.
- Calculate currency exchange.

## Understanding Currencies

This section discusses:

- Currency management in PeopleSoft Customer Relationship Management (PeopleSoft CRM).
- Direct and indirect rate quotations.
- Triangulation.
- Automatic reciprocation of quote methods.

### Currency Management in PeopleSoft CRM

PeopleSoft CRM enables you to manage financial information in multiple currencies and perform currency conversions. The Currency Code table that PeopleSoft CRM delivers defines many common currencies that are identified by the International Standards Organization (ISO) standard, including the European common currency (euro). You can update the currency definitions on this table or enter new ones.

**Note.** The Currency Code table supports the ISO standard of zero, two, and three decimal positions.

PeopleSoft supports direct and indirect rate quotation, quote units, and triangulation to provide you with flexible tools to convert and manage multicurrency operations. The currency quotation method controls how a stored rate appears and how an entered rate is interpreted and stored in the database.

You can set up a currency quotation method for each from and to pair of currencies that you use. Define currency quotation options before entering and calculating rates.

## Direct and Indirect Rate Quotations

An exchange rate is the price of one currency, such as the British pound, in terms of another currency, such as the U.S. dollar. Exchange rates are quoted directly or indirectly. Most countries use the direct method. With this method, the exchange rate indicates how much of the local currency is exchanged for one unit of the foreign currency. For example, suppose that one has to pay .6326 pounds to obtain one dollar, the direct quotation is 1 USD = .6326 GBP.

With the indirect method the exchange rate is expressed as the amount of foreign currency that is required to purchase one unit of the domestic currency. In the preceding example, the indirect quotation is 1 GBP = 1.5814 USD.

## Triangulation

Triangulation is used in hyperinflationary environments in which all conversions to the local currency are done through a reference currency—a stronger, more stable currency, such as the U.S. dollar.

For currency pairs that triangulate, you do not typically maintain rates online. Instead, the Cross Rate/Triangulation Generation SQR (Structured Query Report) uses these three exchange rates:

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

Typically, you do not maintain these rates directly.

Set up the currency quotation methods correctly to yield the correct results for triangulation. Two fields store the rate conversion factor: RATE_DIV and RATE_MULT. With these in mind, the currency conversion formula is always(From currency / RATE_DIV) * RATE_MULT = To currency.

For example, converting from the Russian rouble (RUR) to the Brazilian real (BRL) through the U.S. dollar (USD) is a two-step conversion. First, the RUR is converted to the USD using the appropriate triangulated rate (which uses the RUR to USD component of the triangulated rate that is stored in RATE_DIV). Second, the USD is converted to the real by using the fixed exchange rate (which uses the USD to BRL component of the triangulated rate that is stored in RATE_MULT).

It was a legal requirement to use triangulation to convert currencies participating in the euro prior to January 1, 2002. Even after an enterprise has switched over to the euro, it is necessary to keep historical data available in the national currency unit in order to maintain an audit trail. In most countries, national law requires enterprises to keep accounting records in their original form for at least 5 to 10 years. This is important to avoid synchronization problems between the legacy and the converted systems. For example, representing amounts dated before the euro came into existence in euro could cause anomalies when comparing data that was collected during the floating-rate era before January 1, 1999.

Conversion of historical data requires that you convert all instances of the same data in exactly the same way. This can cause rounding differences with non-normalized data, as is commonly the case in data warehouses that support management information systems (MIS) or decision support systems (DSS). Each organization must decide how significant such differences are in the context of the data use, which might be merely for internal trend analysis.

## Automatic Reciprocation of Quote Methods

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

This table lists each possible value with its reciprocal value:

| ***Page Element*** | ***Value (for RUR to BRL)*** | ***Reciprocal Value (for BRL to RUR)*** |
|---|---|---|
| Rate Quotation Basis | Direct<br>Indirect | Indirect<br>Direct |
| Quote Units | Any value | Same value |
| Rate Decimal Positions | 4 (default value) | Same value |
| Auto Reciprocate | Yes<br>No | Yes<br>No |
| Triangulate | Yes<br>No | Yes<br>No |
| Reference Currency | Any value | Same value |
| Primary Visual Rate | From - To (RUR - BRL)<br>From - Reference (RUR - USD)<br>Reference - To (USD - BRL) | From - To (BRL - RUR)<br>Reference - To (USD - RUR)<br>From - Reference (BRL - USD) |
| Cross-Rate Allow Override | Yes<br>No | Yes<br>No |
| Cross-Rate Recalculate | From - Reference (RUR - USD)<br>Reference - To (USD - BRL) | Reference - To (USD - RUR)<br>From - Reference (BRL - USD) |

# Setting Up Currencies

To set up currencies, use the Currency Code (CURR_CD_TABLE) and Currency Quotation Method (CURR_QUOTE_PNL) components.

This section discusses setting up currencies in PeopleSoft CRM.

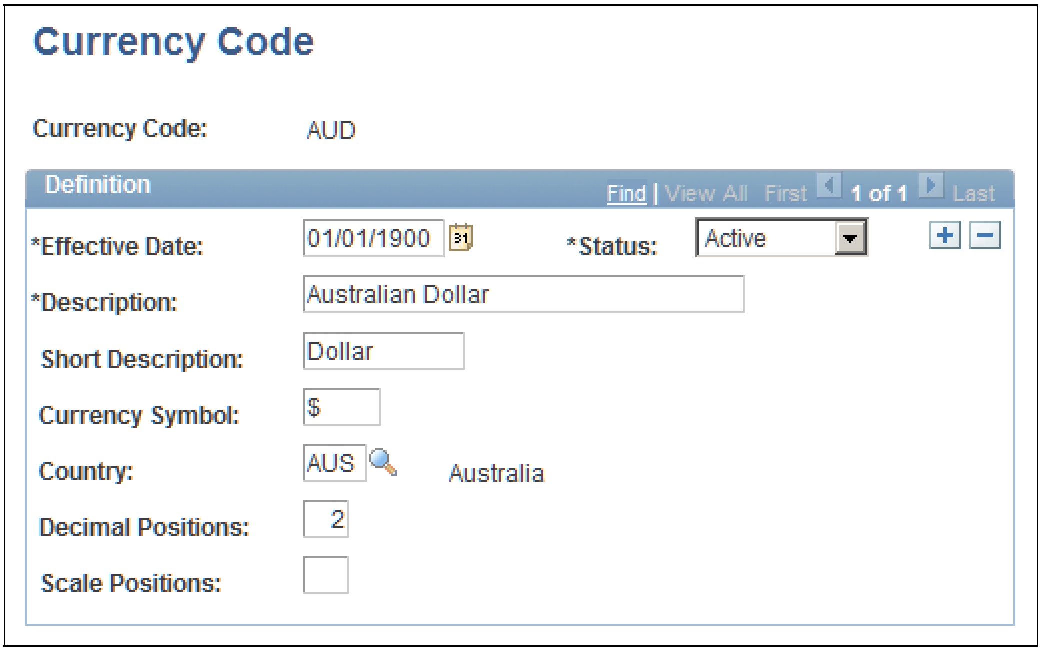
## Pages Used to Set Up Currencies

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Currency Code | CURRENCY_CD_TABLE | Set Up CRM, Common Definitions, Currency, Currency Code, Currency Code | Add or update a currency code. |
| Currency Quotation Method | CURR_QUOTE_PNL | Set Up CRM, Common Definitions, Currency, Currency Quotation Method, Currency Quotation Method | Set up and maintain a currency quotation method for each from currency and to currency pair. |

## Adding or Updating Currency Codes

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




Currency Code page

**Currency Symbol**

Enter a currency symbol. You can change the currency symbol that is delivered with the application or enter new symbols for currencies.

**Scale Positions**

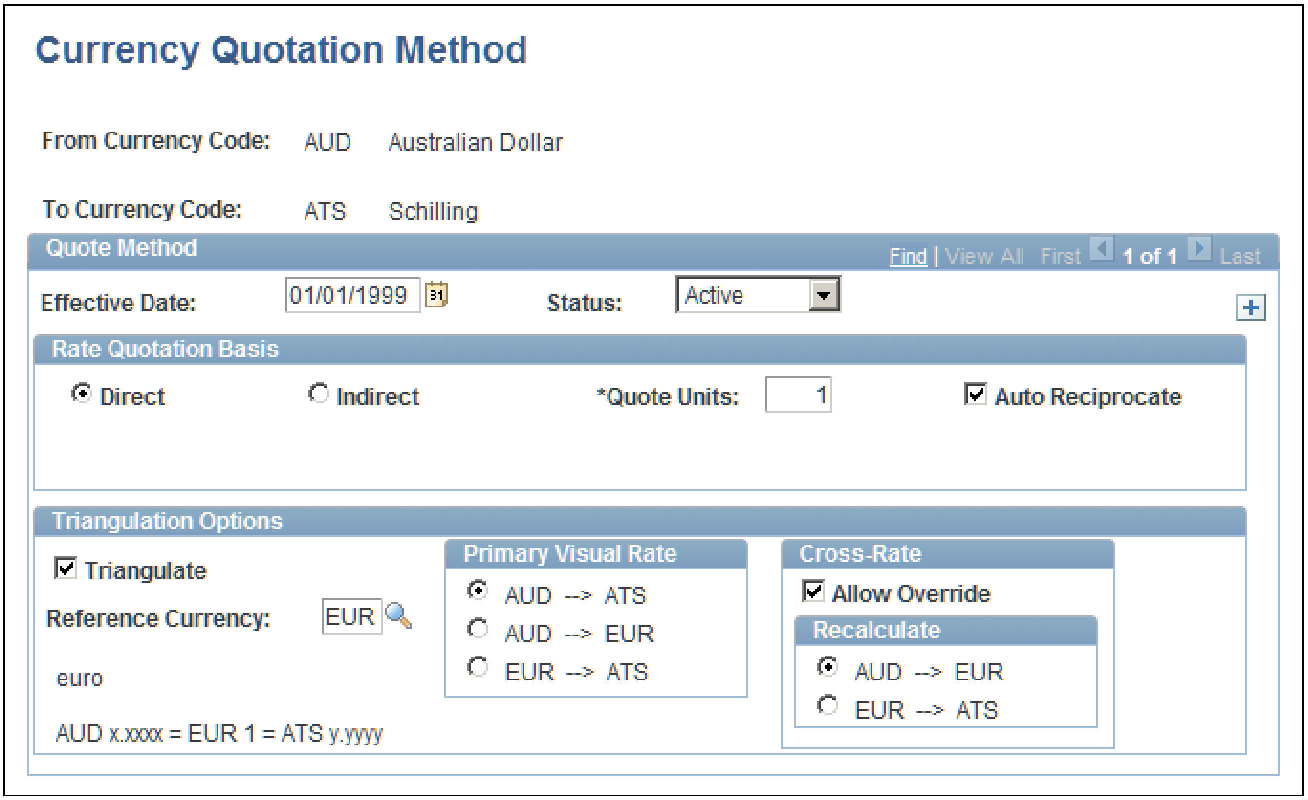
Enter the number of numerals that you want to appear to the left of the decimal. The system rounds numbers accordingly for display, although it actually stores data with full precision in the database.

For example, suppose that you want all million dollar amounts to appear as the number of millions without the zeros, enter *6* as the scale position. In this case, 24,000,000 appears as 24, but it is stored in the database as 24,000,000.

## Setting Up the Currency Quotation Method

Access the Currency Quotation Method page (Set Up CRM, Common Definitions, Currency, Currency Quotation Method, Currency Quotation Method).




Currency Quotation Method page

### *Rate Quotation Basis*

**Direct**

Select if you want direct quotes for currency pairs. For example, for a conversion of dollars to euros, a direct quote indicates that 1 USD = x.xxxx EUR.

**Note.** You must still classify currency pairs that triangulate as either direct or indirect for use in displaying the calculated cross rate.

**Indirect**

Select if you want indirect quotes for currency pairs. For example, for a conversion of dollars to euros, an indirect quote indicates that x.xxxx USD = 1 EUR.

**Note.** You must still classify currency pairs that triangulate as either direct or indirect for use in displaying the calculated cross rate.

**Quote Units**

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

Quote units, sometimes called scaling factors, are used to preserve decimal position. For example, you might state the exchange rate between roubles and dollars as 1000 RUR = 31.4169 USD instead of 1 RUR = 0.031469 USD.

**Auto Reciprocate**

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

### *Triangulation Options*

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

**Triangulate**

Select to convert two currencies through a third currency (the reference currency).

**Reference Currency**

Enter the currency through which the from currency is converted. For example, when the system converts between Russian roubles and Brazilian reals, the reference currency might be the United States dollar.

**Primary Visual Rate**

Select the primary rate. The primary rate appears on primary pages and reports.

**Allow Override**

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

**Recalculate**

Select the method for recalculation.

# Calculating Currency Exchange

This section discusses how to calculate currency exchange.

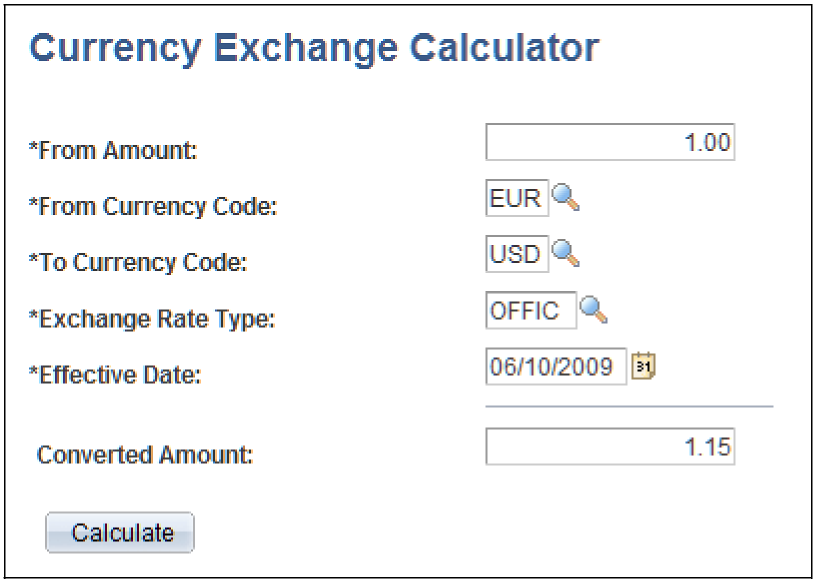
## Page Used to Calculate Currency Exchange

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Currency Exchange Calculator | CURRENCY_EXCHNG_PN | Set Up CRM, Common Definitions, Currency, Currency Exchange, Currency Exchange Calculator | Calculate the currency exchange between currencies. |

## Calculating Currency Exchange

Access the Currency Exchange Calculator page (Set Up CRM, Common Definitions, Currency, Currency Exchange, Currency Exchange Calculator).




Currency Exchange Calculator page

**Effective Date** Enter the date of the currency conversion. The system uses the rate that is effective on the date that you enter.

## Chapter 8

# Setting Up Credit Card Encryption

This chapter provides an overview of credit card encryption and discusses how to:

- Implement credit card encryption.
- Secure the credit card components.
- Change the credit card encryption key.
- Synchronize re-encrypted data with PeopleSoft Financials.

## Understanding Credit Card Encryption

PeopleTools Pluggable Cryptography is an advanced security framework that introduces a new security model for applications to encrypt and decrypt credit card data. This feature adds greater security to the credit card data handling system as well as upgrades existing credit card data.

Credit card encryption is available to PeopleSoft CRM implementations that are integrated with PeopleSoft Financials.

### *Strong Encryption*

Pluggable Cryptography protects critical PeopleSoft data and enables more secure data communication with other businesses. It enables you to extend and improve cryptographic support for your data in PeopleTools. By incrementally acquiring stronger and more diverse algorithms for encrypting data, Pluggable Cryptography offers strong cryptography with the flexibility to change and grow.

Enhanced cryptography capability is provided by PeopleSoft pluggable encryption technology (PET), which employs 3DES algorithms and 168-bit encryption keys to secure data.

### *Features*

Applying Pluggable Cryptography to your system:

- Improves the system's ability to protect credit card data during transfer and storage.
- Upgrades existing credit card data.
- Protects data during information display.

Once upgraded, the system displays credit card numbers so as to mask them. Before upgrade, the system displayed all digits of a credit card number, whether display-only or editable. The feature modifies the display to show only the last four digits, replacing each preceding digit with an X.

### *Standards*

PeopleTools Pluggable Cryptography complies with the cardholder data protection requirements of the Payment Card Industry (PCI) Security Standards Council and with Visa's Cardholder Information Security Program (CISP). When you enable this feature, credit card numbers for external third-party payers, such as customers or students, are encrypted.

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**Note.** This feature upgrades credit card numbers that are shared with the PeopleSoft Financials or a third-party database; it does not upgrade those stored internally in the CRM database, such as company-owned or employee credit cards.

---

### *See Also*

*PeopleTools 8.52: Security Administration PeopleBook,* "Securing Data with Pluggable Cryptography"

## Understanding Credit Card Verification Number Encryption

To enhance the security of credit card transactions, the CRM system supports the inclusion of verification number in the credit card authorization process. A verification number, also known as a card identification number, card authentication value, or card validation code depending on the card company, is a 3-digit or 4-digit code that is printed on the back or the face of the credit card. The number is associated uniquely to the card account number as well as the physical credit card. For transactional components that support credit card payments, a field is available to capture the verification number of the credit card. When a transaction, paid by credit card, is submitted, the specified credit card information and the verification number are sent to the authorization process.

In compliance with the guidelines recommended by the PCI Security Standards Council regarding sensitive authentication data, the verification number is removed permanently from the database once the authorization process completes (passed or failed). In situations where the card data is accepted but not immediately authorized (for example, future dated orders that are saved in the database and not submitted until the order date is reached), the verification number is stored in an encrypted format and is masked with XXX when displayed in the field until the value is deleted after authorization.

Here are a list of transactional components that support credit card payments and accepts verification number for authorization processing:

- Support Case.

  Credit card transactions are not applicable to HelpDesk and HR HelpDesk cases.

- Order (agent-facing and customer-facing).
  - For canceled orders (which can be orders that are not yet submitted, or expired orders that are canceled by a batch process on a regular basis), their saved verification numbers are deleted from the database.
  - For future dated orders, their verification numbers are stored in the database, and will be removed when the fulfill by date is reached *AND* the orders are submitted.
  - For bulk orders, credit card information (including the verification number) is transferred to their child orders. Upon submission, the verification number is removed from the database and no longer appears on the parent and child orders.
- Agreement.
- Service order.
- Prepaid account.

  Verification number is not supported in non-prepaid accounts.

---

**Note.** Because of its sensitive nature, verification number is not stored or displayed in the section of the Person component where credit card entries are stored, nor it is passed to another system (for example, supply chain system) through integration points.

---

### *Integration Technology*

PeopleSoft CRM uses the Integration Broker messaging technology (SOAP) to perform credit card authorizations with Cybersource (certified third-party vendor).

To facilitate message exchange between the PeopleSoft and Cybersource systems, an application engine program (CYB_SOAP_REQ) is used to transform authorization request and response messages to the appropriate format for the system that receives them.

The system delivers a node called *PSFT_CYB* in Integration Broker as part of the integration setup. This node contains the Cybersource-specific HTTP connector settings for contacting the authorization servers via SOAP as well as message transformation and routing settings.

---

**Note.** This SOAP-based integration uses core Integration Broker functionality that is available in all PeopleTools versions, which ensures backward and forward compatibility without reliance on third-party software support. Because it is a native PeopleTools functionality, it is easier for customers to set up, deploy and maintain.

This integration uses secure SSL (secure sockets layer) encryption.

Customers who use other non-Cybersource third-party vendors for credit card authorizations can also leverage this SOAP solution with few custom modifications. These changes include an updated node definition and routing properties for their vendors, and possibly a new transformation program (or an updated one based on the delivered transformation program) that formats messages circulating between PeopleSoft and their vendors. The underlying Enterprise Components message stubs and transaction triggers remain the same.

---

To avoid the potential issue of storing and displaying sensitive data in the Integration Broker logs and Service Operations Monitor, the log detail setting in the routing definition for the messages is set to *No Logging* as delivered.

#### *General Settings for Credit Card Authorizations with Cybersource*

A system-wide setting is available to make the provision of credit card verification number mandatory for authorization processing. When the setting is enabled, an error message appears if the user fails to enter a verification number when the credit card transaction is being submitted to authorization. In the case of an order, it is put on credit card hold if the verification number is not present.

For security verification purposes, the CRM system requires that the Cybersource user ID, merchant ID and merchant key be provided on the Installation Options page. These fields are included in the SOAP message for security verification during credit card authorization.

See  and Chapter 3, "Setting Up General Options," Setting Up General Options, page 28.

#### *Cybersource SOAP Connectivity*

Refer to the CRM installation guide for more information on how to set up the integration with Cybersource, which includes these high-level steps:

1. Set up the web server with SSL certificate provided by Cybersource and new proxy server setting.

2. Make sure to enter your Cybersource user ID, merchant ID and merchant key information on the Installation Options page.

3. Make sure the *PSFT_CYB* node is set up properly (connector and routing information in particular) and activated.

4. Test the connectivity using the Test Credit Card Interface component.

See PeopleSoft Customer Relationship Management 9.1 Installation Guide

#### *See Also*

*PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Managing Credit Card Payments," Submitting Credit Card Information for Authorization

*PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Managing Orders and Quotes," Managing Billing Information

*PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working With Order Capture Self Service," Managing Shipping, Product, and Payment Options from the Checkout Page

*PeopleSoft Bill Presentment and Account Management 9.1 PeopleBook*, "Managing Accounts and Viewing Bills in the Communications and Energy Industries," Managing Account Balance and Payments

## Implementing Credit Card Encryption

You must perform these tasks to implement the new functionality:

1. Make sure that the PeopleSoft Financials database that you integrate with is set up to support credit card encryption.

2. Secure the credit card component.

   See and Chapter 8, "Setting Up Credit Card Encryption," Securing the Credit Card Component, page 165.

3. Upgrade existing credit card data.

   See PeopleSoft CRM Upgrade documentation, "Complete Database Changes," Encrypting Credit Card Data

   Contact Global Support before attempting to upgrade your data, if you have customized your system in any of the following ways:

   - Added any records containing credit card number fields.
   - Added a credit card number field to any records.
   - Deleted any records found in the grid on the Upgrade Credit Card Numbers component.
   - Deleted a credit card number field from any records found in the grid on the Upgrade Credit Card Numbers component.
   - Customized the credit card encryption processing functionality in any way.
   - Changed whether or how any particular credit card field is encrypted.

4. Change the credit card encryption key.

   See and Chapter 8, "Setting Up Credit Card Encryption," Changing the Credit Card Encryption Key, page 168.

## Securing the Credit Card Component

You must specify the user roles that have access to credit card components.

Securing the components involves these general steps:

1. Add the Credit Card Component menu (CCENCRYPTION_MENU) to the appropriate permission list.

   See and Chapter 8, "Setting Up Credit Card Encryption," Adding CCENCRYPTION_MENU to a Permission List, page 166.

2. Provide security for the new credit card components:

   See and Chapter 8, "Setting Up Credit Card Encryption," Providing Security for Credit Card Components, page 166.

   - FS_CC_UPGRADE
   - FS_CC_CNVRT

3. Provide security to the new portal registries:

   See  and Chapter 8, "Setting Up Credit Card Encryption," Providing Security for the Portal Registries, page 167.

   - CREDIT_CARD_ENCRYPTION (Credit Card Encryption folder)
   - FS_CC_UPGRADE_GBL (Upgrade Credit Card Numbers content registry)
   - FS_CC_CNVRT_GBL (Change Encryption Key content registry)

4. (Optional) Change the security group for the FS_CC_CNVRT Application Engine process definition.

   See  and Chapter 8, "Setting Up Credit Card Encryption," Changing the Security Group (Optional), page 167.

5. Run the portal security synchronization process (PeopleTools, Portal, Portal Security Sync).

6. Clear the application and web server caches.

## Adding CCENCRYPTION_MENU to a Permission List

You must add CCENCRYPTION_MENU to the appropriate permission list. You may want to choose a security administration role.

### *See Also*

*PeopleTools 8.52: Security Administration PeopleBook*, "Setting Up Permission Lists," Managing Permission Lists

## Providing Security for Credit Card Components

To provide access to the new PeopleSoft components:

1. Navigate to PeopleTools, Security, Permissions & Roles, Permission Lists, Pages.

2. Add the menu name CCENCRYPTION_MENU.

3. Click Edit Components.

   The Components page appears.

4. Locate the FS_CC_UPGRADE component to which you want to grant access.

   (By default, no components are authorized when adding a menu.)

5. Click the Edit Pages button for each component to which you want to grant access.

   The Page Permissions page appears.

6. Specify the actions that a user can complete on the page.

7. Click OK on the Page Permissions page, and then again on the Component Permissions page.

**Note.** Perform this procedure twice, once for the FS_CC_UPGRADE component and again for the FS_CC_CNVRT component.

### See Also

*PeopleTools 8.52: Security Administration PeopleBook,* "Setting Up Permission Lists"

## Providing Security for the Portal Registries

You must provide security for the new folder and content registries on the portal.

For *Folder:*

1. Navigate to PeopleTools, Portal, Structure and Content.
2. In the Folders list, click on the links Set Up CRM, then Utilities.
3. Click the Edit link next to the Credit Card Encryption folder name.
4. Click the Folder Security tab.
5. On the Folder Administration page, select the permission lists that you want to have access to the Credit Card Encryption menu.

For *Content Registries:*

1. Navigate to PeopleTools, Portal, Structure and Content.
2. In the Folders list, click on the links Set Up CRM, then Utilities, then Credit Card Encryption.
3. Click the Edit link for Upgrade Credit Card Numbers (FS_CC_UPGRADE_GBL).
4. On the Security tab, make sure the permission list displayed corresponds to the CCENCRYPTION_MENU permission list.
5. Repeat steps 3 and 4 for Change Encryption Key (FS_CC_CNVRT_GBL).

**Note.** When you complete all security tasks, delete your browser cache so that you can view the new portal registries in the menu navigation.

### See Also

*PeopleTools 8.52: PeopleTools Portal Technologies PeopleBook,* "Administering Portals"

## Changing the Security Group (Optional)

You can optionally change the security group for the FS_CC_CNVRT Application Engine process definition.

To change the security group:

- Navigate to PeopleTools, Process Scheduler, Processes.
- Select *Process Name* in the Search By field.
- Enter *FS_CC_CNVRT* in the begins with field.
- Click the Search button.
- On the Process Definition page, select the Process Definition Options tab.
- Modify the security group in the Process Groups grid.

# Changing the Credit Card Encryption Key

This section describes how to:

- Re-encrypt credit card data.
- Change the encryption key.

You can change the credit card encryption key at any time.

## Page Used to Change the Encryption Key

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Credit Card Number Re-Encrypt | FS_CC_CNVRT | Set Up CRM, Utilities, Credit Card Encryption, Change Encryption Key | Change the key used to encrypt credit card numbers. Run the utility to re-encrypt credit card numbers using a new encryption key. |

## Re-Encrypting Credit Card Data

To change the encryption key at any time after the initial conversion, you must first re-encrypt all credit card data.

To re-encrypt credit card data:

1. If this is the first re-encryption following the initial conversion and you have not secured the FS_CC_CNVRT component, complete the steps in the "Securing the Credit Card Components" section in this chapter.

   See  and Chapter 8, "Setting Up Credit Card Encryption," Securing the Credit Card Component, page 165.

   Complete the steps for the FS_CC_CNVRT component only. Securing FS_CC_CNVRT secures both the FS_CC_CNVRT component and the FS_CC_CNVRT portal registry.

2. Navigate to Set Up CRM, Utilities, Credit Card Encryption, Change Encryption Key.

3. Click the *Generate Random Key* button to generate a new random hexadecimal encryption key.

   Clicking this button generates a new, random hexadecimal encryption key. You can modify this key, but you must format it as a 24-byte string in hexadecimal notation. The first two characters must be *0x,* and the remainder must be exactly 48 characters and consist of both numeric digits and the lowercase letters *a* through *f.*

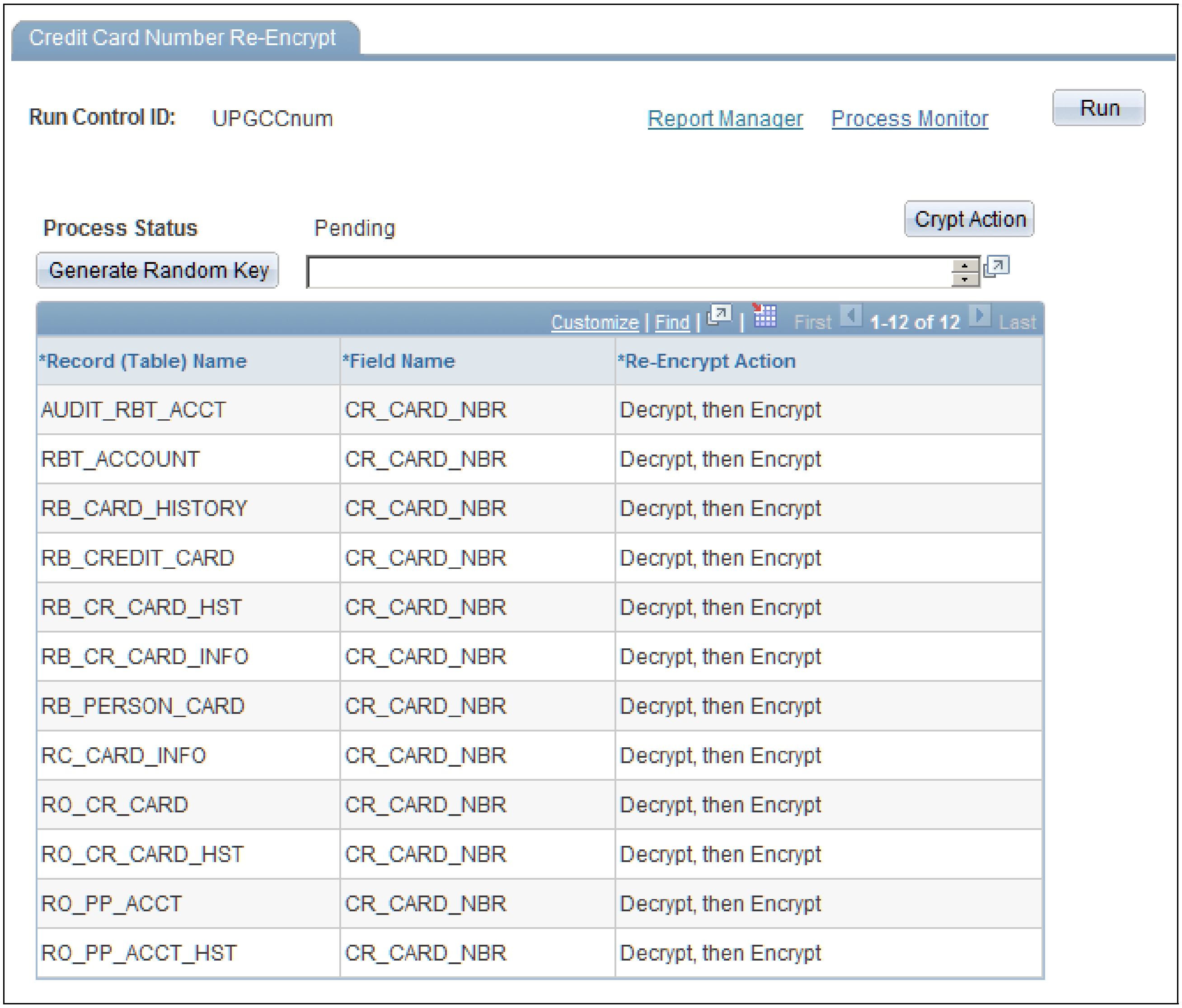
4. If the values in the Re-encrypt Action column are not *Decrypt, then Encrypt,* click the Crypt Action button until *Decrypt, then Encrypt* appears in the column.

5. Click the Run button to start the conversion process.

   The Credit Card Conversion process converts each field in the grid. If the process fails for any reason, you can restart the process; it will resume where it stopped. If you can not restart the process, run it from the beginning. The system will bypass fields that have already been processed.

## Changing the Encryption Key

Access the Credit Card Number Re-Encrypt page (Set Up CRM, Utilities, Credit Card Encryption, Change Encryption Key).


Credit Card Number Re-Encrypt

Run Control ID: UPGCCnum Report Manager Process Monitor Run

Process Status Pending Crypt Action

Generate Random Key

Customize | Find | First 1-12 of 12 Last

| *Record (Table) Name | *Field Name | *Re-Encrypt Action |
|---|---|---|
| AUDIT_RBT_ACCT | CR_CARD_NBR | Decrypt, then Encrypt |
| RBT_ACCOUNT | CR_CARD_NBR | Decrypt, then Encrypt |
| RB_CARD_HISTORY | CR_CARD_NBR | Decrypt, then Encrypt |
| RB_CREDIT_CARD | CR_CARD_NBR | Decrypt, then Encrypt |
| RB_CR_CARD_HST | CR_CARD_NBR | Decrypt, then Encrypt |
| RB_CR_CARD_INFO | CR_CARD_NBR | Decrypt, then Encrypt |
| RB_PERSON_CARD | CR_CARD_NBR | Decrypt, then Encrypt |
| RC_CARD_INFO | CR_CARD_NBR | Decrypt, then Encrypt |
| RO_CR_CARD | CR_CARD_NBR | Decrypt, then Encrypt |
| RO_CR_CARD_HST | CR_CARD_NBR | Decrypt, then Encrypt |
| RO_PP_ACCT | CR_CARD_NBR | Decrypt, then Encrypt |
| RO_PP_ACCT_HST | CR_CARD_NBR | Decrypt, then Encrypt |

Credit Card Number Re-Encrypt page

| | |
|---|---|
| **Crypt Action** | Toggle the value in the Re-Encrypt Action column in the grid. |
| **Generate Random Key** | Generate a random key in the format needed by the encryption algorithms used for credit card encryption and decryption profiles. |
| **(Encryption key)** | If you want to modify the generated key or enter your own, you must format it as a 24-byte hex string. The first two characters must be *0x* and the remainder must be exactly 48 characters that consist of both numeric digits and the lowercase letters *a* through *f.* |
| **Record (Table) Name** | Displays the record name. |
| **Field Name** | Displays the field name. |

**Re-Encrypt Action**

Values include:

- *Decrypt, then Encrypt:* Re-encrypt data currently encrypted with the Pluggable Cryptography credit card encryption profile.
- *No Action:* Indicates that the utility has converted the record. If an error occurs and you rerun the process, records for which No Action is displayed are not reprocessed.

## Synchronizing Re-Encrypted Data With PeopleSoft Financials

Any change in CRM data requires that it be propagated to the PeopleSoft Financials database, which is described in the PeopleSoft PeopleBooks for your software release. Recommended references follow.

### *See Also*

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

*PeopleSoft 9.1 PeopleBook: Integration Interfaces,* "Performing a Full Data Publish of Current Effective Data"

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

*PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Integrating with PeopleSoft Applications," Integrating with PeopleSoft Financial Management Services

## Chapter 9

# Implementing Alternate Character

This chapter provides an overview of alternate character and discusses how to configure the system for alternate character usage.

## Understanding Alternate Character

This section discusses:

- Alternate character functionality.
- Alternate character display.
- Alternate character searches.

### *See Also*

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Company Business Objects"

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Person Business Objects"

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Person Business Objects"

### Alternate Character Functionality

PeopleSoft Customer Relationship Management (PeopleSoft CRM) provides alternate character functionality that supports the need in Japanese and Cantonese (Hong Kong) markets to represent proper nouns phonetically and in their native formats. This functionality enables PeopleSoft CRM to validate double-byte characters in alternate character fields.

To implement alternate character functionality, you must have installed a Japanese- or Cantonese-enabled database and a double-byte-enabled operating system. The alternate character architecture and the related language table architecture enable users to enter data using both single-byte and double-byte character sets and to switch between a base language table and a related language table to view information in either single-byte or double-byte characters.

For example, users who enter data in Japanese require functionality that enables them to enter proper nouns, such as names or addresses, both in kanji and by using a phonetic double-byte character set, such as hiragana. The alternate character architecture also supports phonetic sorting rather than binary sorting on proper nouns for languages that require the use of two-character sets to enter proper nouns.

## Alternate Character Fields

In an alternate character-enabled system, alternate character fields appear in company and person names and addresses.

Labels for alternate character fields differ depending on the component and the field. For example, the Alt Char Name appears in the Company component for entry of the company name in alternate character format. The rules that the system used to determine if alternate character fields appear on pages vary depending on the type of alternate character information that you enter:

- Company name.

  In an alternate character-enabled system, the alternate character field for a company name always appears, whether or not it has a value. This does not depend on the country setting for the company.

- Person name.

  The alternate character field appears on a page only if the country format is Japan or Hong Kong. You cannot view the alternate character field if one of these countries is not selected.

  Pages that display personal name fields usually display them in first name, last name order. For Japanese and most Southeast Asian languages, however, personal name fields appear in the last name, first name order. A space, not a comma, separates the last and first names—the Name field displays the last name[space]first name, not last name,first name.

- Address (for both companies and persons).

  The alternate character fields appear on the Update Address, the Address Book Entry Details and the Quick Create pages. They do not appear on the Address Book list page or on the summary address information that appears on the primary page for a business object.

  See  and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Name and Address Information for Business Objects."

---

**Note.** The alternate character display is determined by the country code that is specified for the business object, not by the country code that is defined as a user preference for the user.

---

## Alternate Character Searches

After you establish alternate character information, you can use the alternate character fields as search criteria in the Business Object search component or the Configurable search.

See  and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Working with Predefined Business Object Search and Quick Create Data."

# Configuring the System for Alternate Character Usage

This section discusses how to:

- Set up alternate characters for language codes.

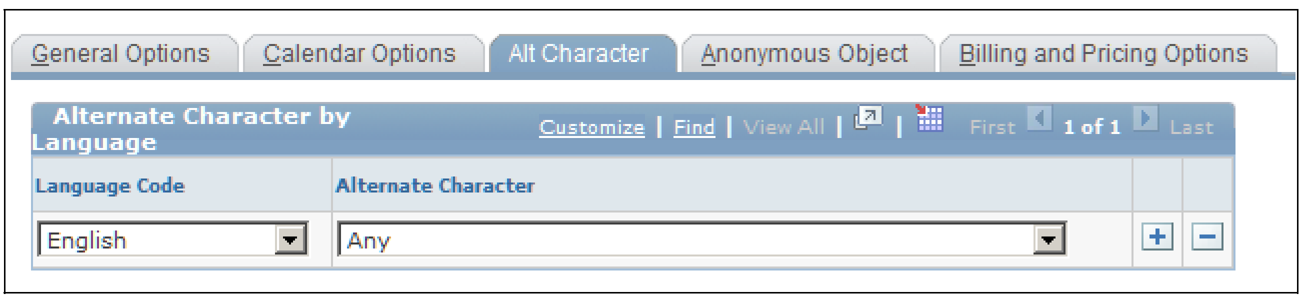
- Enable alternate character functionality for a user.
- Enable business object search to recognize alternate character fields.

## Pages Used to Configure the System for Alternate Character Usage

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Installation Options - Alt Character | ALT_CHAR_PNL | Set Up CRM, Install, Installation Options, Alt Character | Set up the alternate characters that the system uses for a specific language code. |
| User Preferences - Overall Preferences | OPR_DEF_TABLE_RB1 | Set Up CRM, User Preferences, Overall Preferences | Enable alternate character functionality for a user.<br>See  and Chapter 9, "Implementing Alternate Character," page 173. |
| Field | RBQ_FLDDFN | Set Up CRM, Common Definitions, Customers, BO Search, Field, Field | Enable business object searches and quick creates to use alternate characters for a specific field. |

## Setting Up Alternate Characters for Language Codes

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




Installation Options - Alt Character page

**Language Code** Select a language code to which you can assign an alternate character value.

**Alternate Character** Select the character set for the language code. Values are: *Alphanumeric, Alphanumeric with Latin-1 Ext, Any, DB Any Characters (Kanji), Double Byte Hiragana, Double-Byte Katakana,* and *Single Byte Katakana.* The system uses the character set that is assigned to a user's language code to display alternate character-enabled fields to the user.

## Enabling Alternate Character Functionality for a User

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

See  and Chapter 9, "Implementing Alternate Character," page 173. and Chapter 4, "Setting Up Security and User Preferences," Defining Overall Preferences, page 89.

## Enabling Business Object Search to Recognize Alternate Character Fields

Access the Field page (Set Up CRM, Common Definitions, Customers, BO Search, Field, Field).

Select the Is Alternate Character Field field.

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

## Chapter 10

# Setting Up Auditing for Cases and Inbound Email

This chapter provides an overview of audit information and discusses how to set up case auditing.

---

**Important!** PeopleSoft delivers the system with auditing features disabled. Because enabling auditing can negatively impact application performance, you should analyze audit needs carefully and enable auditing only when there is a strong business reason to do so.

---

## Understanding Audit Information

This section discusses:

- History versus auditing.
- The audit record.

### History Versus Auditing

PeopleSoft CRM tracks events that occur in cases and emails using a feature called the Active Analytics Framework. You can view a summary of these tracked events on component history pages. For each tracked event, a corresponding audit trail record stores details of changes and is used to display details of the changes.

Use the following pages to review history information in the Case component and in the Inbound Email component:

- Case History page

  The Case History page lists information about major events in the life of the case, including a description of the event and details of field changes that are associated with the event. You can define case history events using complex conditional statements. For example, you can configure the case history so that changes to a field only appear if the field changes to or from a particular value.

  You set up case history processing using the active analytic framework.

- Email History page

  The Email History page lists email history events that are captured by the active analytic framework. You can use this page to review email event history, routing history, and audit trail information.

Both history pages offer access to a detailed audit trail page that displays record-level changes. You can specify the fields in the record to audit and the types of changes to capture (add, update, display, or delete). You cannot incorporate logic based on the value of the fields; the system captures changes without regard to the data that changes.

### See Also

*PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Processing Cases," Reviewing Case History

*PeopleSoft CRM 9.1 Multichannel Applications PeopleBook*, "Setting Up ERMS System"

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

## The Audit Record

The audit record stores audit trail data. The structure of this record determines the fields that get audited. The audit record for the Case component, RC_CASE_AUDIT, stores information from both support cases and help desk cases. The RB_INEM_AUDIT record stores information for the Search Inbound Emails component (the email workspace).

The audit record consists of these elements:

1. Audit record key fields.

   These fields hold information that is specific to the audit action.

2. The key fields for the records to audit.

   These are alternate key fields in the audit record.

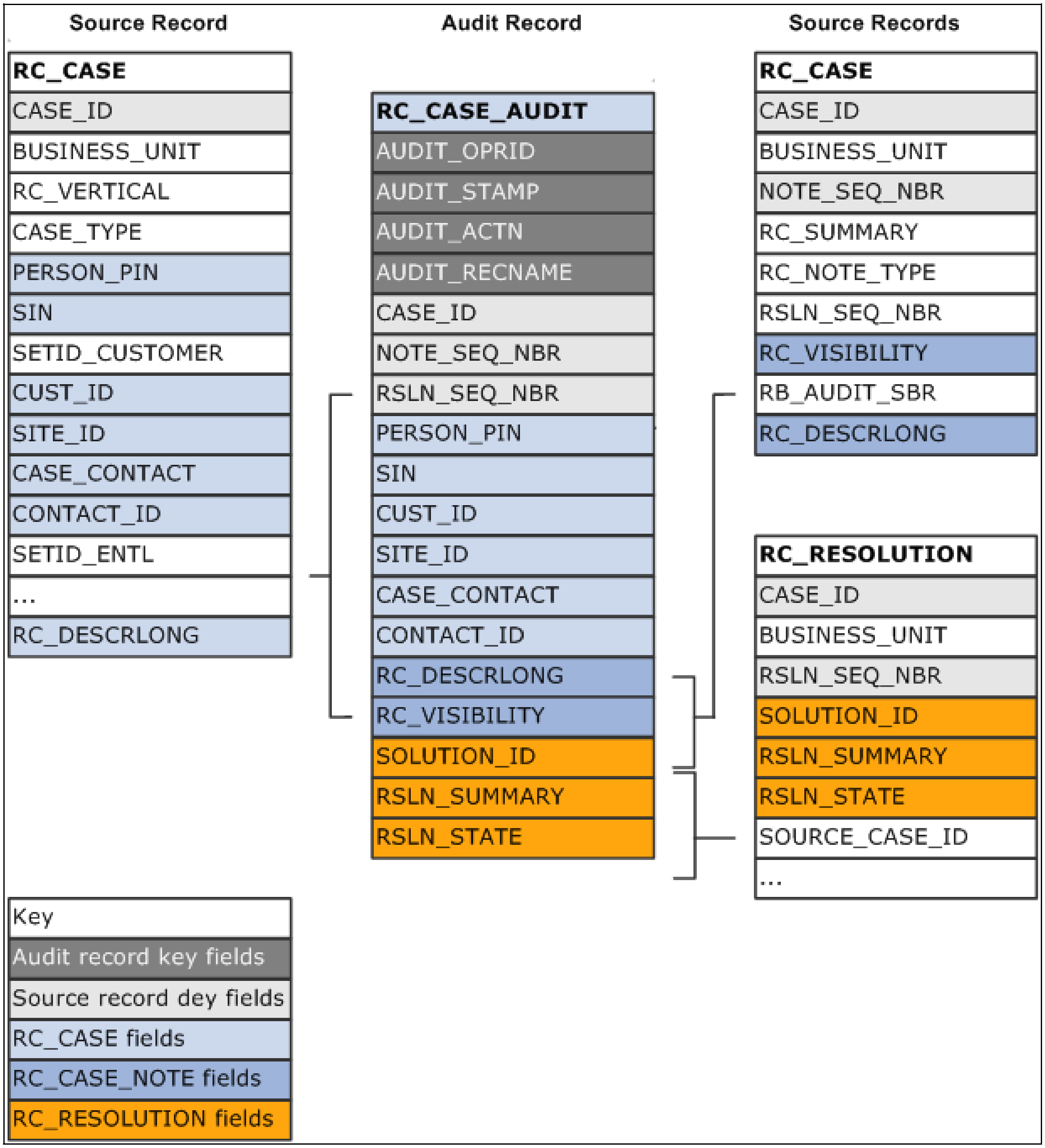
   Cases are based on several records; the audit record includes the key fields for every record that is audited. The BUSINESS_UNIT key field, however, is not on the audit record even though BUSINESS_UNIT is a key to the main case record, RC_CASE, and to each of its child records. This is because case numbers are unique across all business units, and the value in the CASE_ID field is enough to uniquely identify the case.

3. The fields to audit.

   If a field appears in more than one record, changes to both records are audited. For example, the RC_DECSRLONG field appears in both RC_CASE and RC_CASE_NOTE. By including this field in the audit record, you ensure that changes to both the case description and the note description are audited.

This is the audit record architecture for RC_CASE_AUDIT:




Partial case audit record

The left and right columns list the records that are audited, or *source records.* The middle column lists the audit record.

---

**Note.** This diagram is an example only. Use PeopleSoft Application Designer to review the actual record structures for cases.

---

Before you turn on auditing, review the record structure so that you know which fields get audited.

To change the fields that get audited, use PeopleSoft Application Designer to modify the RC_CASE_AUDIT record definition or the RB_INEM_AUDIT record definition.

**Important!** PeopleSoft does not support modifications to the audit record definitions.

# Setting Up Case and Email Auditing

To choose actions to audit, use the Audit - Setup (RC_COMP_AUDIT) component.

This section discusses how to set up case auditing.

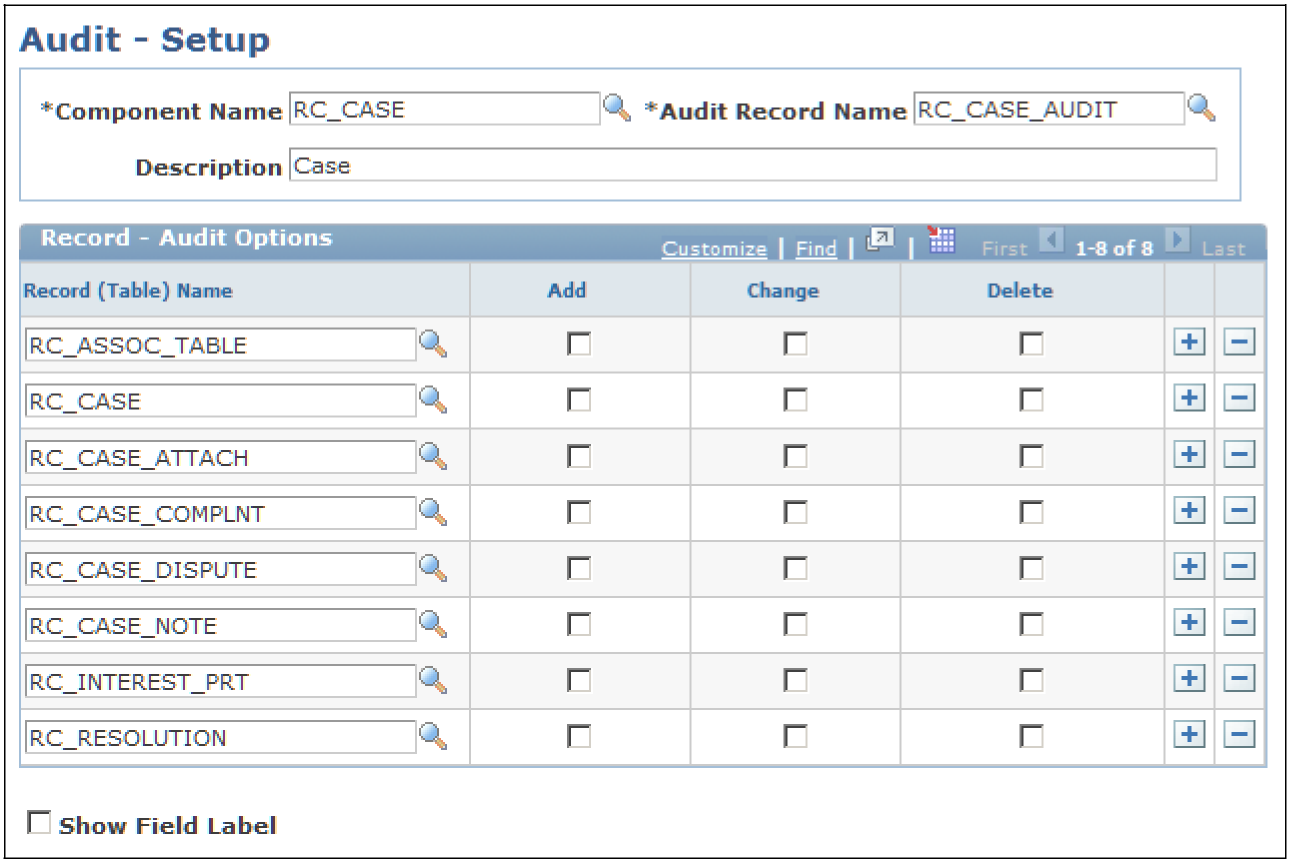
## Page Used to Set Up Case Auditing

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
| --- | --- | --- | --- |
| Audit - Setup | RC_COMP_AUDIT | Set Up CRM, Common Definitions, Audit Trail - Setup, Audit - Setup | Choose which actions (add, change, and delete) to audit. |

## Choosing Actions to Audit

Access the Audit - Setup page (Set Up CRM, Common Definitions, Audit Trail - Setup, Audit - Setup).




Audit - Setup page

**Component Name**

Enter the object name of the component. PeopleSoft delivers entries for RC_CASE (the Case component) and RB_EM_IB (Search Inbound Emails component).

Although you configure auditing at the component level, the processing occurs at the record level. Therefore, when multiple components are based on the same record, the system captures data changes regardless of which component the user was in when making the change. For example, the auditing that you establish for the RC_CASE component is also valid for the self-service case components, which are based on the same records.

**Audit Record Name**

Enter the record where the system stores information about data changes. The structure of this record determines which fields get audited.

### *Record - Audit Options*

The fields in the Record - Audit Options region enable you to select which actions (add, change, and delete) to capture for each record that you audit. The selections apply to all audited fields in the specified record. You cannot set any field-level auditing options; all fields in a record must use the same auditing rules. To set field-level auditing options, you must redefine the audit record using PeopleSoft Application Designer.

When you activate auditing on the Audit Setup page, you turn on auditing only for the fields that are included in the audit record (RC_CASE_AUDIT or RB_INEM_AUDIT—the record that stores the audit trail data.

All auditing is based on differences between the field values at the time that the component is opened and at the time that the component is saved. If a user saves several times while working in a component, each save triggers auditing activity.

**Record (Table) Name**

Enter the record that is associated with the audited component. For example, the Case component includes data from several records.

**Add**

Select to have the system capture the change every time a value is added to a field that is audited. A value is considered as added in two situations:

- When data is in the field the first time that you save a new row of data.

  For example, if you create a new case, the values in all populated fields are considered as added the first that time that you save that case.

- When you save data in a field that was previously null.

**Change**

Select to have the system capture the change every time the value of an audited field is updated. A value is considered updated when a new non-null value is different from the previous non-null value.

**Delete**

Select to have the system capture the change every time the value of an audited field is deleted. A value is considered deleted when a null value replaces a non-null value.

**Show Field Label**

Select to have the runtime audit page display the field labels rather than the field's object name. For example, if you're auditing the RC_PRIORITY field, selecting this option causes the audit page to refer to this field as *Priority* rather than *RC_PRIORITY.*

If this check box is clear, the audit page displays field values. If the audited field has translate values, the translate long value appears.

Chapter 11

# Running Diagnostic Reports

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

- Register diagnostic packages.
- Run diagnostic reports.

## Understanding PeopleSoft CRM Diagnostics

CRM diagnostics consist of seven PeopleSoft application packages, or plug-ins, that can help to troubleshoot the PeopleSoft CRM system setup or integration related problems. When you report a problem to the PeopleSoft Global Services Center, the support representative might ask you to run a diagnostic package to determine how the system is set up.

The delivered diagnostic packages are sufficient to diagnose most system problems. To develop additional diagnostic packages that meet installation-specific needs, use the PeopleTools Application Designer.

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

See *PeopleTools 8.52: PeopleSoft Application Designer Lifecycle Management Guide*

PeopleSoft CRM diagnostic packages produce reports that appear at the workstation or are emailed to you. You can run the following seven diagnostic packages:

| ***Package Name*** | ***Purpose*** |
|---|---|
| DIAG_CMSETUP | Displays information about correspondence management installation and setup:<br>• Merge Server Definition.<br>• Merge Server Printers.<br>• Setup Merge Server.<br>• Install Options.<br>• FTP URL Details for Correspondence Management.<br>• Process Scheduler Server Names for Correspondence Management Jobs.<br>• Process Scheduler Server Details. |

| ***Package Name*** | ***Purpose*** |
|---|---|
| DIAG_COMMSETUP | Displays information about communications setup:<br>• Configuration table.<br>• Churn event setup.<br>• Churn event set setup.<br>• Churn score setup. |
| DIAG_EIPGATEWAYINFO | Queries the connection URL and displays information about multiple gateways, if multiple gateways are set up. |
| DIAG_EIPMESSAGENODES | Displays information about node definition:<br>• Message node name.<br>• Transaction type (InSync, OutSync, InAsync, and OutAsync).<br>• Request message.<br>• Request message version.<br>• Status (active, inactive). |
| DIAG_EIPMESSAGES | Displays information about EIP messages that is sorted by the different application names:<br>• Message node name.<br>• Transaction type (InSync, OutSync, InAsync, and OutAsync).<br>• Request message.<br>• Request message version.<br>• Message handler.<br>• Message handler type.<br>• Status (active, inactive). |
| DIAG_FSISETUP | Displays the following:<br>• Operator, business unit, and setID.<br>• Role code and role name.<br>• Role mapping.<br>• FSI issues setup. |

| ***Package Name*** | ***Purpose*** |
| --- | --- |
| DIAG_SEARCHBUILDSETUP | Displays the following:<br>• Information about the last search build.<br>• Run control information.<br>• Search parameters for CRM_RB_SRCHDB.<br>• Search records.<br>• Search records and fields. |
| DIAG_DATASETRULES | Displays information about Data Set Rules:<br>• Data Set Rules Name.<br>• Status Active.<br>• Search Record.<br>• Rule Condition.<br>• SQL. |
| DDIAG_PRODCATALOG | Displays information about Product Catalog through input prompt of SETID:<br>• List of Products.<br>• Catalog Details.<br>• Product Association.<br>• Product Criteria.<br>• Security Membership.<br>• Featured Products. |
| DIAG_RULEROLE_SETUP | Displays information about Role and Rules Setup through input prompt of Operator ID:<br>• Role.<br>• Role and Rules. |
| DIAG_SALESTERRITORY | Displays information about Sales Territory Info through input prompt of user id:<br>• TREE MANAGER.<br>• TREE MANAGER NODES.<br>• TREE Details.<br>• Territory Details. |

| *Package Name* | *Purpose* |
|---|---|
| DIAG_SALESUSER | Displays information about Sales User details through input prompt of user ID:<br>• SALES USER DETAILS.<br>• SALES USER VISIBILITY DETAILS.<br>• SALES ACCESS PROFILE DETAILS. |

**Note.** Before you can run any of these diagnostic packages, you must register them.

See  and Chapter 11, "Running Diagnostic Reports," Registering Diagnostic Packages, page 186.

# Registering PeopleSoft CRM Diagnostics

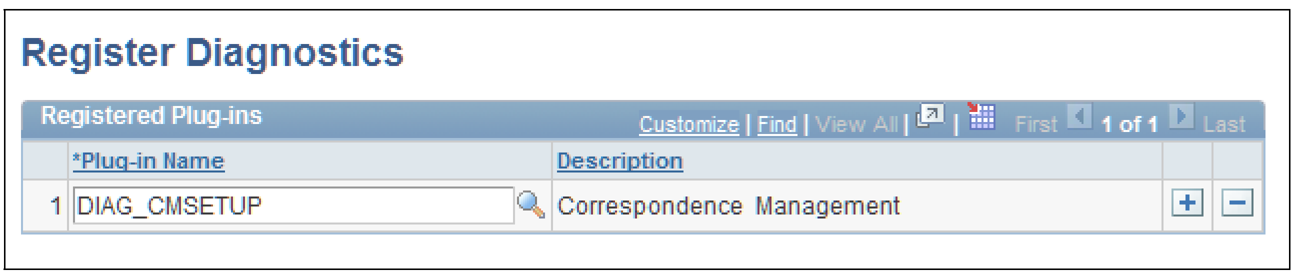
This section discusses how to run PeopleSoft CRM diagnostics.

## Page Used to Register PeopleSoft CRM Diagnostics

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Register Diagnostics | PT_DIAG_FRAME_REG | Application Diagnostics, Register Diagnostics, Register Diagnostics | Register diagnostic packages to run in the PeopleSoft CRM system. |

## Registering Diagnostic Packages

Access the Register Diagnostics page (Application Diagnostics, Register Diagnostics, Register Diagnostics).




Register Diagnostics page

Click the Look Up Plug In Name button and search for a package name that begins with DIAG.

### See Also

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

# Running PeopleSoft CRM Diagnostic Packages

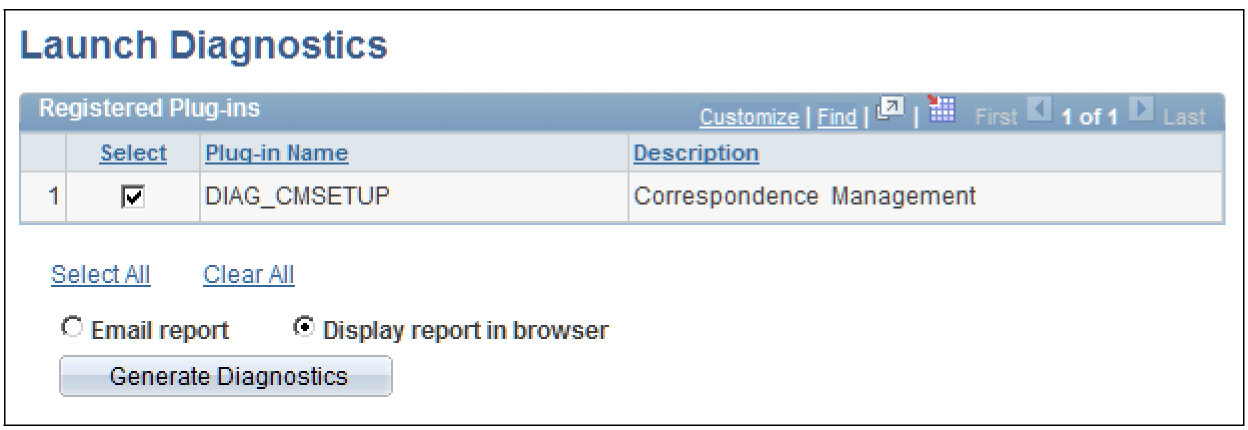
This section describes how to run PeopleSoft CRM diagnostic packages.

## Pages Used to Run PeopleSoft CRM Diagnostic Packages

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Launch Diagnostics | PT_DIAG_PLUGIN | Application Diagnostics, Launch Diagnostics, Launch Diagnostics | Select and run diagnostic packages. |
| PeopleSoft Diagnostics | PT_DIAG_PLUGIN | Select one or more listed plug-ins on the Launch Diagnostics page. Select the Display report in browser option and click the Generate Diagnostics button. | View the diagnostics for the selected plug-ins. |

## Selecting and Running Diagnostic Packages

Access the Launch Diagnostics page (Application Diagnostics, Launch Diagnostics, Launch Diagnostics).



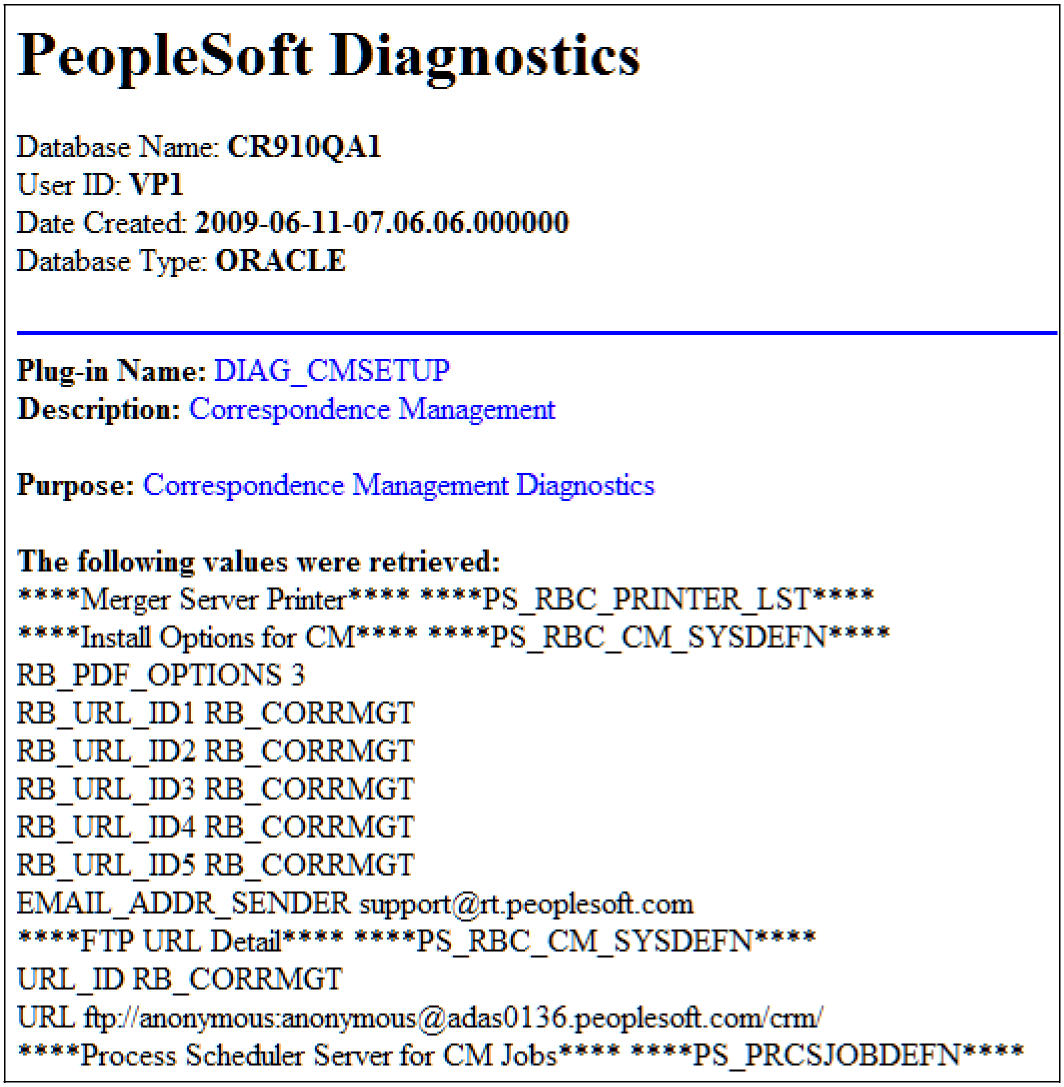

Launch Diagnostics page

Select one or more diagnostic packages to run and click the Generate Diagnostics button.

| | |
|---|---|
| **Email report** | Select to have the report emailed to you |
| **Display report in browser** | Select to have the report appear in a separate popup window. |

## Viewing Diagnostics

Access the PeopleSoft Diagnostics page (Select one or more listed plug-ins on the Launch Diagnostics page. Select the Display report in browser option and click the Generate Diagnostics button).



# PeopleSoft Diagnostics

Database Name: **CR910QA1**
User ID: **VP1**
Date Created: **2009-06-11-07.06.06.000000**
Database Type: **ORACLE**

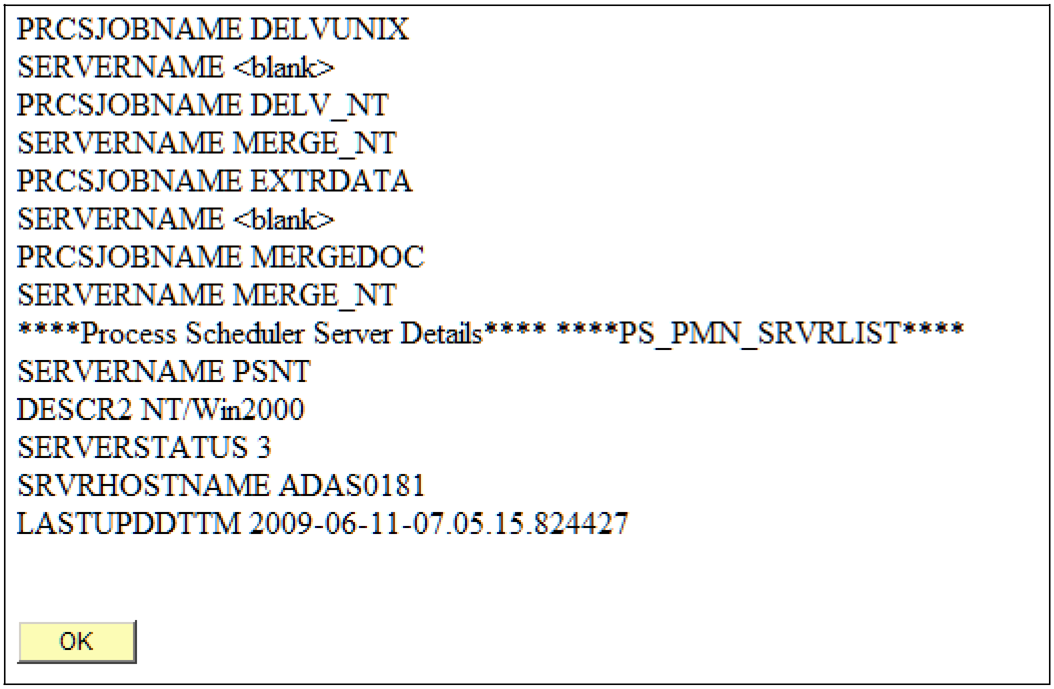
**Plug-in Name:** DIAG_CMSETUP
**Description:** Correspondence Management

**Purpose:** Correspondence Management Diagnostics

**The following values were retrieved:**
****Merger Server Printer**** ****PS_RBC_PRINTER_LST****
****Install Options for CM**** ****PS_RBC_CM_SYSDEFN****
RB_PDF_OPTIONS 3
RB_URL_ID1 RB_CORRMGT
RB_URL_ID2 RB_CORRMGT
RB_URL_ID3 RB_CORRMGT
RB_URL_ID4 RB_CORRMGT
RB_URL_ID5 RB_CORRMGT
EMAIL_ADDR_SENDER support@rt.peoplesoft.com
****FTP URL Detail**** ****PS_RBC_CM_SYSDEFN****
URL_ID RB_CORRMGT
URL ftp://anonymous:anonymous@adas0136.peoplesoft.com/crm/
****Process Scheduler Server for CM Jobs**** ****PS_PRCSJOBDEFN****

PeopleSoft Diagnostics page 1 of 2


PRCSJOBNAME DELVUNIX
SERVERNAME <blank>
PRCSJOBNAME DELV_NT
SERVERNAME MERGE_NT
PRCSJOBNAME EXTRDATA
SERVERNAME <blank>
PRCSJOBNAME MERGEDOC
SERVERNAME MERGE_NT
****Process Scheduler Server Details**** ****PS_PMN_SRVRLIST****
SERVERNAME PSNT
DESCR2 NT/Win2000
SERVERSTATUS 3
SRVRHOSTNAME ADAS0181
LASTUPDDTTM 2009-06-11-07.05.15.824427



PeopleSoft Diagnostics page 2 of 2

## Part 3

# Workforce Management



## Chapter 12

# Setting Up and Maintaining Provider Groups and Group Members

This chapter provides an overview of provider groups and group members and discusses how to:

- Establish cost categories for workers.
- Define provider groups.
- Define schedules for provider groups.
- View team calendars.
- Define group assignment criteria and competencies.

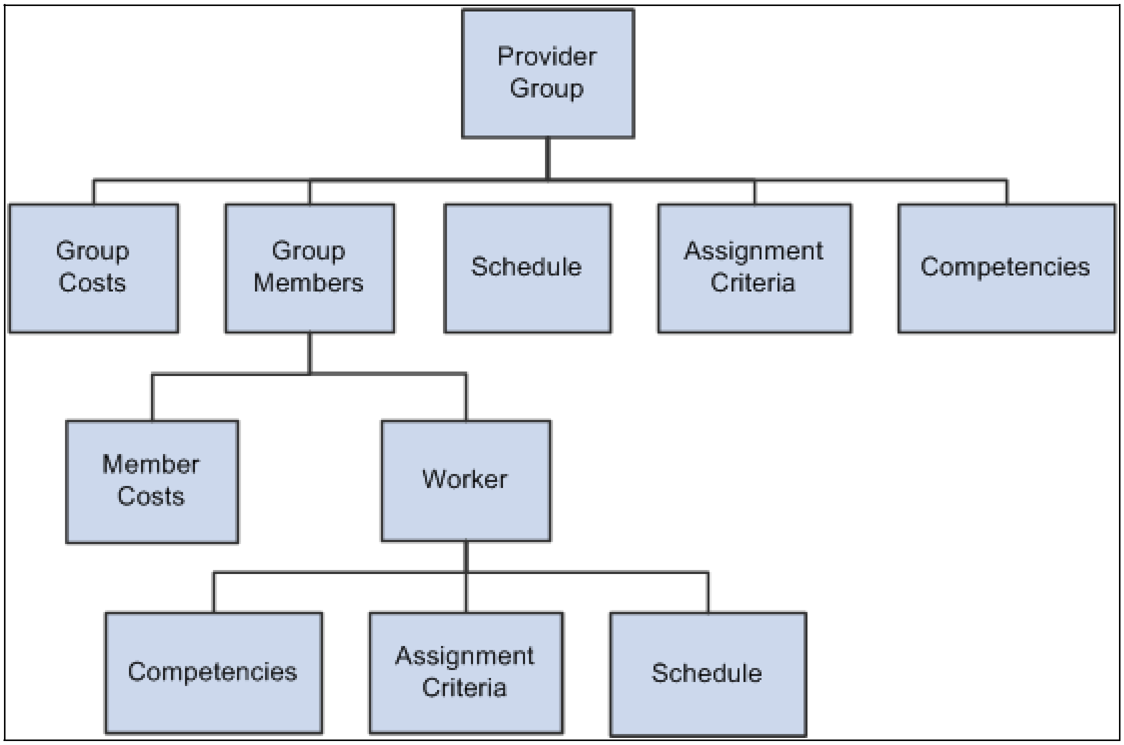
## Understanding Provider Groups and Group Members

Provider groups organize groups of workers that provide the services or support that are offered by an organization. Cases and service orders are assigned first to a provider group and then to a member of a provider group. For cases, you can assign cases directly to provider group members (agents) rather than going through a provider group assignment.

You can create provider groups that represent workers who service or support specific geographic regions, specific products, or specific customers. Provider groups might also represent workers who have specific competencies. Each worker that can be assigned to a service order must belong to at least one active provider group.

### *Provider Group Data Model*

The following diagram illustrates that a provider group definition includes group cost information, group members, an operating schedule, assignment criteria, and competency information:




Provider group data model

Each group member can represent employees or third-party contractors. You can also define cost information for each worker in the group. Workers are defined using the Worker component.

### Default Assignments for Service Orders

Default assignments for provider groups and group members can be automatically populated for service orders based on the related agreement or service. The defaults for an agreement take precedence over the defaults for a service. For on-demand service orders, the default provider group and group member information come from the service definition.

### System-Suggested Assignments for Cases and Service Orders

For both provider groups and workers, you can define competencies and assignment criteria for provider group and group member assignment searches that are performed on a case or service order. The system uses the competency and assignment criteria to evaluate the best candidate for assignment to the case or service order.

To further inform assignment decisions, the system displays current availability status of each provider group or group member on the candidate list. To determine availability for a provider group, the system uses the schedule information—the hours of operations and holidays—that you define for the provider group.

For group members, the system determines availability by using schedule information that is defined on the worker's resource calendar, if it's available, or standard workweek information that is defined for the installation. In addition to availability status, the system also displays the current number of open cases that are assigned to each worker in the list when the assignment search is performed for a case.

### *Automatic Assignments for Cases*

PeopleSoft Customer Relationship Management (PeopleSoft CRM) performs automatic assignment for regular and self-service cases based on the configuration rules that are set up at the call center business unit level. For each type of case (regular and self-service), you can configure separate assignment options for provider groups and group members (agents).

Regardless of the configuration, an existing provider group or group member assignment is never overwritten. For example, if you select a provider group for the case through the system-suggested assignment, the system does not attempt to assign a provider group when you save.

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

### *Automatic Assignments for Service Orders*

Similar to cases, you can enable PeopleSoft CRM to assign service orders automatically at save time by activating the automatic assignment feature at the field service business unit level.

The automatic assignment feature, however, does not overwrite any provider group or group member values that are present on service orders as a result of manual, default, or system-suggested assignment.

If the Candidate must be available check box is selected at the business unit level, the assignment engine only considers provider groups and group members that are available (during the time the service is performed) for the automatic assignment. No automatic assignment will be made if this check box is selected and there is no provider group or technician available.

See  and *PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Creating and Managing Service Orders," Setting Up Automatic Service Order Assignments.

### *See Also*

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Workers"

Chapter 14, "Setting Up and Performing Assignment Searches," page 219

Chapter 26, "Setting Up and Managing Agreements and Warranties," page 479

*PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Setting Up Services"

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

## Establishing Cost Categories for Workers

This section discusses how to define cost categories for workers.

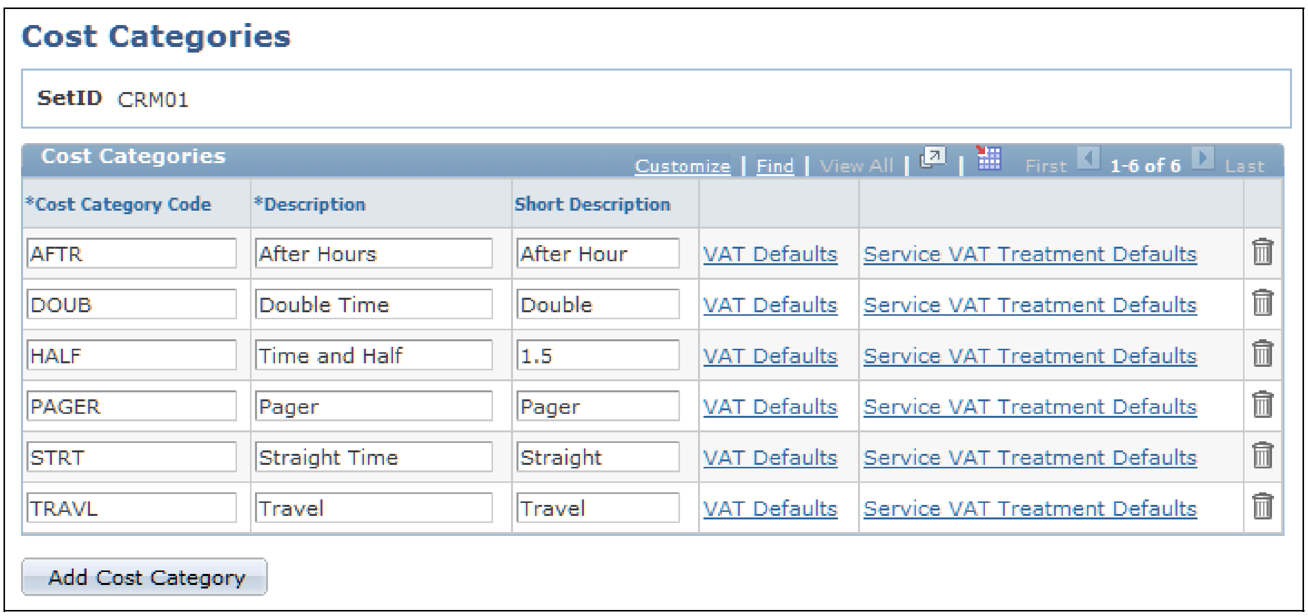
## Page Used to Define Cost Categories

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Cost Categories | RF_COST_CAT | Set Up CRM, Common Definitions, Employee Data, Cost Categories, Cost Categories | Define cost categories to account for the cost of labor time to your company. |

## Defining Cost Categories

To define cost categories, use the Cost Categories (RF_COST_CAT_GBL) component.

Access the Cost Categories page (Set Up CRM, Common Definitions, Employee Data, Cost Categories, Cost Categories).




Cost Categories page

Once you define cost categories, establish an hourly cost rate for each category that provider groups use on the Provider Groups page. Specify cost categories and rates for group members on the Provider Group Member page.

**Cost Category Code**

Enter cost categories to account for the labor costs that the organization incurs; that is, the cost to provide a worker to perform a service for your customers.

| | |
|---|---|
| **VAT Defaults** (value-added tax defaults) | Click to go to the VAT Defaults Setup page in the PeopleSoft Financials/SCM (FSCM) database.<br>Use the page to specify a value for all the required fields, for any fields that require an overall default at the top of the VAT default hierarchy, or for any fields that require an exception to the value specified for a VAT driver higher up in the VAT default hierarchy. You can insert rows for any or all of the VAT driver keys, as well as the VAT country or state. You can also delete existing rows |
| **Service VAT Treatment Defaults** | Click to access the Service VAT Treatment Defaults Setup page in the PeopleSoft Financials/SCM (FSCM) database. Use this page to enter VAT defaulting information for service VAT treatment. |

---

**Note.** VAT is an acronym for value-added tax. Under many different names, VAT is in use in over 130 countries around the world. VAT is a governmental sales tax, a straight percentage that is added to the cost of a good or service. VAT can be inclusive (included in the price of a good or service), or exclusive (added to the price of a good or service).

The VAT-related links on this page appear if the Field Service option to send billing information to Contracts has been selected as part of the installation options.

---

### See Also

*PeopleSoft Global Options and Reports 9.1 PeopleBook*, "Working with Value Added Taxes (VAT)"

# Defining Provider Groups

To define provider groups, use the Provider Group (PF_PROVIDER _GRP) and Provider Group Member (RF_GRP_MEMBER) components. To load data into these tables for these components, you can also use the RF_PROVIDER _GRP_SCI and RF_GRP_MEMBER_CI component interfaces.

This section lists prerequisites and common elements, and discusses how to:

- Define provider groups.
- Define provider group members.

## Prerequisites

Before you define provider groups, you must:

- Define workers by using the Worker component.
- (Optional) Define cost categories.

### See Also

Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," Establishing Cost Categories for Workers, page 195

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Workers"

## Common Elements Used in This Section

**Hourly Rate** and **Currency Code**: Enter the cost to your company for one hour of labor time that is charged to this cost category, and the currency that you use for the cost.

**Multiplier**: Enter a numeric value to generate an hourly billing rate that is based on the hourly rate.

**Billable Rate**: Displays the value that is calculated at save time or the next server trip that reflects the hourly billing rate, which is based on the following formula:

(Billable Rate) = (Hourly Rate) * (Multiplier)

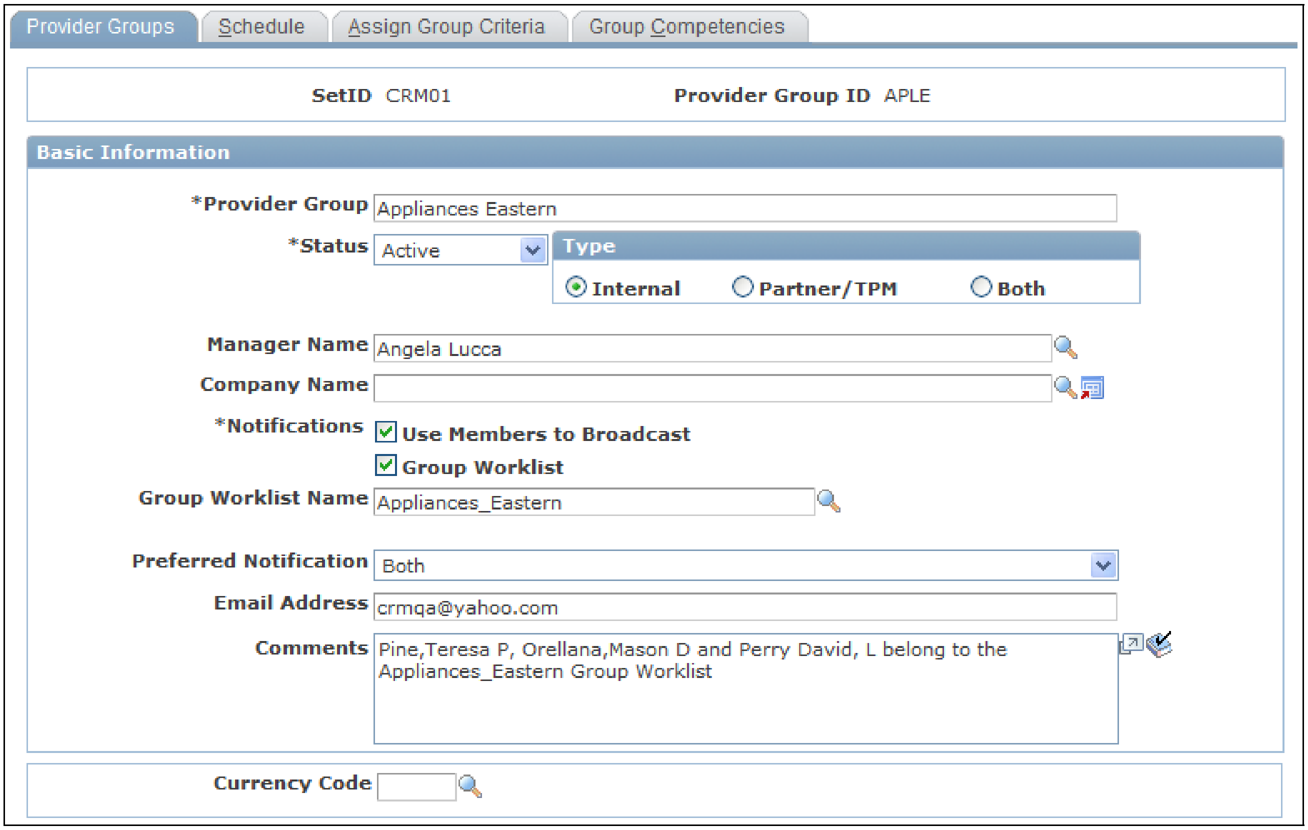
## Pages Used to Define Provider Groups

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
| --- | --- | --- | --- |
| Provider Groups | RF_PROVIDER_GRP | Workforce, Provider Groups, Provider Groups | Define and maintain the groups of people who perform service or support activities. |
| Provider Group Member | RF_GRP_MEMBER | • Workforce, Provider Group Members, Provider Group Member<br>• Click the Details button on the Provider Groups page. | Define the people who are associated with a provider group. |

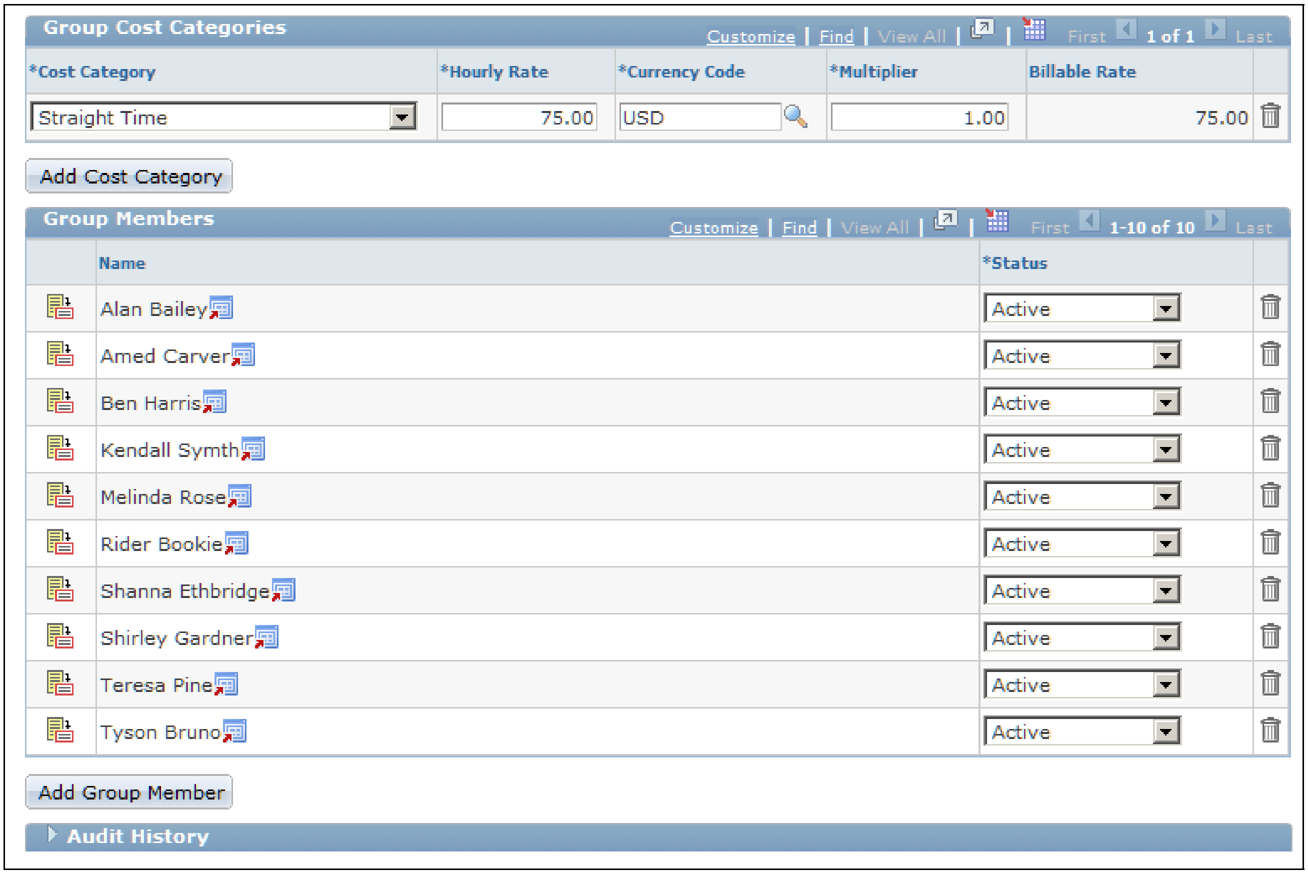
## Defining Provider Groups

Access the Provider Groups page (Workforce, Provider Groups, Provider Groups).




Provider Groups page (1 of 2)




Provider Groups page (2 of 2)

### *Basic Information*

**Status**

Select the current status of the provider group: *Active* or *Inactive.*

The system excludes all inactive provider groups from system prompt lists; therefore, you can't assign them to service orders and cases. Also, you can't change the status of a provider group to *Inactive* if any of its group members is currently assigned to an open service order or case.

---

**Note.** When you change the status of a provider group to *Inactive,* the status of all its members changes to inactive automatically and can't be modified unless you set the provider group status to *Active* again. To activate group members, you must manually change the status of each group member to *Active.*

If you change the status of a group member to *Inactive* by using the Worker component, the group member automatically becomes inactive in the associated provider group.

---

**Type**

For informational purposes, the Type defines whether members of the provider group are internal employees, partner or third-party maintainer (TPM) employees, or both.

**Manager Name**

Enter the user who manages the provider group.

The system uses this value to filter cases for display on the Manager Dashboard. When a user accesses the Manager Dashboard to view case backlogs as well as cases that are at risk of exceeding SLAs, the system first identifies the manager that is selected in respective personalization pages of these dashboard pagelets for this user. With this information, it displays case information pertaining to provider groups that are managed by the selected manager.

**Company Name**

Select the company that is associated with the provider group. When a provider group represents staff from a third-party contractor, use this field to define a name for the third-party company. Click the Transfer to Company button to access the Company component and define an additional company.

**Notifications**

The system uses the notification routing preferences that are associated with the group member's user ID to publish workflow notifications about service order assignment changes that affect the group member. Routing preferences are defined for the group member's user profile on the Workflow page of the User Profiles component under PeopleTools, Security.

**Use Members to Broadcast**

Select to send all automated notifications (that are sent to the group) to each member's individual worklist instead of to the group worklist. The system never broadcasts manual notifications, regardless of whether this check box is selected.

**Group Worklist** and **Group Worklist Name**

Select the check box and the name of the group worklist that is associated with the provider group. Worklists are established on the Group Worklist page. As group membership changes, update permissions for the group worklist as necessary.

**Preferred Notification**

Select the preferred way of receiving notification: *Email, Worklist,* or *Both.*

**Email Address**

Enter the email address that is used to send notifications to the provider group.

**Currency Code**

Select the currency that is used to determine labor costs for the work that provider group members perform. The selected currency becomes the default for new rows in the Group Cost Categories grid. Currency codes are established on the Currency Code page.

### *Group Cost Categories*

The Group Cost Categories grid reflects the costs per hour and corresponding billable rates for the members of the provider group.

**Cost Category**

Select the code of the cost category that is used to account for the labor time of members in the provider group. Cost category codes are defined on the Cost Categories page.

**Hourly Rate, Currency Code, Multiplier,** and **Billable rate**

Use these field to establish the rate, currency, and multiplier by which you want to bill a customer for the selected cost category for the group of members. When you save the page, the system multiplies the hourly rate by the value in the Multiplier field to calculate the billable rate.

See  and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Workers," Setting Up Cost Categories.

#### *Group Members*

Click the Details button to access the Provider Group Member page, where you can view or modify the group member record.

**Name**

Displays the name (first name followed by last name) of the group member. Before you can add a new person to the group, the person must be defined using the pages in the Worker component. Click the Transfer to Worker button that is next to this field to access the Worker component.

---

**Note.** You can also define members of the provider group on the Provider Group Member page.

---

**Status**

Select the person's current status as a member of this provider group: *Active* or *Inactive.*

The system excludes all inactive group members from system prompt lists, so you can't assign them to service orders and cases. You cannot change the status of a group member to *Inactive* if an open service order is assigned to the group member. Similarly, you cannot delete a group member if an open service order is assigned to him or her.

#### *See Also*

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Workers"

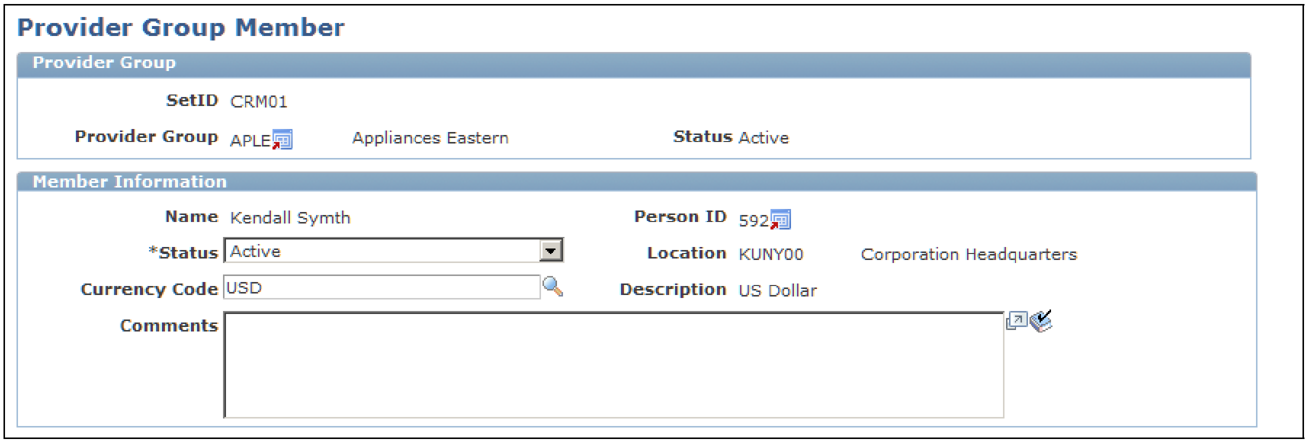
Chapter 5, "Working with Notes and Attachments," page 137

*PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Working with Services Operational Dashboards"

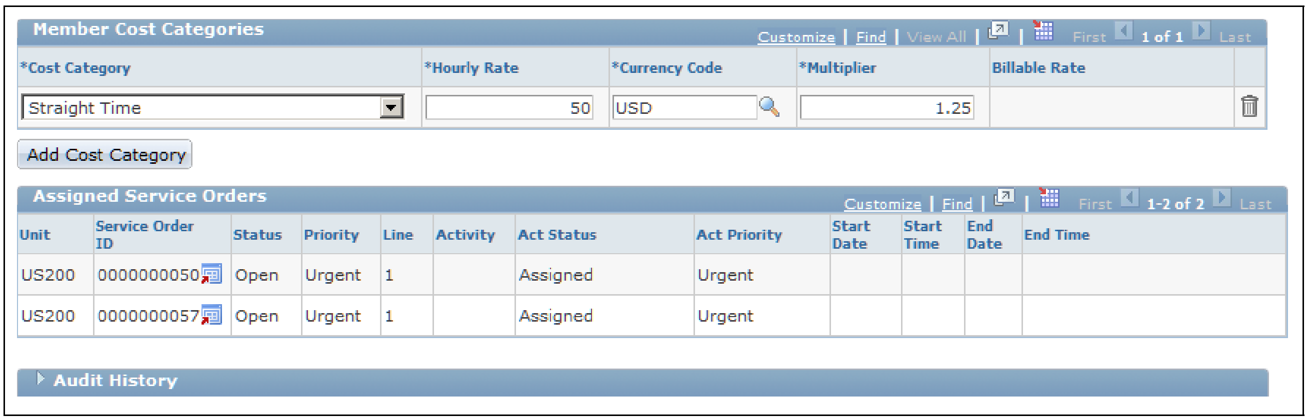
## Defining Provider Group Members

Access the Provider Group Member page (Workforce, Provider Group Members, Provider Group Member).




Provider Group Member page (1 of 2)




Provider Group Member page (1 of 2)

To view details about the selected provider group, click the Transfer to Provider Group button that is next to the provider group ID to access the Provider Group page.

### *Member Information*

**Name**

Displays the name of the group member that you enter when adding the record.

**Note.** You can also define members of the provider group on the Provider Group page.

**Currency Code**

Select the currency that you use to determine the labor costs for the work that the group member provides. The selected currency becomes the default for new rows in the Member Cost Categories group box. Currency codes are established on the Currency Code page.

### *Member Cost Categories*

The Member Cost Categories group box reflects the costs per hour and corresponding billable rates for the member.

| | |
|---|---|
| **Cost Category** | Select the code of the cost category that you use to account for the labor time of the group member. Define cost category codes on the Cost Categories page. |
| **Hourly Rate, Currency Code, Multiplier,** and **Billable rate** | Use these field to establish the rate, currency, and multiplier by which you want to bill a customer for the selected cost category for the member. When you save the page, the system multiplies the hourly rate by the value in the Multiplier field to calculate the billable rate. |

### *Assigned Service Orders*

Use this section to view service order assignments for the group member. The system displays this grid only if the user has at least one assigned service order. Similarly for cases, the system displays the Assigned Cases grid only if the user has one or more assigned cases.

| | |
|---|---|
| **Unit** | Displays the PeopleSoft Integrated FieldService business unit where the service order originated. |
| **Service Order** | Displays the number of the service order that is assigned to the group member. Click the Transfer to Service Order button to access that service order. |

### *Assigned Cases*

Use this section to view case assignments for the group member.

| | |
|---|---|
| **Unit** | Displays the PeopleSoft Support, HelpDesk, or HelpDesk for Human Resources. business unit where the case originated. |
| **Case ID** | Displays the number of the case that is assigned to the group member. Click the Transfer to Case button to access that case. |

### *See Also*

*PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Setting Up Services"

*PeopleTools 8.52: Security Administration PeopleBook*

# Defining Schedules for Provider Groups

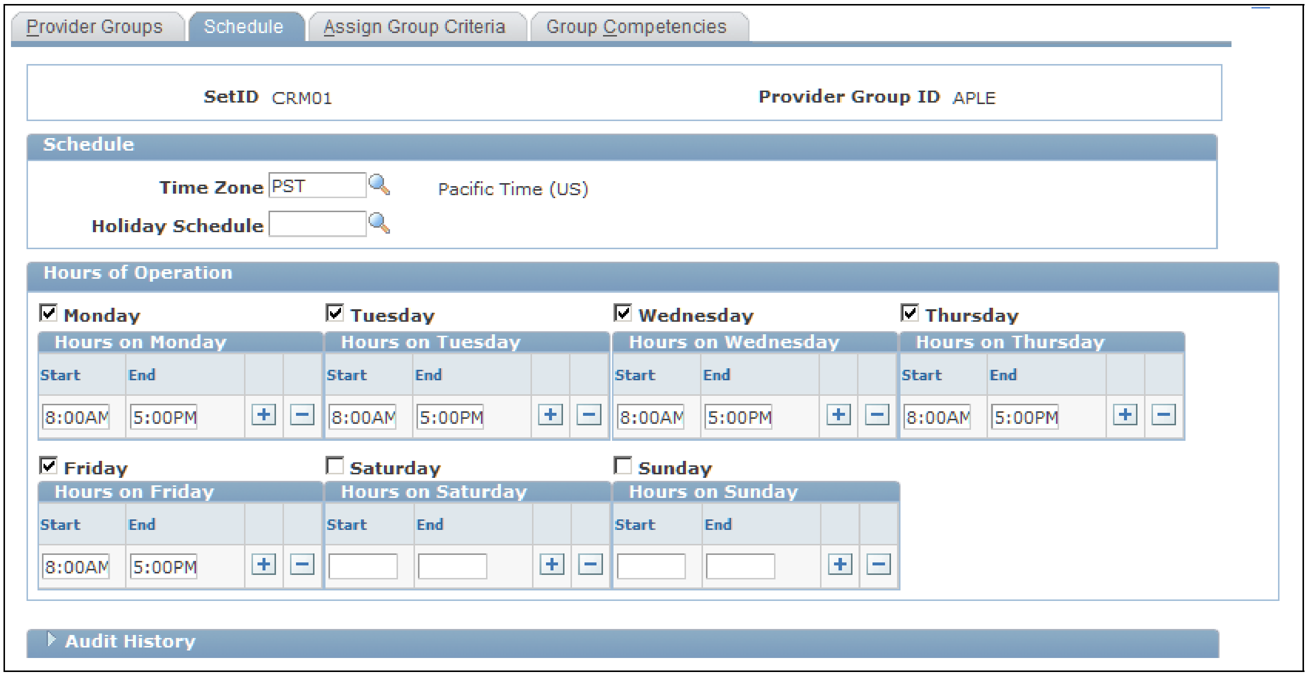
Schedule information determines when the provider group is available for assignment.

## Page Used to Define Schedules for Provider Groups

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Schedule | RF_PROVGRP_TIME | Workforce, Provider Groups, Schedule | Define the hours of operation for a specific provider group. |

## Defining Schedules

Access the Schedule page (Workforce, Provider Groups, Schedule).




Schedule page

To define hours of operation for a provider group:

1. Specify the appropriate time zone.

   The time periods that you define in Hours of Operation group box appear in the time zone that you select.

2. Specify the appropriate holiday schedule, if applicable.

   If the date that an assignment search is performed corresponds to a holiday for a provider group, the system indicates that the provider group is unavailable for assignment. Define holiday schedules by using the Holiday Schedule page under Set Up CRM, Common Definitions, Calendars and Schedules.

   ---

   **Note.** You can update workers' calendars with specified holiday schedules by running the Load Holiday process (RF_HOLIDAY).

   ---

3. Select the days of the week that the provider group is open for business transactions.

   If the date that an assignment search is performed corresponds to a day that a provider group is not open for business transactions, the system indicates that the provider group is unavailable for assignment.

4. For each day of the week, specify the hours of operation.

   Enter start and end times for each work period in the day. You can enter multiple work periods to represent lunch breaks, shifts, and so forth. Establish default values for this page on the Installation - Calendar Options page under Set Up CRM, Install, Installation Options.

### *See Also*

Chapter 14, "Setting Up and Performing Assignment Searches," page 219

Chapter 15, "Defining Holiday Schedules," Associating Workers with Holiday Schedules, page 254

Chapter 15, "Defining Holiday Schedules," Updating Workers' Calendars with Specified Holiday Schedules, page 254

# Defining Group Assignment Criteria and Competencies

This section discusses how to:

- Define assignment criteria.
- Associate competencies with provider groups.

## Pages Used to Define Group Assignment Criteria and Competencies

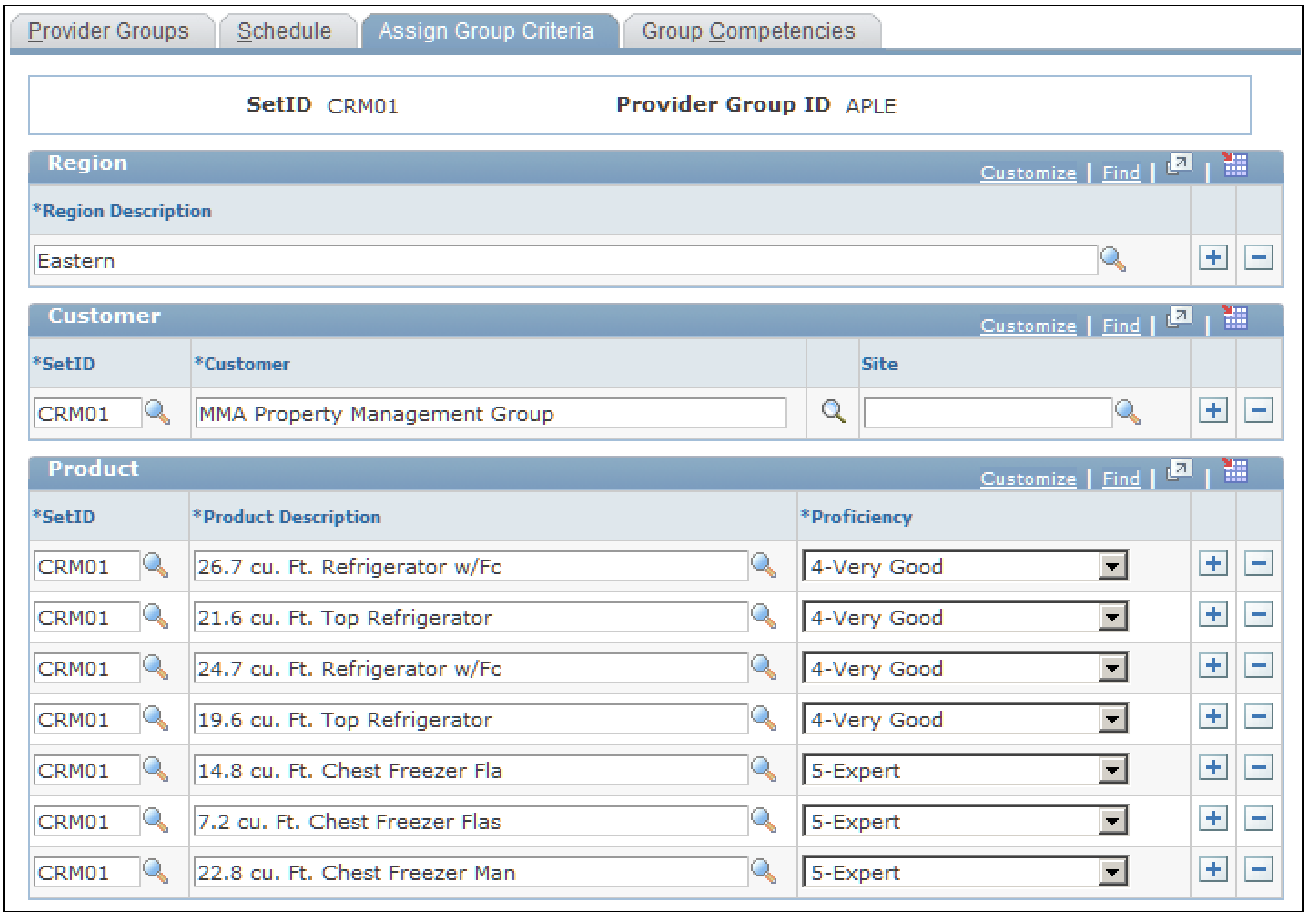
| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Assign Group Criteria | RF_PRV_GRP_CRIT | Workforce, Provider Groups, Assign Group Criteria | Define the criteria that you use to match a provider group to a case or service order. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Group Competencies | RF_PRVGRP_COMP | Workforce, Provider Groups, Group Competencies | Associate a provider group with a list of competencies and define the provider group's level of proficiency for each competency. |

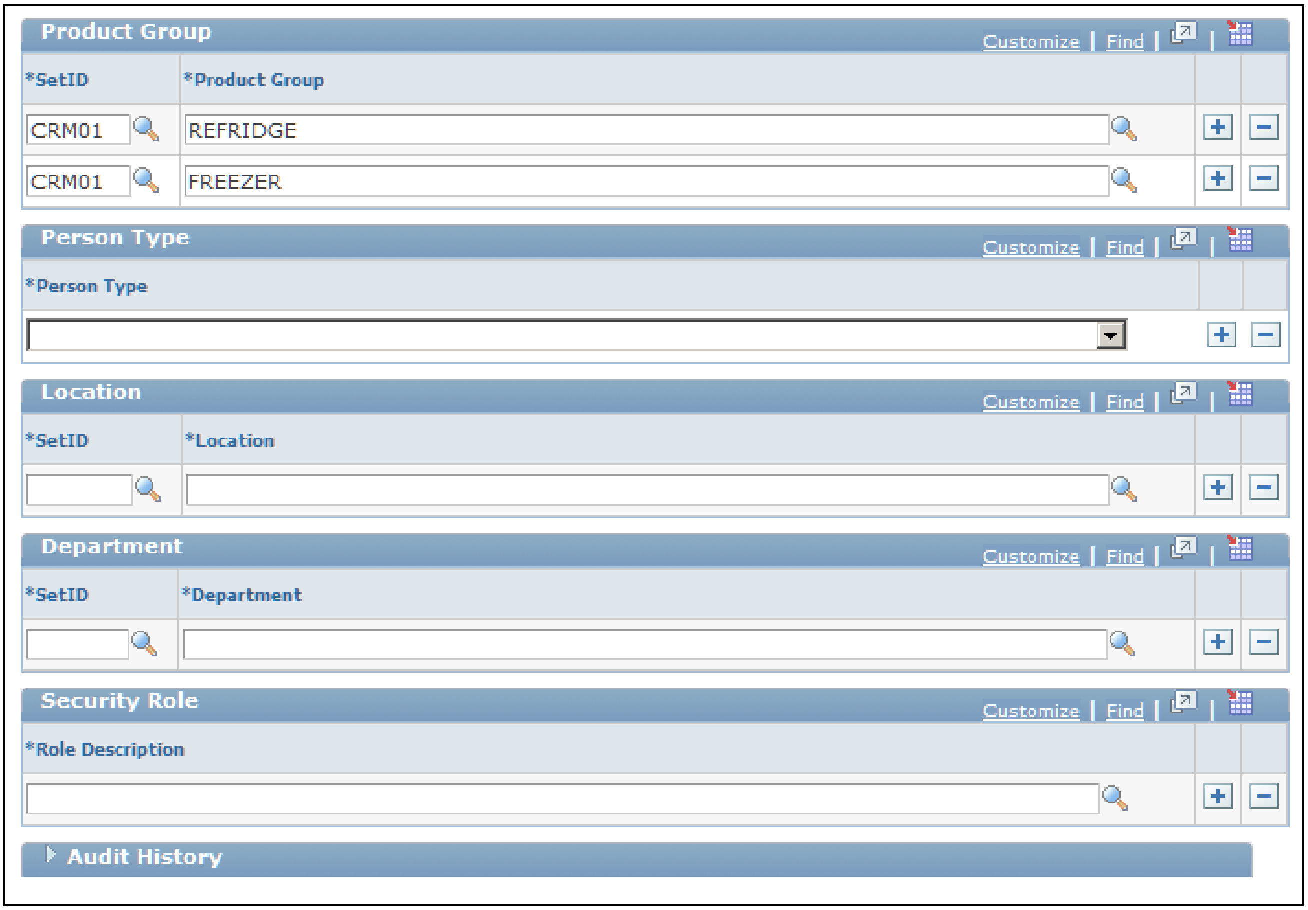
## Defining Assignment Criteria

Access the Assign Group Criteria page (Workforce, Provider Groups, Assign Group Criteria).




Assign Group Criteria page (1 of 2)




Assign Group Criteria page (2 of 2)

When an assignment search is performed from a case or service order, the assignment engine calculates a point value for each criteria value on the service order or case that the provider group matches, based on the weight, or relative importance of the match. The sum of the point values becomes the provider group's fit score. Failure to match a criterion does not exclude the provider group from the list of suggested assignment candidates, but it lowers the provider group's total fit score.

For help desk cases, the assignment engine matches values for department, location, product, and product group. For service orders and support cases, the assignment engine matches values for customer, site, region, product, and product group. For Service Center for Higher Education cases, the assignment engine can match values on a combination of these parameters.

Enter each region, customer, product, product group, location, department, and role that the provider group supports.

### *Region*

Region information can be derived from information that is on the service order or case. At least one region is required.

### *Customer*

If the provider group can support a customer at any site, enter the customer and leave the Site field blank. You can also select a site without specifying a customer.

### *Product*

Enter the setID and the name of the product and the group's proficiency level for supporting the product. Available values for the Proficiency field depend on the product rating model that you specify for the setID on the Assignment Setup page of the Assignment Engine Setup component under Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors.

### *Product Group*

Enter the product group that the provider group supports.

### *Person Type*

Select the person type that the provider group supports. IT and HR Help Desk use the person type of the person on the case to assign provider groups and agents to cases based on the person's relationship to the organization. The available person types are *Contingent Worker,Employee,* and *Person of Interest*; . When assigning HR Help Desk cases, the Person of Interest person type is not considered.

### *Location*

Enter the location that the provider group supports.

### *Department*

Enter the department that the provider group supports.

### *Security Role*

Enter the role that the provider group supports.

---

**Note.** Change management is the only product that uses role criteria for assignments.

---

### *See Also*

Chapter 14, "Setting Up and Performing Assignment Searches," page 219

*PeopleSoft CRM 9.1 Product and Item Management PeopleBook,* "Setting Up Products"

## Associating Competencies with Provider Groups

Access the Group Competencies page (Workforce, Provider Groups, Group Competencies).


Group Competencies page

PeopleSoft Integrated FieldService can evaluate which provider group is best qualified for assignment to a service order by comparing provider group competency and proficiency with the competency and proficiency that is required for a service or service activity on a service order.

Similarly, in PeopleSoft Support and PeopleSoft HelpDesk, the system can evaluate which provider group is qualified for assignment to a case by matching the competency and proficiency that you specify on the case in the Problem Type field with the competency that is defined for the provider group.

### Assigned Competencies

| | |
|---|---|
| **Description** | Select a competency. Establish competencies on the Competencies page of the Competencies component under Set Up CRM, Common Definitions, Competencies. |
| **Proficiency** | Select the provider group's level of expertise for the competency. The rating model that you define for the competency on the Competencies page determines the available proficiency values. In PeopleSoft Integrated FieldService, PeopleSoft Support and PeopleSoft HelpDesk, the system checks a provider group's proficiency level to determine whether the provider group is qualified to perform work on a service order or case that requires the competency. |

### See Also

Chapter 14, "Setting Up and Performing Assignment Searches," page 219

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Workers"

*PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Setting Up Products"

## Chapter 13

# Managing Workforce Competencies

This chapter provides an overview of competencies in PeopleSoft Customer Relationship Management (PeopleSoft CRM) and discusses how to set up competency information.

## Understanding Competencies in PeopleSoft CRM

This section discusses:

- Competencies.
- Competency integrations.

***See Also***

Chapter 14, "Setting Up and Performing Assignment Searches," page 219

*PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Setting Up Products"

*PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Setting Up Services"

Chapter 3, "Setting Up General Options," Setting Up PeopleSoft CRM Application Installation Options, page 27

*PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*

### Competencies

In PeopleSoft CRM, competencies define the skills of the workforce. You can associate a set of competencies with provider groups and workers and define the competency proficiency level for each provider group and worker.

In PeopleSoft Integrated FieldService, define competency requirements for the services that the company provides, and the minimum level of competency proficiency that is required to perform a service or service activity.

Similarly, in PeopleSoft call center applications, you set up minimum competency proficiency requirements for the problem type, category, type or detail information that are used for case assignment. By comparing the competency requirements with the competencies that you define for your workforce, the system can generate a list of qualified candidates to assign to a case.

You can enter competencies and competency proficiency ratings by using components within PeopleSoft CRM or by integration with PeopleSoft Human Capital Management (PeopleSoft HCM) or a third-party human resource management system.

## Competency Integrations

These are the enterprise integration points (EIPs) that update CRM competencies with HCM competencies.

### *Person Competency*

This EIP synchronizes system tables with competency information that you define in an HR system. The Person Competency EIP includes two application messages: PERSON_COMPETENCY_FULLSYNC and PERSON_COMPETENCY_SYNC.

At initial implementation, the HCM publishes a full set of competency records to PeopleSoft CRM by using the PERSON_COMPETENCY_FULLSYNC application message. When a user adds or modifies competency definitions in the HR system after the initial full synchronization, each change is published to PeopleSoft CRM by using the PERSON_COMPETENCY_SYNC application message.

---

***Warning!*** A FULLSYNC overwrites any changes that you made to competency information in CRM.

---

### *Rating Model*

The RATING_MODEL_FULLSYNC and RATING_MODEL_SYNC messages are used to initially load rating models from an HR system and to update competency rating models, respectively.

### *Competency*

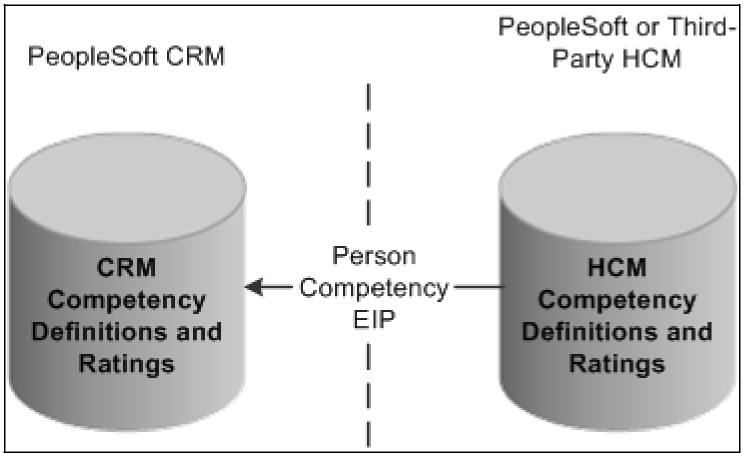
The COMPETENCY_SYNC and COMPETENCY_FULLSYNC messages are used to initially load rating models from an HR system and to update competency rating models, respectively.

### *Flow of Integration*

PeopleSoft CRM is a subscriber to competency EIP messages, not a publisher. Any changes that you make to competency definitions or ratings in PeopleSoft CRM are not published or synchronized with the HCM system.

Make all updates to competency records in your HCM system and publish them to PeopleSoft CRM, as the following diagram illustrates:




Flow of competency information from HCM to CRM

### See Also

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

## Setting Up Competency Information in PeopleSoft CRM

To define competency information, use the Review Rating (CM_REVW_RATING), Competency Type (CM_TYPE_TABLE), and Competency (COMPETENCY_TBL) components.

If you do not synchronize competency information with another system by using the Person Competency EIP, you can manually define competency rating models, competencies, and the competency proficiency for workers by using components in PeopleSoft CRM.

This section discusses how to:

- Define competency rating models.
- (Optional) Define competency types.
- Define competencies.
- Define competency proficiency levels.
- Define minimum competency requirements for service orders and cases.

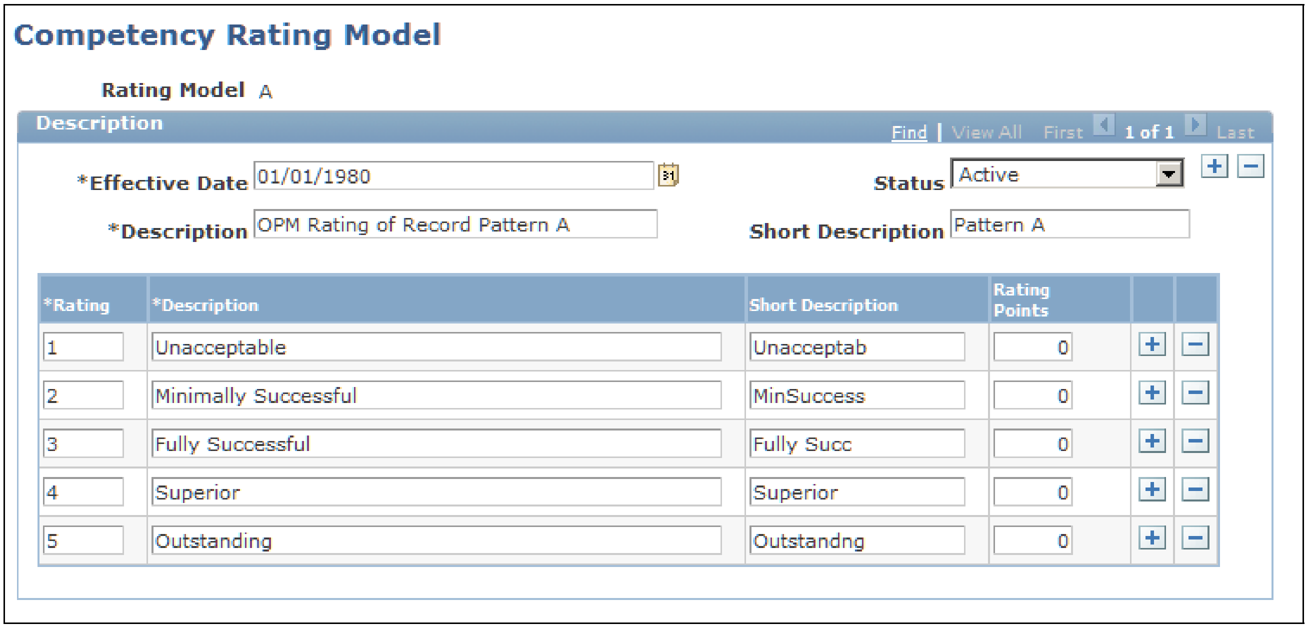
## Pages Used to Set Up Competency Information in PeopleSoft CRM

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Competency Rating Model | CM_REVW_RATING_TBL | Set Up CRM, Common Definitions, Competencies, Competency Rating Model, Competency Rating Model | Define codes that you want to use to indicate a provider group or worker's level of proficiency for a competency that is required to perform a service or support a product. |
| Competency Types | CM_TYPE_TABLE | Set Up CRM, Common Definitions, Competencies, Competency Types, Competency Types | Define competency types, broad categories of competencies that are relevant to particular positions or projects. When you define a competency, it can be associated with one or more types. |
| Competencies | COMPETENCY_TABLE | Set Up CRM, Common Definitions, Competencies, Competencies, Competencies | Establish IDs for competencies and then tie the ID to the rating model and competency types. |

## Defining Competency Rating Models

Access the Competency Rating Model page (Set Up CRM, Common Definitions, Competencies, Competency Rating Model, Competency Rating Model).




Competency Rating Model page

A rating model specifies how you measure a provider group or worker's proficiency for a particular competency.

### *Rating Levels*

**Rating**

Enter a code that represents the rating level. When defining a rating, you must enter a code by using one alphanumeric character.

**Description**

Enter a description of the rating code by using up to 30 alphanumeric characters.

**Note.** Include the numeric number of the rating at the beginning of the rating level description. This enables the system to display the rating descriptions in numerical order instead of alphabetical order on the prompts where users select ratings levels.

**Rating Points**

Enter a numeric value that the assignment engine uses to represent the relative importance of each rating.

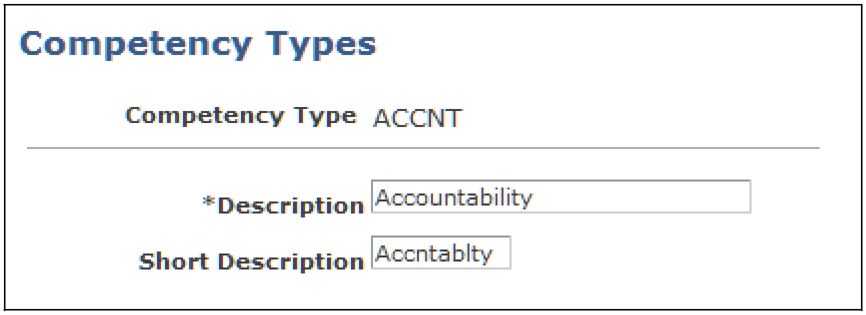
**Important!** When defining rating point scales for rating models that are used to rate the proficiency of a provider group or worker, use a numeric rating system in which the highest number of points represents the highest level of proficiency. Otherwise, the fit score values that the assignment engine calculates will not accurately reflect the best qualified candidate. The minimum proficiency, however, is tied to a service, not within the rating model.

### *See Also*

Chapter 14, "Setting Up and Performing Assignment Searches," page 219

## Defining Competency Types

Access the Competency Types page (Set Up CRM, Common Definitions, Competencies, Competency Types, Competency Types).

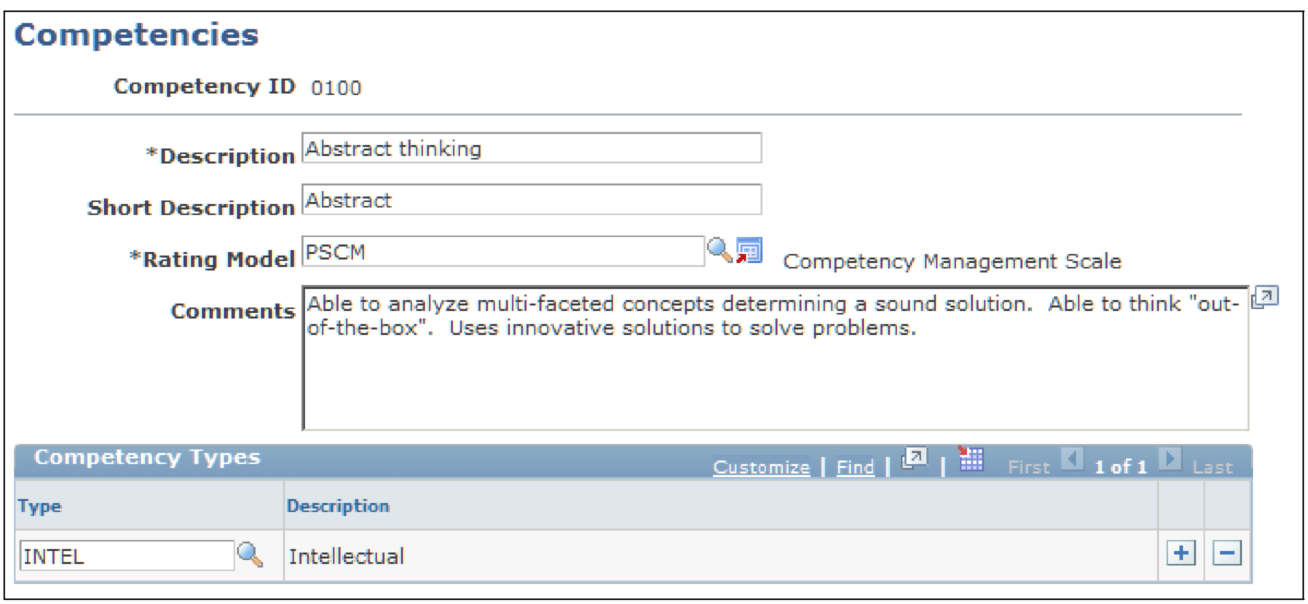



Competency Types page

Although competency types are not used by the system, you can develop reports that reflect competency categories.

## Defining Competencies

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




Competencies page

Competencies can represent any provider group or worker skills, abilities, knowledge, product support areas, or behaviors that are pertinent to jobs in the organization, such as the ability to repair and maintain specific products or equipment, knowledge of specialized manufacturing processes, or expertise with computer programming languages. The codes can be broad or detailed and can represent any type of competency.

To enable system-suggested assignments on service orders, define each skill that is required to complete work on a service order as a competency in your system. To enable system-suggested assignments on cases that are based on the problem type, category, type or detail that the user specifies, define competencies that correspond to this information.

**Description**

Enter a description that uses up to 30 alphanumeric characters.

**Note.** These descriptions should make sense to a user that is viewing a list of problem types. For example, competencies like *Works independently* or *Microsoft Certification* are probably not appropriate descriptions for problem-type competencies. If the product is a laptop, appropriate problem type competencies may include *hard drive* and *network connectivity*.

**Rating Model**

Select the model that is used to evaluate a provider group or worker's degree of expertise for this competency. Establish rating models on the Competency Rating Model page.

**Type**

Select competency types for this competency, if applicable. Establish competency types on the Competency Types page.

## Defining Competency Proficiency Levels

You establish competency proficiency for provider groups on the Group Competencies page of the Provider Groups component. Similarly, you establish competency proficiency for workers on the Competencies page of the Worker component.

The system uses the level of competency proficiency that you define for provider groups and workers to evaluate whether the provider group or worker is qualified to perform work on a service order or provide support on a case. You can also track the competency proficiency of your workforce for informational purposes.

### *See Also*

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Workers"

Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," page 193

## Defining Minimum Competency Requirements for Service Orders or Cases

In PeopleSoft Integrated FieldService, the system evaluates which workers are qualified to perform work on a service order by matching the minimum level of competencies that you define for the associated service or service activity with workers' proficiency for the corresponding competencies.

In PeopleSoft call center applications, you establish minimum competency proficiency requirements for the problem type, category, type or detail information on cases, which the system uses when performing call center agent assignment.

### See Also

*PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Setting Up Services"

*PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Setting Up Call Center Prompt Tables"

**Chapter 14**

# Setting Up and Performing Assignment Searches

The chapter provides an overview of assignment searches and discusses how to:

- Set up the assignment searches.
- Reviewing and assigning provider groups.
- Reviewing and assigning group members.

## Understanding Assignment Searches

This section discusses:

- Fit scores.
- Activity.
- Assignment criteria.
- Candidate selection and fit score generation.

### Fit Scores

In PeopleSoft Customer Relationship Management (PeopleSoft CRM), you can perform assignment searches to find the provider groups and group members that are best suited to a case or service order. The system returns a list of eligible candidates ranked by *fit score,* which is an evaluation of how well each provider group or group member matched criteria on the case or service order.

In addition to fit score, the system displays current availability and, for group member assignment searches that are performed for a case, the number of open cases that are currently assigned to the group member.

The system doesn't restrict the workforce assignment only to what it suggests. You can select the provider group and group member that the system recommends, any provider group and group member on the list (regardless of the fit score, current availability, or case load), or any provider group and group member that does not appear on the list, to be assigned to a case or service order.

**Note.** If you use auto-assignment to assign a provider group member to a case and multiple members tie for the highest fit score, the system assigns the member with the lowest case load. If two or more members tie for highest fit score and lowest case load, the system selects the first person in the list. In this situation the system makes an arbitrary assignment based on the member with the lowest person ID.

## Activity

The system displays the activity from the service order.

Because a competency may be required for more than one activity, this column indicates the activity to which the competency applies. This column does not appear when you perform the assignment search from a case.

## Assignment Criteria

PeopleSoft CRM uses the assignment engine to generate recommendations for provider group and group member assignments. The assignment engine uses this information in the assignment evaluation process:

- General assignment criteria.
- Case-specific assignment criteria.
- Service order-specific assignment criteria.
- Weighting factors.
- Assignment search data model.

### *General Assignment Criteria*

For each worker or provider group, you can define a list of values that the worker or provider group specializes or supports under these criteria: customer, location, product, product group, region, site, department, person type, security role.

When you perform an assignment search on a service order or case, the assignment engine matches the values of these criteria that are available on the service order or case to the values that are available on workers and provider groups. The weight, or relative importance, of each assignment criteria match determines a candidate's fit score.

Failure to match an assignment criteria value on a case or service order lowers the fit score but does not exclude a provider group or group member from the list of eligible candidates. However, if you do not select the Display Provider Groups and Group Members with no Criteria Matches check box on the Assignment Setup page, then a provider group or group member must match at least one criteria or competency value to be included in the list.

The assignment engine uses a different set of assignment criteria values when searching for a case in PeopleSoft HelpDesk or Support, or for a service order in PeopleSoft Integrated FieldService.

The table below illustrates:

- For help desk cases, the assignment engine matches values for department, location, product, product group, person type, problem type, and category, type, and detail (CTD) competencies.

- For help desk change requests, the assignment engine matches values for department, location, product, product group and security role. Help desk change requests are matched only against provider groups.
- For support cases, the assignment engine matches values for customer, site, region, product, product group, problem type, and CTD competencies.
- For service orders, the assignment engine matches values for customer, site, region, product group, product, service (or service activity) competency.
- For Service Center for Higher Education cases, the assignment engine matches values according to either help desk or support case criteria, based on the caller for the case. If the caller is a worker, help desk criteria is used: if the caller is a company contact or consumer (constituent), support criteria is used.

| ***Assignment Criteria*** | ***Used in Support Case?*** | ***Used in Help Desk Case?*** | ***Used in Help Desk Change Request?*** | ***Used in Service Order?*** |
|---|---|---|---|---|
| Competency - CTD | Yes | Yes | Yes | NA |
| Competency - Problem Type | Yes | Yes | Yes | NA |
| Competency - Service | NA | NA | NA | Yes |
| Customer | Yes | NA | NA | Yes |
| Location | NA | Yes | Yes | NA |
| Product | Yes | Yes | Yes | Yes |
| Product Group | Yes | Yes | Yes | Yes |
| Region | Yes | NA | NA | Yes |
| Site | Yes | NA | NA | Yes |
| Person Type | No | Yes | No | No |
| Department | No | Yes | Yes | No |
| Security Role | No | No | Yes | No |

As mentioned in the table, the assignment engine uses the region information to perform service order and support case assignment. A region search occurs when the Incident Address group box is available on a Case or Service Order page (according to the associated configuration template) with a specified incident location or when a region is associated with the site, contact, or customer on the transaction. The assignment engine runs the region search based on the zip code that you specify in the incident location.

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**Note.** This is only if the incident location is being displayed. If not, the region is determined by the customer specified. In this case, the region match starts with this region (not the parent region like it does for zip code). The region is derived from a hierarchy based upon the site, contact and customer. When a service order or case is created, the region is determined by obtaining the region, if available, from the site, then the contact and customer. If a new region is specified for the site, customer or contact, there will be no region to match on with the assignment engine.

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Before using zip codes as regions as assignment criteria, you must:

- Use the Region component to add zip codes as individual regions.
- Create a region, such as the Santa Clara county, and make it the parent region for all appropriate zip codes.

---

**Note.** You should define regions with the category of *Geography.*

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When the assignment engine runs, the zip code of the incident location determines the region. The system looks for the zip code with a category of *Geography* in the region table and starts with the parent region for assignment matches.

The system continues to look at the region hierarchy and reports region matches for any provider groups and group members that match the parent or grandparent regions. For example, if the parent region of Santa Clara County is Northern California, then the system includes any provider groups or group members associated with Santa Clara County or Northern California. If the provider group or group member is associated with both Santa Clara and Northern California, the match will be on the lower region (in this case, Santa Clara County).

### *Case-Specific Assignment Criteria*

For assignment searches that you perform for cases, you can match the problem type and CTD competencies of the case with competencies that are defined for group members and provider groups.

You can specify competencies for problem types, categories, specialty types and details to be used when the system performs an assignment search from a case in PeopleSoft Support or HelpDesk.

The assignment engine matches the competency values in these fields on the case with group members or provider groups that are associated with the same competency values. Any provider group or group member that does not meet the minimum competency proficiency defined for the CTD or problem type will not have a match for the competency.

---

**Note.** There is a hierarchical relationship among category, specialty type, and detail. A category includes specialty types, which contain details. When all three levels of information are available in a case that needs to be assigned, the value from the lowest available level is used in the assignment search. For example, if the case has a category, specialty type and detail, the assignment uses the competency information that is defined for detail when performing the assignment search. If it has category and specialty type, the system uses the competency information for type. If it has only the category, the system uses the competency information for category.

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### Service Order-Specific Assignment Criteria

For assignment searches that you perform for service orders, the assignment engine matches (besides general assignment criteria) the competency proficiency of provider groups and group members with the minimum competency proficiency requirements on the service (or service activity). Any provider group or group member that does not meet the minimum competency proficiency that is defined for the service or service activity will not have a match for the competency.

The service competency data that the assignment engine uses depends on:

- Whether competency data is defined for a service or service activity.
- Whether the assignment search is initiated from the service order activity actions section or the service order line.

If activities are defined for the service, the assignment engine uses only the competency requirements that are defined for the activities, even if competencies are also defined for the service.

If you perform the assignment search from the service order activity actions for a service with one or more activities, the system evaluates provider group or group member competency against the competency requirements that are defined for all activities that are associated with the service.

If you perform the assignment search from the service order line, the system considers only the competency requirements of the activity on the line.

If no activities are defined for the service, the assignment engine uses the competency information that is defined for the service. If no competencies are defined for the service, the assignment engine does not perform a competency match; it uses only assignment criteria matches to evaluate candidates for service order assignment.

### Weighting Factors

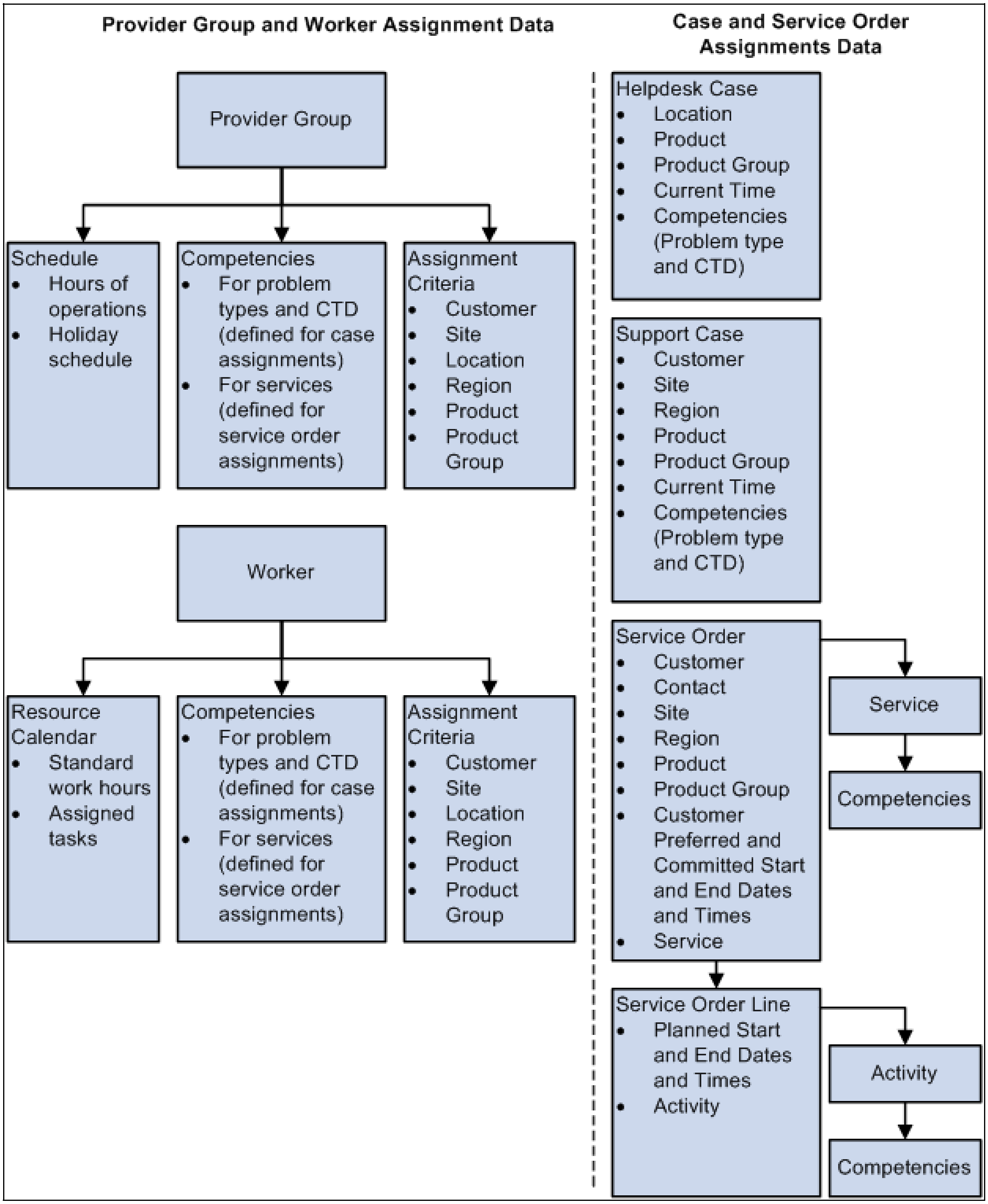
You can define the relative importance of assignment criteria for provider group and group member searches. These weights may differ between the provider group and group member.

For example, if the CTD competency (applicable to support and help desk cases) has no importance when assigning provider groups in cases, but region is important, set the group weight for the CTD competency to *0* and the weight for region to *5.*

If CTD competency and product are equally important and customer is somewhat important for group member searches, you can then set the weights to *5, 5,* and *3,* respectively.

### Assignment Search Data Model

This diagram illustrates the information that the assignment engine uses to generate a list of provider groups or worker candidates to assign to tasks on a help desk case, support case, or service order and to display current availability status:




Assignment Search Data Model

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**Note.** The HelpDesk case, provider group assignment criteria, and worker assignment criteria should also contain the person type.

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### *See Also*

Chapter 13, "Managing Workforce Competencies," page 211

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Workers," Maintaining Worker Information

Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," page 193

Chapter 16, "Using Calendars," page 257

*PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Setting Up Products," Defining Products

*PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Setting Up Services"

*PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Setting Up Call Center Prompt Tables"

## Candidate Selection and Fit Score Calculations

For both provider group and group member searches, the assignment engine builds a table in the database that represents each criteria match between provider groups or group members and the values on a service order or case.

After completing the search, the system returns a list of the provider groups or group members with criteria matches. The aggregate fit score of the provider groups or group members sequences the list.

### *Evaluating Workforce Assignment*

For each assignment criteria match between a provider group or group member and the evaluated help desk case, support case, or service order, the system inserts a row into a temporary table called Criteria Fit (RF_ASSIGN_FIT).

Each row includes the name of the group member or provider group, the criteria that was matched, and the relative importance, or weight, of the match. The weight value for the match becomes the number of points that are assigned to the match.

For matches on problem type competency, CTD competency, or both, the number of points depends on the number of competencies and the provider group or group member's proficiency for those competencies.

For service competency matches, the number of points also depends on the number of competencies and the provider group or group member's proficiency for those competencies. For these reasons, the number of competency points may be less than the competency weight.

### *Determining Workforce Availability*

The system determines the availability status of each provider group or group member. For provider groups, the system checks the hours of operation and the holiday schedule that you define for the provider group on the Schedule page in the Provider Group component.

If the customer preferred (or committed, if customer preferred doesn't exist) start and end dates and times on a service order, or the current date and time on a case, correspond to an open period for the provider group, and if the start and end dates are not on their holiday schedule, the provider group is considered available for assignment.

For group members, the system checks for tasks on the worker's resource calendar as well as the worker's schedule.

If the customer preferred start and end dates and times on a service order (if they don't exist, the system uses the committed dates), or the current date and time on a case, correspond to a period during the group member's standard work hours for which no other task has been assigned, the group member is considered available for assignment.

Establish standard workweek and workday hours during installation on the Calendar Options page (select Set Up CRM, Install, Installation Options). You can modify an individual worker's standard hours on the Schedule page in the Worker component.

### Displaying Case Load for Candidates

For group member assignment searches that you perform from a case, the system determines how many open cases are currently assigned to the group member. To facilitate workload balancing, this information appears for each agent who is returned for a group member search.

### Calculating Candidate Fit Scores

For each provider group or group member with a criteria match that is recorded in the Criteria Fit table, the system sums the weight value that is associated with each criteria match row and calculates the fit score for the provider group or group member using this equation:

$$\text{Fit score} = \frac{\text{Total number of match points for the provider group or group member}}{\text{Number of possible match points for the case or service order}} \times 100$$

Fit score

where the number of possible match points is defined by the criteria weight factor.

For example, for a group member assignment search, suppose that Jon Smith matched three assignment criteria (region, customer, and site) on a service order for which no competency requirements were defined, and this is the weight for each of the matching assignment criteria that applies to service orders:

- Customer = 5
- Region = 4
- Product = 3
- Site = 0
- Competency - Service = 4

The total number of possible match points is the total of the weight values: 5 + 4 + 3 + 0 + 4 = 16.

For the service order in this example, Jon Smith matched region, customer, and site. His total number of match points is calculated as follows:

4 + 5 + 0 = 9

Jon's fit score = 9 / 16 x 100 =56%

### *Accounting for Competency Proficiency on a Service Order*

When calculating fit scores for service order assignments, the assignment engine accounts for the provider group or group member's competency proficiency and the relative importance of the competency that is defined for the service or service activity using this equation:

$$\text{Competency score} = \frac{(C1Wt*C1CP) + (C2Wt*C2CP) + \ldots\ (C\mathit{n}WT*C\mathit{n}CP)}{(C1Wt*C1MP) + (C2Wt*C2MP) + \ldots\ (C\mathit{n}WT*C\mathit{n}MP)}$$

Competency score

- C*n*Wt is the weight of the competency defined for the service or service activity.
- C*n*CP is the candidate's proficiency rating for the competency.
- C*n*MP is the maximum proficiency rating.

For example, suppose that the service order in the previous example was for an air-conditioner maintenance service with no activities. The air-conditioner maintenance service has two competency requirements: basic maintenance and compressor replacement.

The basic maintenance competency requires a minimum proficiency of 2 on a 1 to 6 rating scale, where 6 is the maximum proficiency rating. The compressor replacement competency requires a minimum proficiency of 3 on the same rating scale.

The service definition for air-conditioner maintenance weights the relative importance of the basic maintenance competency for performing the service as a 5 on a 0 to 5 scale, while the relative importance of the compressor replacement competency is weighted at 2 on the same scale.

This table summarizes the competency data for the air-conditioner maintenance service:

| ***Competency*** | ***Minimum Proficiency*** | ***Relative Importance to the Service (CnWt)*** | ***Maximum Proficiency on Rating Model (CnMP)*** |
|---|---|---|---|
| Basic Maintenance (C1) | 2 | 5 | 6 |
| Compressor Replacement (C2) | 3 | 2 | 6 |

This table shows the competency proficiency rating for three technicians, Jon Smith, Bill Jones, and Jane Markowitz:

| ***Worker*** | ***Basic Maintenance Competency Proficiency (C1CP)*** | ***Compressor Replacement Competency Proficiency (C2CP)*** |
|---|---|---|
| Jon Smith | 4 | 3 |
| Bill Jones | 2 | 0 |

 

| *Worker* | *Basic Maintenance Competency Proficiency (C1CP)* | *Compressor Replacement Competency Proficiency (C2CP)* |
|---|---|---|
| Jane Markowitz | 5 | 4 |

The competency score for each technician is calculated as follows:

Jon Smith's competency score = (5 * 4) + (2 * 3) / (5 * 6) + (2 * 6) = 0.62

Bill Jones' competency score = (5 * 2) / (5 * 6) + (2 * 6) = 0.24

Notice that Bill Jones did not match the proficiency requirements for the compressor replacement competency; therefore, no points for the match are included in the calculation.

Jane Markowitz's competency score = (5 * 5) + (2 * 4) / (5 * 6) + (2 * 6) = 0.79

To calculate the fit score for each worker, the competency score is multiplied by the assignment weighting factor of the corresponding assignment criterion, which is defined for you in your installation.

Let's assume that the same criteria weight factors as in the previous fit score calculation example: Customer = 5, Region = 4, Product = 3, Site = 0, Competency - Service = 4.

Let's also assume that, except for the competency proficiency on competency - service, Jon, Bill, and Jane matched on identical criteria. Their fit scores are calculated as follows:

Jon Smith's fit score = 4+5+0+(4*0.62)/ 5+4+3+0+4 = 0.717

Bill Jones's fit score = 4+5+0+(4*0.24)/ 5+4+3+0+4 = 0.622

Jane Markowitz's fit score = 4+5+0+(4*0.79)/5+4+3+0+4 = 0.76

The assignment engine sorts these candidates:

- Jane Markowitz, 76%
- Jon Smith, 72%
- Bill Jones, 62%

If you view the detail scores, the system displays the criteria matches that compose the fit scores. For example, under Jon Smith's name, you would see this breakdown:

| *Criteria* | *Competency* | *Score* |
|---|---|---|
| Region | NA | 4/16 = 25% |
| Customer | NA | 5/16 = 31.3% |
| Site | NA | 0/16 = 0% |
| Competency - Service | Basic Maintenance | (4 x (5 x 4) / 42) / 16) = 11.90% |

 

| ***Criteria*** | ***Competency*** | ***Score*** |
|---|---|---|
| Competency - Service | Compressor Replacement | (4 x (2 x 3) / 42) / 16) = 3.6% |

### *Accounting for Competency Proficiency on a Case*

Similar to calculating service and service activity competencies, when the assignment engine calculates fit scores for case assignments, it accounts for the provider group or group member's competency proficiency and the relative importance of the competency values that are specified for problem type or CTD on the case using this equation:

$$\text{Competency score} = \frac{(C1Wt*C1CP) + (C2Wt*C2CP) + \ldots\ (C\mathit{n}WT*C\mathit{n}CP)}{(C1Wt*C1MP) + (C2Wt*C2MP) + \ldots\ (C\mathit{n}WT*C\mathit{n}MP)}$$

Competency score

- C*n*Wt is the weight of the competency that is defined for the problem type or CTD.
- C*n*CP is the candidate's proficiency rating for the competency.
- C*n*MP is the maximum proficiency rating.

For example, suppose that the case involves a problem with a personal computer (PC) and the required problem type competency and category competency are IBM PC Hardware and PC Configuration, respectively. If Jon Smith has a proficiency of 4 on a 1 to 6 rating scale for both competencies, then Jon's competency score for problem type is:

4 /6 = 0.666

His competency score for the category is also 0.666.

Let's assume that the following criteria weight factors are set:

Customer = 5, Region = 4, Product = 3, Site = 0, Competency - Problem Type = 4, Competency - CTD = 4.

If Jon Smith matches the customer and both competencies on the case, then his fit score is calculated as follows:

Jon Smith's fit score = 5+(4*0.666)+(4*0.666) / 5+4+3+0+4+4 = 0.516 or 52%

### *Accounting for Product Proficiency on a Service Order or Case*

When calculating fit scores for service order and case assignments, the assignment engine accounts for the provider group or group member's product proficiency using this equation:

Product score = PCP/PMP

- PCP is the candidate's proficiency rating for the product.
- PMP is the maximum proficiency rating.

For example, suppose that the case or service order involves a problem with an air conditioner.

 

If Bill Jones has a proficiency of 2 for this product on a 1 to 6 rating scale, then Bill's product score is:

2 / 6 = 0.333

Let's assume that the criteria weight factors are the same as in the previous examples:

Customer = 5, Region = 4, Product = 3, Site = 0, Competency - Problem Type = 4, Competency - CTD = 4.

If Bill Jones matches the customer and product on the case or service order, this is how his fit score is calculated:

Bill Jones' fit score = 5 + (3*0.333) / 5+4+3+0+4+4 = 0.299 or 30%

### *See Also*

Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," page 193

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Workers," Maintaining Worker Information

Chapter 13, "Managing Workforce Competencies," page 211

## Setting Up the Assignment Searches

To define assignment searches, use the Worker (RD_WORKER_2), Provider Group (RF_PROVIDER_GRP), Service (RF_SERVICE), Problem Type (RC_PROBTYPE), Category Type Detail (RC_CA_TY_DE) and Assignment Weighting Factors (RF_ASSIGNMENT_WGHT) components.

This section discusses how to:

- Define worker schedules and assignment criteria.
- Define provider group schedules and assignment criteria.
- Associate competency information with services and service activities.
- Associate competency information with problem types.
- Associate competency information with categories, and specialty types and details.
- Establish weighting factors for provider group criteria matches.
- Establish weighting factors for group member criteria matches.
- Specify assignment engine setup.

 

## Pages Used to Set Up Assignment Searches

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Job | RD_ASGN_JOB | Workforce, Search Worker, Job | Specify a holiday schedule for the worker. This information helps to determine worker's availability. |
| Work Schedule | RD_WORKER_SCHEDULE | Workforce, Search Worker, Work Schedule | Specify worker's workday information if it differs from the information that you define for the installation on the Calendar Option page. This information helps to determine worker's availability. |
| Skills and Competencies | RD_WORKER_CMP_PROF | Workforce, Search Worker, Skills and Competencies | Associate competency information with the worker. This information is optional. |
| Assignment Criteria | RD_WORKER_CRITERIA | Workforce, Search Worker, Assignment Criteria | Define assignment criteria for the worker. This information is optional. |
| Schedule | RF_PROVGRP_TIME | Workforce, Provider Groups, Schedule | Specify a holiday schedule and workday information for the provider group. This information helps to determine provider group's availability. |
| Assign Group Criteria | RF_PRV_GRP_CRIT | Workforce, Provider Groups, Assign Group Criteria | Define assignment criteria for the provider group. The Region criterion is required when defining provider groups. |
| Group Competencies | RF_PRVGRP_COMP | Workforce, Provider Groups, Group Competencies | Associate competency information with the provider group. This information is optional. |
| Service Details | RF_SERVICE_ATTRIB | Set Up CRM, Product Related, FieldService, Services, Service Details | Associate competency information with the service. This information is optional. |

 

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Service Activities | RF_SERVICE_ACT | Set Up CRM, Product Related, FieldService, Services, Service Activities | Associate competency information with the service activity. This information is optional. |
| Problem Type | RC_PROBTYPE | Set Up CRM, Product Related, Call Center, Problem Type, Problem Type | Associate competency information with the problem type. You use problem types to associate competencies with products that a worker needs to resolve a problem with the product. This information is optional. |
| Category | RC_CATEGORY | Set Up CRM, Product Related, Call Center, Category/Type/Detail, Category | Associate competency information with the category. This information is optional. |
| Type and Detail | RC_CA_TY_DE_PNL | Set Up CRM, Product Related, Call Center, Category/Type/Detail, Type and Detail | Associate competency information with the type and detail. This information is optional. |
| Group Weighting Factors | RF_ASSIGN_WGHT_PG | Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Group Weighting Factors | Establish the relative importance of assignment criteria matches for customer, location, product, product group, region, site, department, person type, role, and competency values on CTD, problem type, and service during assignment searches for provider groups. |
| Member Weighting Factors | RF_ASSIGNMENT_WGHT | Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Member Weighting Factors | Establish the relative importance of assignment criteria matches for customer, location, product, product group, region, site, department, person type, role, and competency values on CTD, problem type, and service during assignment searches for provider group members. |
| Assignment Setup | RF_PRD_RATE_MDL | Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Assignment Setup | Specify the rating model that is used to define proficiency levels for product competencies and configure search results. |

 

## Defining Worker Schedules and Assignment Criteria

Define workers using the Worker component.

### *Specifying Holiday Schedules*

Access the Job page (Workforce, SearchWorker, Job).

---

**Note.** You are not required to define standard workweek information for your installation or for individual workers. However, the system requires this information to create entries automatically on a worker's calendars when a service order is assigned to the worker.

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See and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Workers," Entering Job Details.

See and Chapter 15, "Defining Holiday Schedules," page 249.

### *Specifying Workday Information*

Access the Work Schedule page (Workforce, SearchWorker, Work Schedule).

See and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Workers," Defining Default Schedules.

### *Associating Competencies with Workers*

Access the Skills and Competencies page (Workforce, SearchWorker, Skills and Competencies).

See and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Workers," Associating Competencies with Workers.

See and Chapter 13, "Managing Workforce Competencies," page 211.

### *Defining Assignment Criteria*

Access the Assignment Criteria page (Workforce, SearchWorker, Assignment Criteria).

See and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Workers," Defining Job Assignment Criteria.

See and Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," Defining Group Assignment Criteria and Competencies, page 206.

### *See Also*

Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," page 193

## Defining Provider Group Schedules and Assignment Criteria

Every worker who can be assigned to a case or a service order must be associated with an active provider group. Define provider groups using the Provider Group component.

### *Specifying Holiday Schedules and Workday Information*

Access the Schedule page (Workforce, Provider Groups, Schedule).

See  and Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," Defining Schedules for Provider Groups, page 205.

### *Defining Assignment Criteria*

Access the Criteria page (Workforce, Provider Groups, Assign Group Criteria).

See  and Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," Defining Assignment Criteria, page 207.

### *Associating Competency Information with the Provider Group*

Access the Group Competencies page (Workforce, Provider Groups, Group Competencies).

See  and Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," Associating Competencies with Provider Groups, page 209.

### *See Also*

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Workers," Defining Job Assignment Criteria

## Associating Competency Information with Services and Service Activities

Access the Service Details (Set Up CRM, Product Related, FieldService, Services, Service Details) and Service Activities (Set Up CRM, Product Related, FieldService, Services, Service Activities) pages.

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

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

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

## Associating Competency Information with Problem Types

Access the Problem Type page (Set Up CRM, Product Related, Call Center, Problem Type, Problem Type).

See  and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Setting Up Call Center Prompt Tables," Setting Up Basic Prompt Tables for Cases.

## Associating Competency Information with Categories, Specialty Types, and Details

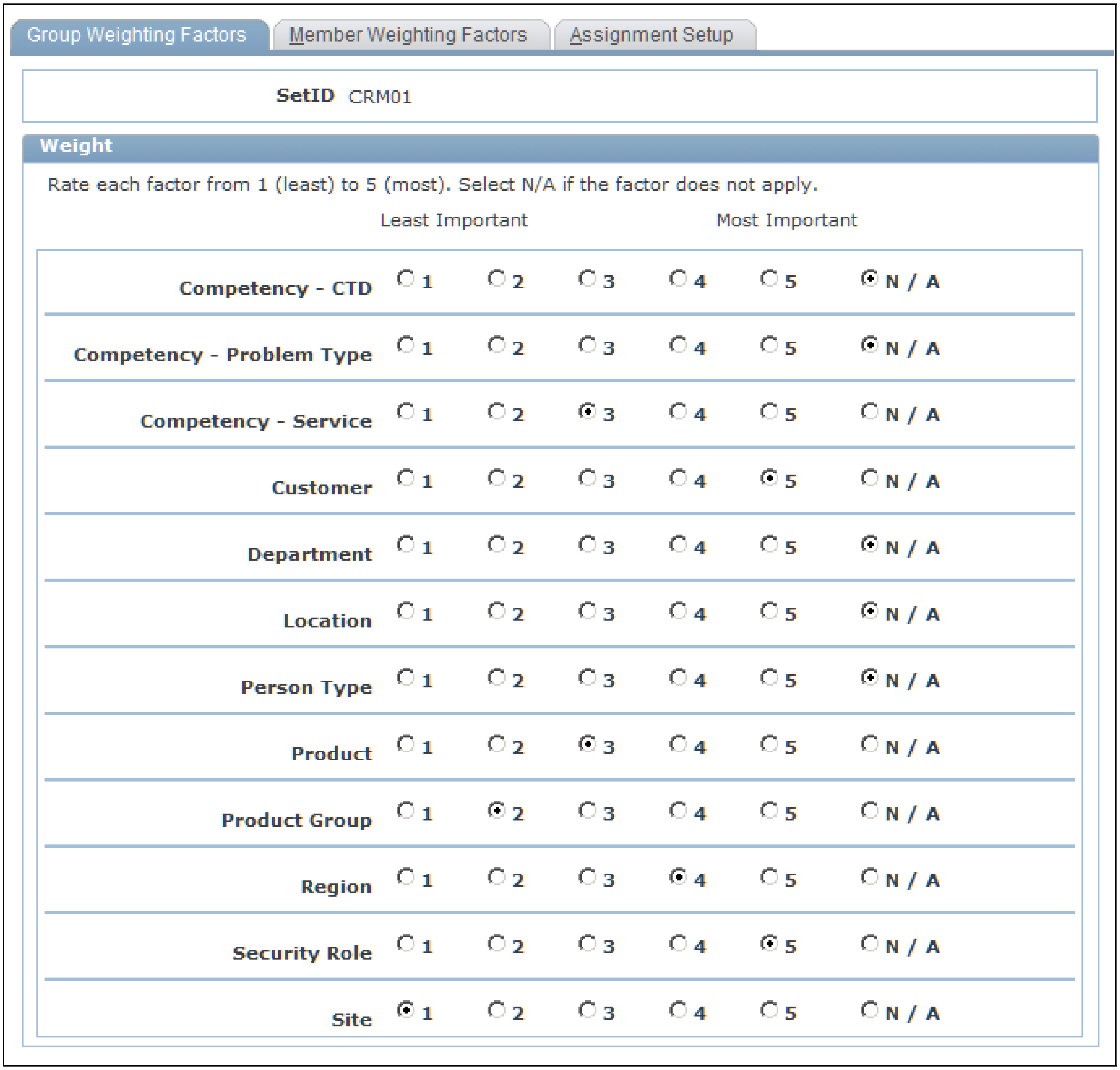
Access the Category (Set Up CRM, Product Related, Call Center, Category/Type/Detail, Category), Type (Set Up CRM, Product Related, Call Center, Category/Type/Detail, Type), and Detail (Set Up CRM, Product Related, Call Center, Category/Type/Detail, Detail) pages.

See  and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Setting Up Call Center Prompt Tables," Setting Up Basic Prompt Tables for Cases.

## Establishing Weighting Factors for Provider Group Criteria Matches

Access the Group Weighting Factors page (Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Group Weighting Factors).




Group Weighting Factors page

Select the relative importance of a provider group's assignment criteria matches for competency on CTD (support and help desk cases), problem type (support and help desk cases), service (service orders), customers (service orders and support cases), department (help desk cases), locations (help desk cases), person type (help desk cases), products (all), product groups (all), regions (service orders and support cases), roles (change management only), and sites (service orders and support cases).

### *See Also*

Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," page 193

## Establishing Weighting Factors for Group Member Criteria Matches

Access the Member Weighting Factors page (Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Member Weighting Factors).

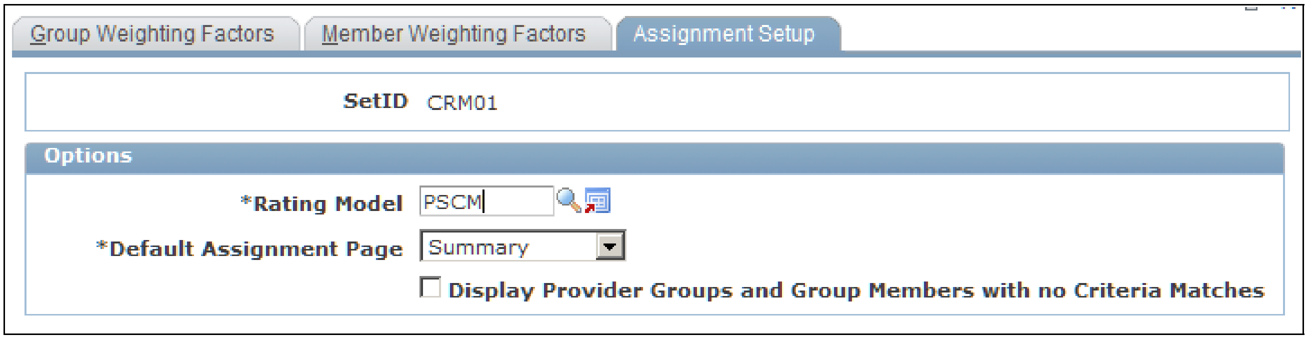

Member Weighting Factors page

Select the relative importance of a of a group member's assignment criteria matches for competency on CTD (support and help desk cases), problem type (support and help desk cases), service (service orders), customers (service orders and support cases), department (help desk cases), locations (help desk cases), person type (help desk cases), products (all), product groups (all), regions (service orders and support cases), roles (change management), and sites (service orders and support cases).

## Specifying Assignment Engine Setup

Access the Assignment Setup page (Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Assignment Setup).




Assignment Setup page

| | |
|---|---|
| **Rating Model** | Enter the rating model to indicate required proficiency levels for products. Establish rating models on the Competency Rating Model page. |
| **Default Assignment Page** | Select the page that the system initially returns when you perform a search. Values are:<br>*Summary:* The system displays the Provider Group Summary page when you perform a provider group search and the Candidate Summary page when you perform a provider group member search for a technician or agent.<br>*Detail:* The system displays the Provider Group Detail page when you perform a provider group search and the Candidate Detail page when you provide a provider group member search for a technician or agent. |
| **Display Provider Groups and Group Members with no Criteria Matches** | Select to enable all provider groups and group members to appear as part of the assignment engine search results when you click Suggest a Provider Group or Suggest a Group Member from a case or service order. Clear this check box if only the provider groups and group members that have criteria matches should appear in the search results. |

### *See Also*

Chapter 13, "Managing Workforce Competencies," Defining Competency Rating Models, page 214

# Reviewing and Assigning Provider Groups

This section lists common elements and discusses how to:

- Review provider group summary search results and assign provider groups.

- Review provider group detail search results and assign provider groups.

### *See Also*

*PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Creating and Managing Service Orders," Setting Up Automatic Service Order Assignments

## Common Elements Used in This Section

**Provider Group Name** — Displays the name of the eligible provider group. Click the Transfer to Provider Group button next to the name to access the Provider Group component and view the provider group definition record.

**Select** — Click to assign the selected provider group to the corresponding service order or case.

**Available** — Displays the group or group member's availability. A green circle indicates availability; a red square indicates unavailability.

**Note.** The Available column does not appear if you do not specify a start or end period on the service order.

**Score** — Displays the provider group's score for the criteria match based on the assignment weight factor that is defined on the Group Weighting Factors page in the Assignment Engine Setup component.

**Total Score** — Displays the total fit score of the provider group.

**Return To Service Order** and **Return To Case** — Click to return to the component (service order or case, respectively), where you access this page.

## Pages Used to Review and Assign Provider Groups

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Provider Group Summary | RF_ASSIGN_PG_SEC | • On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group button.<br><br>Click the Summary link if the Provider Group Detail page appears.<br><br>• On the Case page in PeopleSoft Support or HelpDesk, click the Suggest a Provider Group button.<br><br>Click the Summary link if the Provider Group Detail page appears.<br><br>• On the Dispatch Board page click the Suggest a Provider Group button.<br><br>• On the Change Request Task page, click the Suggest Assignments button. | Review the provider group search result (summary view) and select a provider group that you can assign to a service order or a case. |

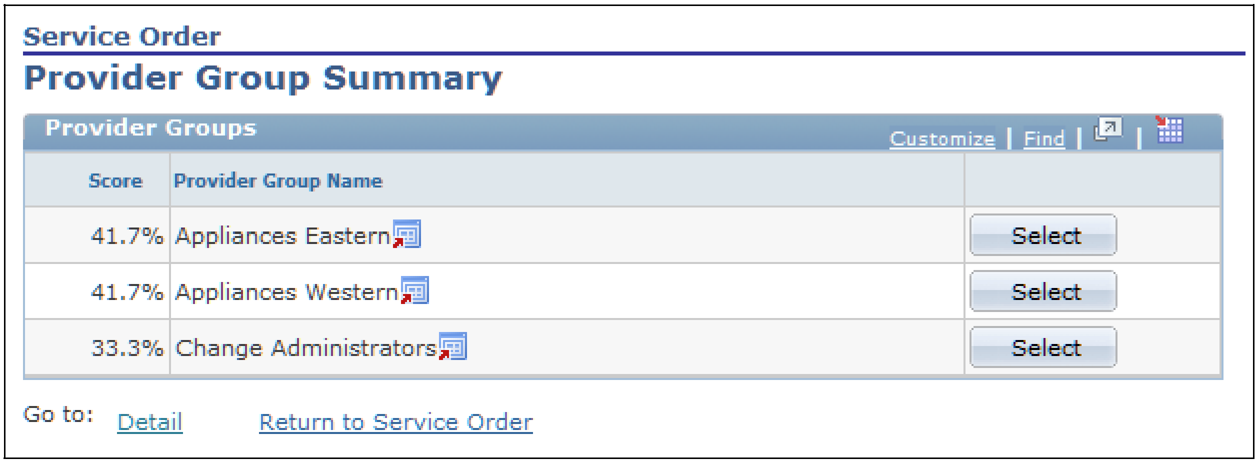
 

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Provider Group Detail | RF_ASSIGN_PGDT_SEC | • On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group button.<br><br>Click the Detail link if the Provider Group Summary page appears.<br><br>• On the Case page in PeopleSoft Support or HelpDesk, click the Suggest a Provider Group button.<br><br>Click the Detail link if the Provider Group Summary page appears.<br><br>• On the Change Request Task page, click the Suggest Assignments button. Click the Detail link if the Provider Group Summary page appears.<br><br>• On the Dispatch Board page click the Suggest a Provider Group button.<br><br>Click the Detail link if the Provider Group Summary page appears. | Review the provider group search result (detail view). You can select a provider group that you can assign to a service order or a case from here as well. |

## Reviewing Provider Group Summary Search Results and Assigning Provider Groups

Access the Provider Group Summary page (On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group button. Click the Summary link if the Provider Group Detail page appears).




Provider Group Summary page

The Provider Group Summary page lists provider groups that matched at least one assignment criteria value on the case or service order.

**Detail** Click to access the Provider Group Detail page and view the assignment weight factors that are used to calculate the fit scores.

## Reviewing Provider Group Detail Search Results and Assigning Provider Groups

Access the Provider Group Detail page (On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group button. Click the Detail link if the Provider Group Summary page appears).


Provider Group Detail page

**Summary** Click to access the Provider Group Summary page.

**Criteria Code** Displays the assignment criterion on the case or service order that the provider group matched.

# Reviewing and Assigning Group Members

This section lists common elements and discusses how to:

- Review group member summary search results and assign group members.
- Review group member detail search results and assign group members.

### *See Also*

*PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Creating and Managing Service Orders," Setting Up Automatic Service Order Assignments

## Common Elements Used in This Section

| | |
|---|---|
| **Select** | Select this check box to indicate a group member to assign, and then click the Select button. If the assignment is for a service order line, you can select multiple group members. |
| **Name** | Displays the name of the eligible group member. Click the Transfer to Worker button to access the Worker component and view the worker definition record. |
| **Cases** | Displays the number of cases that are assigned to an agent. This column appears only for worker assignment searches that you perform from a case in PeopleSoft Support or HelpDesk. |
| **Score** | Displays the group member's score for each criteria match based on the criteria assignment weight factor for the criteria code that you define on the Member Weighting Factors page in the Assignment Engine Setup component. |
| **Total Score** | Displays the total fit score of the group member. |
| **Return To Service Order** and **Return To Case** | Click to return to the service order or case from which you accessed this page. |

## Pages Used to Review and Assign Group Members

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Candidate Summary | RF_ASSIGN_LIST_SEC | • On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group Member button.<br><br>Click the Summary link if the Candidate Detail page appears.<br><br>• On the Case page in PeopleSoft Support or HelpDesk, click the Suggest an Agent button.<br><br>Click the Summary link if the Candidate Detail page appears.<br><br>• On the Dispatch Board page, click the Suggest Group Member button.<br><br>Click the Summary link if the Candidate Detail page appears. | Review the group member search result (summary view) and select group members that you can assign to a service order or a case. |

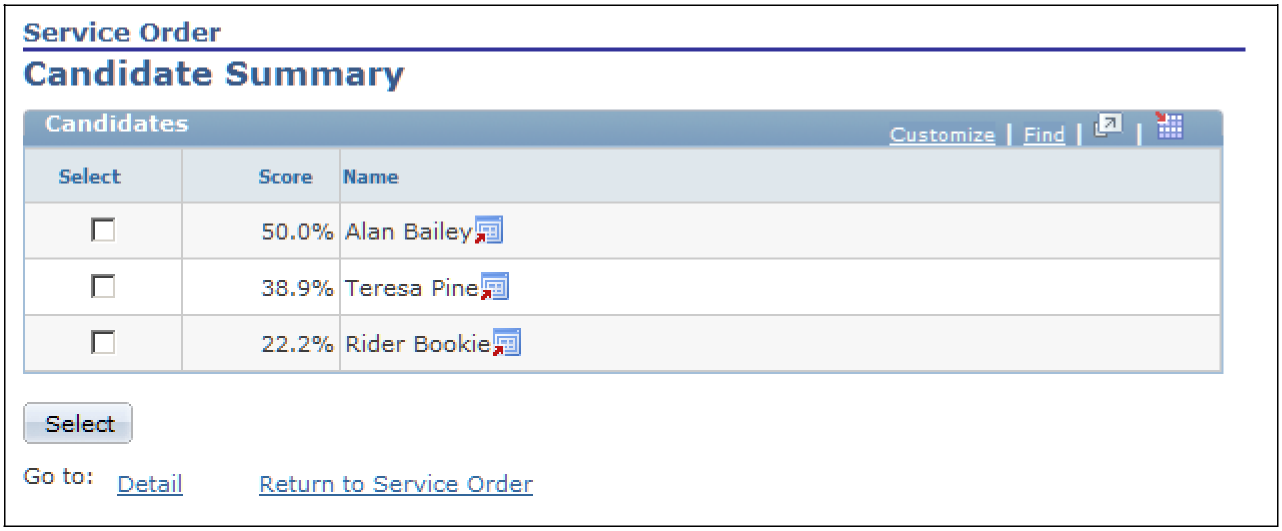
 

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Candidate Detail | RF_ASSIGN_DET_SEC | • On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group Member button.<br><br>Click the Detail link if the Candidate Summary page appears.<br><br>• On the Case page in PeopleSoft Support or HelpDesk, click the Suggest an Agent button.<br><br>Click the Detail link if the Candidate Summary page appears.<br><br>• On the Dispatch Board page, click the Suggest Group Member button.<br><br>Click the Detail link if the Candidate Summary page appears. | Review the group member search result (detail view). You can select a group member that you can assign to a service order or a case from here as well. |

## Reviewing Group Member Summary Search Results and Assigning Group Members

Access the Candidate Summary page (On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group Member button. Click the Summary link if the Candidate Detail page appears.).




Candidate Summary page

The Candidate Summary page lists the members in the provider group who matched at least one assignment criteria value on the case or service order, or all provider group members if you select the *Display Provider Groups and Group Members with no Criteria Matches* check box on the Assignment Setup page. For support and help desk cases, the system shows the number of open cases that are currently assigned to each group member on the list.

---

**Note.** You must specify a provider group on the case or service order before performing a search on group members.

---

| | |
|---|---|
| **Detail** | Click to access the Candidate Detail page and view the assignment weight factors that are used to calculate the total fit scores. |

## Reviewing Group Member Detail Search Results and Assigning Group Members

Access the Candidate Detail page (On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group Member button. Click the Detail link if the Candidate Summary page appears.).

Service Order

Candidate Detail

Candidates — Customize | Find

| Select | Score | Total Score | Name | Criteria Code | Description |
| --- | --- | --- | --- | --- | --- |
| ☐ | 27.8% | 50.0% | Alan Bailey | Customer | MMA Property Management Group |
| | 22.2% | | | Region | USA |
| ☐ | 27.8% | 38.9% | Teresa Pine | Customer | MMA Property Management Group |
| | 11.1% | | | Product Group | Air Conditioner |
| ☐ | 22.2% | 22.2% | Rider Bookie | Region | USA |

Select

Go to: Summary Return to Service Order

Candidate Detail page

**Summary** Click to return to the Candidate Summary page.

**Criteria Code** Displays the assignment criterion on the case or service order that the candidate matched. Associate values for each criteria code with workers on the Assign Criteria page in the Worker component.

## Chapter 15

# Defining Holiday Schedules

This chapter provides an overview of holiday schedules and discusses how to:

- Define holiday schedules.
- Associate provider groups with holiday schedules.
- Associate workers with holiday schedules.
- Update workers' calendars with specified holiday schedules.

## Understanding Holiday Schedules

In PeopleSoft Customer Relationship Management (PeopleSoft CRM), you can associate holiday schedules with provider groups and individual workers. You can schedule a process to update worker calendars to reflect holiday information. On calendars, holidays appear as a type of task.

In PeopleSoft Integrated FieldService, the assignment engine indicates on the assignment search result that an eligible provider group or worker is unavailable for assignment if the period that the committed start and end dates defined on a service order coincides with a defined holiday.

Similarly, in PeopleSoft call center applications, the assignment engine indicates that a provider group or worker is unavailable for case assignment if the date on which you perform the assignment search corresponds with a defined holiday. (Regardless of availability, however, you can always manually assign provider groups and workers to a case or service order.)

---

**Important!** Workers do not inherit holiday schedules from their provider groups.

---

Because workers can belong to multiple provider groups, you must define and maintain holiday schedules for workers and provider groups separately. If you want workers to inherit holiday schedules from their provider groups, you must institute a manual process to ensure synchronization of holiday schedules.

## Defining Holiday Schedules, Time Frames, and Sales Quota Rollups

To define holiday schedules, time frames and sales quotas, use the Installation (RB_INSTALLATION), Holiday Schedule (HOLIDAY_SCHED_TBL) and Time Frames (RSF_TF) components.

This section discusses how to:

- Define standard workday information.

- Define holidays.
- Define time frames for forecasting, pipeline analysis, planning and portfolio examination.
- Define time frames for sales quota relapse.

## Pages Used to Define Holiday Schedules

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Calendar Options | RF_INSTALLATION | Set Up CRM, Install, Installation Options, Calendar Options | Define standard workday information. The system uses the start and end times on this page as the start and end times of any holiday that you define. The system displays these times on workers' calendars. |
| Holiday Schedule | HOLIDAY_SCHED_TBL | Set Up CRM, Common Definitions, Calendars and Schedules, Holiday Schedule, Holiday Schedule | Define holidays. |
| Timeframes | RSF_TF_MAIN | Set Up CRM, Common Definitions, Calendars and Schedules, Time Frames, Timeframes | Define time frames for forecasting, pipeline analysis, planning and portfolio examination. |
| Sales Information | RSF_TF | Set Up CRM, Common Definitions, Calendars and Schedules, Time Frames, Sales Information | Define time frames for sales quota rollups. |

## Defining Standard Workday Information

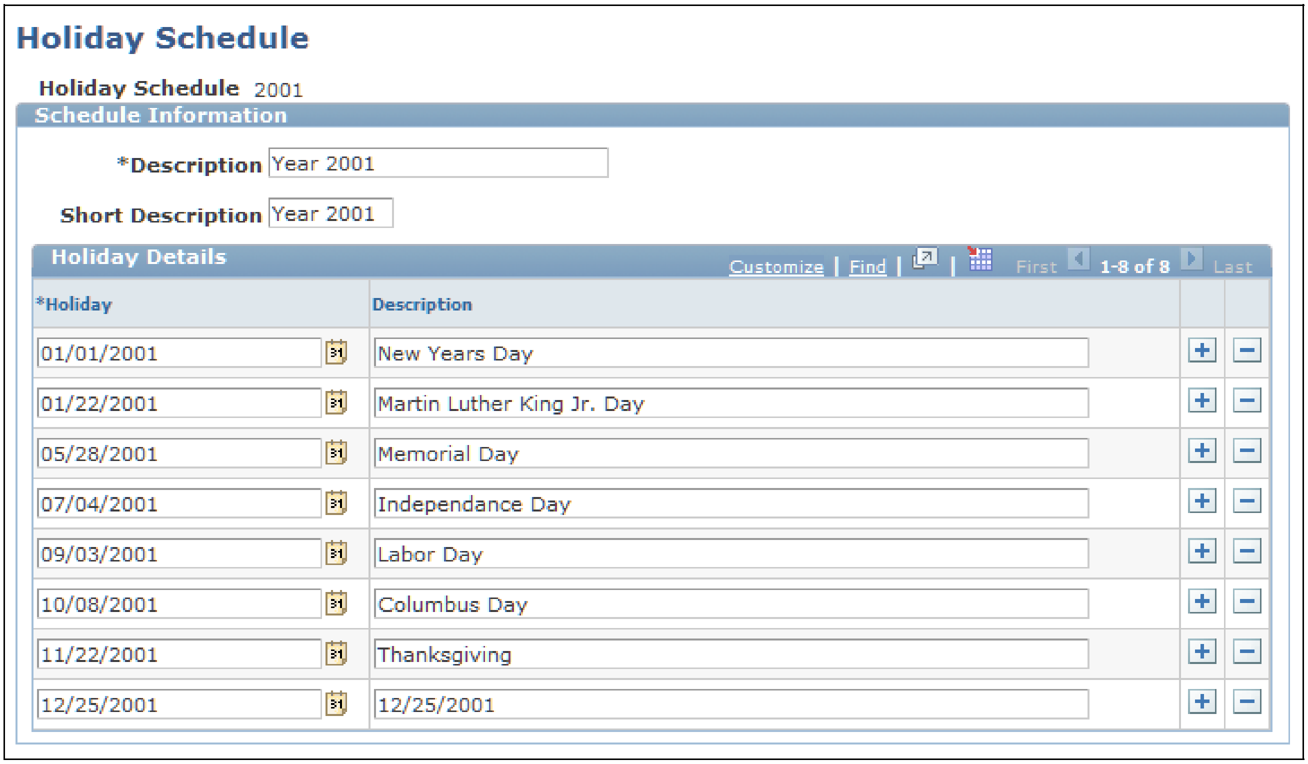
Access the Calendar Options page (Set Up CRM, Install, Installation Options, Calendar Options).

See  and Chapter 3, "Setting Up General Options," Setting Up PeopleSoft CRM Application Installation Options, page 27.

## Defining Holidays

Access the Holiday Schedule page (Set Up CRM, Common Definitions, Calendars and Schedules, Holiday Schedule, Holiday Schedule).



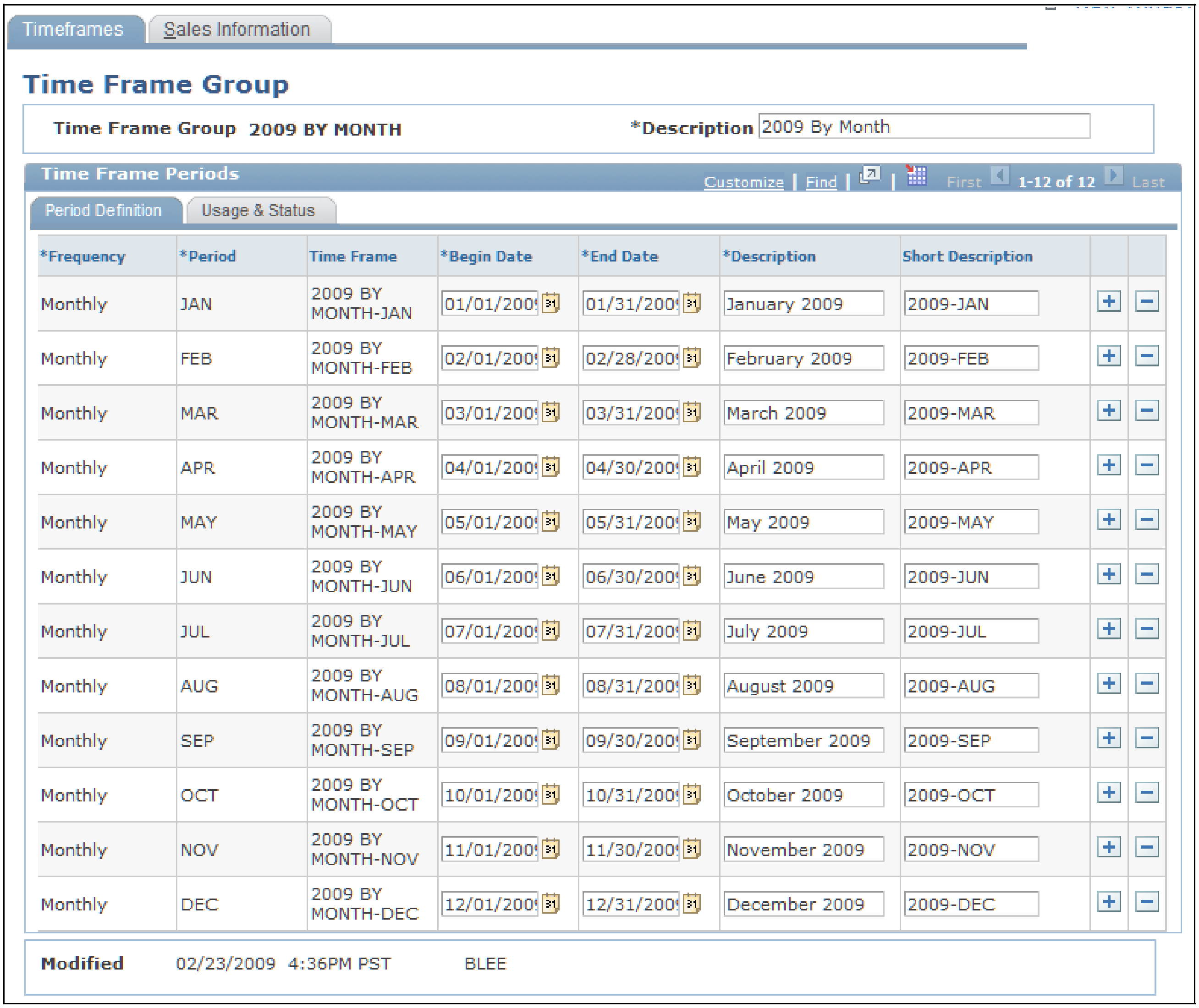

Holiday Schedule page

When you add a new date to the list of holidays, enter a description (up to 30 alphanumeric characters). This description appears on the workers' calendars.

## Define Time Frames for Forecasting, Pipeline Analysis, Planning, and Portfolio Examination

Access the Timeframes page (Set Up CRM, Common Definitions, Calendars and Schedules, Time Frames, Timeframes)



Timeframes | Sales Information

## Time Frame Group

**Time Frame Group** 2009 BY MONTH    *Description 2009 By Month

**Time Frame Periods**    Customize | Find |    First 1-12 of 12 Last

Period Definition | Usage & Status

| *Frequency | *Period | Time Frame | *Begin Date | *End Date | *Description | Short Description |
|---|---|---|---|---|---|---|
| Monthly | JAN | 2009 BY MONTH-JAN | 01/01/200 | 01/31/200 | January 2009 | 2009-JAN |
| Monthly | FEB | 2009 BY MONTH-FEB | 02/01/200 | 02/28/200 | February 2009 | 2009-FEB |
| Monthly | MAR | 2009 BY MONTH-MAR | 03/01/200 | 03/31/200 | March 2009 | 2009-MAR |
| Monthly | APR | 2009 BY MONTH-APR | 04/01/200 | 04/30/200 | April 2009 | 2009-APR |
| Monthly | MAY | 2009 BY MONTH-MAY | 05/01/200 | 05/31/200 | May 2009 | 2009-MAY |
| Monthly | JUN | 2009 BY MONTH-JUN | 06/01/200 | 06/30/200 | June 2009 | 2009-JUN |
| Monthly | JUL | 2009 BY MONTH-JUL | 07/01/200 | 07/31/200 | July 2009 | 2009-JUL |
| Monthly | AUG | 2009 BY MONTH-AUG | 08/01/200 | 08/31/200 | August 2009 | 2009-AUG |
| Monthly | SEP | 2009 BY MONTH-SEP | 09/01/200 | 09/30/200 | September 2009 | 2009-SEP |
| Monthly | OCT | 2009 BY MONTH-OCT | 10/01/200 | 10/31/200 | October 2009 | 2009-OCT |
| Monthly | NOV | 2009 BY MONTH-NOV | 11/01/200 | 11/30/200 | November 2009 | 2009-NOV |
| Monthly | DEC | 2009 BY MONTH-DEC | 12/01/200 | 12/31/200 | December 2009 | 2009-DEC |

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Timeframes page

### *Period Definition Tab*

Select the Period Definition tab.

Select the period (for example, annual, daily, monthly quarterly, and so on) for the time frame.

Enter a description of the period (for example, Q1, 2005 FY, and so on). The Time Frame field uses the name that you enter for the time frame and the text that you enter in the Period field to enter a description of the time frame.

Select the begin and end dates and then enter a long and short description for the period.

### *Usage and Status Tab*

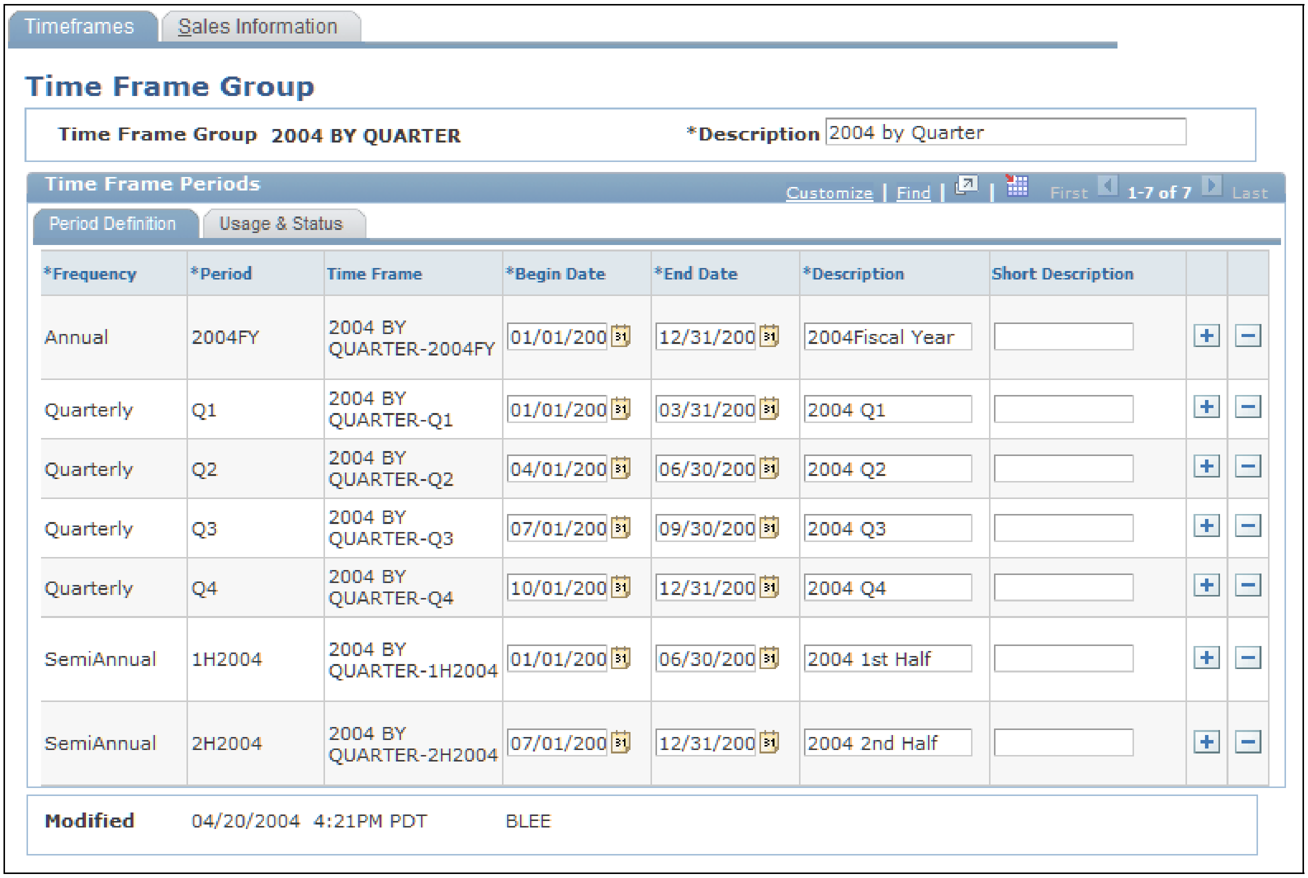
Select the Usage and Status tab.

Use the Period Use field to indicate how you plan to use the information generated in the time frame that you are defining. You can select either *All*, *Pipeline Only*, *Forecast and Pipeline*, and *Planning and Portfolio.* Use the Status field to indicate the status of the usage for the time frame.

## Define Time Frames for Sales Quota Rollups

Access the Sales Information page (Set Up CRM, Common Definitions, Calendars and Schedules, Time Frames, Sales Information).




Sales Information page

After you enter the time frames on the Timeframes page and save it, select the Sales Information tab and enter quota information for the time frame group that is being defined.

### *Quota Information*

Use the fields in this group box to define sales quotas by period definition (for example, annual, biweekly, daily, monthly, and so on). You can also use the Define Detailed Quotas option to define revenue details by business unit, product, product group, industry, region, revenue type, and territory.

### *Quota Rollup Tab*

Select the Quota Rollup tab.

Use the Quota Rollup Period field to select the time period that the period should roll up to for reporting or forecasting reasons.

For example, suppose that you are entering monthly time frames based on a quarterly reporting system, the April, May and June periods should roll up to the 2nd quarter rollup period.

## Associating Provider Groups with Holiday Schedules

Specify the appropriate holiday schedule on the Schedule page under Workforce, Provider Groups, Schedule.

The assignment engine checks the holiday schedule and hours of operation that you define for a provider group to determine whether an eligible provider group is available for assignment to a service order or case.

### *See Also*

Chapter 12, "Setting Up and Maintaining Provider Groups and Group Members," Defining Schedules for Provider Groups, page 205

## Associating Workers with Holiday Schedules

Associate workers with the appropriate holiday schedule on the Job Detail page under Workforce, Worker, Job Detail.

When you select a holiday schedule for a worker, the system updates the worker's calendar to reflect the selected holiday schedule when you save the record. If you don't select a holiday schedule for a worker, no holidays are reflected on the worker's calendar.

**Note.** If you change a worker's holiday schedule on the Job Detail page, when a user saves the page, the system deletes all existing holidays on the worker's calendar and records the holidays of the new schedule starting from the beginning of the calendar year.

### *See Also*

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Workers," Defining Job Assignment Criteria

## Updating Workers' Calendars with Specified Holiday Schedules

This section discusses how to update workers' calendars with specified holiday schedules.

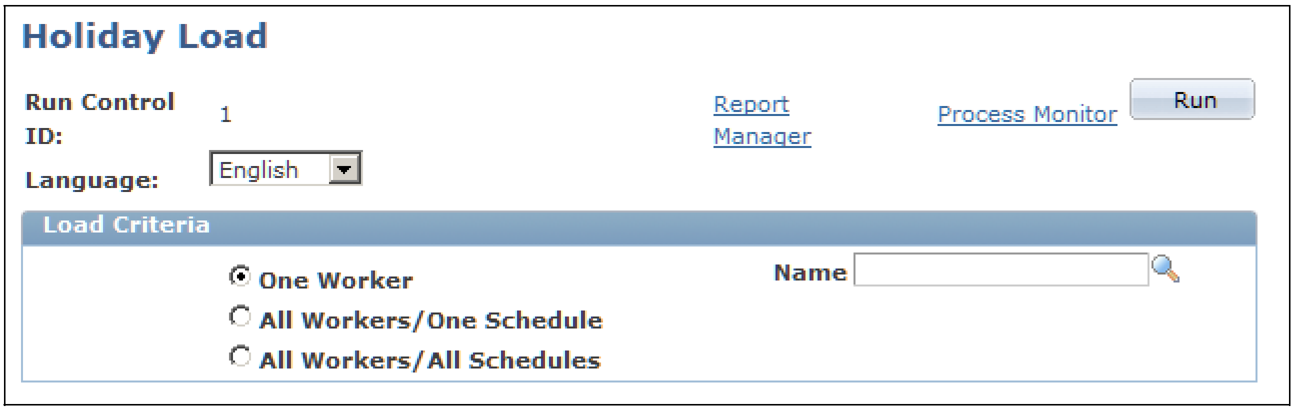
 

## Page Used to Update Workers' Calendars with Specified Holiday Schedules

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Holiday Load | RUN_CNTL_RF1000 | Workforce, Load Holidays, Holiday Load | Update workers' calendars with specified holiday schedules. |

## Updating Workers' Calendars with Specified Holiday Schedules

Access the Holiday Load page (Workforce, Load Holidays, Holiday Load).




Holiday Load page

You should maintain one holiday schedule per region or per segment of your workforce and periodically add new dates to each holiday schedule to reflect the next year's official holidays. When you add additional dates to the holiday schedules that you define with the Holiday Schedule page, run the Load Holiday process (RF_HOLIDAY).

For example, you might define next year's holidays in the last quarter of this year. After defining the holiday dates for the coming year, run the Load Holiday process to have the system record the new dates on workers' calendars.

**Note.** When you run the Load Holiday process, the system updates workers' calendars to reflect the changes in the associated holiday schedule from the current date forward. If you delete a holiday for a date prior to the current date, the system does not delete the past holiday from the calendars. However, if you delete or add a holiday for a future date, the system updates calendars to reflect the holiday schedule changes.

### *Load Criteria*

The Load Criteria group box indicates the parameters for the Holiday Load process. Before running the process, you must associate a holiday schedule with each worker who needs the update on the Job Detail page.

| | |
|---|---|
| **One Worker** | Select to load the holiday schedule for the worker who you specify in the Name field. The system displays the Name field after you select this option. |
| **All Workers/One Schedule** | Select to load the holiday schedule that you specify in the Holiday Schedule field for all workers who are currently defined in the system and have the specified holiday schedule. The system displays the Holiday Schedule field after you select this option. |
| **All Workers/All Schedules** | Select to load all holiday schedules that are associated with each worker in the system. |

### *See Also*

*PeopleTools 8.52: PeopleSoft Process Scheduler PeopleBook*

## Chapter 16

# Using Calendars

This section provides an overview of calendars and discusses how to:

- Set up calendars.
- Integrate calendars with third-party applications.

## Understanding Calendars

In PeopleSoft Customer Relationship Management (PeopleSoft CRM) every worker has access to their own My Calendar page to view their monthly, weekly, or daily calendars. Managers can update calendars to reflect daily tasks. In PeopleSoft Sales, system events can automatically update sales representatives' calendars to reflect leads and opportunities.

Similarly, in PeopleSoft Integrated FieldService, system events can automatically update technicians' calendars to reflect service order assignments. When suggesting eligible candidates to assign to a service order and case, the system checks for worker availability. If a worker has another task scheduled, or if the start and end times of the task are not within the worker's scheduled work hours, the system indicates that the worker is unavailable.

### *Calendars and Tasks*

The calendar is another way to view tasks. To appear in the calendar, a task must satisfy these conditions:

- The Show In Calendar check box must be selected when the task type is defined.
- The task must have a start date, start time, end date and end time.
- A task appears in the calendar of assignees or invitees only if the person accepts the task or invitation.

---

**Note.** If a calendar item is linked to a transaction (for example, company, lead, opportunity or partner) the system displays the appropriate page for that transaction when the user clicks the link for the task subject. If the task is not linked to a transaction, the system displays the Task Details page. Also, if a task spans multiple days, the system displays the task only on the start date on the calendar page.

---

### *See Also*

Chapter 14, "Setting Up and Performing Assignment Searches," page 219

*PeopleSoft Sales 9.1 PeopleBook*, "Working with Territories and Assignment Groups"

Chapter 23, "Working with Tasks," page 423

# Setting Up Calendars

This section discusses how to:

- View daily calendars.
- View weekly calendars.
- View monthly calendars.

## Common Elements Used in this Section

| | |
|---|---|
| **Daily** | Click this toolbar button to go to the daily calendar page. |
| **Weekly** | Click this toolbar button to go to the weekly calendar page. |
| **Monthly** | Click this toolbar button to go to the monthly calendar page. |
| **View Another's Calendar** | Click this link to go to the Another's Calendar search page to view calendars of other workers. Depending on how you implement security, a worker may not be able to view the calendars of other workers. It is more typical for managers to use this link to view the calendars of the people that report to them. |
| **View My Team's Calendar** | Click this link to view the calendar for your sales team. |
| **View Provider Group's Calendar** | Click this link to view the calendar for any provider group to which you belong. Only tasks that are associated to the provider group (not just owned by an individual provider group member) will be displayed on the calendar.<br>This will only be displayed if the current user is a member of one or more provider groups. |
| **Add Task** | Click this toolbar button to access the Task Details page and add task entries. For specific information on adding task entries refer to the section on Managing Tasks.<br>See  and Chapter 23, "Working with Tasks," Managing Tasks, page 435. |

**Calendar Item Entry** Click this link to go to the page that displays the calendar item. This could be a service order, case, lead, opportunity, or the Task Details page where a user can view and change meeting times, appointments, scheduled phone calls, reminders, and to do items.

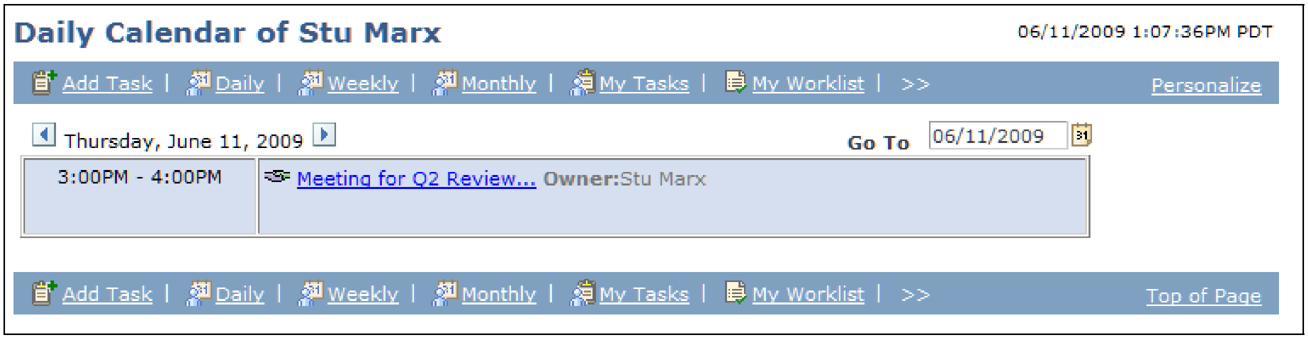
## Pages Used to Set Up Calendars

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Daily Calendar | RB_TSK_CALENDAR | • Click the Daily Calendar button next to the worker's name on the dispatch board in PeopleSoft FieldService.<br>• Click the gray bar that represents a task for a worker on the dispatch board in PeopleSoft FieldService.<br>• Click a day on the Monthly Calendar or Weekly Calendar page. | View a worker's daily calendar. |
| Weekly Calendar | RB_TSK_CALENDAR | Click the Weekly Calendar toolbar button on the Daily Calendar or Monthly Calendar page. | View a worker's weekly calendar. |
| Monthly Calendar | RB_TSK_CALENDAR | Click Monthly Calendar toolbar button on the Daily Calendar or Weekly Calendar page. | View a worker's monthly calendar. |
| My Tasks - User Options | RB_TSK_PREF_SEC | My Tasks<br>Click the Options button on the toolbar in the My Tasks component. | Set the default calendar view (daily, weekly, or monthly) and delegate tasks to others for a period of time.<br>See Link to Task Management chapter - Setting Task Defaults |

## Viewing Daily Calendars

Access the Daily Calendar page (click on My Tasks or click on the Daily Calendar button next to the worker's name on the dispatch board in PeopleSoft FieldService).




Daily Calendar page

| | |
|---|---|
| **Go To** | Displays the date for the events appearing on the calendar. To view different days, enter a new date, select a new date using the Choose a date button or use the Next Day and Previous Day arrows. |
|  | Click the Choose a date button to access the Daily Calendar page for another date. |
| **Daily, Weekly,** or **Monthly** | Click any one of these buttons to get a different view of the currently displayed calendar. |
| **View My Calendar,View Another's Calendar, View My Team's Calendar,View Provider Group's Calendar** | Click any of these links to view the specified calendar. |

### *See Also*

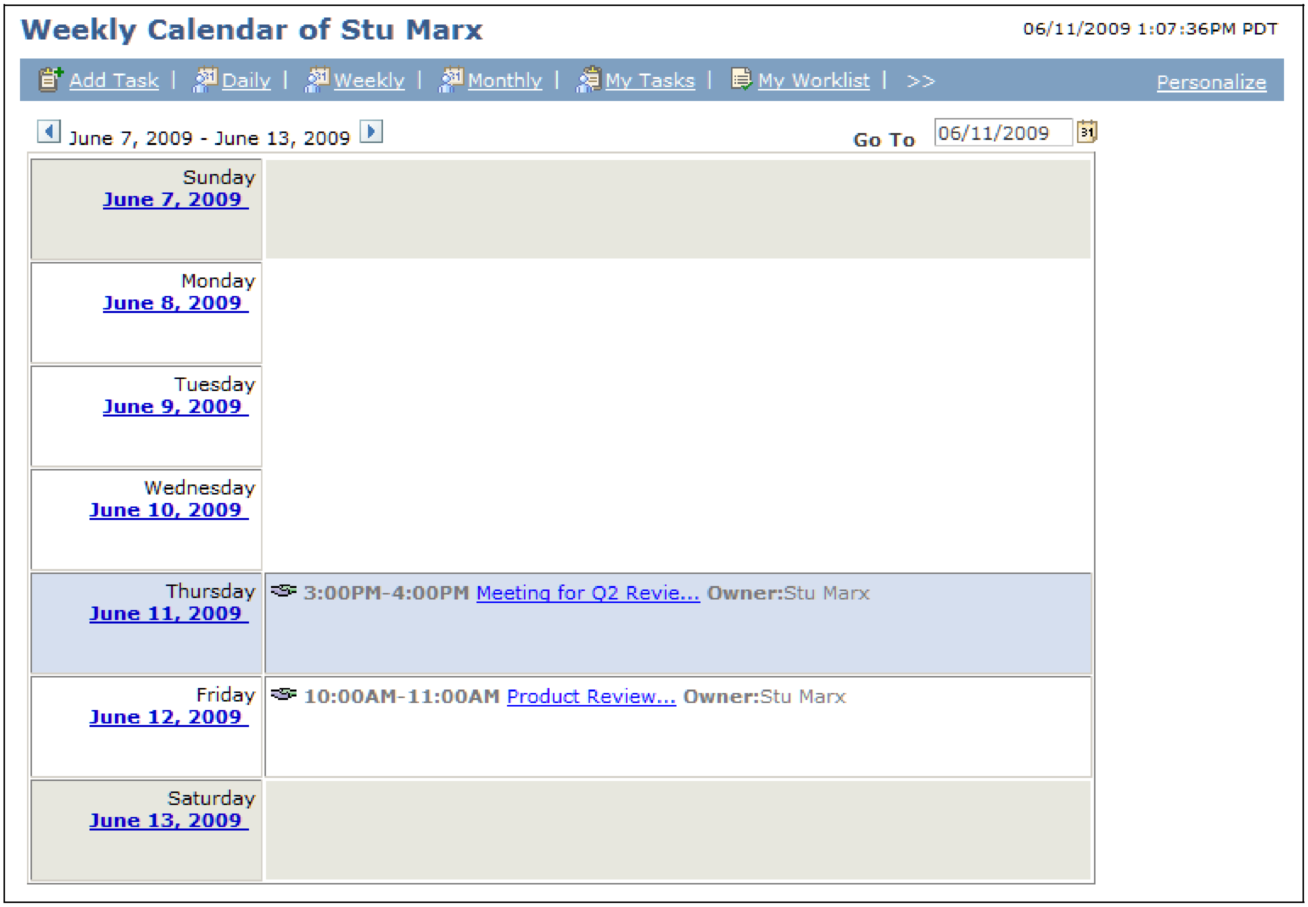
*PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Creating and Managing Service Orders"

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

## Viewing Weekly Calendars

Access the Weekly Calendar page (click Weekly Calendar toolbar button on the Daily Calendar or Monthly Calendar page).




Weekly Calendar page

**Go To**

Displays the current date. To display a new calendar enter a new date, select a new date using the Choose a date button or use the Next Week and Previous Week arrows.

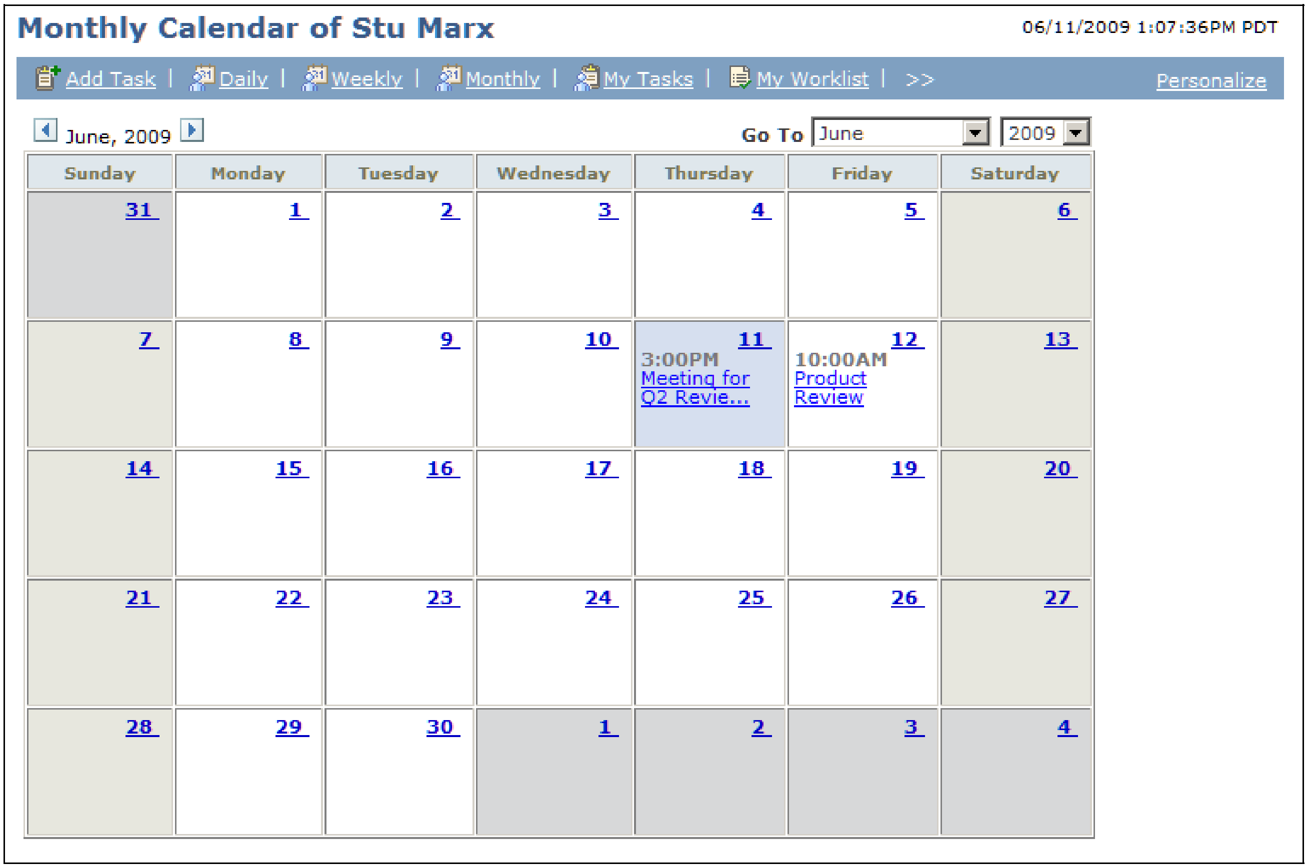
Click the Choose a date button to access the calendar page for another date.

**Note.** You can also click the link under the day of the week to go to the worker's daily calendar for that day.

## Viewing Monthly Calendars

Access the Monthly Calendar page (click Monthly Calendar toolbar button on the Daily Calendar or Weekly Calendar page).




Monthly Calendar page

**Go To**

Displays the month and year for the events appearing on the calendar. Select a new month and year to go to a different calendar for the worker. To access a calendar for a different month, click the Next Month and Previous Month arrows.

---

**Note.** You can also click the link under the day of the week to access the worker's daily calendar for that day.

---

**Current Month**

Click to return to the calendar for the current month after navigating to other months or years. The system highlights the current day and displays nonwork days in light gray. This link only appears if you are not in the current month.

### *See Also*

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Workers"

# Viewing Team Calendars

This section provides an overview on team calendars and discusses how to:

- View daily team calendars.
- View weekly team calendars.
- View monthly team calendars.
- View other people's calendars.

## Understanding Team Calendars

Using team calendars, sales managers can view the calendar of their resources to evaluate their team's bandwidth to work on new leads and opportunities.

Having the functionality to view their team's calendar on a single page enables sales managers to more easily identify the specific meetings, conference calls, events and appointments that they might want to attend, which have been set up by their team members.

## Pages Used to View Team Calendars

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Daily Team Calendar | RB_TSK_CALENDAR | • Click the My Calendar link.<br>• Click the View My Team Calendars link | View the calendars of your team for a single day. |
| Weekly Team Calendar | RB_TSK_CALENDAR | Click the Weekly toolbar button on the Daily Team Calendar or Monthly Team Calendar page. | View the calendars of your team for a single week. |
| Monthly Team Calendar | RB_TSK_CALENDAR | Click the Monthly toolbar button on the Daily Team Calendar or Weekly Team Calendar page. | View the calendars of your team for a single month. |
| Another's Calendar | RB_TSK_GCAL_SRCH | Click the View Another's Calendar link on the Daily Team Calendar, Weekly Team Calendar, or Monthly Team Calendar page. | Search for and view other people's calendars. |

## Viewing Daily Team Calendars

Access the Daily Team Calendar page (click the My Calendar link to get to the My Calendar page, then click the View My Team's Calendar link).


Daily Team Calendar page

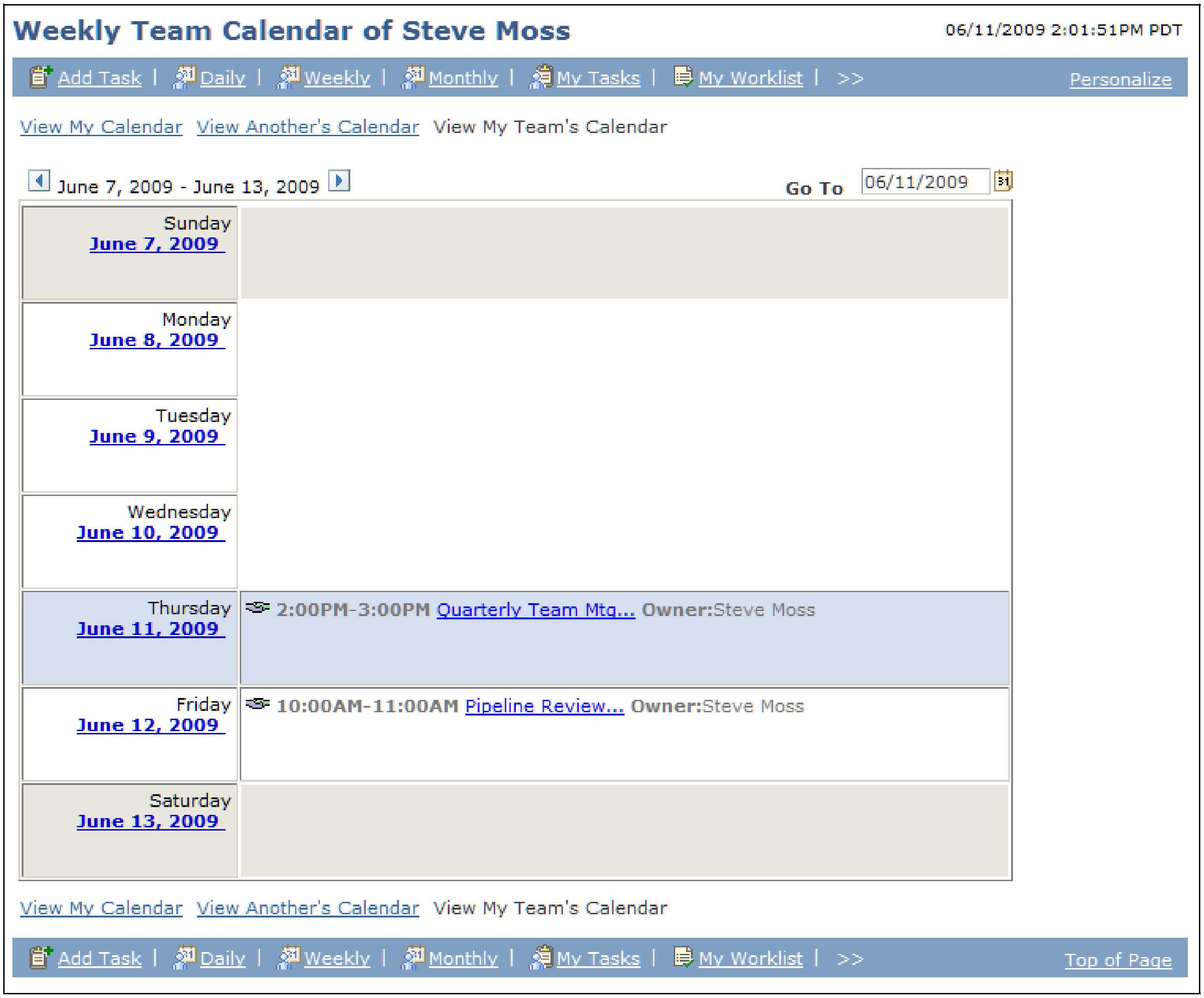
### *See Also*

Chapter 16, "Using Calendars," Viewing Daily Calendars, page 259

## Viewing Weekly Team Calendars

Access the Weekly Team Calendar page (click the Weekly link on the Daily Team Calendar or Monthly Team Calendar page).




Weekly Team Calendar page

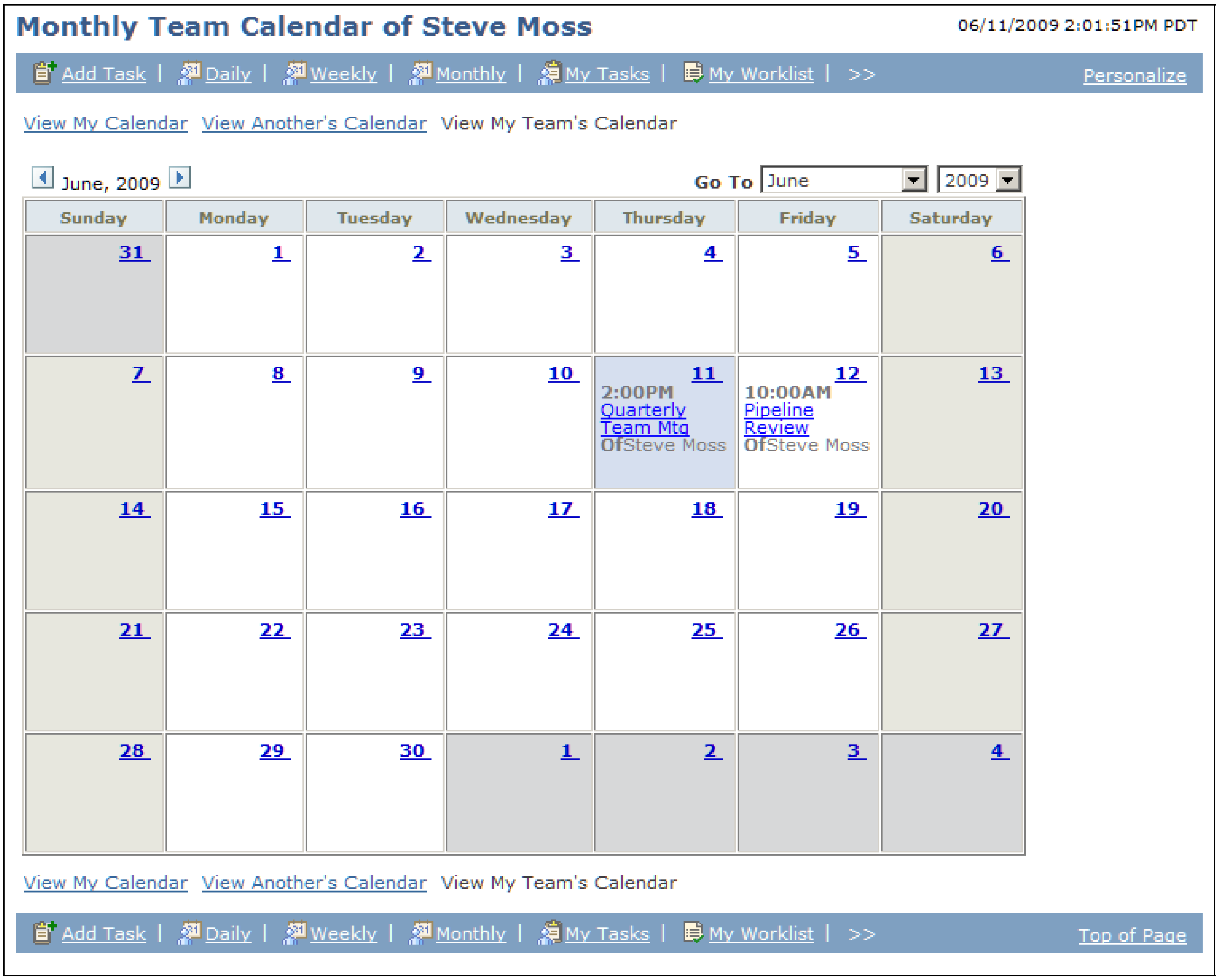
### *See Also*

Chapter 16, "Using Calendars," Viewing Weekly Calendars, page 260

## Viewing Monthly Team Calendars

Access the Monthly Team Calendar page (click the Monthly link on the Daily Team Calendar or Weekly Team Calendar page).




Monthly Team Calendar page

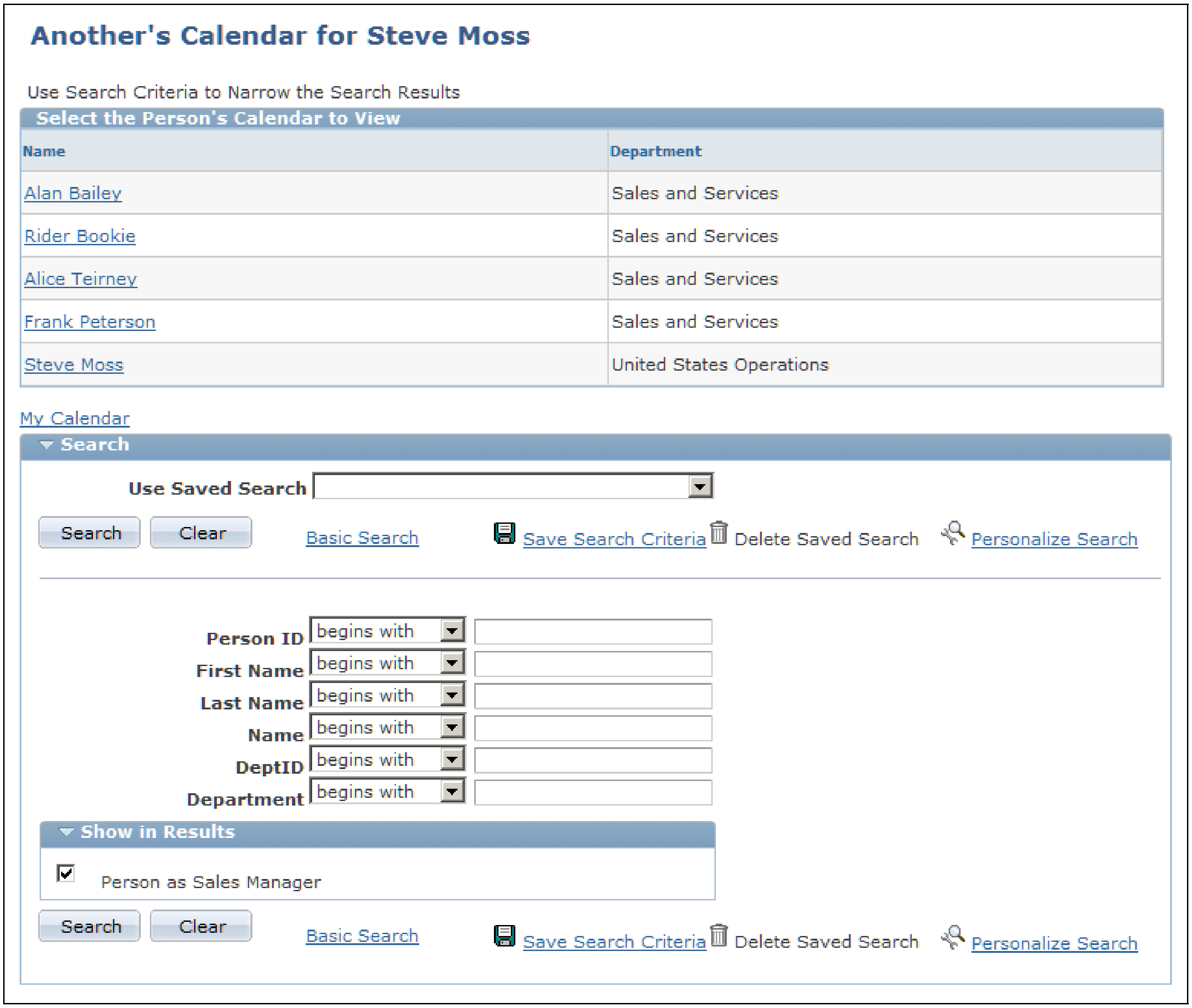
### *See Also*

Chapter 16, "Using Calendars," Viewing Monthly Calendars, page 261

## Viewing Other Peoples' Calendars

Access the Another's Calendar page (click the View Another's Calendar link on the Daily Team Calendar, Weekly Team Calendar, or Monthly Team Calendar page).




Another's Calendar page

Enter your search criteria in the fields within the Search group box and then click the search button at the bottom of the page. The system displays a list of names and their departments. Click the person's name whose calendar you want to view. The system takes you to that person's Daily Calendar page.

# Viewing Provider Group Calendars

This section provides an overview on provider group calendars and discusses how to:

- View daily provider group calendars.
- View weekly provider group calendars.
- View monthly provider group calendars.

## Understanding Provider Group Calendars

By using provider group calendars, members of a provider group can view the tasks and calendar for their group. The only tasks listed on the calendar are those that are assigned to the provider group (and whose task types are configured to display on the calendar).

See  and Chapter 23, "Working with Tasks," page 423.

## Pages Used to View Provider Group Calendars

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Daily Provider Group Calendar | RB_TSK_CALENDAR | • Click the My Calendar link.<br>• Click the View Provider Group's Calendar link | View the calendars of your provider group for a single day. |
| Weekly Provider Group Calendar | RB_TSK_CALENDAR | Click the Weekly  toolbar button on the Daily Provider Group Calendar or Monthly Provider Group's Calendar page. | View the calendars of your provider group for a single week. |
| Monthly Provider Group Calendar | RB_TSK_CALENDAR | Click the Monthly toolbar button on the Daily Provider Group Calendar or Weekly Provider Group's Calendar page. | View the calendars of your provider group for a single month. |

## Viewing Daily Provider Group Calendar

Access the Daily Provider Group Calendar page (click the View Provider Group's Calendar link from the My Calendar page).


Daily Provider Group Calendar page

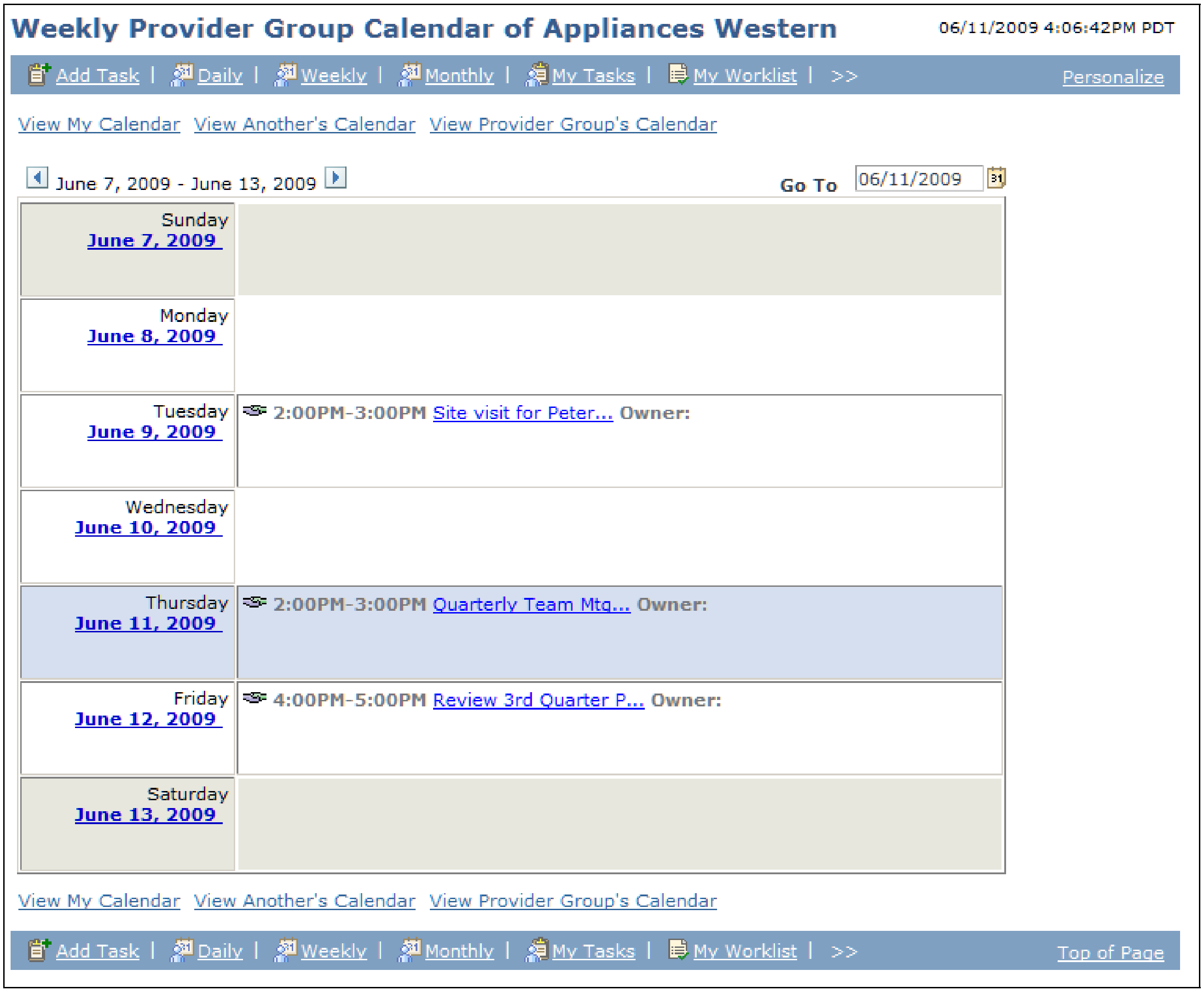
 

### See Also

Chapter 16, "Using Calendars," Viewing Daily Calendars, page 259

## Viewing Weekly Provider Group Calendars

Access the Weekly Provider Group Calendar page (click the Weekly toolbar button on the Daily Provider Group Calendar or Monthly Provider Group Calendar page).




Weekly Provider Group Calendar page

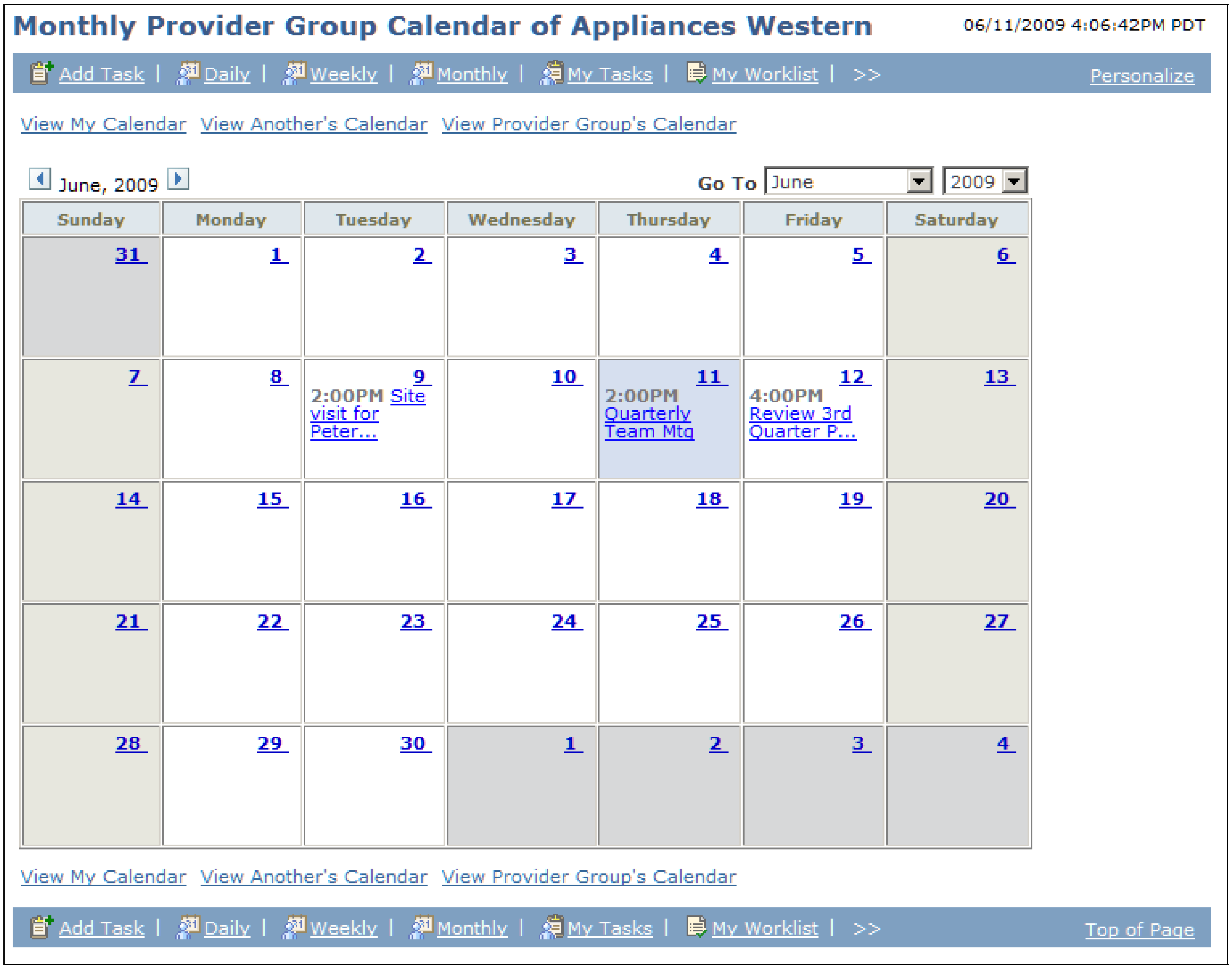
### See Also

Chapter 16, "Using Calendars," Viewing Weekly Calendars, page 260

## Viewing Monthly Provider Group Calendars

Access the Monthly Provider Group Calendar page (click the Monthly toolbar button on the Daily Provider Group Calendar or Weekly Provider Group Calendar page).




Monthly Provider Group Calendar page

### *See Also*

Chapter 16, "Using Calendars," Viewing Monthly Calendars, page 261

# Integrating Calendars with Third-Party Applications

PeopleSoft CRM delivers two enterprise integration points (EIPs)—Calendar/Task and Task Type—to integrate the calendar functionality with third-party voice recognition applications.

**Part 4**

# Interactions and 360-Degree Views



## Chapter 17

# Working with Interactions

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

- Set up interaction status.
- View interactions.

## Understanding Interactions

This section discusses:

- Interactions and subinteractions.
- Contact methods and status.
- Interaction creation.
- Interaction display.
- Interaction notes.

### Interactions and Subinteractions

Interactions are communications between you and customers or workers. At the practical level, an interaction is, essentially, a call. Tracking such communications provides valuable insight into customer- and worker-related activities.

Subinteractions are interactions that relate to a specific PeopleSoft CRM transaction (or call type), such as a lead, order, or case. In essence, subinteractions are the activities that occur during a call.Notes that are associated with an interaction are also subinteractions. A single interaction can have zero, one, or many subinteractions.

**Note.** Interactions are not created for partner communications except from the 360-Degree View page. Subinteractions are never created for partner communications.

### External Customers Versus Workers

You create different types of subinteractions depending on whether an interaction is for an external customer or a worker. In most CRM applications, customers are external to an organization. Any person or organization whose data that you manage in one of the customer or partner components (Company, Partner Company, Person, or Site) is considered an external customer. However, in PeopleSoft HelpDesk and HelpDesk for Human Resources, customers are internal people whose data you manage in the Worker component.

The Worker component enables you to manage data for help desk internal customers and for CRM staff users such as salespeople, call center agents, and field service technicians. A worker can function as either a customer or as CRM staff; therefore, the creation of a worker interaction is context-dependent. Worker interactions are created only from the context of a help desk case, an HR help desk case, or on the Worker 360-Degree View page.

For example, if you open a helpdesk case for Mark Anderson, any correspondence that you send to Mark from that case is logged as an interaction, and the case itself becomes a subinteraction. If Mark is also a customer service representative, he might receive notifications that are related to cases for other callers. These notifications are not logged as interactions because, in this context, Mark is a contact, not a customer.

### Subinteraction Types

You can create the following basic PeopleSoft CRM transactions as subinteractions of external customer interactions:

- PeopleSoft Support cases.
- PeopleSoft Sales leads.
- PeopleSoft Sales opportunities.
- All types of PeopleSoft Order Capture (collectively known as *order captures).*
- Installed products.
- PeopleSoft FieldService service orders.
- Notes.

You can create the following PeopleSoft CRM transactions as subinteractions of worker interactions:

- PeopleSoft HelpDesk cases.
- PeopleSoft HelpDesk for Human Resources cases.
- Notes.

---

**Note.** Additional types of subinteractions are available in PeopleSoft CRM industry-specific applications.

---

## Contact Methods and Status

Every interaction has an associated contact method. An interaction's contact method categorizes the interaction. It indicates the direction (inbound or outbound) of the interaction and the communication channel. Inbound interactions occur when a customer initiates the contact; outbound interactions occur when you initiate the contact. Outbound interactions can be manual (for example, when a salesperson sends correspondence to a customer) or automatic (for example, when workflow notifies a customer that a case is closed).

Many communication channels are used for both inbound and outbound communications. For example, phone, email, and paper correspondence (whether mailed or faxed) can originate internally or externally. However, the customer always initiates web-based interactions. Therefore, the Inbound Chat and Inbound Web (for web self-service) contact methods do not have any outbound counterparts.

The Interaction Detail page contains the contents of the interaction (the text of the email, correspondence, or chat), and the interaction detail type identifies that detail type. For example, the phone interaction detail type is just one type, whereas the contact methods include Phone In and Phone Out. Contact methods include both the channel and the direction of the interaction (in or out), while the interaction detail type is used mainly to control different sets of interaction statuses. There are different sets of interaction statuses for different channels and directions.

Contact Method (INTERACTION_MTHD) and Interaction Detail Type (RB_MCF_DETAIL_TYPE) are translate fields.

### *Interaction Status*

Every interaction has a status, which varies depending on the contact method. This table shows the system delivered statuses for each contact method:

| ***Contact Method*** | ***Statuses*** |
| --- | --- |
| Inbound Chat | *Accepted*,*Completed* and *Requested.*<br>See  and *PeopleSoft CRM 9.1 Multichannel Applications PeopleBook*, "Working with Multichannel Applications." |
| Inbound Email | *Assigned, Canceled, Completed, Processing, New,* and *Reassigned.*<br>See  and *PeopleSoft CRM 9.1 Multichannel Applications PeopleBook*, "Managing Email." |
| Inbound Fax/Outbound Fax | None specified. |
| Inbound Phone/Outbound Phone | *Busy, Callback, Child Answered, Completed, In Progress, No Answer,* and *Do Not Call Again.*<br>See  and Chapter 19, "Using the 360-Degree View," page 339. |

| ***Contact Method*** | ***Statuses*** |
|---|---|
| Outbound Email/Outbound Worklist Notification<br>Outbound Email includes email replies, manual notification (sent as email), and email that is sent through a correspondence request.<br>Outbound Worklist Notification refers to manual notifications that are sent as worklist entries. | *Completed*, *Cancelled*, *Failed In Delivery*, and *In Progress.*<br>See  and *PeopleSoft CRM 9.1 Multichannel Applications PeopleBook*, "Managing Email." |
| Outbound Print/Printer | *Completed*, *Cancelled*, *Failed In Delivery*, and *In Progress.* |
| Outbound SMS | *Completed*, *Cancelled*, *Failed In Delivery*, and *In Progress.* |
| Synchronized Email | *Completed.* |
| Self-Service/Inbound Web | *Completed.*<br>See  and Chapter 21, "Working with Customer Self-Service Transactions," page 369. |

An interaction's initial status depends on how the interaction is created. You can manually update statuses for interactions that you create using the 360-Degree View feature, but the system maintains statuses for other types of interactions.

## Interaction Creation

You can create interactions manually, or the system can create them automatically. This table lists the situations in which the system creates interactions:

| ***Condition*** | ***Subinteraction*** | ***Contact Method and Status Management*** |
|---|---|---|
| A user accesses a customer, partner, or worker 360-Degree View. | Created based on the user's actions in the 360-Degree View. | In the 360-Degree View, the user can see the contact method and can change it manually. The multichannel framework type is not user-selectable. In the 360-Degree View, the multichannel framework type is always *Phone.* |

| Condition | Subinteraction | Contact Method and Status Management |
|---|---|---|
| The PeopleSoft CRM Computer Telephony Interface (CTI) application uses a delivered CTI transaction to access a page in PeopleSoft CRM.<br><br>**Note.** CTI transactions that you create do not automatically create interactions or subinteractions. | Created by the system if the transaction's target page is a subinteraction-enabled object. | Contact method: Phone<br><br>Status default: *In Progress* |
| A user sends email or print correspondence using the PeopleSoft CRM correspondence management features. | Created for the object from which the correspondence was sent. | Contact method: Outbound mail<br><br>Status default: *In Progress* |
| • A user sends manual notifications as email to internal (for example, workers) and external recipients (for example, customer contacts and consumers), or as worklist entries to internal recipients.<br><br>• A user replies to an inbound email using Email Workspace (available if you license the PeopleSoft email response management system [ERMS]). | Interactions are created for the notifications. A subinteraction is created for the transaction with which each outbound email or worklist notification is associated. | Contact method: Outbound email<br><br>Status default: *In Progress* |

| ***Condition*** | ***Subinteraction*** | ***Contact Method and Status Management*** |
|---|---|---|
| The PeopleSoft ERMS processes an inbound email. | The system creates an interaction for the inbound email.<br>A subinteraction is created when a user manually associates related objects to the inbound email. If a newly received email is part of a thread, it automatically inherits its parent email's related objects and subinteractions. | Contact method: Inbound email<br>Status default: *New* |
| The system sends an automated email to a customer, partner, or worker from the context of a help desk case to a worker. Automated email is sent by AAF workflow, by business project workflow, or by the ERMS system autoresponse process to structured email.<br>**Note.** Auto - acknowledgement email sent by the ERMS system or in response to a customer's Contact Us submission does not create an interaction. | Interactions are created for AAF workflow notifications but not for business project workflow notifications.<br>No subinteractions are created.<br>A subinteraction is created by the ERMS autoresponse process if the subinteraction is associated with transactions. | Contact method: Outbound email<br>Status default: *In Progress* |
| A self-service customer or partner submits a Contact Us message.<br>The Contact Us page is available only to external customers or partners, not to workers. | The text of the message becomes the interaction note. | Contact method: Phone<br>Status default: *In Progress* |
| A customer or partner requests a chat session from the self-service Contact Us page. | None. | Contact method: Chat<br>Status: *Requested* |

| Condition | Subinteraction | Contact Method and Status Management |
|---|---|---|
| A self-service user creates a new case or updates an existing case in PeopleSoft Support, HelpDesk, or HelpDesk for Human Resources. | The case that was created or updated. | Contact method: Phone<br>Status default: *In Progress* |

To record communications that occur outside of the PeopleSoft CRM system, users can manually create interactions using the appropriate 360-Degree View. Users might manually create interactions if:

- A phone call is placed or received without the use of the CTI system.
- A letter or fax is received.
- Email is sent from outside of the PeopleSoft CRM system.
- Email is received by a mailbox that the ERMS system is not monitoring.

## Interaction Display

There are various interfaces for viewing interaction information.

### *Interactions in the 360-Degree View Pages*

PeopleSoft CRM provides 360-Degree View pages for customers, partners, and workers. There are two separate 360-Degree View pages for workers: one for PeopleSoft HelpDesk and one for HelpDesk for Human Resources. As delivered, all of the 360-Degree View pages are configured to show interactions in the dynamic grid that you create for it. You can configure a dynamic grid to display all of that interaction's subinteractions when it is expanded.

The 360-Degree View page for a customer shows all of the interactions for that customer. The Partner 360-Degree View page shows all of the interactions for the partner.

### *Other Interaction Lists*

In addition to the 360-Degree View pages, you can view lists of interactions using:

- Interaction history grids within transactional components.

  The components that you use to manage subinteraction-enabled components (including Cases, Leads, and Orders) include a grid that shows all interactions for the specific transaction.

- The Interaction List page.

  This page enables you to search for and access interactions directly from a menu (rather than from the context of a specific customer or transaction).

- The Recent Interactions pagelet.

  This pagelet displays recent interactions for a selected customer. The Recent Interactions pagelet is available with PeopleSoft CRM Portal Pack.

### *Interaction Details*

From any interaction list, you can drill into the Interaction page, where you can see the details of a specific interaction. The page that appears depends on the interaction type:

- If the interaction was created on the 360-Degree View page, the details appear on the Interaction Detail page.
- If a correspondence request created the interaction, the details appear on the Interactions - View Correspondence page.
- If the interaction is an inbound email or outbound notification (that is, a worklist entry or email other than email sent through a correspondence request), drilling into the interaction displays the details on the Email Workspace component (for inbound email) or the Outbound Notification page (for outbound notification).
- If the interaction is a chat session, the detail page shows the full chat transcript.

### *See Also*

*PeopleSoft Portal Pack 9.1 PeopleBook*, "Getting Started with PeopleSoft CRM Portal Pack"

Chapter 19, "Using the 360-Degree View," page 339

# Modifying Interaction Status

This section discusses how to modify interaction status descriptions.

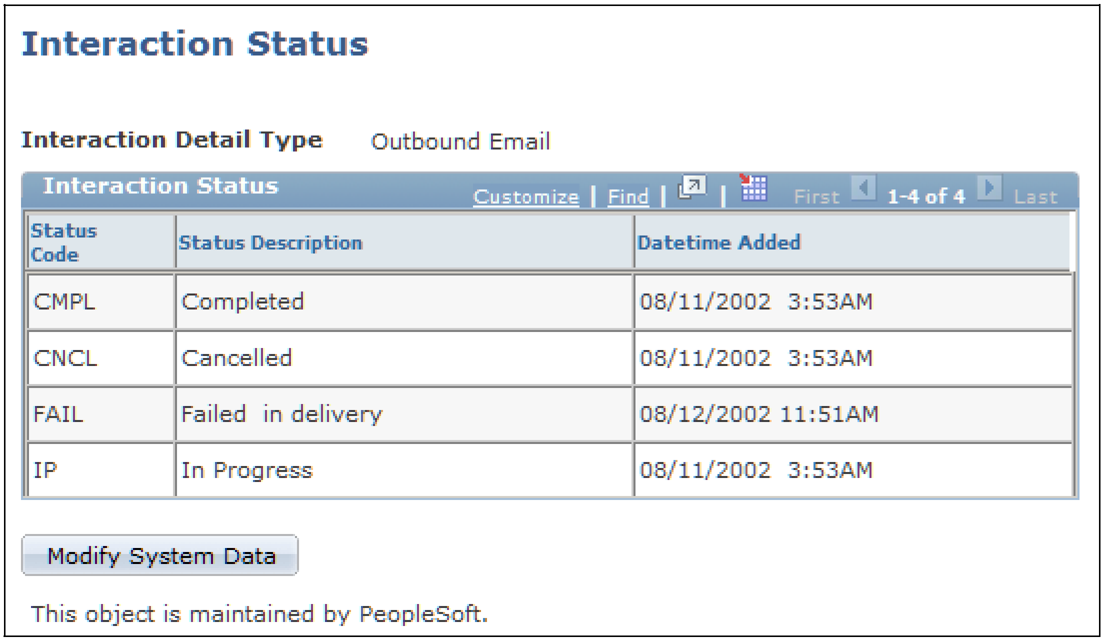
## Page Used to Set Up Interaction Status

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Interaction Status | RI_STATUS_SETUP | Set Up CRM, Common Definitions, Correspondence, Interaction Status Setup, Interaction Status | Modify interaction status descriptions. |

## Modifying Interaction Status Descriptions

Access the Interaction Status page (Set Up CRM, Common Definitions, Correspondence, Interaction Status Setup, Interaction Status).




Interaction Status page

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***Warning!*** If you change interaction statuses, you must make appropriate code changes in PeopleSoft Application Designer.

---

**Status Code** Displays the statuses that PeopleSoft CRM delivers for the interaction detail type.

# Viewing Interactions

This section discusses how to:

- Search for interactions.
- View interaction details.
- View interaction correspondence details.

## Pages Used to View Interactions

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Interaction List | RI_INTERACT_HOME | Customers CRM, Interaction List, Interaction List | Search for interactions. |

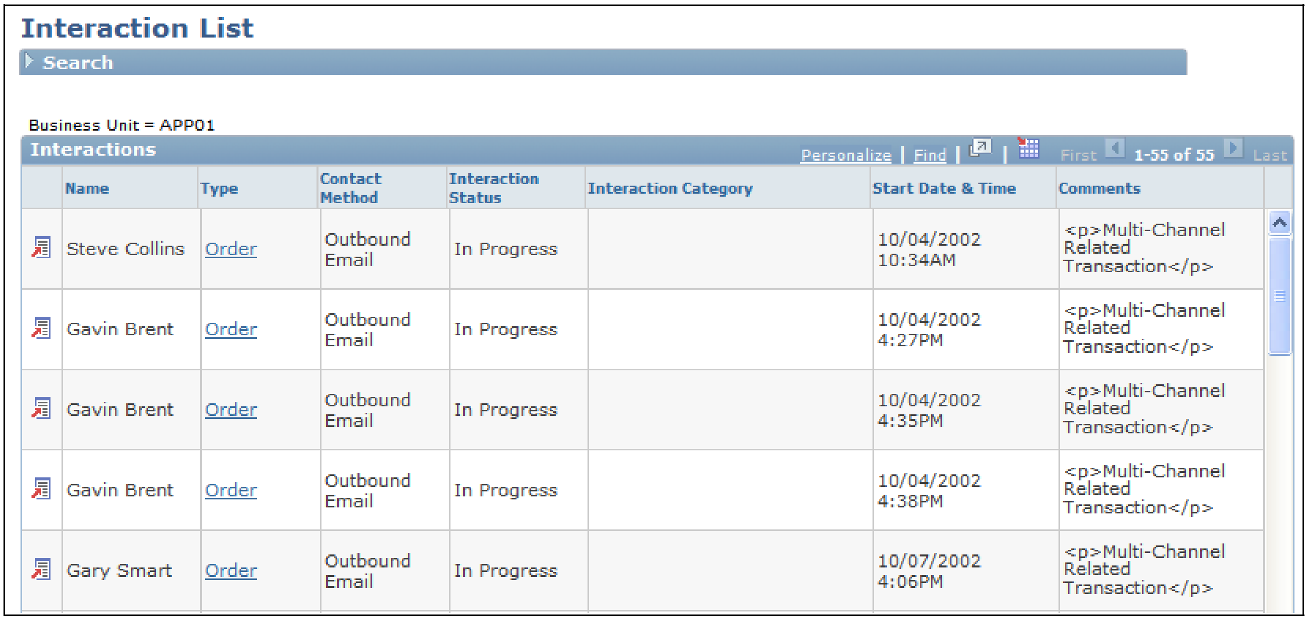
| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Interaction | RI_INTERACTION | • Click the Edit This Interaction button for an interaction that has no associated contact method on the Interaction List page.<br>• Click the Edit This Interaction button for an interaction that has no associated contact method on any 360-Degree View page.<br>• Click the Edit This Interaction button for an interaction that has no associated contact method on the Recent Interactions pagelet. | View interaction details, including a list of related subinteractions and the complete text of any interaction note. |
| Interactions - View Correspondence | RBC_RECPIENT_INQ | • Click the link for an interaction that represents correspondence on the Interaction List page.<br>• Click the link for an interaction that represents correspondence on any 360-Degree View page.<br>• Click the link for an interaction that represents correspondence on the Recent Interactions pagelet. | View interaction details for the correspondence request. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Inbound Email | RB_EM_IB | • Click the link for an interaction that represents inbound email on the Interaction List page.<br>• Click the link for an interaction that represents inbound email on any 360-Degree View page.<br>• Click the link for an interaction that represents inbound email on the Recent Interactions pagelet. | View interaction details of inbound email. |
| Outbound Email | RB_EM_OB | • Click the link for an interaction that represents outbound email on the Interaction List page.<br>• Click the link for an interaction that represents outbound email on any 360-Degree View page.<br>• Click the link for an interaction that represents outbound email on the Recent Interactions pagelet. | View interaction details of inbound email. |
| Chat | RB_CHAT_LOG | • Click the link for an interaction that represents chat on the Interaction List page.<br>• Click the link for an interaction that represents chat on any 360-Degree View page.<br>• Click the link for an interaction that represents chat on the Recent Interactions pagelet. | View interaction details of a chat. |

# Searching for Interactions

Access the Interaction List page (Customers CRM, Interaction List, Interaction List).




Interaction List page

Use this page to search for and view interactions by selected search criteria. You cannot add or modify interaction data on this page.

### *Search*

Use this section to define search criteria and perform searches. You can control the appearance and behavior of the interaction search by using the PeopleSoft CRM search configuration utility.

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

Note that not all search fields apply to all interaction types. For example, only interactions that are created from a 360-Degree View page have a value in the Callback Date field.

**Type** — Select a subinteraction type. The search locates interactions that have the type of subinteraction that you select. Available values depend on which PeopleSoft CRM products you have licensed.

### *Interactions*

This section displays search results and lists all subinteractions (shown in the Type column), along with their interactions.

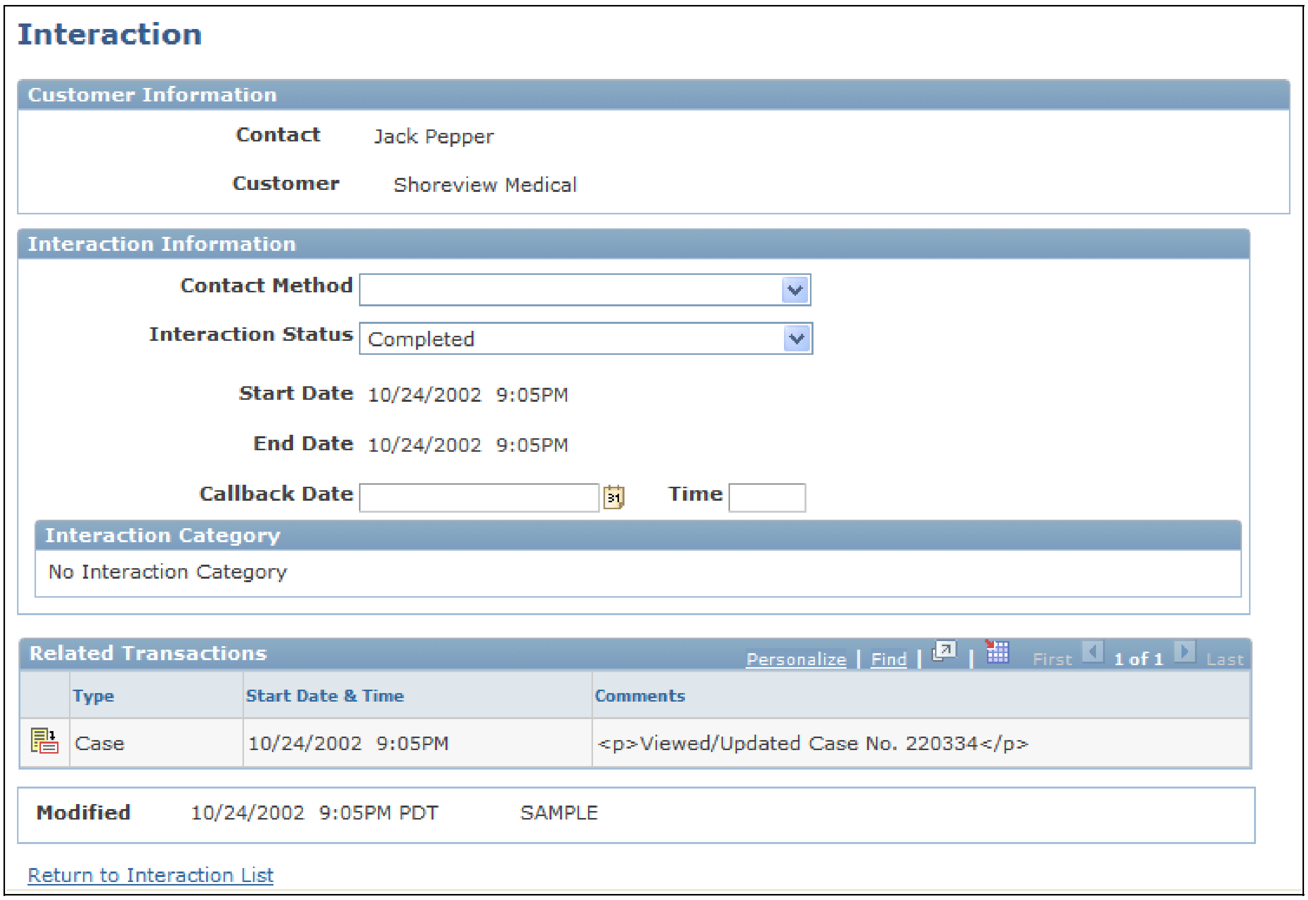
Click the Edit This Interaction button to access the Interaction page and view detailed information about the interaction. A different interaction detail page appears for each type of interaction.

**Type**

Displays links to associated subinteractions. An interaction can have more than one link. The link text is the subinteraction type—for example, *Case* or *Order*.

## Viewing Interaction Details

Access the Interaction page (click the Edit This Interaction button for an interaction that has no associated contact method on the Interaction List page).




Interaction page

### *Customer Information*

**Contact**

Displays the name of the person (company contact, partner contact, consumer, or worker) for whom you created the interaction.

### Interaction Information

The fields in this group box are identical to the fields in the Log Interaction group box on the 360-Degree View page.

See  and Chapter 19, "Using the 360-Degree View," page 339.

### Interaction Category

This section is applicable to interactions that are created for chat, phone, and email communications. It shows the category that was selected prior to closing the associated channel of communication.

For other interactions that are not associated with categories that are specific to multichannel communications, the *No Interaction Category* message is displayed.

See  and *PeopleSoft CRM 9.1 Multichannel Applications PeopleBook*, "Working with Chat in PeopleSoft CRM," Chat Session Categorization. and *PeopleSoft CRM 9.1 Multichannel Applications PeopleBook*, "Managing Email," Reviewing Email Event History.

### Related Transactions

This grid lists any subinteractions (including notes) that are associated with the interaction.

---

**Note.** Your internal business processes determine whether users enter notes in the interaction itself or in another transaction (such as a case or lead) that was the subject of the phone call.

---

**Type**

Displays the type of subinteraction. Available values depend on which PeopleSoft CRM products you have licensed.

**Start Date & Time**

Displays the date and time that the subinteraction was created.

**Comments**

Displays the full text of the note if the type is *Note.* For other types of related transactions, this field is blank or it may contain comments such as *Added New Case* or *Multi-channel related transaction.*

### Other Page Elements

**Return to 360-Degree View**

Click this link to return to the 360-Degree View page. This link appears only if you originally accessed the Interaction page from the 360-Degree View page.

**Return to Interaction List**

Click this link to return to the Interaction List page. This link appears only if you originally accessed the Interaction page from the Interaction List page.

## Viewing Correspondence Interaction Details

Access the Interactions - View Correspondence page (click the link for an interaction that represents correspondence on the Interaction List page).

The fields on this page are identical to the similarly named fields in the Correspondence Request page.

| | |
|---|---|
| **View Entire Correspondence** | Click to view the correspondence detail in the Correspondence Request page. |

See  and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook,* "Understanding Correspondence and Notifications."

## Chapter 18

# Setting Up the 360-Degree View

This chapter provides an overview of the 360-Degree View and discusses how to:

- Define transactions for use on the 360-Degree View.
- Set up the 360-Degree View tree.
- Configure the 360-Degree View.
- Configure the 360-Degree View Search page.

## Understanding the 360-Degree View

This section provides an overview of 360-Degree views in PeopleSoft CRM and discusses:

- 360-degree view integrations.
- 360-degree view search pages.
- 360-degree view system data.
- 360-degree view setup process overview.

***See Also***

Chapter 17, "Working with Interactions," page 273

Chapter 19, "Using the 360-Degree View," page 339

### 360-Degree Views in PeopleSoft CRM

The PeopleSoft CRM 360-Degree View page enables you to manage actions and interactions for a business object—a customer or contact of customer , site or contact of site, or worker. The 360-degree view provides both an entry point for interactions with the business object and a central point from which to add and search for transactions, such as agreement, installed product, defect, quote, order, case, lead, opportunity, RMA (return material authorization) and service order.

More specifically, the 360-Degree View allows the agent to:

- Access related information concerning the business relationship with the customer, partner, or worker, such as a customer's installed products and the agreement associated with each one.

- Create a supported transaction.

  The agent can return to the 360-Degree View easily using the History field from the transaction.

- View the installed product hierarchy that pertains to the customer, contact, or worker.

- View and modify product registrations.

- Create a case or access a case from the context of the customer's or worker's related information, such as a particular installed product or even from the agreement associated with that product.

- Navigate to a new case page with one object in context; for example, to transfer to a new case from the context of a customer's installed product.

- Quickly perform an action without transferring to other objects, for example, creating a service order for an installed object in the background.

- Quickly verify and change first name, last name, email address, and phone number.

- View certain country-specific information in the Job and Position Summary, Pay Summary and Benefits sections of the Human Resources Help Desk (HRHD) Worker 360-Degree view.

See *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*

The 360-Degree views that are available in PeopleSoft CRM are:

- Customer 360-Degree view.

- Partner 360-Degree view.

- Worker 360-Degree view.

- Human Resources Help Desk (HRHD) Worker 360-Degree view.

- Constituent 360-Degree view for Higher Education.

Role-specific data for a business object appears on the 360-degree view pages. The user can select a different business object role to have a different set of data appear, or search data based on date ranges that are specific to roles. Note that different 360-degree views exist for workers and customers: if an individual is both a worker and an individual consumer in your system, use the 360-degree view for the desired role to view that person's information. The worker role does not appear on the customer version and the consumer role does not appear on the worker version.

### *360-Degree View Trees*

The 360-degree view pages represent, in tree format, the business activities between the organization (through an agent) and a customer, partner, or worker. You can build trees from the highest level of the hierarchy (root node) to the lowest level of the hierarchy. Tree terminology is derived from the concept of a family tree. The root node is the *parent*, and nodes that report to it are its *children.* Nodes that have the same parent are called *siblings.* These terms refer to the relationship between nodes and are not permanent attributes of the nodes themselves. A single node can be a parent, child, and sibling all at the same time.

A tree node in the 360-Degree View tree has three parts: the node icon, the node name, and a node description. The name and description vary depending on the type of interaction. When defining the tree, you can specify an add, view all, and search node for a particular node of the tree.


Example, 360-Degree View activity tree

In the sample data, PeopleSoft CRM delivers trees specific to these CRM applications:

- Support
- Field Service
- Sales
- Marketing
- Order Capture
- Financial Services
- Insurance
- Energy
- Communication
- Government
- HelpDesk
- Higher Education (including versions for Support case, IT case, and Blended Case)

- Human Resources HelpDesk
- Partner

### Interactions

An interaction is the sum of the events that take place when a customer contacts you. It might consist of several subinteractions.

An interaction is created:

- When you click a node that is subinteraction-enabled in the 360-Degree View tree to view or change the existing transaction.
- When you perform a transaction that is subinteraction-enabled by clicking the Go button next to the Actions drop-down field on the 360-Degree View or by clicking a link in the dynamic grid.
- When you enter comments in the Note text box that appears in the Log Interaction page region and click the Save button on the 360-Degree View.
- When the 360-Degree View page appears through computer telephony integration, the system creates an interaction automatically for the phone conversation.

### Subinteractions

A subinteraction is an event in an interaction.

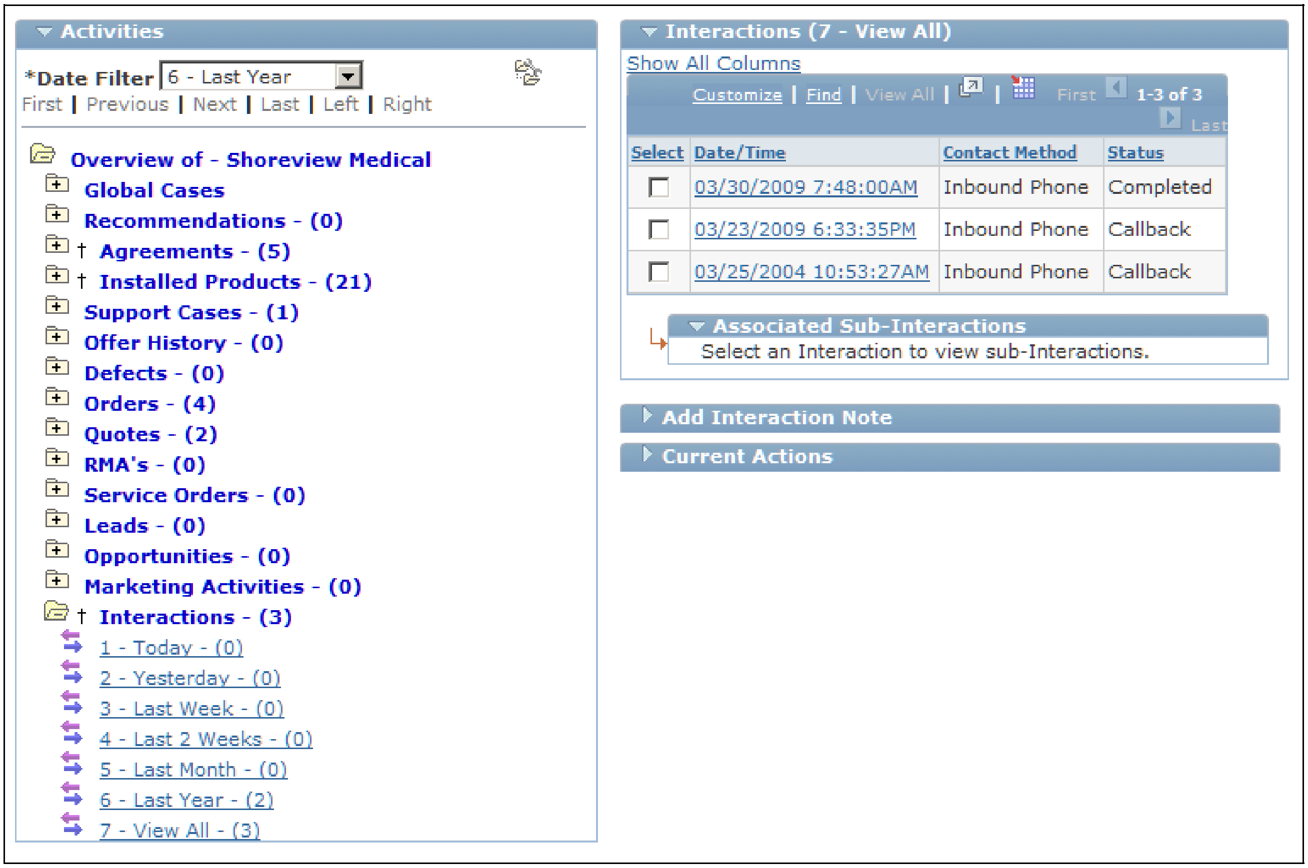
You can configure the creation of subinteractions to meet business needs. Using the Configure Role page, you can specify whether or not to capture a transaction that you initiate from the 360-degree view as a subinteraction of a node. Note that by design, not all nodes and transactions can create subinteractions.

An interaction may contain multiple subinteractions. For example, a call with a customer may involve updating a case, adding a service order, and sending a note about the customer. All of these subinteractions are logged under the same interaction.

### Interaction Nodes

This figure shows how interactions and subinteractions are represented in the 360-Degree View tree:




Interaction Node

In this example, the interaction details appear in the Dynamic grid.

### *Actions*

The 360-Degree View page that PeopleSoft delivers enables you to view or perform actions on behalf of the customer, worker, or company. The actions that you can perform appear in the Actions drop-down list on the upper right corner of the 360-Degree View page and in a similar drop-down list below the dynamic grid to the right of the Activities tree.

Actions that you can perform in the 360-Degree View include adding a case, lead, sales opportunity, sales order or quote, service order, agreement, RMA, product registration, defect, installed product and installed bundle. You can modify this set of actions using PeopleSoft CRM setup pages.

You can also perform actions on these objects from the 360-Degree View while passing on related information, or *context.* Examples of context-endowed actions are the creation of a new case for the customer's installed product. The product would be listed in the Activities tree.

### *Action Categories*

The action category specifies the method that performs the action that it is associated with. Because the action category is based on a method, it enables the action to pass contextual information while performing the action. Not only can you associate business unit and setID to the action performed, you can also pass the contents of a data record. This additional context enables you to carry product-related data forward into the underlying transaction required to serve the customer or worker. For example, you might configure an Add Case action category that identifies a customer's installed product and agreement on the new case.

The action category also defines the structure of confirmation information returned by the action that does not transfer to other components for performing the actions.

Setup involves:

- Specifying whether the action category is based on Business Unit, SetID or neither.
- Designating a record that returns the additional context, such as set control value or a Quick Code, which can be passed to the method.
- Specifying a component name and the market for Display Template. This information is useful for Actions that use Display Template.
- Defining the contents of a Confirmation message for those actions that are performed in the background.

### *Dynamic Grid*

The Dynamic grid displays details of a transaction that the agent selects in the Activities tree. It is located to the right of the Activities tree. The information displayed in the grid is configurable. You can also associate actions with the Dynamic grid, which appear in a drop-down list below it. To initiate an action, the agent selects the desired row on the grid and then selects the desired action from the drop-down list.

You can configure the Dynamic grid to display a secondary level.

Details displayed on the secondary grid are related to one of the primary grid objects. For example, you may want to display the cases entered against an installed product.

The 360-Degree View also lets you configure actions that can be performed on an object from the primary grid, enabling the agent to, for example, select an Installed Product and an Agreement and create a new case referencing these objects.

---

**Note.** For performance reasons, a maximum of 100 entries will be retrieved for display in the Dynamic Grid (even if more than that number of entries exist for the corresponding node selected from the Activities tree).

---

## 360-Degree View Integrations

360-Degree Views provide integration through EIPs to PeopleSoft Supply Chain Management (SCM) Financials, Campus Solutions, and Human Capital Management (HCM), as well as to Oracle E-Business Human Capital Management (E-Business HCM). Because E-Business HCM must run on an Oracle database, integration to this application is only available when your application utilizes an Oracle database.

When you define tree nodes, you can specify enterprise integration points (EIPs) that return data from other PeopleSoft or third-party systems. This gives you the flexibility to include any type of information in the system in the 360-Degree View tree. EIPs are predefined; use them to request information from, for example, PeopleSoft SCM Financials for invoice and payment information that is associated with a customer.

You can click a receivables transaction to view the detail in PeopleSoft SCM Financials.

---

**Note.** You must enable single sign on before you can transfer from PeopleSoft CRM to PeopleSoft SCM Financials or HCM, or to E-Business HCM.

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### See Also

*PeopleTools 8.52: Security Administration PeopleBook*

*PeopleSoft CRM 9.1 Industry Application Fundamentals PeopleBook*, "Understanding the 360-Degree View for Industries"

## 360-Degree View System Data

PeopleSoft CRM delivers predefined data for the 360-Degree View; including nodes, grid definitions, action categories, and transaction groups that are associated with nodes. You can set up 360-degree view trees that use this predefined system data. You set up additional information only if you need to change defaults. Actions are provided as sample data.

## 360-Degree View Setup Process

When you install PeopleSoft CRM, most of the necessary information is in place for you to set up the 360-degree view tree. PeopleSoft CRM delivers predefined data for the 360-degree view; including nodes, action categories, transaction groups that are associated with nodes, and grid definitions. You can set up 360-degree view trees that use this predefined system data. Set up additional information only if you need to change defaults.

To examine the predefined data, access the page where you set up that data by following the link in each step in the process below and search with no search criteria entered. The system displays a list of the predefined data that you can browse.

The general process for setting up the 360-Degree View is as follows:

1. Determine the actions that you want to be available from the 360-Degree View and whether you want them to pass context data when they are executed.

   If so, use the Action Category page to create a category that passes the data from the appropriate records. Then use the Action Definition page to associate the action with an Action Category.

   See  and Chapter 18, "Setting Up the 360-Degree View," Configuring Actions and Transactions for the 360-Degree View, page 297.

2. Use the Transaction Group page to select the transactions that appear on the 360-Degree View, depending on the customer's role.

   When configuring a role for the 360-Degree View, you specify which transaction group should apply to that role.

   See and Chapter 18, "Setting Up the 360-Degree View," Defining Transaction Groups, page 305.

3. Use the Dynamic Grid page to define a dynamic grid that lists important information from the transactions that are associated with each activity node.

   Optionally, associate an action to the grid. This will cause the display of an Action drop-down list for creating transactions associated with objects in the dynamic grid.

   See and Chapter 18, "Setting Up the 360-Degree View," Defining Dynamic Grids, page 329.

4. Use the Define Node page to define tree nodes that you can use to configure the 360-Degree View tree. Associate a dynamic grid with the node.

   When defining nodes, specify the node action and the type of node—placeholder, view, application class, or EIP.

   See and Chapter 18, "Setting Up the 360-Degree View," Defining Nodes, page 307.

5. Use the Set Up Tree page to set up the 360-Degree View tree.

   When setting up the tree, you specify the tree structure, the images that appear in the tree, its size on the page, and what transaction should appear for each node on it.

   See and Chapter 18, "Setting Up the 360-Degree View," Setting Up Trees, page 314.

6. Use the Set Up Profile page to set up the Profile group box that appears on the 360-Degree View.

   When setting up the profile, you can define the fields and buttons (as well as the buttons' actions) that appear in the Profile group box.

   See and Chapter 18, "Setting Up the 360-Degree View," Setting Up Profiles, page 321.

7. Use the Configure Role page to configure a PeopleTools role that is used to access the 360-Degree View.

   When configuring a role, specify the tree, transaction group, and profile that you want to associate with this role. Plus, determine whether you want to capture subinteractions for the transactions that are associated with the transaction group and the nodes in the tree.

   See and Chapter 18, "Setting Up the 360-Degree View," Configuring Roles, page 325.

8. (Optional) If you are implementing the PeopleSoft CRM FSI Insurance or Government applications, use the User Links page to define user links that appear on the search page that accesses the 360-Degree View.

   See and Chapter 18, "Setting Up the 360-Degree View," Defining User Links That Appear On the Search Page, page 334.

9. Use the 360 Degree Search Preferences - 360 Degree View Search Preferences page to specify the search page that you want to use to access the 360-Degree View.

   See and Chapter 18, "Setting Up the 360-Degree View," Selecting the Search Page That Is Used to Access the 360-Degree View, page 337.

# Configuring Actions and Transactions for the 360-Degree View

To configure transactions for the 360-degree view, use the Define Action (RB_TD_ACT_DFN), Define Action Category (RB_TD_ACT_CAT) and Define Transaction Group (RB_TD_TRANS_SETUP) components.

This section provides an overview of transactions in the 360-Degree View and discusses how to:

- Define action categories.
- Define an action.
- Define transaction groups.

## Understanding Actions and Transactions

The 360-Degree View page that PeopleSoft delivers enables you to view or perform transactions on behalf of the customer or company. The transactions that you can perform appear in the Action drop-down box on the upper right corner of the 360-Degree View page.

When you create a transaction, you also create an object in the system. Transactions that you can create in the 360-Degree View include case, lead, sales opportunity, sales order or quote, service order, agreement, RMA, product registration, defect, and installed product. You can modify this set of transactions by using PeopleSoft CRM setup pages.

Actions are the tasks that create the transactions. You must associate actions to a Transaction Group when configuring a transaction.

## Pages Used to Configure Actions and Transactions for the 360-Degree View

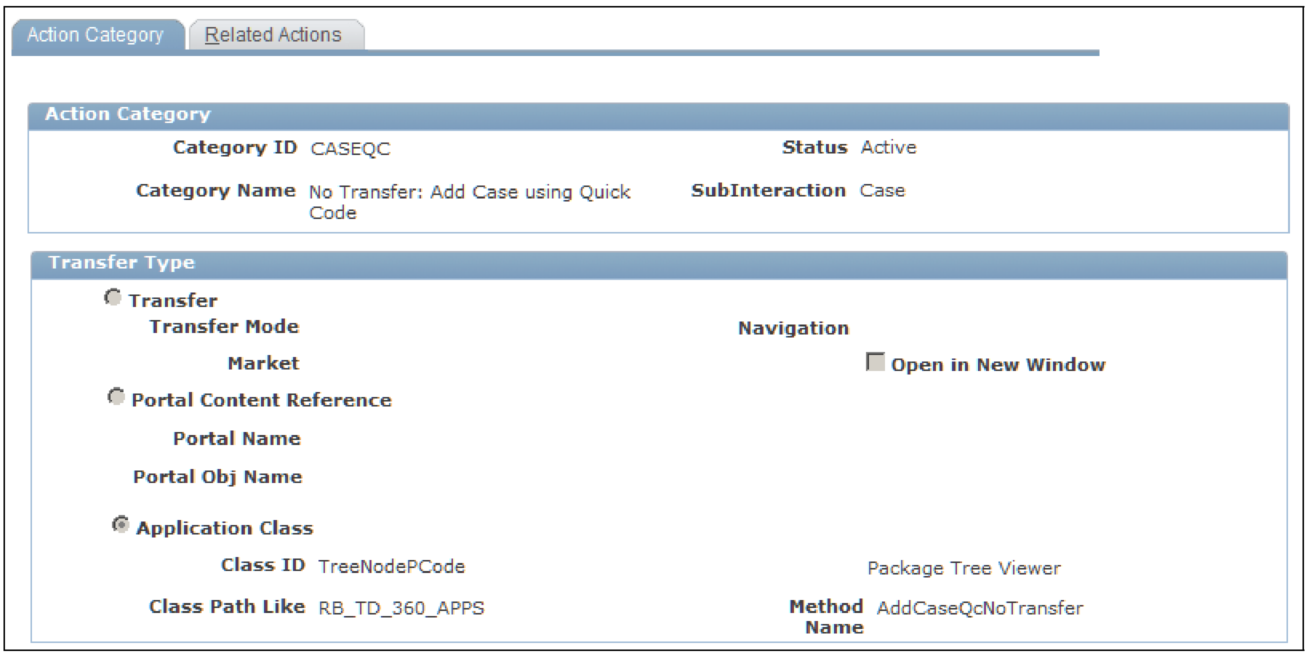
| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Action Category | RB_TD_ACT_CAT | Set Up CRM, Common Definitions, 360-Degree View, Define Action Category, Action Category | Create an action category for populating the Action drop down list. |
| Action Definition | RB_TD_ACT_DFN | Set Up CRM, Common Definitions, 360-Degree View, Define Action, Action Definition | Assign actions to Action Categories. |
| Related Dynamic Grid | RB_TD_DYNGRD_SUM | Set Up CRM, Common Definitions, 360-Degree View, Define Action, Related Dynamic Grid | View the dynamic grids that the action is associated with. |

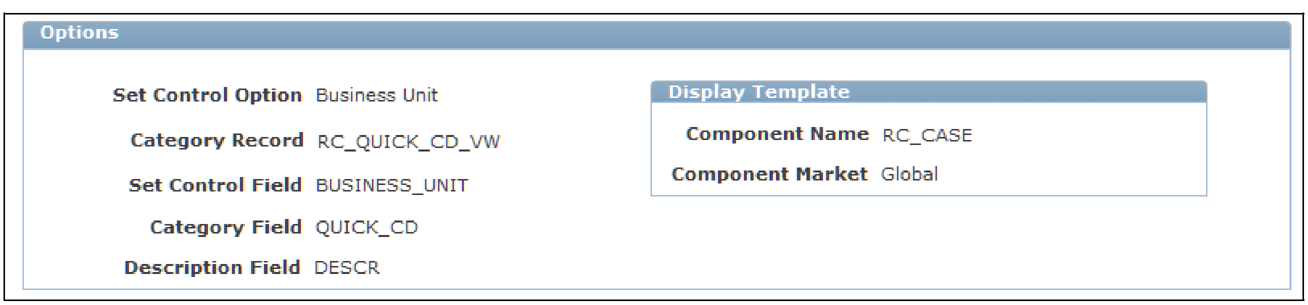
| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Transaction Group | RB_TD_TRANS_SETUP | Set Up CRM, Common Definitions, 360-Degree View, Define Transaction Group, Transaction Group | Set up transaction groups and assign actions to them. |
| Copy Transaction Group As | RB_TD_TRANS_CLONE | Set Up CRM, Common Definitions, 360-Degree View, Copy Transaction Group, Copy Transaction Group As | Clone an existing transaction group. Cloning an existing transaction group makes a copy of it. |

## Defining Action Categories

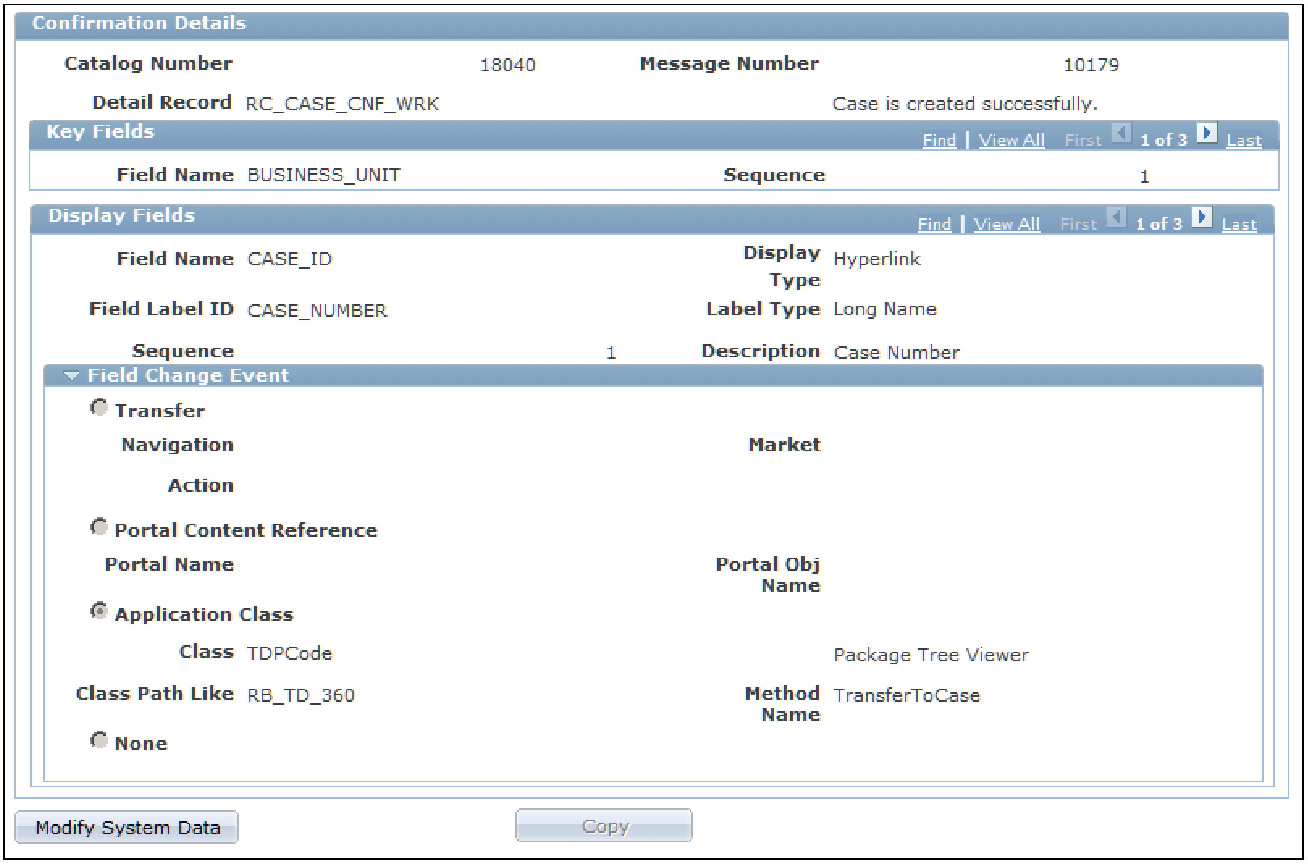
Access the Action Category page (Set Up CRM, Common Definitions, 360-Degree View, Define Action Category, Action Category).




Action Category page (1 of 3)




Action Category page (2 of 3)




Action Category page (3 of 3)

### *Action Category*

This section defines the method that will be invoked by the actions that are associated with this Action Category. It can be a Component transfer or a Portal reference or an Application Class. Action Category that requires additional context to be passed must always have an Application Class. For example, passing Quick Codes in addition to Display Template information for creating a Case.

**Status**

Defines the Action Category status; either *Active* or *Inactive.* Only action categories that are active appear in the Action drop down.

**Subinteraction**

Select a subinteraction to correspond to the Action Category. The subinteraction appears on the Subinteraction list of the associated interaction, if any.

### *Transfer Type*

**Transfer**

Select to transfer to another PeopleSoft CRM component and page. If you select Transfer, use the Component Navigation and Component Market fields to select the transaction to transfer to.

| | |
|---|---|
| **Transfer Mode** | Select the mode in which to open this page for the transaction. Values are *Add,Correction,* and *Update/Display*. |
| **Market** | Select the desired market associated with the component to which the system transfers. A component is uniquely identified by its name and its market association. You can add records for each market. |
| **Navigation** | Select the Navigation Path to the desired component page.<br>See  and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Control Values for Business Objects," Defining Component Transfer Navigation. |
| **Portal Content Reference** | Select to transfer to a PeopleSoft CRM portal page that you define. If you select Portal Content Reference, use the Portal Name and Portal Object Name fields to select the destination portal page. |
| **Application Class** | Select Application Class to specify a PeopleCode application class to control the transfer. You can click the Package Tree Viewer link to search for application classes.<br>See  and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook,* "Using Application Classes." |

### *Options*

Use the Options fields to specify data retrieval information and additional context for the category's actions as well as display options. The Display Template fields determine the display template for the component that the action transfers to (if applicable).

| | |
|---|---|
| **Set Control Option** | Select *Business Unit, Set ID* or *None* to specify the basis for tableset sharing for the action category. The default value is *None.* This is a required field. |
| **Category Record** | Select the category record that returns the additional context to be passed to the method, such as the set control value or Quick Code. |
| **Set Control Field** | Select the name of the set control field that appears in the Category Record. Available fields are determined by the Category Record selected. |
| **Category Field** | Select the category identifier field to appear in the Category Record. Available fields are determined by the Category Record selected. |
| **Description Field** | Select the description field that displays the desired text description of the action category when it is presented for selection during setup tasks. Available fields are determined by the category record selected. |
| **Display Template** | If the action requires a display template, select a component or a market, or a component *and* a market, to determine the display template to be used by the action. |

### *Confirmation Details*

Some actions transfer the system to another component. This would be typical if the user selected the Add Service Order action that requires further data entry on the Service Order page before it can be submitted. It is evident that the action was completed successfully when the 360-Degree View is replaced by the page of the component used in the action. Use the fields in the Confirmation Details group to specify how the system responds when an action that does *not* transfer the user to another component is completed.

In a confirmation, you can specify:

- Text message

  The text message is shown in the figure as the single line, "Case was successfully created."

- Action details

  Action details are the information that appears in the white panel. They are the fields defined in the Category Record. In the figure, this is the Case Number, Problem Summary, and Status fields. You can specify up to three fields.

The links are the bottom of the confirmation are not configurable.

In the page examples in this section, in which the action creates a case in the background using Quick Code, the confirmation includes a text message, the case number and summary, and a link to the case. Note that the Transfer option is not selected, as transfer is defined by the Quick Code.

---

**Note.** Before you can configure a confirmation, there must be a record in the database for storing the transaction's runtime information (the Detail Record). Records are created in Application Designer.

---

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

| | |
|---|---|
| **Catalog Number** and **Message Number** | Select the Catalog Number and Message number to display the desired text on the confirmation message. |
| **Detail Record** | Select the record that defines the structure of the confirmation message. You can display a maximum of three fields. |

### *Key Fields*

Specify search criteria for retrieving data from the Category Record. Define additional keys using the Add mode.

| | |
|---|---|
| **Field Name** | Select the name of a key field from those available for the Category Record. |
| **Sequence** | Specify the order of the key field in the search sequence. |

### *Display Fields*

Use Display Fields options to specify the fields containing the information in the Detail Record that you want to appear on the confirmation.

**Field Name** Select the name of the field whose values you want to appear in the confirmation detail (white panel). Available fields are determined by the Detail Record selected.

**Display Type** Select one of the following to indicate how the field name value is to be displayed on the confirmation:

- *Hyperlink*

  Select *Hyperlink* to enable the user to initiate the transfer by clicking on the field value text.

- *Long Translate*

  Not supported. This option is for the display of a string that contains the Long translate (XLAT) value of the field, provided the field is based on a translate table.

- *Others*

  Select this option to display the value as a read-only.

- *PushButton*

  Not supported. Select to make this field appear as a button that initiates the transfer.

- *Related Display*

  Not supported. This option is for display of a custom element.

- *Short Translate*

  Not supported. This option is for the display of a string that contains the Short translate (XLAT) value of the field, provided the field is based on a translate table.

**Field Label ID** If you want the field to be displayed by its label, select *Field Label ID.*

**Label Type** If you selected Field Label ID, specify whether to display the Long Name or Short Name for the field label.

**Sequence** Enter *1,2,* or *3* to indicate the position of the text field in relation to the other text fields.

**Description** The text description specified for the Display Field. It is not editable here.

### *Field Change Event*

This section appears if you select *Hyperlink* as the Display Type.

**Transfer** Select to transfer to another PeopleSoft CRM component and page.

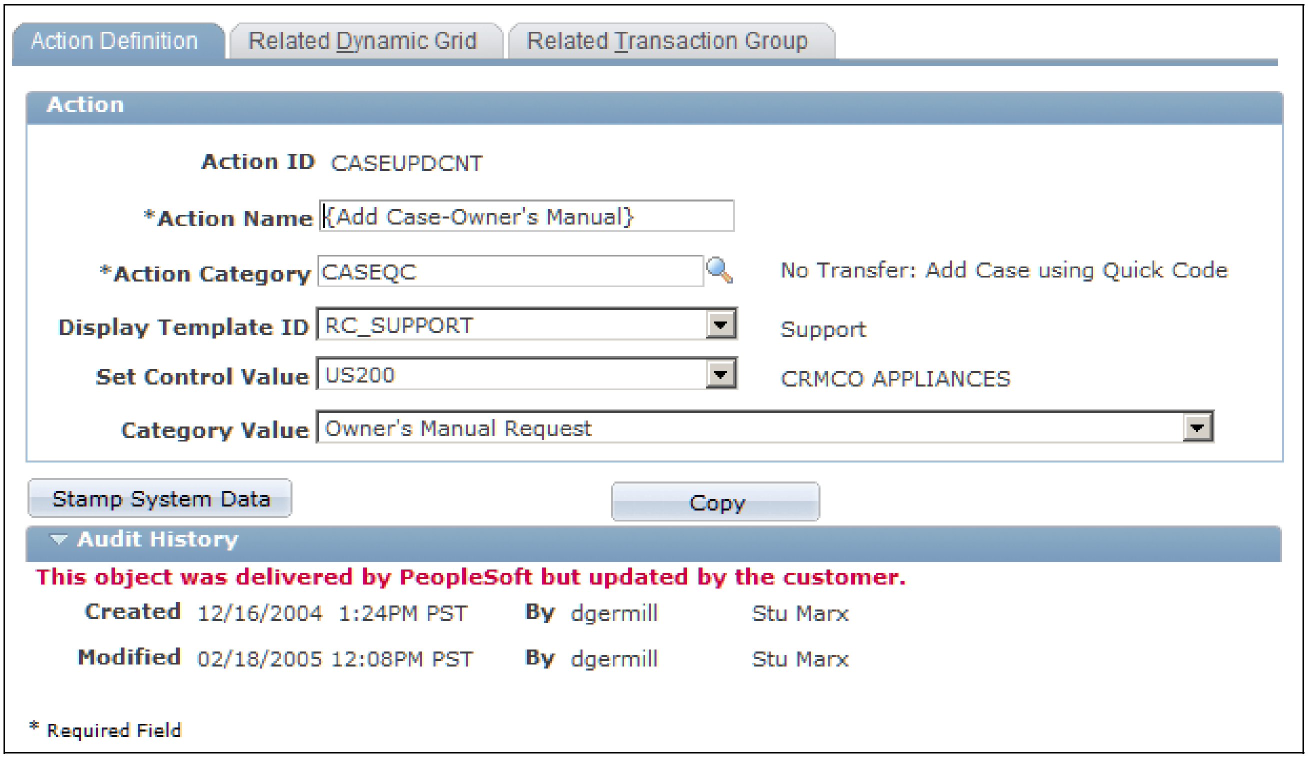
 

| | |
|---|---|
| **Navigation** | Select the navigation path to the desired component page.<br>See  and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Control Values for Business Objects," Defining Component Transfer Navigation. |
| **Market** | Select the desired market associated with the component being transferred to. A component is uniquely identified by its name and its market association. You can add records for each market. |
| **Action** | Select the mode in which to open the component page being transferred to. Values are *Add,Correction,* and *Update/Display.* |
| **Portal Content Reference** | Select to transfer to a PeopleSoft CRM portal page that you define. If you select Portal Content Reference, use the Portal Name and Portal Object Name fields to select the destination portal page. |
| **Application Class** | Select to launch an application class that controls the transfer. You can click the Package Tree Viewer link to search for application classes. |
| **Copy** | Click to clone the Action Category. Any changes you made to the original action category are then saved, and the Copy Action Category page appears. The page contains a prompt for a new action category ID. Clicking the OK button creates the cloned action category and gives it the name of the original Action Category with the prefix *Copy of.* |

## Defining an Action

Access the Action Definition page (Set Up CRM, Common Definitions, 360-Degree View, Define Action, Action Definition).




Action Definition page

| | |
|---|---|
| **Action Name** | Enter the name that you want to appear in the Actions drop down list. |
| **Action Category** | Select an action category to associate the action with. You must associate an action with an action category so that it appears on the Actions drop down list. |
| **Display Template ID** | Select a display template to be used for the action. This field is hidden if the component for display template is not defined in the action category. |
| **Set Control Value** | Select a set control value. This field is hidden if the Set Control option in the Action Category field is set to *None.* |
| **Category Value** | Select a category value. Available category values are determined by the selected set control value. |

### *Viewing an Action's Associated Transaction Groups and Dynamic Grids*

Access the Related Transaction Group and the Related Dynamic Grid pages. Actions are associated with transaction groups and dynamic grids in the Transaction Group and Dynamic Grid pages. The transaction groups and dynamic grids to which the action is associated will appear on the Related Transaction Group and Related Dynamic Grid pages for your reference. An action can be associated with no transaction groups or dynamic grids, or one, or more than one.

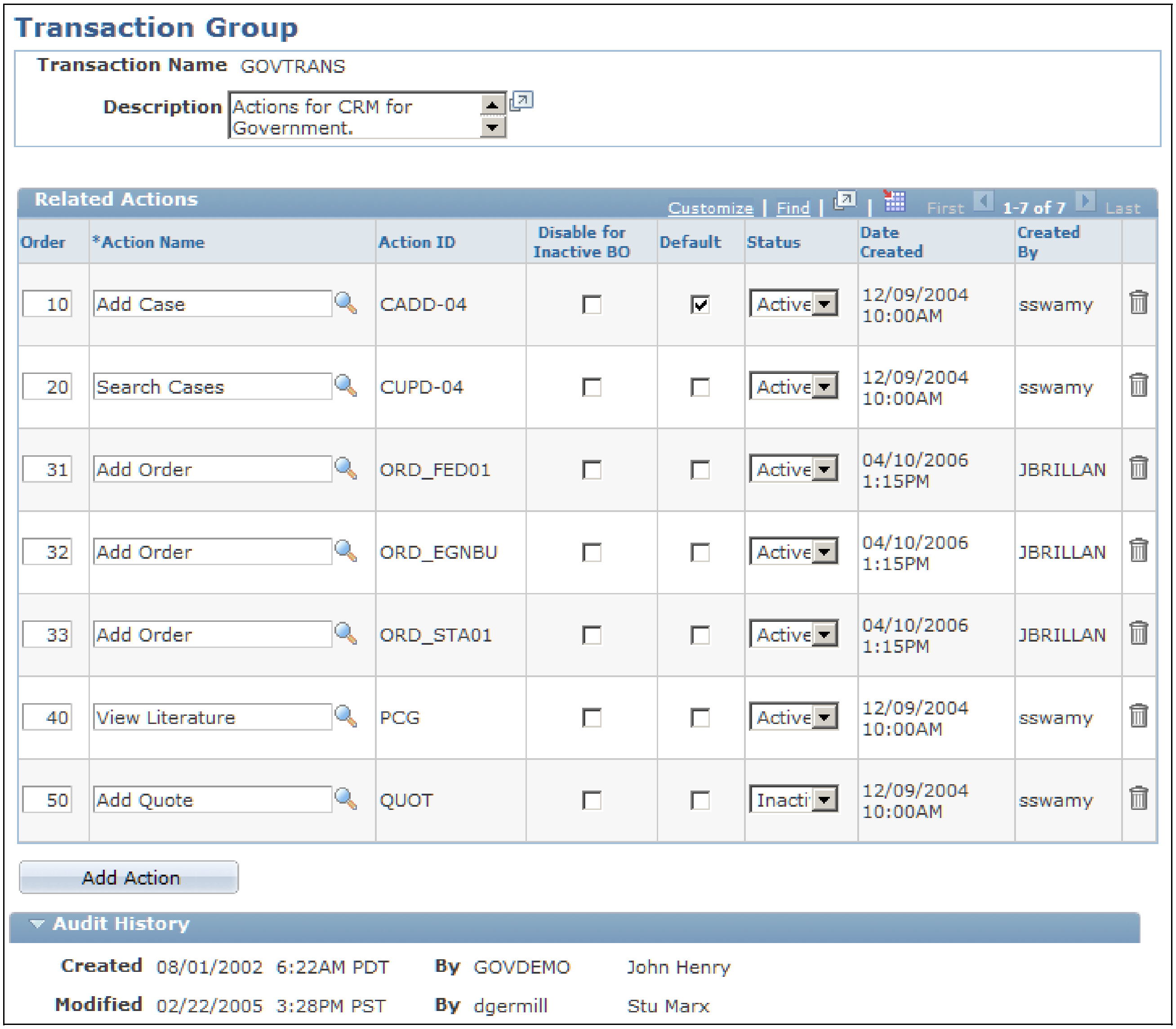
See and Chapter 18, "Setting Up the 360-Degree View," Defining Dynamic Grids, page 329.

See and Chapter 18, "Setting Up the 360-Degree View," Defining Transaction Groups, page 305.

## Defining Transaction Groups

Access the Transaction Group page (Set Up CRM, Common Definitions, 360-Degree View, Define Transaction Group, Transaction Group).




Transaction Group page

**Transaction Name** (transaction group name)
: The transaction group is the set of transactions that is available in the 360-Degree View.

### *Related Actions*

**Order**
: Specifies the order in which the Actions will be displayed in the drop-down.

| | |
|---|---|
| **Action Name** | Select an action from the list of those that are available.<br>You can insert a *separator* action to indicate actions that do not transfer the agent to another page. At run time, the separator action appears as a dotted line in the drop down list. For example, the system supplies a separator action in the Support Transaction Group. The sample action Add Case - Contact Updated will be added below this separator action.<br>Note the dotted line entry {– – – – – – – – – }. This is not an action but a text separator for the run time drop down list. As delivered, the separator divides the actions that transfer the agent to another component—the first group of actions—from those that don't. If you want to preserve this distinction, place new actions above or below the separator as appropriate. You can't delete the separator, and at run time, the user can't select it. |
| **Disable for Inactive BO** | Select to disable actions for business objects that are specified as *Inactive* on the page. A worker who is no longer employed is an example of an inactive object. |
| **Default** | Specifies the default actions for the drop-down. |
| **Status** | Specifies whether the action is *Active* or *Inactive.* The default is *Active.* Only active actions are displayed in the drop-down list box. |
| **Add Action** | Click to append a new action row to the list of related actions. |

## Setting Up the 360-Degree View Tree

To set up the 360-Degree View Tree, use the Define Node (RB_TD_NODE), Set Up Tree (RB_TD_TREE_DEFN), and Define Dynamic Grid (RB_TD_DYNGRD) components.

This section lists prerequisites and discusses how to:

- Define nodes.
- View and access trees associated with the 360-Degree View node.
- Set up trees.
- Set up nodes.
- Test trees.
- Search for and view application packages.

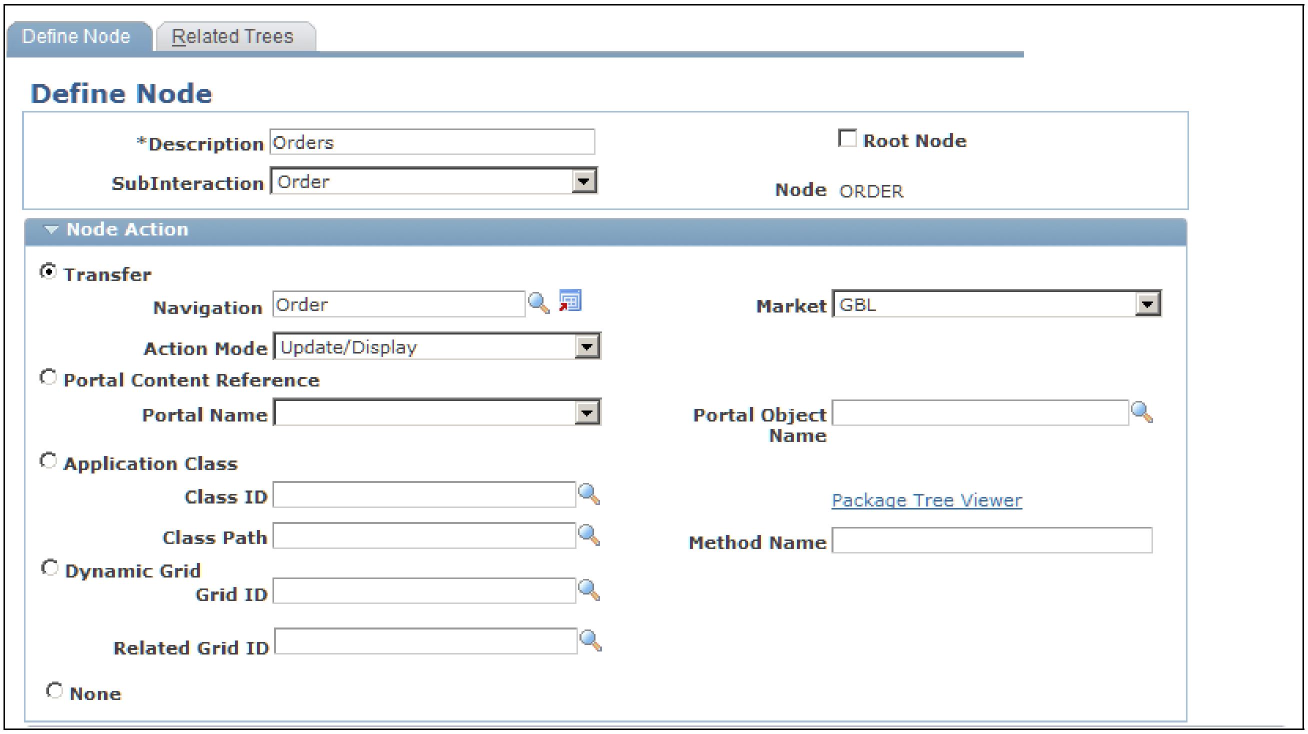
## Pages Used to Set Up the 360-Degree View Tree

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Define Node | RB_TD_NODE | Set Up CRM, Common Definitions, 360-Degree View, Define Node, Define Node | Define nodes that you can use to configure the 360-Degree View Tree. |
| Related Trees | RB_TD_NDE_RELTOTRE | Set Up CRM, Common Definitions, 360-Degree View, Define Node, Related Trees | View and access tree names that are related to the 360-Degree View node. |
| Dynamic Grid | RB_TD_DYNGRD_PG | Set Up CRM, Common Definitions, 360-Degree View, Define Dynamic Grid, Dynamic Grid | Define search criteria to associate to a node and component transfers for the grid. |
| Application Packages Lookup | RB_APPLPKG_PG1 | Click the Package Tree Viewer link on the Define Node page. | Search for and view the available application packages or classes that PeopleSoft CRM provides. |
| Set Up Tree | RB_TD_TREE_DEFN | Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Set Up Tree | Define the tree configuration (images that appear in the tree, image size, page size, and date filter). |
| Tree Node | RD_TD_TREE_NDE | Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Tree Node | Define the parent and child relationship of the tree nodes. |
| Test Your Tree | RB_TD_TREE_TEST | Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Test Your Tree | Test the 360-Degree View tree to ensure that you configured it correctly. |
| Copy Tree As | RB_TD_TREE_CLONE | Set Up CRM, Common Definitions, 360-Degree View, Copy Tree, Copy Tree As | Copy an existing tree. |

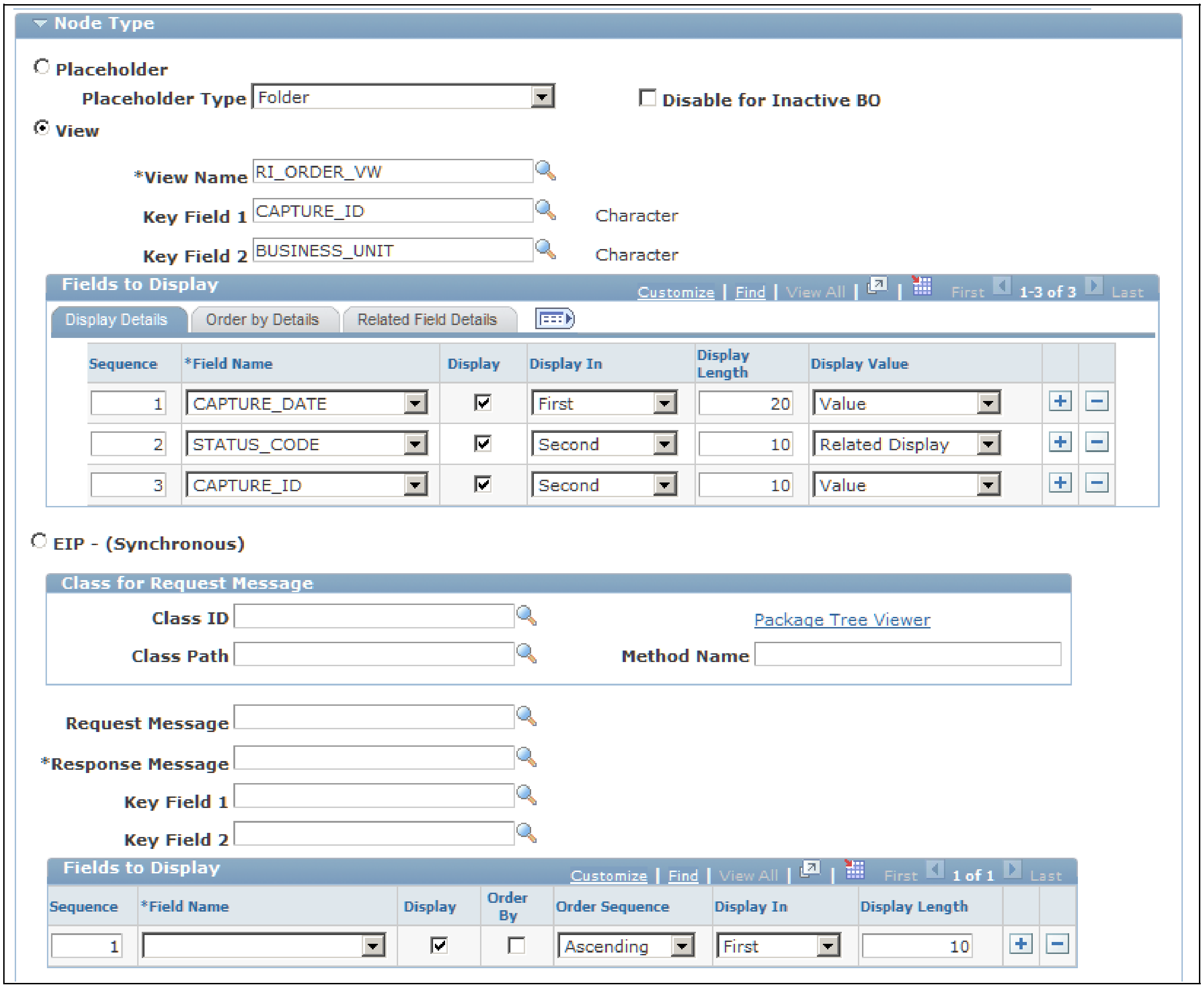
## Defining Nodes

Access the Define Node page (Set Up CRM, Common Definitions, 360-Degree View, Define Node, Define Node).

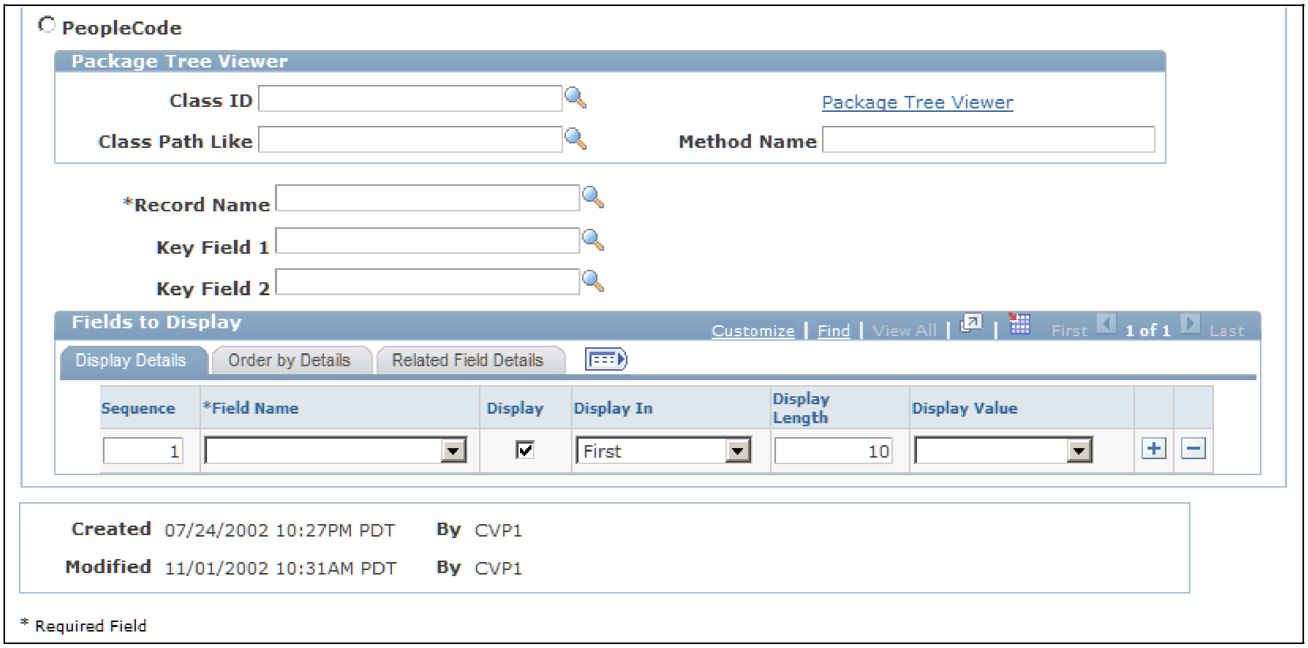
 




Define Node page (1 of 3)




Define Node page (2 of 3)




Define Node page (3 of 3)

**SubInteraction**

Select a subinteraction that corresponds to the transaction that is associated with the tree node.

**Root Node**

Select if the node that you are defining is the root node.

### *Node Action*

For each tree node, specify the node action. Node actions are:

**Transfer**

Transfers the user to a PeopleSoft CRM component and page that you define.

If you select *Transfer,* use the Navigation, Market, and Action Mode fields to select where you want the transaction to transfer.

Define the transfer fields using the Component Navigation component.

See  and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Control Values for Business Objects," Defining Component Transfer Navigation.

**Market**

Specify the name of the market with which the component is associated. A component is uniquely identified by its name and its market association. You can add records for each market, thus adding context to the node information.

**Action Mode**

Select the mode in which to open this page for the transaction. Values are *Add, Correction, Update,* and *Update/Display All.*

| | |
|---|---|
| **Portal Content Reference** | Select to transfer to a PeopleSoft CRM portal page that you define.<br>If you select Portal Content Reference, use the Portal Name and Portal Object Name fields to select the portal page to which you want to transfer. |
| **Application Class** | Select to call a PeopleSoft CRM application class.<br>If you select Application Class, use the Class ID, Class Path, and Method Name fields to enter the application class that you want the system to call. |
| **Package Tree Viewer** | Click to search for and view the available application packages that PeopleSoft CRM provides. When you click this link, the Application Packages Lookup page appears. The information that you select on this page appears on the Define Node page after you click OK. |
| **Dynamic Grid** | Click to associate a dynamic grid to the node. |
| **Grid ID** and **Related Grid ID** | Defines the name of the primary grid and its related secondary grid. Prompts display the available Dynamic grids.<br>If you have specified a Related Grid, you must select values in the fields under the No Context Selected Message, No Related Rows Found Message, and Search Fields for Related Grid sections. |
| **No Context Selected Message** | Select a message to display in the secondary grid when no rows are selected from the Dynamic grid. |
| **No Related Rows Found Message** | Select a message to display in the secondary grid when no rows are found for the selected row in the Dynamic grid. Select a message from the Message Catalog. |
| **Search Fields for Related Grid** | Click the Add Search Field button to create a grid list of the search fields that are common to the primary and secondary grids that must be used to retrieve data in secondary grid. You must specify these fields if you have a related grid. |
| **None** | Indicates that no action is associated with the node. |

### *Node Type*

The fields in this section enable you to define the node type.

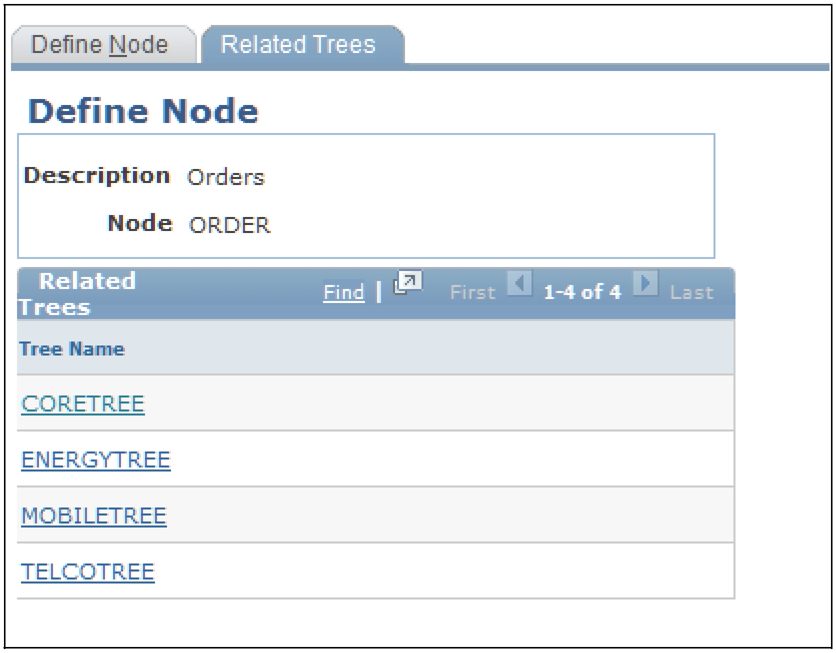
 

| | |
|---|---|
| **Placeholder** and **Placeholder Type** | Select to indicate that this node is represented as a placeholder on the 360-Degree View tree.<br>Specify the placeholder type. Values are:<br>• Add Node<br>Select to have the tree node represent an add node.<br>• Folder<br>Select to indicate that the tree node is a placeholder that is represented by a folder.<br>• Search Node<br>Select to have the tree node represent a search node.<br>• View All<br>Select to have the tree node represent a view all node. This applies only to the dynamic grid action on the node. |
| **Disable for Inactive BO** (disable for inactive business object) | Select to prevent the action from being performed on business objects that are inactive. |
| **View** | Select to define the information that appears in this node, then provide values for the following fields. |
| **View Name** | Enter the view name that is associated with this node. |
| **Key Field 1** and **Key Field 2** | Enter key fields for the view.<br>**Note.** These fields must appear as the first part of the key structure: RB_TD_360_SBR. Additionally, the view should include the RB_TD_360P_SBR and RB_AUDIT_SBR subrecords in any order. |
| **Fields to Display** | Indicate the fields that appear and the order in which the fields appear.<br>When appearing under the node of the 360-Degree View tree, view information is divided into two sections. The first section can contain 20 characters, and the second can contain 30 characters. Specify which fields you want to appear in which sections, and in what order. Also, you can specify how the information is sorted.<br>The two sections are separated by a hyphen. If two or more fields appear in one section, those field values are separated by a colon. For example, under an Orders node, you might see this information coming from a view: 2002-09-20 - Pending:d0e5061fcc. In this case, the capture date is defined for the first section, and the status code and capture ID is defined for the second section. |
| **Sequence** | Enter a number in sequence. This number defines the order in which the fields appear in the different sections for the node. |

| | |
|---|---|
| **Display** | Select to have this field appear for the node on the customer 360-Degree View tree. |
| **Display In** | Select the section in which to display this field. Values are *First, Second,* and *No Display.* |
| **Display Length** | Enter the length of the field. |
| **Display Value** | Select the value that appears for this field. Values are: *Long Translate, Related Display, Short Translate,* and *Value.*<br>If you select *Related Display,* use the Use SetID, Record Name, and Column Name fields on the Related Field Details tab to select the related field details. One of the fields of the record entered should include the selected field in the node view. If the value selected is based on setID, the node view should have a key field 2 of *SETID* or *BUSINESS_UNIT.* |
| **Order By Details** | Select for the fields by which you want to sort the information. Then use the Order Sequence field to select how you want to sort the information. Values are *Ascending* and *Descending.* |
| **EIP - (Synchronous)** | Select to indicate that the information that appears in this node is gathered from a PeopleSoft EIP.<br>If you select this option, you must specify the EIP information and define how the information is to appear on the 360-Degree View tree. |
| **Class ID, Class Path,** and **Method Name** | Enter the application class information for this EIP. The method that your assign here is used to create the request message and populate the node with the requested information. |
| **Request Message** | Enter the application request message for this EIP. |
| **Response Message, Key Field 1,** and **Key Field 2** | Enter the response application message for the EIP and its keys. |
| **PeopleCode** | Select to indicate that the information that appears in this node is gathered from executing PeopleCode<br>If you select this option, you must specify the application class ID and method name. |
| **Class ID, Class Path Like,** and **Method Name** | Enter the application class information for the PeopleCode class. |
| **Record Name** | Enter the record name that contains the data. |
| **Key Field 1** and **Key Field 2** | Enter the key fields for the record name. |
| **Fields to Display** | The group boxes for EIPs and PeopleCode is the same as the Fields to Display group box for Views. Use these fields to control how the information appears under the node of the 360-Degree View tree that is associated with an EIP. |

## Viewing and Accessing Trees Associated With the 360-Degree View Node

Access the Related Trees page (Set Up CRM, Common Definitions, 360-Degree View, Define Node, Related Trees).

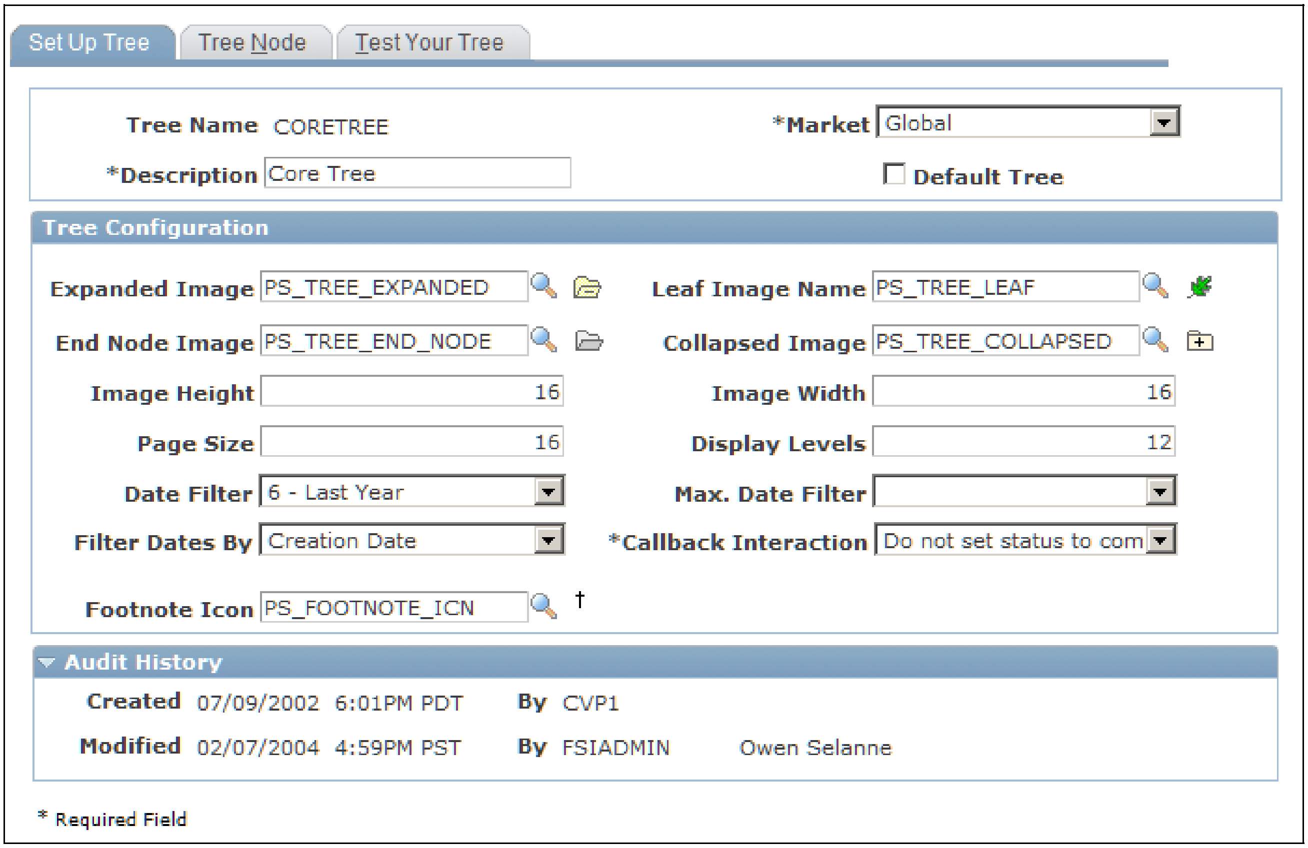



Related Trees page

Use this page to view and access the trees that are related to the node being set up for the 360-Degree View. Click the link under the Tree Name field to access the Set Up Tree page.

## Setting Up Trees

Access the Set Up Tree page (Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Set Up Tree).




Set Up Tree page

**Market**

Select the market with which to associate the tree.

**Default Tree**

Select to make this tree the default tree for the market selected above on the 360-Degree View. Select this check box to make this tree the default tree for the market selected above. This tree will then appear on the 360-Degree Views that are associated with this market. If you do not make this tree the default, the user might not be able to see any tree in the Activities section.

### *Tree Configuration*

**Expanded Image, Leaf Image Name, End Node Image,** and **Collapsed Image**

Enter the images that appear on the tree. The image appears in the Image Preview half of the group box. Leaf Image is used as a default leaf image of the node.

**Image Height** and **Image Width**

Enter the size of the image that appears on the tree. The default size is 16 by 16.

**Display Levels**

Enter the number of levels up to which the 360-Degree View tree is configurable.

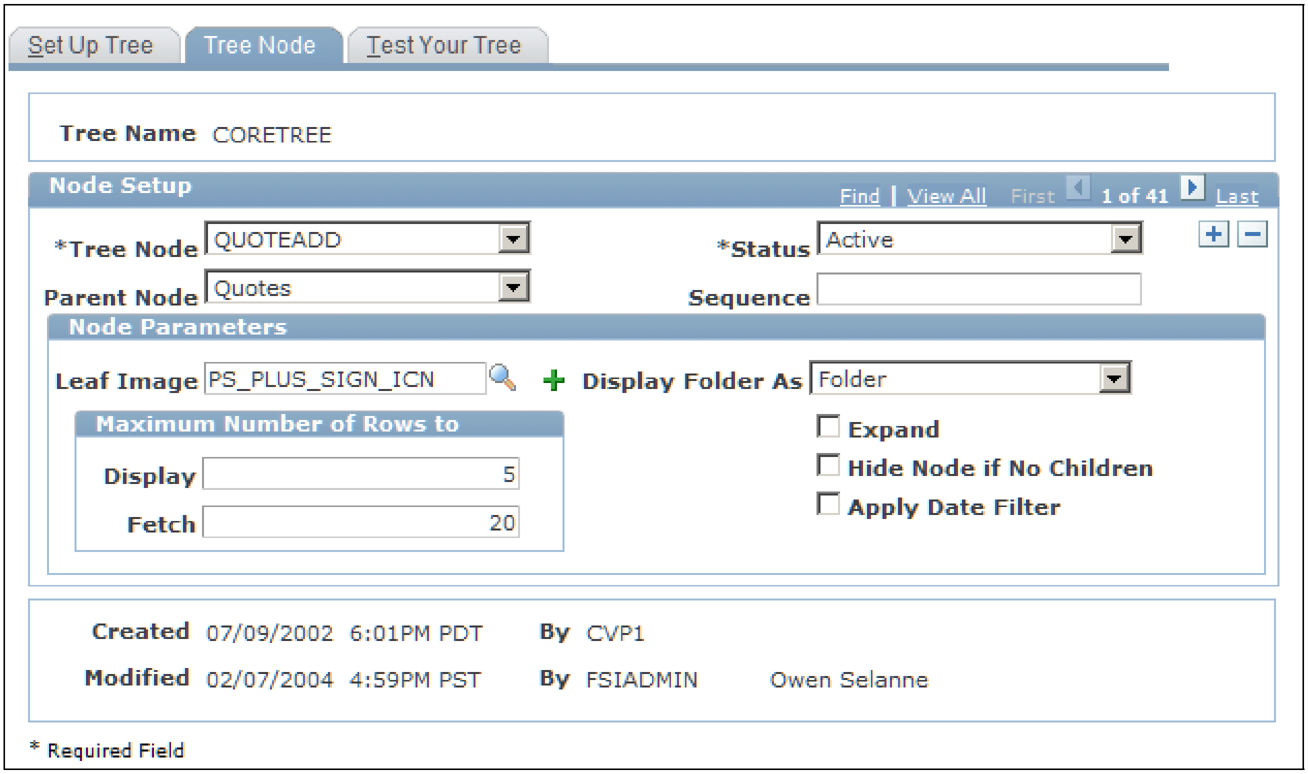
 

| | |
|---|---|
| **Page Size** | Enter the page size for the 360-Degree View tree. This is the size of the HTML area where the 360-Degree View tree appears on the 360-Degree View. |
| **Date Filter** | Select the filter for the tree. Values are:<br>• *1 - Today*<br>• *2 - Yesterday*<br>• *3 - Last Week*<br>• *4 - Last 2 Weeks*<br>• *5 - Last Month*<br>• *6 - Last Year*<br>• *7 - View All*<br>**Note.** All date filters include the values for today. For example, select *2 - Yesterday* to show information that is related to today and yesterday. |
| **Max. Date Filter** (maximum date filter) | Select the maximum date filter, which is used as a restriction against the date field that the user actually enters.<br>The system always looks at this filter when determining the information that appears on the 360-Degree View tree, regardless of what the user specifies in their date personalization settings.<br>If this filter is not set, and if you select View All in the date personalization on the 360-Degree View, and if you select Enable Filtering on Date Range, then the system populates the start date with 01/01/1900 on the 360-Degree View. |
| **Filter Dates By** | Select either *Creation Date* to filter dates by the entity's creation date or *Last Modified Date* to filter dates by the entity's last modification date. |
| **Callback Interaction** | Select how the system should set the status of an interaction when a user clicks the Finish Interaction button. Values are *Set Status to Complete* and *Do not Set Status to Complete* |
| **Footnote Icon** | Select an alternate symbol to indicate a footnote in the 360-Degree View. The system defaults this field to the *dagger* symbol. As an alternative symbol, you can select two asterisks (**). The footnote itself appears next to a node and indicates that the date filter is not applied to the node data. |

## Setting Up Nodes

Access the Tree Node page (Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Tree Node).




Tree Node page

**Tree Node**

Select the child node for the 360-Degree View tree.

**Parent Node**

Select the parent node under which this child node appears in the 360-Degree View tree.

**Status**

Select the tree node's status, either *Active* or *Inactive.* Only active nodes appear on the tree.

**Sequence**

Enter the order in which the child nodes appear on the tree. The sequencing is from low to high.

### *Node Parameters*

**Leaf Image**

Select the image for the leaf. The image appears next to the field. If you leave this field blank, the system uses the default tree leaf image.

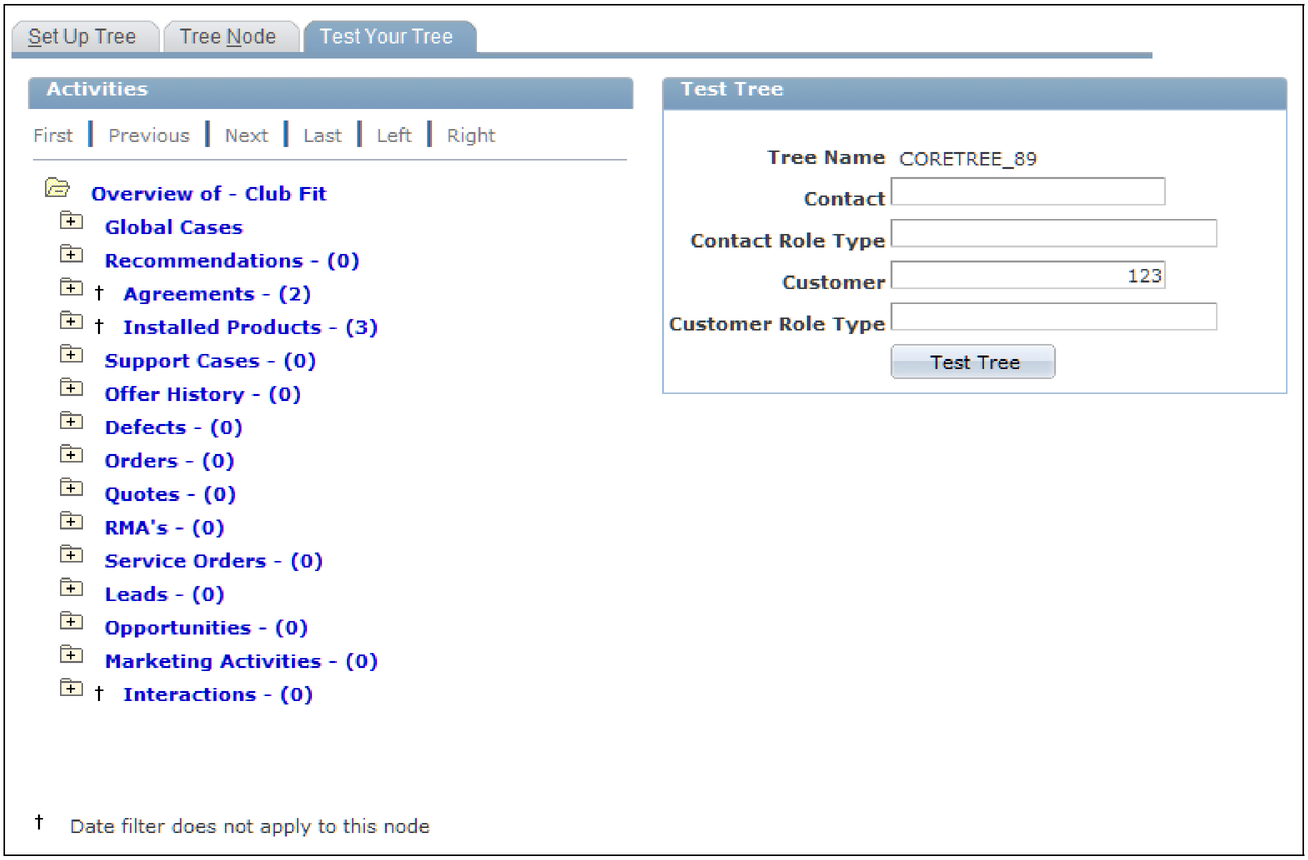
 

| | |
|---|---|
| **Display** and **Fetch** | Enter the maximum number of rows that initially appear under the expanded node in the 360-Degree View Tree located in the Activities section of the page. Then enter the maximum number of rows to fetch, or retrieve, from the database and to display under the node when the user clicks *View All* on that tree node.<br><br>The Display option is only valid for the *View* and *EIP* node types. If the field is blank for either of these node types, the system uses a default value of 5. Values in this field are ignored for other node types.<br><br>The Fetch option is only valid for the *View* and *Peoplecode* node types. If the field is blank for either of these node types, the system uses a default value of 1000. Values in this field are ignored for other node types.<br><br>**Note.** The Display and Fetch options do not apply to the *Dynamic Grid* node action, and they do not influence or control the number of rows generated in the dynamic grid. |
| **Display Folder as** | Select whether you want the node to appear as a folder or a leaf. |
| **Expand** | Select to expand the nodes on the tree when the tree initially appears on the 360-Degree View. |
| **Hide Node if No Children** | Select to hide the node if there are no values. For example, if the customer has no cases, the Case node does not appear on the tree. |
| **Apply Date Filter** | Select to apply a date range to the activities for the given node. This is selected by default. If cleared, the date range criteria does not apply to that node. |

## Testing Trees

Access the Test Your Tree page (Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Test Your Tree).




Test Your Tree page

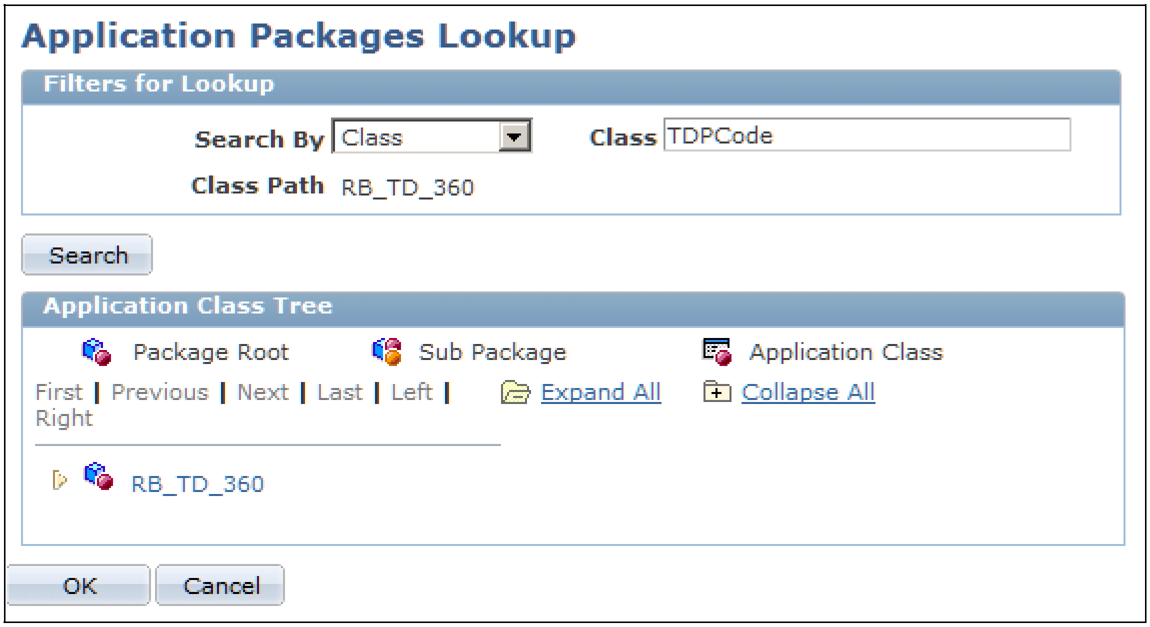
To test a tree:

1. Enter data into one or more of the fields in the Test Tree page region.
2. Click the Test Tree button.

   The system verifies the tree configuration and a preview of the tree appears in the Activities group box.

## Searching for and Viewing Application Packages

Access the Application Packages Lookup page (click the Package Tree Viewer link on the Define Node page).




Application Packages Lookup page

Click any tree node to select the application class, then click OK. The system returns the information to the page from which you transferred.

### Filters For Lookup

Select either Class or Class Path in the Search By field and enter either an application class ID or application class path.

### Application Class Tree

The tree for the application class appears in this portion of the page.

### See Also

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

## Configuring the 360-Degree View

To configure the 360–Degree View, use the Set Up Profile (RB_TD_PROF_SET) and Configure Role (RB_TD_ROLE_TREE) components.

This section discusses how to:

- Set up profiles.
- Configure roles.
- Define transactions with subinteractions.

- Specify nodes to capture subinteractions.
- Define dynamic grids.
- Relate actions to dynamic grids.

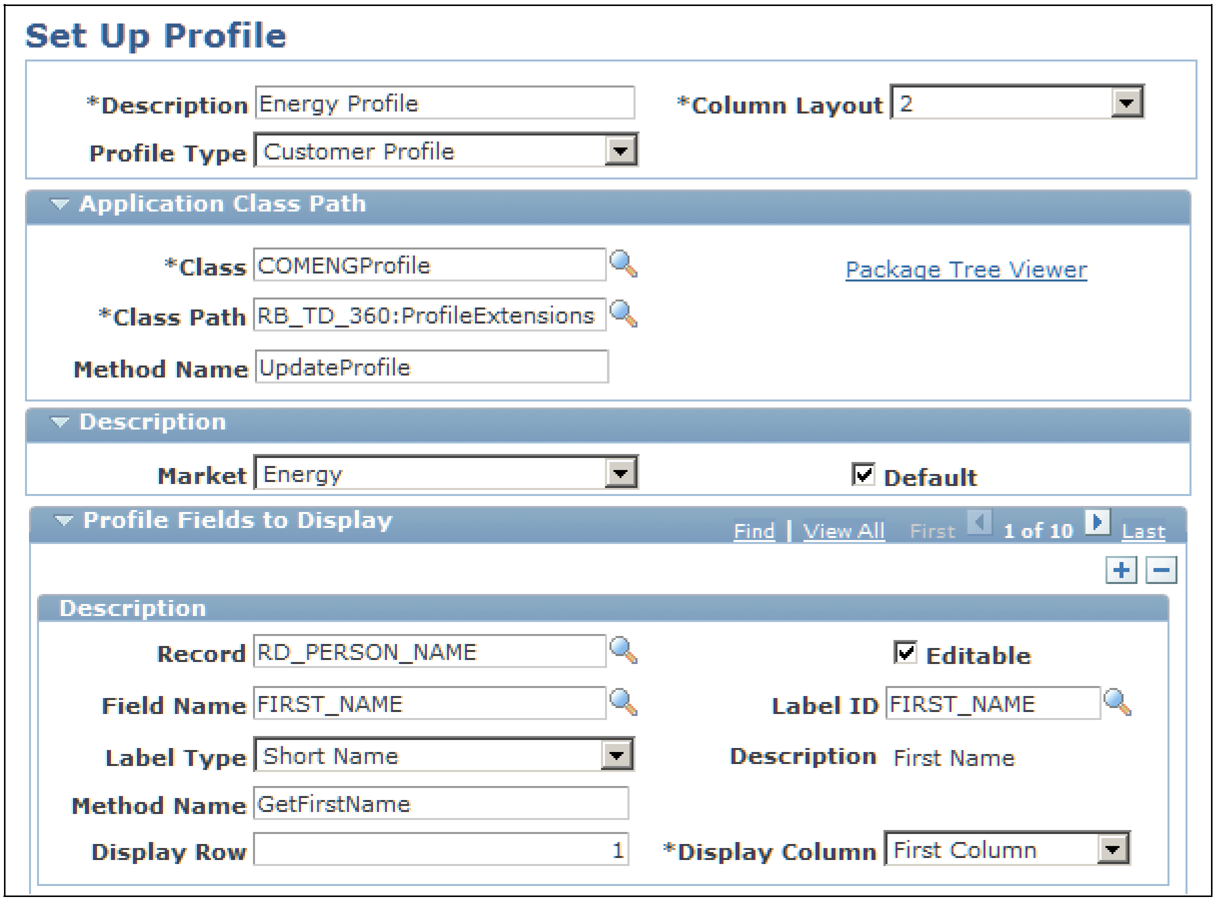
## Pages Used to Configure the 360-Degree View

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Set Up Profile | RB_TD_PROF_SETUP | Set Up CRM, Common Definitions, 360-Degree View, Set Up Profile, Set Up Profile | Define a profile that appears on the 360-Degree View. |
| Configure Role | RB_TD_ROLE_TREE | Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Configure Role | Configure tree information for a role. |
| Transaction Sub-Interactions | RB_TD_SUB_TRANS | Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Transaction Sub-Interactions | Define the transactions for which to capture subinteractions. |
| Node Sub-Interactions | RB_TD_SUB_NODE | Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Node Sub-Interactions | Define the nodes for which to capture subinteractions. |
| Dynamic Grid | RB_TD_DYNGRD_PG | Set Up CRM, Common Definitions, 360-Degree View, Define Dynamic Grid, Dynamic Grid | Define the grid on which transaction information appears. |
| Action Category | RB_TD_ACT_CAT | Set Up CRM, Common Definitions, 360-Degree View, Define Action Category, Action Category | Define categories in which to group actions to display on the Action drop down. |
| Related Actions | RB_TD_DYNGRD_ACT | Set Up CRM, Common Definitions, 360-Degree View, Define Action Category, Related Actions | Relate actions to dynamic grids. |

## Setting Up Profiles

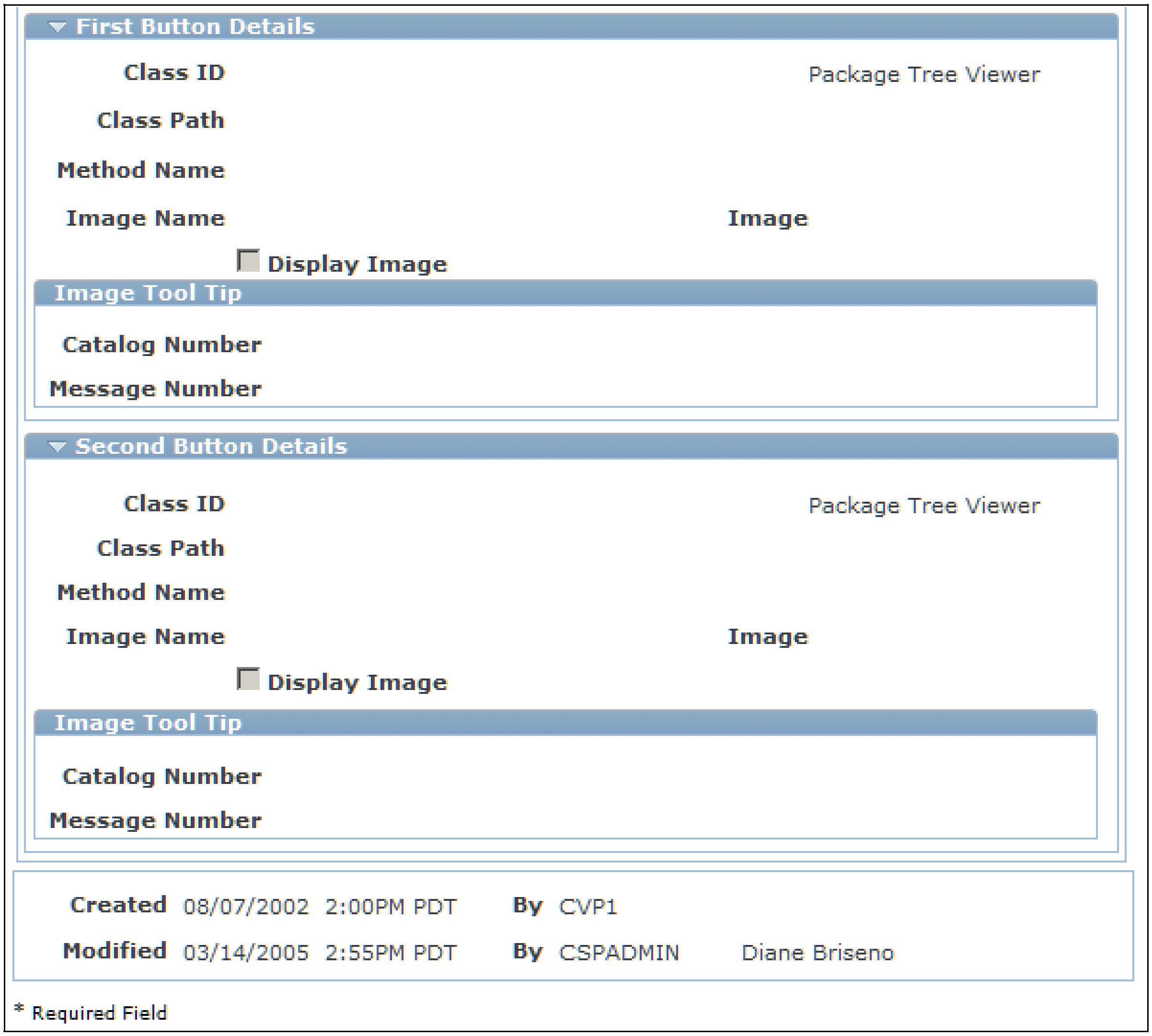
Access the Set Up Profile page (Set Up CRM, Common Definitions, 360-Degree View, Set Up Profile, Set Up Profile).




Set Up Profile page (1 of 2)




Set Up Profile page (2 of 2)

**Column Layout** Select the column layout for profile display.

**Profile Type** Select *Customer Profile, Financial Profile,* or *Other.* This field controls the information that is available for inclusion in profile data.

### *Application Class Path*

**Package Tree Viewer** Click to search for and view all of the application packages that PeopleSoft CRM provides.

See and Chapter 18, "Setting Up the 360-Degree View," Searching for and Viewing Application Packages, page 319.

### *Description*

**Market** — Specify the market with which to associate this profile. A component is uniquely identified by its name and its market association.

**Default** — Select to set this profile as the default profile for this market.

### *Profile Fields to Display*

Use the Add icon (+) to define multiple fields for the profile section.

**Record** and **Field Name** — Enter the record and field name that you want to appear in the 360-Degree View Profile group box.

**Editable** — Select the Editable check box to allow an agent to update the field's value.

**Note.** In this release, you can apply the Editable feature only to these fields: FIRST_NAME, LAST_NAME, EMAIL_ADDR, ADDRESS_PHONE, and EXTENSION. Also, profile fields for PeopleSoft HelpDesk for Human Resources are not editable because the profile information resides in the HR database.

**Label ID** — Enter the label ID for this field in the Profile group box.

**Label Type** — Select whether you want the *Long Name* or *Short Name*to appear for this field in the Profile group box.

**Method Name** — Enter the name of the method that fetches the data from the record that you have specified. This method comes from the application class defined Application class path section.

**Display Row** — Enter a number to indicate the fields horizontal placement in the Profile group box relative to the other fields. Be sure that you take into account the number of Display columns when you plan the layout of the fields in the Profile group box.

**Display Column** — Select *First Column* (left side) or *Second Column* (right side) to indicate the field's vertical placement.

**Note.** If you want to move the Address field from the default first column to the second column, additional code change is required.

### *First Button Details and Second Button Details*

Use the fields in these sections to define the buttons in the 360-Degree View Profile group box. You can use these two to add any drill down actions like transferring to a transaction or opening a 360-Degree View page for the parent business object.

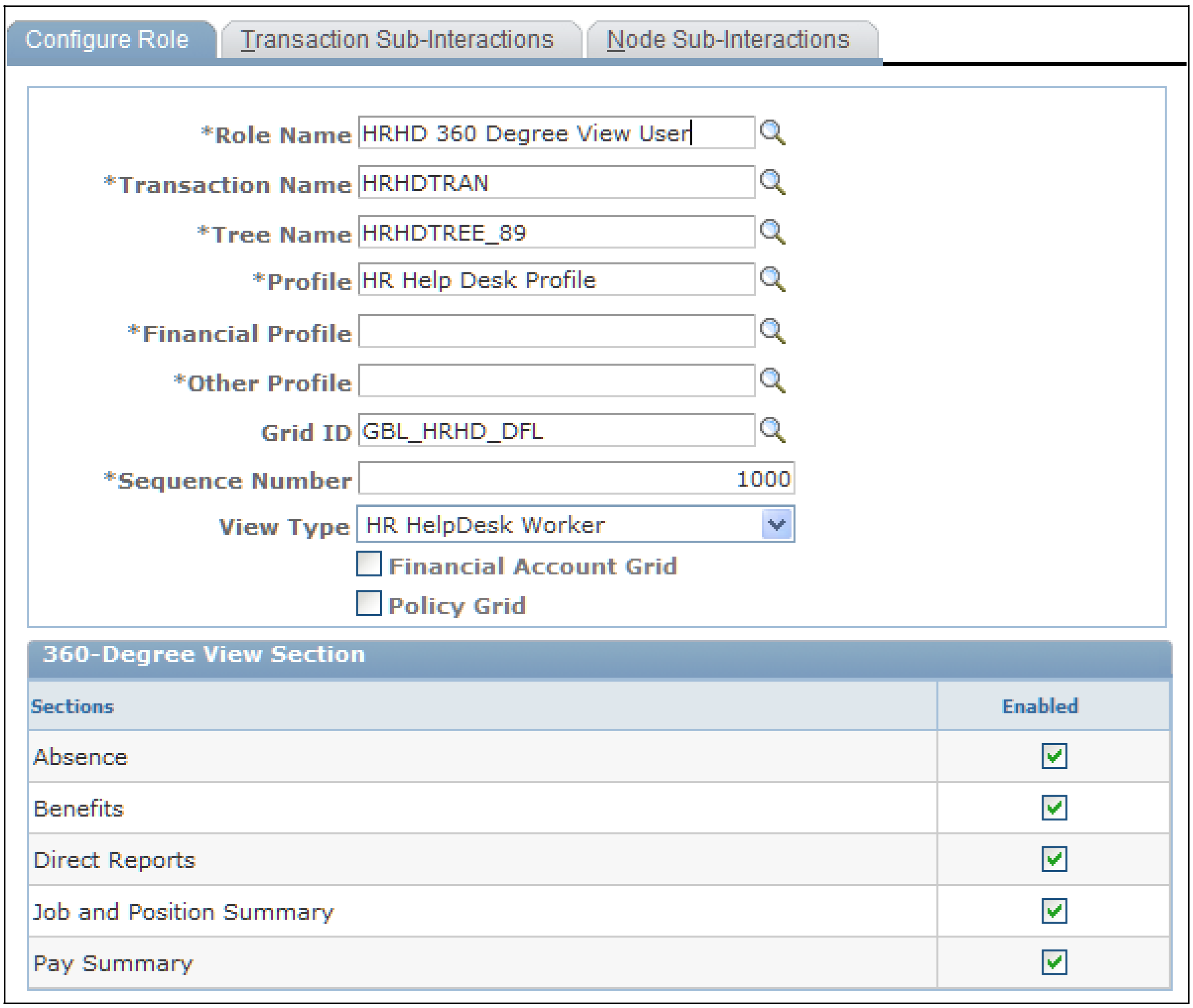
 

You can specify one, two, or no buttons. If there are any editable fields in the profile, the system automatically displays the Apply Changes button.

| | |
|---|---|
| **Class ID, Class Path,** and **Method Name** | Enter information to locate and identify the method that is executed when a user clicks the first or second button in the 360-Degree View row. |
| **Image Name** | Select a button image from the lookup list. |
| **Display Image** | Select to enable the button's display. |
| **Image Tool Tip** | Select an appropriate label for the popup tool tip. |

## Configuring Roles

Access the Configure Role page (Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Configure Role).




Configure Role page

**Role Name**

Select a PeopleTools role.

**Transaction Name**

Select the transaction group that you want to associate with this PeopleTools role.

See  and Chapter 18, "Setting Up the 360-Degree View," Defining Transaction Groups, page 305.

**Tree Name**

Enter the tree that you want to associate with this PeopleTools role.

See  and Chapter 18, "Setting Up the 360-Degree View," Setting Up Trees, page 314.

**Profile**

Enter the profile that you want to associate with this PeopleTools role.

These profiles are available as system data:

- COMPR (Communications Profile).
- CORE (Core Profile).
- EBSHR (HR Help Desk Profile for E-Business HCM).
- ENGPR (Energy Profile).
- FSIPR (FSI Profile).
- INSPR (Insurance Profile).
- HE (Higher Education Profile).
- HRHD (HR Help Desk Profile).
- WRKER (Worker profile).

See  and Chapter 18, "Setting Up the 360-Degree View," Setting Up Profiles, page 321.

**Sequence Number**

Enter a number that the system uses to determine which role information appears by default on the 360-Degree View when the user has more than one role in the system.

For example, if a user has the PeopleSoft User role with sequence number 20 and the Support Manager role with sequence number 10, then the information that is related to the Support Manager role is used to initially populate the 360-Degree View because it has the lowest sequence number.

The user can change the role that appears.

See  and Chapter 18, "Setting Up the 360-Degree View," Configuring Roles, page 325.

**View Type**

Select the type of view for this role. Values are:

- *Constituent*
- *Customer*
- *Partner*
- *HR HelpDesk Worker*
- *Worker*

If the View Type is *Constituent* or *HR HelpDesk Worker,* the 360-Degree View Section grid is displayed listing all the possible extra sections that can appear on the 360-Degree View page: select the corresponding Enabled check box for each section that should be displayed for that role.

The system uses the view type to determine the role and related information that appears in the 360-Degree View. If the view type has any of the above values, the system selects only the role with the specified view type having the lowest sequence number.

For example, a user has the PeopleSoft User (sequence number 10, view type of Customer), HR HelpDesk Agent (sequence number 20, view type of HR HelpDesk Worker), Support Admin (support administration; sequence number 25, view type of Customer), and IT HelpDesk Agent (sequence number 30, view type of Worker) roles. When launching the 360-Degree View from Case, if the view type is *Worker,* then the system selects the IT HelpDesk Agent role and shows the HelpDesk tree with HelpDesk Profile information. If the view type is *Customer,* the system selects the PeopleSoft User role because it has a sequence number less than that of the Support Admin role.

**Financial Account Grid**

Check this option to display a customer's accounts

**Policy Grid**

Check this option to display a customer's policies.

---

**Note.** When integrating with PeopleSoft or E-Business HCM, the information on the Configure Role page determines in part the data that needs to be brought over from the corresponding Human Resource system. Unlike the integration to PeopleSoft HCM, no entity level security is imposed by Oracle E-Business. In E-Business, security is imposed by the virtue of the functions to which the user has access.

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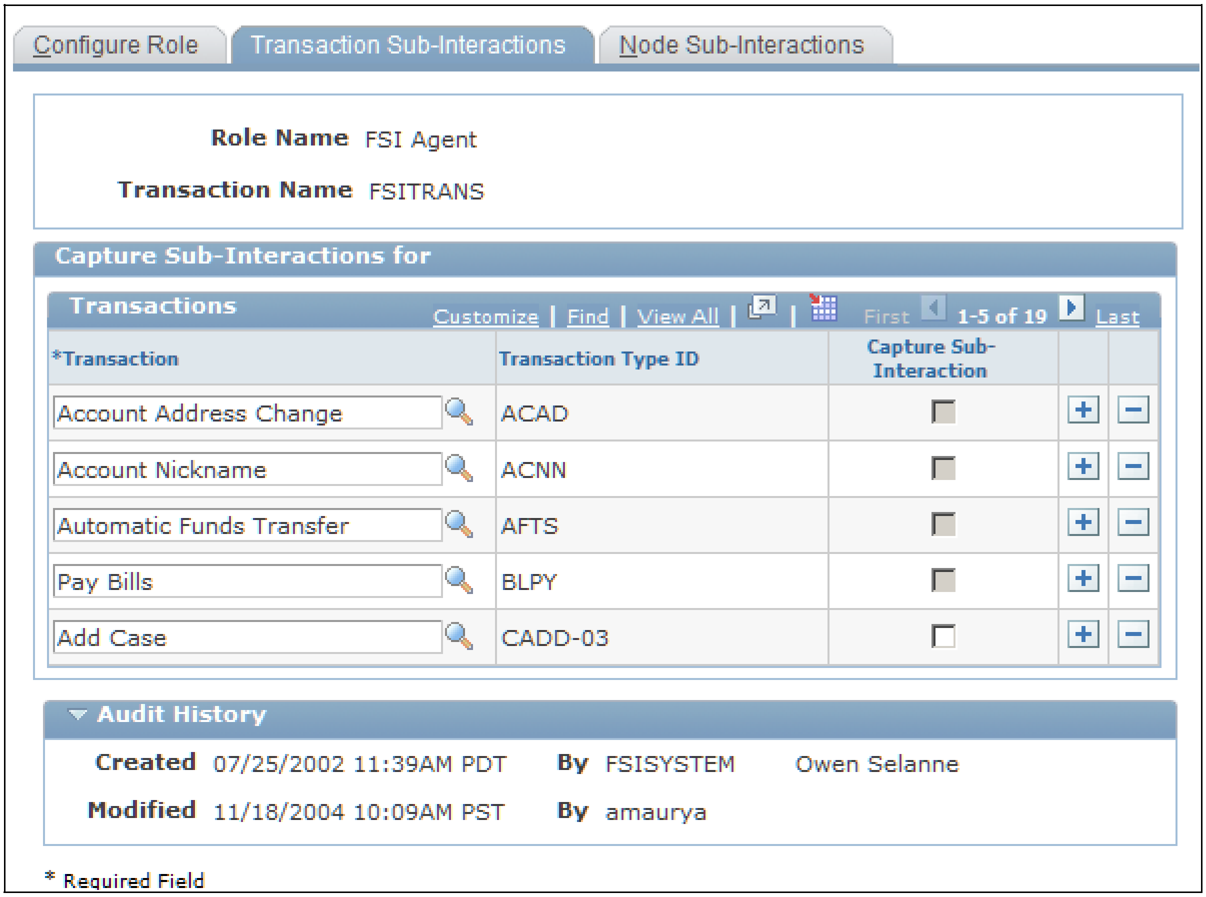
## Defining Transactions with Subinteractions

Access the Transaction Sub-Interactions page (Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Transaction Sub-Interactions).




Transaction Sub-Interactions page

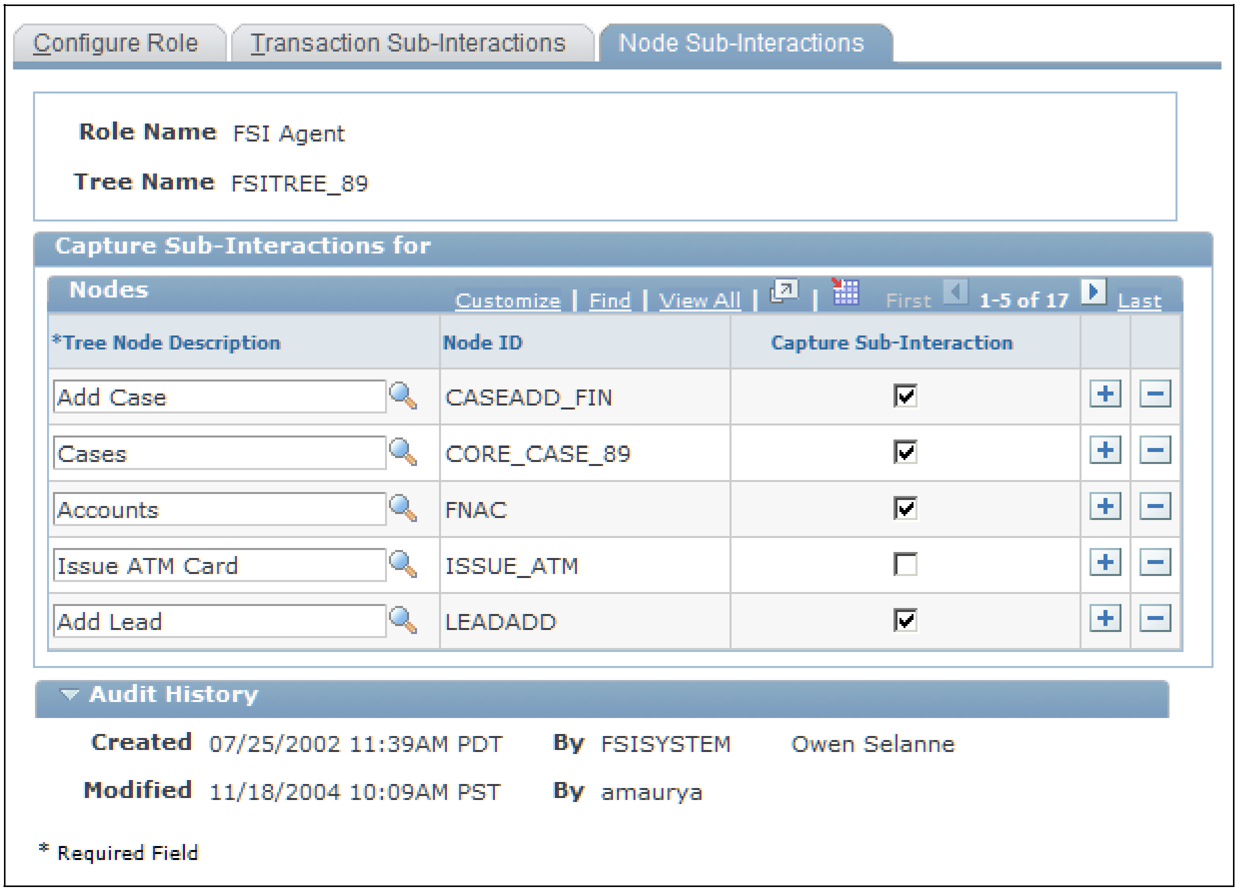
When you access this page, all transactions that are associated with the transaction group appear.

| | |
|---|---|
| **Capture Sub-Interaction** | Select to enable the corresponding transaction to capture subinteractions for this role. |

**Note.** Not all transactions were designed to be able to capture sub-interactions. The Capture Sub-Interaction check box is disabled for any transaction for which it does not apply.

## Specifying Nodes to Capture Subinteractions

Access the Node Sub-Interactions page (Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Node Sub-Interactions).




Node Sub-Interactions page

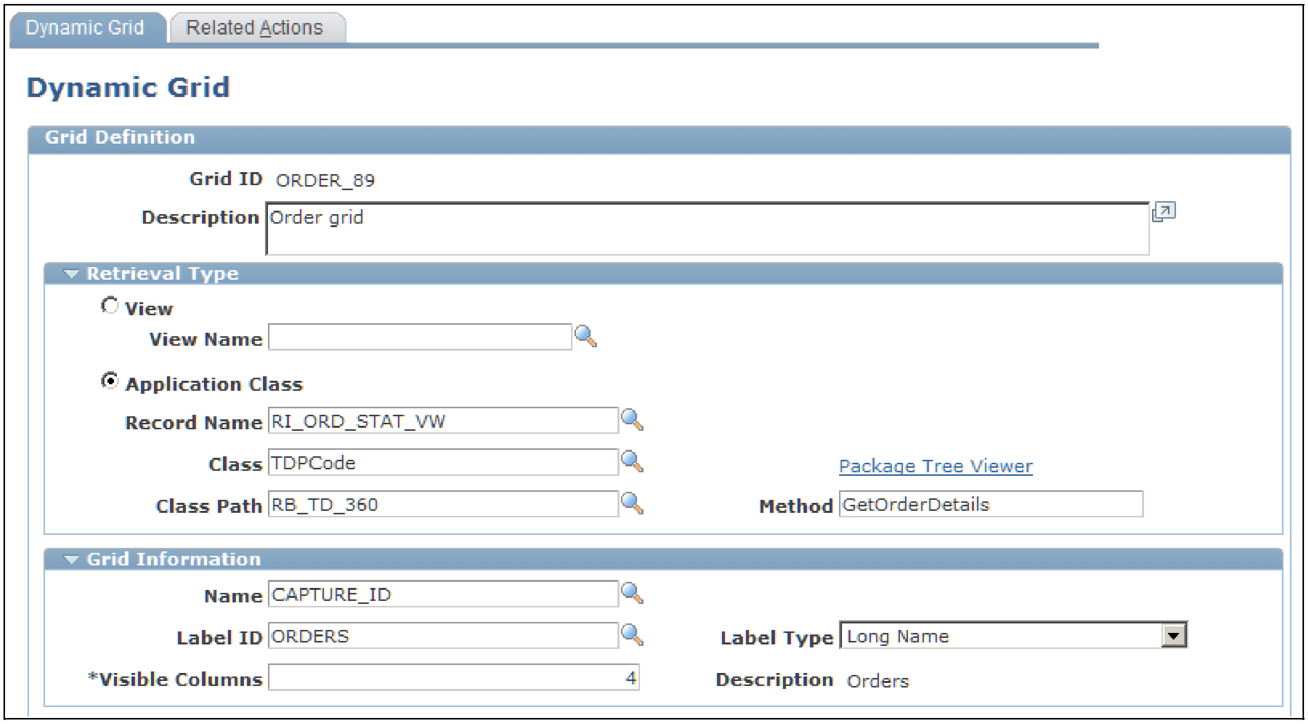
When you access this page, all tree node descriptions that are associated with the tree appear.

| | |
|---|---|
| **Capture Sub-Interaction** | Select to enable the corresponding tree node to capture subinteractions.<br>**Note.** Not all nodes were designed to be able to capture sub-interactions. The Capture Sub-Interaction check box is disabled for any transaction for which it does not apply. |

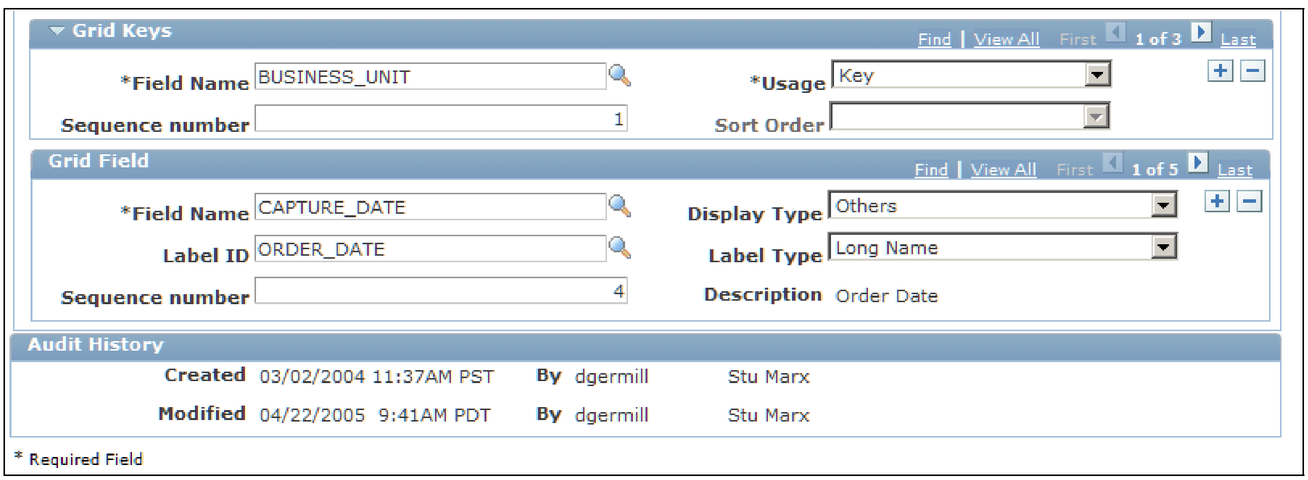
## Defining Dynamic Grids

Access the Dynamic Grid page (Set Up CRM, Common Definitions, 360-Degree View, Define Dynamic Grid, Dynamic Grid).




Dynamic Grid page (1 of 2)




Dynamic Grid page (2 of 2)

### *Retrieval Type*

Specify either the database view or the application class that is the source of the data that populates the dynamic grid.

**View** and **View Name** — Select to indicate that the data source is a database view. Enter the name of the database view that holds data that is returned by the database view.

**Application Class** — Select to indicate that an application class runs to provide the data that appears on the dynamic grid.

**Record Name** Enter the name of the record that holds data that is returned by the application class method.

**Class, Class Path,** and **Method Name** Enter the application class information for this application class. The method that your assign here is used to create the request message and populate the node with the requested information.

**Package Tree Viewer** Click to locate an application class.

### Grid Information

Enter data that names the grid and describes its appearance.

**Visible Columns** Enter a number to specify how many of the fields defined in the Grid Field section will initially display in the dynamic grid. The first *n* fields (in order based on Sequence Number) from the Grid Field definitions will be displayed based on the number that is provided in the Visible Columns field.

360-Degree View users will be able to view the entire set of fields for the dynamic grid, if desired, by clicking the Show All Columns link.

### Grid Keys

**Field Name** Enter the name of the field that the system uses as a key when transferring to another component.

**Sequence number** Enter the sequence of the key.

### Grid Field

Enter information that describes each field that appears in the grid. Add fields using the Add a new row (+) button.

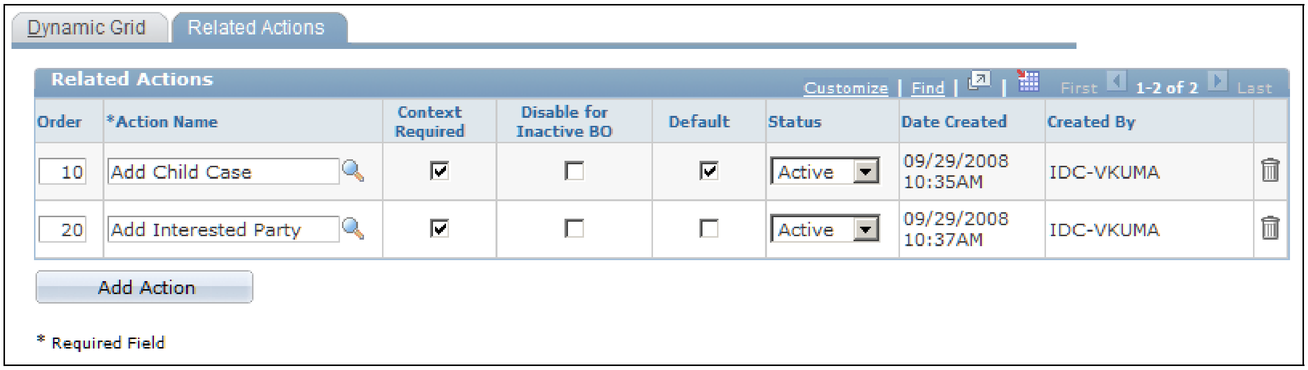
**Field Name** Select the name of the field whose values you want to appear in the grid. Available fields are based on the view name or the record name selected in retrieval type section.

| | |
|---|---|
| **Display Type** | Select one of the following to indicate how the Field Name value will be displayed on the grid:<br>• *Hyperlink*<br>Select to enable the user to initiate the transfer by clicking on the field value text.<br>• *Long Translate*<br>This option is for the display of a string that contains the Long translate (XLAT) value of the field, provided the field is based on a translate table.<br>• *Others*<br>Select this option to display the value as read-only.<br>• *PushButton*<br>Select to make the field appear as a button that initiates the transfer.<br>• *Related Display*<br>This option is for the display of a custom element.<br>• *Short Translate*<br>This option is for the display of a string that contains the Short translate (XLAT) value of the field, provided the field is based on a translate table. |
| **Label ID** | If you want the field to be displayed by its label, select *Field Label ID.* |
| **Label Type** | If you selected Field Label ID, indicate if you want to display the *Long Name* or *Short Name* for the field label. |
| **Sequence number** | Enter the a number *1* or greater number to indicate the position of the text field in relation to the other text fields you define. |
| **Description** | The system displays the text description specified for the Label ID field. It is not editable here. |

## Relating Actions to Dynamic Grids

Access the Related Actions page (Set Up CRM, Common Definitions, 360-Degree View, Define Action Category, Related Actions).




Related Actions page

**Order**

Enter the number *1* or a greater number to indicate the order in which you want the action to appear in the Actions drop-down list at the top right corner of the dynamic grid page.

**Context Required**

Select if you want the system to require the user to select a row from the grid when selecting this action. The context itself is specified in the action category to which the action belongs.

When the user clicks the Go button for the Action drop-down list box, the default values defined in the actions are made available in a global record along with the selected rows in the grid. The system then triggers the method associated with the action category.

See  and Chapter 18, "Setting Up the 360-Degree View," Defining Action Categories, page 298.

**Disable for Inactive BO**

Select to prevent the action from being performed on business objects that are inactive.

**Default**

Select to display the action in the drop-down list.

**Status**

Select *Active* or *Inactive.* The default is *Active.* Only *Active* actions appear in the Action drop-down list box.

# Configuring the 360-Degree View Search Page

To configure the 360-degree view search page, use the User Links (RB_TD_ANON_LINKS) and 360-Degree Search Preferences (RB_TD_USRSRCHPREF) components.

This section provides an overview and discusses how to:

- Define user links that appear on the search page.
- Select the search page that is used to access the 360-Degree View.

## Understanding 360-Degree View Search Pages

360-Degree View search pages use the customer identification framework to identify the customer or worker whose information appears on the 360-Degree View. Different 360-Degree View search pages are defined for each of the PeopleSoft CRM industry solutions or markets. You can control which search page a user accesses by setting the user's market preferences.

Additionally, you can create user links (which you click to access a component) that appear on these search pages.

### See Also

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Using Business Object Search and Quick Create Functionality," Customer Identification

Chapter 19, "Using the 360-Degree View," Accessing the 360-Degree View, page 343

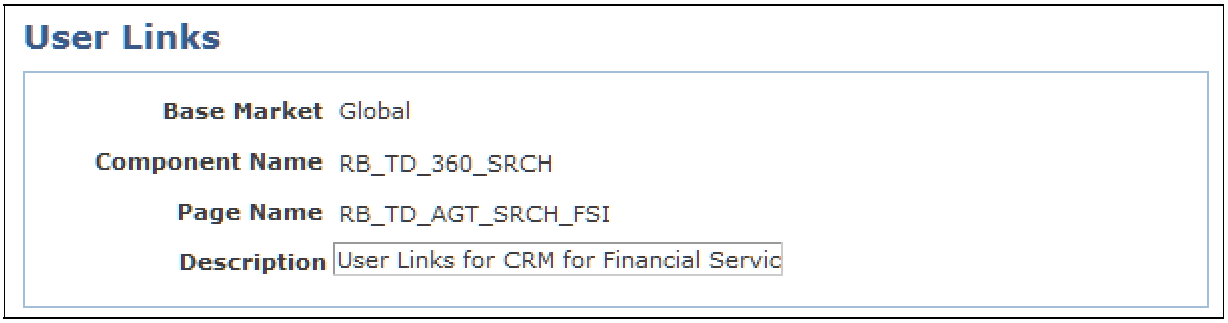
## Pages Used to Configure the 360-Degree Search Page

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| User Links | RB_TD_ANON_LINK_PG | Set Up CRM, Common Definitions, 360-Degree View, User Links, User Links | Define user links that appear on the 360-Degree Search page. |
| Application Packages Lookup | RB_APPLPKG_PG1 | Click the Package Tree Viewer link on the User Links page. | Search for and view the available application packages or classes that PeopleSoft CRM provides. |
| Search Preferences | RB_TD_USRSRCHPREF | Set Up CRM, Common Definitions, 360-Degree View, Search Preferences, Search Preferences | Select the search page that you use to access the 360-Degree View. |

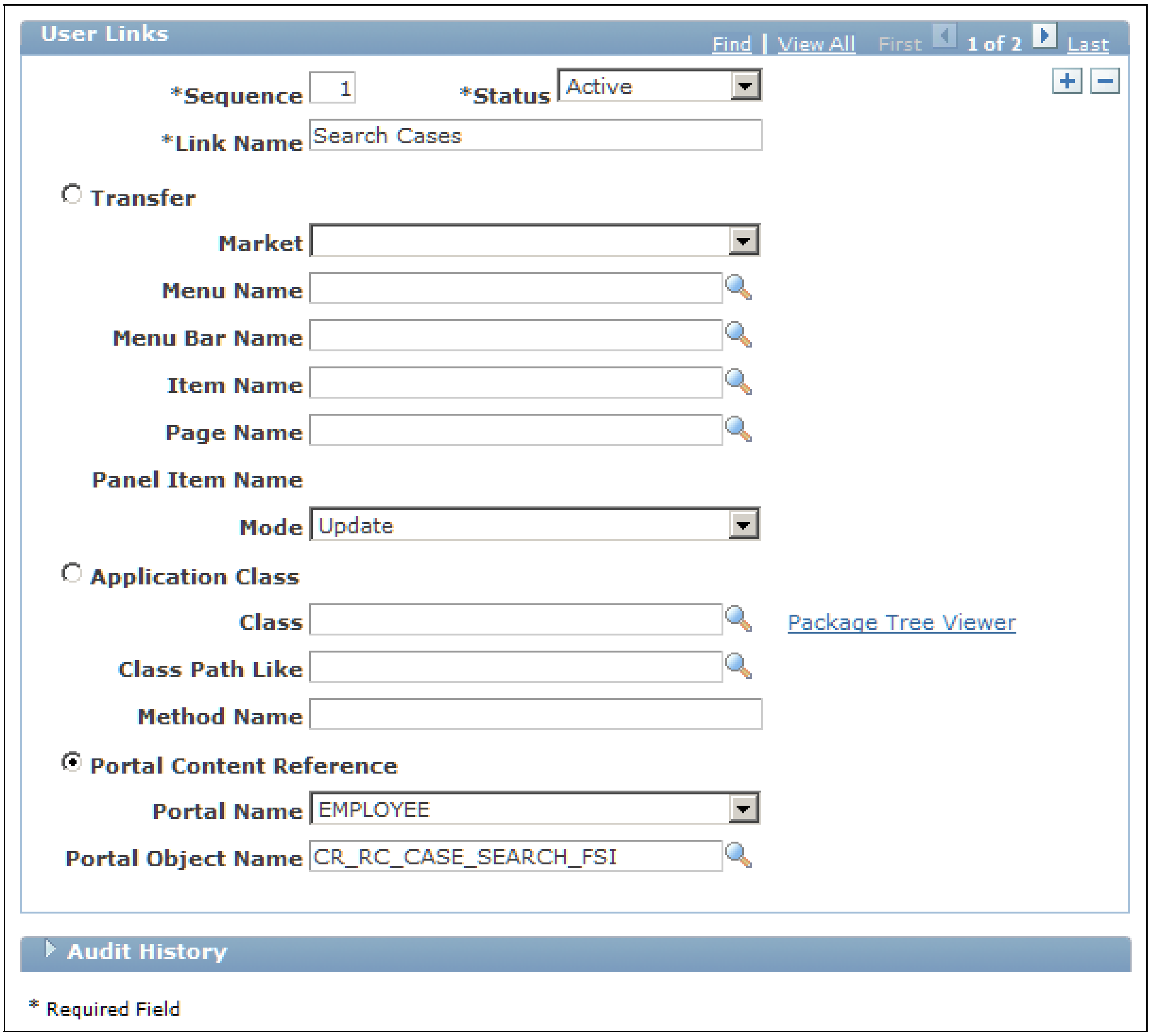
## Defining User Links That Appear On the Search Page

Access the User Links page (Set Up CRM, Common Definitions, 360-Degree View, User Links, User Links).




User Links page (1 of 2)




User Links page (2 of 2)

---

**Note.** Currently, PeopleSoft CRM provides predefined user links for the search pages in the financial industries.

---

**Base Market** The base market where this user link applies.

**Component Name** and **Page Name** The component and page where this set of user links appears.

**Description** The description for this set of user links.

### *User Links*

Define each user link that appears on the search page.

**Sequence** Enter a number that the system can use to determine the order in which the user links appear on the page.

**Active** Select the status of the user link, either *Active* or *Inactive.* Only active user links appear on the page.

**Link Name** Enter the link name. This appears on the page as the user link.

For each user link that you define, select the option that defines the action taken when the user clicks the link. Actions are:

**Transfer** Select to have the user link transfer to a PeopleSoft CRM component and page that you define.

If you select Transfer, use the Market, Menu Name, Menu Bar Name, Item Name (component name), Page Name, and Mode fields to select where you want the user link to take you.

**Application Class** Select to have the user link calls a PeopleSoft CRM application class.

If you select Application Class, enter the Class, Class Path Like, and Method Name fields to define the application class that the system to call.

**Package Tree Viewer** Click to access the Application Packages Lookup page to search for and view the available application packages that PeopleSoft CRM provides. The information that you select on this page appears on the User Links page after you click OK.

See and Chapter 18, "Setting Up the 360-Degree View," Searching for and Viewing Application Packages, page 319.

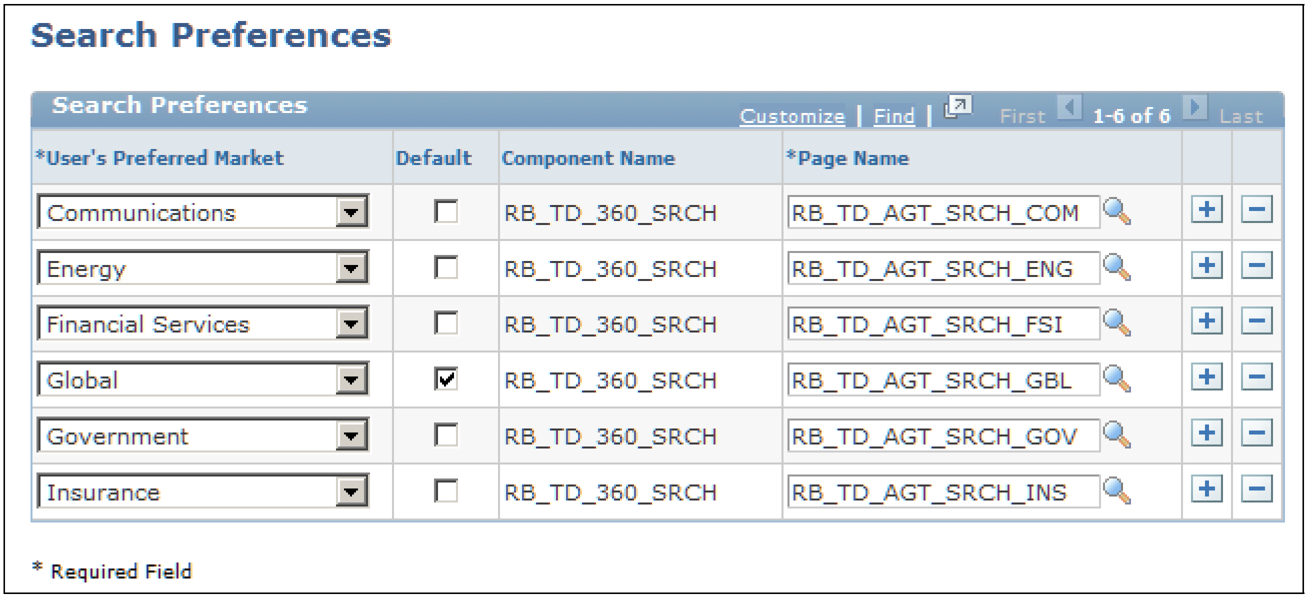
**Portal Content Reference** Select to have the user link transfer to a PeopleSoft CRM portal page that you define.

If you select Portal Content Reference, use the Portal Name and Portal Object Name fields to select the portal page to which you want to transfer.

## Selecting the Search Page That Is Used to Access the 360-Degree View

Access the Search Preferences page (Set Up CRM, Product Related, 360-Degree View, Search Preferences, Search Preferences).




Search Preferences page

Select the default search page that you want to use to access the 360-Degree View for the different markets. You can define a different search page to access the 360-Degree View for each market.

The system checks the user's preferences to determine the market that is associated with that user and then uses the search preferences that you define on this page to determine the search page that appears when users access the 360-Degree View. If you do not define a market value for the user on the user preferences page, the system uses the search page that is associated with the Global market from this page.

---

**Note.** The search preference defaults to the search page that is associated with the Global market.

---

| | |
|---|---|
| **User's Preferred Market** | Select a preferred market if it is not already shown on the page. |
| **Default** | Select to indicate the page that you want the system to display in the selected row when no market preference exists for the user. |

## Chapter 19

# Using the 360-Degree View

This chapter provides an overview of 360-degree views and discusses how to:

- Access the 360-Degree View pages.
- Manage overall activity for a business object.

## Understanding the 360-Degree View

This section discusses:

- 360-degree views.
- 360-degree view toolbar.

### 360-Degree Views

360-degree views provide a summary view of overall activity for a business object—a customer, contact, partner, or worker. From a 360-degree view, you can review or initiate transactions, record interactions and subinteractions, view relationships, and view tasks for the business object.

A 360-degree view page includes these page regions:

| ***Region*** | ***Details*** |
| --- | --- |
| Role | This drop-down field lists the roles that are associated with the business object whose information appears on the page. You can select a role to filter data and transactions so that only those that pertain to that role appear in the view.<br><br>See  and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Understanding Business Object Relationship Model Components." |

| ***Region*** | ***Details*** |
|---|---|
| Actions | This field lists the transactions that are defined for the 360-Degree view page. Select the transaction to perform the associated actions or to transfer to the page that performs the desired actions. Transactions populate relevant fields on the transaction page from the data that is identified on the 360–Degree View page.<br><br>See  and Chapter 18, "Setting Up the 360-Degree View," Configuring Actions and Transactions for the 360-Degree View, page 297. |
| Summary | Information such as name, contact information, and customer value appears here. The Summary page region can include up to two buttons that transfer to components that contain more information about the business object. Depending on the 360-Degree View profile configuration, users may be able to modify the person's or company's phone and email data in the CRM database from this section (note that this is not available for all 360-Degree Views, such as those for HR HelpDesk). |
| Activities | Activities appear in a tree format that contains a record of all transactions, interactions, and subinteractions that involve the business object. Transactions are grouped under nodes. Select a node to view, add, modify, or search for a transaction.<br><br>The specific nodes that appear on the Activities tree vary depending on the business object and role that you select.<br><br>Interactions are grouped by date.<br><br>See  and Chapter 18, "Setting Up the 360-Degree View," Setting Up the 360-Degree View Tree, page 306. |
| Date Filter | This field enables you to select a date range that controls which transactions appear in the tree. |
| <activity> Detail | The information that appears in this area changes depending on which node you select in the activities tree. Summary information about the transactions that are under the node that you select in the 360-Degree view tree appears in this grid.<br><br>When you first access the 360-Degree View page, the system displays information that is controlled by the default setting that is specified for the page.<br><br>See  and Chapter 18, "Setting Up the 360-Degree View," Setting Up the 360-Degree View Tree, page 306. |
| Log Interaction | Using this group box, you can capture interaction details, record the callback date and time, attach notes to the interaction, and send an email to the customer or internal personnel (if the email address is set up).<br><br>See  and Chapter 17, "Working with Interactions," page 273. |

| Region | Details |
|---|---|
| Current Actions | This area lists all the transactions that occur during the current interaction or current 360–degree view session. |
| Relationship Viewer | All of the business object relationships for the customer are accessible from this page.<br>See and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Working with the Relationship Viewer." |
| Tasks | This page lists all the tasks that pertain to the business object. You can drill down to view the task detail.<br>See and Chapter 23, "Working with Tasks," page 423. |
| Call Reports | This page lists all the call reports that pertain to the business object. You can drill down to view the call report detail.<br>See and Chapter 24, "Working with Call Reports," page 453. |

The specific information that you see on a 360-Degree View page varies depending on whether you are viewing a customer, contact, site, partner, worker, or human resources help desk (HRHD) worker.

The system records all interactions with the business object and displays them in the Activities section of the 360-Degree View page. An interaction can contain multiple subinteractions. For example, a call with a customer might involve a case being updated, a service order being added, and a note about the customer. All of these subinteractions are logged under the same interaction.

The specific activities and transactions that appear in the Activity Tree page region and Actions drop down box differ depending upon which 360-degree view you access.

You can utilize these types of 360-degree views:

- Customer

  The customer 360-degree view is used to manage transactions and activities that relate to customers, sites, and contacts of customers.

- Partner

  The partner 360-degree view is used to manage transactions and activities that relate to partners and contacts of partners.

  See and *PeopleSoft Partner Relationship Management 9.1 PeopleBook.*

- Worker

  The worker 360-degree view is used to manage cases and interactions for workers who call the help desk for support.

  See and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook.*

- Constituent

  The constituent 360-degree view is used when integrating with PeopleSoft Campus Solutions to manage cases and activities for individuals who call the service center. In addition to the sections that appear on all 360-degree views, the Constituent 360-degree view includes display-only information about the individual's academic information, if applicable, including checklists, communication, and comments; recruiting; admissions; transfer credits; academics; finances; financial aid; transcript requests; contributor relations; and affiliations.

  See  and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Setup Data."

  Three trees are delivered for higher education. Information Technology (IT) related issues are shown in the Higher Education IT Tree while the Higher Education Support Tree is designed to show non-IT related issues. The Higher Education Blended Tree shows both IT and non-IT related issues. The Configure Role page is used to associate a tree with a particular role

- HRHD Worker (human resources help desk worker)

  The HRHD Worker 360-degree view is used to initiate transactions and manage activities that relate to the worker's HR data. In addition to the sections that appear on all 360-degree views, the HRHD worker 360-degree view includes information about the worker's job and position, payroll information, and benefits.

  The HRHD 360-degree View page provides security that is based on section-level information only. There is no field-level security. For example, if an agent has access to information for one job and not the other, or the agent only has access to part of the information, the system still retrieves all job information. This enables a true 360-degree view of an employee.

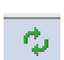
  See  and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook.* and Chapter 4, "Setting Up Security and User Preferences," page 49.

## Using the 360-Degree View Toolbar

Toolbars are configurable and customizable. In addition, you can give end-users the ability to personalize their own toolbar.

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

PeopleSoft CRM delivers these buttons for the 360-Degree View toolbar:

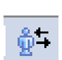


Click the Reload button to refresh the information that appears on the 360-Degree View tree.

---

**Note.** Clicking this button will not refresh other sections of the page: only the data in the 360-Degree tree itself is reloaded.

---



Click the New Search button to finish the interaction with the current customer and return to the Search page. Depending on the option that was selected for Callback Interaction when the tree was originally set up, the interaction status is either identified as *Completed* or left open for further activity with the customer.

Click the Notification button to send a notification.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Sending Manual Notifications."

Click the Correspond button to send ad hoc email correspondence.

See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Sending Correspondence."

---

**Note.** This button does not appear for the Company role.

---

Click the Add to My Contacts button to add the selected contacts to the My Contacts list.

This icon is intended for use only when integrating with PeopleSoft Campus Solutions.

Click the Academics button to transfer to the Career page of the Academics component. This page will be displayed directly if there is only one combination of Institution and Career for the individual on the 360-Degree View page. If there is more than one such combination, the search page for the Academics component will be displayed.

This icon is intended for use only when integrating with PeopleSoft Campus Solutions.

Click the Test Scores button to transfer to the Test Scores page for the constituent.

**Return**

Click to transfer back to the Contact 360–Degree View page from which you accessed the Company 360-Degree View. This button appears only if you transfer to the Company 360-Degree view by clicking 360–Degree view icon in the summary section of Contact 360–Degree View.

**Personalize**

Click the Personalize link to personalize the toolbar buttons.

### *See Also*

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Toolbars"

## Accessing the 360-Degree View

This section discusses how to search for customers in the 360-Degree View.

---

**Note.** Only the Customer 360-Degree View search page is discussed in detail. The search pages that are used to access other 360-Degree Views are similar in usage.

---

## Pages Used to Access the 360-Degree View

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Search for Customer | RB_TD_AGT_SRCH_GBL | Customer 360-Degree View, Search for Customer | Search for a customer whose information you want to view. |
| Search for Customer | RC_HE360_SRH | Constituent 360-Degree View, Search for Customer | Search for a company, contact, worker, or individual consumer (including academic constituent) whose information you want to view. |
| Search for Partner | RB_TD_AGT_SRCH_PRT | Partner 360-Degree View, Search for Partner | Search for a partner whose information you want to view. |
| Search for Worker | RC_HD360_SRH | Worker 360-Degree View, Search for Worker | Search for a worker whose information you want to view. |
| Search for Worker | RC_HRHD360_SRH | HRHD Worker 360-Degree View, Search for Worker | Search for a worker whose HR information you want to view. |

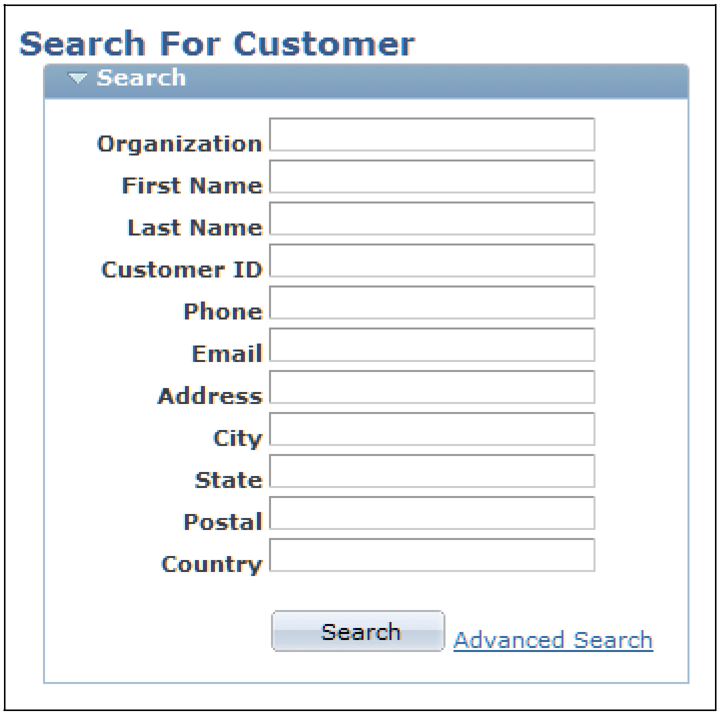
## Searching for Business Objects in the 360-Degree View

Access the Search for Customer page (Customer 360-Degree View, Search for Customer), the higher education Search for Customer page (Constituent 360-Degree View, Search for Customer), the Search for Partner page (Partner 360-Degree View, Search for Partner), the Search for Worker page (Worker 360-Degree View, Search for Worker), or the Search for Worker page (HRHD Worker 360-Degree View, Search for Worker).

---

**Note.** The Search for Customer page of the Customer 360-Degree View is shown for illustration purposes. The other search pages are similar in usage.

---




Search for Customer page

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**Note.** When you sign into the CRM system and access a 360-Degree View for the first time, the search page appears, which lets you select a customer to view on the 360-Degree View. Next time you access the 360-Degree View again in the same login session, the system skips the search page and displays the information of the previously selected customer automatically.

---

### *Search*

You can enter search criteria in any or all of the search fields. The system searches for business objects that match the criteria you enter.

---

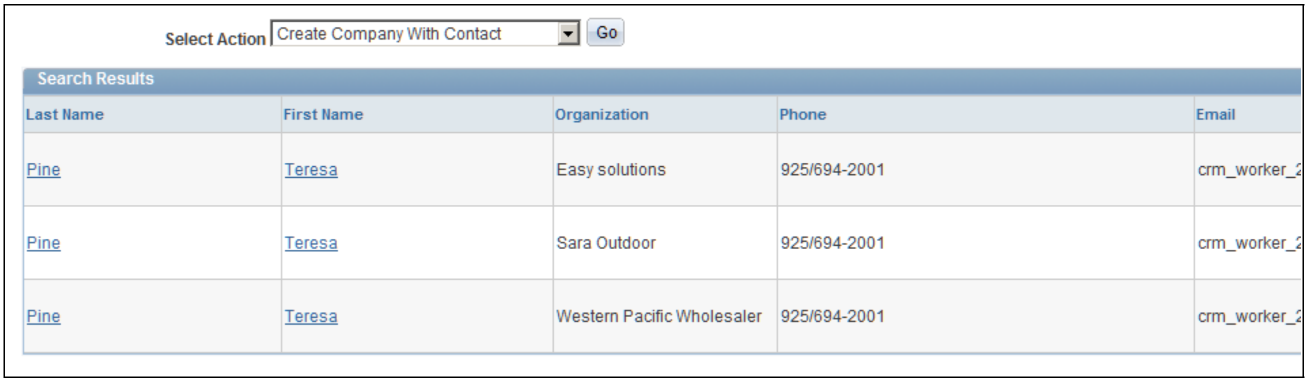
**Note.** This search uses the customer identification framework.

---

See  and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Using Business Object Search and Quick Create Functionality," Customer Identification.

### *Search Results*

If more than one match for the search criteria that you enter is found, then all business objects that match the search criteria appear in the Search Results page region. If only one record matches the search criteria, then the 360-Degree View page for that object appears.




Search for Customer: Search Results page

For business objects that are contacts of either customers or partners, one row appears in the Search Results page region for each customer or partner that the individual represents. The Name column that appears in the row for an individual identifies the company that the individual represents, and the Consumer column identifies the consumer that the individual represents. If both the Name and Consumer columns in a row are blank, then the individual listed in the row is a consumer.

**Select Action**

Select a role to create from the list of available roles.

The system determines the available roles from the search criteria that you entered. For example, suppose that you enter a value in the Organization field, the available role is *Company*, but if you enter a value in either the First Name or Last Name field, the available roles are the roles that are associated with the individual business object type: *Create Company with Contact*, *Create Consumer*, *Create Consumer with Contact*, or, if appropriate for the 360-degree view being used, *Create Worker*.

To use this functionality, you must have previously set up Quick Create for that object. Once you create the new business object, the system transfers you to the 360-Degree View page automatically, using the newly created business object.

### *See Also*

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Using Business Object Search and Quick Create Functionality"

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Using Business Object Search and Quick Create Functionality," Searching for Business Objects

## Managing Overall Activity for a Business Object

This section discusses how to manage overall information for a business object.

### *See Also*

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Working with the Relationship Viewer"

Chapter 23, "Working with Tasks," page 423

## Pages Used to Manage Overall Activity for a Business Object

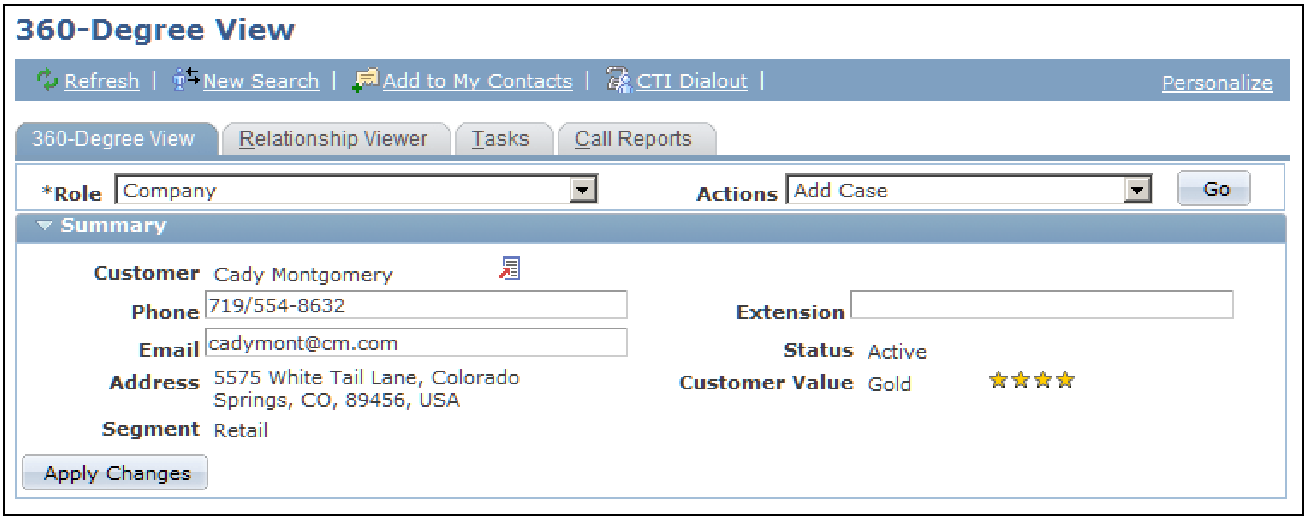
| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| 360-Degree View | RB_TD_AGENT_VIEW | • Customer 360-Degree View, Search for Customer<br>Select an existing customer.<br>• Constituent 360-Degree View, Search for Customer<br>• Partner 360-Degree View, Search for Partner<br>Select an existing partner.<br>• Worker 360-Degree View, Search for Worker<br>Select an existing worker.<br>• HRHD Worker 360-Degree View, Search for Worker<br>Select an existing worker. | Manage overall activity for the business object. |
| 360-Degree View - Relationship Viewer | RB_TD_REL_VIEWER | Access the 360-Degree View page.<br>Select the Relationship Viewer tab. | View the relationships for the business object whose information appears on the 360-Degree View page. |
| 360-Degree View - Tasks | RB_TD_TASK_LIST | Access the 360-Degree View page.<br>Select the Tasks tab. | Maintain the tasks that are associated with the business object whose information appears on the 360-Degree View page. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| 360–Degree View - Call Reports | RD_TD_CR_LIST | Access the 360–Degree View Page. Select the Call Reports tab. | Maintain the call reports that are associated with the business object whose information appears on the 360–Degree View Page. |

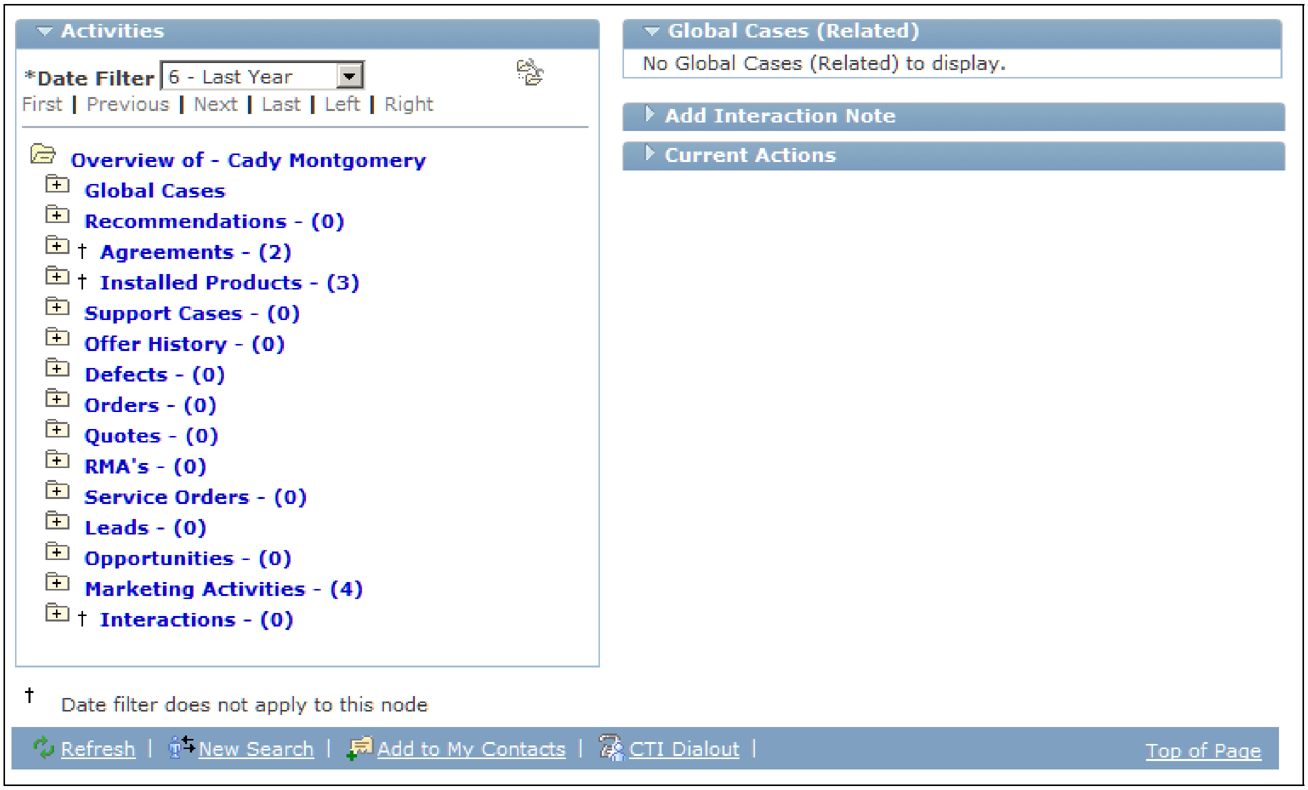
## Managing Overall Activity for a Business Object

Access the 360-Degree View page (Customer 360-Degree View, Search for Customer).




360-Degree View page (1 of 2)




360-Degree View page (2 of 2)

**Role**

Select a role that is listed for the customer, partner, worker or contact. The profile changes to reflect data that is relevant to that role.

---

**Note.** Not all roles of an individual will be displayed on all versions of the 360-Degree View page. For example, the consumer role will not be displayed on the Worker 360-Degree View page or the HRHD Worker 360-Degree View page. If the individual whose information is being viewed in the Worker 360-Degree View page also has a consumer role, use the left hand navigation to open the Customer 360-Degree View page and search again for that individual.

Similarly, the worker role will not be displayed on the Customer 360-Degree View page. If the individual whose information is being viewed in the Customer 360-Degree View page also has a worker role, use the left hand navigation to open the Worker 360-Degree View page and search again for that individual.

---

**Actions**

Select the action that you want to perform from the 360-Degree View. Delivered values include *Add Case*, *Add Defect*, *Add Install Product*,*Add Lead*, *Add Opportunity*, *Add Order*,*Add Quote*,*Add Service Order*,*Installed Product Hierarchy*,*Add Quote*, *Add RMA* (return material authorization), *Product Registration*,*Student Service Center*,*Person Profile*, and *Add Case - Admissions Status Inquiry*. The particular actions shown depends on the 360-degree view being used.

**Phone, Email,** and **Extension**

Enter new data to update customer, partner, worker, and contact profile information. Click the Apply Changes button to enter and permanently update the changes.

The ability to enter or edit data in these fields is configurable. Users who are not able to edit these fields will still see the existing values listed in display-only format.

---

**Note.** On the Constituent 360-Degree View, the labels for phone, email and address may also indicate the corresponding type, such as *Dorm Phone, Campus Email,* or *Home Address.*

---

The following fields appear in the Summary region only for the Constituent 360-Degree View when viewing information for a consumer (academic constituent):

**[Family Educational Rights and Privacy Act (FERPA) indicator]**

The FERPA indicator icon enables the user to view details about the restrictions that the student has requested regarding the disclosure of certain types of directory information. Clicking the icon transfers the user directly to the Campus Community FERPA page.

**[Positive Service indicator] and [Negative Service indicator]**

The Positive and Negative Service indicator icons enables the user to view details about the service restrictions or service privileges associated for each indicator. Clicking an icon transfers the user directly to the Manage Service Indicators page in Campus Solutions.

**[Affiliations indicator]**

Click the Affiliations icon view details regarding the academic constituent's affiliations.

**ID**

This is the automatically generated ID from Campus Solutions used to identify the constituent within the PeopleSoft Campus Solutions system.

**Campus ID**

This is the ID selected by the academic institution to identify the constituent (for example, for use on student identification cards).

**Current Status**

Displays the current academic status for the constituent. Separate statuses are shown for each combination of institution and career for the most recent applicable term. Only the most advanced status is shown for each institution and career combination. The available status values are (from lowest to highest): *Suspect*,*Prospect*,*Applicant*,*Student*, and *Alumnus.*

If the same status exists in multiple institution and career combinations, only that for the most recent status date or source date is shown. If the dates are the same, then only the status from the institution/career in first alphabetical order is shown.

**Deceased**

This text appears in the summary area if the individual consumer whose information is being viewed is deceased.

If the consumer is deceased, no FERPA, Service Indicator, or Affiliations icons will be displayed for the individual.

### *Activities*

This region contains the 360-Degree View Tree, which displays all activities and interactions with the customer.

Activities are grouped by transaction type. Expand the folder or icon next to a transaction type to view activities for that transaction type.

Depending on the way the system is configured, you can add transactions or search for transactions of a particular type. Click a detail link to access transaction detail or click the activity summary to view a grid that lists summary information about the transactions.

| | |
|---|---|
| **Date Filter** | Select the date filter for the activities that you want to view. Values are *1 - Today, 2 - Yesterday, 3 - Last Week, 4 - Last 2 Weeks, 5 - Last Month, 6 - Last Year,* and *7 - View All.*<br>If you select *6 - Last Year* and the tree header has a maximum date filter of *5 - Last Month,* the system stops the user from viewing records that are older than the maximum date filter criteria.<br>If you select *7 - View All* and you don't enter maximum date filter criteria in the tree header, the system displays all of the records.<br>When the 360-Degree View page initially appears, the date range that you specify in the profile of the user who is currently accessing the system appears by default. If the user's profile is not available, the system displays the activities for the date range that you specify in the tree. When defining the tree, you specify the date filter and maximum date filter to use when displaying this page.<br>See  and Chapter 18, "Setting Up the 360-Degree View," Setting Up the 360-Degree View Tree, page 306. |
| **From** and **Through** | Enter the date range for the information that you want to see on the 360-Degree View. After you enter the date range, click the Go button.<br>**Note.** The system displays the From and Through fields on this page only after you enable data filtering on the 360-Degree View - Personalize page. |
| **First, Previous, Next, Last, Left** and **Right** | Click to navigate the Activities tree. Navigation links become active if the number of items included in the tree or the length of these tree items exceeds the limit that can be displayed at any given time. |

### *Activities Detail*

The system displays a dynamic grid that lists key information from the most recent transactions and associated actions for the activity type that you click in the 360-Degree view tree.

The label for this grid changes depending on the type of information you view. For example, when you expand the Agreements node in the 360-Degree view tree, and then click the Active child node, the system displays the Agreements-Active dynamic grid and shows important information from agreement records. It can also provide an action link for further interactions concerning an agreement, such as viewing its details. You can configure the associated actions, the number of transactions, and the columns that appear in this grid.

---

**Note.** For performance reasons, a maximum of 100 entries will be retrieved for display in the dynamic grid at any one time.

---

See  and Chapter 18, "Setting Up the 360-Degree View," Defining Dynamic Grids, page 329.

### *Log Interaction Note*

The fields in the Log Interaction section capture the details of an interaction.

Every time that you record a subinteraction on this page, the system groups the subinteractions into one related interaction. You can perform multiple subinteractions for a customer at one time before you leave this page. The subinteractions that you created previously appear in the Current Actions group box.

---

**Note.** Interactions that are automatically generated through correspondence management are not related to the values in the drop-down menus on the 360-Degree View page. Interactions that are generated through correspondence management do not appear in reports that track which contact methods are used most often by agents for interactions with customers or contacts through the 360-Degree View page.

---

| | |
|---|---|
| **Contact Method** | Select the contact method for the interaction. Delivered values include *Inbound Chat, Inbound Email, Inbound Fax, Inbound Phone, Inbound Web, Outbound Email, Outbound Fax,* and *Outbound Phone.* |
| **Interaction Status** | Select the interaction status. Delivered values include *Busy*, *Callback*, *Child Answered, Completed, Do Not Call Again, In Progress*, and *No Answer.* |
| **Callback Date** and **Callback Time** | Enter a date and time for callback. |
| **Add Note** | Enter a note to add to the interaction. The note is saved in the 360-Degree View Tree as a subinteraction. |
| **Email Note** | Click to send the note to the customer. |

### *See Also*

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Person Business Objects"

## Viewing Customer Relationships

Access the 360-Degree View - Relationship Viewer page (Access the 360-Degree View page. Select the Relationship Viewer tab).

See  and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Working with the Relationship Viewer."

## Maintaining Customer Tasks

Access the 360-Degree View - Tasks page (Access the 360-Degree View page. Select the Tasks tab).

See  and Chapter 23, "Working with Tasks," page 423.

Part 5

# Self-Service for Customers



## Chapter 20

# Setting Up Customer Self-Service

This chapter provides an overview of customer self-service features for PeopleSoft CRM Order Capture and discusses how to:

- Set up guest IDs to access self-service sites.
- Set up user registration features.
- Set up Contact Us features.
- Set up product registration.

## Understanding Customer Self-Service Setup

This section discusses:

- Self-service sites.
- Self-service user registration.
- Contact Us notifications.
- Product registration.

### Self-Service Sites

Several aspects of a self-service site are controlled by characteristics of the user ID that provides site access. When users first access a site, they are logged on to the site with a guest ID. This guest ID is specified in the site's configuration properties file or defined on the query string of the uniform resource locator that one uses to access the site. By setting up multiple guest IDs with different characteristics, you can create multiple self-service sites.

For example, you may want to create an English site and a Spanish site. Or you may want to create a European site that uses a European business unit, and a U.S. site that uses a U.S. business unit. You might even want to create multiple European sites that use different languages but that all point to the same European business unit. To accomplish all of this, create multiple guest IDs with the appropriate characteristics.

If you set up multiple guest IDs, the self-service sign in page enables users to switch between guest IDs. For example, if you set up guest IDs for different languages and use language names as IDs descriptions, then visitors can select from a list of languages. The system stores the label for the field that visitors use to select a guest ID in the message catalog to make it easy for you to change the label to suit your business needs.

### *Site Branding*

You can create distinctive Web sites for your company's self-service sites by setting them up as branded sites. Use PeopleSoft Portal Pack to quickly implement a portal with your own "look and feel," or branding.

### *See Also*

*PeopleSoft Portal Pack 9.1 PeopleBook*, "Getting Started with PeopleSoft CRM Portal Pack"

## Self-Service User Registration

A self-service user registers in one of these three ways, each of which is secured differently:

1. Existing customer.

   Customers who already exist in the system can add a self service user login for their account. To do so, they must enter information that you define to identify them as a current customer. After the system verifies their status, they must enter only a password to establish a self-service user ID. The system obtains other information from their existing customer record.

2. New customer.

   This is for new self service users who can be consumers or businesses. You must set up a guest account to handle each type of user that might register for self service because new user logins take their defaults from the guest account.

   Security is controlled by the privileges that you establish and assign to guest user IDs. A user first signs on using a guest ID that you provide. When the user registers, the system clones the currently active guest ID and all its access privileges to create the new user ID, and then creates the necessary customer or consumer record in the CRM database.

3. Contact of an existing customer company.

   A contact of an existing company can register as a business user who represents a customer company by entering a key that you define and provide to them.

To register, users are required to read and accept terms of service and a privacy policy that you set up.

### *User Passwords and Password Hints*

A user can add a password hint question and answer when they register. This enables users who forgot their passwords to request new passwords after answering a hint question. A user can also change their password hint.

To enable this feature, you must set up forgotten password email text at the system level. Additionally, the user must:

- Have a primary email address.
- Establish a password hint during registration or through the Name and Sign In maintenance pages.
- Be associated with a permission list that permits the password to be emailed.

PeopleSoft CRM uses logic that is provides by PeopleTools to store the hint and answer, verify the hint that the user enters, and email the new password to the user.

See *PeopleTools 8.52: Security Administration PeopleBook*

### See Also

Chapter 4, "Setting Up Security and User Preferences," Implementing Self-Service Security, page 100

## Contact Us Notifications

Registered users (but not guest users) use the Contact Us page to send messages to you. When customers send messages, they select from a list of subjects and topics (subcategories of subjects) that you define to identify the message subject. When the customer submits the message, the system:

- Captures the message as an interaction that is visible through the 360-Degree View and other interaction lists.
- Notifies designated people that the message is submitted.

The system determines whom to notify based on the workflow action that you associate with the subject and topic of the message. The workflow action also determines whether notifications are sent to worklists or to email addresses.

Worklist notifications automatically include a link to the Interaction page; email notifications include a link only if the email template is so configured. The PeopleSoft-delivered CONTACT US FORM email template includes this link.

To take maximum advantage of interaction functionality, use the 360-Degree View to manage all follow-up communications. Using the 360-Degree View ensures that the system captures all follow-up communications as interactions. A direct email response bypasses the system and is not captured as an interaction.

### Contact Us Chat

If the self-service page is enabled, , a registered self-service customer can request a live chat. This request opens the customer chat window, a browser-based window that does not require a client install or applet download.

Agents receive chat requests through the MultiChannel Console, which enables them to manage multiple simultaneous chat sessions. When an agent accepts a chat request, the agent chat window opens. Agents can conference peers and supervisors into the chat, and transfer chat sessions to other agents or queues. Agents can also initiate chats with other agents on their buddy lists.

### See Also

*PeopleSoft CRM 9.1 Multichannel Applications PeopleBook*, "Working with Chat in PeopleSoft CRM"

## Product Registration

Self-service users can register products online through PeopleSoft Customer Self-Service and 360-Degree View. When a customer signs in and selects to register a product, the system populates the Product Registration page with two lists:

- Existing products

  The Existing Products section of the Product Registration page lists installed products that are already registered and their registration dates. Users click a registered product link to update the registration information or select an unregistered product to register.

- New products

  Contains product catalogs, a product list, or both. The customer uses these to locate the product to register.In addition to registering products that already have installed products that are created for them, users can also use product catalogs to register new products. Product catalogs group products in a hierarchical fashion, which provides simple navigation for users to locate new products. As an administrator, you select product catalogs from the system to appear in the New Product section of the Product Registration page. Users can then drill down on any listed catalog to look for the products they want to register without having to remember and enter product names. You can also set up new catalogs that are specific for product registration. When users submit the registration, the system creates new installed products with the *Installed* status for products that users select from the new product list. For registered products, users select from the existing product list. The system updates the associated installed products with the information (date of registration, serial ID, and so on) that it collects from the product registration. You can specify what installed product fields are available for display or editing on the Product Registration - Product Registration Details page. You can also configure the system to display only installed products of certain statuses. This enables you to limit the registration process to installed products for which product registration makes sense; for example, if you don't want users to register an installed product that is canceled or uninstalled. Only registered users can register products through PeopleSoft Customer Self-Service.

---

**Note.** If the quantity of an installed product is greater than one, and they are under different statuses, the installed product appears in the Existing Products section if any one of those statuses is in the status list that you specify on the Product Registration Setup page.

---

### *Product Registration Using the 360-Degree View*

Customer service representatives (CSRs) can register products for customers through the 360-Degree View. CSRs can view and update any existing installed products or select *Product Registration* in the Go To field on the page to register products for customers who call them on the phone.

### *See Also*

Chapter 4, "Setting Up Security and User Preferences," Implementing Self-Service Security, page 100

Chapter 20, "Setting Up Customer Self-Service," Setting Up Product Registration, page 365

Chapter 21, "Working with Customer Self-Service Transactions," Registering Products, page 404

# Setting Up Guest IDs to Access Self-Service Sites

This section discusses how to:

- Define guest IDs.
- Change the label of the guest ID selection field.

## Defining Guest IDs

To define a guest ID:

1. Define the ID in the PeopleTools User Profiles component.

   Access the User Profiles component from PeopleTools, Security, User Profiles, User Profiles.

   On the General page, enter the language code that is associated with the ID. Anyone who logs on with a guest ID sees all of the pages that are in the associated language code.

   On the ID page, enter the description that self-service users see in the guest ID selection field. For example, if you support multiple languages and you define language-based user IDs, the descriptions might be the language names.

   See *PeopleTools 8.52: Security Administration PeopleBook*

2. Establish the ID as a guest ID on the User Registration Setup page.

   Access the User Registration Setup page from Set Up CRM, Security, Self Service, User Registration.

   This is the step that makes the ID into a guest ID that enables personal and business user registration. That is, the self-service Sign In page enables users to select from IDs that have a user registration definition.

   See  and Chapter 4, "Setting Up Security and User Preferences," Implementing Self-Service Security, page 100.

3. Define preferences for the guest ID on the User Preferences page.

   Access the User Preferences page from Set Up CRM, Security, User Preferences.

   Select a default business unit and market for the guest. If you do not select a business unit, the system uses the default PeopleSoft Order Capture business unit (as established on the Order Capture Definition page).

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

### *See Also*

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

## Changing the Label of the Guest ID Selection Field

To change the label of the guest ID selection field:

1. Access the message catalog from PeopleTools, Utilities, Administration, Message Catalog.
2. Look up message set number *18068,* whose description is *Self Service Common.*
3. Click Find and enter message number *19* in the search string.

   The field label text appears. The default is *Select a different site to browse.*
4. Enter an alternative label for the guest ID selection field.

   For example, if the guest IDs are for different languages, you might enter *Select a language.*
5. Save the changes.

# Setting Up Contact Us Features

To set up contact us features, use the Contact Us Topic (SUBJECT_TABLE) and Contact Us Subject (SUBJECT_TOPIC_TBL) components.

This section lists prerequisites and discusses how to:

- Specify chat features for Contact Us pages.
- Define topics.
- Define subjects and Contact Us workflow.

## Prerequisites

When customers use the Contact Us page to communicate with you, they select from a predefined list of subjects and topics. When they submit the message, the system sends a notification to a designated person. You set up this workflow for each subject and topic combination that you define.

Before you create subjects and topics, you must define the workflow actions and workflow email templates that are to be used for these notifications.

Customers can also elect to open a chat with a customer service representative if you have enabled the chat feature and specified a chat profile and agent popup for on the self-service page.

### *See Also*

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook,* "Setting Up PeopleSoft CRM Workflow," Defining Workflow Actions for Business Projects

*PeopleSoft CRM 9.1 Multichannel Applications PeopleBook,* "Working with Chat in PeopleSoft CRM"

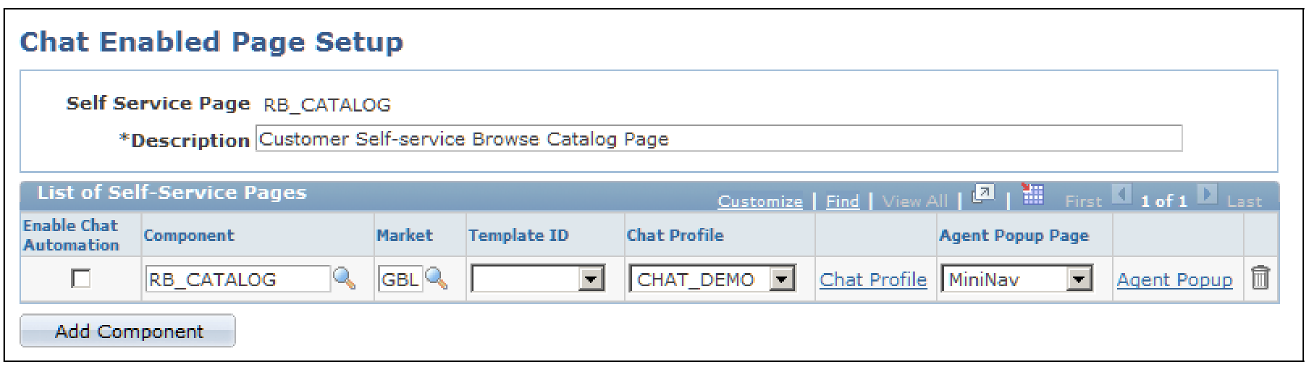
 

## Pages Used to Set Up Contact Us Features

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Chat Enabled Page Setup | RB_CHAT_ADMIN | Set Up CRM, Product Related, Multichannel Definitions, Chat, Chat Page Setup, Chat Enabled Page Setup | Specify chat features for Contact Us pages. |
| Contact Us Topic | CONV_SUB_TOPIC_TBL | Set Up CRM, Common Definitions, Contact Us, Contact Us Topic, Contact Us Topic | Define topics that customers select when requesting that you contact them. |
| Contact Us Subject | SUBJECT_TABLE | Set Up CRM, Common Definitions, Contact Us, Contact Us Subject, Contact Us Subject | Define subjects that customers select when requesting that you contact them, and set up workflow for each subject. |

## Specifying Chat Features for Contact Us Pages

Access the Chat Enabled Page Setup page (Set Up CRM, Product Related, Multichannel Definitions, Chat, Chat Page Setup, Chat Enabled Page Setup).



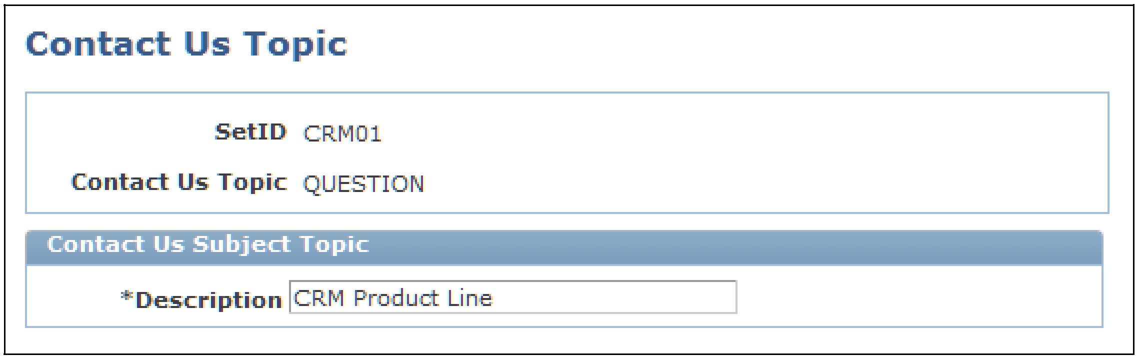

Chat Enabled Page Setup page

### *See Also*

*PeopleSoft CRM 9.1 Multichannel Applications PeopleBook*, "Working with Chat in PeopleSoft CRM"

## Defining Topics

Access the Contact Us Topic page (Set Up CRM, Common Definitions, Contact Us, Contact Us Topic, Contact Us Topic).

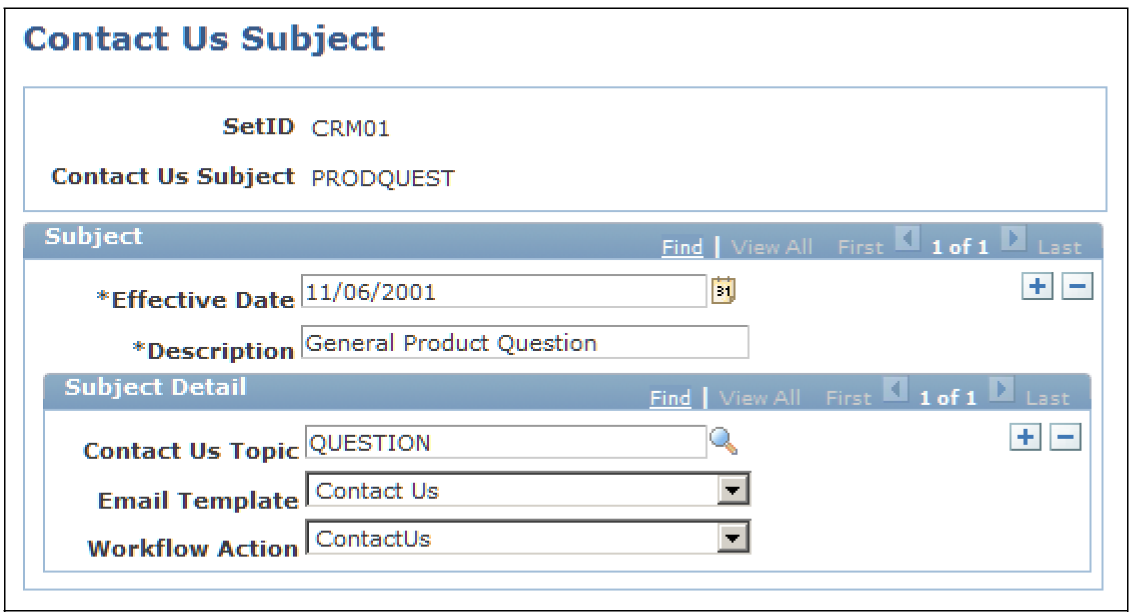



Contact Us Topic page

Specify a topic and topic description. You associate the topics with Contact Us subjects to enable users to select the subject and topic for a particular Contact Us request.

## Defining Subjects and Contact Us Workflow

Access the Contact Us Subject page (Set Up CRM, Common Definitions, Contact Us, Contact Us Subject, Contact Us Subject).




Contact Us Subject page

When you define a subject, specify the associated topics and the workflow objects (a workflow action and correspondence template) that the system uses to deliver the customer's request to a particular worklist.

| | |
|---|---|
| **Effective Date** | Enter the effective date of the email template data. |
| **Description** | Enter a description of the subject (up to 36 characters). |
| **Contact Us Topic** | Select topics to associate with this subject. |

**Email Template**

For each subject and topic combination, select the correspondence template that the system uses to create the text in its email notifications. Delivered templates are *Contact Us* and *Contact Us Confirmation.*

Use the correspondence management framework to define correspondence templates and packages for use in the Contact Us feature. To add new templates, makes sure that the *Contact Us* usage is specified in their associated template packages.

**Workflow Action**

For each subject and topic combination, specify the workflow action that the system uses to send a notification that alerts a worker to the newly submitted message.

# Setting Up Product Registration

To set up product registration features, use the Product Registration (RF_PROD_REG_SETUP) table.

This section discusses how to set up product registration features.

### *See Also*

Chapter 20, "Setting Up Customer Self-Service," Product Registration, page 360

Chapter 21, "Working with Customer Self-Service Transactions," Registering Products, page 404

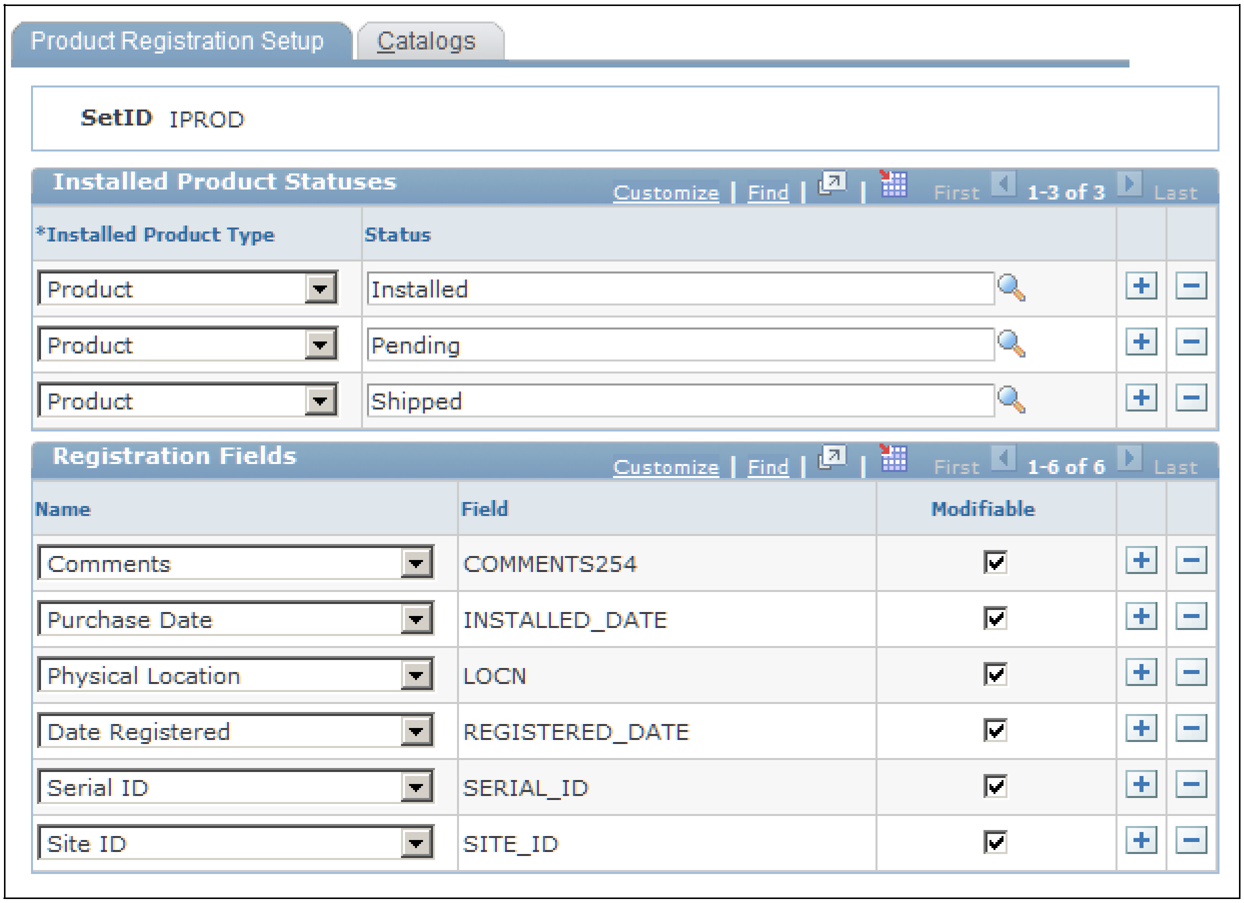
## Pages Used to Set Up Product Registration for Self-Service Users

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Product Registration Setup | RF_PROD_REG_SETUP | Set Up CRM, Common Definitions, Product Registration, Product Registration Setup | Configure the registration page for installed products. |
| Catalogs | RF_PROD_REG_SETUP2 | Set Up CRM, Common Definitions, Installed Product, Product Registration, Catalogs | Select product catalogs that self-service users can use to search for and register products. |

## Configuring Installed Product Registration

Access the Product Registration Setup page (Set Up CRM, Common Definitions, Installed Product, Product Registration, Product Registration Setup).




Product Registration Setup page

### Installed Product Statuses

Specify the statuses for which installed products (that belong to the self-service user) appear in the Existing Products section of the Product Registration page.

---

**Note.** Product registration setup is keyed to setID.

---

**Status** Select the status for installed products to appear on the Product Registration page.

### Registration Fields

Define the installed product fields that appear to self-service users on the Product Registration Details page and whether the fields are modifiable or read-only. The system uses this information as default values on the Installed Product page of the Product Definition component. When a product requires a different set of fields to appear to self-service users, you can override the default fields in the Product Definition component.

**Name**

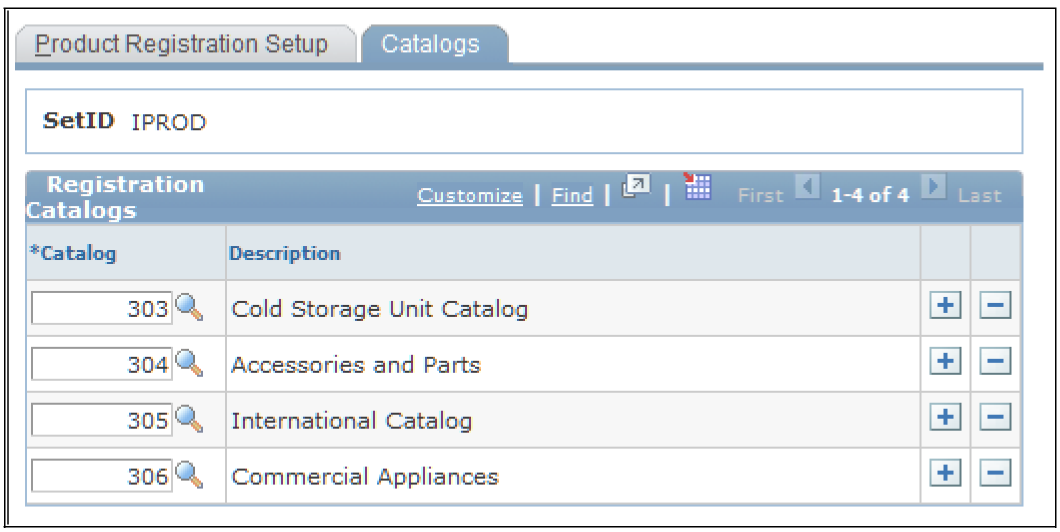
Select the field to appear on the Product Registration Details page. Values are *Account Number*, *Agreement Code*, *Asset Subtype*, *Asset Tag*, *Authorization Code*, *Comments*, *Date Registered*, *Department*, *Distributor*, *Distributor Contact*, *Environment*, *Install Type*, *Item Shipping Date*, *Network*, *Operating System*, *Operating System Version*, *Order Date*, *Ownership*, *Physical Location*, *Platform*, *Purchase Date*, *Serial ID*, *Site ID*, and *User Interface*. The system uses this value as the name of corresponding fields that you see on the registration page.

**Modifiable**

Select to enable users to modify the corresponding field. Clear this check box for fields that need to be read-only when updating previously registered products on the Product Registration Details page. When registering a product for the first time, users can modify all fields except the product description and the registration date, whether or not you select this check box.

### *Specifying Registration Catalogs*

Access the Catalogs page (Set Up CRM, Common Definitions, Installed Product, Product Registration, Catalogs).




Catalogs page

**Catalog**

Select a product catalog that self-service users can access in the New Product section of the Product Registration page.

## Chapter 21

# Working with Customer Self-Service Transactions

This chapter provides an overview of customer self-service and discusses how to:

- Sign in to PeopleSoft CRM self-service.
- Register as a personal or business user.
- Select the customers that business users represent.
- Maintain name and sign-in information.
- Maintain contact information.
- Maintain contact address books.
- Maintain consumer contact and address information.
- Maintain consumer address books.
- View internal contacts.
- Send Contact Us messages.
- Register products.

---

**Note.** You can access several of the pages that are discussed in this chapter from the pagelets in PeopleSoft CRM Portal Pack.

---

### *See Also*

*PeopleSoft Portal Pack 9.1 PeopleBook*, "Working with PeopleSoft CRM Self-Service Pagelets"

## Understanding Customer Self-Service

Self-service transactions enable customers to access information and transact business online. PeopleSoft CRM provides transactions for self-service users to:

- Register and sign in.
- Maintain their user profile (information about themselves and their relationship with you).

- Send messages to you or to chat live online with a customer service representative (CSR).
- Register products.
- Perform application-specific functions such as ordering products and submitting support cases.

This chapter describes how users register, sign in, maintain their profiles, contact you, and register products. It also discusses the differences between self-service for consumers (personal users) and for contacts (business users). Application-specific transactions are described in the corresponding application PeopleBooks.

### *See Also*

*PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working With Order Capture Self Service"

*PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Working with Self-Service Application Transactions"

## Self-Service Access for Higher Education

The CRM system exposes several self-service components and pages in the employee portal to make some of the self-service features available to Higher Education users in a non-self-service environment. These self-service objects are:

- Sign In page.

  See and Chapter 21, "Working with Customer Self-Service Transactions," Signing In to PeopleSoft CRM Self-Service, page 373.

- Contact Us page.

  See and Chapter 21, "Working with Customer Self-Service Transactions," Sending Contact Us Messages, page 403.

- Customer Registration page.

  See and Chapter 21, "Working with Customer Self-Service Transactions," Registering as an Existing Customer, page 378.

- Contact Directory (internal contacts) page in the Service Center folder.

  See and Chapter 21, "Working with Customer Self-Service Transactions," Viewing Internal Contacts, page 402.

- Change Profile Info component in the Manage Profile folder.

  See and Chapter 21, "Working with Customer Self-Service Transactions," Maintaining Name and Sign-In Information, page 380.

- Default Addresses component in the Manage Profile folder.

  See and Chapter 21, "Working with Customer Self-Service Transactions," Maintaining Contact Information, page 382.

- Address Book component in the Manage Profile folder.

  See  and Chapter 21, "Working with Customer Self-Service Transactions," Maintaining Consumer Address Books, page 399.

## Roles and Permission Lists

The system delivers new roles and permission lists that grant self-service page access to Higher Education users in the employee portal.

### *Role Update*

New roles are created and need to be assigned to Higher Education user IDs in order to access self-service pages in the employee portal. These roles are:

- *HE Self Service* - *Common* role.

  The system assigns this role to all delivered Higher Education user IDs (with the *SSS* prefix) except for marketing-specific ones.

- *HE Self Service* - *Profile* role.

  Assign this role to user profiles for suspect prospect users. By default, this role is assigned to the delivered SSS_SUSP_PROSP user ID.

  This role is associated with the CRHE1610 permission list.

- *HE Self Service* - *Faculty* role.

  Assign this role to user profiles for faculty users to ensure proper page access, for example, the Faculty Center, Internal Contacts page and the Contact Us page. By default, this role is assigned to delivered user IDs such as SSS_AA00100 and SSS_FACULTY.

- *HE Self Service* - *Student* role.

  Assign this role to user profiles for student users and applicant users to ensure proper page access, for example, the Student Center, Internal Contacts page and the Contact Us page. By default, this role is assigned to delivered user IDs such as SSS_AA00100 and SSS_CONST.

### *Permission List Update*

Permission lists are created and updated to grant page access to Higher Education users. Permission lists relate to user IDs through roles.

- CRHE1600 (HE Service Center Self Service) permission list: updated to include CRM_PORTAL_COMPONENTS (CRM Portal Components) menu. In this menu, Internal Contacts (WC_CNTACT_DIR_COMP) and Contact Us (WC_CONTACT_US) will be authorized

- CRHE1610 (HE Manage Profile Self Service) permission list: newly added. Includes the RB_SELF_SERVICE (CRM Self-Service) menu.

## Self-Service Page Visibility

This table shows, as delivered, the self-service components and page that are visible in the employee portal by user type:

| ***User Type*** | ***Sign In page*** | ***Contact Us page*** | ***Customer Registration page*** | ***Manage Profile folder*** | ***Internal Contacts page*** | ***Student Center*** | ***Faculty Center*** |
|---|---|---|---|---|---|---|---|
| Self service guest (sample user ID: *USGUEST*) | Y | Y | Y | Y | N | N | N |
| Administrator (sample user ID: *PS)* | Y | Y | Y | Y | Y | Y | Y |
| Suspect<br>(sample user ID: *SSS_SUSP_PROSP)* | N | Y | N | Y | Y | N | N |
| Prospect<br>(sample user ID: *SSS_SUSP_PROSP*) | N | Y | N | Y | Y | N | N |
| Student<br>(sample user ID: *SSS_CONST)* | N | Y | N | N | Y | Y | N |
| Applicant<br>(sample user ID: *SSS_CONST*) | N | Y | N | N | Y | Y | N |
| Faculty<br>(sample user ID: *SSS_FACULTY)* | N | Y | N | N | Y | N | Y |
| Student and Faculty<br>(sample user ID: *SSS_AA00100*) | N | Y | N | N | Y | Y | Y |

See  and *PeopleSoft CRM for Higher Education 9.1 PeopleBook*, "Getting Started with PeopleSoft CRM for Higher Education."

# Signing In to PeopleSoft CRM Self-Service

This section discusses how to sign in to PeopleSoft CRM self-service.

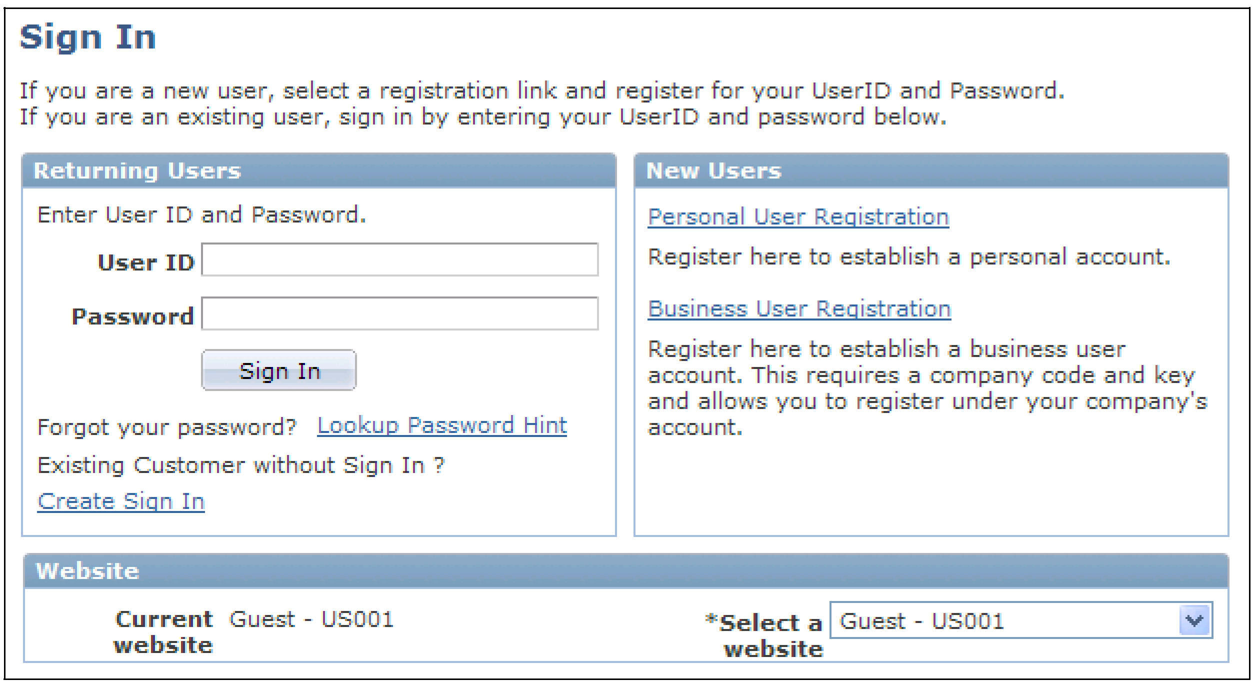
 

## Pages Used to Sign In to PeopleSoft CRM Self-Service

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Sign In | RX_LOGIN | Sign In, Sign In | Sign in to PeopleSoft CRM self-service. |
| Forgot Password | RX_EMAIL_PSWD | Click the Lookup Password Hint link on the Sign In page. | Request a password hint. |
| Forgot Password - Email New Password | RX_EMAIL_PSWD2 | Click the Continue button on the Forgot Password page. | Answer a password hint question to complete the request for a new password. |
| Confirmation | RX_EMAIL_PSWD_CNFR | Click the Email New Password button on the Forgot Password - Email New Password page. | Confirm that passwords are reset and mailed. |

## Signing In to PeopleSoft CRM Self-Service

Access the Sign In page (Sign In, Sign In).




Sign In page

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**Note.** In addition to the self-service application, this page is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

---

See  and Chapter 21, "Working with Customer Self-Service Transactions," Self-Service Page Visibility, page 372.

### *Returning Users*

Enter the User ID and Password and click the Sign In button.

If you are already set up as a customer in the CRM system but do not have a self service sign-in, click the Create Sign In link to authenticate yourself as an existing user and create a new self service user ID and password.

### *New Users*

You can register as a personal or business user.

Either personal or business user registration causes the system to create a user ID that is associated with the new consumer or contact record, which the visitor can use to sign in on subsequent visits. The user ID is cloned from the guest ID that was active when the user registered. Menu navigation options, and in some cases, page appearances depend on the user's role or roles.

| | |
|---|---|
| **Personal User Registration** | Click this link to establish a personal user ID. When a site visitor registers as a personal user, the system creates a consumer record for that user. |
| **Business User Registration** | Click this link to establish an ID as a contact for a company that is already set up in PeopleSoft CRM. When a site visitor registers as a business user, the system creates a contact record that is associated with the customer that the visitor specifies. Visitors must provide customer codes and keys that their site administrators give them for authentication purposes. |

### *Website*

When users first access the site, they are automatically logged in using the guest ID that you identify in the configuration properties file. As long as that ID has the appropriate permissions, users can use the site with limited access. Then, users can sign in with their own user IDs and passwords to further identify themselves and acquire additional access.

For example, users who accesses the site as guests can access the product catalog but cannot view order statuses. Once the users sign in, they can access both the product catalog and order statuses. Even after users sign in with their own user IDs, the guest ID controls certain site characteristics such as the site language.

| | |
|---|---|
| **Select a website** | Select a value to switch to a different ID. Depending on how you define guest IDs, the IDs may control the site language, the business unit whose data appears, or other site characteristics. You can change the delivered field label to more accurately reflect the guest ID options that you establish (for example, the Select a Location field with *United States, European Market,* and *Asia* values. If you have only one site, you can hide this section from the user). |

***See Also***

Chapter 21, "Working with Customer Self-Service Transactions," Registering As Personal or Business Users, page 375

Chapter 20, "Setting Up Customer Self-Service," page 357

## Requesting New Passwords

Access the Forgot Password page (click the Lookup Password Hint link on the Sign In page).

To request a new password, enter your user ID and click Continue.

## Completing Requests for New Passwords

Access the Forgot Password - Email New Password page (click the Continue button on the Forgot Password page).

You must correctly answer a personalized password hint question before the system creates and sends a new password.

**Email Address** The system displays your primary address, which is the address to which the system sends the new password.

**Email New Password** Click after entering an answer to complete the request.

After you click this button, a confirmation page appears.

# Registering As Personal or Business Users

This section discusses how to register as either a personal or business self-service user.

## Pages Used to Register As Personal or Business Users

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Sign In | RX_LOGIN | Sign In, Sign In | Sign in to PeopleSoft CRM self-service. |
| Personal User Registration | RX_REGISTER | Click the Personal User Registration link on the Sign In page. | Register as a personal user. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Business User Registration | RX_REGISTER_REPCHK | Click the Business User Registration link on the Sign In page. | Identify the company for a business user. |
| Register as a business user for <company> | RX_REGISTER_REP | Click the Continue button on the Business User Registration page. | Register as a business user. |
| Customer Registration | RX_REGISTER_CSTCHK | • Click the Create Sign In link on the Sign In page.<br>• Customer Registration, Customer Registration (in the employee portal for Higher Education users). | Register as an existing customer. |
| Customer Registration | RX_REGISTER_CST | Click the Continue button on the Customer Registration page. | Enter user ID and password information to complete the process of registering as an existing customer. |
| Partner Registration | RX_REGISTERPARTNER | Partner Registration | Register a partner company. |
| Registration Confirmation | RX_REGISTER_CNFRM | Click the Submit Registration button on the Registration page or the Register as a business user for <Your Company> page. | Review registration information. |

## Registering As a Personal User

Access the Personal User Registration page (click the Personal User Registration link on the Sign In page).


Personal User Registration page (1 of 2)


Personal User Registration page (2 of 2)

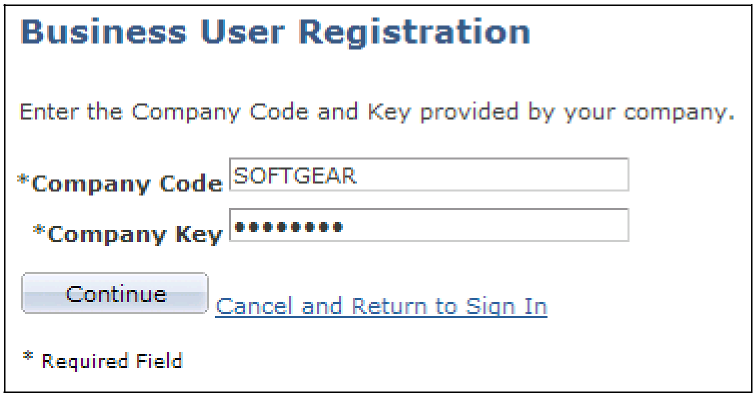
When you click the Submit Registration button, the system creates a new user ID and a new consumer record.

If a terms of service and privacy policy are set up for the self-service site, additional text containing links to these policies appears on this page. Be sure to read the terms of service and privacy policy before submitting the registration. By submitting the form, you are legally consenting to the terms in these documents.

## Identifying Companies for Business User Registration

Access the Business User Registration page (click the Business User Registration link on the Sign In page).




Business User Registration page

Set up keys on the Business User Registration Setup page. You give customers their company codes and keys, and they share the information with users whom they want to register under their company codes.

When a user registers, the new contact record is associated with the company that you specify on this page.

---

**Note.** When you set up a key, you can limit the number of times that it is used.

---

### *See Also*

Chapter 4, "Setting Up Security and User Preferences," Registering Business Users, page 106

## Registering As a Business User

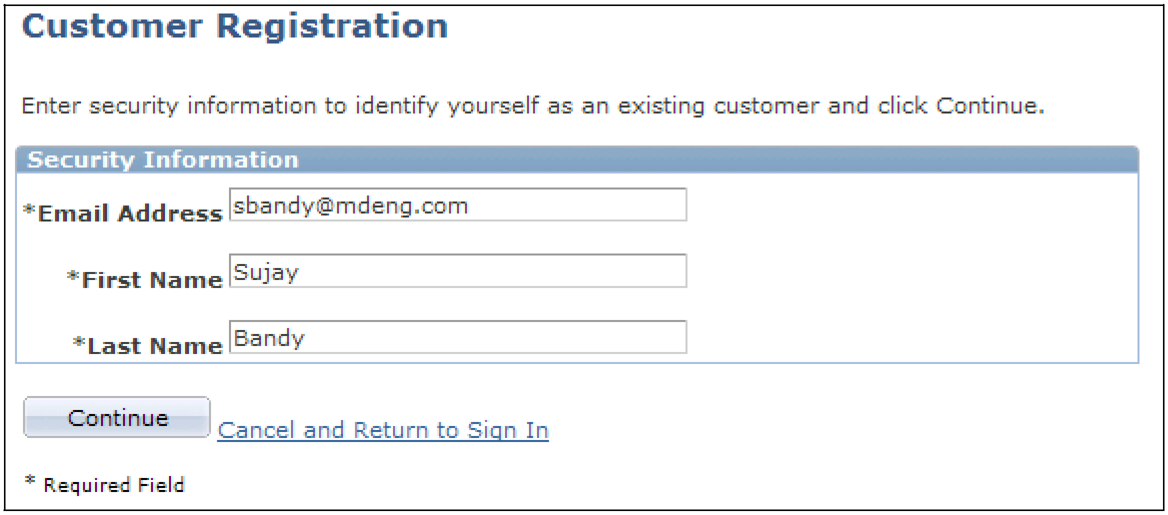
Access the Register as a business user for <company> page (click the Continue button on the Business User Registration page). This page is similar in usage to the page for registering as a personal user.

See  and Chapter 21, "Working with Customer Self-Service Transactions," Registering As a Personal User, page 376.

## Registering as an Existing Customer

Access the Customer Registration page (click the Create Sign In link on the Sign In page).




Customer Registration page

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**Note.** In addition to the self-service application, this page is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

---

See  and Chapter 21, "Working with Customer Self-Service Transactions," Self-Service Page Visibility, page 372.

If you already exist in the PeopleSoft CRM system as a customer or contact, you can register as a self-service user. You must enter information that identifies you to the PeopleSoft CRM system before you can complete the self-service registration process.

The fields that are available for entry on this page depend on how the user registration for existing customers is set up.

| | |
|---|---|
| **Continue** | Click this button to access a page where you enter sign in information, including user ID and password. |

## Reviewing Registration Information

Access the Registration Confirmation page (click the Submit Registration button on the Registration page or the Register as a business user for <Your Company> page).

One of two buttons appears here, depending on what you were doing before you registered. Click Continue Shopping to access the product catalog. Click Checkout to go directly to the checkout page.

The Continue button is not visible on the page for Higher Education users who access the page in the employee portal, the Continue button is not visible.

# Selecting the Customers That Business Users Represent

This section discusses how to select customers.

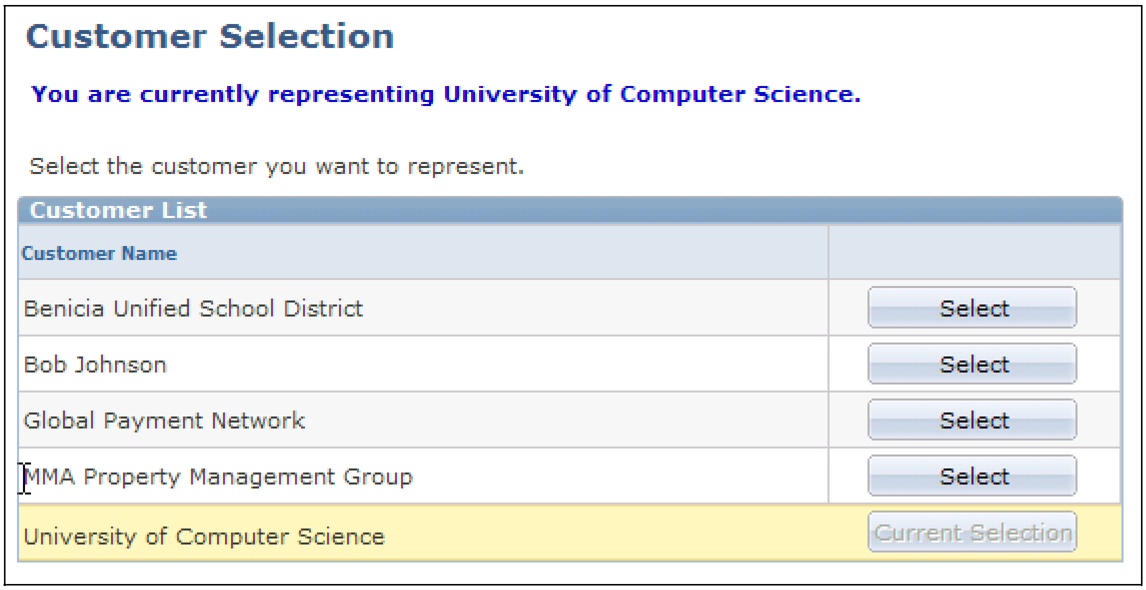
 

## Page Used to Select the Customers That Business Users Represent

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Customer Selection | CUST_SELECT | Customer Selection, Customer Selection | Select customers for the current session. This page is available for users that are set up as brokers who buy for multiple companies. |

## Selecting Customers for the Current Session

Access the Customer Selection page (Customer Selection, Customer Selection).




Customer Selection page

Select a customer from the customer list.

# Maintaining Name and Sign-In Information

This section discusses how to:

- Review name and sign-in information.
- Change names.
- Change passwords.
- Change password hints.

**Note.** This process is the same for consumers and contacts.

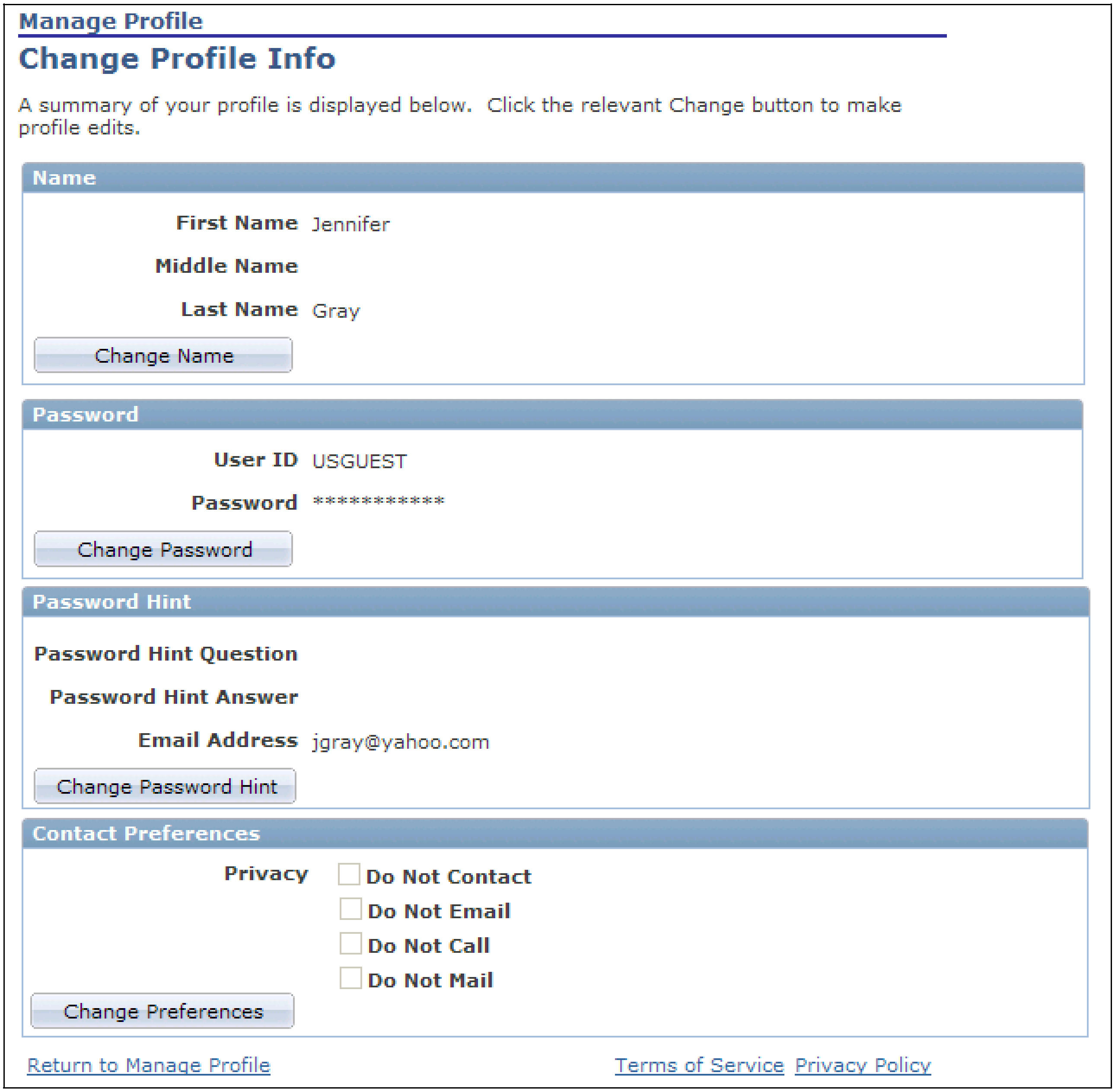
## Pages Used to Maintain Name and Sign-In Information

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Manage Profile - Change Profile Info | RX_NAME_SIGNIN | Manage Profile, Change Profile Info | Review and edit name, password information, and privacy preferences. |
| Manage Profile - Change Name | RX_NAME_CHNG | Click the Change Name button on the Manage Profile - Change Profile Info page. | Update name information. |
| Manage Profile - Change Password | RX_PSWD_CHNG | Click the Change Password button on the Manage Profile - Change Profile Info page. | Enter passwords. |
| Profile - Change Password Hint | RX_HINT_CHNG | Click the Change Password Hint button on the Manage Profile - Change Profile Info page. | Enter password hints. |
| Manage Profile - Change Privacy Preference | RX_PREF_CHNG | Click the Change Preferences button on the Manage Profile - Change Profile Info page. | Select privacy options for screening communications. |

## Reviewing Name and Sign-In Information

Access the Manage Profile - Change Profile Info page (Manage Profile, Change Profile Info).




Manage Profile - Change Profile Info page

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**Note.** In addition to the self-service application, this page is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

---

See  and Chapter 21, "Working with Customer Self-Service Transactions," Self-Service Page Visibility, page 372.

## Maintaining Contact Information

This section discusses how to maintain contact information.

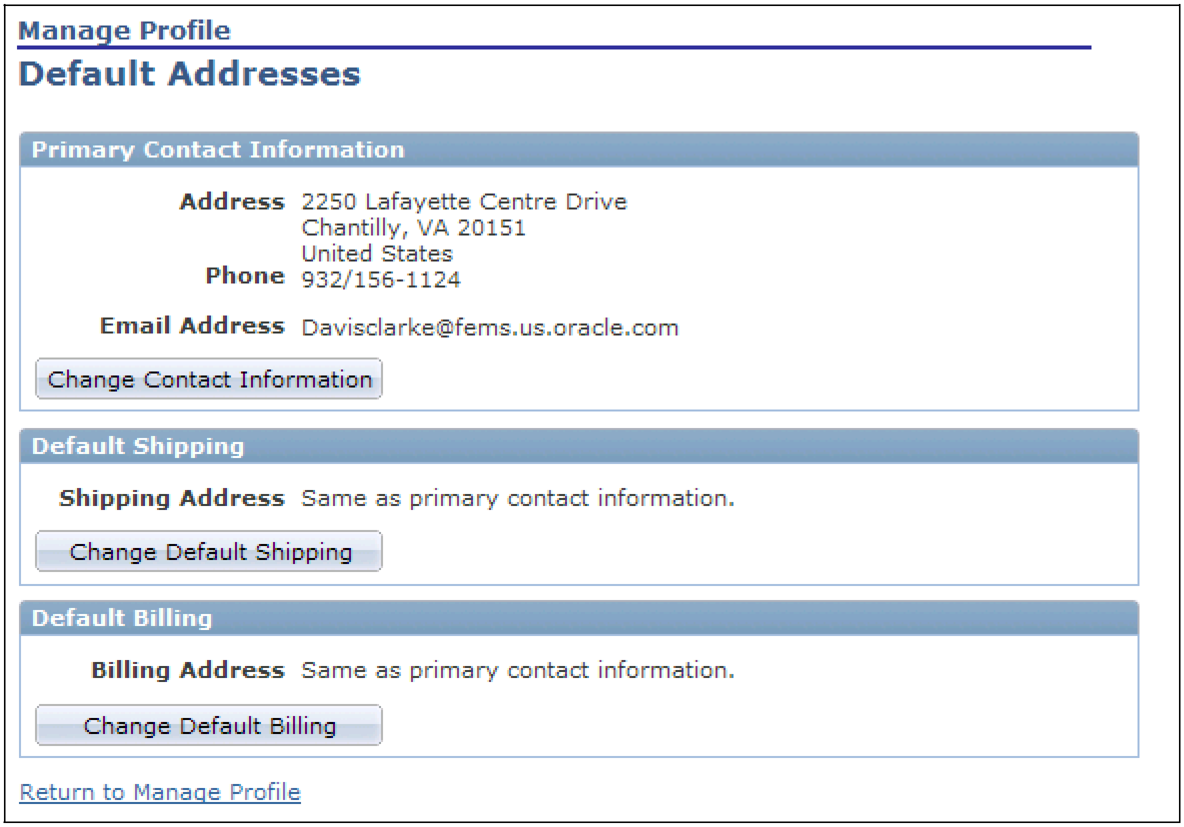
## Pages Used to Maintain Contact Information

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Manage Profile - Default Addresses | RX_PROFILE_DFLTS | Manage Profile, Default Addresses | Manage default mailing, shipping, and billing address information. |
| Manage Profile - Contact Information | RX_ADR_MY_INFO | Click the Change Contact Information button on the Manage Profile - Default Addresses page. | Update primary contact information. |
| Address Book - Create New Address<br><br>Address Book - Update Address | RX_ADR_CUST_ADDR | Click the Edit link for an existing address or the Add New Address button on the Profile - Contact Information page. | Create or update addresses that are associated with the user. |
| Delete Confirmation | RX_ADR_DEL_CONFIRM | Click the Delete link for any non-primary address, phone number, or email address on the Profile - Contact Information page. | Confirm the deletion of the address, phone number, or email address. |

## Accessing Default Address Information

Access the Manage Profile - Default Addresses page (Manage Profile, Default Addresses).




Manage Profile - Default Addresses page

---

**Note.** In addition to the self-service application, this component is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

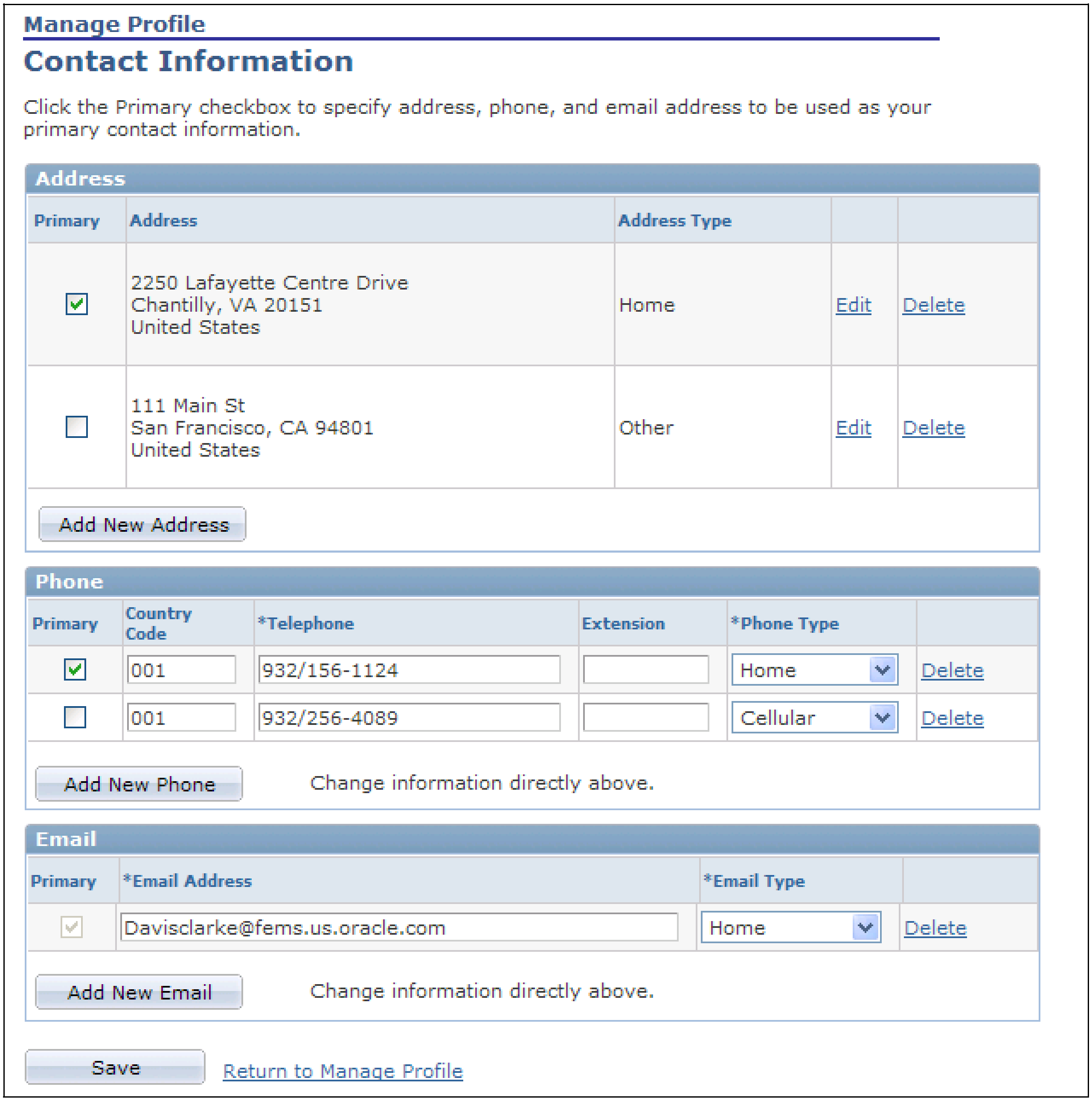
---

See  and Chapter 21, "Working with Customer Self-Service Transactions," Self-Service Page Visibility, page 372.

## Updating Primary Contact Information

Access the Manage Profile - Contact Information page (click the Change Contact Information button on the Manage Profile - Default Addresses page).




Manage Profile — Contact Information page

The Add New Address button transfers you to a page where you can add address information. The Add New Phone and Add New Email buttons add a new row to the Phone or Email grid for you to enter the new information. The user can edit their current phone numbers and email addresses directly on this page.

## Maintaining Contact Address Books

This section discusses how to:

- Review customer addresses.

- Review customer contacts.
- Review customer primary information.
- Create customers or contact addresses.
- Create customer contacts.
- Select existing contacts.
- Select existing addresses.
- Maintain name, role information, and relationship address for customer contacts.
- Update customer or contact addresses.

## Pages Used to Maintain Contact Address Books

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Address Book: View Addresses | RX_ADR_CUST_INFO | • Manage Profile, Address Book<br>• Click the View Addresses link on the Address Book (View Contacts) page or the Address Book - Customer's Primary Information page. | Review addresses that are associated with the customer. |
| Address Book: View Contacts | RX_ADR_CUST_CNTCT | Click the View Contacts link on the Address Book: View Addresses page or the Address Book - Customer's Primary Information page. | Review contacts that are associated with the customer. |
| Address Book: Customer's Primary Information | RX_ADR_CUST_DFLTS | Click the View Customer's Primary Information link on the Address Book (View Addresses) or Address Book (View Contacts) page. | Review default contacts and addresses that are used for specific purposes. |
| Address Book - Create New Address | RX_ADR_REP_ADDR | Click the Add New Address button on the Address Book - Contact Information page. | Add a new address for a contact. |
| Address Book - Create New Contact | RX_ADR_NEW_REP | Click the Add New Contact button on the Address Book (View Addresses) page or the Address Book (View Contacts) page. | Create new contacts or new addresses for the customer. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Address Book - Select Contact | RX_ADR_USE_CNTCT | • Click a Replace link on the Address Book - Customer's Primary Information page.<br>• Click the Copy Existing Contact link on the Address Book - Create New Contact page. | Select new primary contacts for the roles that appear on the Address Book - Customer's Primary Information page and to copy the contacts into new address book entries. |
| Address Book - new address - Select Address | RX_ADR_SEL_CUST_DF | • Click a Replace link on the Address Book - Customer's Primary Information page.<br>• Click the Copy Existing Address link on the Address Book - Create New Contact page. | Select new primary addresses for the address roles that appear on the Address Book - Customer's Primary Information page and copy the addresses into new address book entries. |
| Address Book - Contact Information | RX_ADR_REP_INFO | • Click the Edit link on the Address Book - Customer's Primary Information page.<br>• Click the Edit link on the Address Book (View Contacts) page. | Edit an existing contact's information. |
| Address Book - Create New Address | RX_ADR_CUST_ADDR, RX_ADR_NEW_ADDR, RX_ADR_NEW_REP | • Click the Add New Address button on the Address Book (View Addresses) page.<br>• Click the Add New Address link on the Address Book - new address - Select Address page. | Add a new address for a customer. You do not need to associate the address with a specific contact. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Address Book - Update Address | RX_ADR_CUST_ADDR, RX_ADR_REP_ADDR | • Click the Edit link on the Address Book - Customer's Primary Information page.<br>• Click the Edit link on the Address Book (View Addresses) page.<br>• Click the Edit link on the Address Book - Contact Information page for any contact who is associated with one or multiple addresses. | Modify existing addresses. |
| Delete Confirmation | RX_ADR_DEL_CONFIRM | Click the Delete link on the Address Book (View Addresses) page or on the Address Book (View Contacts) page. | Confirm that you want to delete an address or contact. A deleted address is removed from the contact's address book but remains in the system with an end date that is equal to the date on which it was deleted. |

## Reviewing Customer Addresses

Access the Address Book: View Addresses page (Manage Profile, Address Book).


Address Book: View Addresses page

Addresses that are associated with the customer appear on this page. If the address is associated with a specific site, the site name appears as well.

**Address Filter** Select *Show all addresses*, *Show billing addresses*, *Show install-to site addresses*, *Show shipping addresses*, or *Show sold-to addresses.*

**Billing, Shipping,** and **Sold To** *Primary* appears in the appropriate column for the primary billing, shipping, and sold-to addresses. *Yes* appears in the appropriate column for additional addresses. To change a company's primary addresses, access the Address Book - Customer's Primary Information page.

### *Deleting Addresses*

When you click the Delete link for an address, the Delete Confirmation page appears.

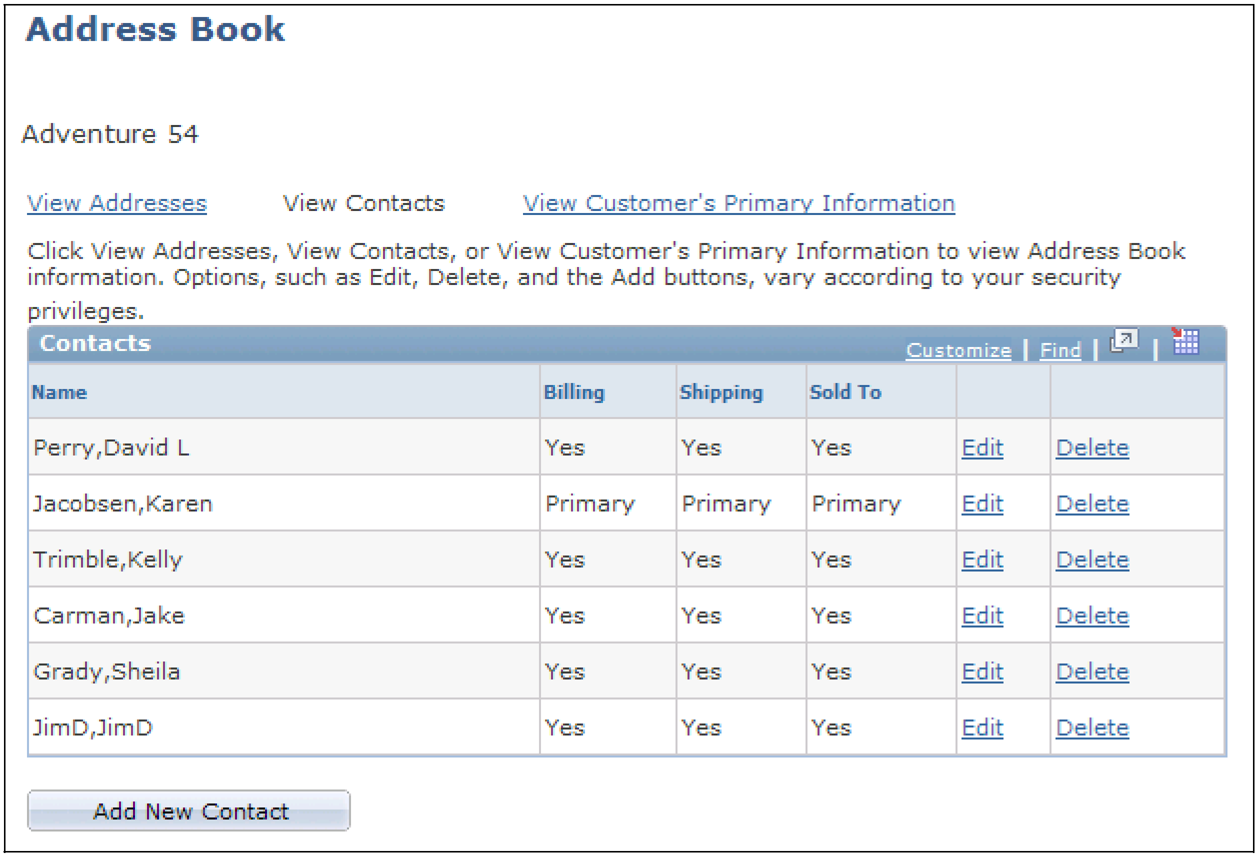
If the address is associated with a contact, you can select whether to delete the address for all contacts who use this address or only for the current contact.

If you delete the address for all contacts but the address is a default bill to, ship to, or sell-to address, the system does not delete the address. Instead, the system removes any associations that contacts have to this address.

## Reviewing Customer Contacts

Access the Address Book: View Contacts page (click the View Contacts link on the Address Book: View Addresses page or the Address Book - Customer's Primary Information page).




Address Book: View Contacts page

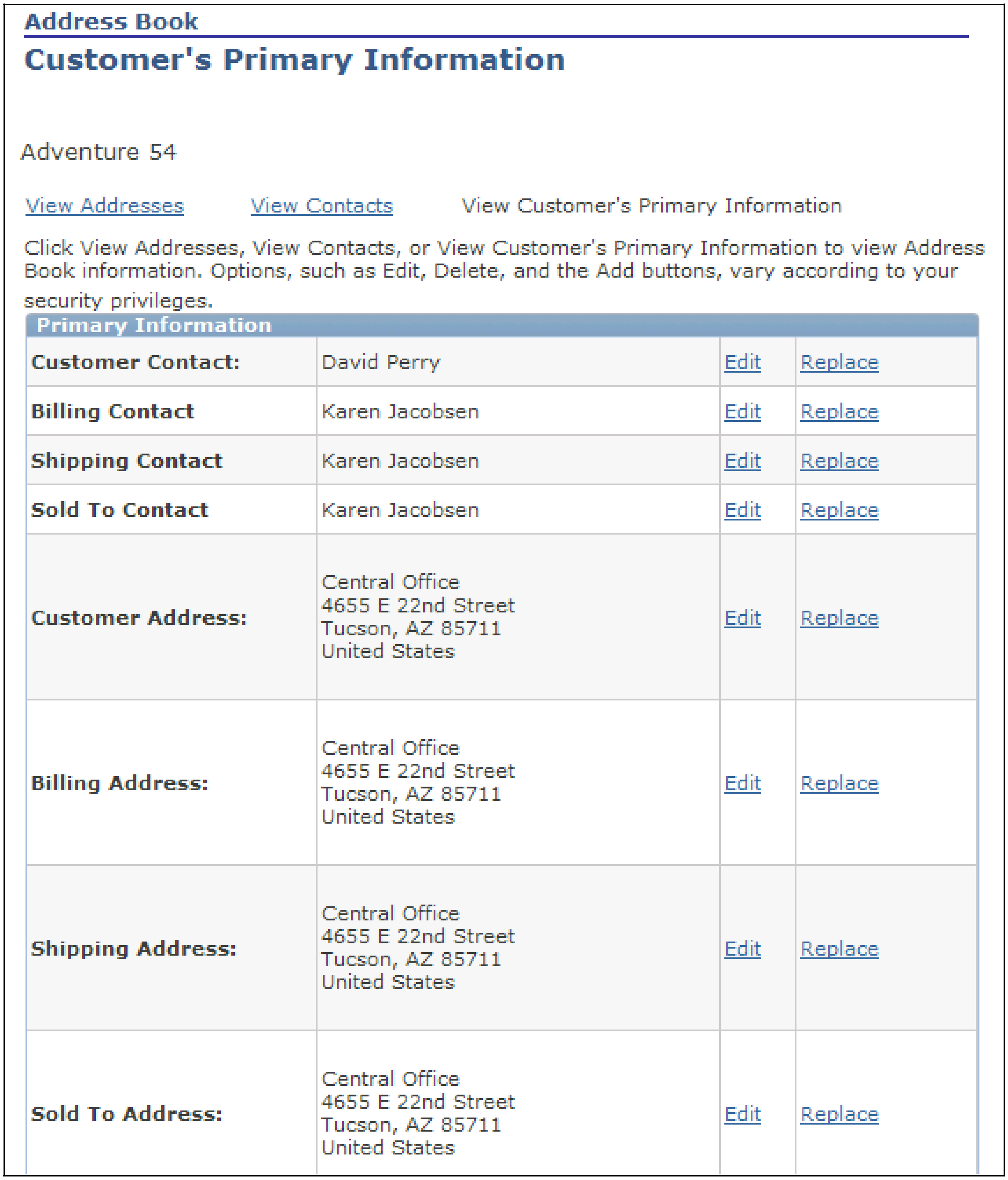
Contacts who are associated with the customer appear on this page.

**Billing, Shipping,** and **Sold To** *Primary* appears in the appropriate column for the primary billing, shipping, and sold-to contacts. *Yes* appears in the appropriate column for additional contacts. To change a customer's primary contacts, access the Address Book - Customer's Primary Information page.

## Reviewing Customer Primary Information

Access the Address Book: Customer's Primary Information page (click the View Customer's Primary Information link on the Address Book: View Addresses or Address Book: View Contacts page).



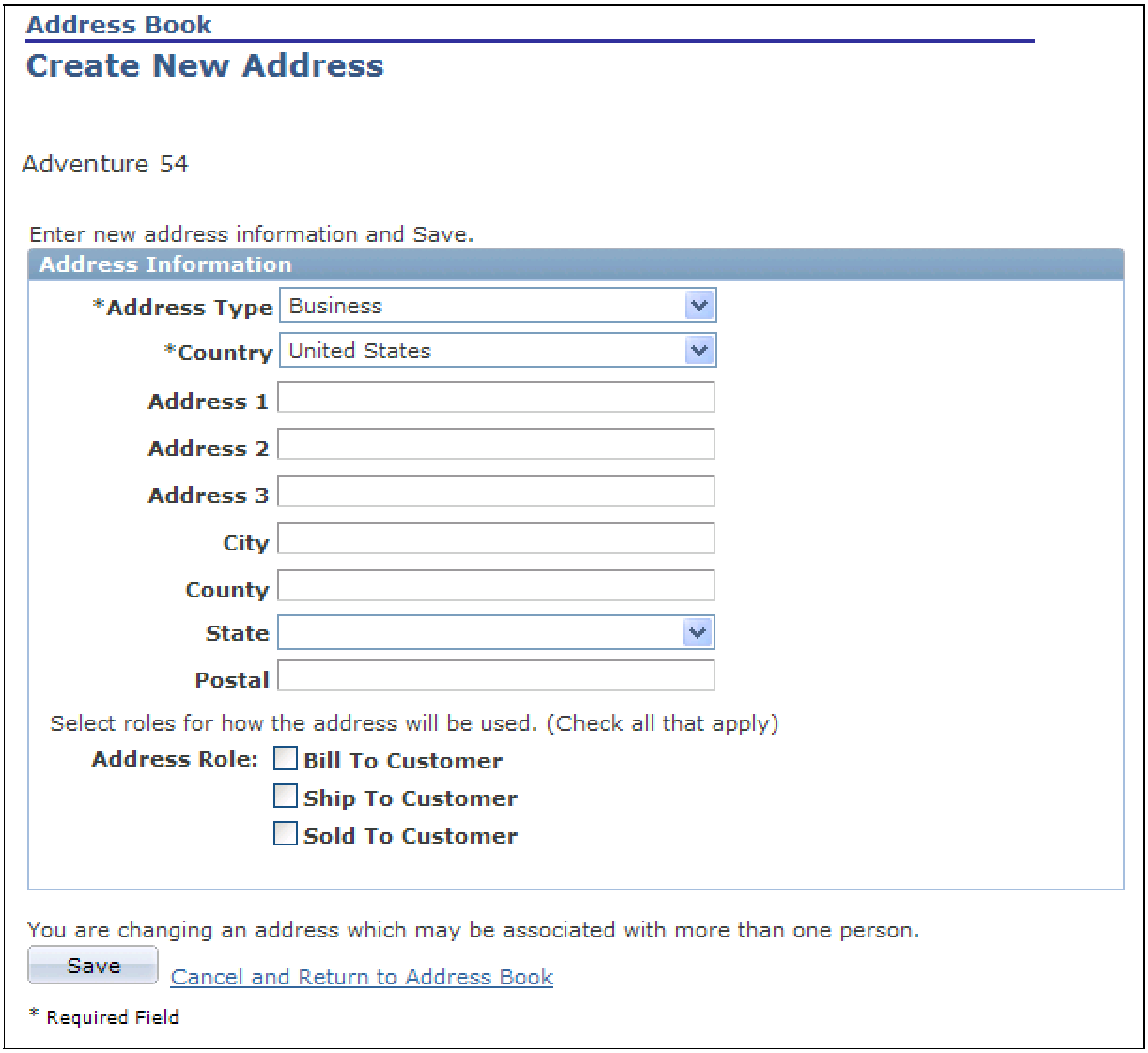

Address Book: Customer's Primary Information page

The customer's overall primary contact and address and primary billing, shipping, and sold-to contacts and addresses appear on this page. You can modify the contacts and addresses or select a new primary contact and address.

## Creating Contact Addresses

Access the Address Book: Create New Address page (click the Add New Address button on the Address Book: View Addresses page).




Address Book: Create New Address page

This page is similar to the Create New Address page.

Enter the new address information. If the address is a billing, shipping, or sold-to address, select the appropriate address role check box.

---

**Note.** The Address Roles appear only for users who are contacts of companies, not for end consumers.

---

## Creating Customer Contacts

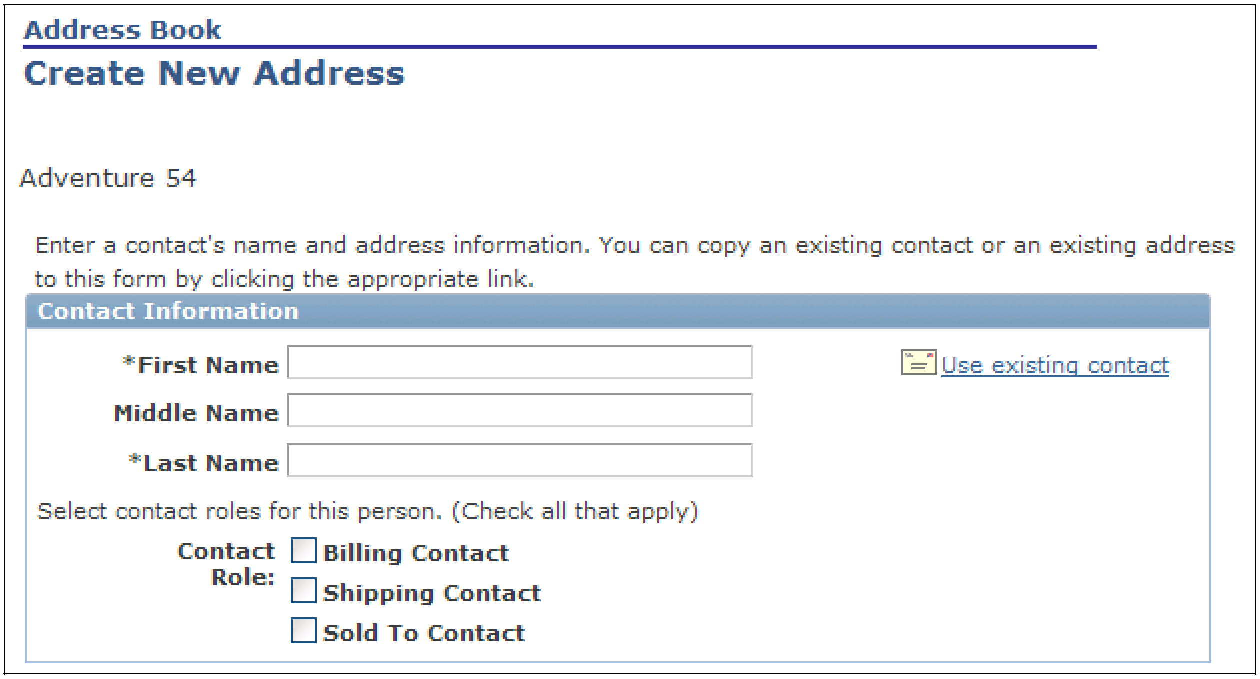
Access the Address Book: Create New Address page (click the Add New Contact button on the Address Book: View Addresses page or the Address Book: View Contacts page).

This page is similar in use to page that is used to create new contact addresses, except that it contains additional lines for you to enter contact information.

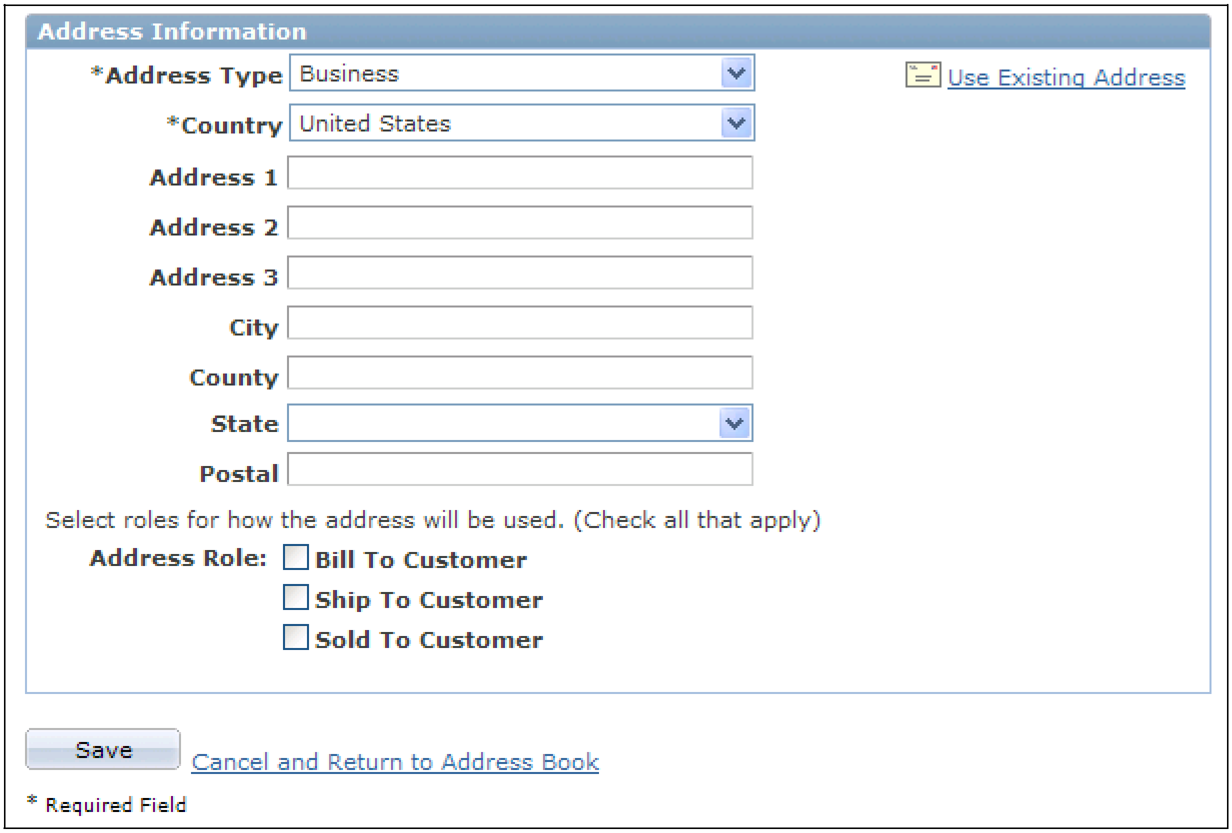
 

### Contact Information

If the new contact is a billing, shipping, or sold-to contact, select the appropriate contact role check box.




Address Book: Create New Address - Contact Information page




Address Book: Create New Address - Address Information page

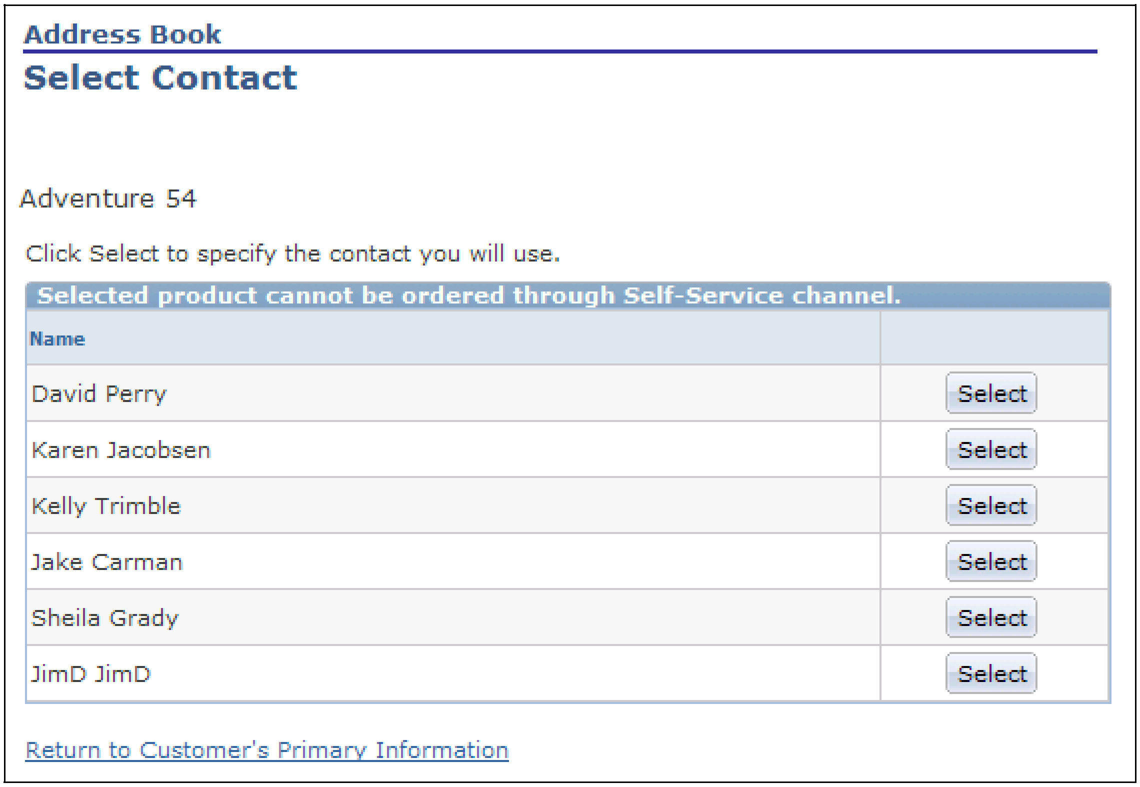
**One use only - not a permanent address or contact**

Select to create a temporary contract and address just for the corresponding transaction.

**Note.** This field appears only if you are adding a shipping address.

## Selecting Existing Contacts

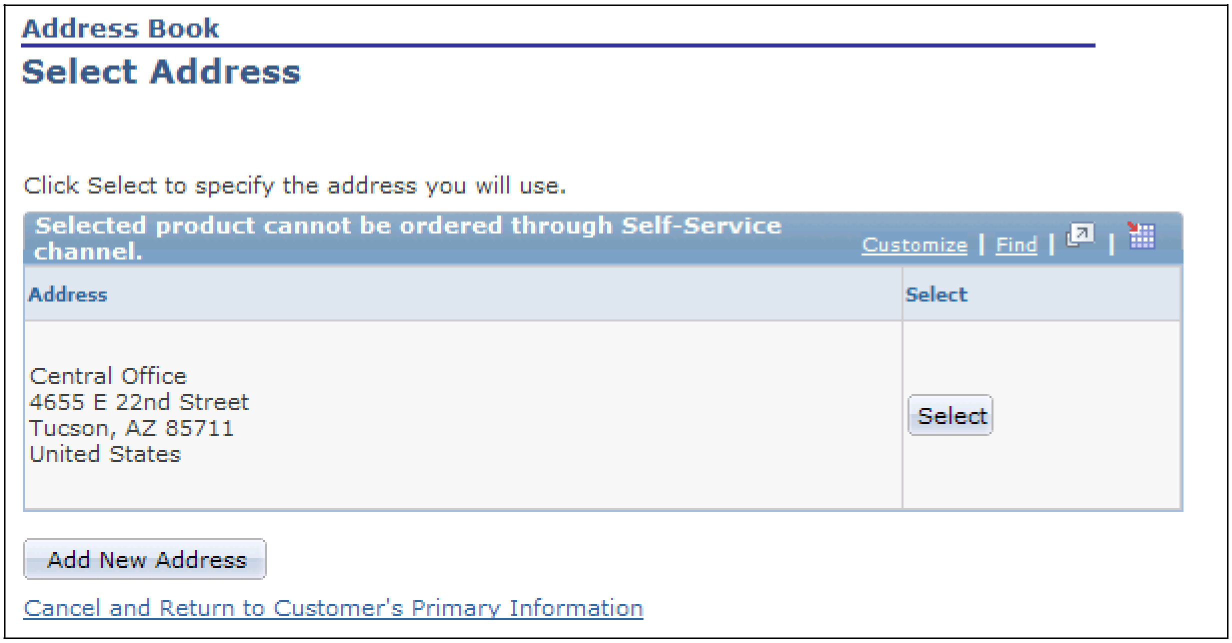
Access the Address Book: Select Contact page (click a Replace link on the Address Book - Customer's Primary Information page).




Address Book: Select Contact page

## Selecting Existing Addresses

Access the Address Book - Select Address page (click a Replace link on the Address Book - Customer's Primary Information page).

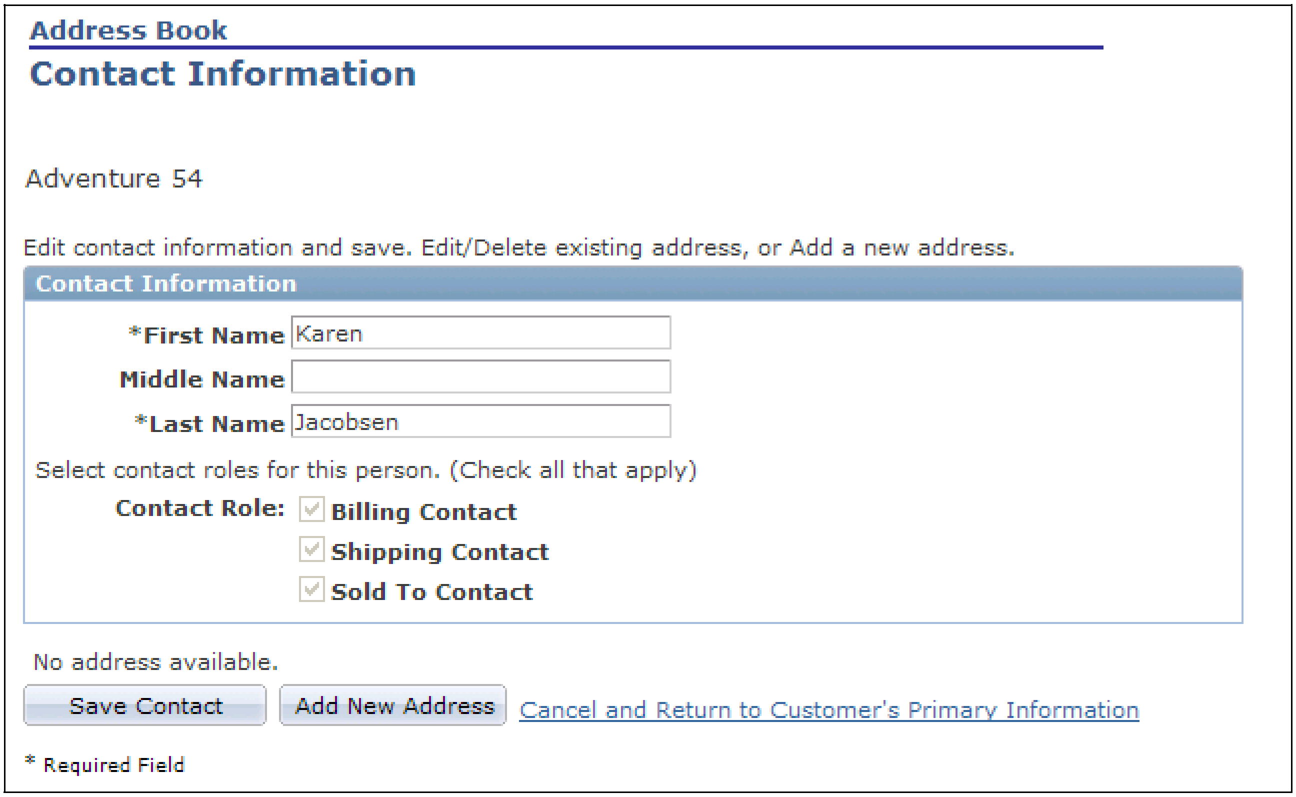



Address Book - Select Address page

## Maintaining Name, Role Information, and Relationship Address for Customer Contacts

Access the Address Book - Contact Information page (click the Edit link on the Address Book - Customer's Primary Information page).




Address Book - Contact Information page

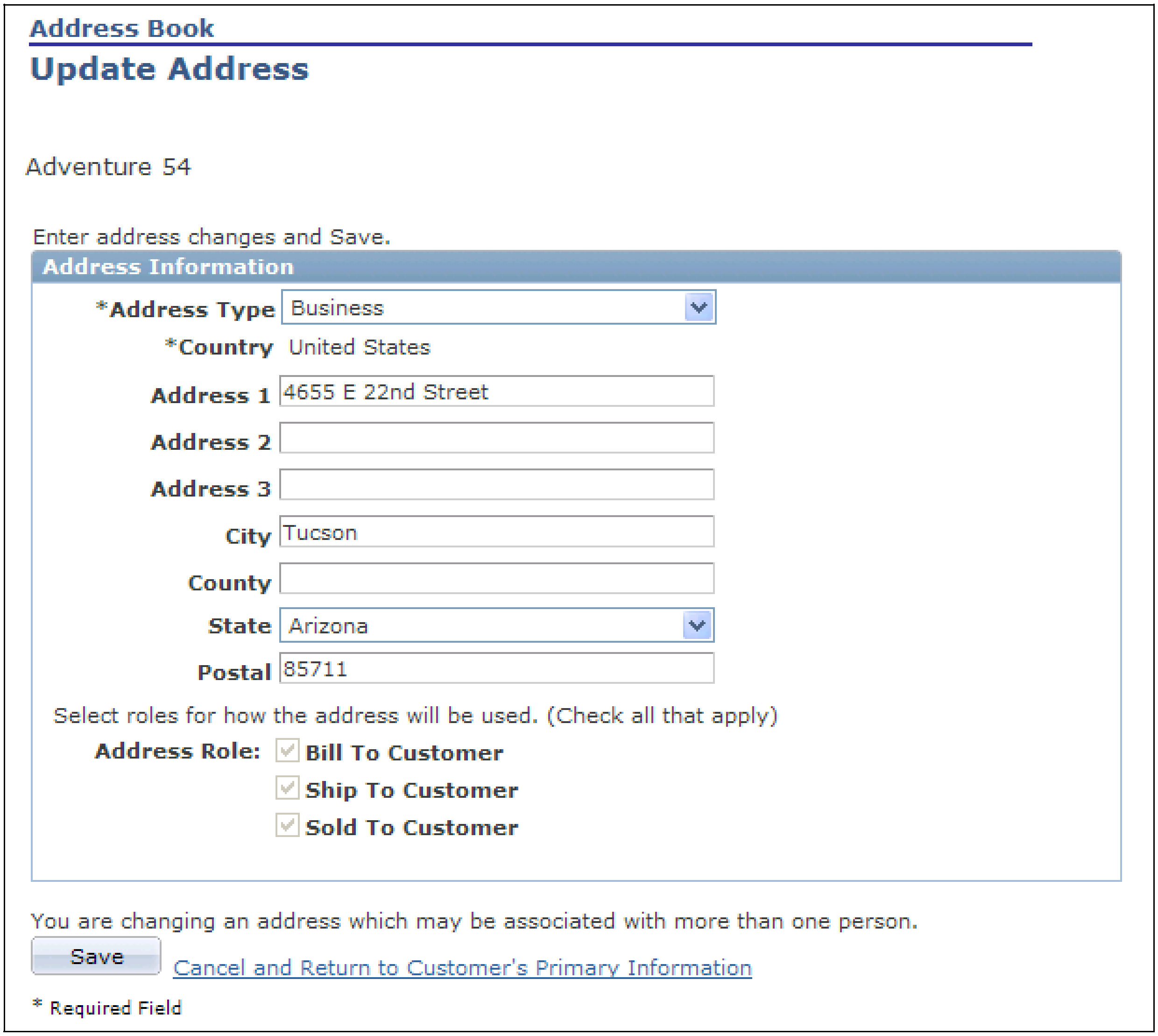
If the contact is a billing, shipping, or sold-to contact, select the appropriate contact role check box.

Click Edit or Delete to maintain the address for the contact-to-customer relationship. Click the Add New Address button to enter a new address for this relationship.

## Updating Customer or Contact Addresses

Access the Address Book - Update Address page (click the Edit link on the Address Book - Customer's Primary Information page).




Address Book - Update Address page

This page is almost identical to the Address Book - Create New Address page. Unless you are a contact of a customer, the *Address Roles* are not visible.

# Maintaining Consumer Contact and Address Information

This section lists the pages that consumers use to maintain their contact and address information.

---

**Note.** These pages are similar in appearance and usage to the pages that are used to maintain address information for contacts. You must be signed in as a customer to view these pages.

---

See  and Chapter 21, "Working with Customer Self-Service Transactions," Maintaining Contact Information, page 382.

## Pages Used to Maintain Consumer Contact and Address Information

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Change Profile Info | RX_NAME_SIGNIN | Manage Profile, Change Profile Info | Review and edit name, password, and privacy preferences. |
| Manage Profile - Default Addresses | RX_PROFILE_DFLTS | Manage Profile, Default Addresses | View and initiate update of the consumer's default contact information, shipping address, and billing address information. |
| Manage Profile - Contact Information | RX_ADR_MY_INFO | Click the Change Contact Information button on the Manage Profile - Default Addresses page. | Change the consumer's address, phone number, and email address information. |
| Address Book - Customer's Primary Information | RX_ADR_CUST_DFLTS | Click the Change Default Shipping or Change Default Billing button on the Profile - Default Addresses page. | Review the consumer's primary address, primary billing address, and primary shipping address. |
| Address Book - Select Address | RX_ADR_SEL_CUST_DF | Click a Replace link on the Address Book - Customer's Primary Information page. | Select a new address of any of the address roles that appear on the Address Book - Customer's Primary Information page. |
| Address Book - Create New Address<br>Address Book - Update Address | RX_ADR_CUST_ADDR | • Click the Edit link or the Add New Address button on the Profile - Contact Information page.<br>• Click the Edit link on the Profile - Customer's Primary Information page. | Create or update addresses. |
| Address Book - Delete Confirmation | RX_ADR_DEL_CONFIRM | Click the Delete link on the Profile - Contact Information page. | Delete selected address. |

# Maintaining Consumer Address Books

This section lists the pages that consumers use to maintain their address books.

---

**Note.** These pages are similar in appearance and usage to the pages that contacts use to maintain their address books. Differences in usage are explained below

---

See and Chapter 21, "Working with Customer Self-Service Transactions," Maintaining Contact Address Books, page 385.

## Pages Used to Maintain Consumer Addresses Books

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Address Book | RX_ADR_CONSUMER | Manage Profile, Address Book | Review addresses that are associated with the consumer. |
| Address Book - Update Address | RX_ADR_CUST_ADDR | Click the Edit link on the Address Book page. | Modify addresses in the address book. |
| Address Book - Create New Address | RX_ADR_NEW_REP | Click the Add New Address button on the Address Book page. | Create addresses in the address book for the consumer. |
| Address Book - new address - Select Address | RX_ADR_SEL_CUST_DF | • Click the Replace link on the Address Book - Customer's Primary Information page.<br>• Click the Use Existing Address link on the Address Book - Create New Address page. | Select addresses to copy into new address book entries. |
| Address Book - Delete Confirmation | RX_ADR_DEL_CONFIRM | Click the Delete link on the Address Book page. | Confirm that you want to delete the address, and select whether to delete it for all users or the current user. |

## Viewing Consumer Addresses

Access the Address Book page (Manage Profile, Address Book).


Address Book page for a consumer

---

**Note.** In addition to the self-service application, this page is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

---

See  and Chapter 21, "Working with Customer Self-Service Transactions," Self-Service Page Visibility, page 372.

If the address is associated with a contact, the contact's name appears in the name columns. If the address is associated only with a consumer, the consumer's name appears in the name columns.

## Deleting Consumer Addresses

Access the Address Book - Delete Confirmation page (click the Delete link on the Address Book page).

When you delete a consumer address that is not associated with a contact, the system displays only the Yes - Delete and No - Do Not Delete buttons on this page.

If the address is associated with a contact, you can select whether to delete the address for all contacts who use this address or only for the current contact.

If you delete the address for all contacts but the address is a default bill to, ship to, or sell-to address, the system does not delete the address. Instead, the system removes any associations that contacts have to this address.

# Viewing Internal Contacts

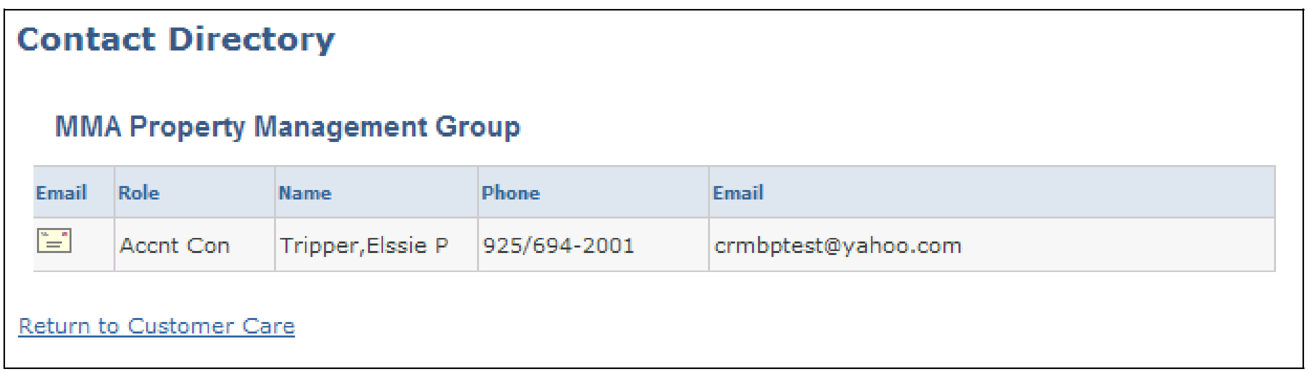
This section discusses how to view internal contacts.

## Page Used to View Internal Contacts

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Contact Directory | WC_CONTACT_DIR | • Customer Care, Internal Contacts, Contact Directory<br>• Service Center, Internal Contacts, Contact Directory (in the employee portal for Higher Education users). | View the names and contact information of people in an organization who are available for customers to contact for assistance. |

## Viewing Internal Contacts

Access the Contact Directory page (Customer Care, Internal Contacts, Contact Directory).




Contact Directory page

 (Email) — Click to open your email application to send an email message to the corresponding contact using the listed email address.

**Return to Customer Care** — Click to return to the parent folder (Customer Care).

For Higher Education users to return to the parent folder (Service Center) of the Contact Directory page, use the PeopleTools navigation path link on the top of the page.

# Sending Contact Us Messages

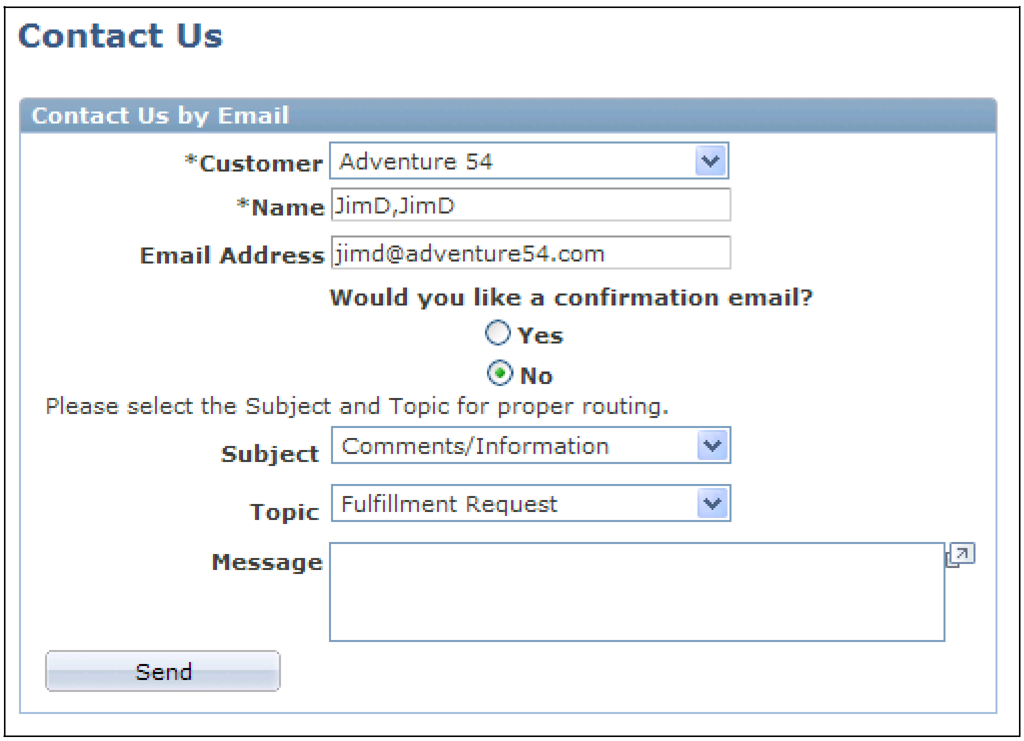
This section discusses how to send Contact Us messages.

## Page Used to Send Contact Us Messages

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
| --- | --- | --- | --- |
| Contact Us | WC_CONTACT_US | Contact Us, Contact Us | Self-service users can send messages to your organization. |

## Sending Contact Us Messages

Access the Contact Us page (Contact Us, Contact Us).




Contact Us page

---

**Note.** In addition to the self-service application, this page is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

---

See  and Chapter 21, "Working with Customer Self-Service Transactions," Self-Service Page Visibility, page 372.

Each subject-topic combination is associated with a workflow action that you specify. The workflow action sends a notification that alerts the recipient to the newly submitted message.

If you use the 360-Degree View feature, the system creates an interaction when the user sends the message. In this situation, the notification normally includes a link to the new interaction.

If the user requests a confirmation email, the system sends a message based on the Contact Confirmation email template. You cannot choose a different template for the confirmation email. You can, however, modify the text of the template.

### Live Chat with Agent

Expand this page region and click the Start Chat button to initiate a two way chat session with a support agent.

This section appears if the page is chat-enabled on the Chat Enabled Page Setup page.

#### See Also

Chapter 20, "Setting Up Customer Self-Service," page 357

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Setting Up PeopleSoft CRM Workflow"

*PeopleSoft Portal Pack 9.1 PeopleBook*, "Working with PeopleSoft CRM Self-Service Pagelets"

# Registering Products

This section discusses how to:

- Register products.
- Enter product registration information.

## Pages Used to Register Products

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Product Registration | RF_PROD_REG_SRCH | Product Registration, Product Registration | Register new or existing products. |
| Product Registration - Product Registration Details | RF_PROD_REG_DET | Click a product link in the Your Existing Products group box or the New Product group box (after locating the product from product catalogs) on the Product Registration page. | Enter product registration information. |

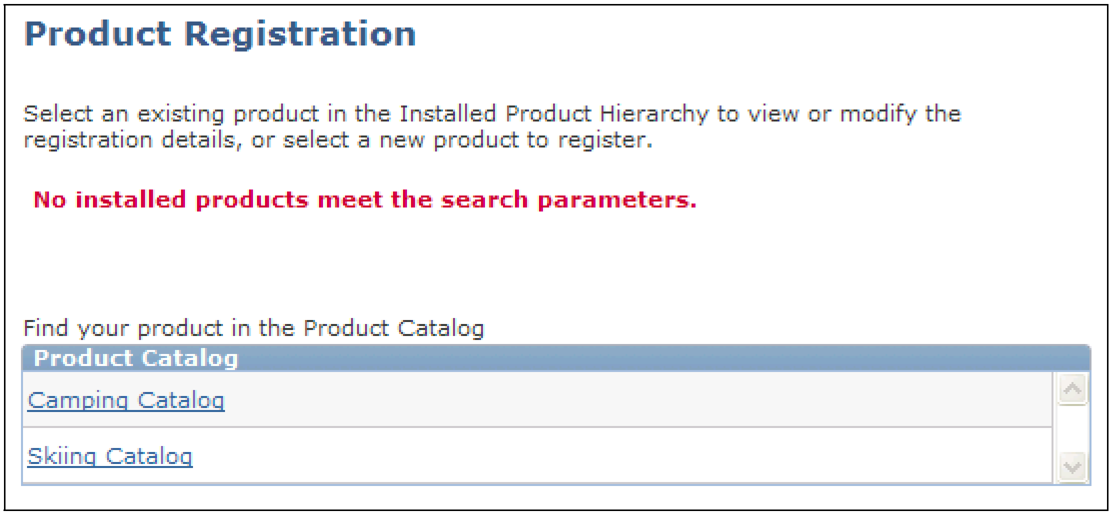
 

### See Also

Chapter 20, "Setting Up Customer Self-Service," Setting Up Product Registration, page 365

## Registering Products

Access the Product Registration page (Product Registration, Product Registration).




Product Registration page

The Product Catalog group box lists the catalogs that you can use for product registration. Depending on how a catalog is set up, you can view a simple list of products, a list of product categories, or both. Regardless of whether you need to browse through different levels to find a product, click a product link to access the Product Registration - Product Registration Details page and submit the product registration.

**Note.** In addition to registering products in PeopleSoft CRM self-service, users can also contact CSRs, who can register products for customers through the 360-Degree View.

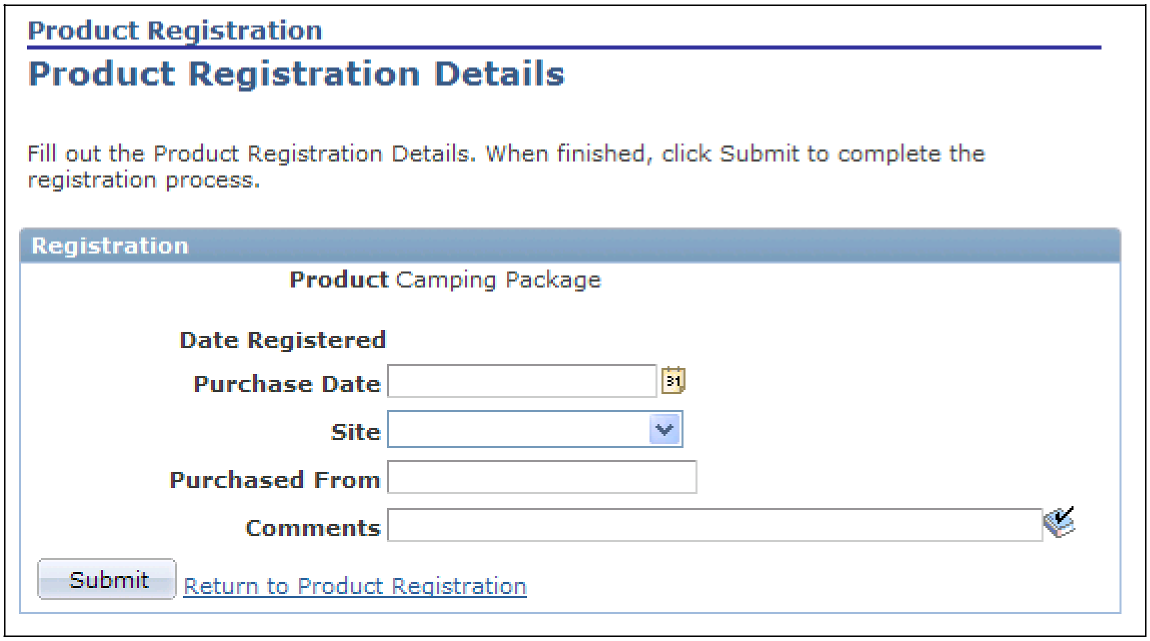
### See Also

Chapter 19, "Using the 360-Degree View," page 339

## Entering Product Registration Information

Access the Product Registration Details page (click a product link in the Your Existing Products group box or the New Product group box (after locating the product from product catalogs) on the Product Registration page).




Product Registration Details page

The Registration group box displays the name of the product that you selected from the catalog, as well as the installed product fields that you selected during setup to appear for product registration purposes.

Administrators can define the fields that appear on this page by using the Product Registration Setup page. Modify these fields for a specific product on the Installed Product page in the Product Definition component. Also, when defining these fields, you can specify whether a user can modify the field value on existing installed products.

In this example, self-service users can enter the serial ID, purchase date, site, location details, and comments for the registration. When the product registration is submitted successfully, the system displays a record of it with the date of registration in the Your Existing Product group box. The system updates the associated installed product with the information that the user entered during product registration. If it is a new product, the system creates an installed product with a status of *Installed.*

| | |
|---|---|
| **Submit** | Click to submit and save the product registration. The system automatically populates the registered date with the current system date when you submit the registration. |
| **Cancel and Return** | Click to return to the Product Registration page. |

Part 6

# Contact Management



## Chapter 22

# Working with Contacts

This chapter provides an overview of contact management in PeopleSoft CRM and discusses how to:

- Manage contacts.
- Maintain contact groups.

## Understanding Contact Management

Contact management enables salespeople (or relationship managers) to manage contacts, tasks, and calendars across all of their accounts by using an easy and intuitive user interface. Relationship managers can:

- Add system contacts to their list.
- Create and manage contact groups.
- Send an email message to selected contacts.
- Create tasks, schedules, and call reports for selected contacts.

This feature focuses on shared contacts. The contacts entered and viewed are enterprise contacts and do not include a user's personal contacts or contacts that are private in any manner. This means that all users can access the contacts and can add the same contacts to their list.

To add private data for a contact that is visible only to you, use the user-defined fields within the Person component.

See  and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Person Business Objects."

Contact management is widely used in industries that support business-to-business (B-to-B), high net worth business-to-consumer, and team selling environments, such as financial services and insurance.

### *Call Reports*

Sales call reports document a contact event such as a meeting, demonstration, or phone call. They are always produced after the event and are follow-up memos documenting the attendees and what took place during the event.

### Contact Management Toolbar

PeopleSoft CRM provides a toolbar that is on every Contact Management page. This toolbar enables you to transfer between Contact Management pages and perform commonly used actions for your contact list. You can also access accounts, tasks, and calendars by using the toolbar.

### See Also

*PeopleSoft Sales 9.1 PeopleBook*, "Managing Sales Leads and Opportunities"

Chapter 23, "Working with Tasks," page 423

Chapter 16, "Using Calendars," page 257

# Managing Contacts

This section discusses how to:

- Access contacts.
- Enter additional filtering criteria.
- Modify columns that appear on the contacts list.
- Personalize the search filter.
- Add existing contacts to the contacts list.
- Add contacts to the system.

## Pages Used to Manage Contacts

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| My Contacts | RD_CONTACTS | My Contacts | Access contacts to perform various actions for the contacts. |

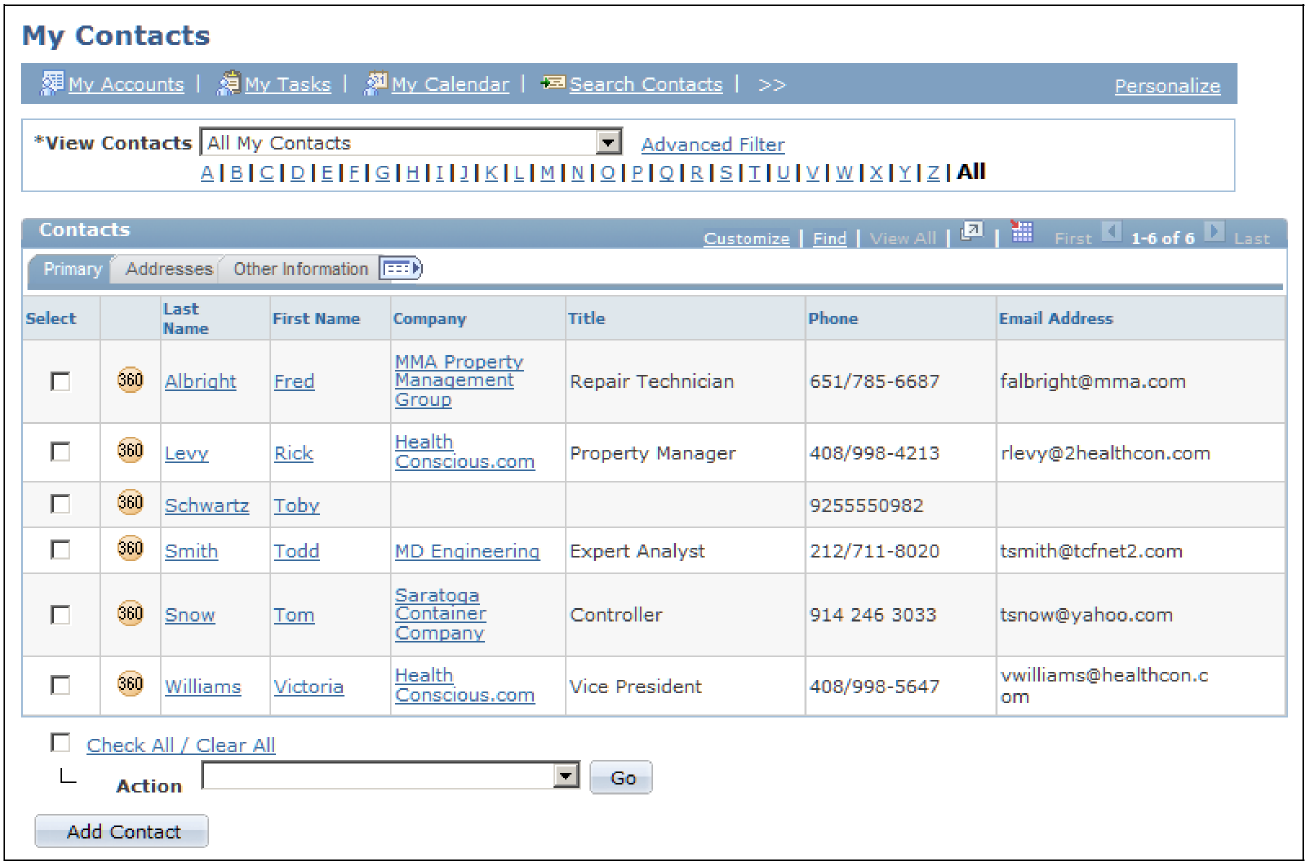
 

| Page Name | Definition Name | Navigation | Usage |
| --- | --- | --- | --- |
| Notification | RD_EMAIL_CNTCT | • Click the Email Contact(s) toolbar button on the My Contacts page.<br>• Select *Email Contact(s)* in the Action field on the My Contacts page. | Send an email notification to selected recipients and members of selected contact groups on the Outbound Notification page.<br>See  and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Sending Manual Notifications," Sending Manual Notifications From CRM Transactions. |
| My Contacts - Search Contacts | RD_IMPORT_CONTACTS | Click the Search Contacts button on the My Contacts toolbar. | Search for contacts that are already defined in the system and select one or more to add to the My Contacts list. |
| Remove Contacts | RD_REMOVE_CNTCT | Select one or more listed contacts.<br>• Click the Remove Contacts button on the My Contacts toolbar.<br>• Select *Remove Contact(s)* from the Action drop down list and click the Go button. | Remove one or more contacts from the My Contacts and all contact groups to which the contact belongs. |
| Person | RD_PRSN_PRIMARY | Click the Add Contact button on the My Contacts page. | Add a contact to the system. |

## Accessing Contacts

Access the My Contacts page (My Contacts).




My Contacts page

Use the letters that appear below the View Contacts field as an index to select the starting letter of the contact names to view. You can modify the way the index appears: for example, you might define the index letters as *A-C*, *D-F*, and so forth.

See  and Chapter 3, "Setting Up General Options," Defining Alpha Indexes, page 44.

**View Contacts**

Select a contact group to view.

**Advanced Filter**

Click this link to enter additional criteria by which you can filter the contact list.

**Select**

Select one or more contacts for which to perform a specified action.

**Check All / Clear All**

Select to select all listed contacts or to clear all selected contacts.

**Note.** This option selects or clears only the contacts on the page that currently appears.

| | |
|---|---|
| **Action** | Select the action to perform for the selected contacts.<br>For example, if you select *Email Contact(s),* then the system displays an email page that is pre-addressed to all of the selected contacts.<br>Actions are:<br>• *Add Call Report for Contact(s)*<br>• *Add Contact(s) to Group*<br>• *Add Task for Contact(s)*<br>• *Email Contact(s)*<br>• *Remove Contact(s)* |

### *Security Considerations*

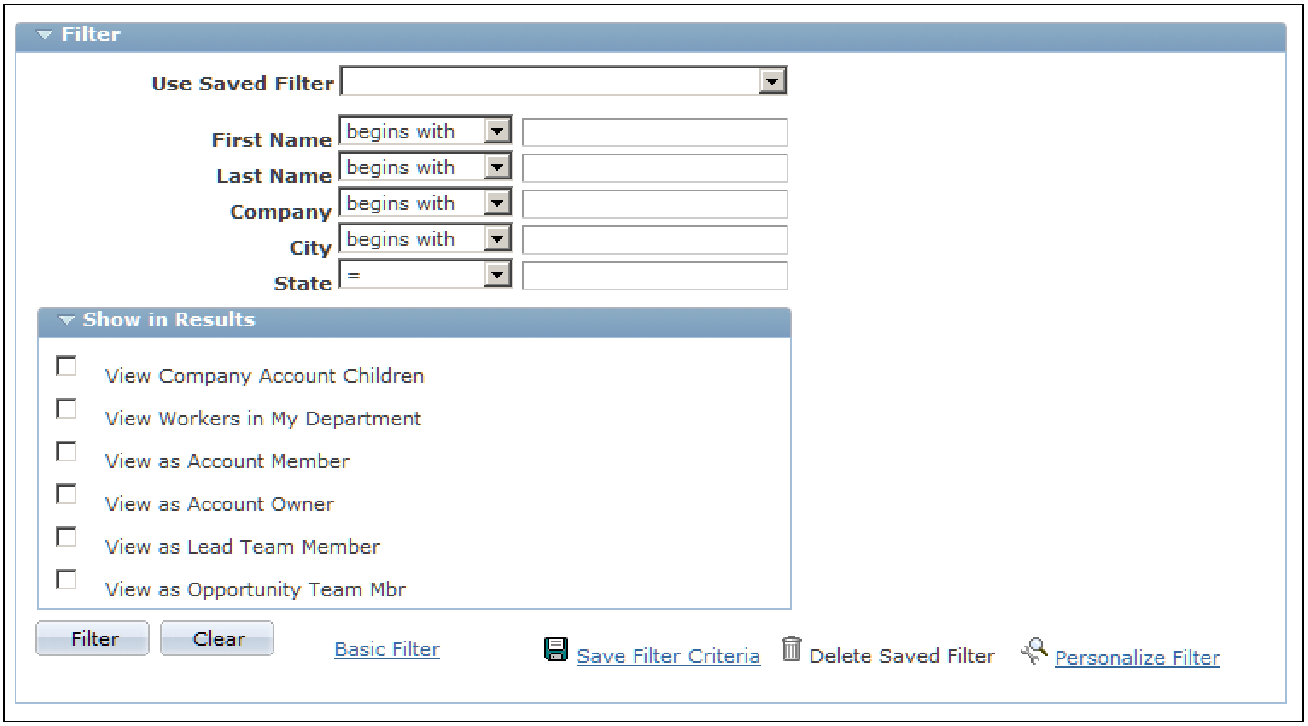
The system provides safeguards against users viewing contact information for which they are not authorized:

- For users that do not have access to all companies that are defined in the system, the company column is blank.
- For users that do not have access to worker information, the worker home phone and worker home address columns are blank, even if they are visible to other users.

## Entering Additional Filtering Criteria

Access the Advanced Filter section of the page (click on the Advanced Filter link on the My Contacts page).




My Contacts: Search page - Advanced Filter section)

Enter one or more search criteria to filter the results by the criteria entered.

---

**Note.** Unless the signed-on user has access to all companies, they aren't able to search for a contact based on the company criteria.

---

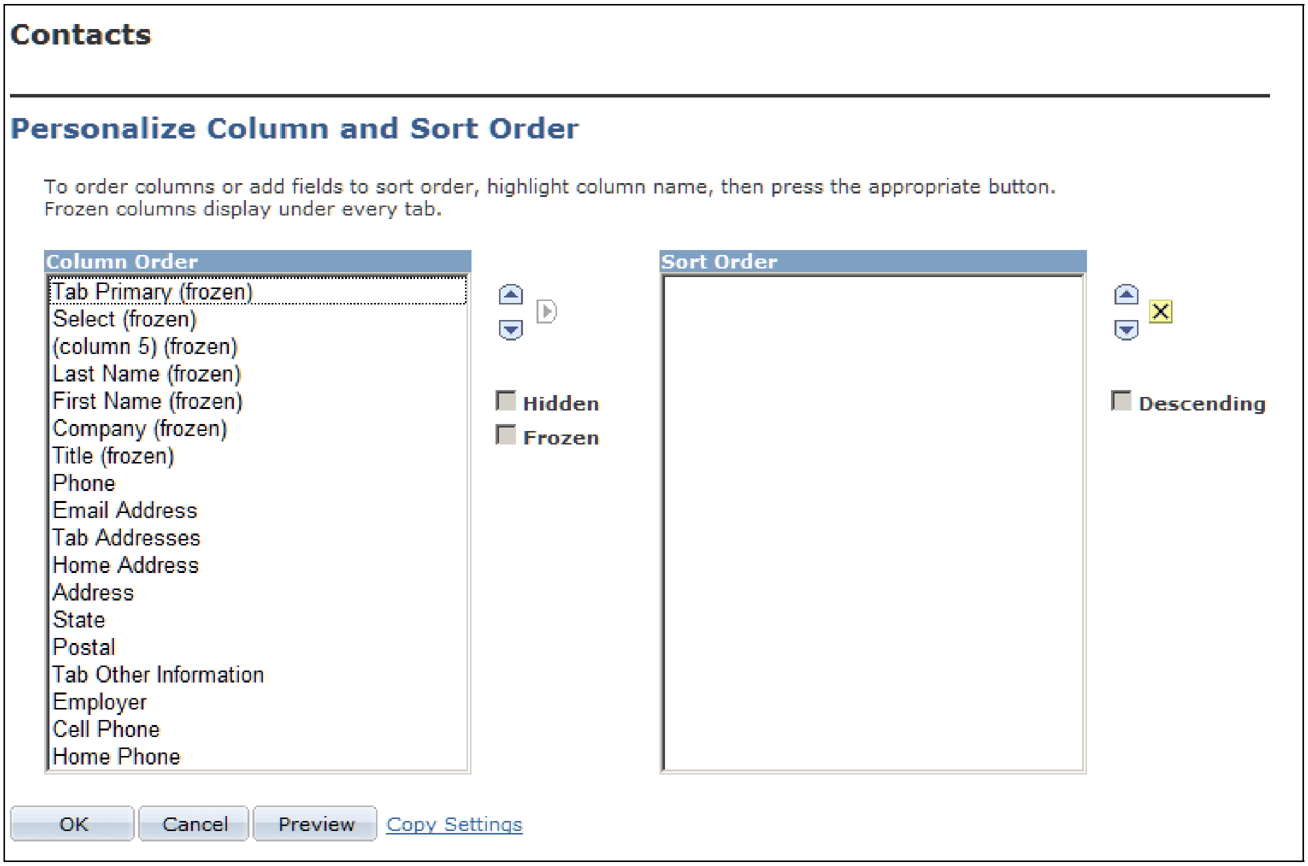
**Show in Results**

Select one or more roles to display only contacts for which you have the selected role(s). For example, select *View as Account Owner* to show only the contacts for customers where you are the account owner.

## Modifying Columns that Appear on the Contacts List

Access the Personalize Column and Sort Order page (click the Customize link at the top of the Contacts section on the My Contacts page).




Personalize Column and Sort Order page

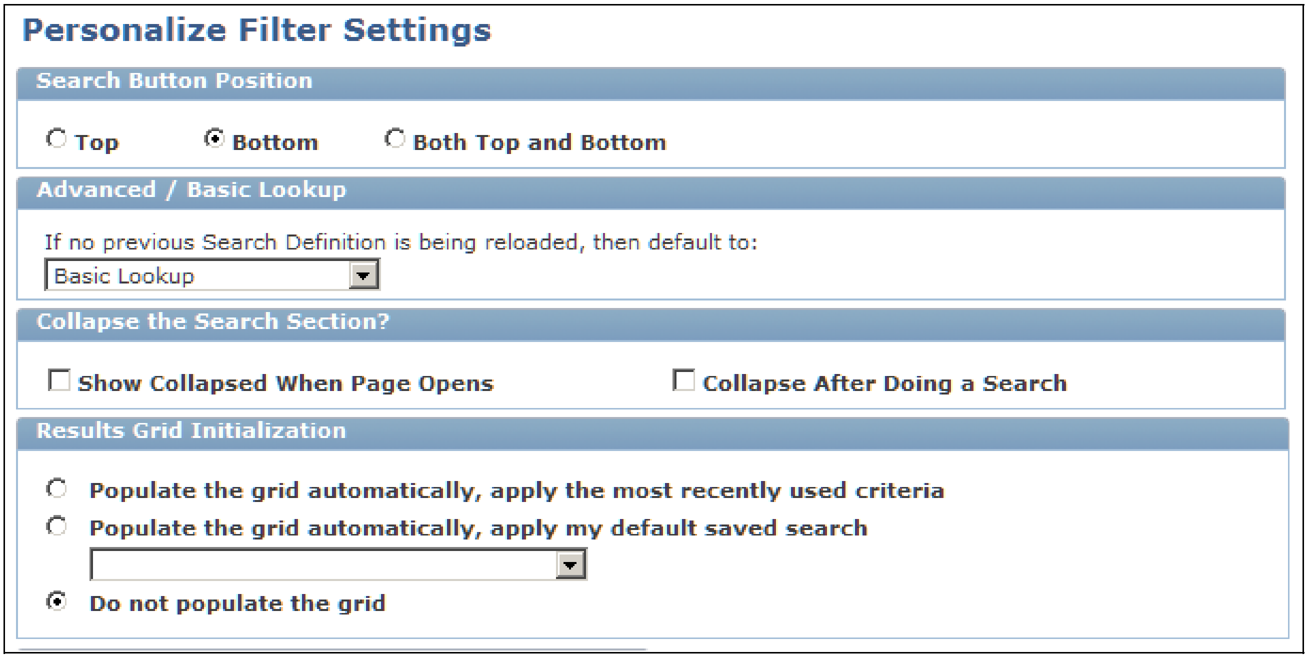
The columns that appear on the My Contacts list are shown in the Column Order list box. You can select a column and rearrange its order, hide it, or use it as a sort column.

Some predefined columns *(Home Address*, *Address*, *State*, *Postal*, *Employer*, *Cell Phone*, and *Home Phone)* are not included in the column order and sort order that appear on this page. To set up the contact list so that you can view those columns, click the Personalize Filter link on the Advanced Filter page.

## Personalizing the Search Filter

Access the Personalize Filter Settings page (click the Personalize Filter link on the My Contacts page).




Personalize Filter Settings page (1 of 2)

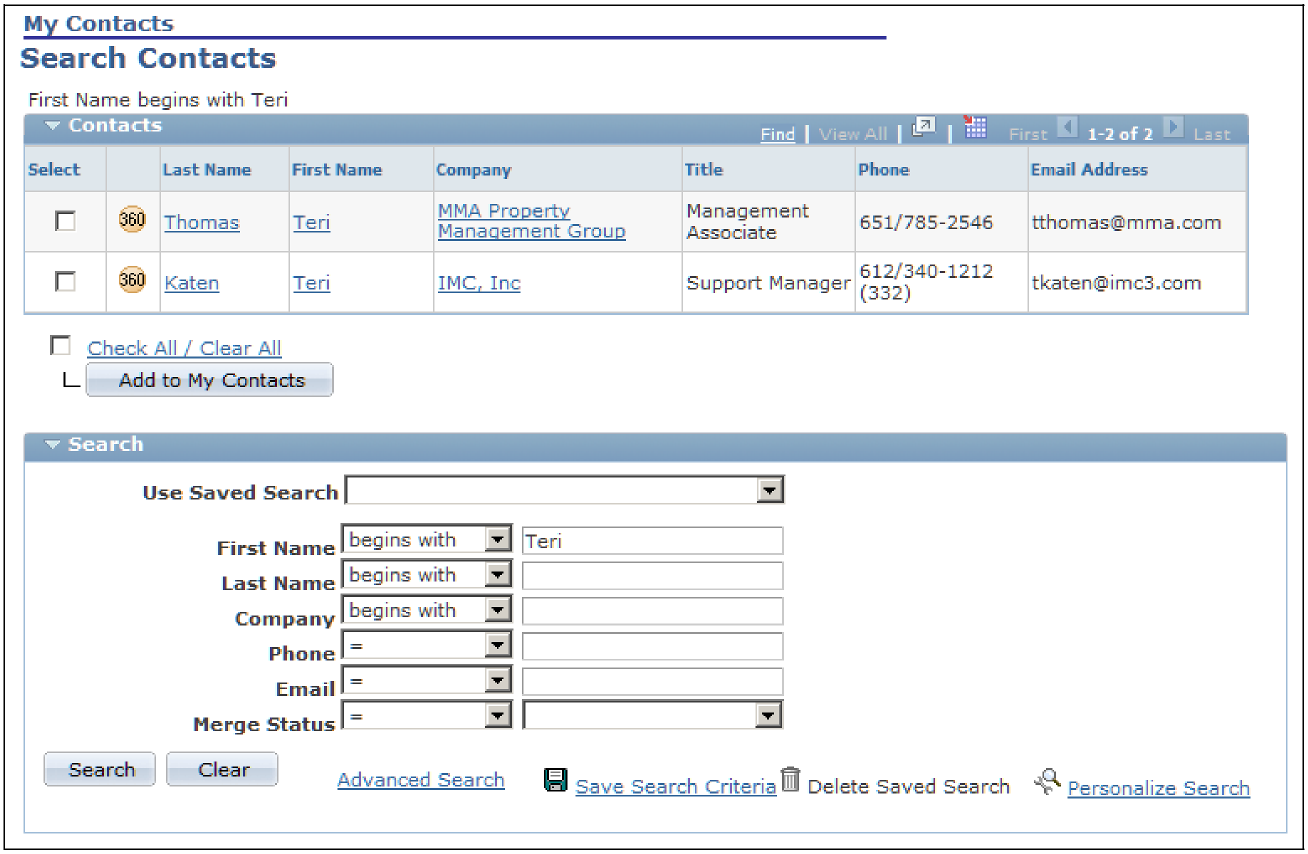

Personalize Filter Settings page (2 of 2)

The Personalize Filter link is available in the Filter section that appears when you click the Advanced Filter link on the My Contacts page.

## Adding Existing Contacts to the Contacts List

Access the My Contacts - Search Contacts page (click the Search Contacts button on the My Contacts toolbar).




Search Contacts page

This page initially appears with only the search fields visible. The results of the search appear in the contacts list. You can select one or more contacts to add to the My Contacts list.

You can also add contacts to the contact list from the contact list from these components:

- 360 Degree View
- Person
- Company
- Site

To automatically insert contacts to the contact list, specify *Yes* in the Auto Insert to My Contacts field that is available on the Sales page of the User Preferences component.

If this flag is set to *Yes* for a user, a user can click the Add to My Contacts toolbar button on the Company, Site, Person, Lead, or Opportunity components to add contacts on that component to the user's My Contacts list.

Contacts of a customer (company or consumer) are added to the customer account owner's and team members' contact lists. Contacts of a company's child companies can be added to the account owner's contact list. Contacts of leads and opportunities can also be added to the contact lists for the lead or opportunity team members.

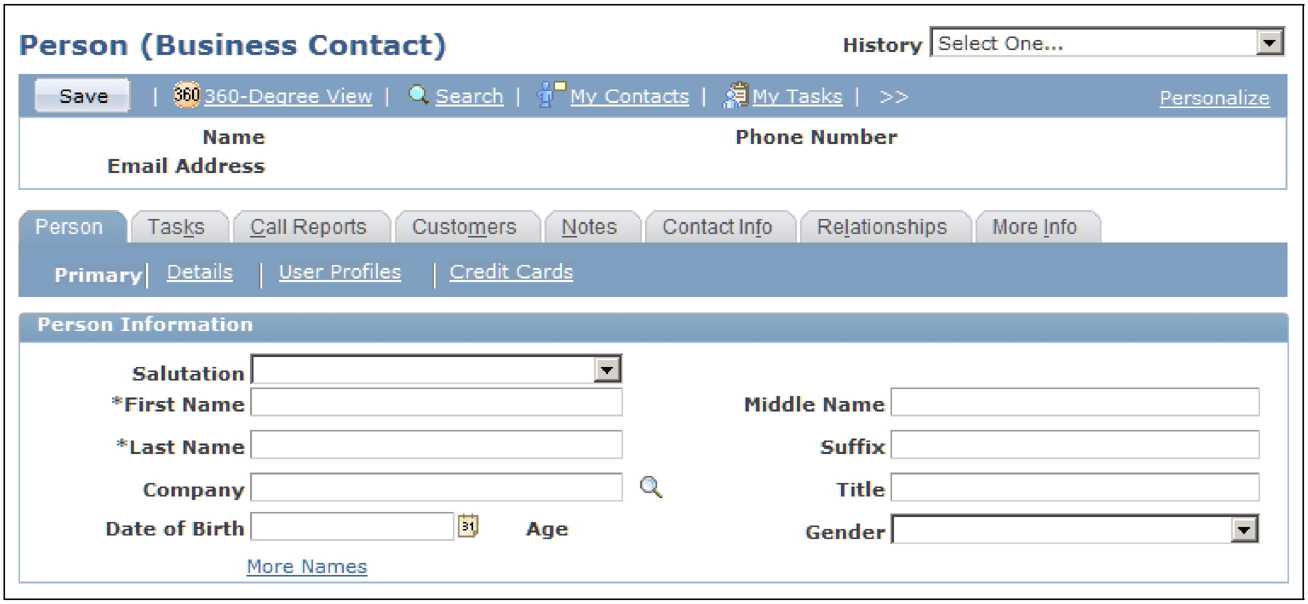
 

### See Also

Chapter 4, "Setting Up Security and User Preferences," Defining Sales Preferences, page 96

## Adding Contacts to the System

Access the Person page (click the Add Contact button on the My Contacts page).




Person page

When you access the Person page from the contact management toolbar, any contact that you add to the system is automatically added to your contact list.

### See Also

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Person Business Objects"

# Maintaining Contact Groups

This section discusses how to:

- Manage contact groups.
- Add or remove contacts of a contact group.
- Maintain groups and group membership.

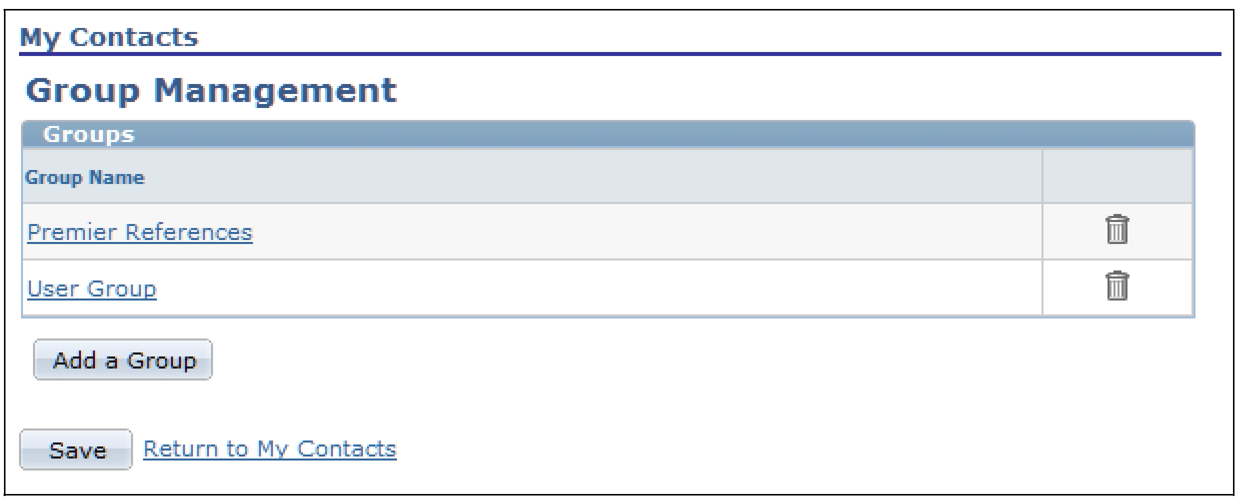
 

## Pages Used to Maintain Contact Groups

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
| --- | --- | --- | --- |
| Group Management | RD_GROUP_MGT | My Contacts<br>Click the Group Management toolbar button. | Manage contact groups. |
| Group Selections | RD_CNTCT_GRP | My Contacts<br>Select *Add Contacts to Group* in the Action field. | Add or remove contacts of a contact group. |
| Group Information | RD_GROUP_MGT | • Click the name of an existing group on the Group Management page.<br>• Click the Add Group button on the Group Management page. | Maintain groups and group membership. |

## Managing Contact Groups

Access the Group Management page (click the Group Management toolbar button on the My Contacts page).



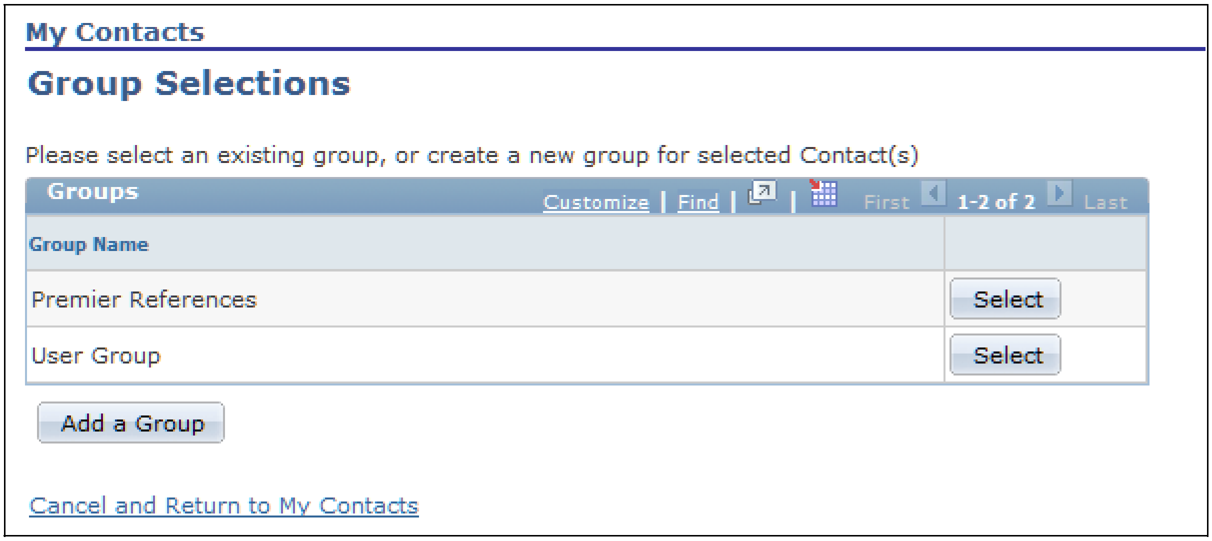

Group Management page

**Group Name** Click a listed group to open the Group Information page for the group.

**Add a Group** Click this button to access the My Contacts - Group Information page and add group details and members to the group.

## Adding or Removing Contacts of a Contact Group

Access the Group Selections page (select Add Contacts to Group in the Action field on the My Contacts page).



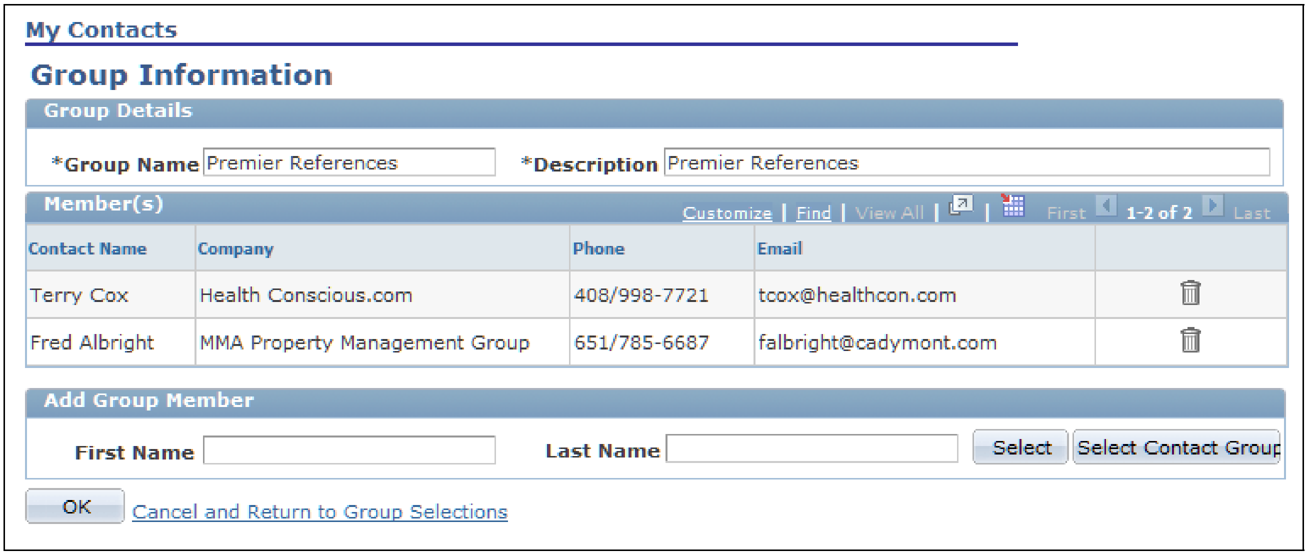

Group Selections page

| | |
|---|---|
| **Select** | Click this button to access the Group Information page where you can add or remove contacts of the group. |

## Maintaining Groups and Group Membership

Access the Group Information page (click the name of an existing group on the Group Management page).




Group Information page

To add a member to the current group, enter first and last names of the contact and click the Select button. If more than one matching contact is returned, the system takes you to the Search for Contact page where a list of contacts with names beginning with the characters you entered are displayed. Select one or more contacts and click the Select button to add them to the current contact group.

---

**Note.** If CDH integration is enabled, the duplicate prevention logic is triggered when you click the Select button. If it finds duplicate entries that resemble the contact you are about to add, you can either select an existing match from the list that returns, or choose to create a new person record in CDM using Quick Create.

---

## Chapter 23

# Working with Tasks

This chapter provides an overview of task management in PeopleSoft CRM and discusses how to:

- Set up task management.
- Create tasks.
- Manage tasks.
- View calendars.
- Manage meetings.

### *See Also*

Chapter 22, "Working with Contacts," page 409

## Understanding Task Management

Task management enables users to plan and manage the day-to-day activities that are associated with managing sales, service, and support activities.

Tasks are associated with workflow items that are triggered by PeopleSoft CRM transactions, such as leads and opportunities. If a transaction triggers a workflow item that assigns a task to a user, than that task appears in the user's task list and the user's calendar. If the task is for a meeting, the task appears in the user's meeting list. You access task lists, calendars, and meeting lists using the My Tasks and My Calendar pages.

Users can access their task list directly from the left-hand menu or by clicking a toolbar button that is available on the My Contacts and My Calendar pages. Additionally, users can view tasks that are associated with a transaction or component.

You can create tasks from these components.

- Lead
- Opportunity
- Strategic account management
- Risk Component in Wealth Management
- Change Management

- Case
- Service Order

Details of a task that appear on the My Tasks, My Calendar, or My Meetings page are available by clicking the task name.

### Task Types

PeopleSoft CRM provides these task types when the application is first installed:

- All Day Event
- Appointment
- Change Activity
- Change Approval
- Change Meeting
- Holiday
- Follow-up
- Meeting
- Phone call
- Reminder
- Service Order
- Summary
- To-do

You can also set up additional task types.

See  and Chapter 23, "Working with Tasks," Setting Up Task Management, page 427.

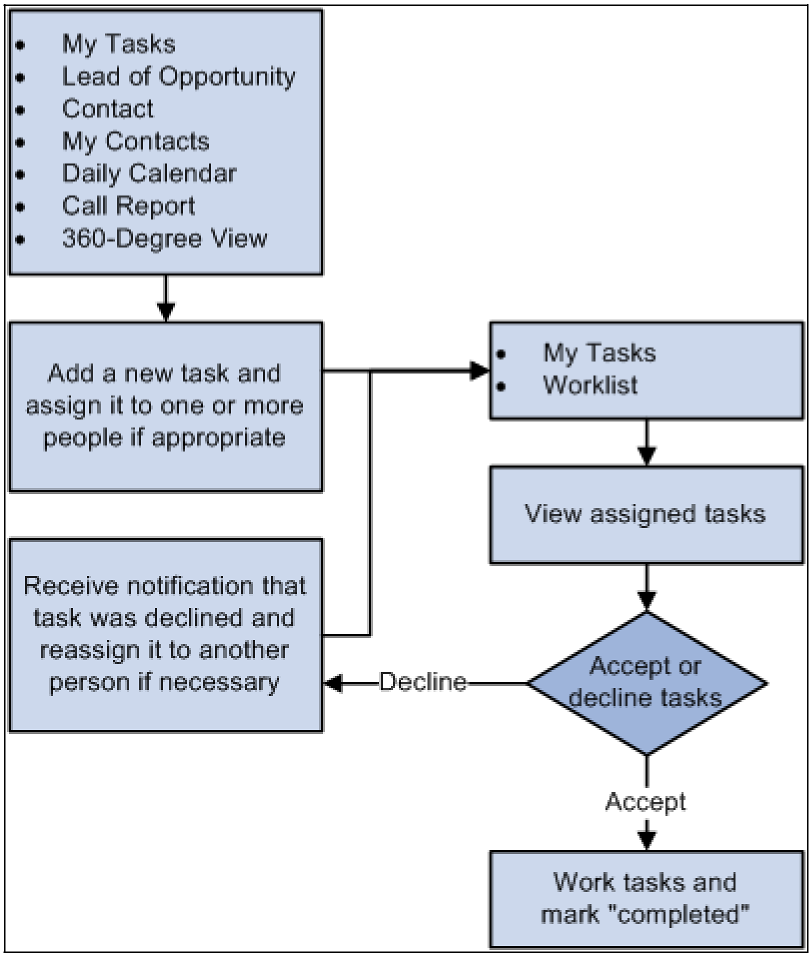
### Task Management Process

A task owner creates a task and assigns it to one or more persons. A notification is then sent to each of the assignees that a task is assigned to them, and the task appears in the assignee's task list. The assignee can either accept or decline the task. The owner is notified when the assignee marks the task as completed.

The task owner can reassign a task for any of the assignees. An assignee can reassign a task that is assigned to them. When a task is reassigned, the system sends a notification to the new assignee that the task is assigned to them. When the new assignee accepts or declines the task, the system notifies the owner.

This diagram shows the task management process:




Task Management Process Flow

You can also call the Task web service to perform many task management inquiries and notifications.

See  and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Business Processes and Web Services."

### *Personal Information Managers*

You can synchronize tasks between the PeopleSoft CRM database and personal information management (PIM) systems such as Microsoft Outlook and Lotus Notes.

See your current Infosync Server documentation for more information.

### *Task Folders*

Users can organize their tasks using folders. Five standard folders are available; users can additionally create their own personal folders. Personal folders are used only for entries from a user's individual set of tasks, not for tasks from a group or from a user's direct reports. Clicking a folder name displays the contents of that folder. A yellow highlight indicates the currently selected folder.

These are the standard folders:

- The *My Tasks* contains all tasks owned by or assigned to the user that have not been moved to another personal folder
- The *All My Tasks* folder is a combination of *My Tasks* and other user-defined (personal) folders. It contains the tasks that appear under *My Tasks* and all user-defined folders.

  It does not include items from the Group Tasks, Direct Reports, or My Sales Team folders.
- The *Group Tasks* folder contains tasks that are owned by a provider group without an individual owner. Only entries from the provider groups to which the user belongs are shown.

  This folder appears only if the user belongs to at least one provider group.
- The *Direct Reports* folder contains the tasks owned by, assigned to or delegated to direct reports. By default, the tasks of all the direct reports along with their delegated tasks will show up under this folder

  This folder appears only if the user has direct reports. The Direct Reports folder will not, however, show the user's personal tasks.

  When viewing the Direct Reports folder, users have access to a drop-down list box for selecting a specific employee and filtering the task entries accordingly.
- The *My Sales Team* folder contains the tasks owned by, assigned to or delegated to members of your sales team.

  This folder appears only if the user is the leader of a sales team (as defined by the Territory Tree).

  When viewing the My Sales Team folder, users have access to a drop-down list box for selecting a specific employee and filtering the task entries accordingly.
- The *Delegated* folder contains any tasks that have been delegated to that user. Delegation of a user's tasks is defined on the Task Options page.

Users can create, rename, and delete personal folders at will. However, if a user attempts to delete a folder that is not empty, an error message tells the user to move the folder contents elsewhere (to another personal folder or to the inbox) first.

---

**Note.** The My Tasks, All My Tasks, Group Tasks, Direct Reports, My Sales Team, and Delegated folders cannot be deleted or renamed

---

The toolbar on the My Tasks page includes a button that a user clicks to display the number of items in each folder. The folder count appears in parentheses next to the folder name. The system, however, does not provide folder counts for the Group Tasks, My Sales Team, Direct Report, or Delegated folders. For performance reasons, the folder counts are *not* updated continuously.

By default, the system hides folder counts when the page first appears. After they are displayed, however, they remain visible as long as the user remains on the page. To hide folder counts, users must navigate to the My Tasks page again.

---

**Important!** Folder counts are only as current as the most recent time that the user clicked either the Folder Counts toolbar button or the Refresh toolbar button.

---

### See Also

*PeopleSoft Sales 9.1 PeopleBook*, "Managing Sales Leads and Opportunities"

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Company Business Objects"

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Person Business Objects"

Chapter 4, "Setting Up Security and User Preferences," Setting System-Wide Security Options, page 69

Chapter 19, "Using the 360-Degree View," page 339

# Setting Up Task Management

To set up task management, use the Task Priority (RB_TSK_PRIORITY) and Task Type (RB_TSK_TYPE) components.

This section lists the pages used to set up task management and discusses how to:

- Define task types.
- Define task priorities.
- Define task group templates.
- Define task durations.
- Reset sync IDs.

**Note.** Your PeopleSoft Application Administrators can control and modify access to all PeopleSoft CRM pages, including those that are used for Task Management, through the standard PeopleTools security using roles, permission lists, and user IDs. Documentation for this security administration is provided in *PeopleTools 8.52: Security Administration PeopleBook.*

## Pages Used to Set Up Task Management

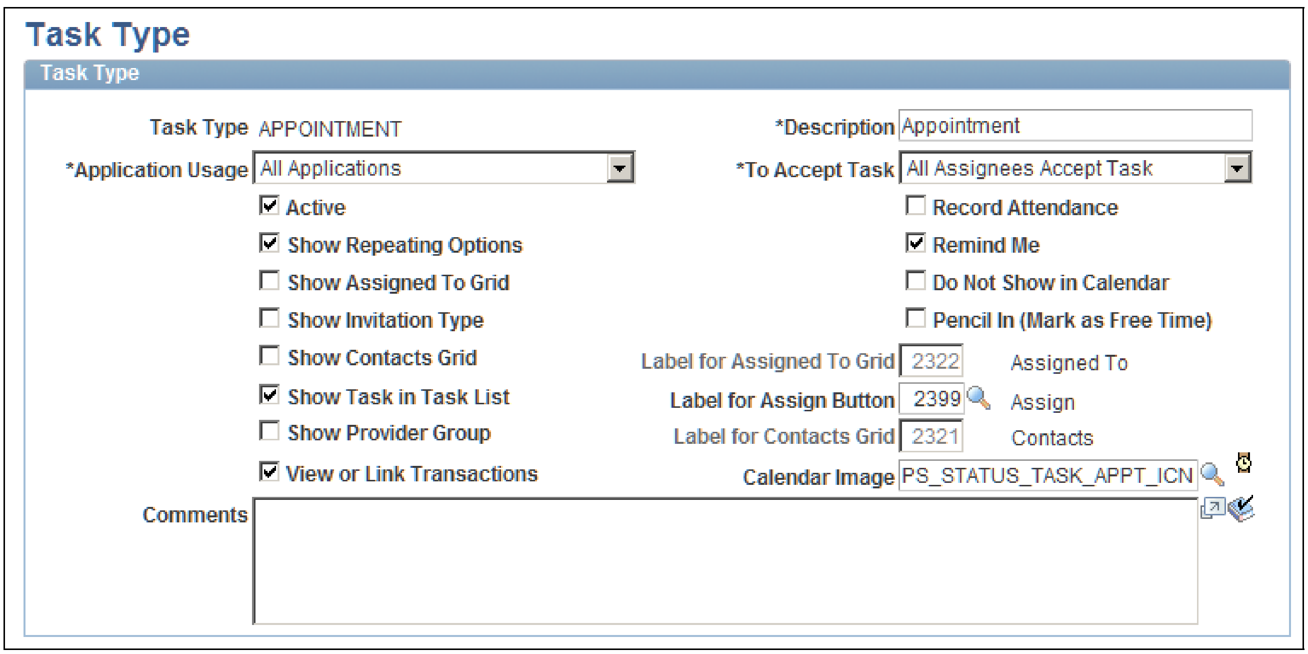
| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Task Type | RB_TSK_TYPE | Set Up CRM, Common Definitions, Task Management, Task Type, Task Type | Define task type codes that enable the user to categorize tasks. |
| Task Priority | RB_TSK_PRIORITY | Set Up CRM, Common Definitions, Task Management, Task Priority, Task Priority | Define task priority codes that enable the user to designate a priority for tasks. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Task Group Template | RB_TSK_GRP_TPL | Set Up CRM, Common Definitions, Task Management, Task Group Template, Task Group Template | Define task group templates and task durations. |
| Clone Template | RB_CLONE_TXN_SEC | Click the Clone button on the Task Group Template page. | Specify a new template name to be created from the current template. |
| Reset SYNCIDs | RB_TSK_SR | Set Up CRM, Common Definitions, Task Management, Reset SYNCIDs | Reset invalid sync IDs between tasks and their corresponding CRM transactions. |

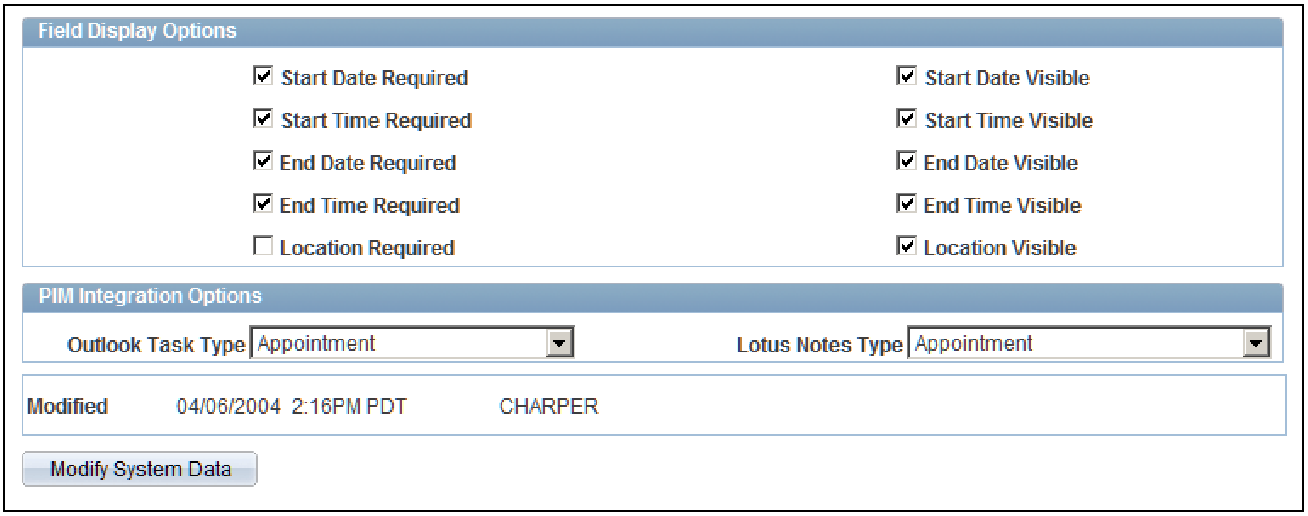
## Defining Task Types

Access the Task Type page (Set Up CRM, Common Definitions, Task Management, Task Type, Task Type).




Task Type page (1 of 2)




Task Type page (2 of 2)

### *Task Type*

The options you select on this page control the options that are available on the Task Detail page.

**Task Type**

Enter the type of the task.

**Application Usage**

Select the application where the task type is used. A value of *All Applications* indicates a universal type that is available to all applications.

**Active**

Select to make the task type active. Users can only create tasks for active task types.

**To Accept Task**

Select to indicate whether all of the assignees need to work on the task or only one assignee needs to work on the task when the task is assigned to multiple people.

**Pencil In (Mark as free Time)**

Select to indicate that the task duration is not treated as busy time by the Assignment Engine.

**Record Attendance**

Select to enable recording of attendance.

If this is selected, the Task Details page shows a column of check boxes in the Invitee/Assignee grid for users to indicate whether the Invitee/Assignee attended the meeting. This check box is usually selected for meeting task types.

**Show Repeating Options**

Select to enable the user to select the frequency and time period in which this task repeats.

| | |
|---|---|
| **Do not show in Calendar** | Select to suppress the task from the user's calendar.<br>This option is cleared by default.<br>**Note.** The task appears in the user's calendar only if this option is cleared *and* the user enters a start and end date and time for the task. |
| **Show Assigned to Grid** and **Label for Assigned to Grid** | Select to have the assigned to grid appear on the Task Detail page.<br>If you select Show Assigned to Grid, then the Label for Assigned to Grid field becomes enterable for you to change the grid label that appears on the Task Details page. By default, the system displays *Assigned To.* This value comes from the message catalog. |
| **Show Invitation Type** | Select to have the Invitation Type column appear in the Invitees grid on the Task Detail page. |
| **Show Contacts Grid** and **Label for Contacts Grid** | Select to have the contacts grid appear on the Task Detail page.<br>If you select Show Contacts Grid, then the Label for Contacts Grid field becomes enterable for you to change the grid label that appears on the Task Details page. By default, the system displays *Contacts.* This value comes from the message catalog. |
| **Label for Assign Button** | Select a value to change the label for the Assign Button that appears on the Task Details page. By default, the system displays *Assign.* This value comes from the message catalog. |
| **Show Task in Task List** | Select to have the task appear in the task list for the task owner and all assigned users.<br>**Note.** Do not select this option for the Task Type of *Service Order,* since Service Order activities should be viewed and updated directly from the Service Order component, not from the Task List. |
| **Show Provider Group** | Select to have the Provider Group field appear in the Task Details page. |
| **View or Link Transactions** | Select to have the View or Link Related Objects link appear on the Task Detail page when the user adds a task of this type.<br>**Note.** Do not select this option for the Task Type of *Service Order,* since the link has not been designed to work on the Task Detail page for that Task Type. |
| **Calendar Image** | Enter the name of the image that identifies the task type in the task list and calendar. |

See *PeopleTools 8.52: System and Server Administration PeopleBook,* "Using PeopleTools Utilities"

### *Field Display Options*

**Start Date Required, End Date Required, Start Time Required, End Time Required,** and **Location Required**

Select the fields that are required for this task type.

**Start Date Visible, End Date Visible, Start Time Visible, End Time Visible,** and **Location Visible**

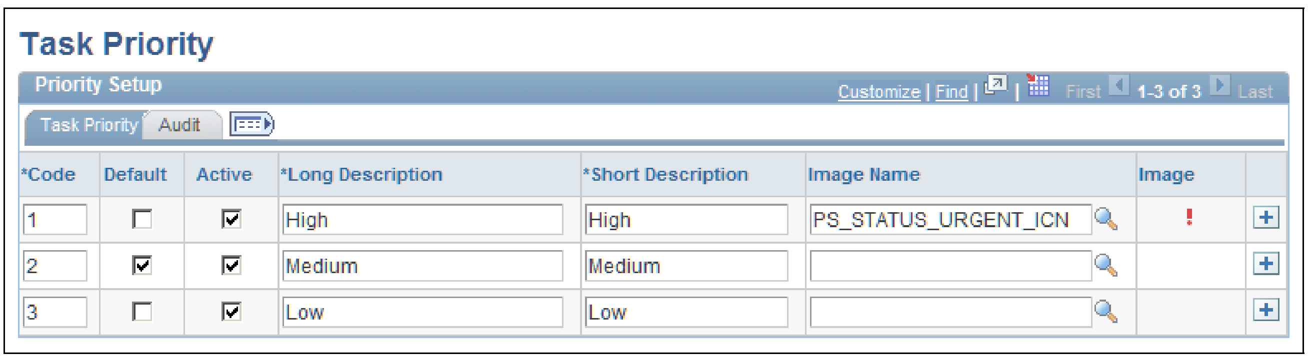
Select the fields that are visible for this task type. If you indicate that a field is required, you must also indicate that it is visible. However, a field can be visible but not required.

### *PIM Integration Options*

This section is not used by the CRM system.

## Defining Task Priorities

Access the Task Priority page (Set Up CRM, Common Definitions, Task Management, Task Priority, Task Priority).




Task Priority page

**Code**

Enter a code to identify the task priority.

**Default**

Select one priority as the default for all tasks.

**Active**

Select to indicate that this task priority is active. Only active priorities are available to assign to tasks.

**Image Name**

Select the image that represents the priority visually. If defined for a task priority, the image appears on the My Tasks list for each task that has that priority.

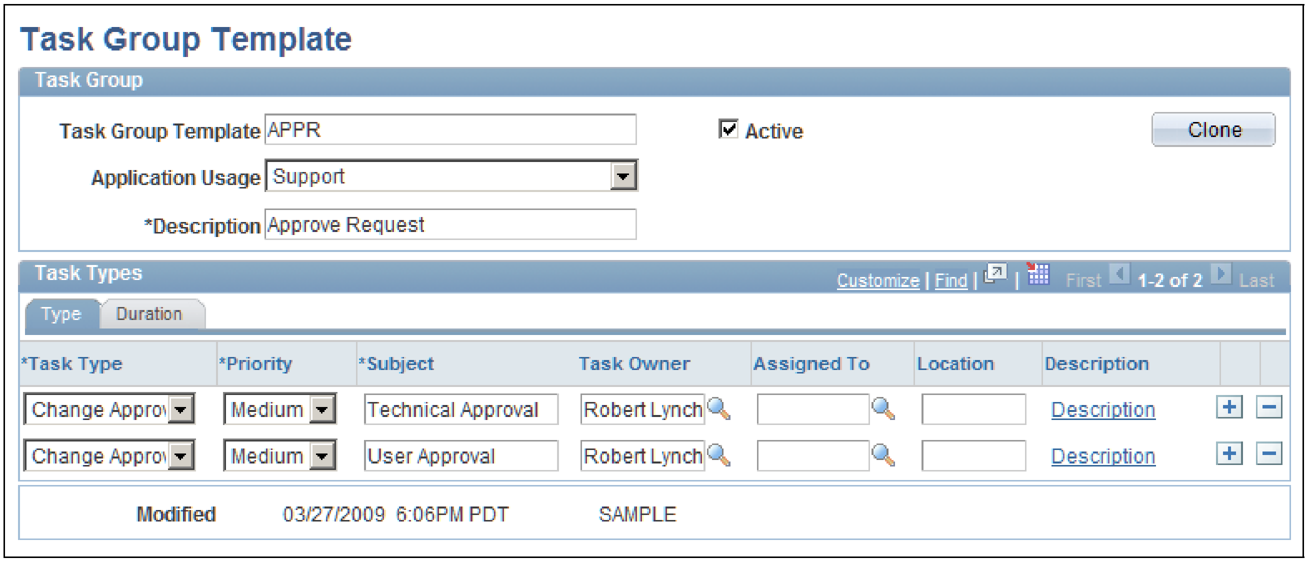
 

### *See Also*

Chapter 23, "Working with Tasks," Creating Tasks or Updating Task Details, page 444

## Defining Task Group Templates

Access the Task Group Template - Type page (Set Up CRM, Common Definitions, Task Management, Task Group Template, Task Group Template).




Task Group Template - Type page

Task group templates ensure that all tasks that must be completed to accomplish the goal that is assigned. For example, the task group Install Hardware might consist of three tasks: Installation, Test Install, and Installation Acceptance. This is particularly useful when the tasks are performed by different people with different reporting relationships.

When a user schedules a task group, the task group template creates and assigns each task within the group.

### *Task Group*

| | |
|---|---|
| **Active** | Select to activate the group template. |

**Application Usage**

Select the application or component for which the group template can be used. Values are:

- *All Applications*
- *Change Management*
- *Field Service*
- *HR Helpdesk*
- *HelpDesk*
- *Higher Education*
- *Lead*
- *Marketing Events*
- *Opportunity*
- *Personal Information Mgmt* (personal information management)
- *Sales*
- *Strategic Planning*
- *Support*

---

**Note.** If you select *Change Management, HelpDesk, HR HelpDesk, Strategic Planning* or *Support* the system displays the Duration tab. You can use this page to enter offset days, duration days, and start and end times. For *Change Management,* you enter only days, hours and start use codes.

---

### *Task Group Template - Type*

Use this section to add tasks to the group template. For each task, specify default values that pertain to the selected usage: task type, priority, task name (subject), provider group, task owner, assignee, location, and task description (for *Change Management, HR Helpdesk, HelpDesk* and *Support).* These values appear as default when the corresponding group template is selected at runtime and are can be updated.

Note that the Provider Group column will only be visible and editable on a row if the corresponding Task Type definition has been configured to show this field.

---

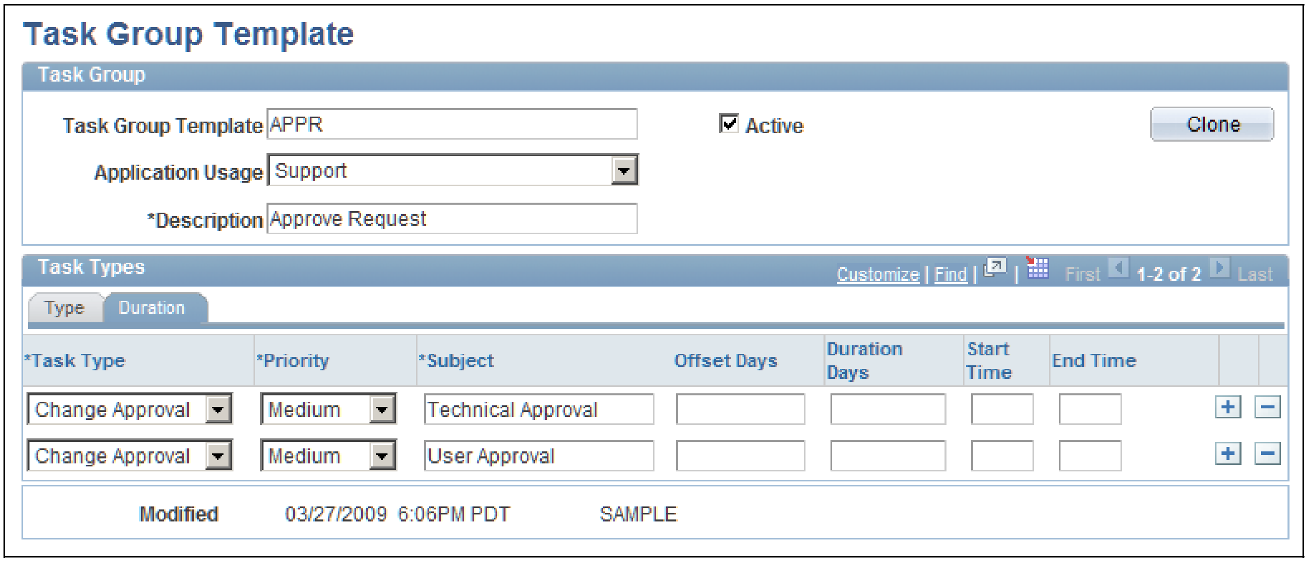
**Note.** If the default task owner and assignee are not specified in the task group template, at runtime, the logged on user becomes the default task owner and no assignees are pre-populated. The owner can update task information, add and delete task entries as necessary.

---

## Defining Task Durations

Access the Task Group Template - Duration page (Set Up CRM, Common Definitions, Task Management, Task Group Template, Task Group Template).




Task Group Template - Duration page

Use this page to specify a duration for each task. If the task type requires a start or end time (for example, meetings), you must enter these fields. The specific fields that appear on this page are dependent on the task type. This tab appears only when you select *Change Management*, *HelpDesk*, *Strategic Planning* or *Support* from the Application Usage field.

---

**Note.** For Strategic Planning, the system validates the required fields. For example, Start Time and End Time are required for meetings. The system, however, doesn't validate fields for other application usages.

---

**Offset Days**

This field appears only if you selected *HelpDesk*, *Strategic Planning* or *Support* in the Application Usage field.

Enter the number of days that are added to the plan start date to derive the task start date. The task end date is derived from adding the Duration Days to the task start date.

**Duration Days, Start Time** and **End Time**

Enter the number of days a task should take as well as the start and end times for each task.

**Start Use Code**

This field appears only if you selected *Change Management* in the Application Usage field.

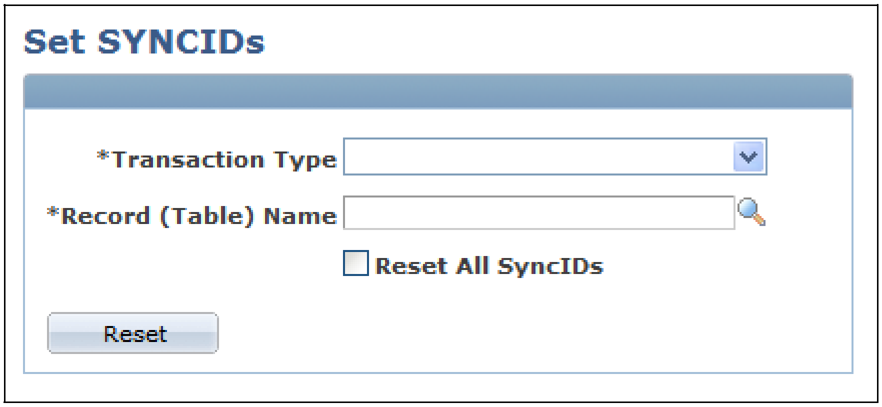
Select one of these values to indicate when a task should start:

- *Current Phase Start*
- *Next in Sequence*
- *Prior Phase Start*
- *Prior Task Start*

## Resetting Sync IDs

Access the Set SYNCIDs page (Set Up CRM, Common Definitions, Task Management, Reset SYNCIDs).




Set SYNCIDs page

Use this page to reset invalid sync IDs of the specified type of transactions. Task management uses sync IDs to associate tasks and CRM components from which these tasks are created.

***Warning!*** In PeopleSoft CRM, sync IDs are used as unique foreign key references to transactions. If you must reset sync IDs, use this page instead of the PeopleTools' Set Sync IDs utility.

| | |
|---|---|
| **Transaction Type** | Select the type of transactions you want to reset the sync IDs. |
| **Record (Table) Name** | Enter the name of the record containing the sync IDs that you want reset for the specified transaction type.<br>For example, if you select *Lead* as the transaction type, enter RSF_LEAD as the record (table) name. For the *Opportunity* transaction type, enter RSF_OPPORTUNITY as the record (table) name. |
| **Reset All SyncIDs** | Select to assign a new sync ID (a value that is greater than zero) for each transaction of the selected transaction type, regardless of whether the transaction currently has a sync ID, or the sync ID is a valid one.<br>If this option is clear, the system only resets invalid sync IDs, which are either null or zero in value. |
| **Reset** | Click to start the sync ID reset process. |

# Managing Tasks

This section lists common elements and discusses how to:

- Set task defaults.

- Enter additional filtering criteria.
- View task lists.
- Create tasks or update task details.
- Add persons.
- View or update task notes.
- Link transactions to a task.

## Common Elements Used in this Section

**History** The History drop-down list box displays a list of the task management pages that you accessed during the current session. Select a listed page to transfer to that page.

## Pages Used to Manage Tasks

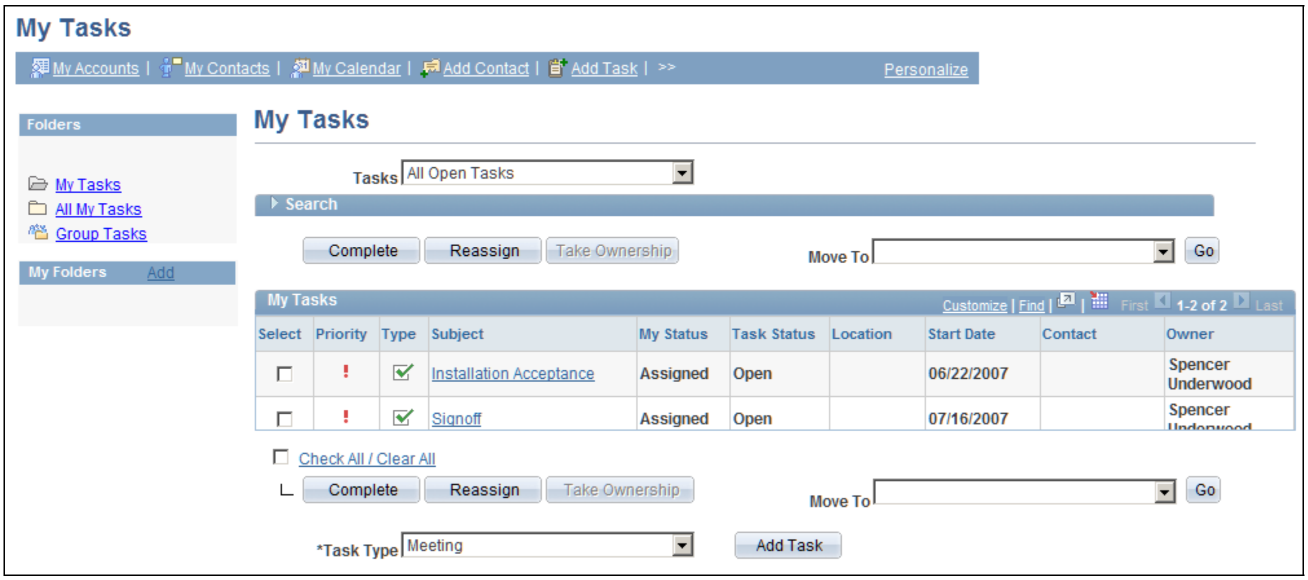
| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| My Tasks | RB_TSK_MY_TASKS | My Tasks, My Tasks | View the list of tasks that are assigned to you. You can select a task and view its details or add a task. |
| My Tasks - User Preferences | RB_TSK_PREF_SEC | My Tasks<br>Click the Preferences toolbar button in the My Tasks component. | Set defaults for tasks that you create and for how the My Tasks list appears. |
| Task Details | RB_TSK | • Click a listed task on the My Tasks page.<br>• Click the Add Task toolbar button on the My Task page.<br>• Select a task type and click the Add Task button on the My Tasks page. | Create a task or update task details. |
| Task Repeating Options | RB_TSK_REPEAT_SEC | Click the Options button next to the Repeats field on the Task Details page. | Specify the frequency with which a task repeats. This page is accessible only if you select the Show Repeating Options check box for the task type on the Task Type page. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| My Tasks - Notes | RB_TSK_NOTE | Select the Notes tab on the Task Details page. | View or add notes to a task. |
| Related Objects for the Task | RB_TSK_TXNS | Click the View or Link Related Objects link on the Task Details page. | Link related transactions to a task. |

## Viewing Tasks

Access the My Tasks page (My Tasks, My Tasks).




My Tasks page

---

**Note.** The My Tasks component has its custom setup for populating the grid with tasks and meetings, and it does not support the automatic grid population options that are available in the Configurable Search Setup (RB_FILTER_DEFN) component. The only grid initialization option that the My Tasks component supports is *Do not populate the grid,* which is also its default option.

When you access the My Tasks page, items of the grid are displayed based on the default filter that appears in the Tasks field. When you select a different filter, the system populates the grid with items that meet the new filter criteria.

---

### *Toolbar*

**Folder Counts**

Click to show the number of active tasks in each personal folder. The folder count appears as a number in parentheses after the folder name. Folder count values will only be recalculated when this button is clicked.

Folder counts do not appear for the *Group,Direct Reports,My Sales Team,* or *Delegated* folders.

 **Options**

Click to access the My Tasks - User Options page, where you can choose the default filter, default folder, and transaction type for the task list, or delegate your tasks.

### *Formatting Conventions for Folders*

Folder names have these formatting conventions:

- Orange highlight indicates the currently selected folder.
- Click the Folder Counts toolbar button to display task counts for folders. A number in parentheses after the folder name indicates the total number of active tasks in the folder. Folder counts will only be updated by clicking the Folder Counts toolbar button.

  If you move the cursor over the folder name, pop-up text lists the number of unread entries in addition to the total number of entries.

### *Folders*

**My Tasks**

Click to display task entries owned by or assigned to the user that have not been moved to other folders. You can move task entries into personal folders from the My Tasks view. You can also move tasks from any previously created personal folder back to the My Tasks folder or to another personal folder.

**All My Tasks**

Click to display all task entries from the My Tasks folder and any personal folders that you have created.

**Direct Reports**

Click to display only the task entries of your direct reports (as defined on the worker record). This folder appears only if the current user has direct reports.

When you use the direct reports view of your task list, the Direct Report drop-down list box appears so that you can further filter the list to display only entries for a specific person whom you supervise, or for all direct reports at once.

**My Sales Team**

Click to display only the task entries of your sales team. This folder appears only if the current user is a sales manager (as defined by the Territory Tree).

When you use this view of the task list, the Team Member drop-down list box appears so that you can further filter the list to display only entries for a specific person on your team, or for all team members at once.

| | |
|---|---|
| **Group Tasks** | Click to display only task entries that are associated with a provider group to which you belong. This folder appears only if the current user belongs to at least one provider group.<br>When you use the group tasks view of your task list, the Provider Group drop-down list box appears so that you can further filter the task list to display only entries for a specific provider group to which you belong, or for all provider groups at once. |
| **Delegated** | Click to display only task entries that have been delegated to you. This folder appears only if you have task items delegated to you from other users.<br>When you use the delegated view of your task list, the Delegator drop-down list box appears so that you can further filter the task list to display only entries for a specific person whose tasks have been delegated to you. |

### *My Folders*

| | |
|---|---|
| **Add** | Click to access the My Tasks - Add Folders page, where you can name and create a new personal folder. |
| **Edit** | Click to access the My Tasks - Manage Folders page, where you can rename or delete a personal folder. Note that you cannot delete a folder that contains one or more active (open) tasks.<br>This button only appears if you there is at least one personal folder to manage. |
| **<Folder Name>** | Click to view the contents of a personal folder. |

### *My Tasks*

The task priority indicator appears as a column on the left of this grid if the default priority is not assigned to the task. The task type icon appears in the column immediately to the left of the subject column.

See  and Chapter 23, "Working with Tasks," Defining Task Priorities, page 431. and Chapter 23, "Working with Tasks," Defining Task Types, page 428.

Use the following field to filter which tasks should be included in the search results:

**Tasks**

Select a filter to view only tasks that meet the filter criteria. The available filters are:

- *All Open Tasks*
- *Meetings This Week*
- *Meetings Today*
- *Overdue Tasks*
- *Tasks This Month*
- *Tasks This Week*
- *Tasks Today*
- *Tasks Tomorrow*

By default, all open tasks, appointments, and meetings appear in the task list. You can click the Options button to select a different default filter.

The search results (task list) grid displays the relevant tasks that fit the filter criteria for the search that has just been executed, and includes these fields:

**Priority** Displays the task priority

**Type** Displays the task type of the task.

**My Status** Indicates whether the task is assigned to you and whether you accepted or rejected the task.

**Task Status** Indicates the task status.

**Contact** Displays the primary contact for the task or meeting.

**Owner** Displays the task owner.

In addition to the search results, the following actions may be performed on any of the search results:

**Complete** Click this button to complete the selected task(s).

**Reassign** Click this button to reassign the selected task(s).

This button is enabled in all folders except the Group Tasks folder. Before a Group Task can be reassigned, one of the group members must take ownership.

**Take Ownership** This button is only enabled when viewing the Group Tasks folder. When clicked, it will set the task owner to the currently logged in user.

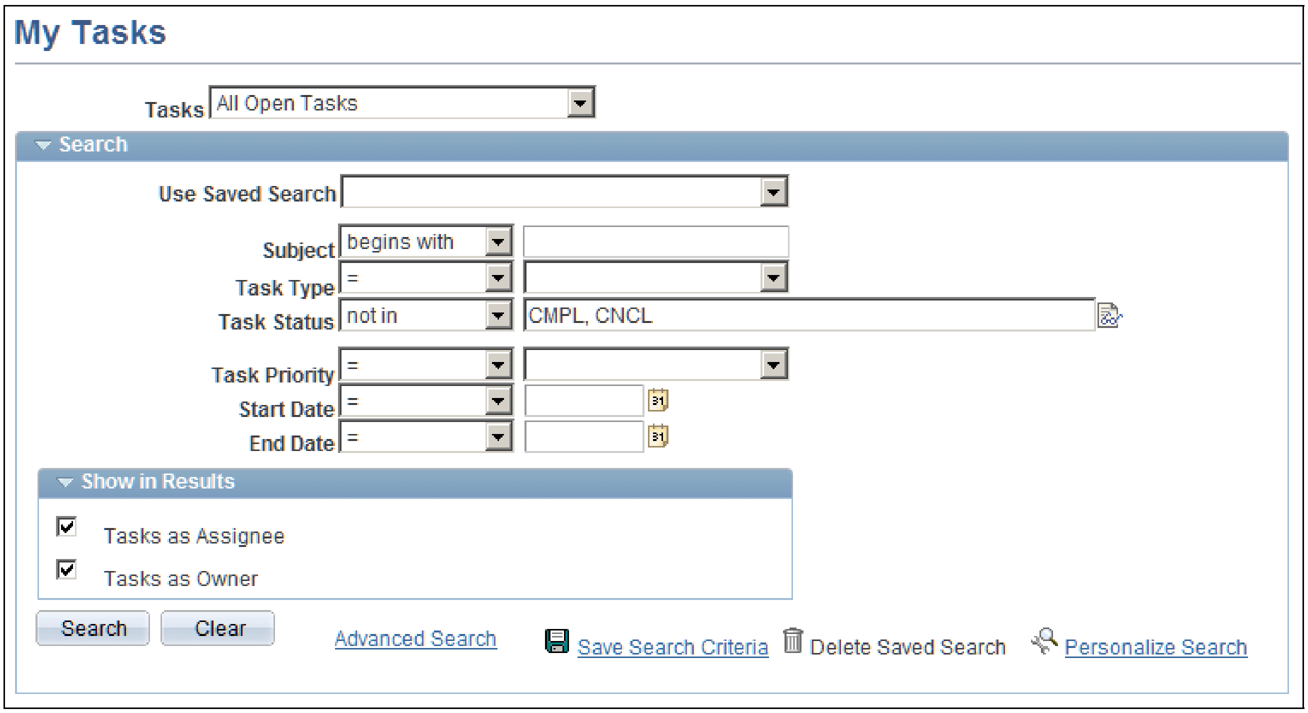
| | |
|---|---|
| **Move To,Go** | Move the selected task(s) to any other personal folder (My Tasks or any user-defined folder).<br>The Move To drop down list and corresponding Go button are only visible when in My Tasks or other personal folders. |

A new task may be created by using the following fields:

| | |
|---|---|
| **Task Type** | Select a task type for the task you wish to add. |
| **Add Task** | Click to add a task of the selected type. |

## Entering Additional Filtering Criteria

Expand the Search region of the My Tasks page.




My Tasks page [search area]

Enter one or more search criteria to filter the results by the criteria entered. To modify the columns that appear in the My Tasks grid, click the Personalize Filter link. On the Personalize Search Settings page, select or clear the check box for the appropriate column.

| | |
|---|---|
| **Task Status prompt** | Click to display a list of task statuses. Choose one or more statuses to filter the task list by those statuses. |
| **Show in Results** | Select one or more roles to display only tasks for which you have the selected roles. |

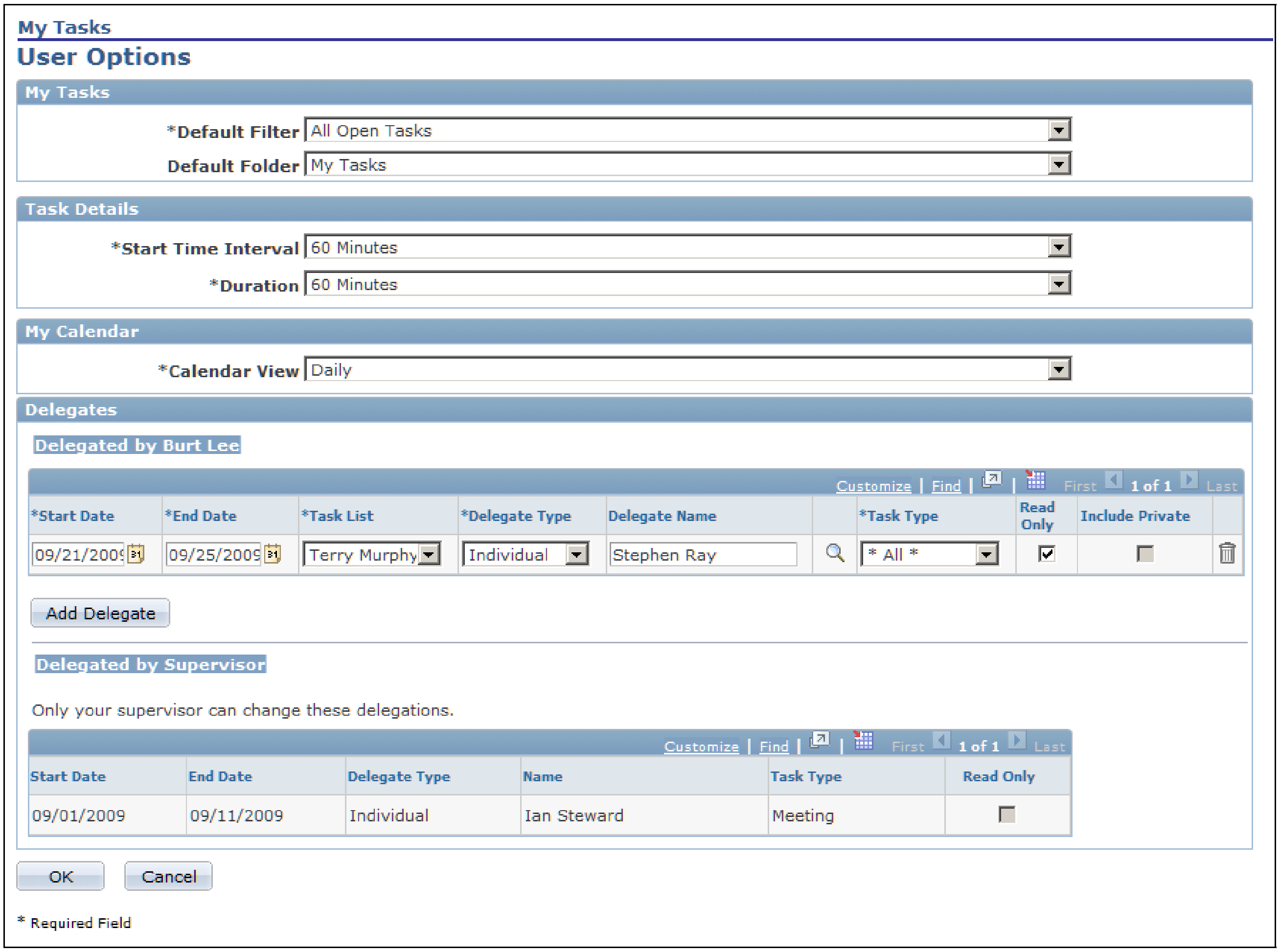
 

**Personalize Filter**

Click to access the Personalize Search Settings page, where you can modify the columns that appear on the My Tasks grid.

## Setting Task Defaults

Access the My Tasks - User Options page (click the Options toolbar button in the My Tasks page of the My Tasks component.)




My Tasks - User Options page

Use this page to personalize how tasks and calendar items appear in the My Tasks component and to set defaults for tasks that you create. The Default Filter option controls which tasks appear in the task list when you first access the component.

---

**Note.** You can also set these defaults under My Personalizations, General Options.

---

### *My Tasks*

**Default Filter** Select the filter to determine the type of transaction that you want to see when you first access your task list for a particular browser session.

**Default Folder** Select the folder that you want to see when you first access your tasks for a particular browser session.

---

**Note.** Changes to either of these settings will only appear on the My Tasks page after logging out and back into the system.

---

### *Delegates*

Use the Delegated By [Name] grid to delegate your task entries to another worker or to a provider group for a specified period of time. Supervisors may also delegate the task entries of their direct reports. When tasks are delegated to another worker, he or she will see your tasks in the Delegated folder on his or her My Tasks page.

**Start Date** Specify the start date for task delegation.

**End Date** Specify the end date for task delegation.

**Task List** Indicate the task list whose items you wish to delegate.

**Note.** This field only appears for supervisors, and allows them to define delegation of their own tasks, the tasks of one of their direct reports, or the tasks of all of their direct reports.

**Delegate Type** Indicate if you are delegating tasks to a provider group or to an individual.

**Name** Specify the name of the provider group or of the individual to whom you wish to delegate the tasks.

**Task Type** Indicate the task type that you wish to delegate.

**Read Only** Select this option to allow the delegated provider group or individual read-only access to the tasks.

**Note.** A sales manager will have owner access even for tasks delegated to his team members with read-only access.

**Include Private** Select this option to allow the delegated provider group or individual access to your personal tasks.

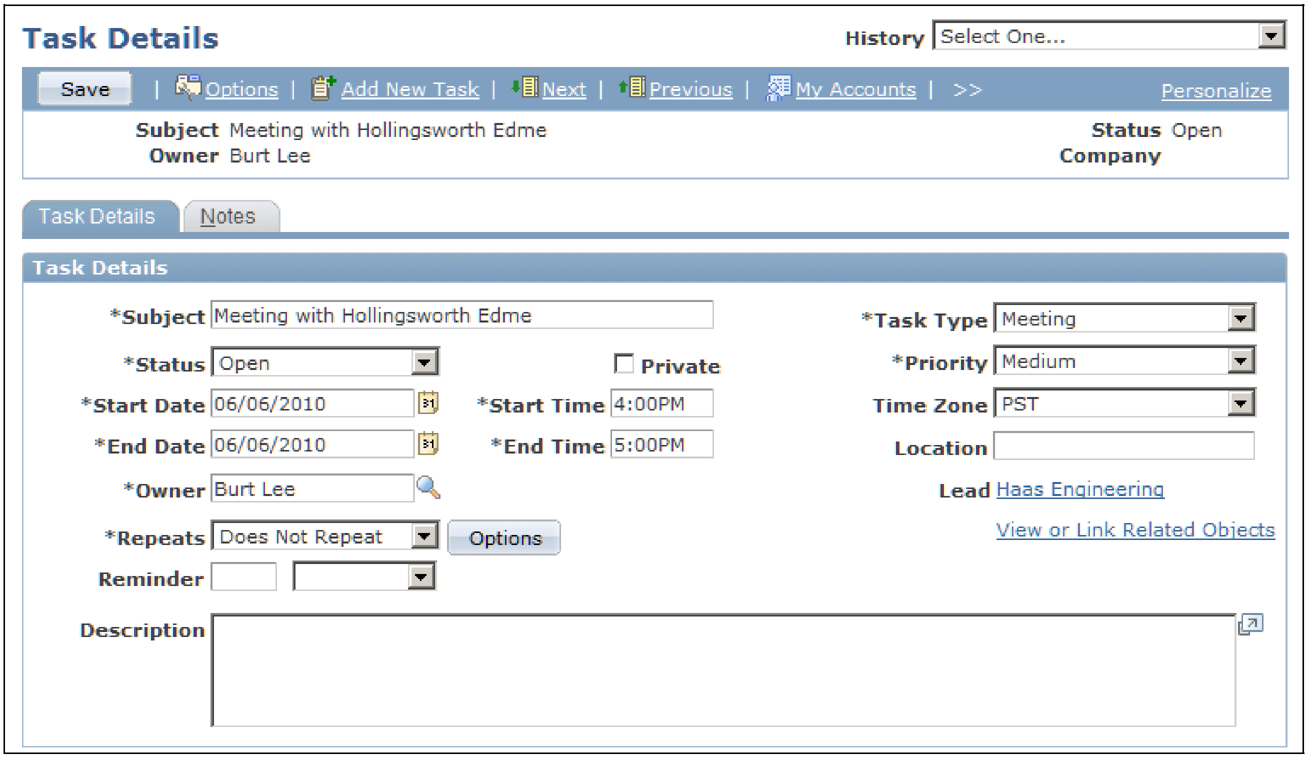
**Note.** A supervisor may not delegate the personal tasks of a direct report.

Use the Delegated By Supervisor grid to view any delegation of your tasks that has been made for you by your supervisor. Workers cannot change these entries: they may only view them.

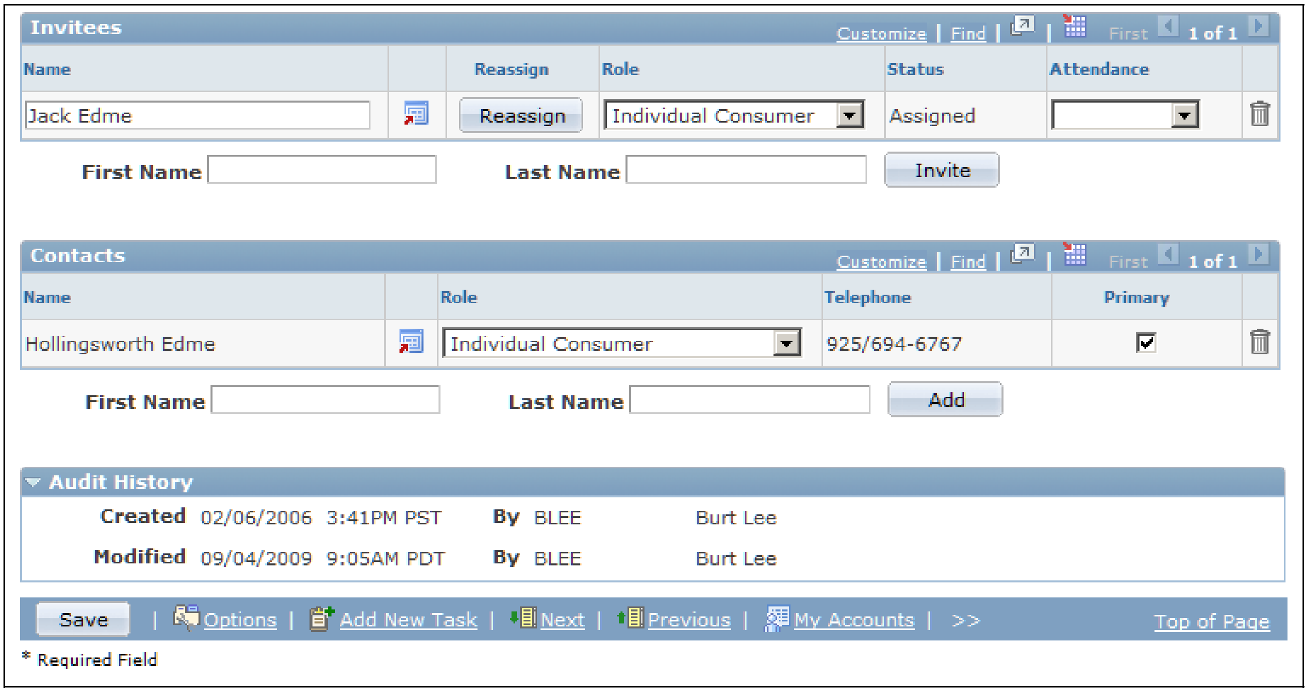
## Creating Tasks or Updating Task Details

Access the Task Details page (click a listed task on the My Tasks page).




Task Details page (1 of 2)




Task Details page (2 of 2)

### *Task Details*

**Subject**

Enter the meeting subject that appears on the My Tasks list.

**Task Type**

Select a task type if you access this page from the toolbar. If you access this page from the My Tasks page, the system displays the task type you select on the My Tasks page.

**Status**

Select the status of the task from the list of available statuses: *Cancelled, Completed, In Progress,* and *Open.*

**Private**

Select to permit only the task owner to access task details.

**Start Date, Start Time, End Date,** and **End Time**

Enter the starting and ending dates and times of the task.

---

**Note.** If a task already has a start date and an end date, changing the start date (or start time) will also change the end date (or end time) by an equal amount (to maintain the original duration of the task). You may change this defaulted end date or time value, if desired.

---

**Provider Group**

Enter the name of the provider group that owns this task. A task must be associated with a provider group or an individual owner (or both).

---

**Note.** This will only be visible on a task if the corresponding Task Type definition has been configured to display this field. If this field is not visible for a particular task, a value in the Owner field will be required.

---

**Owner Name**

Enter the name of the individual task owner. The owner might not actually perform the task, but is responsible for task completion. If the task is also associated with a provider group, then only members of that provider group will be available as choices for the owner: otherwise any worker may be selected as an owner.

**Repeats**

Select the reoccurrence frequency for the task.

**Options**

Click to access the Task Repeating Options page (RB_TSK_REPEAT_SEC) configure the settings for the repeating task.

**View or Link Related Objects**

Click to link a company, lead, opportunity, partner, or referral to the task. This link appears only if View or Link Transactions was selected on the Task Type page. Clicking this link accesses the Related Objects for the Task page (RB_TSK_TXNS) where you can search for and select objects to link to the task.

---

**Note.** If you select a company, lead, opportunity, partner or referral on the Related Objects for the Task page, the name of that object appears as a link above the View or Link Related Objects link. If you click the link, the system takes you to the page where the object was originally established. If a company has one or multiple contacts, the system still takes you to the Company page.

---

**Reminder**

If you want to receive a reminder for this task, enter the number of days, hours, or minutes the reminder should send before the task is scheduled to begin.

---

**Note.** If the reminder time for the newly created task is within an hour from the current time, the task reminder is sent immediately regardless of when the reminder time was set originally. This occurs because the task reminder daemon is programmed to pick up and process reminder emails that are set between an hour before and an hour after the current time. However, if the reminder is set to occur further than an hour from the current time, the daemon sends the reminder as specified.

For example, if the current time is 9 am, the task start time is 10 am, and the reminder is set for 10 minutes (09:50 am), the reminder time falls in the time range within which the task reminder daemon picks up and processes reminder emails (8-10 am). In this case, the system sends the reminder email immediately.

In another example where the current time is 9 am, the task start time is 11 am, and the reminder is set for 10 minutes (10:50 am). Since the reminder time does not fall in the time range within which reminders are processed immediately (8-10 am), in this case, the system sends the reminder email at the preset reminder time.

---

### *<Invitees / Assignees>*

The label of this grid changes depending on the task type. As delivered, the label is Invitees for the *Meeting* task type and Assigned To for task types *Activity, Approval,* and *Mtg.*

The systems displays different information in this section based on how you configured the Task Type page. You can add this grid to add task types or modify the labels using the Task Type page.

**Display Name**

Enter the name of the person to whom the task is assigned or who is invited to the meeting.

**Reassign**

Click to replace the meeting invitee with another contact. The system sends the new invitee an email. The system removes the task from the original invitee's task list.

**Create**

Click to create the meeting invitee as a contact in the CRM system. For invitees who are not available in CDM, the Create button is presented for you to add the invitee as a contact using Quick Create.

**Note.** If CDM integration is enabled, the duplicate prevention logic is triggered when you click the Create button. The Evaluate Duplicate Person page appears if it finds duplicate entries that resemble the contact you are about to add. You can select an existing match from the list that returns, or choose to create a new person record for that invitee in CDM.

**Role**

Select the person's role. The company name that the person represents appear in the list, as well as other roles the person has, such as *Individual Consumer.*

**Status**

Indicates the status of the task assignee: *Assigned, Accepted,* or *Declined.*

**Attendance**

Select *Absent* or *Attended.* This field is available only if you select Record Attendance on the Task Type page.

**Invitation Type**

Select whether the invitation is *Mandatory, FYI,* or *Optional* for the invitee. This column appears only if the Show Invitation Type field is selected for this task type on the Task Type page.

### *Contacts*

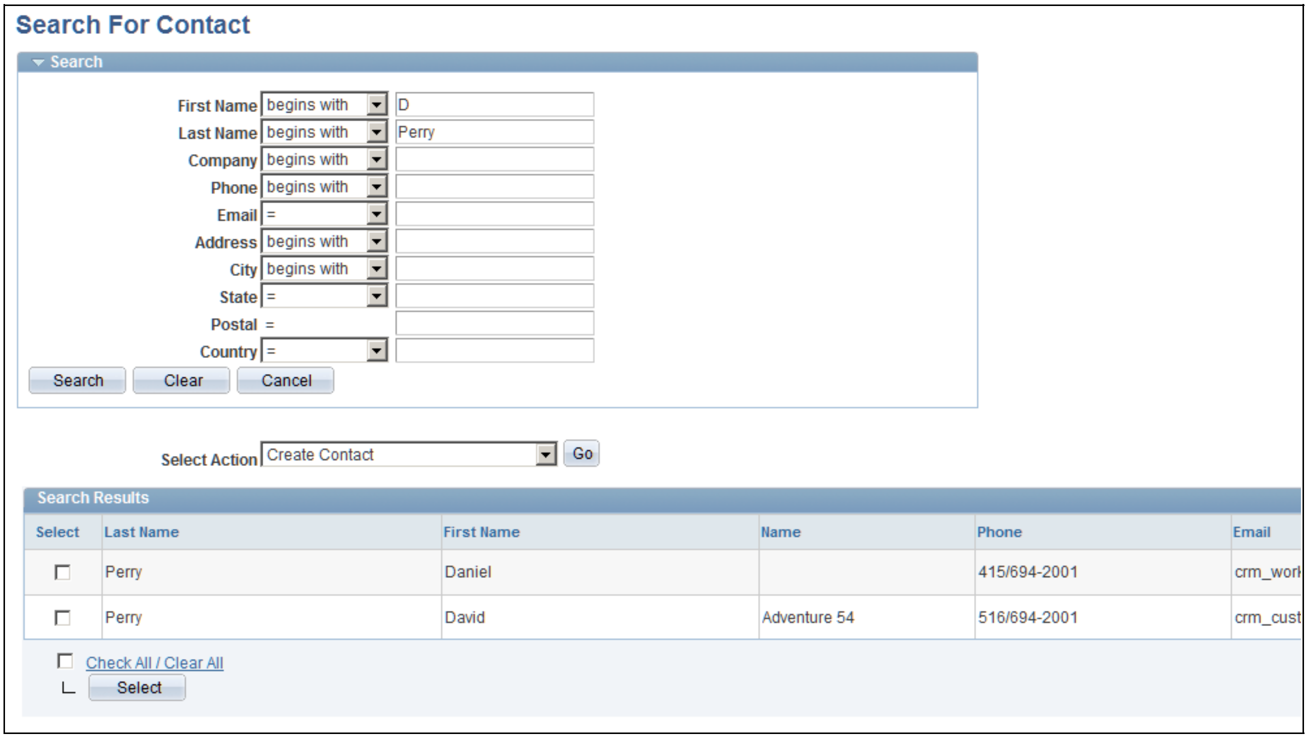
**Primary**

Select to indicate that the contact who is listed in the row is the primary contact for this task. There is only one primary contact for a task, and the primary contact name appears for the task when it is listed on the My Tasks page.

## Adding Persons

To add a person to either the Invitees grid or the Contacts grid, enter a first and last name below the grid and click the Invite or Add button.

If the first and last name do not uniquely identify a person, the Search For Contact page appears. Select one or more listed persons and click Select.




Search For Contact page

The selected persons are added to the task and you are transferred back to the Task Details page. You can also enter new search criteria or return to the Task Details page without making any selections.

The task owner and assignee can reassign the task by changing the person name in the assignee box.

***See Also***

Chapter 23, "Working with Tasks," Setting Up Task Management, page 427

## Viewing or Updating Task Notes

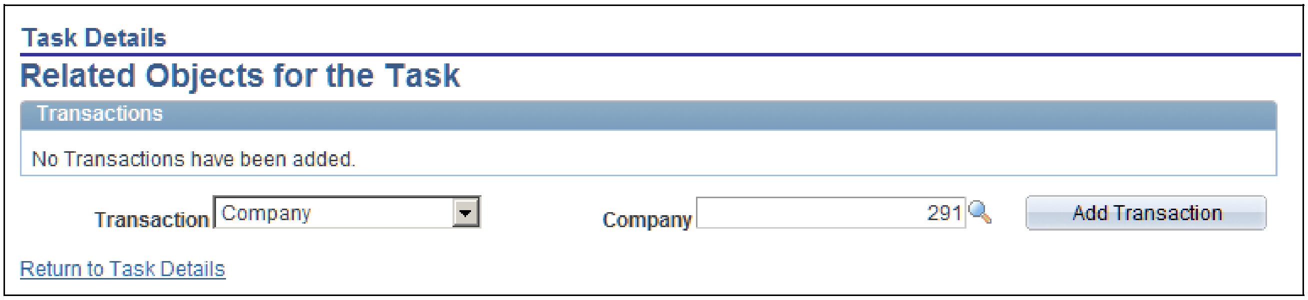
Access the My Tasks - Notes page (select the Notes tab on the Task Details page).

See  and Chapter 5, "Working with Notes and Attachments," page 137.

## Linking Transactions to a Task

Access the Related Objects for the Task page (click the View or Link Related Objects link on the Task Details page).




Transactions for the Task page

When you select a transaction type, the text that appears next to the Add Transaction button changes to reflect the transaction type.

**Primary** Select to designate that this is the primary transaction that is associated with the task. The system displays this task on the Task Details page in the field above the View or Link Related Objects link.

**Transaction** Select a transaction type.

**Add Transaction** Select to choose a transaction from a list of transactions for the selected transaction type.

# Viewing Calendars

This section discusses how to view calendars.

## Pages Used to View Calendars

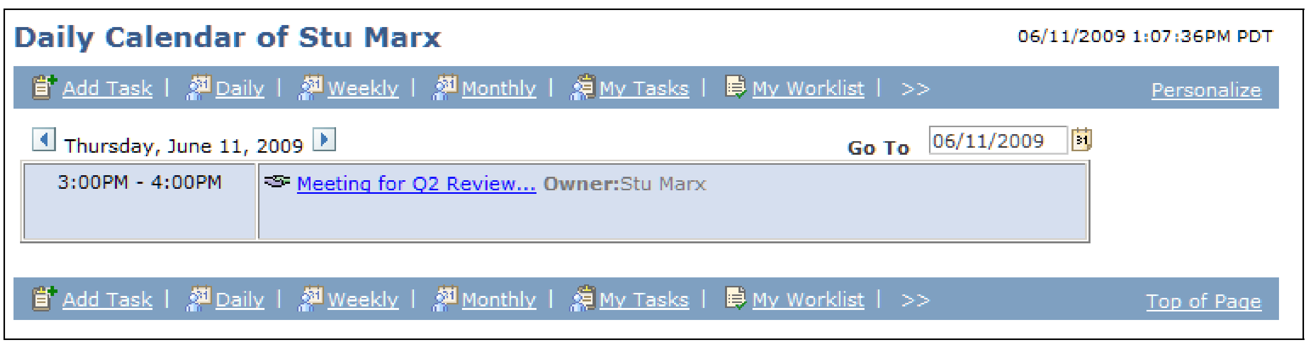
| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
| --- | --- | --- | --- |
| Daily Calendar of <name><br>Weekly Calendar of <name><br>Monthly Calendar of <name> | RB_TSK_CALENDAR | • My Calendars<br>Click the Daily, Weekly, or Monthly toolbar buttons.<br>• My Tasks<br>Click the My Calendar toolbar button.<br>Click the Daily, Weekly, or Monthly link. | View or update a calendar. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Daily Team Calendar of <name><br><br>Weekly Team Calendar of <name><br><br>Monthly Team Calendar of <name> | RB_TSK_CALENDAR | On the daily, weekly, or monthly calendar, click the View My Team's Calendar link. | View calendar entries for other individuals. |
| Another's Calendar for <name> | RB_TSK_CAL_SRCH | On the daily, weekly, or monthly calendar, click the View Another's Calendar link. | Search for another person to view his or her calendar. |
| Provider Group Calendar of <name> | RB_TSK_CALENDAR | On the daily, weekly, or monthly calendar, click the View Provider Group's Calendar link. | View a provider group's calendar. |
| My Calendar - Options | RB_TSK_PREF_SEC | My Calendar<br><br>Click the Options button on the toolbar in the My Calendar component. | Set the default calendar view (daily, weekly, or monthly). |

## Viewing or Updating Calendars

Access the Daily [or Weekly or Monthly] Calendar of <name> page (My Calendars. Click the Daily, Weekly, or Monthly link).



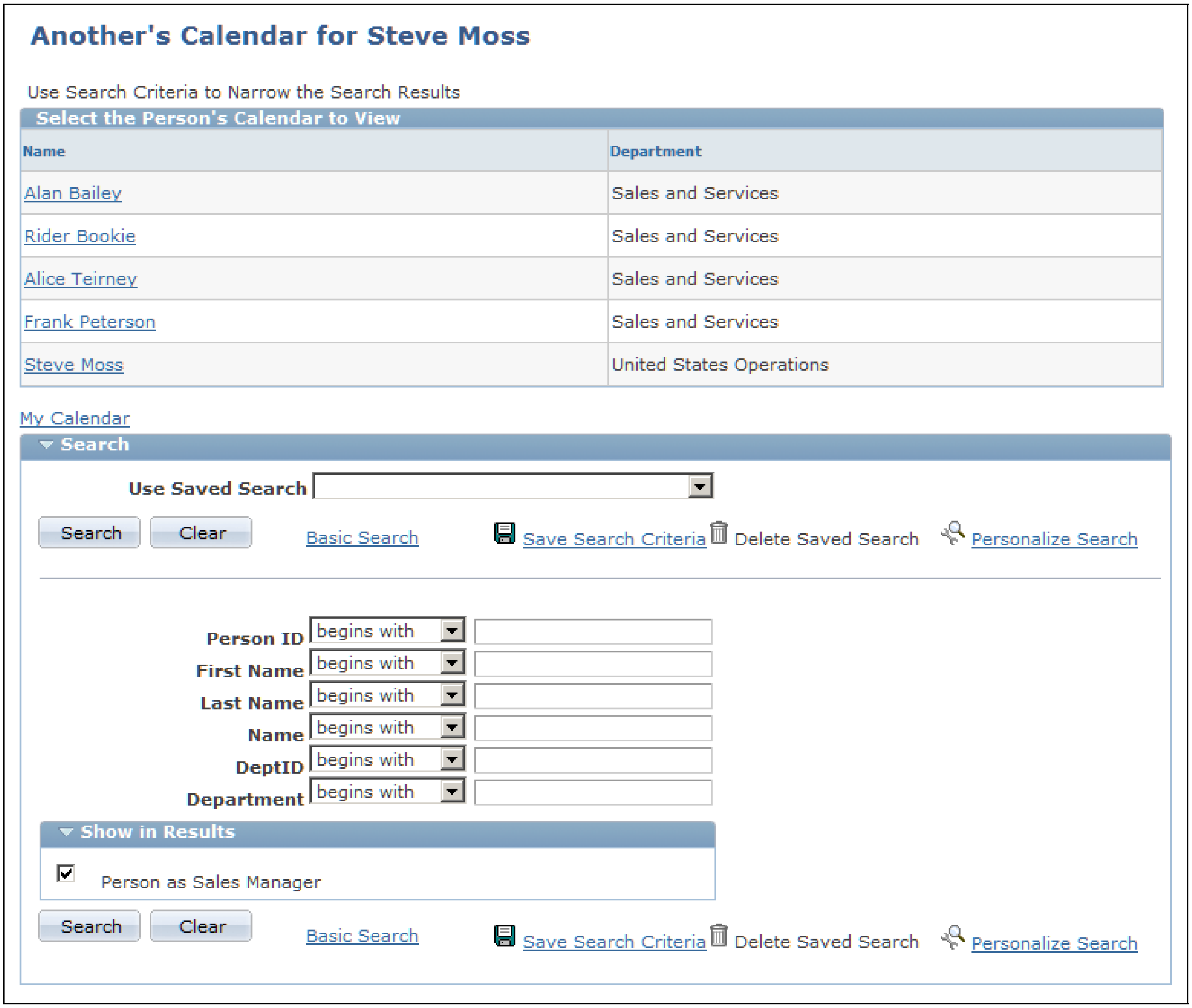

Daily Calendar of <name> page

See  and Chapter 16, "Using Calendars," page 257.

## Viewing Another Person's Calendar

Access the View Another's Calendar for <name> page (click the View Another's Calendar link on the daily, weekly, or monthly calendar).




Another's Calendar for <name> page

### *Select the Person's Calendar to View*

Search for the person whose calendar you want to see. You can click a person's name to view their calendar or refine the search criteria and search again.

### *Show in Results*

Select one or more listed relationships. Only those persons who meet the search criteria and have the selected relationships to you appear in the search results.

## Chapter 24

# Working with Call Reports

This chapter provides an overview of call reports in PeopleSoft CRM and discusses how to:

- Add call reports.
- Add related objects to the call report.

## Understanding Call Reports

Sales call reports document a contact event such as a meeting, demonstration, or phone call. They are always produced after the event and are follow-up memos documenting the attendees, what took place during the event, and any follow-up tasks.

You can view or add call reports directly to a company, consumer, contact, lead, opportunity, or task from the Call Reports tab on these components. When you add a call report to a lead, opportunity, or task, the call report is linked to the customer for the lead, opportunity, or task.

You can view call reports for a customer or contact from the Call Reports tab on the Customer 360-Degree View page or access call reports directly from the left hand navigation. If you have licensed PeopleSoft CRM Portal Pack, you can view your own call reports in the My Call Reports pagelet that you can add to your home page by using the Personalize link.

The Call Report component is enabled for the Service Oriented Architecture (SOA), which enables you to call the Call Report web service to create, retrieve, and update call reports from both PeopleSoft and external systems.

See  and *PeopleSoft Portal Pack 9.1 PeopleBook*, "Oracle's PeopleSoft CRM Portal Pack Preface."

See  and Appendix B, "Delivered Web Service and Service Operations for CRM Common Components," Call Report Web Service, page 609.

## Working with Call Reports

This section lists the pages used to access call reports and discusses how to add call reports.

## Pages Used to Work with Call Reports

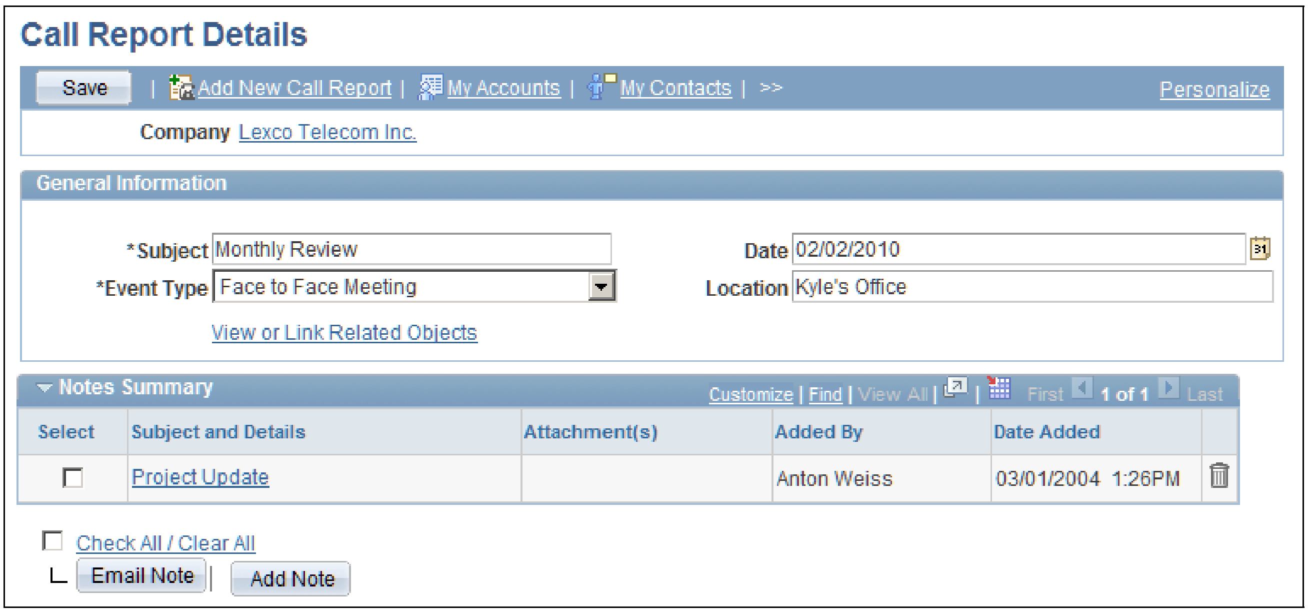
| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Call Report Details | RD_CALL_REPORT | • Click My Contacts. Select a contact. Then select *Add Call Report for Contact(s)* in the Action field and click Go.<br>• Sales, Add Call Report<br>• Sales, Search Call Reports | Add, search, or update a call report.<br>**Note.** You can also navigate to the Call Report Details page from the Call Reports page in the Company, Person, Partner Company, Lead, or Opportunity components. |
| Company - Call Reports<br>Partner Company - Call Reports | RD_CALLRPT_LST_TXN | • Customers CRM, Search Company, Company<br>Select the Call Reports tab.<br>• Partners CRM, Search Partner Company, Partner Company<br>Select the Call Reports tab. | View a list of call reports for a company or partner company. |
| Person - Call Reports | RD_PRSN_CALL_RPTS | Customers CRM, Search Person, Person, Call Reports | View a list of call reports for a consumer or contact. |
| Lead - Call Reports<br>Opportunity - Call Reports | RSF_CALL_RPTS | • Sales, Search Leads, Leads<br>Select the Call Reports tab.<br>• Sales, Search Opportunity, Opportunity<br>Select the Call Reports tab.<br>• Partners CRM, Search Partner Company, Partner Company<br>Select the Call Reports tab. | View or add call reports on a lead or opportunity. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Related Objects for the Call Report | RD_CALLRPT_TXNS | Click the View or Link Related Objects link in the General Information section on the Call Report page or on the Call Report Details page. | View a list of related objects (companies, leads, opportunities, and partner companies) for the call report or add a related object to the call report. |

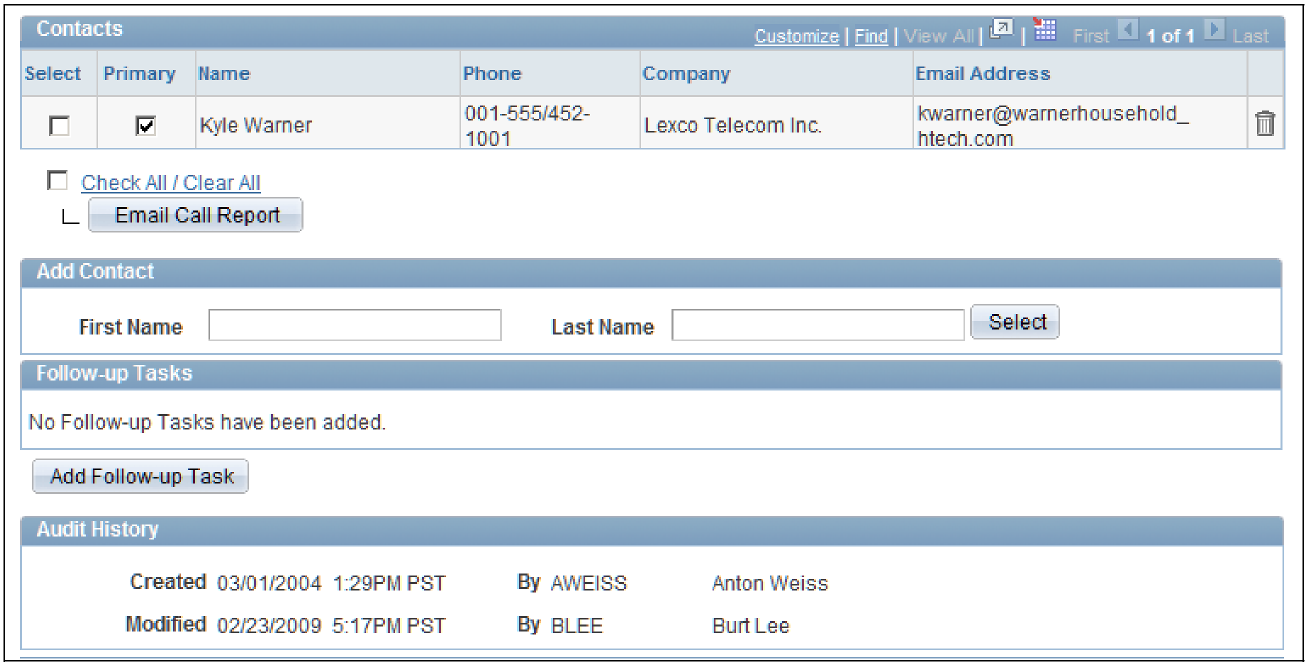
## Adding Call Reports

Access the Call Report page (Click My Contacts. Select a contact. Then select Add Call Report for Contact(s) in the Action field and click Go).




Call Report Details page (1 of 2)




Call Report Details page (2 of 2)

### General Information

Enter information that describes the event.

**Event Type** Select one of these values: *Face to Face Meeting*, *Telephone*, or *Other*.

**View or Link Related Objects** Click to access the Related Objects for the Call Report page where you can view or add related companies, leads, opportunities, and partner companies.

### Add a Note and Notes Summary

Enter notes and attachments that relate to the event.

See  and Chapter 5, "Working with Notes and Attachments," page 137.

### Contacts

View the list of contacts that attended the event and designate the primary contact.

**Email Call Report** Select one or more contacts and then click this button to email the call report to the selected contacts.

**Note.** You must save a call report before you can email it.

### Add Contacts

You can add CRM contacts, if necessary, to this call report by entering first and last names. If CDH integration is enabled, the duplicate prevention logic is triggered when you click the Select button. If it finds duplicate entries that resemble the contact you are about to add, you can either select an existing match from the list that returns, or choose to create a new person record in CDM using Quick Create.

### Follow Up Tasks

View the list of tasks associated with the event. When you create a follow up task for a call report, its contacts are assigned as the contacts for the task by default.

| | |
|---|---|
| **Add Follow-Up Task** | Click to access the Task Details page. |

See and Chapter 23, "Working with Tasks," page 423.

## Adding Related Objects to the Call Report

Access the Call Report Details - Related Objects for the Call Report page (click the View or Link Related Objects link in the General Information section on the Call Report page or on the Call Report Details page).


Call Report Details - Related Objects for the Call Report page

Select a related object; either *Company, Lead, Opportunity,* or *Partner*. The field to the right changes based on your selection. Select the related object. Click the Add Related Object button.

Click the Return to Call Report Details link to go back to the Call Report Details page.

## Chapter 25

# Working with Exchange Integration

This chapter provides an overview of PeopleSoft CRM and Microsoft Exchange integration and discusses how to:

- Specify PIM users for synchronization.
- Review synchronization logs.

## Understanding PeopleSoft CRM and Microsoft Exchange Integration

This section discusses:

- PeopleSoft CRM and Microsoft Exchange integration.
- Synchronization of contacts.
- Synchronization of calendar entries.
- Use of category.
- Conflict resolution.

### PeopleSoft CRM and Microsoft Exchange Integration

The PeopleSoft CRM and Microsoft Exchange integration provides enterprise users the ability to synchronize contact and calendar data between CRM and Exchange (data in Exchange is accessible to users through Microsoft Outlook). This integration is driven by Oracle Business Data Synchronization Server (BDSS), an Oracle Fusion Middleware synchronization technology service that facilitates data exchanges between different types of Personal Information Management (PIM) data stores, PeopleSoft CRM and Microsoft Exchange in this case.

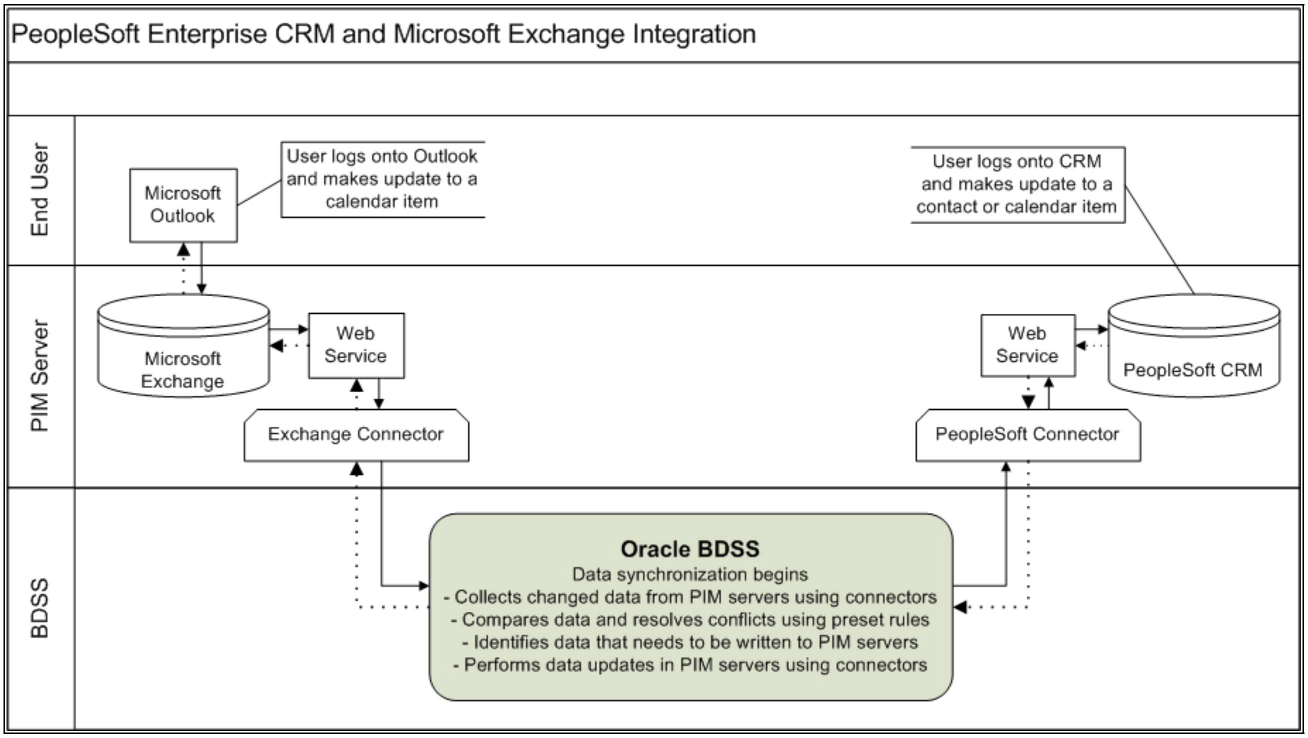
Through this integration, contacts that are added or updated from the CRM system are synchronized to Microsoft Exchange and then Outlook. Calendar entries that are added, updated or removed from one PIM system are synchronized to the other system. Data synchronization takes place behind the scenes and requires no end-user intervention.

### Data Synchronization Process Flow

BDSS is a synchronization service that enables server data stores to exchange and compare data. It is the center of a hub and spoke architecture in which different PIM systems synchronize enterprise data with one another through it. BDSS interacts with PIM systems using *connectors,* which are standard communication interfaces between the hub (BDSS) and its spokes (PIM systems). As a synchronization process begins, connectors pass changed data from PIM systems to BDSS to be processed. In the case of PeopleSoft CRM, the PeopleSoft connector retrieves changed data for users from the CRM system through the Contact and Calendar web services that the CRM system delivers. Data is then transformed into a compliant format and passed to BDSS. At the end of the process, connectors write the synchronized data that they receive from BDSS back to their PIM systems.

This diagram illustrates how data flows amongst BDSS and PIM servers in a synchronization process:




Data Flow between PeopleSoft CRM and Microsoft Exchange and Outlook in a synchronization process

Here is a sample synopsis of the synchronization process flow at runtime:

1. User Jane Doe updates a meeting of hers in her Outlook client.

   User Stephen Ray creates a business contact in CRM.

2. The synchronization process is invoked in BDSS by a scheduler program as set up in the system.

   BDSS performs a number of tasks for the synchronization process, which include:

   - Identifying the list of users to be included in the process and verifying that they are available for synchronization.
   - Connecting to the CRM and Exchange connectors respectively, asking from each of the two server systems for the set of records that have created or changed for each user since the last synchronization.

     Contact data from CRM is extracted based on the users included in the process, the last synchronization date and time and the predefined dataset rules.

     Calendar data from CRM is extracted based on the users included in the process and the last synchronization date and time.
   - Processing the data that was extracted from CRM and Exchange through their connectors.

     Contact data from CRM is transformed to the Exchange-compatible format within the PeopleSoft connector, and is compared with the contact data that is collected from Exchange in BDSS. The comparison is done between contact pairs (for example, John Doe from CRM and John Doe from Exchange) that are mapped by their record IDs. The mapping table is stored in BDSS. In case of new contacts, no record ID mapping is available. New contacts are compared to Exchange contacts based on the predefined comparison fields (first name, last name and email address). As there are no Exchange contacts to compare to, these new CRM contacts will be created in the Exchange system later in the process.

     Calendar data from CRM is transformed to a standardized internet calendar format (called *iCal*) within the PeopleSoft connector, and is compared with the calendar data from Exchange in BDSS. The remaining processing logic is similar between calendar entries and contacts.
   - Resolving any data conflict that arise in the process, and preparing the result data set to be updated in each PIM server.

     As delivered, CRM records take precedence of Exchange records in case of data conflict.
   - Passing the result data set to corresponding connectors.
3. CRM and Exchange connectors receive their result sets and update the contact and calendar information for users in their servers accordingly.
4. The synchronization process is completed. User Jane Doe sees her updated meeting in CRM, and the contact that user Stephen Ray created is now available in his Outlook application.

Refer to the installation guide for information on installing the PeopleSoft CRM 9.1 Personal Information Management Server and setting up synchronization in BDSS and PeopleSoft CRM.

See *PeopleSoft Enterprise Customer Relationship Management 9.1 Personal Information Management Server Sync Installation Guide*

---

**Note.** The CRM and Exchange integration, also known as PIM Server Synchronization, is a licensed product offering. PeopleSoft CRM provides an installation option (called *PIM Server Sync*) for this integration on the General Options page. You can, for informational purposes, turn it on to indicate that the integration has been activated for the CRM system.

---

See  and Chapter 3, "Setting Up General Options," Setting Up General Options, page 28.

### *Scheduling of Data Synchronization*

Oracle Business Data Synchronization Server provides a Java program (called *DispatcherClient*) that initiates the data synchronization process and this program can be called from a command line manually, or a scheduler program (for example, Windows' Scheduled Tasks or Oracle Enterprise Manager Scheduler) to run automatically on a schedule. Refer to the BDSS documentation for more information on scheduling data synchronization processes.

See *Oracle Fusion Middleware Administrator's Guide for Oracle Business Data Synchronization Server*

### *Users*

To include users in the synchronization process, they need to be defined in both the BDSS and CRM systems as part of the setup.

See and Chapter 25, "Working with Exchange Integration," Specifying PIM Users for Synchronization, page 472.

In addition, create a SuperUser in the CRM system. This user is served as an administrator user who has all the necessary security privileges to facilitate data synchronization, including access to the contact and calendar web services as it is being used to invoke these web services on behalf of PIM users at runtime.

Do not create the SuperUser as a PIM user in both systems, and do not make any calendar updates using this SuperUser ID.

Refer to the installation guide for instructions on how to create PIM users and the SuperUser.

See *PeopleSoft Enterprise Customer Relationship Management 9.1 Personal Information Management Server Sync Installation Guide,* Setting Up Synchronization in BDSS and PeopleSoft CRM

### *See Also*

Appendix B, "Delivered Web Service and Service Operations for CRM Common Components," Contact Web Service, page 613

Appendix B, "Delivered Web Service and Service Operations for CRM Common Components," Calendar Web Service, page 614

## Synchronization of Contacts

The CRM and Exchange integration enables you to synchronize contact information between them. This table lists the actions and the directions of data flow that are supported when synchronization takes place:

| *Action* | *From* | *To* | *Result* |
|---|---|---|---|
| Add Contact | CRM | Outlook | New contact added to Outlook with the *Peoplesoft* category. |
| | Outlook | CRM | Not synchronized to CRM. |

| ***Action*** | ***From*** | ***To*** | ***Result*** |
|---|---|---|---|
| Update Contact | CRM | Outlook | Updated contact modified in Outlook. The contact has the *Peoplesoft* category. |
| | Outlook | CRM | Updated contact (who was originally created in CRM) modified in CRM. The contact has the *Peoplesoft* category.<br><br>Contacts who were originally created in Outlook are not synchronized to CRM. |
| Delete Contact | CRM | Outlook | Not synchronized to Outlook. |
| | Outlook | CRM | Not synchronized to CRM. |

### *Contact Creation*

In PeopleSoft CRM, users access the My Contacts component to add new contacts to their own contact list. When a synchronization session completes, users can see from their Outlook clients the contacts that were created from CRM between the synchronization that was just finished and the one prior to that. These contacts are tagged with the *Peoplesoft* category, a hard-coded filter criterion used to identify data that is subject to synchronization. In addition to contacts on user's contact list, the synchronization process also propagates to Outlook systems contacts that are referenced in leads and opportunities to which the user is assigned. PeopleSoft leverages dataset rules to conclude the set of contacts that need to be synchronized in Exchange for each user.

---

**Note.** Users in CRM can add contacts through other means, such as the Person component or any other transactional pages that support the creation of contacts (using Quick Create), for example, Leads and Opportunities.

---

Contacts created in Outlook are not synchronized to CRM.

### *Contact Update*

When users modify contact information, such as name, email address, phone and physical address, in the CRM system, the same change is synchronized to Microsoft Exchange and reflected in the Outlook clients for users who have access to those contacts based on dataset rules.

Similarly, contact updates made from Outlook are available in CRM after synchronization. However, instead of overwriting old contact information with the new update, modified information is added as new entry for contacts in CRM. Old contact information remains in the system. This behavior is similar to making a modification to the contact phone and email information in the Lead or Opportunity component.

As mentioned previously, contacts created from Outlook are excluded from the synchronization process. Therefore, the process supports updates of contacts who were originally created from CRM only; updates of contacts that were created from Outlook are ignored. Contact updates coming from the Exchange system are based on the sync data of BDSS (the BDSS hub knows which contacts were created originally in the CRM system). Contact changes that have been synchronized to CRM from Outlook will be synchronized back to all Exchange users who have access to the contacts.

---

**Note.** When adding phone numbers in Outlook, enter them in this format: xxx-xxx-xxxx. Do not include spaces.

When adding addresses in Outlook, you must enter countries or regions for them to be synchronized to CRM.

---

### Contact Deletion

Contacts deleted in Outlook are not synchronized to CRM.

Contact records cannot be deleted from CRM, however, they can be removed from users' contact lists (on the My Contacts page). Removal of contacts from a user's contact list is *not* synchronized to Exchange.

### Contact Method Deletion

Removal of contact methods (for example, phone, email address, or physical address) from contacts in CRM is synchronized to Exchange.

### Use of Datasets to Filter Contacts for User's Outlook

To help control the distribution of data more effectively and shorten the time needed for data synchronization, datasets are used as a data filtering mechanism in the synchronization process. Outlook users receive a subset of contact data from the CRM system that pertains to their individual business use based on dataset rules, which are a series of sub queries of views that select the newly added or updated contact data that gets downloaded and updated in the Outlook system during synchronization.

PeopleSoft delivers these dataset rules under the RBP_CONTACTS dataset for synchronization on contacts; any given user receives data updates on their Outlook applications for:

- Contacts that are created by the user.
- Contacts on leads in which the user is present.
- Contacts on leads that are created by the user.
- Contacts on opportunities in which the user is present.
- Contacts on opportunities that are created by the user.

With these dataset rules in place, the user will not see any contacts that do not pertain to his or her work on Outlook at the end of the synchronization.

The use of datasets does not apply to calendar entries.

Refer to *PeopleSoft 9.1 PeopleBook: Enterprise Components*, Using Datasets, *Defining Dataset Rules* for more information on datasets.

### Field Mapping

A field mapping identifies the field a piece of data gets extracted from the source system and the corresponding field it gets displayed in the target system at the end of a synchronization run. This table lists the delivered field mappings between PeopleSoft CRM and Outlook contacts:

Contact Name:

| PeopleSoft | Outlook |
|---|---|
| First Name | First |
| Name | Full Name |
| Last Name | Last |
| Middle Name | Middle |
| Title | Job title |

Contact Address (mapping applies to the *Business, Home* and *Other* types):

| Type | PeopleSoft | Outlook |
|---|---|---|
| Business, Home, or Other | Address 1 | Street |
| | Address 2 | Street |
| | Address 3 | Street |
| | Address 4 | Street |
| | City | City |
| | State | State/Province |
| | Country | Country/Region |
| | Postal | ZIP/Postal code |

**Note.** Data from the Address 1, Address 2, Address 3 and Address 4 fields is merged into the Street field during synchronization. Each PeopleSoft address line appears as separate lines in the Street field. When Outlook addresses are synchronized to the CRM system, data in the Street field is parsed into Address 1, Address 2 and Address 3 fields respectively.

Contact Phone Number (mapping applies to the *Business, Home* and *Cellular* and *FAX* types):

| Type | PeopleSoft | Outlook |
|---|---|---|
| Business | Number | Business Local number |
| Home | Number | Home Local number |
| Cellular | Number | Mobile Local number |
| FAX | Number | Business Fax Local number |

Contact Email (mapping applies to the *Business* type):

| *Type* | *PeopleSoft* | *Outlook* |
|---|---|---|
| Business | Email Address | E-mail |

Additional Fields:

| *PeopleSoft* | *Outlook* |
|---|---|
| Customer<br>If a contact is associated with multiple customers (companies), names of these companies are concatenated (separated by semicolons) into the Company field in the Exchange system after synchronization. | Company |
| Department | Department |

## Synchronization of Calendar Entries

The CRM and Exchange integration enables you to synchronize calendar entries between them. This table lists the actions and the directions of data flow that are supported when synchronization takes place:

---

**Note.** *Invitees* in CRM are called *attendees* in Outlook.

---

| *Action* | *From* | *To* | *Result* |
|---|---|---|---|
| Add Calendar Entry | CRM | Outlook | New calendar entry added to Outlook with the *Peoplesoft* category. |
| | Outlook | CRM | New calendar entry added to CRM as:<br>• *Appointment* if there are no invitees.<br>• *Meeting* if there are invitees. |
| Update Calendar Entry | CRM | Outlook | Modified calendar entry updated in Outlook. |
| | Outlook | CRM | Modified calendar entry updated in CRM.<br>The entry has the *Peoplesoft* category.<br>**Important!** Only changes that are made by the creators of calendar entries get synchronized to CRM. Changes made by invitees are not synchronized to CRM. |

| ***Action*** | ***From*** | ***To*** | ***Result*** |
|---|---|---|---|
| Delete Calendar Entry | CRM | Outlook | If an invitee cancels a calendar entry in CRM, it is marked as *Cancelled* in CRM, and is removed from Outlook if synchronization has already taken place, or it is not created in Outlook if synchronization has not occurred. The owner sees the entry in Exchange, which shows who declined the entry.<br>If the owner cancels it, it is removed in Outlook. |
| | Outlook | CRM | Calendar entry is marked as *Cancelled* in CRM if it is deleted by its creator.<br>If an invitee of the entry deletes it from Outlook *after* the entry is synchronized to CRM, the entry shows the invitee status as *Assigned* in CRM.<br>If an invitee of the entry deletes it from Outlook *before* the entry is synchronized to CRM:<br>• An entry is created for the invitee in CRM.<br>• The creator sees the entry in CRM, with names of all invitees who accepted it and their acceptance status. Invitees who declined the entry appear with their assigned status. |

In the CRM system, calendar entries are types of tasks. This table lists the delivered PeopleSoft task types and for those that are supported in this integration, they are mapped to Outlook as calendar items:

| ***PeopleSoft Task Types*** | ***Outlook*** |
|---|---|
| Appointment | Calendar |
| Meeting | Calendar |
| Reminder | Not supported in this integration |
| All Day Event | Not supported in this integration |
| Phone Call | Not supported in this integration |
| To Do | Not supported in this integration |

---

**Note.** For calendar entries that are marked as all day events, they are synchronized into the CRM system as *meetings* with the start date and time set to 12:00 am of the meeting date and the end date and time 12:00 am of the following day.

---

### Calendar Entry Creation

In PeopleSoft CRM, users access the My Calendar component to add new calendar entries. When a synchronization session completes, users can see from their Outlook clients the calendar entries that were created from CRM between the synchronization that was just finished and the one prior to that. These entries are tagged with the *Peoplesoft* category, which is a hard-coded filter criterion used to identify data that is subject to synchronization if you set up the integration to synchronize calendar entries based on category.

In addition to calendar entries that they created, users also see on their calendars entries which they are invited to attend.

Exchange users can create calendar entries from their Outlook clients as well. Calendar entries are synchronized to CRM and appear on the calendars of their owners and invitees.

See Use of Category

### Calendar Entry Update

When owners of calendar entries modify information, such as date, time, subject and invitee list, in the CRM system, the same change is synchronized to Microsoft Exchange and reflected in the Outlook clients for users who are either the owners or the invitees of the entries.

Similarly, calendar entry updates made from Outlook by their organizers are available in CRM after synchronization.

---

**Note.** Invitees can make changes to calendar entries but the updates are not synchronized to the other system. An exception to this is when invitees decline the calendar invitation; this status change will be synchronized to the other system at the end of the process.

---

See Use of Category

### Calendar Entry Deletion

In PeopleSoft CRM, calendar entries cannot be removed from the system, rather, they can be cancelled by owners or declined by invitees. After synchronization completes, corresponding calendar entries are removed from the Exchange calendars of their owners and invitees.

Both owners and attendees can delete their calendar entries on Outlook. If an entry is deleted by the owner, it appears as cancelled in CRM; if it is deleted by an invitee, it still appears in CRM and the status of the invitee is set to *Assigned* (status is not synchronized).

### Field Mapping

This table lists the field mappings between PeopleSoft CRM and Outlook calendar entries:

| ***PeopleSoft*** | ***Outlook*** |
|---|---|
| Subject | Subject |

| ***PeopleSoft*** | ***Outlook*** |
|---|---|
| Status:<br>*Cancelled*<br>*Completed*<br>*In Progress*<br>*Open* | All replicated regardless of status. |
| Private | Private |
| Priority<br>*High*<br>*Medium*<br>*Low* | Priority<br>*High*<br>*High*<br>*Low* |
| Start Date | Start Date |
| Start Time | Start Time |
| Time Zone | Sets to current user's time zone by default |
| End Date | End Date |
| End Time | End Time |
| Location | Location |
| Owner (for Meeting)<br>Provider Group (for Appointment) | Value is used to validate the task ownership and is not replicated.<br>In the case of appointments, the members of the provider group are automatically populated as invitees. |
| Repeats | Recurrence |
| Reminder | Reminder |
| Description | Description |
| Invitee | Invitee |

### *Calendar Entries with Invitees/Attendees*

In PeopleSoft CRM, users can create meetings (a type of calendar entry supported in this integration) which include invitees. When a meeting is synchronized to Microsoft Exchange, it appears on the calendars of its owner (creator) and its invitees (if they are Exchange users). CRM meeting invitees must be CRM contacts and defined as PIM users but they do not have to be contacts of the meeting owner or contacts in Exchange. For invitees who are not Exchange contacts, they will not be created as Exchange contacts at the end of sychronization.

Similarly, users can create calendar entries that include attendees in Microsoft Exchange. When an Outlook meeting is synchronized to the CRM system, the first name, last name, full name and email address of each attendee are used to find a matching contact in the CRM system. This matching occurs only for the first time when the calendar item is created in both systems and they haven't been synchronized previously. Each identified attendee appears as an invitee of the synchronized calendar entry in CRM. For those that cannot be identified as PeopleSoft users or contacts, they are shown in the calendar entry as external invitees if each of them is associated with an email address.

### Invitee Status in Meetings

When an invitee accepts a meeting invitation, make sure that the acceptance is done in both systems manually or the calendar entry can go out-of-sync. This type of status change (acceptance of invitation) is not supported in the synchronization process.

As for declining a meeting invitation, the invitee only needs to do it in one system; this type of status update gets propagated to the other system at the end of synchronization. In other words, if you decline a meeting (or you're removed from a meeting as an invitee) in one PIM system, the meeting entry is removed from the other PIM system after synchronization completes.

### Meetings with non-PeopleSoft Owners

In Microsoft Outlook, users (who are not registered users in PeopleSoft, also referred to as external users) can create calendar entries with PeopleSoft users or contacts as attendees and these calendar entries can get synchronized to PeopleSoft CRM. These calendar entries are created as *appointments* in CRM, and the owners of these appointments, who are not PeopleSoft users, are displayed in the invitee lists as external users, with their owner position being replaced by invitees in the appointments who are valid PeopleSoft users. For information purposes, each of these appointments will have the email address of its non-PeopleSoft owner recorded as message detail.

Note that calendar entries of this nature can get out-of-sync as the changes that are made by the original owner (who is not a PeopleSoft user) are not synchronized to the other system because he or she is no longer the current owner of the entry, and the synchronization process only honors owner-initiated changes.

### Meetings with non-PeopleSoft Attendees

If Outlook calendar entries include attendees who are not PeopleSoft contacts or users, these individuals are synchronized to the CRM system as *external invitees* provided that they have email addresses associated with them.

### Recurring Calendar Entries

Both PeopleSoft CRM and Microsoft Exchange support the creation of recurring calendar entries, events that occur daily, weekly, monthly and yearly. Users can also specify the range of recurrence. Recurring entries created in one system are populated to the other system at the end of synchronization.

In PeopleSoft CRM, when you make and save a change (for example, description, location, or start date) on a recurring calendar entry, the system asks if the change is to be applied to the current instance or current plus all future instances of the series. If you select the latter option, all (not just current and future) instances of the series are updated in the Exchange system when synchronization completes.

### *PeopleSoft CRM Calendar Repeating Options*

The PeopleSoft CRM Calendar supports a number of repeating options for calendar entries on the Task Repeating Options page (RB_TSK_REPEAT_SEC), including daily, weekly, monthly, yearly and custom. This table lists the recommendations for setting up recurring calendar entries in CRM:

| *Repeating Type* | *Recommendation* |
|---|---|
| Custom - the ability to schedule a calendar entry to occur on specified dates | Not supported. Do not configure custom repeating options for calendar entries that are subject to synchronization. |
| Daily, Monthly and Yearly | If a calendar entry is set up to recur, use only the *Don't Move* value for the If Date Occurs on a Non-Work Day option. |
| Monthly and Yearly | Do no use the Count from End of Month option. |

**Note.** If you set up recurrence for a calendar entry in Outlook to not have an end date, the entry will be created in CRM to recur for six months.

### *Data Translation for Time Zones in Calendars*

PeopleSoft delivers 19 time zones in the system, whereas Java supports about 600 time zones. These two sets of time zones are delivered in PeopleSoft as codeset setup data. The codeset groups are *RBP_ECRM* (with 19 PeopleSoft-supported time zones) and *RBP_BDSS* (with 600 Java-supported time zones) and the mappings are predefined. If deemed necessary, modify the mappings to suit your business needs.

Refer to *PeopleTools 8.52: PeopleSoft Integration Broker PeopleBook*, Applying Filtering, Transformation and Translation, *Understanding Data Translation* for more information on codesets.

### *Data Translation for Contact Information*

PeopleSoft also delivers codeset groups to provide mappings of country, title and state values between systems. They are *PIM* and *INFOSYNC* and are referenced in the PSFT_PIM and PSFT_INFOSYNC nodes respectively for this integration.

## Use of Category

When PeopleSoft contacts and calendar entries are synchronized to Exchange successfully, they are displayed in Outlook with a *Peoplesoft* category. The category helps users to identify, for example, contacts that were brought to Outlook from PeopleSoft as opposed to the ones that were created in Outlook or any other PIM systems. Also, if a customer has multiple PIM systems interacting with BDSS and wishes to limit PeopleSoft contacts and calendar entries to the Exchange system only, they can set that up in BDSS using the *Peoplesoft* category.

Data filtering occurs in BDSS. Customers can configure BDSS to filter on the *Peoplesoft* category for the synchronization process.

**Important!** By default, *all calendar entries* are synchronized regardless of category. However, you can set up the filter capability that is in place to synchronize calendar data based on the category of *Peoplesoft.*

The BDSS profiles database has a setting called *EarliestCalendarDate* and it is used during the initial synchronization of calendar data from PeopleSoft to Exchange systems. The integration looks for and processes calendar entries that are created after this date. The default value of this setting is *January 01, 2011*.

When a user creates a contact or a calendar entry in CRM and it later gets synchronized to Exchange, it is displayed in the user's Outlook client along with the *Peoplesoft* category. In the case when the user creates a calendar entry in Outlook, and BDSS is set up to use filter, the user must tag the entry with the *Peoplesoft* category for it to be picked up by the synchronization process.

As for updates, contacts and calendar items are subject to synchronization (from Exchange to CRM) if they are in the *Peoplesoft* category and BDSS is set up to use filter.

## Conflict Resolution

A data conflict can arise if the same contact record (sharing the same first name, last name and email address) or the same calendar entry (sharing the same subject and start time) is shown to have been added *for the first time* in both CRM and Exchange servers in a single synchronization session. Data conflicts are handled by BDSS based on the priority that is set for each connector domain involved in the integration. In this integration, the Contact and Calendar domains of the PeopleSoft connector are configured with a higher priority than those of the Exchange connector. In other words, when a conflict occurs, the record of the PeopleSoft side always wins.

Suppose that you add a contact called *John Doe* in both CRM and Exchange systems and these newly created contacts are captured in the same synchronization process. This is considered a data conflict because of the matching first and last names in these new records. As a result, the contact record from CRM wins and is used for *John Doe* in the Exchange system. The conflict has no impact one the CRM system because new contacts from Exchange are not synchronized to CRM.

Here is another example. You add a contact called *John Doe* in the CRM system and a contact named *Johnny Doe* in the Exchange system. These new contacts are captured within the same synchronization process and John Doe from CRM is replicated to the Exchange system as a result. Later, you modify the contact name from *Johnny Doe* to *John Doe* in the Exchange system. In this case, these contacts are not considered in conflict even though they share the same first and last names, because they are not added to the system for the first time.

The system creates a log entry after a data conflict is resolved.

### *See Also*

Chapter 25, "Working with Exchange Integration," Reviewing Synchronization Logs, page 474

# Specifying PIM Users for Synchronization

This section discusses how to specify PeopleSoft users to be included in the sychronization process.

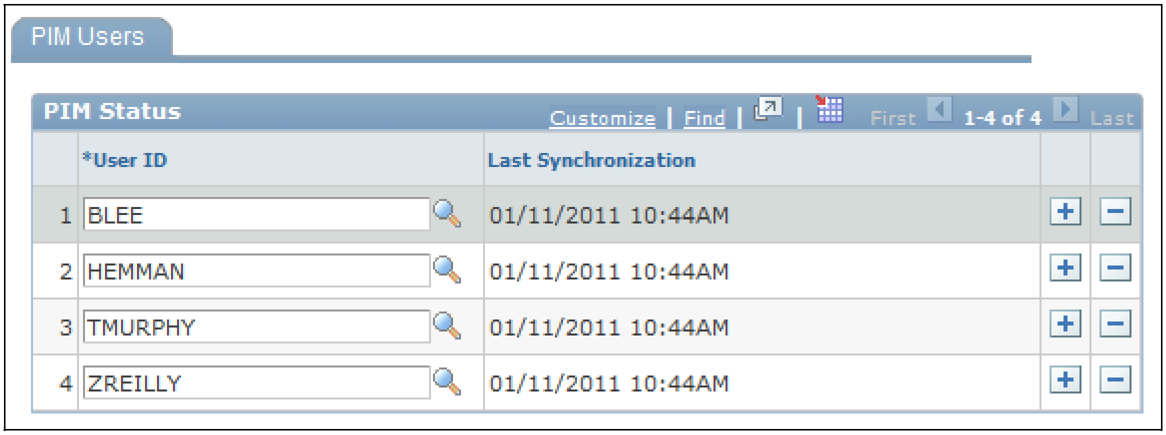
 

## Page Used to Specify PIM Users for Synchronization

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| PIM Users | RBP_USERS | Set Up CRM, Product Related, BDSS Integration, PIM Users | Specify PeopleSoft users to be included in the synchronization process. |

## Specifying PIM Users for Synchronization

Access the PIM Users page (Set Up CRM, Product Related, BDSS Integration, PIM Users).




PIM Users page

For users to be included in the synchronization process, they need to be created in BDSS before they are specified in the CRM system. Refer to the installation guide for instructions on how to create users for synchronization in BDSS.

| | |
|---|---|
| **User ID** | Select a PeopleSoft user whose contacts and calendar entries are to be synchronized between the CRM and Exchange systems. |
| **Last Synchronization** | Displays the date and time of when the last synchronization process took place. |

### *See Also*

*PeopleSoft Enterprise Customer Relationship Management 9.1 Personal Information Management Server Sync Installation Guide*, Setting Up Synchronization in BDSS and PeopleSoft CRM Creating Users for Synchronization in BDSS

# Reviewing Synchronization Logs

This section discusses how to review synchronization logs.

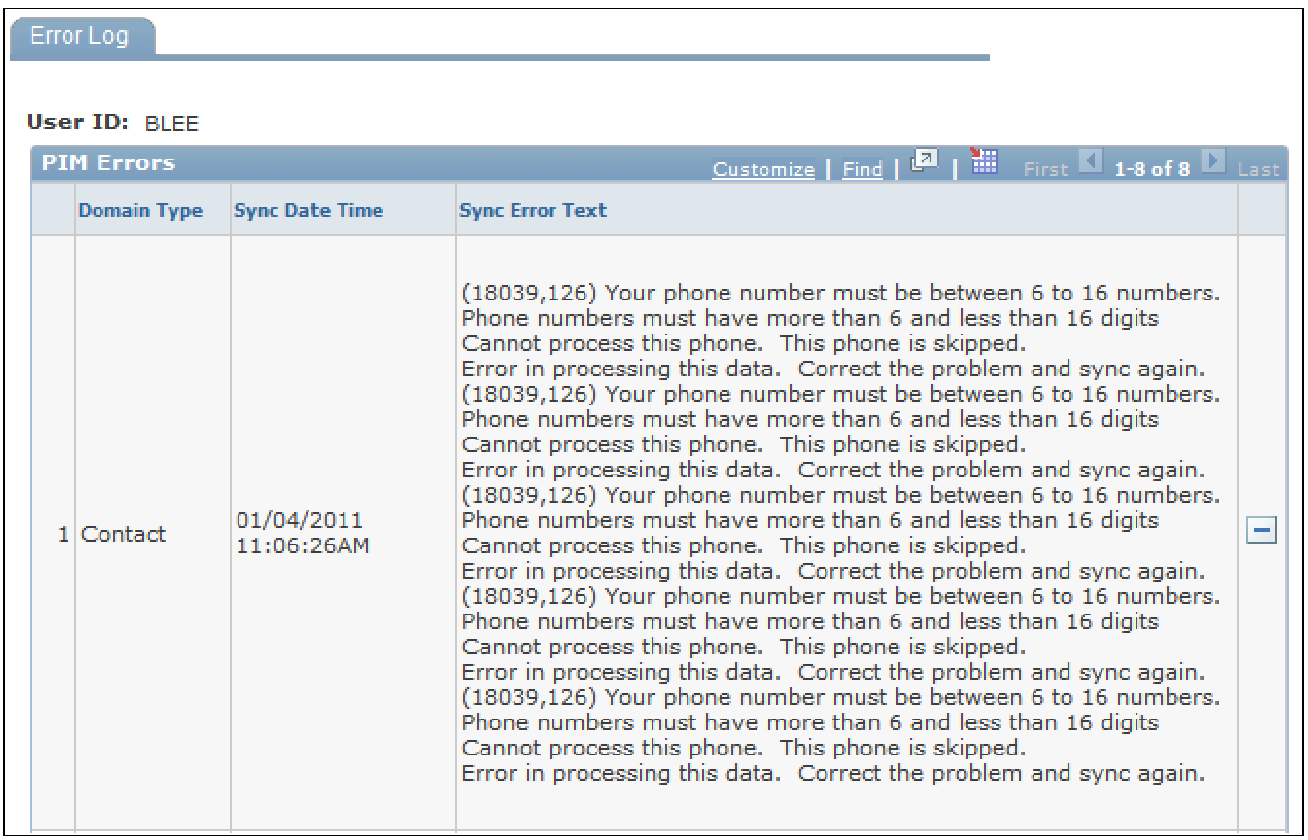
PeopleSoft CRM captures message logs as part of the Integration Broker logs. The logs include information such as each user's last synchronization date and time, data conflict results, synchronization results as well as any errors that occur during the process.

## Page Used to Review Synchronization Logs

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Error Log | RBP_ERROR_LOG | Set Up CRM, Product Related, BDSS Integration, Error Log | Review synchronization logs for users. |

## Reviewing Synchronization Logs

Access the Error Log page (Set Up CRM, Product Related, BDSS Integration, Error Log).




Error Log page

| | |
|---|---|
| **Domain Type** | Displays the domain *(Contact* or *Calendar)* that the synchronization error pertains to. |
| **Sync Date Time** | Displays the date and time of the synchronization. |
| **Sync Error Text** | Displays the synchronization message (retrieved from the BDSS Server) that provides details on the success or failure of the process. |
|  | Click to delete the message log. |

Part 7

# Entitlement Management

**Chapter 26**
**Setting Up and Managing Agreements and Warranties**

**Chapter 27**
**Defining Pricing Information for Services and Support Offerings**

**Chapter 28**
**Performing Entitlement Searches for Cases and Service Orders**

## Chapter 26

# Setting Up and Managing Agreements and Warranties

This chapter lists common elements, provides overviews of agreements and warranties, agreement pricing, how agreements and entitlements are used in PeopleSoft Order Capture, and discusses how to:

- Define service levels.
- Define entitlements.
- Define entitlement plans.
- Define agreement templates.
- Define agreements.
- Define warranties.
- Generate sales leads for agreement renewal.

## Understanding Agreements and Warranties

This section lists common elements and discusses:

- Agreements and warranties.
- Default agreements.

## Common Elements Used in This Chapter

**Scope**

Select the scope of the agreement. Values are:

*Site:* Indicates that the agreement applies to sites that are specified on the Scope Details page.

---

**Note.** For PeopleSoft Order Capture the system only allows *Site* as the scope for agreement templates when Available for Ordering is selected as an option.

---

*Contact:* Indicates that the agreement applies to named callers that are specified on the Scope Details page.

---

**Note.** Although agreements with a scope of *Contact* are not available for selection on service orders, you can select agreements of either *Site* or *Contact* as scope for cases.

If you create a case and associate it to an agreement (regardless of the scope) and then create a service order from that case, you must first select an agreement for the new service order; so the agreement from the case is not defaulted to the service order.

---

**Max. Contacts** (maximum contacts) or **Maximum Number of Contacts**

Enter the maximum number of named callers one can specify on the Scope Details page. This value is applicable to agreements with a scope of *Contact.*

**Provider Group** and **Group Member**

Select the default provider group and group member to perform the service request that is covered by this agreement. You can change these values on the service order.

**Renew Agreement**

Click to create a copy of the agreement that is about to expire. The CRM system sets the start date of the new agreement to the day after the end date of the old agreement and the new end date equal to the new start date plus the same number of days as the original agreement. You can establish new start and end dates for the renewed agreement and modify the information as necessary.

**Payment Terms**

Select when payment is due. Payment terms in PeopleSoft CRM are synchronized with the payment terms from PeopleSoft Financials.

| | |
|---|---|
| **Purchase Option** | Select the method of purchasing the service or support offering for an agreement transaction. The prompt displays the purchase options (for agreement transactions) that are defined for the selected service, product or service-product combination in its pricing record on the Pricing Information page. The options for an agreement pricing record are:<br>*Flat:* Indicates that the service or support offering is purchased for a flat fee.<br>*Prepaid:* Indicates that a specified number of work units of the service or support offering is purchased in advance.<br>**Note.** The *T&M* (time and material) purchase option only applies to agreement service or agreement case transactions, and on demand service or on demand case transactions; it is not applicable to agreement transactions. |

## Agreements and Warranties

In PeopleSoft CRM, *agreements* reflect service or support contracts. *Warranties* define the coverage that is offered for a particular item that is installed at a customer's site. Both warranties and agreements define the services or support that the customer is entitled to and the duration of the contract.

- Agreements:

  Agreements also define the price of services or support offerings that are covered by the agreement, and the price of the agreement itself.

  You may associate an agreement or agreement template with multiple products; however, if you have an integration to PeopleSoft Contracts that you activated on the Installation Options – Billing and Pricing Options page, you can only have one product per agreement or agreement template line. If you are not using the Contracts Integration feature, the save-edit check is disabled and you can enter multiple rows of data in the Product grid of the agreement line.

  You can define three types of agreements:

  - PeopleSoft Field Service

    In a field service agreement, you specify what products in which customer sites are entitled to the service that is selected in each agreement line. An agreement can have one or multiple agreement lines, each of which also contains pricing and entitlement information. Each site on an agreement is assigned a site identification number (SIN) to identify whether a service can be performed at a particular location.

  - PeopleSoft Support

    Support agreements reference products on agreement lines. Similar to field service agreements, support agreements define customer sites that are entitled to support offerings. Support agreements can also define which people can contact your call center agents for support. Each named caller that is listed on an agreement is assigned a personal identification number (PIN) to identify the person as a valid caller when that person calls for support. You can define a support agreement for sites or for named callers, but you cannot define an agreement that includes lines for both sites and named callers.

  - PeopleSoft HelpDesk

    Help desk agreements represent an agreed upon level of service that an organization provides to its employees. Service level agreements define the response and restore times that the help desk will try to meet while responding to requests for service from employees. In addition to response and restore times, help desk agreements can define employees, products, installed products, priorities, sources of contact (phone, email, fax, and so on), departments, locations, and roles. Help desk agreements give agents the ability to associate an agreement line to a help desk case. Help desk agreements search against employee, products, installed products, plus other criteria such as case priority. An agreement can have one or multiple agreement lines, each of which also contains products, entitlements, and the various components that apply to the entitlements (role, department, priority, and so on).

- Warranties:

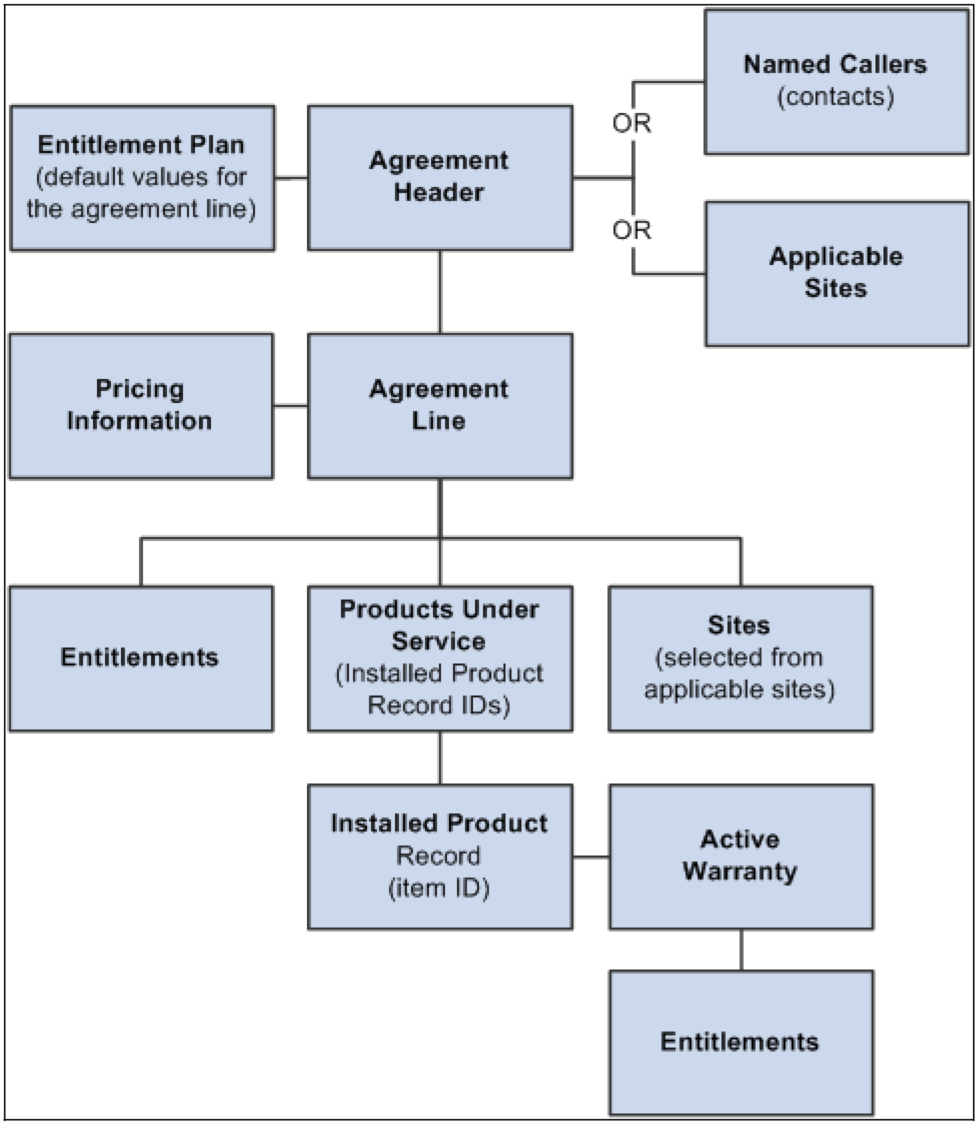
  You define the duration of the warranty and the entitlements that are owed to customers with covered products. You can associate warranties with items on the Item Definition page. For specific items that are installed at a customer's site, you can activate the warranty on the customer's installed product by using the Installed Product component.

  **Note.** Warranties are not listed for PeopleSoft HelpDesk agreement search results.

When searching for a customer's entitlements for a case or a service order that references an installed product, the CRM system matches agreements and warranties based on response time — either ascending or descending depending on setup option in Agreement Search Configuration page.

This diagram shows the data model for agreements and shows the relationship between agreements and warranties:




Agreement data model

***See Also***

Chapter 28, "Performing Entitlement Searches for Cases and Service Orders," page 557

## Default Agreements

PeopleSoft CRM enables you to create two types of default service level agreements:

- Non-customer specific agreements:

  These types of agreements do not have any specific customers associated with them. They apply to all customers. For example, assume you create an agreement for a specific customer called ABC Enterprises and then create another agreement that is non-customer specific. Both of these agreements would potentially apply to a case that is opened for ABC Enterprises.

  Only the non-customer agreement would apply to a case opened for another customer. The non-customer specific agreement may have agreement lines that specify a particular service or a service and product combination (for use in PeopleSoft Integrated FieldService). They may also specify lines for a particular product or list of products (for use in PeopleSoft Support) or specify levels of support that apply as default levels regardless of the service or product on the case.

  Because they apply to all services and all products, these lines would not have a specific service or product associated with them. A non-customer specific agreement cannot have pricing data associated with it, except you can write-in values of *free* for prepaid quantities.

  The user may enter a number in the Prepaid Quantity field and select a value (case, service order, or hour) in the Prepaid Unit field, both of which would define the number of free units (either cases, service orders, or hours) that are associated with that agreement. The idea is that the user gets a certain quota of free services automatically with the default agreement as represented in the Prepaid Quantity and Prepaid Units fields.

  You must define non-customer specific agreements with the agreement category of *External – No Pricing.*

- Customer-specific agreement.

  These agreements contain agreement lines with no product and no service and are only valid for agreements with the *External - No Pricing* agreement type. An agreement that lists a specific customer may also contain default lines with no service and no product. These agreements are meant to apply to all cases and service orders, regardless of the service or product value of the case or service order. This means that a default agreement line with associated service level entitlements can be associated for a particular high-value customer to cover all its cases, perhaps at a higher service level than provided for in a non-customer specific agreement default line. A default line on a customer-based agreement that has no product and no service cannot be priced.

  **Note.** Only customer-specific agreements are shown on the agreement section of the 360-Degree search page for a particular customer.

# Understanding Agreement Pricing

This section discusses:

- Pricing record retrieval.
- Line price calculations.
- Total price calculations.
- Price recalculations.
- Uncoupling service pricing from an agreement.

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**Note.** You can use PeopleSoft CRM to calculate agreement prices. In PeopleSoft Support, agents can accept payment by credit card at the time of the transaction regardless of whether an agreement is associated with the support case.

---

## Pricing Record Retrieval

The CRM system can retrieve five types of pricing records for the agreement line: agreement, agreement service, agreement case, on demand service, and on demand case.

Agreement pricing records define the fee that is paid for a specific service or support offering. The agreement price is paid when the agreement is issued to or signed by the customer. Agreement service pricing records define what the customer pays when the work that is associated with the service or support offering on the agreement is performed—that is, the price paid per transaction that is covered by a line item in the agreement. Likewise, agreement case pricing defines the amount payable by the customer for logging a case.

The CRM system only retrieves pricing records that are defined for the currency that is specified when you define the agreement. You cannot change the currency unless you clear the defined line pricing values.

For field service agreements, you define pricing records for a service or a service and product combination. When you create a line for a field service agreement, you can retrieve the price for the agreement. When you specify a prepaid purchase option, you must specify the prepaid quantity. The rate on the agreement pricing record that matches the criteria that you enter is used to calculate the base line price for the agreement line.

The rate for the agreement service pricing record that matches your criteria becomes the transaction price for work that is covered by the agreement line.

For support agreements, the functionality is similar. You can create agreement pricing and agreement case pricing records that define support rates for specific products. When you create a support agreement, the same logic (used in field service agreements) is also used in support agreement to retrieve base line price.

### *See Also*

Chapter 27, "Defining Pricing Information for Services and Support Offerings," page 549

## Line Price Calculations

This section describes line pricing calculations in detail.

### *Entitlement Adjustment*

The CRM system adjusts the base line price or prepaid rate that is retrieved from the pricing record to account for uplifts and discounts that are associated with the entitlements on the agreement line. The uplift and discount percentage values are totaled and applied to the base line price using this formula:

Entitlement Adjusted Base Line Price = Base Line Price *x* (1 + (sum of entitlement discount and uplift percentage values))

For example, the CRM system returns a base line price of 100 USD for an agreement line with three entitlements. The first entitlement has an uplift of 10 percent, the second an uplift of 15 percent, and the third a discount of 5 percent. The entitlement-adjusted base line price is calculated as:

Entitlement Adjusted Base Line Price = 100 USD *x* (1 + (0.1 + 0.15 - 0.05)) = 100 USD *x* 1.2 = 120 USD

### Installed Product Quantity

When the agreement purchase option is flat, the entitlement-adjusted price on the agreement line applies to each installed product that is covered by the agreement line. The applicable installed products are listed on the Agreement Line page. To determine the installed product quantity, the CRM system adds the values in the quantity field of each referenced installed product.

### Flat Purchase Pricing Calculation

To calculate the final line price on an agreement line that uses a flat purchase option, PeopleSoft CRM:

1. Calculates the base line price by adjusting the rate on the agreement pricing record for the number of installed products and agreement duration.

   For example, if the pricing record rate is $20 per year per installed product, the agreement line duration is two years, and there are three installed products, the base line price is $20 x 2 x 3 = $120.

2. Adjusts the base price for entitlement adjustments.

3. Applies any manual adjustments.

   Manual adjustments are either expressed as a percentage or as a dollar amount.

This formula is used:

Final Line Price (for flat rates) = Base Line Price x Entitlement Adjustment + Manual dollar amount adjustment or x Manual percentage adjustment

### Prepaid Purchase Pricing Calculation

To calculate the final line price on an agreement line that uses a prepaid purchase option, the CRM system calculates the entitlement adjustment for the line and applies it to the base line price. The prepaid rate does not vary with the duration of the agreement, so there is no need to adjust the base line price to account for agreement duration. The final line price is calculated as:

Final Line Price (for prepaid rates) = Prepaid Rate *x* Prepaid Quantity *x* Entitlement Adjustment

Any manual adjustments that exist for the line are also applied to the final line price.

## Total Price Calculations

The total price is calculated by adding the final line prices on the associated agreement lines. Additionally, a final uplift or discount percentages can be applied to the base price of the agreement. For example, if the CRM system calculates a base price of 2,000 USD for the agreement and you have entered a discount of 10 percent, the CRM system calculates a total price of 1,800 USD for the agreement.

## Price Recalculations

If you modify the entitlements on an agreement line, change the installed product quantity for an agreement line, or update the start and end dates of the agreement line after agreement line pricing has been calculated, the change you made is not automatically reflected in the final line price, though edit messages issued when the user saves a changed agreement will prompt the user to have the system update the price or leave the price unchanged.

In other words, if the values of the variables (for example, entitlement adjustment and agreement duration) that are used to calculate the current final line prices do not match the ones that are captured for the new calculation, the price of the agreement is no longer accurate. You can then recalculate the final price for the agreement lines as needed and update the total agreement price for the agreement.

## Uncoupling Service Pricing from an Agreement

PeopleSoft CRM enables you to uncouple service pricing from an agreement for PeopleSoft Support and PeopleSoft Integrated FieldService. This enables you to define prepaid agreement with zero pricing, without having to set up service pricing first.

In addition to the *External* and *Internal* agreement categories, there is an agreement category called *External – No Pricing.* This category enables you to set up prepaid agreements without pricing. To create a flat zero dollar agreement, you can use either the *External* or *External – No Pricing* agreement category.

PeopleSoft CRM, however, recommends using the *External – No Pricing* agreement category, as the system bypasses the pricing logic and does not display a pricing warning message. This enables you to create an unlimited number of cases or service orders. To create a prepaid agreement with no pricing, use the *External – No Pricing* category. The system hides the Order Capture Created check box in the agreement header, but you can still define prepaid purchase options.

By having the Prepaid Quantity field on the agreement header level, it enables you to have a pool of prepaid quantities per agreement across agreement lines. The system displays the prepaid fields only when the category is *External – No Pricing.*

Once a prepaid agreement is active and used on a case or service order, changing the prepaid quantity will not do anything. The system sets the Prepaid section to read only after the agreement has been used by the case or service order, when the remaining quantity is less than the prepaid quantity. When the agreement is renewed, the system uses the same prepaid quantity, remaining quantity, and prepaid total as the old line.

The Product grid displays the prepaid purchase option defined for each product. The prepaid option at the agreement header level and the Product grid level cannot coexist, however. You need to either define the total pool of prepaid purchase options for the whole agreement or the prepaid purchase options per product.

In addition, you can define the prepaid option on the line level for service-related agreements. For service-related agreements, the prepaid option can only be specified on the agreement header, line level, or product level. For support-related agreements, you can only specify the prepaid option on the agreement header or the product level. The prepaid option on the line level doesn't apply to support-related agreements, it only applies to service-related agreements.

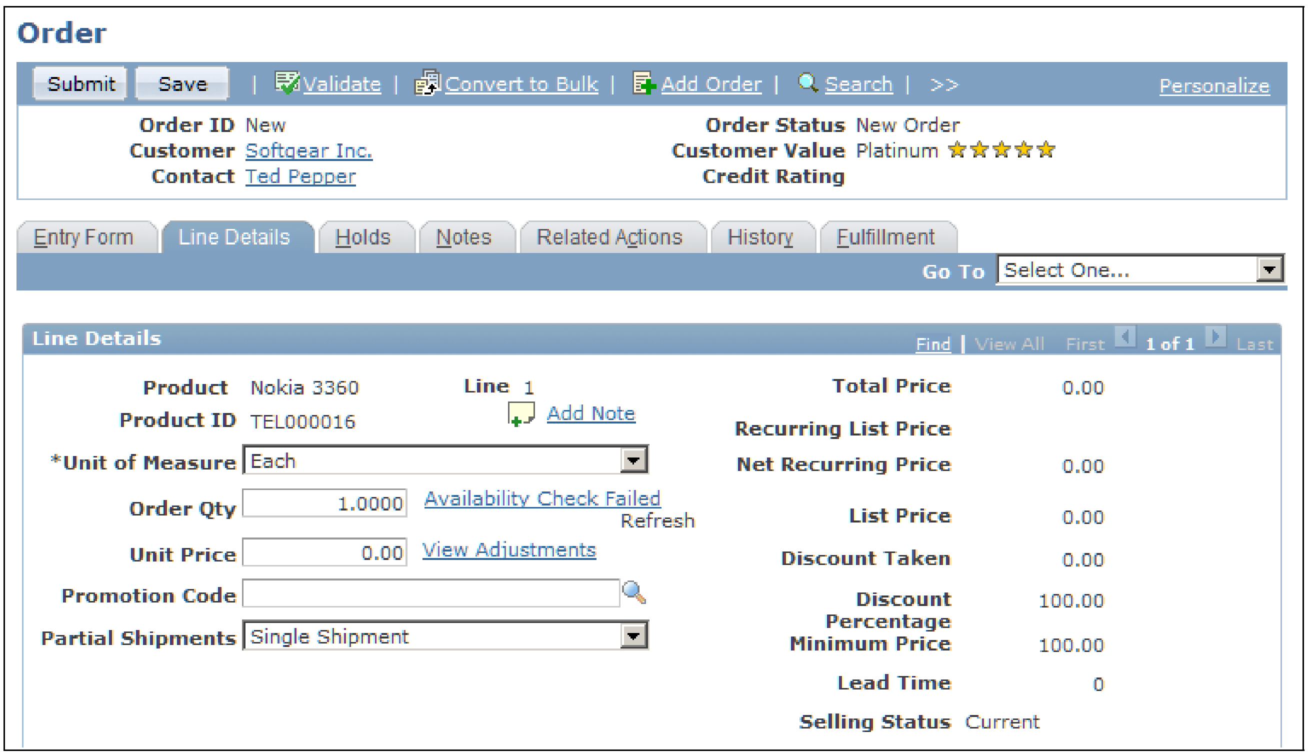
# Understanding Ordering and Service Management of Agreements

PeopleSoft Order Capture and Order Capture Self Service support the ordering of service agreements. Like any standard product or package, a service agreement can be added directly to an order by a customer service representative (CSR). Or, it can be added as a cross-sell or up-sell opportunity of an existing product in the order—a way to boost company sales.

### *Cross-sell of Agreements in Orders*

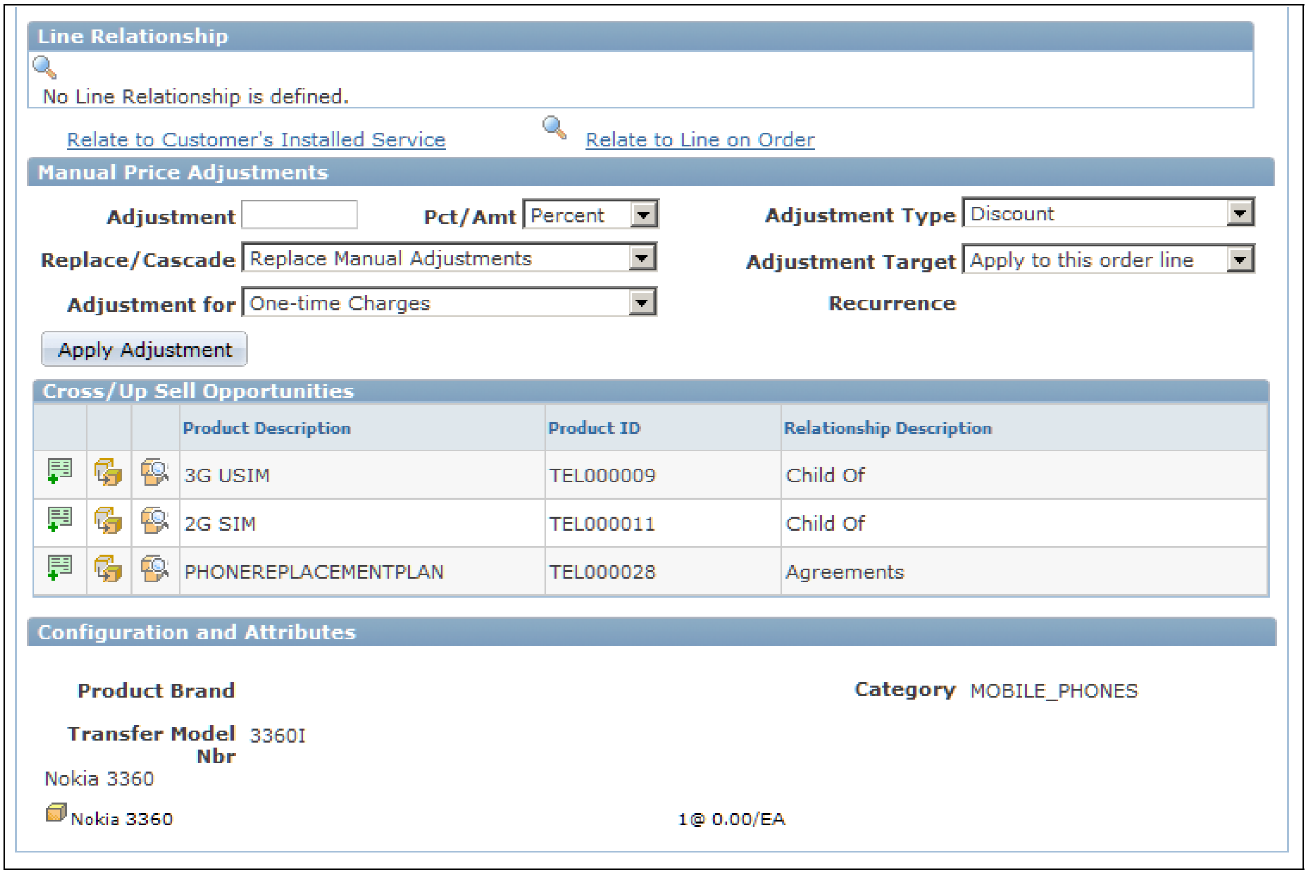
The CRM product model provides the framework for establishing relationships between products and service agreements, which is the an important step for setting up cross-sell or up-sell offerings. You can associate a service agreement with one or more products using the Product Relationships component. When one of these products is added to an order, its associated service agreement appears on the order as well as a cross-sell or up-sell opportunity.

This screenshot shows an order of a phone product (Nokia 3360), and this phone product is associated with a service agreement (PHONEREPLACEMENTPLAN) as displayed on the Cross/Up Sell Opportunities section:




Order of a phone product with an associated service agreement (1 of 2)




Order of a phone product with an associated service agreement (2 of 2)

PeopleSoft provides the ability to associate a product with a service agreement, associate multiple products with the same service agreement, and drive the up-sell offering of agreements when purchasing other products.

---

**Note.** If an agreement template is set to be available for ordering, a corresponding product definition will be created automatically for ordering purposes when the template is saved.

---

For agreement templates that are available for ordering, or if the integration to PeopleSoft Contracts is enabled in your system, you can only specify one product and one service in each agreement template line. If an agreement template contains multiple lines with services that are applicable to the same product (for example, phone line repair service and phone line maintenance service for product ID 12000, and you order the service agreement product that was created for that agreement template, you're purchasing all services that are available to the product in the template.

### *Pricing of Agreements in Orders*

Pricing of a service agreement product is dynamic in that it depends upon which products are being covered on the order by the agreement. A CSR can add additional customer-purchased products to be covered by the agreement product by referencing the customer's installed products to the agreement product order line. This functionality is not extended to self-service users.

**Note.** The Order Capture applications limit the purchase of one agreement per standard product ordered. For example, if a customer orders a computer and the computer is covered by two agreements on the order, the computer can only be covered by one or the other agreement, but not both.

### *Calculation of Agreement Duration in Orders*

When a service agreement is added to an order, the system computes its duration automatically and it is not available for edit. Based on the choice that the CSR makes to whether create a new agreement (leave the *NEXT* value in the Agreement Code field) or use an existing agreement (specify an agreement ID in the Agreement Code field) in the order line for service agreement, the start and end dates are calculated differently:

- New agreements:

  When ordering a service agreement, the system defaults the start date to the current date. The agreement template referred to by the order will have a duration. This duration is used in conjunction with the agreement start date on the order to calculate the new agreement's end date.

- Existing agreements:

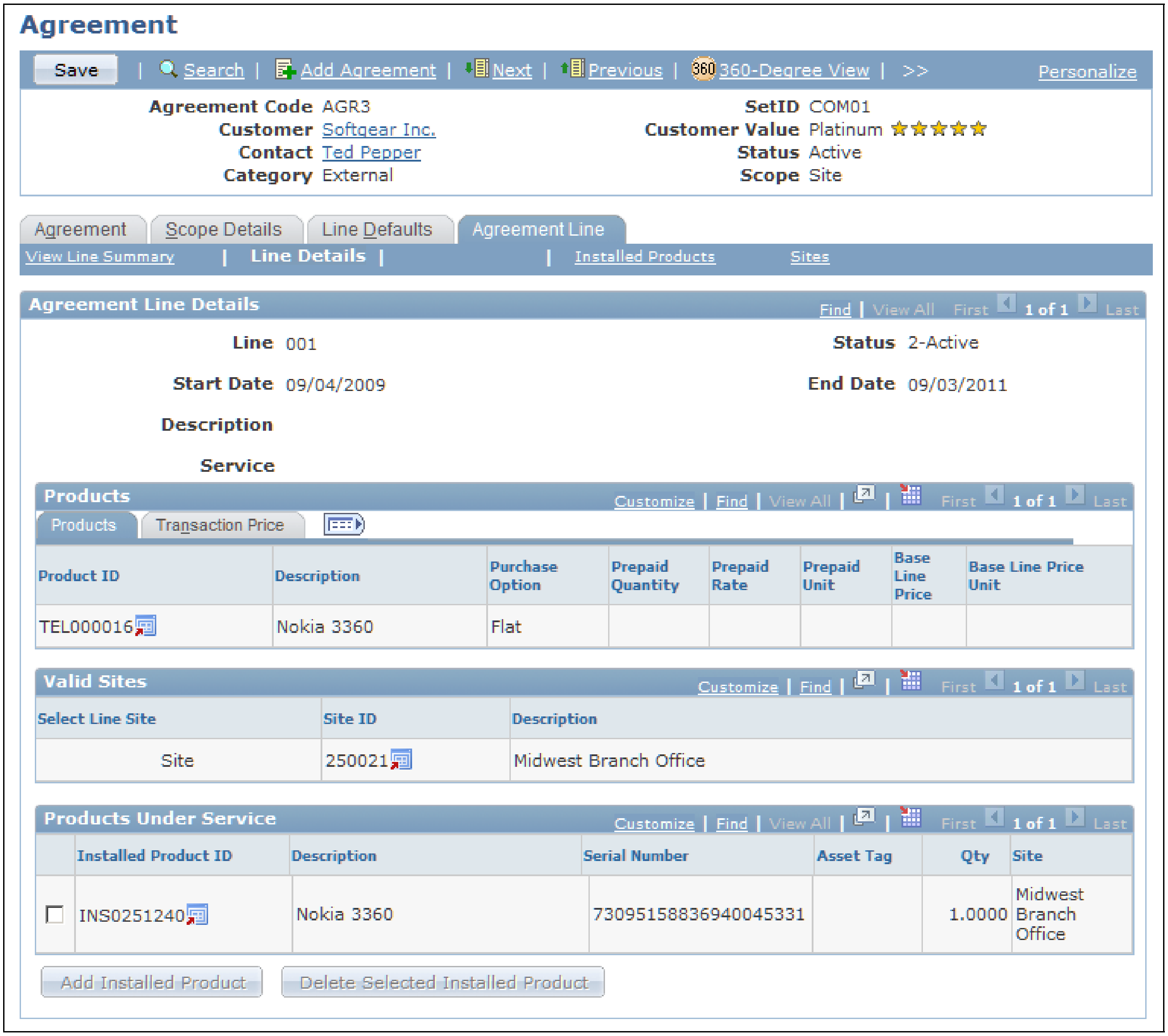
  The system fills in the end date with the end date of the existing agreement and use the current date as the start date.

### *Agreement Entitlements*

After an order has been submitted and the corresponding business process or business project completed, a new agreement is created for the service agreement product. This new agreement inherits several default values from the agreement template that is associated with the service agreement product, such as duration and entitlements.

This screenshot shows an agreement that is created after the completion of the business project, which was triggered upon order submission:




Creation of an agreement after the ordering of a service product agreement is completed

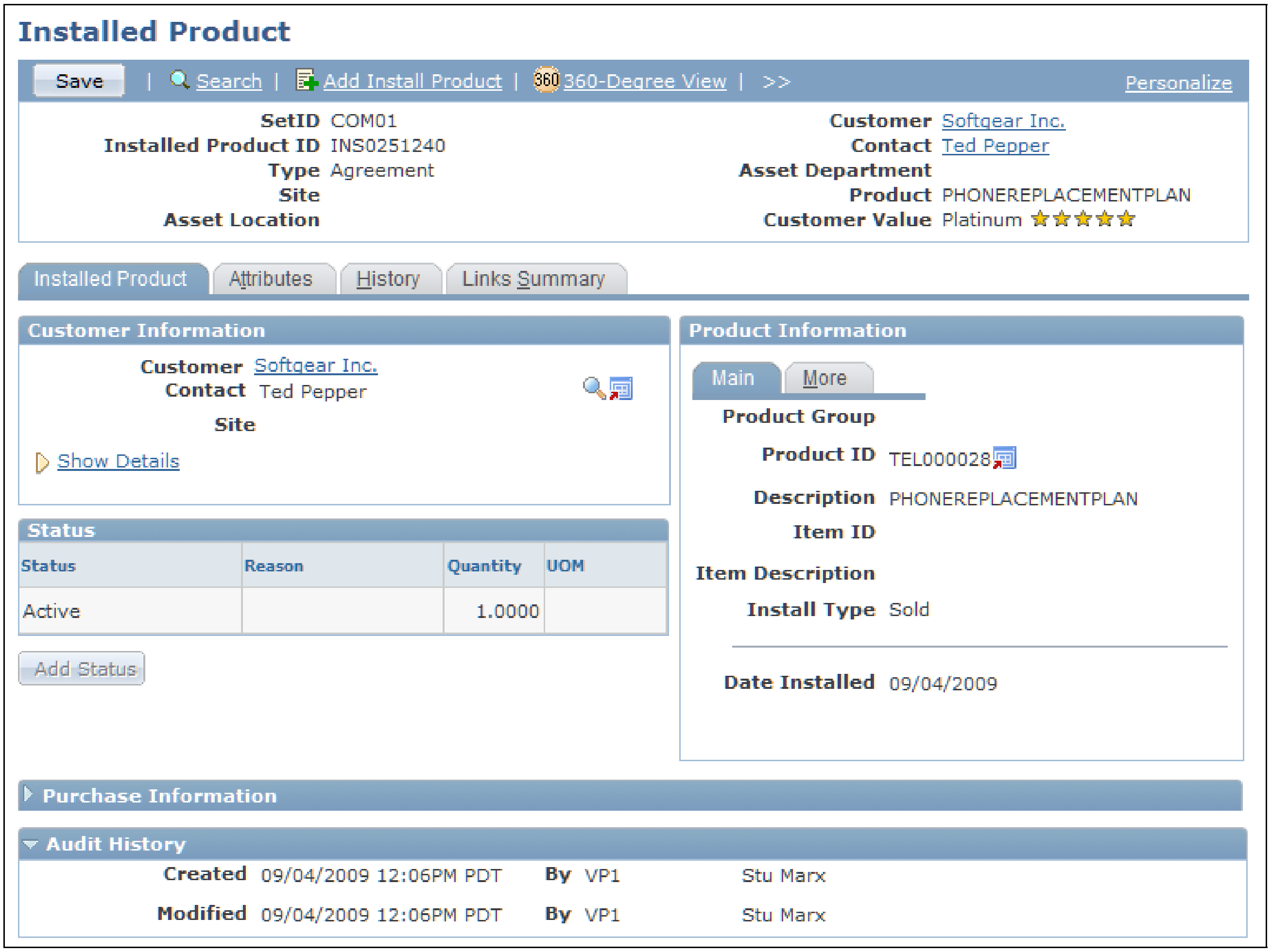
For agreement templates that are available for ordering, the default entitlement set (specified on the Line Defaults page) is used in all template lines and is not modifiable at the line level. For templates that are not orderable, entitlements can be updated on a line-by-line basis if necessary. The same is true for agreements. For those that are generated based on orderable agreement templates, the same set of entitlement is used as the default in each agreement for its lines. Whereas in agreements that are based on non-orderable templates, entitlements can be modified at the agreement line level.

### *Service Management of Agreements*

One of the tasks of the business process or business project that runs after the submission of an order is to create a new installed product for the service agreement being purchased. The installed product (of type *Agreement*) can be used to perform any agreement-related service requests, including renewing, cancelling, suspending and resuming agreements, using the Service Management component.

This screenshot shows an installed agreement that is created after the completion of the business project, which was triggered upon order submission:

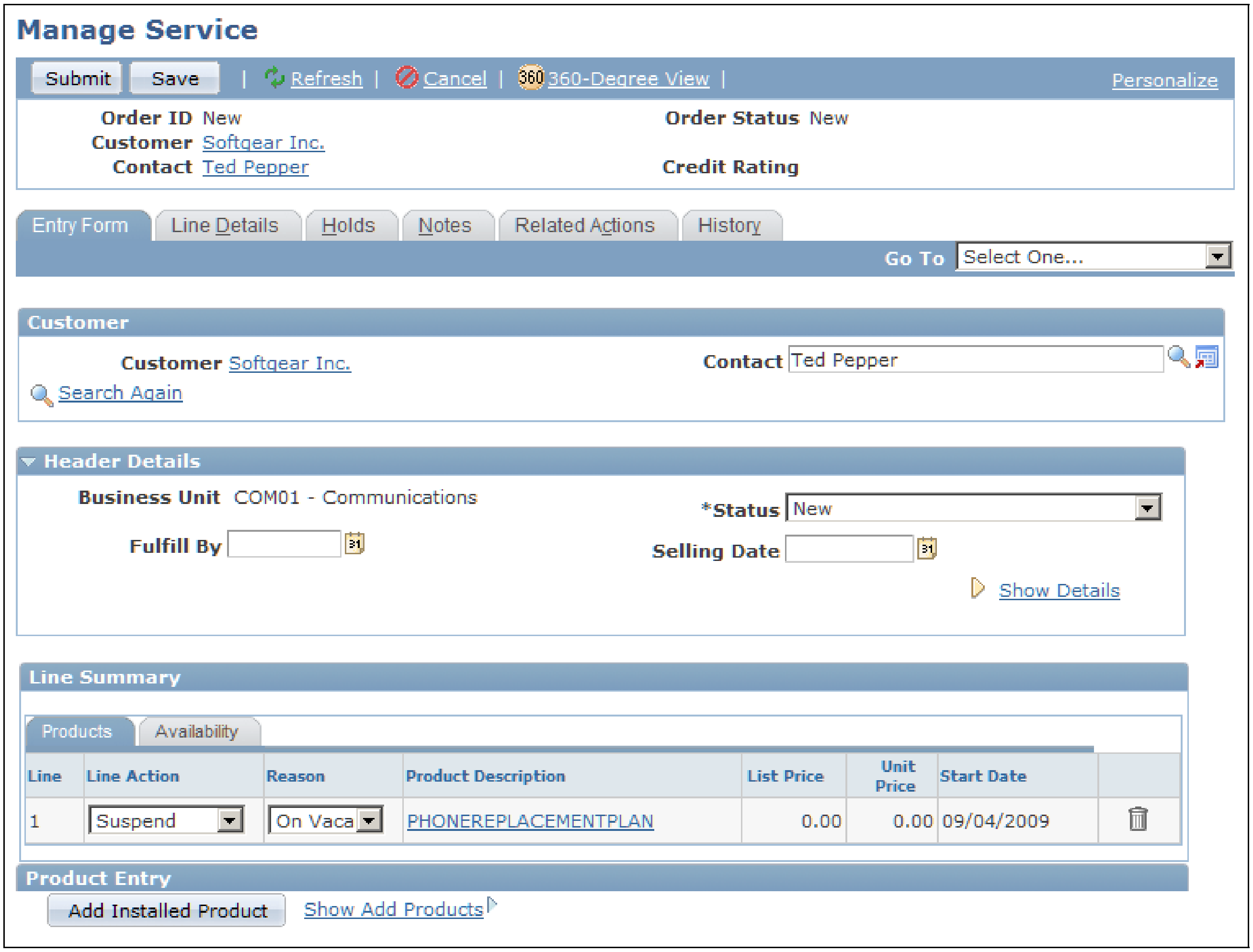
 




Creation of an installed agreement that is created after the ordering of a service product agreement is completed

This screenshot shows a service management order that is created for an installed agreement:




Creation of a service request for an installed agreement

Supported actions include *suspend*,*suspend/resume*,*cancel* and *renew*.

See and *PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Tracking Installed Products," Understanding Installed Products. and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working with PeopleSoft Service Management," Understanding Service Management.

## Defining Service Levels

This section provides an overview of service levels and service level suspensions and discusses how to:

- Define service levels.
- Create additional cost categories for the service level.

## Understanding Service Levels

You can define the hours of operation or prime period of maintenance for the services that your organization offers. For example, you may provide some services only during a 40-hour work week, whereas other services may be provided 24 hours a day.

You can define entitlements for specific service levels, which can then be included on a customer's agreement. When an agreement line with service level entitlements is selected for a case or service order, the system displays the calculated response and restore time.

---

**Note.** In general, you can define service levels for each time zone that is covered by your organization. PeopleSoft, however, strongly recommends that you not reset the base time zone in PeopleTools after your system is running and your applications are in production. Resetting the base time zone can cause time reports to be incorrect.

If you reset the base time zone (go to PeopleTools, Utilities, Administration, PeopleTools Options), your users will need to recreate all time-frame related data and update each record to reset the correct time frame for the new base time zone. Users can change the time zone for a particular agreement if they want to display time differently. If users continuously change time zones, however, the system will lose track of what the base time zone is at the time the record is saved (since all time-zone related fields on PeopleTools are stored against the base time zone).

---

## Pages Used to Define Service Levels

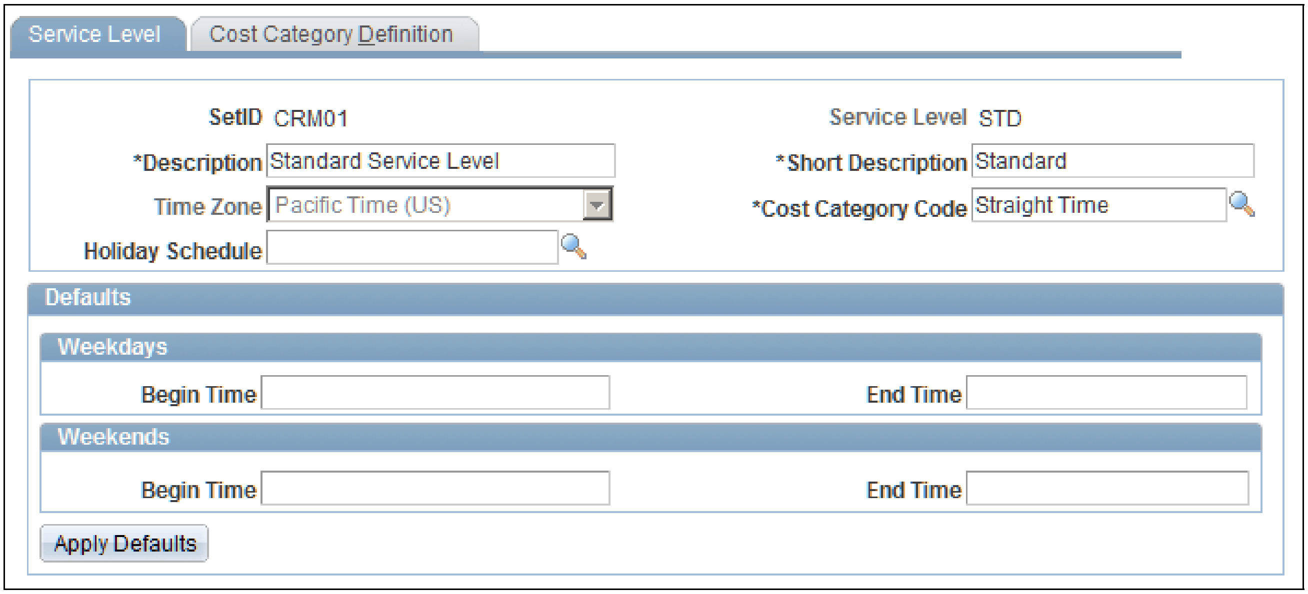
| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Service Level | RF_SERVICE_LEVEL | Set Up CRM, Common Definitions, Entitlements, Service Level, Service Level | Define the authorized hours of operations or prime period of maintenance. These service levels are informational only. |
| Cost Category Definition | RF_SLVL_COSTCAT | Set Up CRM, Common Definitions, Entitlements, Service Level, Cost Category Definition | Create additional cost categories for the service level. |

## Defining Service Levels

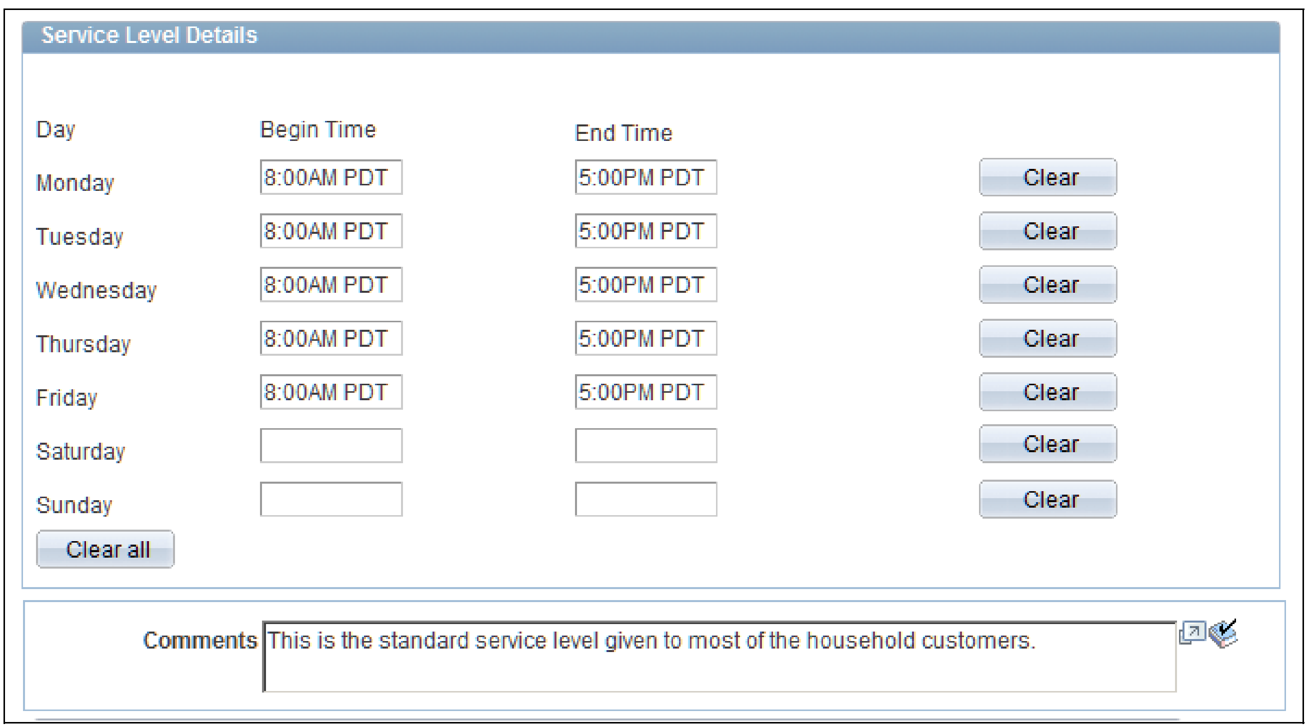
To define service levels, use the Service Level (RF_SERVICE_LEVEL) component.

Access the Service Level page (Set Up CRM, Common Definitions, Entitlements, Service Level, Service Level).




Service Level page (1 of 2)




Service Level page (2 of 2)

**Service Level** — Displays the name of the service level that you entered when the service level record was created.

**Description** and **Short Description** — Enter a long and short description. Because these descriptions are displayed in entitlements in which the service level is referenced, enter a meaningful service level description.

**Time Zone**

Select the appropriate time zone for the authorized hours of operations that you define for the service level. The CRM system populates the time zone code that you select next to the time values that you enter in the Defaults and Service Level Details group boxes. After you save the service level record, the time zone for the service level cannot be changed.

**Cost Category Code**

Select the cost category code that should apply for work performed during the days and times specified on this page.

**Holiday Schedule**

Select the holiday schedule that you want to apply to the service level. The system takes holidays into account when calculating required start and end dates for scheduled work.

By default, the system places the holiday schedule after the Entitlement grid on the Agreement Line page. Users can override it or clear it out. For platinum customers you can override holiday schedules by clearing them out on agreement lines.

The holiday schedule is based on specific dates, so each year you need to modify your existing holiday schedules with new dates or create new ones to re-prompt from the service level and agreement lines. PeopleSoft CRM recommends that administrator update existing dates, especially when re-prompts may affect a large number of agreement lines.

### *Defaults*

Enter the begin and end times for the weekdays and weekend days that you want the system to use for the service level. When you click the Apply Defaults button, the system enters the hours in the appropriate fields displayed in the Service Level Details group box.

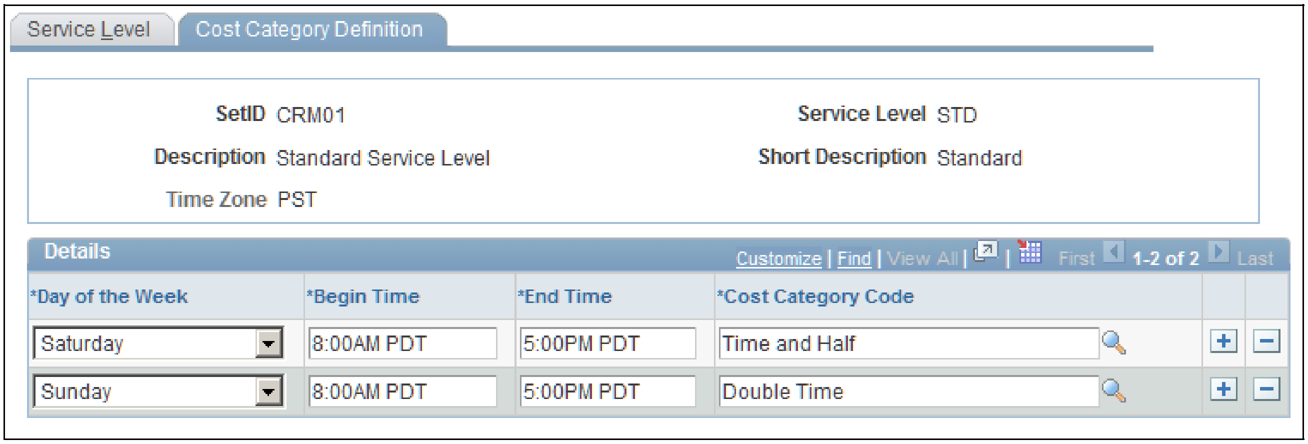
### *Service Level Details*

This group box displays the begin and end times for the days of the week associated with the service level. You may change the hours displayed in the fields or clear them all by clicking the Clear button.

## Create Additional Cost Categories for the Service Level

Access the Cost Category Definition page (Set Up CRM, Common Definitions, Entitlements, Service Level, Cost Category Definition).




Cost Category Definition page

If you charge different rates for the hours and days worked that were not defined on the Service Level page, use the fields on this page to define additional days, hours and cost categories.

For example, if you charge time-and-a-half for work performed on Saturday, select *Saturday* from the Day of the Week field, enter the hours in the Start Time and End Time fields, and then the select *HALF* as the cost category.

# Defining Entitlements

This section provides an overview of entitlements and discusses how to define entitlements.

## Understanding Entitlements

You define an entitlement record for every response time, restore time, coverage type, or service level that your company intends to offer on customer agreements or warranties. By using the Agreement component, you select the entitlement records that describe what the customer is contractually owed for the service or support offering on each line of the customer's agreement.

Similarly, when defining warranties with the Warranty component, you select the entitlements that are contractually owed to customers who have an installed product that is covered by a valid warranty.

Each entitlement record can specify an uplift or discount to adjust the base price of agreement lines that include the entitlement. When the CRM system calculates the final line price of the agreement line, it adjusts the base line price to reflect the sum of the uplift and discount values that are associated with the entitlements on the line.

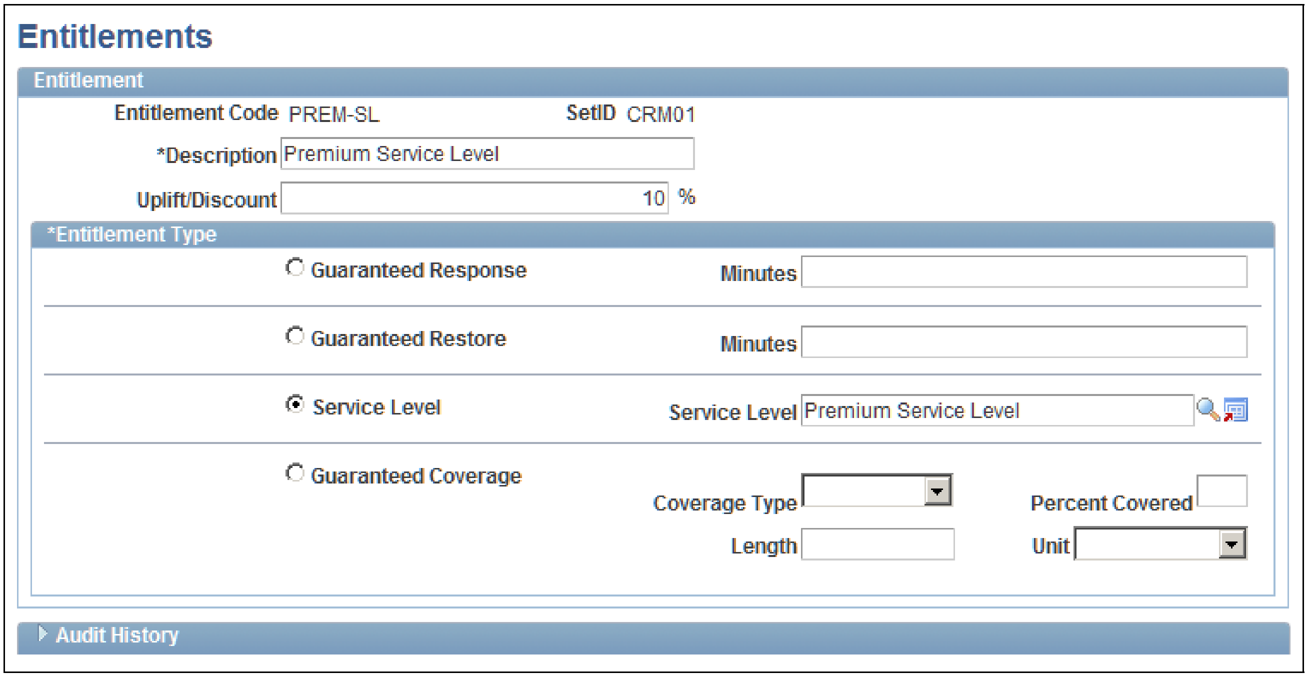
## Page Used to Define Entitlements

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Entitlements | RF_ENTITLEMENTS | Set Up CRM, Common Definitions, Entitlements, Entitlements, Entitlements | Define entitlements that can be offered on agreements and warranties. |

## Defining Entitlements

To define entitlements, use the Entitlements (RF_ENTITLEMENTS) component.

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




Entitlements page

**Description**

Enter a description. You can use up to 30 alphanumeric characters.

**Important!** Entitlement descriptions are displayed at the time of service order and case entry. Enter descriptions that are meaningful to the person who enters the service order or case. Typically, the entitlement description describes the response time, restore time, coverage, or service level that is contractually owed to the customer per the specified agreement line or warranty. For example, you may want to include the time zone of a service level in its description.

**Uplift/Discount**

Enter the percentage of uplift or discount to add to the price of agreement lines that include this entitlement. Enter discounts with a minus sign that precedes the amount; enter uplifts without a minus or plus sign.

### *Entitlement Type*

Specify the category of entitlement that is defined by the entitlement code together with the entitlement details that are associated with the selected category.

**Guaranteed Response** and **Minutes**

Select to entitle the customer to a response within the specified number of minutes. PeopleSoft Integrated FieldService uses the guaranteed response time to calculate the start date and time for service orders, if the automatic calculation feature is enabled at the business unit level. If the feature is disabled, agents can manually determine the customer preferred start date and time for service orders based on this information.

Call center cases also display and use the guaranteed response time from an associated agreement line entitlement.

**Guaranteed Restore** and **Minutes**

Select to entitle the customer to restored functionality of the product within the specified number of minutes. PeopleSoft Integrated FieldService uses the guaranteed restore time to calculate the committed end date and time for service orders, if the automatic calculation feature is enabled at the business unit level. If the feature is disabled, agents can manually determine the customer preferred end date and time for service orders based on this information.

The service order can have several types of begin and end times. The guaranteed restore entitlement is used to calculate the committed end date and time. Other end times include *customer preferred,* which are optional fields that are manually entered if the customer has a preferred date and time for service, such as a weekend. There are also *planned* end dates and times, which refer to the expected completion of each activity within a service order that are based on service begin type and activity duration.

Call center cases also display and use the guaranteed restore time from an associated agreement line entitlement.

**Service Level**

Select to entitle the customer to a specific service level or prime period of maintenance. Service levels are established on the Service Level page. PeopleSoft Integrated FieldService uses the service level that is specified in the entitlement to calculate the start and end dates and times for service orders, if the automatic calculation feature is enabled at the business unit level.

Service levels from an associated agreement line entitlement (in conjunction with guaranteed response or restore minute entitlements) are also used to calculate specific response and restore times for a call center case.

**Guaranteed Coverage**

Select to entitle the customer to a percentage of a specific type of coverage for a specific amount of time. When defining an entitlement for guaranteed coverage, select a coverage type, define the percent covered, and specify a time frame by entering a numeric value in the Length field and defining an appropriate unit, either *Day, Week, Month,* or *Year*.

**Coverage Type**

Select a coverage type if you select *Guaranteed Coverage* as the entitlement type. Values are:

*Expenses:* The portion (specified in the Percent Covered field) of any expenses that are associated with completing the customer's service order that is not charged to the customer.

*Material:* The portion (specified in the Percent Covered field) of the cost of any materials that are required to complete the customer's service order that is not charged to the customer.

*Time:* The portion (specified in the Percent Covered field) of the cost of any labor required to complete the customer's service order or case that is not charged to the customer.

### *See Also*

Chapter 26, "Setting Up and Managing Agreements and Warranties," Defining Service Levels, page 493

*PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Creating and Managing Service Orders," Setting Up Automatic Calculation of Dates and Times for Service Orders

# Defining Entitlement Plans

This section provides an overview of entitlement plans and discusses how to define entitlement plans.

## Understanding Entitlement Plans

Use entitlement plans as default values on agreements or warranties. You can reference a relevant entitlement plan to quickly populate an agreement or warranty with the entitlements that are associated with the plan. You can then delete or add other entitlements as necessary.

## Page Used to Define Entitlement Plans

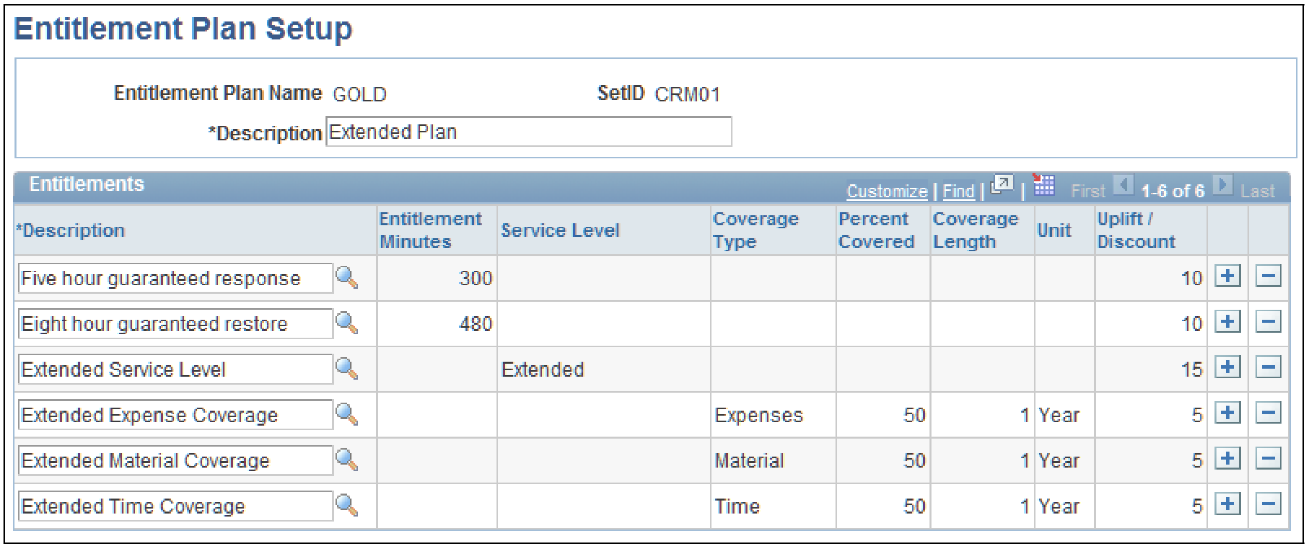
| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Entitlement Plan Setup | RF_ENTITLE_PLAN | Set Up CRM, Common Definitions, Entitlements, Entitlement Plan, Entitlement Plan Setup | Define groups of entitlements that can be referenced and populated quickly on agreements and warranties. |

## Defining Entitlement Plans

To define entitlement plans, use the Entitlement Plan Setup (RF_ENTITLE_PLAN) component.

Access the Entitlement Plan Setup page (Set Up CRM, Common Definitions, Entitlements, Entitlement Plan, Entitlement Plan Setup).



Entitlement Plan Setup

Entitlement Plan Name GOLD SetID CRM01

*Description Extended Plan

Entitlements Customize | Find | First 1-6 of 6 Last

| *Description | Entitlement Minutes | Service Level | Coverage Type | Percent Covered | Coverage Length | Unit | Uplift / Discount |
|---|---|---|---|---|---|---|---|
| Five hour guaranteed response | 300 | | | | | | 10 |
| Eight hour guaranteed restore | 480 | | | | | | 10 |
| Extended Service Level | | Extended | | | | | 15 |
| Extended Expense Coverage | | | Expenses | 50 | 1 | Year | 5 |
| Extended Material Coverage | | | Material | 50 | 1 | Year | 5 |
| Extended Time Coverage | | | Time | 50 | 1 | Year | 5 |

Entitlement Plan Setup page

You can create new or update existing entitlement plans by adding or removing entitlement entries from the plan. When you reference an entitlement plan on an agreement, the system automatically populates the plan's associated entitlement entries to the agreement.

The system, however, does not retroactively update individual entitlements on existing agreement lines or warranties when the corresponding entitlement plan used to create those entries is updated.

For example, if an agreement line was created with an entitlement plan which originally had a response entitlement of *A* and a restore entitlement of *B*, and that plan is subsequently changed to refer to a restore entitlement of *C* rather than *B*, the existing agreement line will still have the original two entitlement values.

Entitlement Plans are only used to default individual entitlements onto other new objects, such as agreement lines or warranties. These individual entitlements may then be modified by the user at any time, and are no longer determined or reset by any changes to the corresponding entitlement plan.

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**Note.** An entitlement plan must have at least one entitlement associated with it.

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### *See Also*

Chapter 26, "Setting Up and Managing Agreements and Warranties," Defining Entitlements, page 497

# Configuring the CRM System for Agreement Searches

This section provides an overview on agreement searches and discusses how to configure agreement searches.

## Understanding Agreement Searches

The Agreement Search Configuration page enables you to configure how the agreement search should function for PeopleSoft Support cases (external case agreement search), PeopleSoft HelpDesk cases (internal case agreement search) and PeopleSoft Integrated FieldService service orders (service order agreement search).

For external and internal agreements, there are separate group boxes for cases and service orders that enable you to instruct the system on how to search for agreements using these options:

- Autoselect the shortest response time from all matches.
- Autoselect the longest response time from all matches.
- Enable the user to choose from all matches.
- Match using case criteria.

If you select Match Using Case Criteria for external agreements (PeopleSoft Support), the system enables you to select case category, case priority, case source, case type, and customer value as the values for the Category field.

If you select Match Using Case Criteria for internal agreements (PeopleSoft HelpDesk), the system enables you to select department, location, priority, role, and source (inbound contact method) as the values for the Category field.

If you do not select the Match Using Case Criteria check box, the system performs the matching based on the radio button you selected. This means that if any agreement lines exist that specify values (criteria), the agreement matching engine ignores those values when selecting matches.

If you select the Match Using Case Criteria check box, the pool of agreement line matches will include any matches based on the criteria in the case and the corresponding criteria on the agreement lines. If two or more lines tie for the shortest or longest response, the system displays all agreement lines to the user.

To be considered a match, the criteria from a case may match any of the criteria conditions listed on the agreement line. For example, if an internal agreement line specifies that it is for high priority cases and the role is supervisor, the system matches the case with this line if the employee's role is supervisor, regardless of whether the case priority is high or not.

If a product is specified on the case, the system matches only agreement lines that have the product and at least one criteria. The system will also match default agreement lines that have no products that match on at least one criteria (if any criteria are present on the agreement line).

The system then filters the pool of agreement lines (and warranties) that are found under this option for presentation to the user according to the radio button option that was selected on the Agreement Search Configuration page.

 

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**Note.** Because PeopleSoft CRM no longer bases search results on the category weight factor, customers upgrading from a previous release may find that the agreement searching functionality for PeopleSoft HelpDesk may produce slightly different results. Also, now that the system sorts the total list of warranty and agreement line matches by response time, warranty matches do not always appear first in the list of results.

---

You can use a variety of agreements and agreement line values to set up your PeopleSoft CRM system. These tables summarize the main options that are available:

| ***External Agreement Line Characteristics*** | ***Comments*** |
|---|---|
| • No Product<br>• No Service<br>• No Installed Product<br>• No Criteria | This default agreement line will always apply regardless of the product or installed product that is linked to the case or service order. This line cannot be priced. It is permitted only for the External - No Pricing agreement category. |
| • Product = 123<br>• No Service<br>• No Installed Product<br>• No Criteria | This agreement line applies to any case for product 123, regardless of the installed product value on the case. |
| • Service = ABC<br>• No Product<br>• No Installed Product<br>• No Criteria | This agreement line applies to any service order, assuming that a service has not been selected on the service order. If a service has already been selected on the service order, this agreement line will only be a match if the service is the same in both places.<br><br>**Note.** The Service ID from a service order will be included as part of the matching criteria when selecting entitlements from the service order. |
| • Product = 123<br>• Installed<br>• Products = 456, 789<br>• No Service<br>• No Criteria | This agreement line applies to any case with matching product and installed product values. |
| • Product = 123<br>• No Service<br>• No Installed Product<br>• Priority = Medium<br>• Customer Value = Silver | This agreement line applies to any case for the product (regardless of the installed product) where the case priority is medium or the customer value is silver. |

| ***External Agreement Line Characteristics*** | ***Comments*** |
|---|---|
| • Product = 123<br>• No Service<br>• Installed Products = 456, 789<br>• Priority = High<br>• Customer Value = Gold | This agreement line applies to any case that is linked to product 123 and installed product 456 or 789, where the case priority is high or the customer value is gold. |
| • No Product<br>• No Installed Product<br>• No Service<br>• Priority = High | This agreement line applies, regardless of whether the product or the installed product is linked to the case, as long as the case priority is high. This line cannot be priced. |
| • Product = 123<br>• Service = Repair Widget<br>• No Installed Product<br>• No Criteria | This agreement line applies to any service order for product 123, regardless of the installed product, assuming that the service has not been selected on the service order, or has already been selected as *Repair Widget.* |
| • Product = 123<br>• Service = Repair Widget<br>• Installed Product 456, 789<br>• No Criteria | This agreement line applies to any service order for product 123 and installed product 456 or 789, assuming that the service has not been selected on the service order, or has already been selected as *Repair Widget.* |

**Note.** Customer, PIN, Person, SIN and Site Matching also apply for customer-based agreements in addition to comments in the table above.

| ***Internal Agreement Line Characteristics*** | ***Comments*** |
|---|---|
| • No Product<br>• No Installed Asset<br>• No Criteria | This default agreement line applies, regardless of the product or installed asset that is linked to the case. |
| • Product = 123<br>• No Installed Asset<br>• No Criteria | This agreement line applies to any case for the product, regardless of the installed asset value on the case. |

| *Internal Agreement Line Characteristics* | *Comments* |
|---|---|
| • Product = 123<br>• Installed Assets = 456, 789<br>• No Criteria | This agreement line applies to any case that matches the product and installed asset values. |
| • Product = 123<br>• No Installed Asset<br>• Priority = Medium<br>• Source = Phone | This agreement line applies to any case that is linked to the product (regardless of installed asset), where the case priority is medium or the source is phone. |
| • Product = 123<br>• Installed Assets = 456, 789<br>• Priority = High<br>• Department = HR | This agreement line applies to any case that is linked to product 123 and installed asset 456 or 789, where the case priority is high or the department is HR. |
| • No Product<br>• No Installed Asset<br>• Priority = High | This agreement line applies, regardless of the product or installed product that is linked to the case, as long as the case priority is high. |

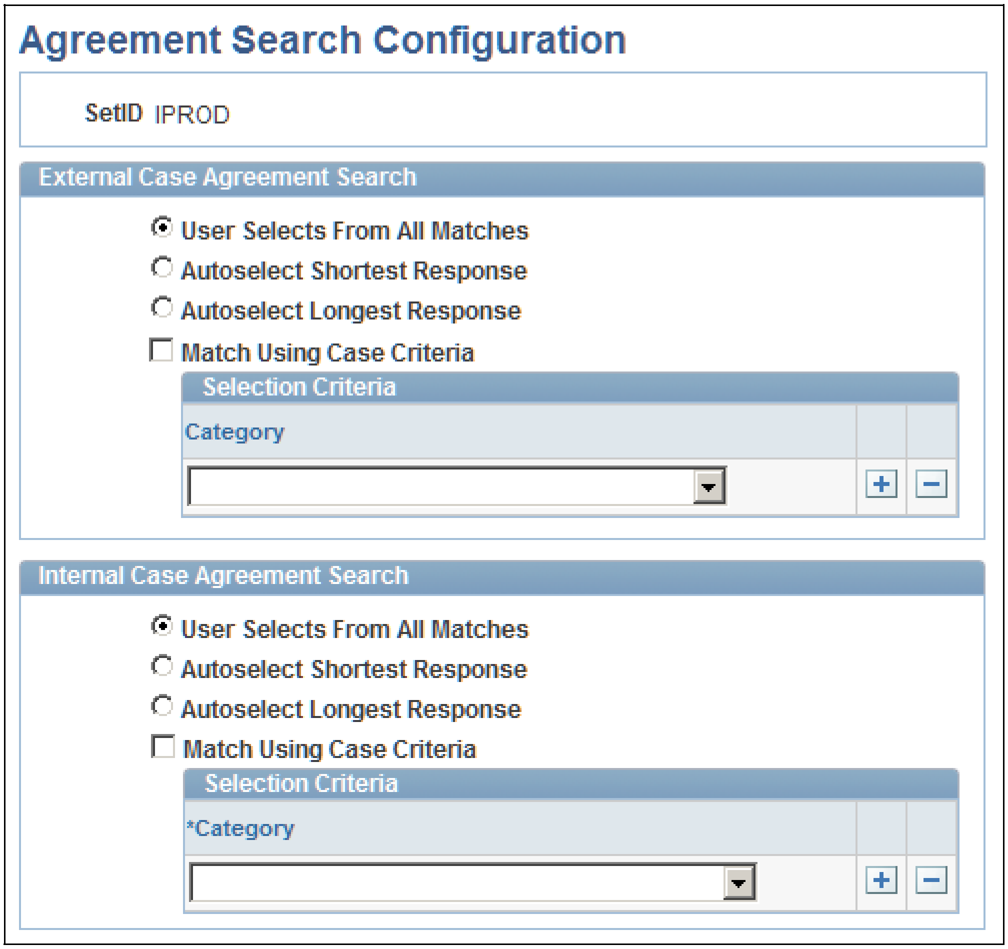
## Page Used to Configure Agreement Searches

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Agreement Search Configuration | RF_AG_SRCH_CFG | Set Up CRM, Common Definitions, Agreement Search Configuration, Agreement Search Configuration | Define how the system will search for agreements. |

## Configuring Agreement Searches

Access the Agreement Search Configuration page (Set Up CRM, Common Definitions, Agreement Search Configuration, Agreement Search Configuration).




Agreement Search Configuration page (1 of 2)


Agreement Search Configuration page (2 of 2)

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**Note.** The group boxes that appear on this page are dependent on which PeopleSoft applications you have installed. For example, the External Case Agreement Search group box appears only if you have PeopleSoft Support installed. The Internal Case Agreement Search group box appears only if you have PeopleSoft HelpDesk installed. The Service Order Agreement Search group box appears only if you have PeopleSoft Integrated FieldService installed.

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### *External Case Agreement Search*

Select one of the options listed to indicate how you want the system to search for agreements when a user selects the Select Agreement or Warranty link on the Case page in PeopleSoft Support.

The values include:

- User Selects From All Matches

  The system displays all matches in the pool of agreements or warranties.

- Autoselect Shortest Response

  The system displays only the matches from the pool of agreements or warranties with the shortest response.

- Autoselect Longest Response

  The system displays only the matches from the pool of agreements or warranties with the longest response.

---

**Note.** If you select either the Autoselect Shortest Response or Autoselect Longest Response agreement search option for cases (or service orders), and an AAF policy is defined and enabled in the CRM system to return a list of applicable agreements when products are selected on that type of cases (or service orders) for the same setID, the agreement search option takes precedence over what is defined in the corresponding AAF policy. In this example, the system returns the agreement with either the shortest or longest response time when a product is selected in an opened case (service order).

---

| | |
|---|---|
| **Match Using Case Criteria** and **Category** | If you do not select the Match Using Case Criteria check box, the system performs the agreement search based on the radio button that you select.<br><br>If you select the Match Using Case Criteria check box, the system includes agreement lines that match the criteria that you select in the Category field and the radio button that you select.<br><br>For example, if case priority and customer value are listed on the Agreement Search Configuration page, and the agreement line specifies it is for *high* priority cases, or cases whose customer value is *platinum,* the system still matches a high priority case to this agreement line regardless of customer value. The case criteria on an agreement line don't all have to match the values on a case to be considered a match. It is sufficient for just one criteria to match.<br><br>If a product is specified on the case, the system matches only agreement lines that match the product and at least one criteria.<br><br>The system matches agreement lines to the case for default agreement lines that have no products but match on at least one criteria, if any criteria are present on the agreement line. |

### *Internal Case Agreement Search*

Select one of the options listed to indicate how you want the system to search for agreements when a user selects the Select Agreement or Warranty link from the Case page in PeopleSoft HelpDesk.

The system returns all applicable default lines even when there is another match based on product or installed product. PeopleSoft designed the system to do this to give agents the option of selecting an agreement based on a completely different set of criteria.

For example, if you have one agreement line that covers a pocket PC and another default line to cover the role of CEO that does not have a product specified but has a better response time, the system displays both lines. This gives the agent the ability to select either line.

If you select the Match Using Case Criteria check box, you must select one or more categories that you want the system to use in its search. Refer to the previous section for a fuller explanation on using the Match Using Case Criteria and Category fields.

#### *Service Order Agreement Search*

Select one of the options listed to indicate how you want the system to search for agreements when a user selects the Select Agreement or Warranty link from the Service Order page in PeopleSoft Integrated FieldService.

# Defining Agreement Templates

To define agreement templates, use the Agreement Template (RF_AGREETEMP) component.

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

- Define basic header and billing information for agreement templates.
- Define default entitlement sets.
- Define default agreement lines.
- View and access linked product definitions.

## Understanding Agreement Templates

You can define model agreements for specific types of customers, products, or services. When you define an agreement for a specific customer by using the Agreement component, you can reference an agreement template to populate the basic agreement information and then make modifications as necessary.

**Note.** You can create templates with specific values for certain agreement criteria. However, if you create more than one agreement from the same template, you should change at least some of the criteria that you copied from the template; otherwise, you would have two identical agreements in your system.

## Pages Used to Define Agreement Templates

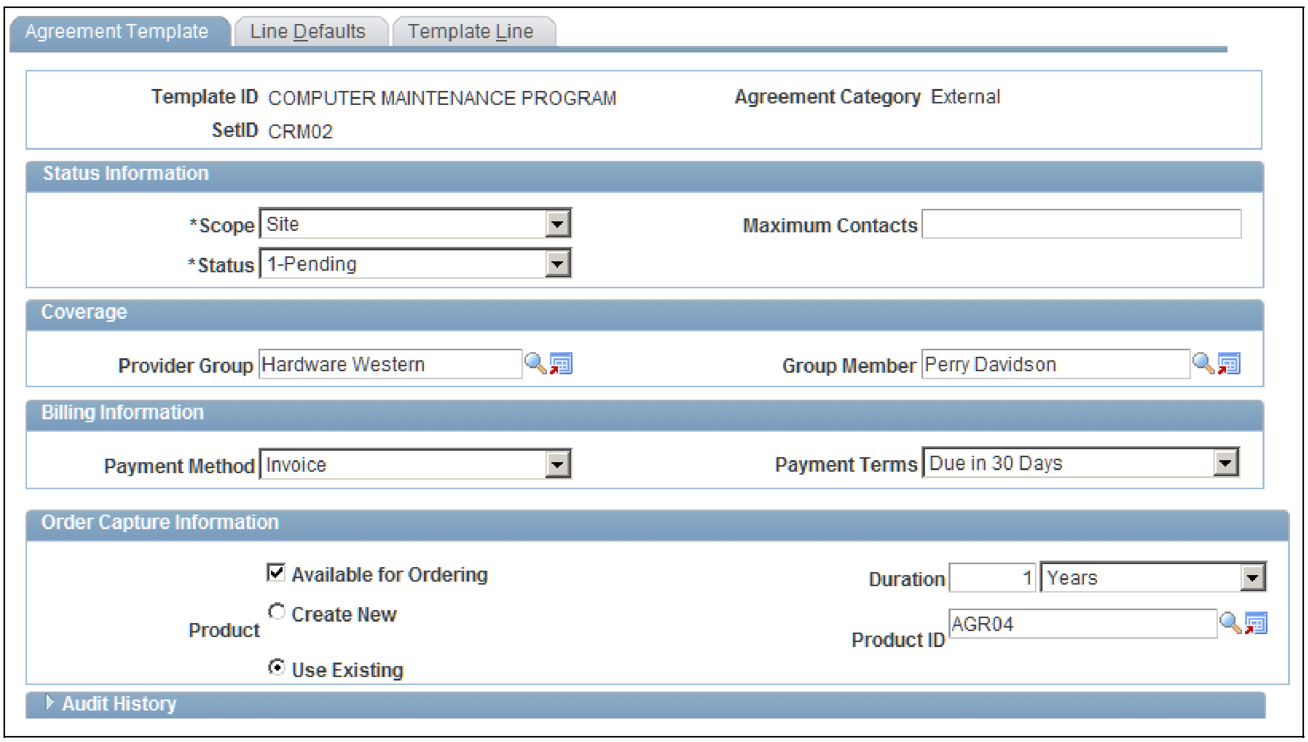
| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Agreement Template | RF_AGREETEMP_HDR | Customer Contracts CRM, Agreements, Agreement Templates, Agreement Template | Define basic header and billing information for agreement templates. |
| Line Defaults | RF_AGREETEMP_ENTL | Customer Contracts CRM, Agreements, Agreement Templates, Line Defaults | Define a set of entitlements to use as default values for the entries that are added on the Template Line page. |

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Template Line | RF_AGREETEMP_LINE | Customer Contracts CRM, Agreements, Agreement Templates, Template Line | Define default agreement lines. |
| Related Products | RF_AGREETEMP_PROD | Customer Contracts CRM, Agreements, Agreement Templates, Related Products | View and access linked product definitions.<br><br>**Note.** The Related Products page appears only if the template is being used with PeopleSoft Order Capture |

## Defining Basic Header and Billing Information for Agreement Templates

Access the Agreement Template page (Customer Contracts CRM, Agreements, Agreement Templates, Agreement Template).




Agreement Template page

**Agreement Category**

This field is required on the Add page when you are adding a new agreement. For agreements used in PeopleSoft HelpDesk, you must select *Internal* as the agreement category.

For agreements used in PeopleSoft Support and PeopleSoft Integrated FieldService, select *External* or *External - No Pricing* as the agreement category.

---

**Note.** If you select *External* - *No Pricing* as the agreement category, the system only displays the Status Information and Coverage sections.

---

### *Internal Agreement Type*

This group box appears only if you select the *Internal* agreement type. Select one or both of the HR Help Desk or IT Help Desk check boxes to designate the types of cases to which the agreement applies.

### *Status Information*

Use the fields appearing in this group box to select the scope and status for the agreement template you are defining.

---

**Note.** If you are defining an agreement template for PeopleSoft HelpDesk and you selected *Internal* as the agreement category, only the Status field appears on this page.

---

**Scope**

Select either *Site* or *Contact* to indicate the scope of the agreement template. If you select *Contact,* enter the number of contacts in the Maximum Contacts field.

---

**Note.** When Available for Ordering is selected as an option in the Order Capture group box, the system only allows *Site* as the scope for agreement templates. This is because PeopleSoft Integrated FieldService only uses *Site* as the scope for this type of agreement for service orders. PeopleSoft call center applications can use either *Contact* or *Site* as the scope.

---

**Status**

Select the status of the agreement: *Pending, Active,* or *Closed.* There are no system processes that change the status value of the agreement template, but you can manually change the status as necessary. You can only use templates with a status of *Active* to create a new agreement.

### *Coverage*

Select the provider group and provider group member that you want the system to use for the agreement template.

### *Billing Information*

Select the payment terms and payment method that you want the system to use for billing for agreements using the agreement template.

### *Order Capture Information*

**Available for Ordering**

Select to indicate if the agreement template may be sold through PeopleSoft Order Capture. If this option is selected, the scope of the agreement template must be *Site.*

**Duration**

Enter the duration for the agreement template.

Since start and end dates cannot be added to the template and the start and end dates are one of the attributes used to price an agreement line, the system uses the Duration field to calculate start and end dates. As such, agreements created from the template will have their own start and end dates.

The system uses the current system date to set the agreement line start date (or the override start date on the order). The system adds the duration to the start date to calculate the end date.

**Product** and **Product ID**

Select *Create New* if you want the system to create a new product from the agreement template to represent that template. The system creates a new product ID value when you save the new template. The system sets the description of the product to the template ID. It also sets the service flag on the product to Y for Yes. This enables the agreement to be selected (referenced by product ID) on an Order Capture order.

Select *Use Existing* to select a product from the Product ID field.

**Note.** If autonumbering is turned off, the system returns an error message when you attempt to save the template.

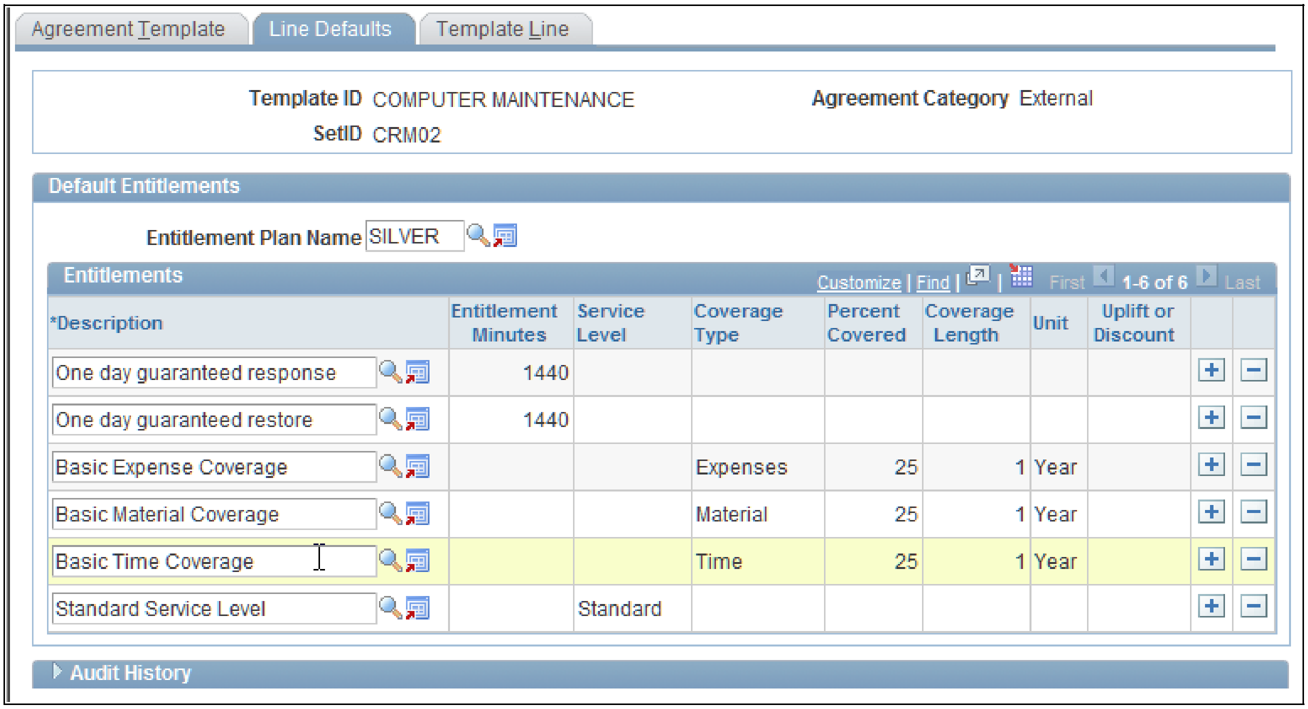
### *See Also*

Chapter 28, "Performing Entitlement Searches for Cases and Service Orders," page 557

## Defining Default Entitlement Sets

Access the Entitlement Defaults page (Customer Contracts CRM, Agreements, Agreement Templates, Line Defaults).




Line Defaults page

**Entitlement Plan Name**

Select a default entitlement plan. Plans are established on the Entitlement Plan Setup page. The system displays the entitlements in the plan. You can add or delete entitlements to create a specific list for this template.

The PeopleSoft CRM system displays the information that is associated with each entitlement as defined on the Entitlements page.

---

**Note.** Setting up plans is optional. You can add individual entitlements directly to the grid. The individual entitlements listed on this page will be defaulted onto each new agreement template line entry that is created from that template.

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### *See Also*

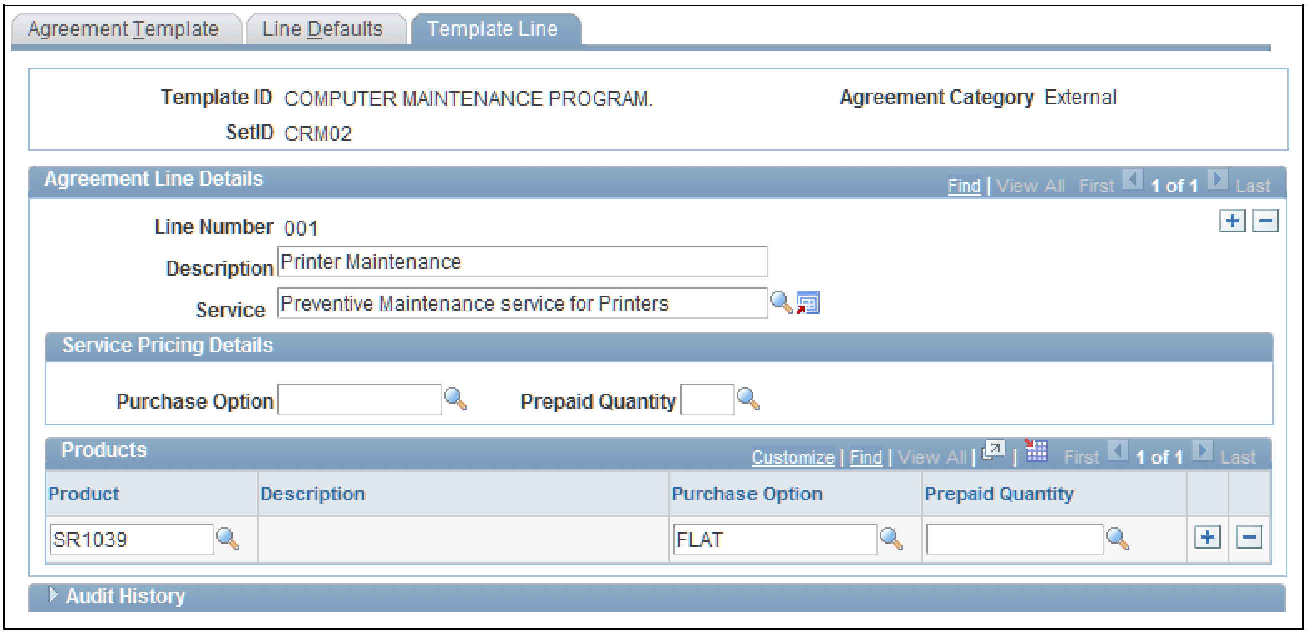
Chapter 26, "Setting Up and Managing Agreements and Warranties," Defining Entitlements, page 497

Chapter 26, "Setting Up and Managing Agreements and Warranties," Defining Entitlement Plans, page 500

## Defining Default Agreement Lines

Access the Template Line page (Customer Contracts CRM, Agreements, Agreement Templates, Template Line).




Template Line page

### *Agreement Line Details*

Add rows for each new line.

**Line Number**

Displays the agreement line number. The CRM system automatically increments this number for each row that you add. The agreement line number and description appear on cases that are covered by the agreement line entitlements. Service orders only display the agreement name, not line number.

**Service**

Select the service that is covered by the agreement line. For Field Service agreements, select a service. Support agreements do not reference services. You define services by using the Service component.

The PeopleSoft CRM system prompt displays only services with an active status and for which the Agreement check box has been selected on the Service page.

---

**Note.** Since there is no start date on the Template Line page, the system validates that the agreement start date occurs between the offer start date and the offer end date defined for the service on the Agreement Line page, not the Template Line page.

---

Internal agreement templates also require you to designate the person type and person status. The system uses these to select the agreements that apply to the case. For example, if a contingent worker in active status opens an IT Help Desk case, only agreement lines that have a person type of *Contingent Worker* and a status of *Active* apply.

### *Service Pricing Details*

Define the default criteria for retrieving pricing records for an agreement line.

| | |
|---|---|
| **Purchase Options** | Select the purchase options that you want the system to use for the agreement template. |
| **Prepaid Quantity** | Enter the number of work units of a service or support offering that a customer pays for in advance. This value only applies to the *Prepaid* purchase option. |
| **Product, Purchase Options** and **Prepaid Quantity** | Select the product covered by the agreement line, the purchase option, and the prepaid quantity.<br>If you select a service, the CRM system prompt displays all the products that are defined for the service. If no service is selected, the system prompt displays all products that are defined in it.<br>Products are established with the Product enterprise integration point (EIP) or the Product Definition component. |

### *Entitlements*

Displays the entitlements that are contractually owed to the customer for this agreement line. This information is initially populated by using the Entitlement Defaults page. The user, however, can modify the entitlements for each line.

---

**Note.** If you select the Available to Order field on the Agreement Template page, the system hides the Add row and Delete row buttons on the Entitlements grid. The system copies the entitlement information from the Entitlement Defaults page to each new line. You cannot change these entitlements in the Entitlements grid. This is required to ensure that all template lines, regardless of the product ID entered for each template line will have the same set of entitlements.

This is important when performing a side-by-side comparison of products in the product catalog to determine which service agreement is the best fit for the product selected. Additionally, if you select the Available to Order field, the system defaults the Purchase Option field to *FLAT* and makes it read only, since flat fee is the only type of agreement fee PeopleSoft Order Capture uses for the purchase of agreements. Therefore, it is important to ensure that you have first created flat free prices for each service or product that you intend to use on an agreement template.

---

### *Entitlements Apply To*

This group box appears only if you are defining an agreement template for PeopleSoft HelpDesk and you selected *Internal* as the agreement category. Also, the system displays a set of fields based on the options you selected on the Agreement Search Configuration page for the business unit you are using.

For example, if you selected the Match Using Case Criteria check box and then selected *Role, Department, Priority, Source,* and *Location* as categories that you wanted the system to use when searching for agreements, the system would display all of the fields.

Use the fields that appear in this group box to link the response and restore times to the different values for the various fields that can appear on the Case page. For example, if you set the priority for the agreement to low, and a user selects the Select Agreement link on a low priority case, the system displays the respond and restore times that you set up on the Entitlement Defaults page.

If you select *User Selects From All Matches*, *Autoselect Shortest Response*, or *Autoselect Longest Response*, on the Agreement Search Configuration page, the system does not display this group box.

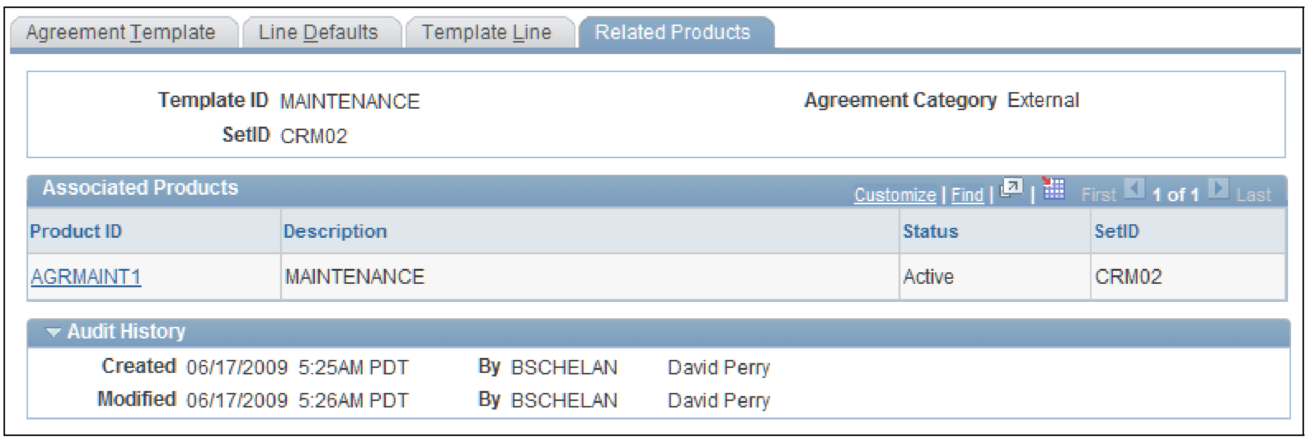
### See Also

*PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Setting Up Products"

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

## Viewing and Accessing Linked Product Definitions

Access the Related Products page (Customer Contracts CRM, Agreements, Agreement Templates, Related Products).




Related Products page

The Related Products page appears only if the template is being used with PeopleSoft Order Capture. The system uses the Related Products page to show all products that point to the template. The system does not display this page until you save the template and navigate to the page from one of the other pages in the Agreement Template component.

To access the Product Definition page, click the link under the Product ID field.

---

**Note.** If the Agreement Template is set to a closed status and there are active products in the Related Products tab, the system displays a warning message stating that there are active products associated with the Agreement Template and that inactivating the template may also inactivate the related products.

---

# Defining Agreements

This section provides an overview of agreement definitions and discusses how to:

- Define agreement header information.
- Specify people or sites that are entitled to service or support.
- Specify line defaults.
- Define detailed agreement line information.
- Define billing information.

## Understanding Agreement Definitions

When you create a case or service order for a customer and click the Select Agreement or Warranty button, the CRM system searches for agreement lines or warranties that cover the case or service order and displays the associated entitlements.

The CRM system uses the values that you have entered in the fields for product ID, serial number, and either site or SIN to search for agreement line and warranty matches for service orders.

For cases, the CRM system uses the same fields, as well as those for contact or PIN. For both cases and service orders, the entitlement match page also displays any transaction price information that is defined under the terms of the agreement.

Internal agreements define the levels of service that are available to Help Desk and HR Help Desk cases. These cases use the additional information of organizational relationship, as defined by the person type, and worker status to locate and display the levels of service that are defined on the agreement.

External - No Pricing agreements are similar to External agreements, except they do not display pricing-related fields, only prepaid amounts. Using External - No Pricing agreements enables you to specify how many free prepaid cases or services, or hours of support, a customer is entitled to on an agreement. For PeopleSoft Support, you can specify *prepaid* at the agreement header level or in the product grid on the agreement line. For FieldService, you can specify *prepaid* on the agreement header, agreement line for service, or on the product grid on the agreement line.

### *See Also*

Chapter 26, "Setting Up and Managing Agreements and Warranties," Understanding Agreement Pricing, page 484

Chapter 28, "Performing Entitlement Searches for Cases and Service Orders," page 557

*PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Creating and Managing Service Orders," Service Order Toolbar Functions

## Pages Used to Define Agreements

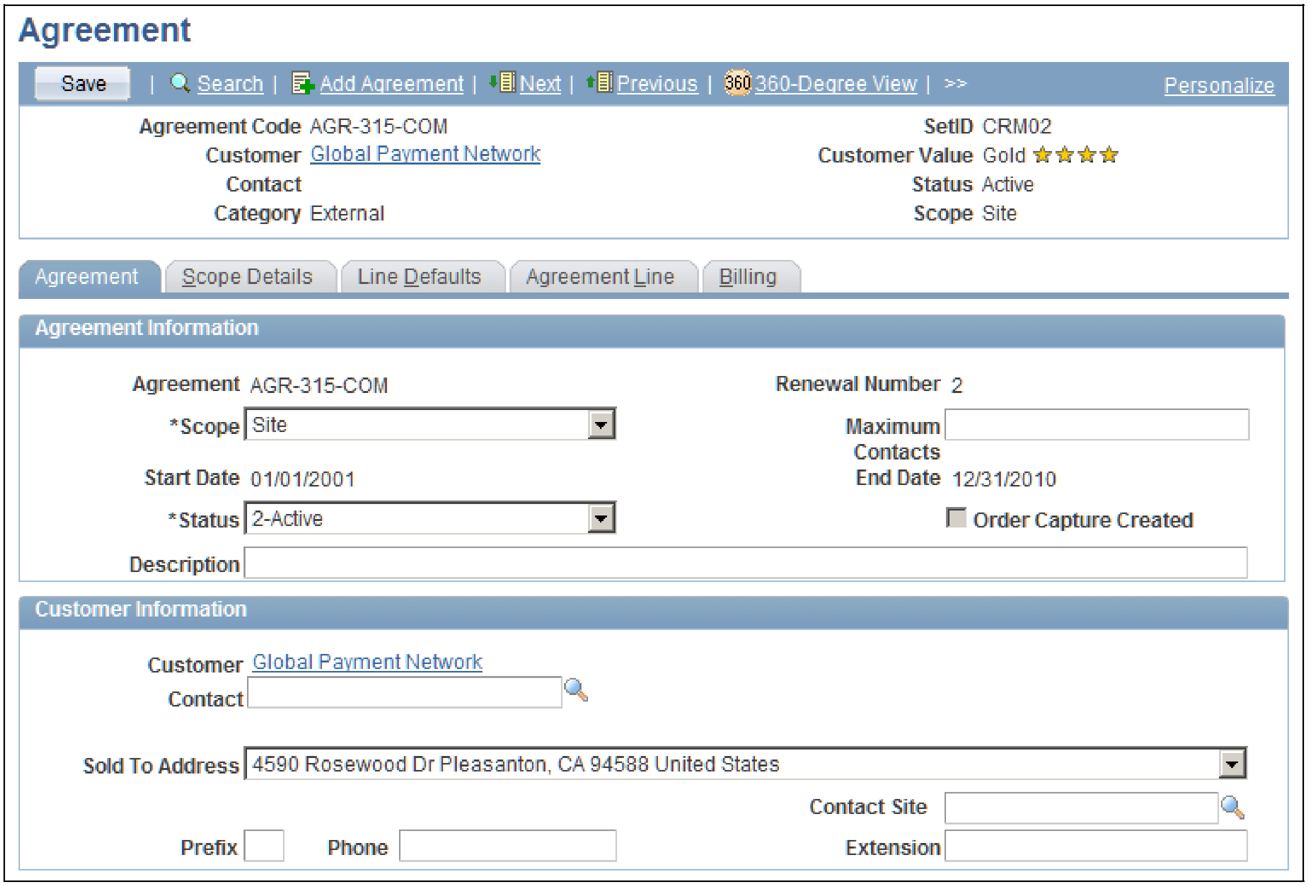
| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Agreement | RF_AGREEMENT_HDR | Customer Contracts CRM, Agreements, Agreements, Agreement | Define agreement header information. |

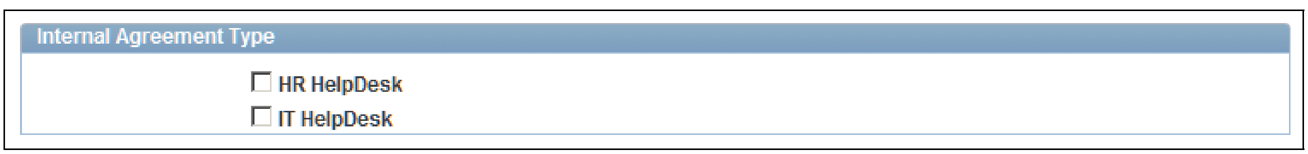
| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Scope Details | RF_AGREEMENT_COV | Customer Contracts CRM, Agreements, Agreements, Scope Details | Specify people that are entitled to call center support or customer sites that are entitled to the service that is detailed by agreement lines. |
| Line Defaults | RF_AGREEMENT_ENTL | Customer Contracts CRM, Agreements, Agreements, Line Defaults | Specify the default values to appear on rows that are added on the Agreement Line page. |
| Agreement Line | RF_AGREEMENT_LINE | Customer Contracts CRM, Agreements, Agreements, Agreement Line | Define detailed agreement line information for each service or support offering. |
| Billing | RF_AGREEMENT_BILL | Customer Contracts CRM, Agreements, Agreements, Billing | Define agreement billing information. |

## Defining Agreement Header Information

Access the Agreement page (Customer Contracts CRM, Agreements, Agreements, Agreement).




Agreement page (1 of 3)




Agreement page (2 of 3)


Agreement page (3 of 3)

**Agreement Category**

This field is required on the Add page when you are adding a new agreement. For agreements used in PeopleSoft HelpDesk, you must select *Internal* as the agreement category. For agreements used in PeopleSoft Support and PeopleSoft Integrated FieldService, select either *External* or *External - No Pricing* as the agreement category.

---

**Note.** In the top section of this page the system changes the field label to Category.

---

### *Copy From Agreement Template*

When you create a new agreement, you can either add all the information to it manually, or base it on an agreement template.

---

**Note.** This group box does not appear if the agreement has already been created and saved.

---

**Copy from Template** and **Template ID**

Select a template and then click the Copy from Template button to populate the agreement with information that is established in the selected agreement template.

---

**Note.** Because the integration with PeopleSoft Contracts requires certain validations before a user can set the status of an agreement to *Active,* the system does not copy the value of the Status field from the agreement template to the new agreement. The system initially sets the status of the new agreement to *Pending.*

A user can change the status of the agreement to *Active* by taking certain actions; but they cannot create a new agreement with a status of *Active* by copying information from an agreement template.

---

### *Agreement Information*

**Renewal Number**

Displays the renewal version of the agreement. When an agreement is first created, this value is set to *1.* Each time you renew the agreement by clicking the Renew Agreement button, the CRM system increments this value by 1.

**Scope** and **Maximum Contacts**

Select either *Site* or *Contact* to indicate if the agreement applies to sites or callers (contacts). If you select *Contact,* enter the maximum number that would be allowed to call within the scope of the agreement.

---

**Note.** These fields do not appear on the page if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

---

**Status**

Select from *Pending, Pending Activation, Action Required, Active,* or *Closed.*

There are no system processes that change the status value of the agreement, but you can manually change the status. When an entitlement search is performed for a case or a service order, the CRM system includes only agreements with an *Active* status that are effective on the date that the search is performed.

---

**Note.** When renewing an agreement, you should manually adjust the status of the old agreement to *Closed* on the date that it expires and ensure that the status of the new agreement is set to *Active.*

For example, if you renew an agreement one week before it expires, the new agreement should have a status of *Pending Activation,* and the old agreement should retain its status of *Active* until the renewal date matches the current date. At that point the old agreement status should be set to *Closed,* and the new agreement status should be set to *Active.*

If you have an integration with PeopleSoft Transaction Billing Processor, the system makes the *Pending Activation* and *Action Required* statuses available. Additionally, if you are using this integration, the system changes the status from *Pending Activation* to *Active* or *Action Required* based on the success you have creating a corresponding entry in PeopleSoft Transaction Billing Processor.

---

**Order Capture Created**

If this check box is selected the agreement was created through PeopleSoft Order Capture.

**Contract Details**

Click this link to go the Contract Information page. Use this page to view contract information associated with the contracts business unit, general ledger business unit, and contract details. This applies only when integrating to the Contracts module in PeopleSoft Financials.

### *Internal Agreement Type*

This section appears on the page for internal agreements only.

### *Customer Information*

This section does not appear on the page if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

**Customer**

Click the Search button to select the name of the customer. Customers are established by using the Customer EIP, the Company component (select Customers CRM, Add Company) or the Consumer component (select Customers CRM, Add Person).

| | |
|---|---|
| **Contact** | Click the Search button to select the name of the customer's agent. This is the person to contact about agreement administration issues, such as renewing and remitting payment for agreements.<br>You define contacts by using the Contact component or the Contacts page of the Company, Consumer, or Site component. |
| **Contact Site** | Select the customer site that is associated with the contact. You establish this relationship by using the Customers page of the Contact component.<br>**Note.** The prompt for this field shows only sites that are associated with the contact. |
| **Prefix, Phone,** and **Extension** | Enter the telephone information for the customer's contact. If you select a contact, the CRM system populates these fields with the primary telephone information of the person's role as a customer's contact. You can modify this information as needed. |

### *Contact Information*

These fields appear on the page only if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

The contact fields on the main Agreement page for internal agreements are functionally similar to the customer contact fields mentioned above for external agreements. They refer to the person to contact about the agreement administration issues.

Some users may mistakenly assume that the contact listed on the main page of an internal agreement represents the person or worker for whom the agreement was created, or who was covered by the agreement. This field is only used to represent the administrative contact for the internal agreement.

| | |
|---|---|
| **First Name, Last Name, Phone, Location** and **Search** | Click the Search button to select the name of the contact. You define contacts by using the Workforce component (select Workforce, Create Worker). |
| **Prefix, Phone,** and **Extension** | Enter the telephone information for the contact. If you select a contact, the CRM system populates these fields with the primary telephone information of the contact. You can modify this information as needed. |

### *Default Provider Group*

Enter the default provider group and group member that get assigned to perform the services that are covered by this agreement. These default values apply to service orders only; they do not apply to cases.

**Note.** This group box does not appear on the page if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

### See Also

Chapter 26, "Setting Up and Managing Agreements and Warranties," Defining Agreement Templates, page 508

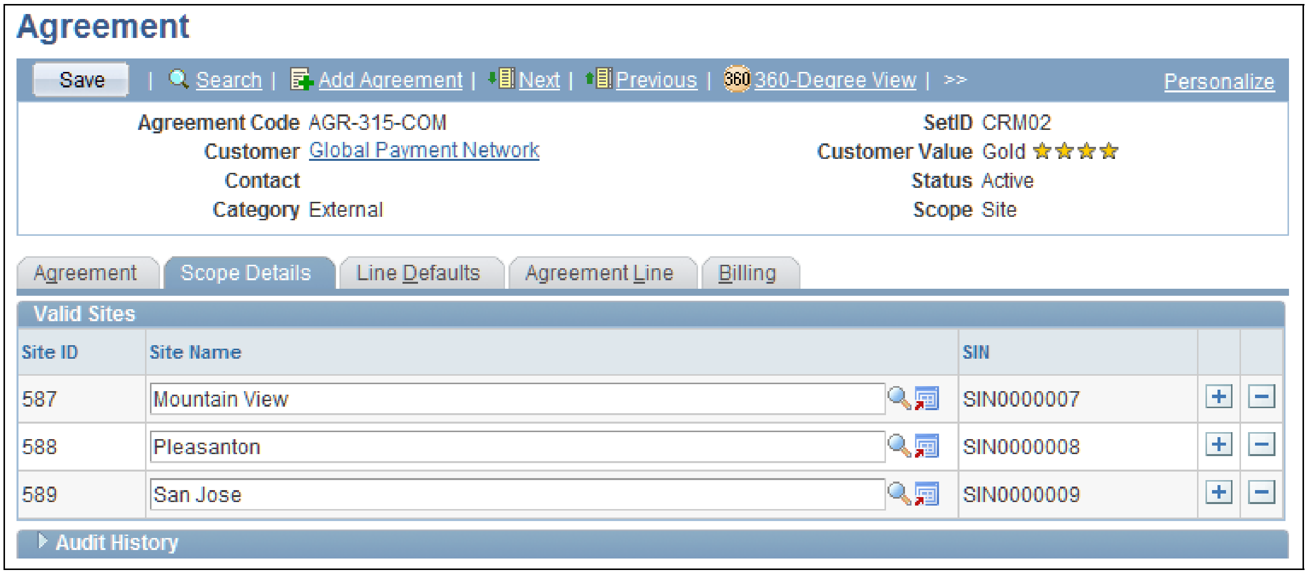
Chapter 28, "Performing Entitlement Searches for Cases and Service Orders," page 557

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Company Business Objects"

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Person Business Objects," Defining Consumer Information

## Specifying People or Sites That Are Entitled to Service or Support

Access the Scope Details page (Customer Contracts CRM, Agreements, Agreements, Scope Details).




Scope Details page

This page varies depending on the scope that is specified on the Agreement page. For agreements with the contact scope, you enter the people who are eligible for support. These agreements are only available to PeopleSoft Support. For agreements with the site scope, you enter sites that are eligible for service. These agreements are available to both PeopleSoft Support and PeopleSoft Integrated FieldService.

---

**Note.** This page does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

---

### Named Callers

This grid appears if the selected agreement has a scope of contact. Enter the people who are eligible to request support that is related to this agreement.

**Primary** Select if this person is the primary caller.

**Name** Enter the name of a person who is entitled to request support that is defined by the agreement lines. Named callers must first be established as contacts by using the Contact component or the Contacts page of the Company, Consumer, or Site component. The number of contacts that you specify cannot exceed the number of maximum contacts that are recorded on the Agreement page.

**Note.** For consumer agreements with scope as the contact, the CRM system populates the first row of the Named Callers grid with the name of the customer that is specified on the Agreement page. You can change this value or add additional rows.

**PIN** (personal identification number) Displays a unique value that is generated by the CRM system for each caller when the agreement is saved. Customers calling to request support under the terms of the agreement provide their PIN to your customer service representative (CSR). The CRM system uses the PIN that the CSR enters on cases to identify the agreement that defines the customer's entitlements.

**Note.** The PIN is unique for every person within an agreement. If a person is a named caller on two agreements, this person is assigned two PINs.

### *Valid Sites*

This grid appears if the selected agreement has site as the scope. Enter customer sites that are eligible to receive support or services specified on its agreement lines.

**Site Name** Enter the name of the site that is covered by this agreement. The CRM system displays the site ID of the selected site automatically.

**SIN** (site identification number) Displays a unique value that is generated by the CRM system for each site when the agreement is saved. Customers calling to request service under the terms of the agreement provide the SIN to your CSR. The CRM system uses the SIN that the CSR enters on cases or service orders to identify the agreement line that defines the customer's entitlements for a particular site.

**Note.** The SIN is unique for every site within an agreement. If a site is valid on two agreements, the site is assigned two SINs.

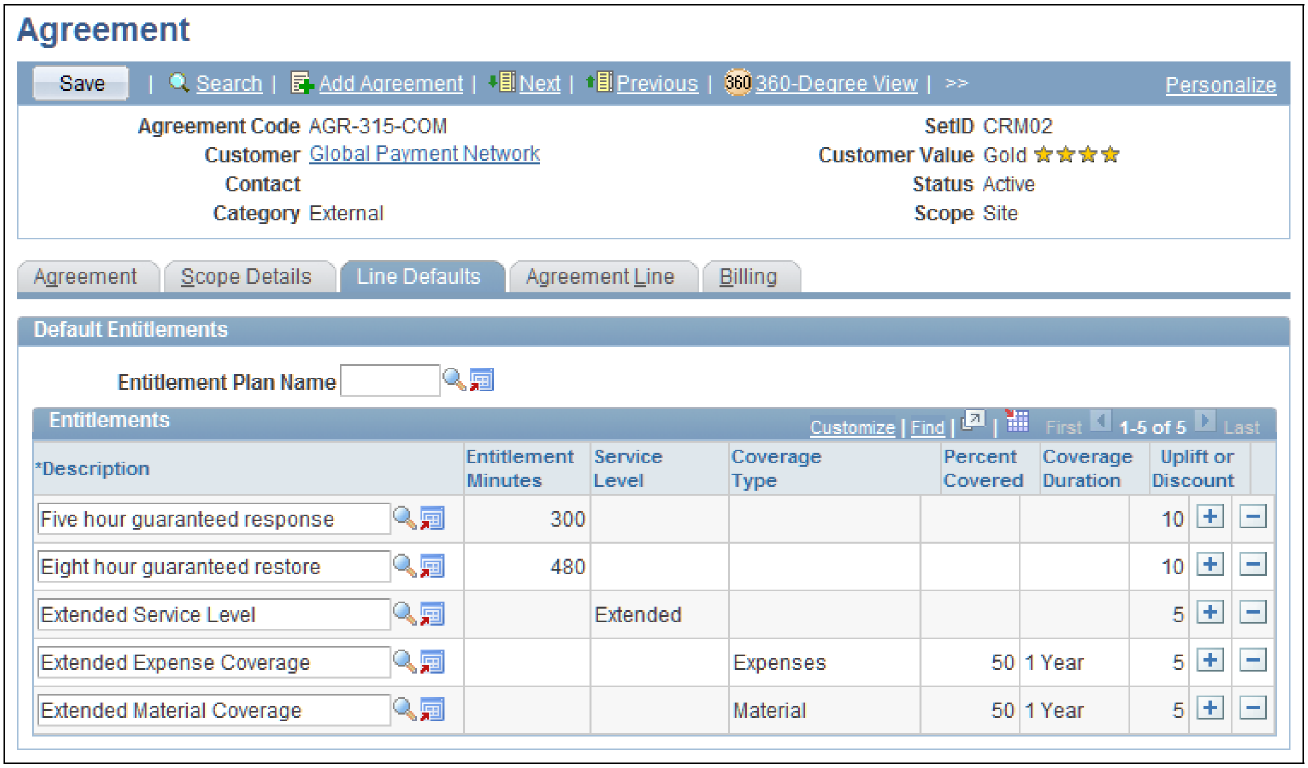
### *See Also*

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Site Business Objects"

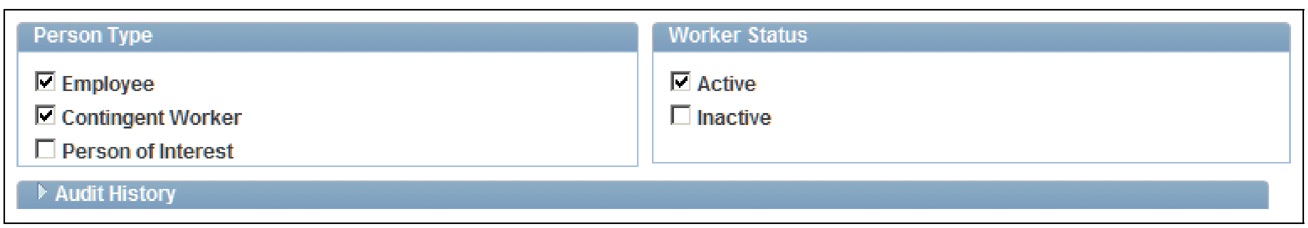
 

## Specifying Line Defaults

Access the Default Entitlements page (Customer Contracts CRM, Agreements, Agreements, Line Defaults).




Line Defaults page (1 of 2)




Line Defaults page (2 of 2)

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**Note.** If you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement, the system does not display the Coverage Type, Percent Covered, Coverage Duration and Uplift or Discount fields. The group boxes with the Person Type and Worker Status check boxes shown in the example above is only relevant for and displayed for internal agreements. It is not displayed for external or external-no pricing agreements

---

### *Default Entitlements*

**Entitlement Plan Name**

Select a default entitlement plan to populate the grid initially. You define entitlement plans on the Entitlement Plan Setup page.

The list of entitlements in the grid becomes the default entitlement set for each new line that is added on the Agreement Line page.

Add or delete entitlements on each agreement line to define the final set of entitlements that is contractually owed to the customer. Each line in the grid is associated with the entitlement information that is defined on the Entitlements page.

**Description**

Click the Lookup Entitlement Name button to locate entitlements that you want to add to the Entitlements grid.

---

**Note.** Any changes that you make to the defaults do not affect any existing agreement lines.

---

### *Additional Selections for Internal Cases*

**Person Type**

Select the person type. Available choices are *Employee, Contingent Worker,* and *Person of Interest.*

---

**Note.** *Person of Interest* does not appear for IT Help Desk cases.

---

**Worker Status**

Select the status of the worker.

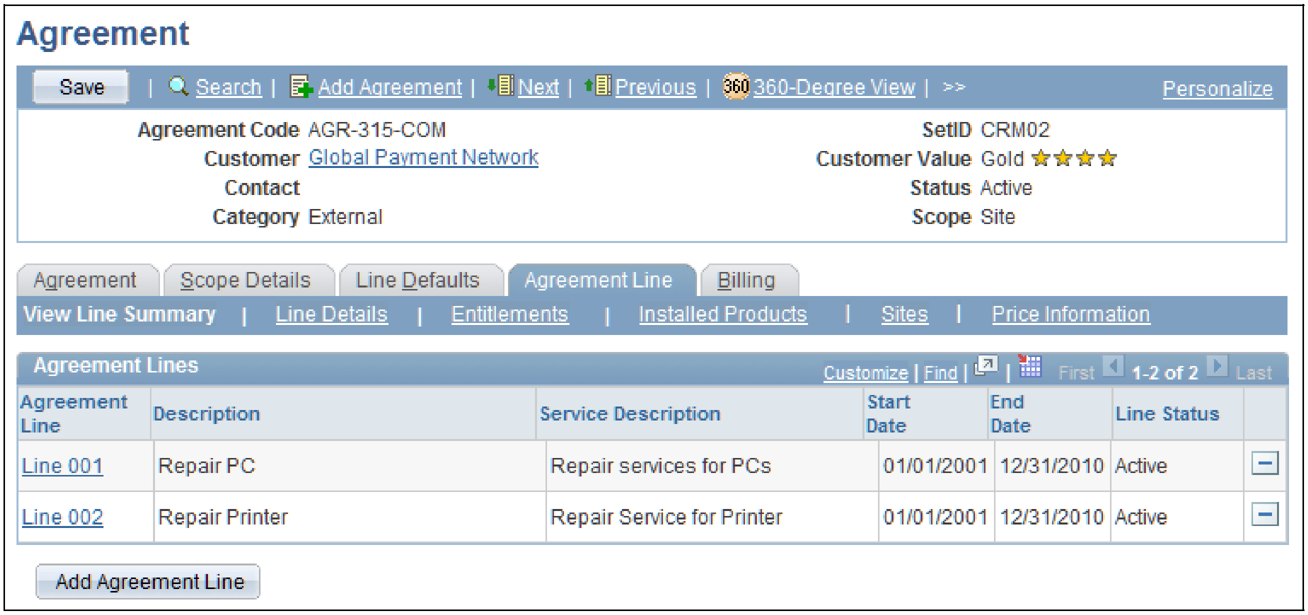
### *See Also*

Chapter 26, "Setting Up and Managing Agreements and Warranties," Defining Entitlements, page 497

Chapter 26, "Setting Up and Managing Agreements and Warranties," Defining Entitlement Plans, page 500

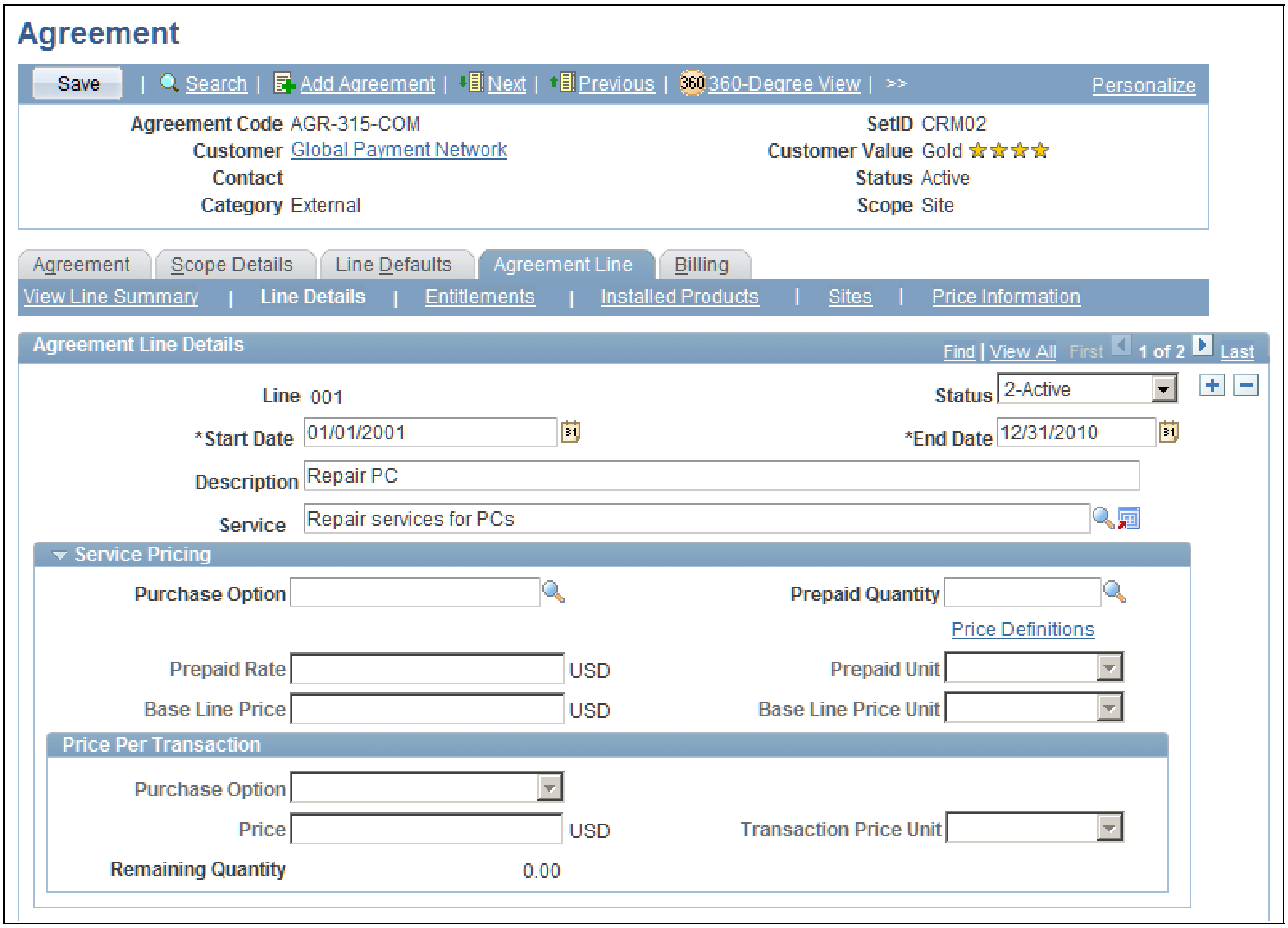
## Defining Detailed Agreement Line Information

Access the Agreement Line page (Customer Contracts CRM, Agreements, Agreements, Agreement Line).

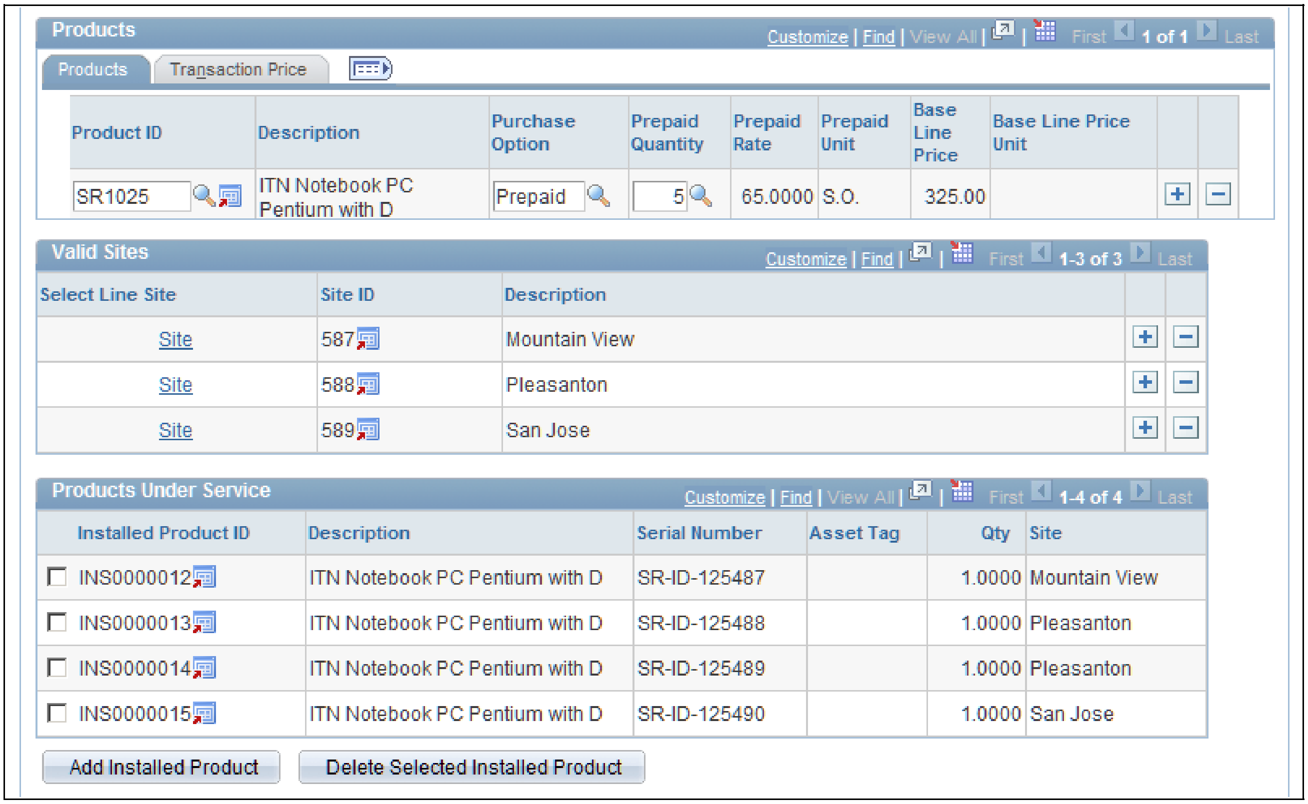



Agreement Line - View Line Summary page




Agreement Line - Line Details page (1 of 3)



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

Products | Transaction Price

| Product ID | Description | Purchase Option | Prepaid Quantity | Prepaid Rate | Prepaid Unit | Base Line Price | Base Line Price Unit |
|---|---|---|---|---|---|---|---|
| SR1025 | ITN Notebook PC Pentium with D | Prepaid | 5 | 65.0000 | S.O. | 325.00 | |

Valid Sites — Customize | Find | First 1-3 of 3 Last

| Select Line Site | Site ID | Description |
|---|---|---|
| Site | 587 | Mountain View |
| Site | 588 | Pleasanton |
| Site | 589 | San Jose |

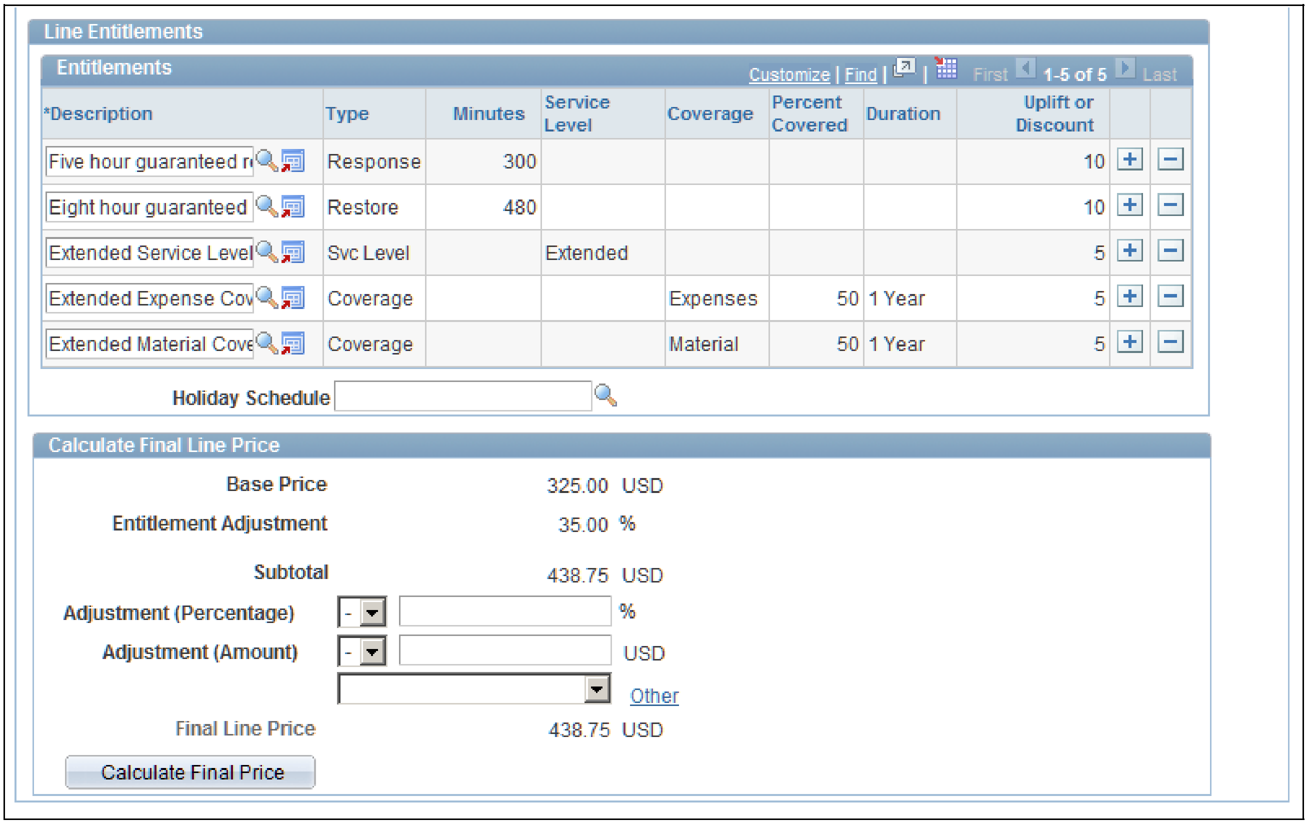
Products Under Service — Customize | Find | View All | First 1-4 of 4 Last

| Installed Product ID | Description | Serial Number | Asset Tag | Qty | Site |
|---|---|---|---|---|---|
| INS0000012 | ITN Notebook PC Pentium with D | SR-ID-125487 | | 1.0000 | Mountain View |
| INS0000013 | ITN Notebook PC Pentium with D | SR-ID-125488 | | 1.0000 | Pleasanton |
| INS0000014 | ITN Notebook PC Pentium with D | SR-ID-125489 | | 1.0000 | Pleasanton |
| INS0000015 | ITN Notebook PC Pentium with D | SR-ID-125490 | | 1.0000 | San Jose |

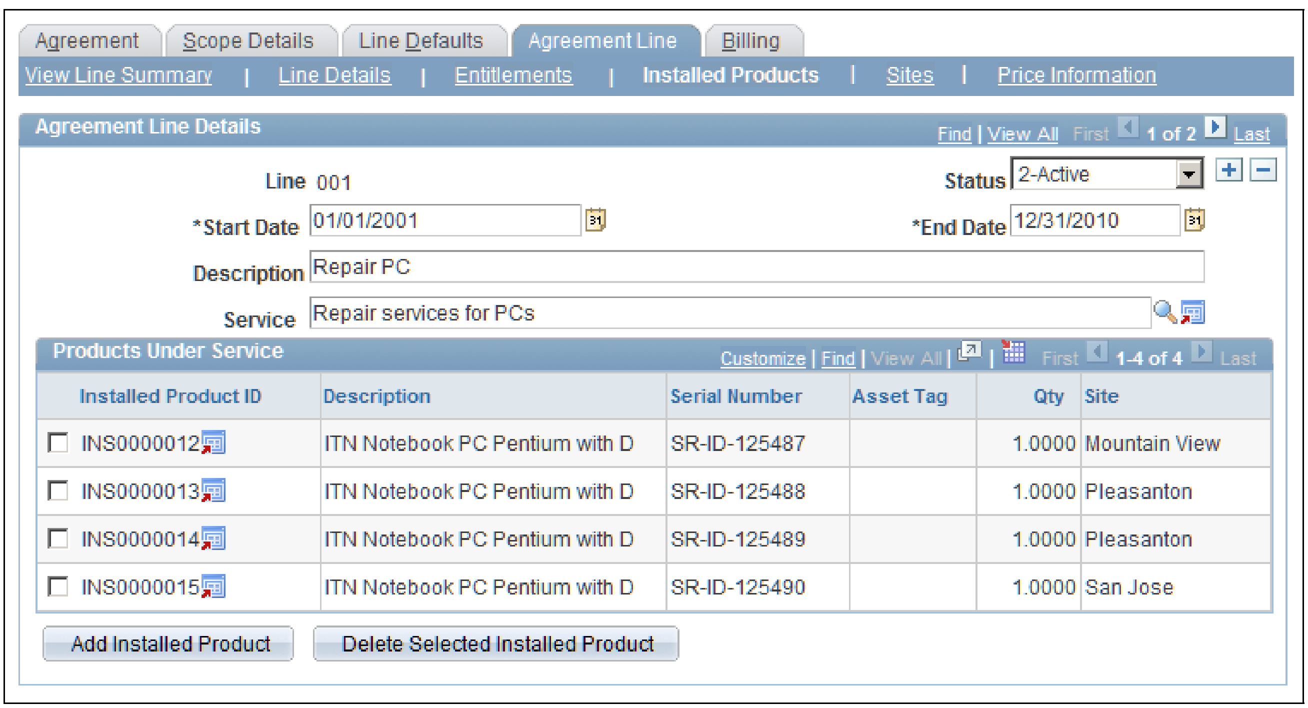
Add Installed Product | Delete Selected Installed Product

Agreement Line - Line Details page (2 of 3)

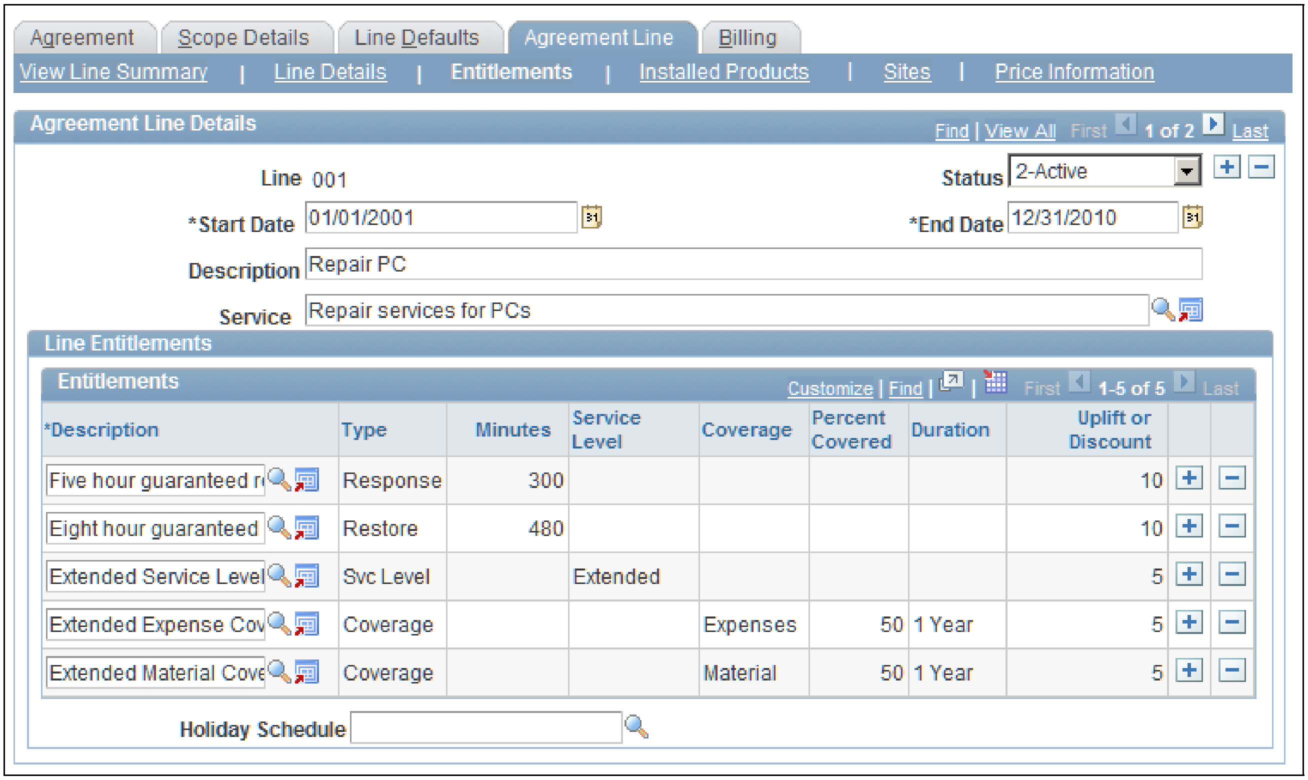



Agreement Line - Line Details page (3 of 3)

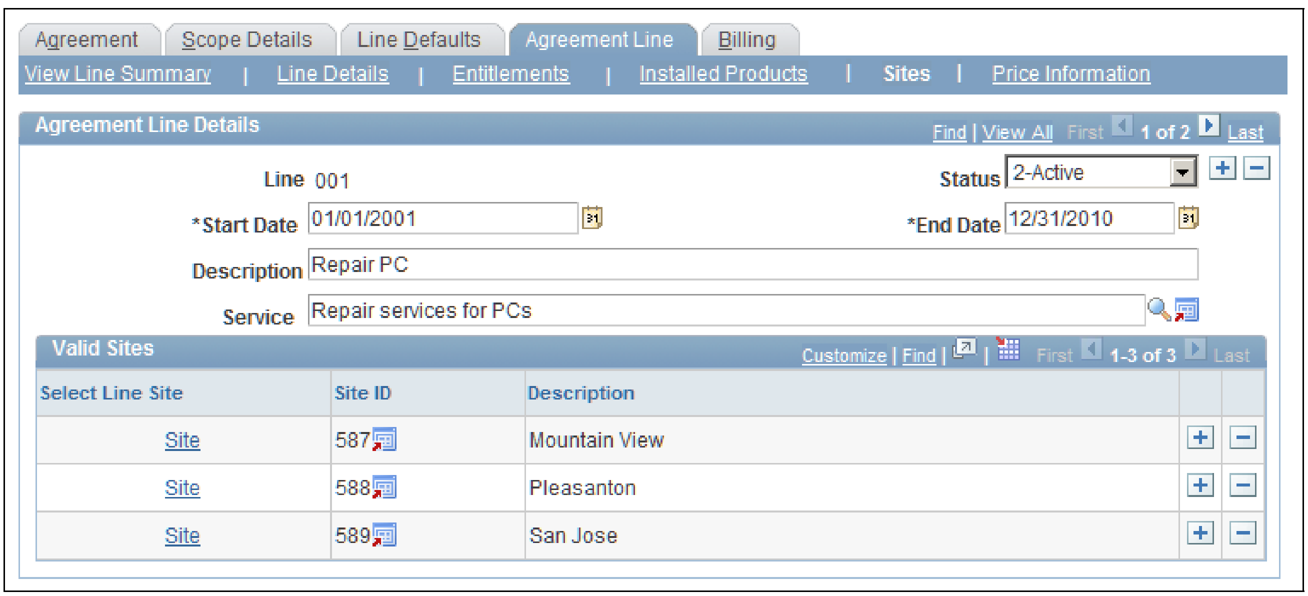



Agreement Line - Installed Products page

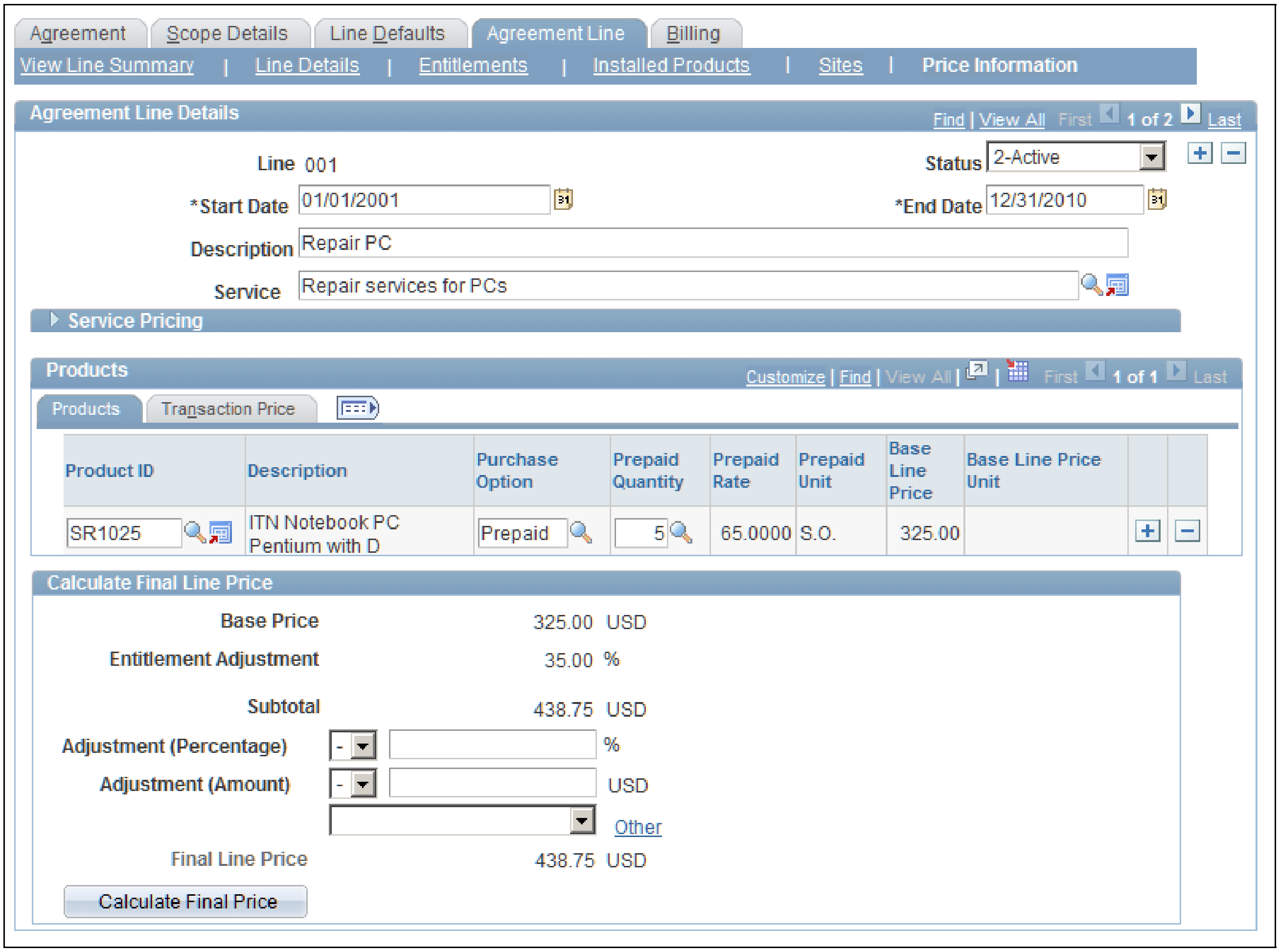



Agreement Line - Entitlements page




Agreement Line - Sites page




Agreement Line - Price Information page

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**Note.** If you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement, the system does not display the Sites and Price Information sub pages and links. If you selected *External - No Pricing* as the agreement category, the system does not display the Price Information sub page.

---

### *Agreement Line: View Line Summary*

If an agreement has multiple agreement lines, they are listed in the Agreement Lines summary grid (available when you click the View Line Summary link) with basic information such as agreement line and service descriptions, product name, and product ID number. Click the agreement line number link to access the Agreement Line Details group box, where you can edit and view the corresponding line in detail.

If there is only one line in the agreement, the CRM system displays the Agreement Line Details group box together with pricing, site, entitlements, and product information.

When you click the Line Details link at the top of the page, the CRM system displays information for the selected agreement line in group boxes such as Retrieve Base Line Price, Calculate Final Line Price, Entitlements and so on. To minimize the need for scrolling, you can click the Sites, Entitlements, Installed Products, or Price Information links to view corresponding information selectively.

### *Agreement Line: Line Details - Agreement Line Details*

Use this group box to add new lines to the agreement. Enter the status, start and end dates, description and service for the agreement service line. Click the Billing Information link to set up the billing schedule, purchase order, and payment terms information for the agreement line.

The Billing Information link only appears when the customer is integrating with the Contracts module in PeopleSoft Financials.

---

**Note.** For internal agreements (IT Help Desk and HR Help Desk), the Person Type and Worker Status fields also appear in this section.

---

### *Agreement Line: Line Details - Service Pricing*

Use this group box to enter purchase option and transactional information for the agreement line service. Click the Price Definitions link to access the Service Pricing page.

### *Agreement Line: Line Details - Products*

Use this section to define the products, purchase options, and prepaid quantity (if there is one). The system displays the prepaid rate, base line price, and base line price unit if it is stored in the system.

To view the transaction price for the product, click the Transaction Price tab. This section displays the transaction price on the corresponding agreement service pricing record. The price is based on the service or service-product combination that is defined for the agreement line.

The CRM system matches the value for the service and product fields on the agreement line with a unique pricing record that contains the same service and product values. In addition, this pricing record must contain the appropriate currency code for the agreement line. Never define more than one agreement service pricing record in the Pricing Information page for the same combination of service, product, and currency code, because this implies multiple prices for a single transaction.

You may associate a support-oriented agreement line with multiple products unless you have an integration to PeopleSoft Contracts. In this case you can only have one product per support-oriented agreement line (an agreement line with no Service). If you are not using the Contracts Integration feature, the save-edit check is disabled and you can enter multiple rows of data in the Product grid for the agreement line.

After defining the product and purchase option (prepaid options, if applicable), the other price related fields on this grid are populated when the user clicks the Calculate Final Price button.

When you perform an entitlement search from a case or a service order, the CRM system displays the transaction price or the remaining quantity that is defined on the customer's agreement.

---

**Note.** A credit card link on support cases is enabled when the associated agreement line includes a price per transaction and does not entitle the customer to 100 percent coverage of time, material, and expenses. Also, many of the fields related to pricing do not appear if you selected *External - No Pricing* as the agreement category.

---

**Purchase Option** Displays the method of purchasing the service or support offering for an agreement or agreement service transaction.

| | |
|---|---|
| **Prepaid Rate, Prepaid Unit, Baseline Price** and **Baseline Price Unit** | Displays the amount paid per unit of work or per unit of time, depending on the purchase option of the agreement.<br><br>Rates that are retrieved from an agreement service pricing record with a flat purchase option can be by the hour, case, or service order. Rates that are retrieved from an agreement service pricing record with a time and material purchase option can be per unit of time—hour, day, week, month, or year. |
| **Transaction Purchase Option, Transaction Price Unit, Transaction Price,** and **Currency Code** | Displays the transaction purchase option, the price per unit, the total transaction price and the currency.<br><br>The currency that is displayed for the rate reflects the currency that is entered on the Billing page of this component. |
| **Remaining Quantity** | Displays the amount of the prepaid quantity that has not been used. For field service agreements, the prepaid quantity is in units of service orders or hours.<br><br>For example, the CRM system reduces this quantity each time a user saves a new service order that is covered by the agreement line. If the service order is canceled, the CRM system readjusts the remaining quantity accordingly.<br><br>For support agreements, the prepaid quantity is in units of cases or hours. Workflow processes must be implemented to update remaining quantity on support agreements. |

### *Agreement Line: Line Details - Valid Sites*

Use this section to add any valid sites to the agreement line. The system displays the site ID and description.

**Note.** Every line of a site-based agreement must be linked to at least one site.

### *Agreement Line : Line Details - Products Under Service*

Use this section to add or delete any installed products that are covered by the agreement line. The system displays the description, serial number, asset tag (if there is one), quantity, and site where the product is installed.

Use the Add Installed Product and Delete Installed Selected Product buttons to make changes to the products listed under this group box.

### *Agreement Line: Line Details - Entitlements*

This section lists the entitlements that are contractually owed to the customer for an agreement line. These are initially populated by using the set of entitlements that are defined on the Default Entitlements page of this component. You can add or delete entitlements in the grid by adding and deleting rows.

The system also displays the Holiday Schedule field after the entitlements. It appears by default from the Service Level page. You can override it or clear it. For Platinum customers, you may want inactivate the holiday schedule by clearing the field. If you enter a holiday schedule without a service level, the system treats it as a 7 x 24 entitlement with holiday schedule.

### *Entitlements Apply To*

The system displays a group of fields based on the options you selected on the Agreement Search Configuration page for the business unit you are using.

Use the fields that appear in this group box to link the response and restore times to the different values for the various fields that appear.

For example, if you selected the *Match Using Case Criteria* option and selected *Role, Department, Priority, Source,* and *Location* as categories that you wanted the system to use when searching for agreements, the system would display all of the fields on this page.

If you do set values for the fields appearing in this group box, the system uses them to search for agreements when a user selects the Select Agreement link from the Case page.

For example, if you set the Priority field to *Low* on this page, the system would locate this agreement line and use the response and restore times that you set up on the agreement line for all low priority cases that meet the other criteria of the agreement line.

For all low priority cases that fulfill the other matching considerations for a valid agreement line for all low priority cases, the system uses other standard fields that are considered for an agreement match, such as start and end date, status, product, installed product, asset, and so on. The system is not using the other criteria in the Entitlements Apply To section.

### *Agreement Line: Line Details - Calculate Final Line Price*

This section displays the variables that the CRM system used to calculate the final line price for the agreement line.

---

**Note.** This section does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement. If you selected *External - No Pricing* as the agreement category, the system does not display this section either.

---

**Base Price**

Displays the base price for the service or service product combinations of the agreement line.

**Note.** For agreement lines with a prepaid purchase option, this value is informational only. The prepaid rate, not the base price, is used to calculate the final line price.

**Entitlement Adjustment**

Displays the sum of the uplift and discount percentage values that are associated with the entitlements on this agreement line after clicking the Calculate Final Price button.

**Subtotal**

Displays the subtotal for the agreement line after the base price has been adjusted by the entitlement uplift or discount.

**Adjustment (Percentage)**

Select the positive (+) or the negative (–) sign from the drop-down list box and then enter a percentage by which you want to adjust the price of the agreement line.

| | |
|---|---|
| **Adjustment (Amount)** | Select the positive (+) or the negative (–) sign from the drop-down list box and then enter an amount by which you want to adjust the price of the agreement line. |
| **Reason** | Select the reason that you are making the adjustment. If the reason is not listed in the drop-down list box, click the Other link and enter the reason you are making the adjustment. |
| **Final Line Price** | Displays the final price for the agreement line.<br>Sum of the Prepaid Quantity *x* Prepaid Rate |
| **Calculate Final Price** | Click this button to calculate the final price for the agreement line. The system retrieves all appropriate service or service/product prices, calculates subtotals and adds and subtracts any discounts or adjustments that you have made to the base price. |

### Agreement Line: Installed Products

The section lists all of the installed products covered by that agreement line. If the agreement covering the service order has a scope of *Site,* the installed products are limited to those that match the sites that are covered by the agreement line.

The CRM system displays the Products Under Service grid if you choose to view line details or just the installed product information of the agreement line.

It lists the customer's installed products that are eligible for the service or support specified on the agreement line. Installed product information must be added manually to the agreement.

When installed products are added to an agreement line, the CRM system automatically updates them on the agreement line whenever replacements are made at the customer's site (when material is recorded in the Service Order on the Time Material Expense page).

Before selecting an installed product, you must define a product for the agreement line; and, for agreements with a scope of *Site,* select the sites that will be covered by the line.

If the scope of the agreement is *Contact,* the installed product choices are limited to those that match the product and customer specified. You can never select installed products with a status of *Uninstalled.*

### Agreement Line: Entitlements

This section lists the entitlements that are contractually owed to the customer for an agreement line, including the holiday schedule. These are initially populated by using the set of entitlements that are defined on the Default Entitlements page of this component.

### Agreement Line: Sites

The section lists all of the sites associated with the agreement line: the allowable values are determined by the sites that were entered on the Scope Details page. You can add or delete sites displayed in the grid by adding and deleting rows.

---

**Note.** This section does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

---

### *Agreement Line: Price Information*

Use this group box to enter purchase option and transactional information for the agreement line. Click the Price Definitions link to access the Service Pricing page.

For more information and field descriptions, refer to the Line Details - Products section for the Agreement Line Tab.

---

**Note.** This section does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement. If you selected *External - No Pricing* as the agreement category, the system does not display this section either.

---

### *See Also*

Chapter 26, "Setting Up and Managing Agreements and Warranties," Specifying Line Defaults, page 524

Chapter 28, "Performing Entitlement Searches for Cases and Service Orders," page 557

Chapter 26, "Setting Up and Managing Agreements and Warranties," Specifying Line Defaults, page 524

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

*PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Setting Up Services"

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

## Defining Billing Information

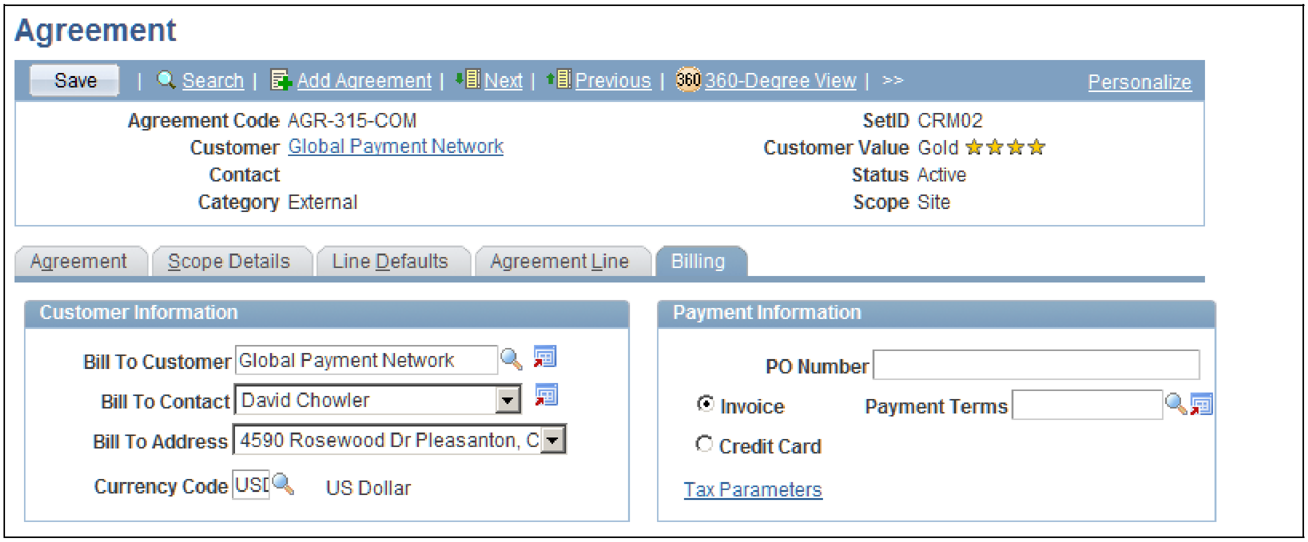
Access the Billing page (Customer Contracts CRM, Agreements, Agreements, Billing).

---

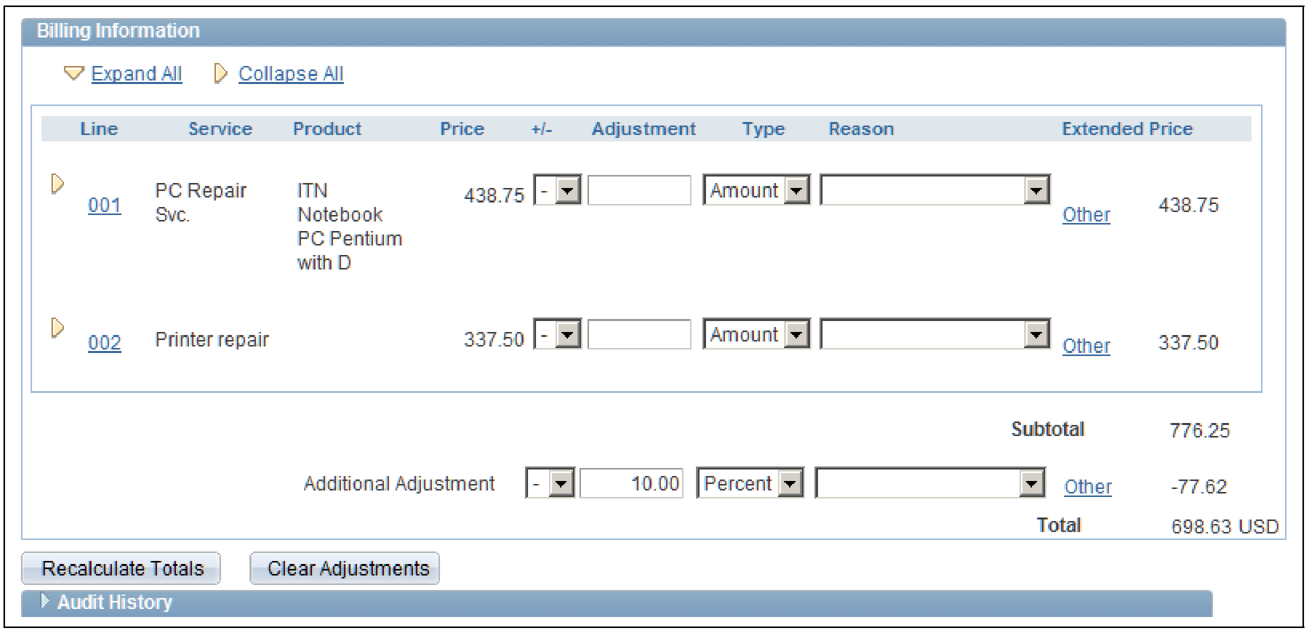
**Note.** This page does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement. If you selected *External - No Pricing* as the agreement category, the system does not display this page either.

---




Billing Details page (1 of 2)




Billing Details page (2 of 2)

### *Customer Information*

These fields capture information to determine how much to charge the customer for the agreement and the method of remittance that the customer uses.

**Bill to Customer** Select the customer that should be billed for the service. The primary customer appears by default in this field.

**Bill To Contact** Select the contact that should be billed for the service. The primary contact appears by default in this field.

**Bill To Address**

Select the bill to customer address to which the bill should be sent. The primary bill to address appears by default in this field.

**Currency Code**

Select the currency that the customer is using for the transaction.

The currency name appears to the right of the field. When the information is sent to PeopleSoft Contracts, the system prints the name of the currency on the invoice. The base currency of the sold to customer appears by default in this field.

### *Payment Information*

**Purchase Order**

Enter the customer-provided purchase order number.

---

**Note.** This field does not have any integration to PeopleSoft Supply Chain Management (PeopleSoft SCM) and is not required. If you enter a purchase order number in this field, the system posts it to PeopleSoft Contracts. When PeopleSoft Contracts sends the information to PeopleSoft Billing for invoice generation, the system prints the purchase order number on the invoice.

---

**Invoice**

Select if the customer intends to pay for the service by invoice.

**Payment Terms**

If you selected the Invoice option, use this field to select the payment terms for the invoice (for example, *NET30 - Due in 30 days*). The payment terms appear on the invoice that is sent to the customer.

**Credit Card**

Select if the customer intends to pay for the service by credit card. The system displays the Credit Card Information link after you select this option.

**Credit Card Information**

Click to access the Credit Card Details page, where you enter credit card authorization information, such as the card type, card number, expiration month and year, and card verification number.

---

**Note.** The system deletes the card verification number after the credit card authorization process is completed.

---

The system populates the name of the cardholder, email address and phone number of the bill to contact (selected on the Billing page). It also populates the bill to address as the default address for the new credit card. You can enter a new address, or click the Edit link to update the selected address in the corresponding Person record.

The system displays the authorization status, date, and code on the Transactions Results page after you click the Submit Transaction button on the Credit Card Details page.

---

**Note.** You can integrate credit card information with Cybersource, a third-party card vendor.

---

The Credit Card Details page is also used in the Case component to submit customers' credit card information for authorization purposes.

See  and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Managing Credit Card Payments," Submitting Credit Card Information for Authorization.

**Tax Parameters**

Click this link to access the Tax Parameters page. Use this page to indicate whether the customer is exempt from taxes. If the customer is tax exempt, enter the exemption certificate number and tax code that the customer supplies to you.

The system uses a default tax code based on the customer's address; however, you can override it by choosing another value.

**Schedule**

Select the schedule to indicate the way in which the revenue needs to be recognized in the general ledger. The system synchronizes this information from the general ledger.

### *Billing Information*

Managers can use this section to adjust the fees by increasing or decreasing a fee by a percent or by an amount.

The system does not use the new price in the totals until a user clicks the Recalculate Totals button. The system then calculates the sum of all active or closed lines, including those that have changed, and provides the recalculated amount in the Total Amount field.

Click the Expanded button to the left of the Line column to view all billable amounts that were included in the price for a given fee.

| | |
|---|---|
| **+/-** | Select the positive (+) or the negative (–) sign from the drop-down list box and then enter the number by which you want to adjust the price of the agreement line. |
| **Adjustment** | Enter the number, either a percentage or an amount, by which you want to make an adjustment. |
| **Type** | Select *Percent* or *Amount.* |
| **Reason** | Select the reason for the adjustment. These values are user-definable. You define reason codes on the Reason Code page (select Set Up CRM, Common Definitions, Codes and Autonumbering, Reason Codes). Use *Agreement Billing Adjustment*, *Case Billing Adjustment* or *Svc Order Billing Adjustment* as the reason type when you set up your reason codes.<br>See and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook,* "Setting Up Call Center Prompt Tables," Setting Up Reason Codes. |
| **Other** | If the predefined values for the Reason field do not describe the reason for the adjustment, click this link to access the Other Reason page where you can enter a unique description of the reason. |
| **Extended Price** | This value is calculated when you click the Recalculate Totals button. The system sums the total of the price, plus or minus any adjustments. |
| **Recalculate Totals** | Click this button any time there is a change to the Billing Details grid that impacts the price or the currency code. The system recalculates the total cost of the fees. |
| **Clear Adjustments** | Click this button to clear the adjustments that were made and return to the original total amounts. |

# Defining Warranties

This section provides an overview of warranty definitions and discusses how to define warranties.

## Understanding Warranty Definition

Use the Warranty component to define the duration and entitlements that are associated with a warranty. Defined warranties are associated with items on the Item Definition page.

If a product references an item in its product definition and this item is associated with a warranty, any installed product that is subsequently created for this product then contains the warranty information of its own item. You can manually update or delete the associated warranty for an individual installed product.

For items that are installed at a customer's site, you can activate the warranty on a customer's installed product by using the Installed Product component. When searching for entitlements for a product on a case or service order, the CRM system checks the response time, so a warranty match may appear before or after an agreement on the results page.

### *See Also*

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

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

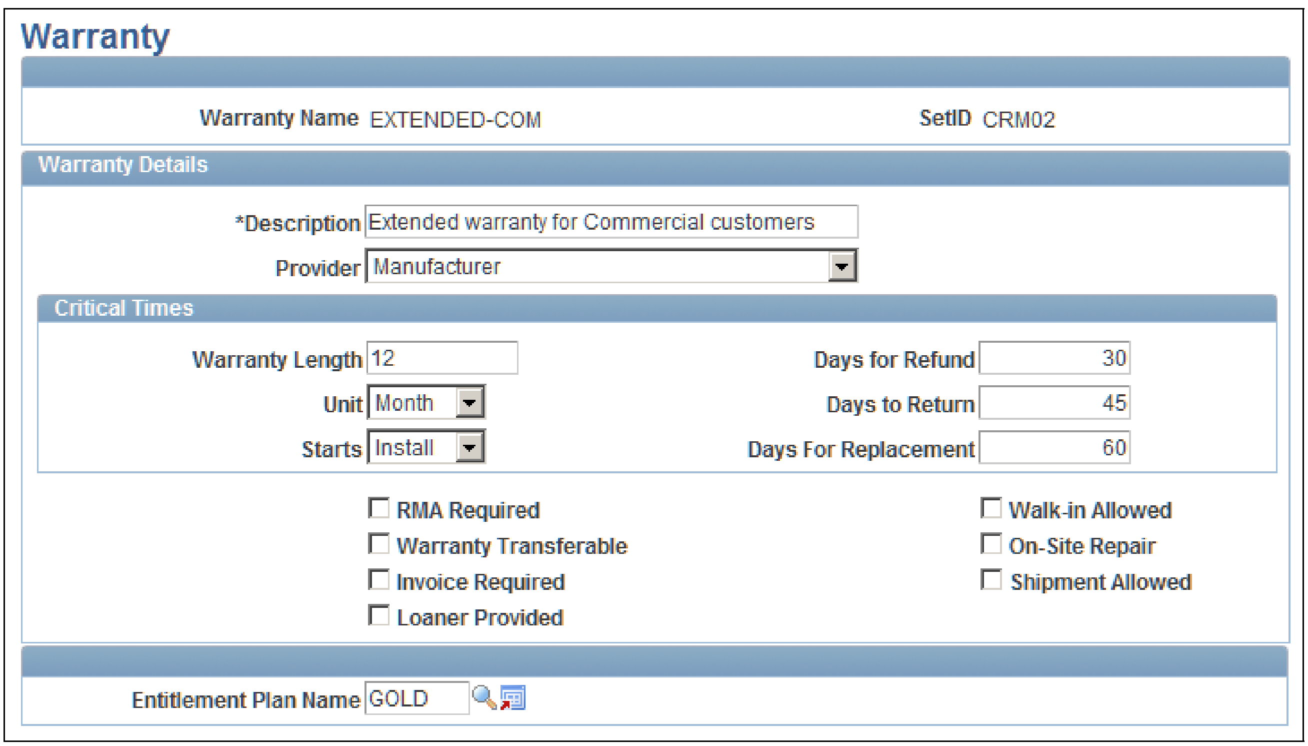
Chapter 28, "Performing Entitlement Searches for Cases and Service Orders," page 557

## Page Used to Define Warranties

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Warranty | RF_WARRANTY | Customer Contracts CRM, Agreements, Warranties, Warranty | Define product warranties. |

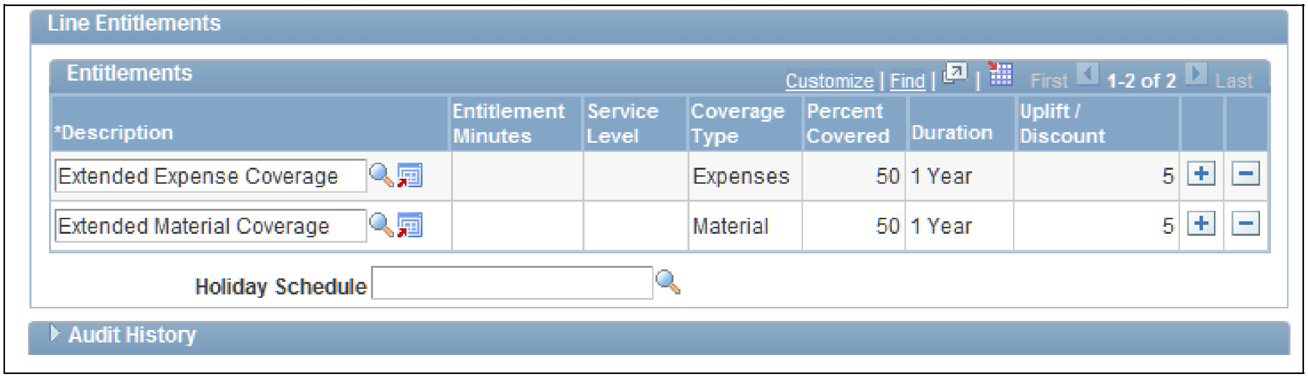
## Defining Warranties

Access the Warranty page (Customer Contracts CRM, Agreements, Warranties, Warranty).




Warranty page (1 of 2)




Warranty page (2 of 2)

### *Warranty Details*

| | |
|---|---|
| **Provider** | Select the organization that absorbs the cost of the services that are covered by the warranty. Options include: *Manufacturer, Retailer,* or *Service Organization.* |

### *Critical Times*

This section details the periods of coverage for the warranty. If an installed product is under warranty, its default start date is determined by the ship date, installation date, or order date of the installed product, as applicable. The CRM system calculates the end date by adding the warranty length to the start date.

| | |
|---|---|
| **Warranty Length** | Enter a number value to represent the length of the warranty. |
| **Unit** | Select the time unit of measure for the warranty period. The values are: *Day, Month, Week,* or *Year.* |
| **Starts** | Select when warranty coverage begins.<br>*Install:* Coverage begins the date when the item is installed at the customer site.<br>*Order:* Coverage begins the date when the item is ordered.<br>*Ship:* Coverage begins the date when the item is shipped to the customer. |
| **Days for Refund, Days to Return,** and **Days For Replacement** | Enter the number of days from the date in the Starts field during which the customer is entitled to return the item for a full refund, return the item to receive credit for the price of the item, or return the item in exchange for a replacement item. |

Use the check boxes in the center of the page to indicate, for informational purposes, how warranty services are provided.

| | |
|---|---|
| **RMA Required** (return material authorization required) | Select if installed products under warranty must be returned for warranty services by using RMA processing. |

| | |
|---|---|
| **Walk-in Allowed** | Select if the customer can bring installed products under warranty to your repair center. |
| **Warranty Transferable** | Select to keep the warranty in effect for the new owner if ownership of the installed product changes. |
| **On-Site Repair** | Select if installed products under warranty can be serviced at the customer's site. |
| **Invoice Required** | Select if the customer must provide a copy of the invoice for an installed product under warranty before warranty services can be performed. |
| **Shipment Allowed** | Select if the customer can ship installed products under warranty to your repair center. |
| **Loaner Provided** | Select if the customer will be loaned a similar item while the installed product under warranty is being repaired. |
| **Entitlement Plan Name** | Select a default entitlement plan from the Entitlement Plan Name field to initially populate the grid with a predefined set of entitlements. |

### *Entitlements*

Use this section to add or delete entitlements from this set as necessary. Entitlement plans are established on the Entitlement Plan Setup page. You can also manually enter all entitlement entries into the Entitlements grid without entering an entitlement plan name to pre-populate the grid.

If you do not provide warranty service on holidays, select the holiday schedule that applies to your company's hours of operation. The system uses this information to calculate start and end dates for service.

***Warning!*** If you change the entitlements that are offered by an existing warranty, you also change the entitlements for any installed product that is covered by the warranty. When a warranty has been associated with an installed product, you should not modify the warranty definition on the Warranty page. Instead, define a new warranty with the required entitlements and update the warranty information on the Item Definition page.

The CRM system displays the information that is associated with set of entitlements as defined on the Entitlements page.

***See Also***

Chapter 15, "Defining Holiday Schedules," page 249

Chapter 26, "Setting Up and Managing Agreements and Warranties," Understanding Agreements and Warranties, page 479

Chapter 26, "Setting Up and Managing Agreements and Warranties," Defining Entitlements, page 497

Chapter 26, "Setting Up and Managing Agreements and Warranties," Defining Entitlement Plans, page 500

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

# Generating Sales Leads for Agreement Renewal

This section provides an overview of lead generation for agreement renewal and discusses how to set it up

**Note.** This feature is only available to customers that have licensed PeopleSoft Sales and PeopleSoft Integrated FieldService.

## Understanding Lead Generation for Agreement Renewal

To help you sustain company revenue and be proactive about contract renewals for the established customer base, set up PeopleSoft CRM to retrieve agreements that are expired or about to expire and generate sales leads for them. Like other leads, the leads that are created for agreement renewal appear on the Search Leads page for the sales team with *Agreement* as the lead source.

### *Lead Generation for Expiring and Expired Agreements*

PeopleSoft CRM uses an Application Engine (AE) program, which runs on a daily basis (recommended setting) to look for agreements that are about to expire or have recently expired (based on the number of lead days that are defined by the user) and create leads for them.

When the AE program runs, it searches for agreements that are associated with the sales business unit that is specified on the run control page. Because sales leads are keyed by business unit and agreements are keyed by setID, the CRM system performs a business unit-setID mapping exercise in the background to determine which setID corresponds to the selected sales business unit. All agreements in that setID are processed, and all leads that are subsequently created will belong to the specified sales business unit.

**Note.** Only agreements with the status of *Available* are selected by the AE program for evaluation. The AE program does not process agreement templates.

Among all available agreements in the given setID, the AE program generates sales leads for those whose expiration date falls between the start and end dates of a time period that is calculated by using the user-defined lead time. The start and end dates are calculated using this formula:

(Start Date) = (Current Date) - (Agreement Renewal Lead Time)

(End Date) = (Current Date) + (Agreement Renewal Lead Time)

For example, the AE program is scheduled to run today on October 15, and the lead time (in number of days) that is defined at the installation level is 7. For any agreement with an expiration date between October 8 through October 22, a sales lead is generated by the lead generation process.

When you look up a sales lead for agreement renewal from the Search Leads page, agreement-specific information, such as agreement code and renewal number, is available on the Source tab as a reference. You can also transfer to the read-only version of the agreement from the lead.

For agreement renewal purposes, an agreement can only be associated with one sales lead at a time. The agreement is not selected by the AE program if a sales lead was already generated for it. In addition, the CRM system does not generate sales leads for agreements that are already renewed.

## Setting Up Lead Generation for Agreement Renewal

This section discusses how to:

- Define lead time for generating leads.
- Generate leads for expiring agreements.
- Access leads that are generated for agreements.

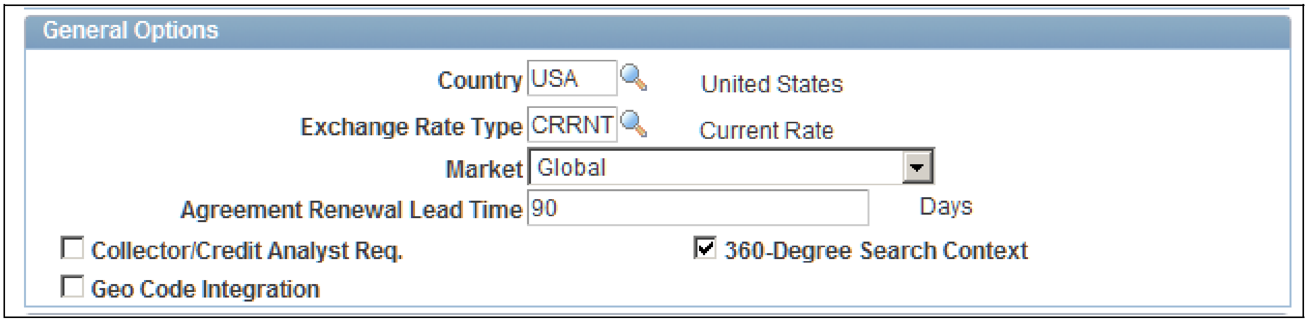
## Pages Used to Set Up Lead Generation for Agreement Renewal

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| General Options | RB_INSTALLATION | Set Up CRM, Install, Installation Options, General Options | Define how many days before or after an agreement expiration date that a sales lead should be generated. |
| Sales Lead Generation for Agreement Renewal | RUN_CNTL_RFLEAD | Customer Contracts CRM, Agreements, Lead Generation, Sales Lead Generation for Agreement Renewal | Start a batch process that runs on a daily basis (recommended) to generate sales leads for agreements that are about to expire or have recently expired. |
| Lead - Discover | RSF_LEAD_ENTRY | Sales, Search Leads, Discover | Access sales leads that are generated for agreements. |

## Defining Lead Time for Generating Leads

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



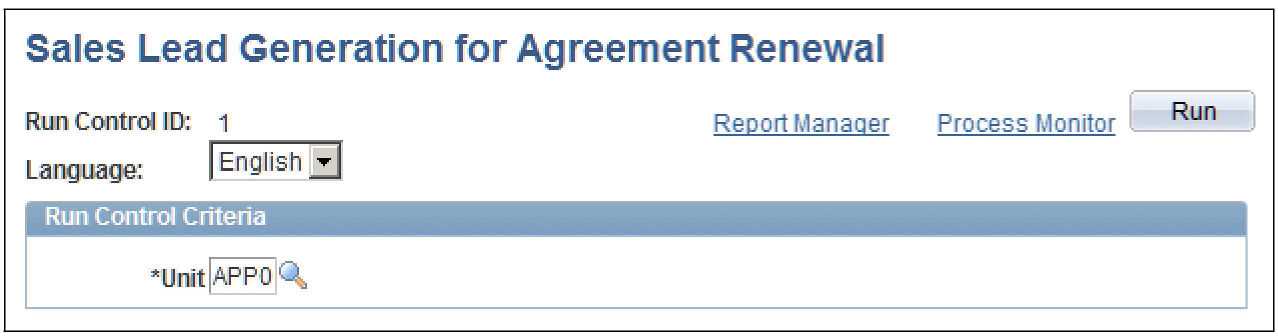

General Options page: General Options section

In the Agreement Renewal Lead Time field, enter the number of days before expiration that an agreement is eligible for the lead generation process. This is also the number of days after expiration that the agreement is still eligible for the process. By default, this value is set to *90* days.

See  and Chapter 3, "Setting Up General Options," page 21.

## Generating Leads for Expiring Agreements

Access the Sales Lead Generation for Agreement Renewal page (Customer Contracts CRM, Agreements, Lead Generation, Sales Lead Generation for Agreement Renewal).




Sales Lead Generation for Agreement Renewal page

Select a sales business unit for which leads will be created for expiring agreements after the AE program (RF_AGR_LEAD) is run.

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**Note.** The AE process should be run on a daily basis.

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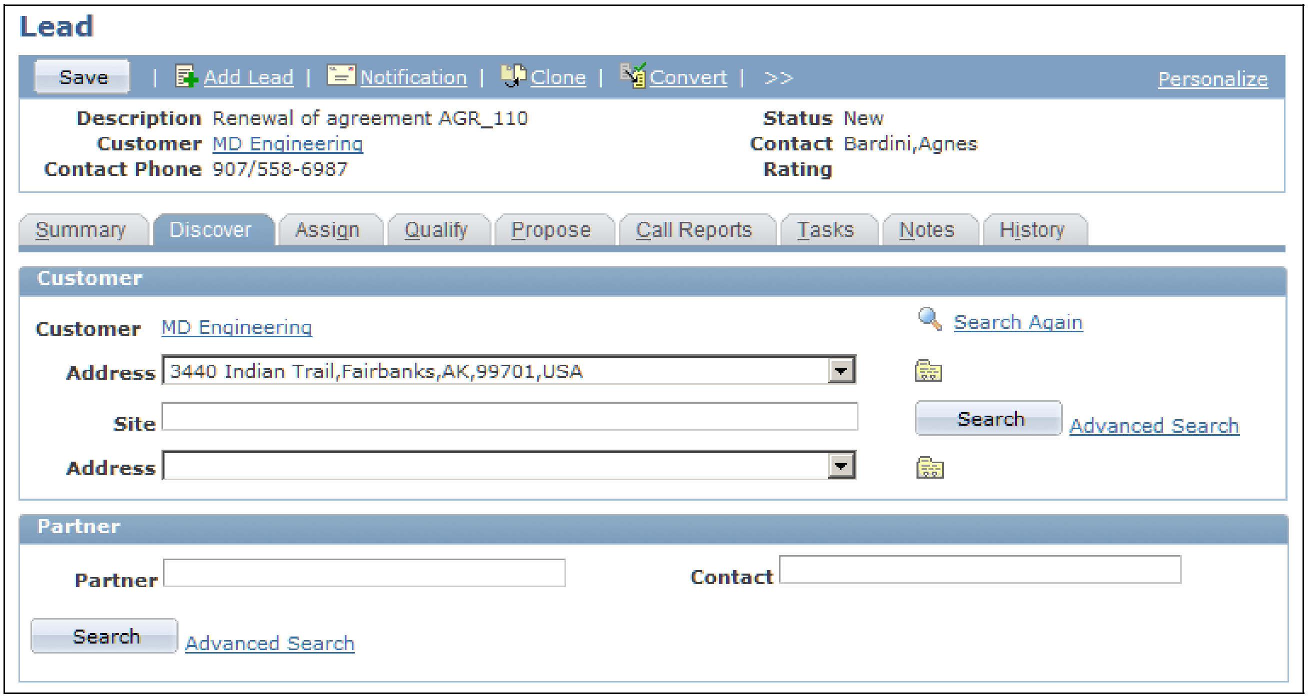
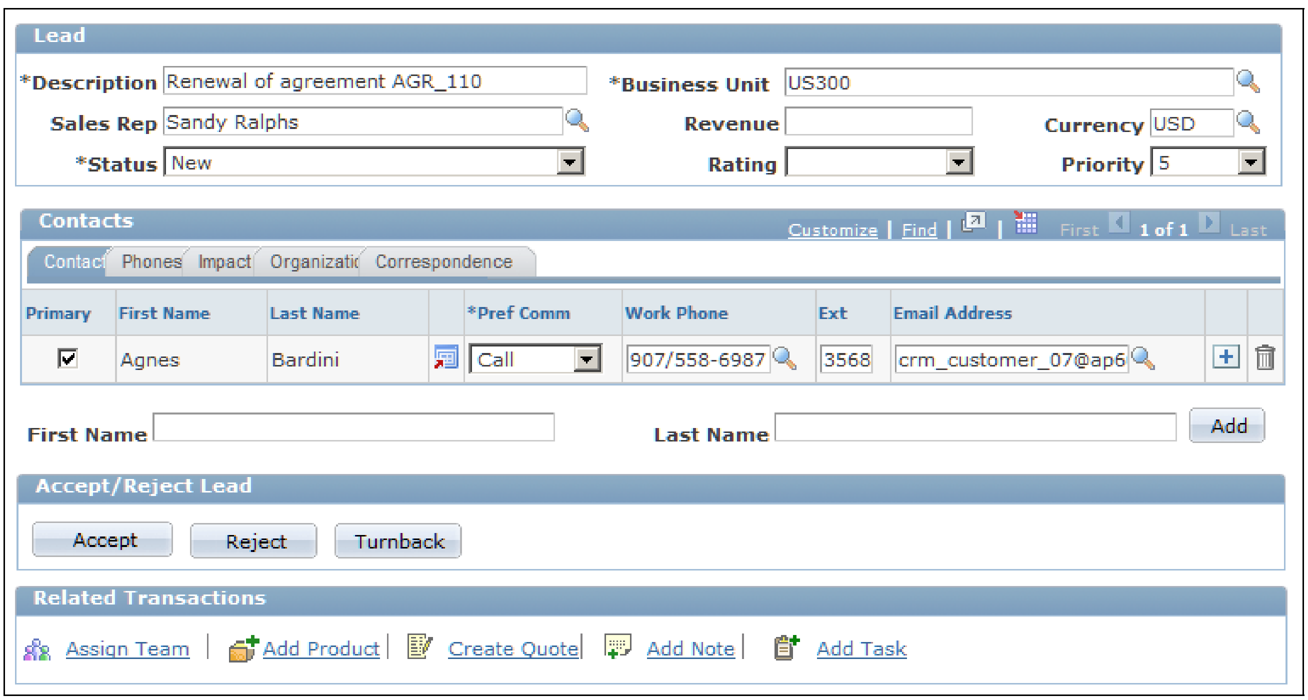
## Accessing Leads That Are Generated for Agreements

Access the Lead - Discover page (Sales, Search Leads, Discover).




Lead - Discover page (1 of 2)




Lead - Discover page (2 of 2)

Open a sales lead that is generated for agreement renewal purposes. You can click the Agreement link to access the agreement that needs to be renewed. The name of the agreement is listed is part of the lead name.

### See Also

*PeopleSoft Sales 9.1 PeopleBook*, "Creating Sales Leads and Opportunities"

Chapter 27

# Defining Pricing Information for Services and Support Offerings

This chapter provides an overview of pricing records and discusses how to establish pricing records.

## Establishing Pricing Records

This section provides an overview on pricing records and discusses how to establish pricing records.

### Understanding Pricing Records

This section discusses:

- Pricing records.
- Types of pricing records.
- Products, services, and service activities on pricing records.
- Pricing records for each currency.
- Purchase options.
- Pricing structures on agreements.

#### *Pricing Records*

You use the Pricing Information component in PeopleSoft CRM to define pricing records for service and support offerings. The system uses the pricing structure that you define to calculate prices on agreements.

When you are creating service orders and cases, you can use the Pricing Information component to look up the price for work not covered by an agreement, such as on-demand service or support calls, or an additional service activity that is not included in the service on the customer's agreement. The system, however, automatically populates the price defined on the Pricing page for the transaction.

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**Note.** With the pricing records that you define in the Pricing Information component, PeopleSoft CRM can calculate agreement prices. It can also price on-demand transactions for cases and service orders as well as service fees.

---

### Types of Pricing Records

You can define pricing records for these types of transactions:

- Agreements
- Agreement services
- Agreement cases
- On-demand services
- On demand cases

Agreement pricing records define the fee that the customer pays for an agreement that covers a specific service or support offering. The agreement price is paid when the agreement is issued to or signed by the customer. In addition, PeopleSoft CRM supports the ability to pay for the agreement on a recurring basis.

Agreement service or case pricing records define what the customer pays when the work that is associated with the service or support offering on the agreement is performed.

On-demand pricing records define the amount that a customer pays for services or support offerings that are not covered by an agreement. Typically, on-demand prices are higher than agreement services prices. By purchasing an agreement, the customer may receive a discount on the normal price of a service or support offering.

### Products, Services, and Service Activities on Pricing Records

The prices that you define for agreements, agreement services, agreement cases, on demand case and on-demand service pricing records can define rates for a service, a product, or both a service and a product. Pricing records that only specify products are used by call centers to define rates for supporting specific products and are identified as an agreement case or an on-demand case. Field service organizations define pricing records for a service or for a combination of a service and a product and are identified as agreement service or on-demand service.

When calculating pricing on an agreement, the system checks first for a price for the service-product combination. If none is defined, the system uses the price that is defined for the service alone. For support-based agreements, the agreement price is based on prices defined for products only.

You can also define rates for service activities and combinations of products and service activities. These pricing records enable you to adjust a customer's invoice when he or she requests additional service activities that are not included in the service.

For example, at the time that a customer requests a service that is covered by an agreement, you might want to offer the ability to upgrade the service by adding additional service activities to the basic service that is covered by the agreement. You can define a fee for each service activity that the customer adds to the basic service. Note that you can define a pricing record for a service or a service activity, but not both.

### Pricing Records for Each Currency

Every pricing record defines a rate in a specific currency. You must define a complete set of pricing records for each currency that is valid for agreement, agreement service, agreement case, on demand case and on-demand service transactions in your business. When you create an agreement, you can reference the pricing records for only one currency.

### *Purchase Options*

You can define prices for these types of purchase options:

- Flat
- Prepaid
- Time and material

A flat purchase option specifies a set price for a service or support offering on an agreement, an agreement service, or an on-demand service pricing record. A flat rate for an agreement is expressed in a time-based unit of measure, such as hours, days, weeks, months, or years.

For an agreement service, on-demand service, agreement case, or on-demand case, flat rates are expressed in units of work, such as per case or per service order. The flat rate is expressed as an amount to be paid for each installed product that is covered by that service. For example, if a flat rate is defined as 100 USD per year for a service, and the agreement line that references that service has two installed products, the line price would be calculated as 200 USD for one year.

With the prepaid purchase option, customers pay for a specified quantity of a service or support offering at the time that they purchase the agreement. The prepaid purchase option applies only to agreement pricing records. You define a price for a set quantity of cases or service orders, or a price for a certain number of hours worth of work.

You may define different prices for the same service or service-product combination for different prepaid quantities; for example, 100 USD per service order when prepaying 20 service orders, and 90 USD per service order when prepaying 50 service orders. The prepaid quantity of cases or service orders is saved on the agreement, and the value is decreased when a case or service order is created to account for the consumption.

If the case or service order is subsequently canceled, the quantity is added back to the agreement. If the prepaid quantity is in units of hours, the system decreases this quantity each time a technician or agent reports time that is spent (total hours) on a service order or case that is covered by the agreement line.

The time and material purchase option defines a rate for the labor time that is required to perform the requested work. This rate is always expressed as a time-based unit of measure and applies only to agreement and on-demand service and case pricing records. Material is not directly accounted for by the time and material purchase option. However, you can track material usage for service orders and manually account for the material when creating the customer's invoice.

This table summarizes the valid data combinations on a pricing record and provides an example for each combination:

| ***Applies To*** | ***Purchase Option*** | ***Unit*** | ***Prepaid Quantity*** | ***Example*** |
|---|---|---|---|---|
| Agreement | Flat | Time-based (hour, day, week, month, year). | Not allowed | 200 USD per year. |

| Applies To | Purchase Option | Unit | Prepaid Quantity | Example |
|---|---|---|---|---|
| Agreement | Prepaid | Case, service order, or hour. | Required | 30 USD per service order for a prepaid quantity of 15. |
| Agreement service/case | Time and material | Time-based (hour, day, week, month, year). | Not allowed | 40 USD per hour. |
| Agreement service/case | Flat | Case or service order. | Not allowed | 45 USD per service order/case. |
| On-demand service/case | Flat | Case or Service order. | Not allowed | 55 USD per service order/case. |
| On-demand service/case | Time and material | Time-based (hour, day, week, month, year). For cases it's only hour. | Not allowed | 75 USD per hour. |

### *Pricing Structures on Agreements*

On agreements, you can set up pricing structures that use various combinations of pricing records.

For example, your business might offer a five-year preventive maintenance (PM) service agreement for air conditioners. For an agreement price of 500 USD, a service technician will perform preventive maintenance tasks on a customer's air conditioner for five years.

For customers who buy this agreement, you also offer repair services for 75 USD per service call—a 50 percent discount off your on-demand rate. To support this agreement scenario, you define an agreement pricing record with a flat purchase option for preventive maintenance service of 100 USD per year. You also define an agreement service pricing record for your air conditioner repair service for a flat rate of 75 USD per service order. Your on-demand pricing record for the same service would be 150 USD.

After defining your pricing records, you create an agreement with a five-year duration that references the agreement and the agreement service pricing records. The customer who buys the agreement pays 500 USD and receives preventive maintenance service for five years. If the customer's air conditioner requires repair services, the customer pays 75 USD per repair service order for the duration of the five-year agreement.

---

**Note.** Prepaid quantity is a fixed amount per contract, not per year. In this case, if someone were to prepay for 10 PM visits (regardless of agreement duration), you can define a prepaid price of 50 USD per service order for a quantity of 10 service orders. An alternate arrangement would be to define a flat rate of 100 USD per year for unlimited PM service. For a five-year agreement, this would cost 500 USD for unlimited PM service.

---

### *See Also*

Chapter 26, "Setting Up and Managing Agreements and Warranties," page 479

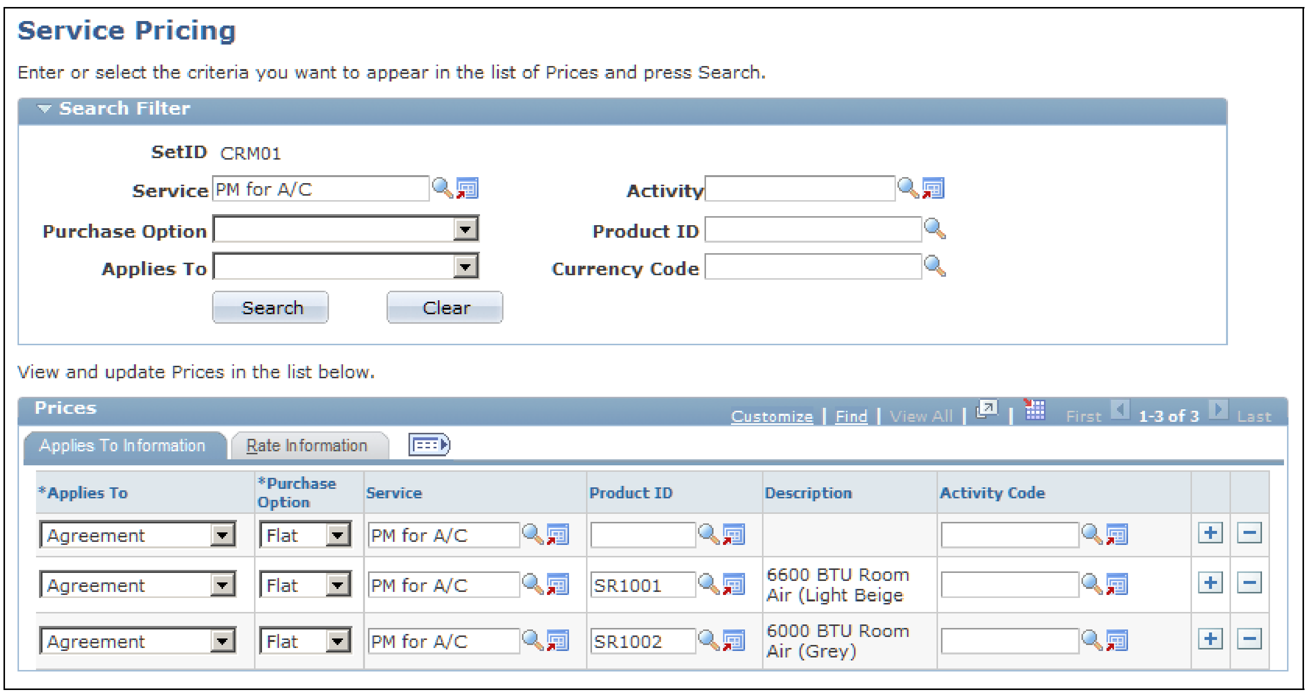
## Page Used to Establish Pricing Records

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Service Pricing | RF_SVC_PRICE | Pricing Configuration, Service Pricing, Service Pricing | Establish pricing records for service and support offerings. |

## Establishing Pricing Records

To establish pricing records, use the Service Pricing (RF_SVC_PRICE) component.

Access the Service Pricing page (Pricing Configuration, Service Pricing, Service Pricing).




Pricing Information page

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**Note.** To establish pricing for products that you sell, use the Price page under Products CRM. Also, material costs for items are stored in the inventory system.

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### Search Filter

Select pricing information that meets a specific set of criteria. Enter the criteria and click the Search button. If you click the Search button without specifying any criteria, the system returns all pricing records that are defined for the setID.

**Service**

Select a service to limit the search to pricing records that are defined for a specific service. You define services by using the Services component. Click the Transfer to Service button to access the Services component. Services are not relevant to pricing for support agreements.

**Activity**

Select a value to limit the search to pricing information that is defined for a specific service activity. You use the Service Activity Code page to define activities. Click the Transfer to Activity button to access the Service Activity Code page.

**Note.** Search criteria can include a service or an activity, but not both. These fields are mutually exclusive on the pricing record.

**Purchase Option**

Select a value to limit the search to pricing records for the specific purchase option:*Flat, Prepaid,* or *T&M* (time and material).

**Product ID**

Select a value to limit the search to pricing records for specific product. You establish products in PeopleSoft CRM by using the Product EIP or the Product Definition component.

**Applies To**

Select a value to limit the search to pricing records for the specific applies to option: *Agreement, Agreement Case, Agreement Service,On Demand Case,* or *On Demand Service.*

**Currency Code**

Select a value to limit the search to pricing records for a specific currency. You establish currencies on the Currency Code page.

### Prices

The system displays the pricing information records that meet the search criteria.

### Applies to Information

**Applies To**

Select the transaction that the pricing record applies to: *Agreement, Agreement Case, Agreement Service,On Demand Case,* or *On Demand Service.*

 

| | |
|---|---|
| **Purchase Option** | Select the purchase method for the service or support offering: *Flat, Prepaid,* or *T&M* (time and material).<br><br>The *Prepaid* option applies only to pricing records for agreement transactions.<br><br>The *T&M* option applies only to pricing records for agreement service, agreement case, on demand case and on demand service transactions. |
| **Service** | Select the service that the pricing applies to, if applicable. You use the Services component to define services. Click the Transfer to Service button to access the Services component. Services are not relevant to pricing for support agreements. |
| **Product ID** | Select the product that the pricing record applies to, if applicable. Click the Transfer to Product button to access the Products component.<br><br>If you specify both a product and a service on a pricing record, the price applies only to that particular service-product combination. Pricing records that only specify products are used only by call centers to define rates for supporting specific products. |
| **Activity Code** | Select the service activity that the purchase option applies to. You can define pricing records for service activities or combinations of service activities and products. You can define a pricing record for a service or an activity, but not both.<br><br>You can use service activity price information to adjust a customer's invoice when activities are added to a service that is covered by an agreement. The system displays the information on the Billing page for the service order or case. |

### *Rate Information*

| | |
|---|---|
| **Currency Code** | Select the currency of the rate amount. You must define a complete set of pricing records for service and support offerings for each currency that you use. |
| **Rate Amount** | Enter the amount that is charged per the specified unit in the specified currency. |
| **Unit** | Select the unit of work that is associated with the rate amount. Depending on your Applies To and Purchase Option field selections, you can specify a rate for the following work units: *Day, Hour, Month, S.O.* (service order), *Case, Week,* or *Year.* |
| **Prepaid Quantity** | Enter the number of work units of a service or support offering that a customer pays for in advance. This value applies only to the *Prepaid* purchase option. |

 

### *See Also*

Chapter 27, "Defining Pricing Information for Services and Support Offerings," Understanding Pricing Records, page 549

*PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Setting Up Products"

Chapter 26, "Setting Up and Managing Agreements and Warranties," page 479

*PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Setting Up Services"

*PeopleSoft Inventory 9.1 PeopleBook*

 

## Chapter 28

# Performing Entitlement Searches for Cases and Service Orders

This chapter provides an overview of entitlement searches and discusses how to perform searches.

## Understanding Entitlement Searches

This section discusses:

- Entitlement searches.
- Minimum information that is required to perform entitlement searches.
- Warranty matches.
- Agreement matches.
- Service level suspensions for PeopleSoft HelpDesk.
- Delay Notifications.
- Workflow.

### *Entitlement Searches*

Entitlements define what a customer is contractually owed for the service or support offering on an agreement line or warranty. When you perform an entitlement search on the Service Order page or Case page, the system searches for valid agreement lines or warranties that cover the work on the service order or case and displays the associated entitlements.

The system uses the values that you entered in the fields for product ID, serial number, service, and either site or site identification number (SIN) to search for agreement line and warranty matches for service orders. For cases, the system uses the same fields (with the exception of service) as well as those for contact or personal identification number (PIN).

For support cases, the system passes customer, contact, product ID, serial number, case ID, PIN, SIN, and site as the search criteria for entitlement searches.

For help desk cases, the system passes employee, case ID, product, asset tag, priority, source, department, location, employee role (defined as manager level in the Worker component), and person type (employee, contingent worker, or person of interest) to the search. Additionally, for employees and contingent workers, the employee status is passed to the search.

 

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**Note.** If the internal agreement search option is set to *Match Using Case Criteria,* the system additionally passes priority, source, department, location and employee role information to PeopleSoft HelpDesk searches, depending on the values that are set on the Agreement Search Configuration page. Likewise, if the external case agreement search option is set to *Match Using Case Criteria*, the system additionally passes case category, priority, source, type, and customer value information to PeopleSoft Support entitlement searches, depending on the values that are set on the Agreement Search Configuration page.

---

If the system renders more than one warranty or agreement line that match the available search criteria, you can select the appropriate one from the entitlement match list that is generated by the system. When you make a selection, or if the CRM system finds only one match, the entitlement information of the selected agreement line or warranty is automatically populated to the service order or case. You can view the entitlement details directly on the service order or case.

### *Minimum Information That Is Required to Perform Entitlement Searches*

Before you perform an entitlement search, you must provide a customer or employee that is associated with a case or service order. Additionally, the case search uses the case ID plus one of the following: contact, PIN, site, or SIN. The product ID and serial number or asset tag number are optional but are recommended because they focus the search to a much greater degree.

For entitlement searches on service orders, you need to provide a site ID or SIN in addition to the customer. You can further limit the search by entering a product ID (or the installed product ID, which is identified by the serial ID on the service order), or a service.

When entering information on the case or service order, the system uses the product ID that you enter to select the appropriate installed product records for the customer. If you do not enter enough information to uniquely identify an installed product, all the matching entitlements are returned.

### *Warranty Matches*

If you enter an installed product on the service order or support case, the system checks for a valid warranty that applies to the installed product. The system identifies the installed product by using the serial number that appears on the case or service order.

When an installed product is specified on the service order or support case, the system checks for the following conditions:

- The installed product is associated with a warranty.
- The current date is equal to or later than the warranty start date.
- The current date is equal to or prior to the warranty end date.
- The status of the warranty is *Active.*

If all conditions are met, the system returns the warranty as a match. The system does not return, and you cannot select, warranties from searches for a PeopleSoft HelpDesk case.

### *Agreement Matches*

The CRM system searches for agreement line matches in addition to any warranty matches that are found. For an agreement line to be considered for the entitlement search, the current date must fall on or between the start and end dates on the agreement line, the agreement line must have a status of *Active,* and the agreement itself must have a status of *Active.*

The customer who is listed on the service order or support case must match the customer who is identified on the agreement.

The internal PeopleSoft HelpDesk agreement always applies to all employees, except when the user has selected *Match Using Case Criteria* on the Agreement Search Configuration page for internal agreements and has applied the various rules to individual agreement lines to limit the applicability of those lines to certain groups of employees based on role or department. The administrative contact on the header page for the internal agreement is NOT the worker for whom the agreement applies.

If a SIN is entered, the CRM system returns all agreement lines whose site matches the site linked to that SIN on agreements with a scope of *Site.* If a site ID but not a SIN is provided, the system returns all agreement lines that match the site ID.

---

**Note.** On a case in which a site ID was previously selected, the CRM system limits the selection of installed products to those that are specified for that site. On a service order in which a site ID was previously selected, the system limits the selection of products and installed products to those that are available to the selected site only.

---

If you enter a PIN, the system returns all agreement lines whose contact (named caller) matches the PIN on agreements with a scope of *Contact.* If a contact but not a PIN is provided, the system returns all agreement lines where the contact is listed as the named caller.

Note that field service agreements only use authentication by site or SIN (not by named callers). Therefore, no PIN field exists on the service order, and the contact's person ID is not matched against PIN entries in agreements.

If an installed product is identified on the case or service order, the system returns all agreement lines that list the installed product as a product under service. Agreement lines that cover the corresponding product ID and do not list individual installed products (for example, agreement lines that provide blanket coverage) are also returned.

---

**Note.** The Agreement Search Configuration page enables you to choose the rules on how you want the system to return lines for agreement searches. For PeopleSoft Support, Integrated FieldService, and HelpDesk you can enable the system to search for agreements based on the shortest or longest response times; or let the user select from all matches. Additionally, for PeopleSoft HelpDesk and Support, you can set up specific rules by which the system will search for agreements by matching on additional criteria.

---

### *Service Level Suspensions for PeopleSoft HelpDesk*

When a service level agreement (SLA) cannot be met for justifiable reasons, an agent using PeopleSoft HelpDesk can change a case to the *On Hold* status. In this situation the system sends a suspension notification to the agent's manager. This also applies to PeopleSoft Support.

The system stops the clock for the service agreement and clears the response and restore dates and times. When the case is activated again, the agent or manager changes the case status back to *Open.* When this happens the clock resumes from where it left off and the response and restore dates and times are recalculated to reflect the on hold period.

To facilitate these processes, PeopleSoft delivers these notifications and workflow exceptions:

### *Delay Notifications*

When the agreement is applied, the system sends out a delayed notification to remind the agent, provider group, or call center manager of a potential SLA delay. PeopleSoft delivers these notifications as sample data:

- Response
    - Based on delayed percentage configured through AAF, the system sends a notification to the agent regarding initial response if it's not met yet. If no agent is assigned to the case, the system sends notification to the provider group. If no provider group is defined on case either, the system send notification to the call center manager.
    - When the delay reaches 100 percent of the response time, the system sends a notification to the agent and manager regarding the response exception and sets the service agreement response met flag to *No.*
- Restore
    - Based on delayed percentage configured through AAF, the system sends a notification to the agent warning of potential service agreement exceptions (the same change as response.)
    - When the delay reaches 100 percent of the restore time, the system sends a notification to the agent and manager regarding the restore exception and sets the service agreement restore met flag to *No.*

### *Workflow*

This is general workflow delivered for SLA, not workflow exceptions. The CRM system delivers these workflows as system data:

- SLA Start

  When a case is associated with a service agreement or warranty, the system triggers an SLA start event to create an event history entry with an agreement code or warranty name.

- Delayed Notification

  When service starts, the system schedules delayed notifications. The system sends an initial notification to the agent, provider group, or call center manager regarding call back or warning of potential exceptions. When you first install your CRM application, PeopleSoft delivers 90% delayed notification. The system sends out a notification when the case is not responded to and is past 90% of the customer's entitled response. You can, however, percentage easily configure this percentage in AAF.

- SLA Response Met

  When a case is responded to within the entitled response time, the system triggers an SLA Response Met event and creates an event history record.

- SLA Restore Met

  When a case is closed within the entitled restore time, the system triggers an SLA Restore Met event and creates an event history record.

- SLA Response Exception (Application Engine process)

  This workflow exception is scheduled as a delayed Application Engine process when service starts. When the service response is not met, the system wakes up the Application Engine program. The program calls the component interface (CI) to set the response met flag to *No,* and then triggers the SLA Response Exception workflow.

- SLA Response Exception (workflow)

  When the response met flag is set to *No,* the system sends a notification to the agent and manager and inserts a record into event history.

- SLA Restore Exception (Application Engine process)

  This workflow exception is scheduled as a delayed Application Engine process when service starts. When a case is still open at the time restore is reached, the system wakes up the Application Engine program. The program calls the CI to set the restore met flag to *No,* and then triggers the SLA Restore Exception workflow.

- SLA Restore Exception (workflow)

  When the restore met flag is set to *No,* the system sends a notification to the agent and manager and inserts a record into event history.

- SLA Change

  Users with the change privilege can open the case, clear the service agreement, change the search criteria (changing priority or source is mainly for PeopleSoft HelpDesk users). For PeopleSoft Support and helpdesk, users with privilege can clear the SLA, change other items, and reattach the SLA. Additionally, they can attach another service agreement based on the new criteria. This workflow event triggers the SLA Change workflow to create an event history entry indicating a new service agreement code. As such, a new service agreement cycle starts. The system also cancels any outstanding service agreement exception workflows and triggers the rescheduling of the service exception. The user can detach the SLA in the SLA section for a case. PeopleSoft delivers sample data so that only call center managers and help desk managers can detach an SLA.

- SLA Suspension

  When an agent changes a case status to *On Hold,* the system triggers an SLA Suspension event. The system sends a notification to the manager. It also cancels any outstanding delayed notifications and service exception workflows.

- SLA Resume

  When a manager declines the service agreement suspension or the case is ready to be worked on again, the manager or agent changes the case status from *On Hold* to an *Open* status. The system triggers an SLA Resume event to reschedule service exception workflows.

When a case is not assigned to any agent, a notification is sent to the provider group on the case. If there is no provider group, a default provider group on the Business Unit Setup page is used for notification.

### See Also

Chapter 26, "Setting Up and Managing Agreements and Warranties," Configuring the CRM System for Agreement Searches, page 502

Chapter 26, "Setting Up and Managing Agreements and Warranties," page 479

*PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Managing Cases"

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

## Performing Entitlement Searches

This section discusses how to search for and view agreements and warranties

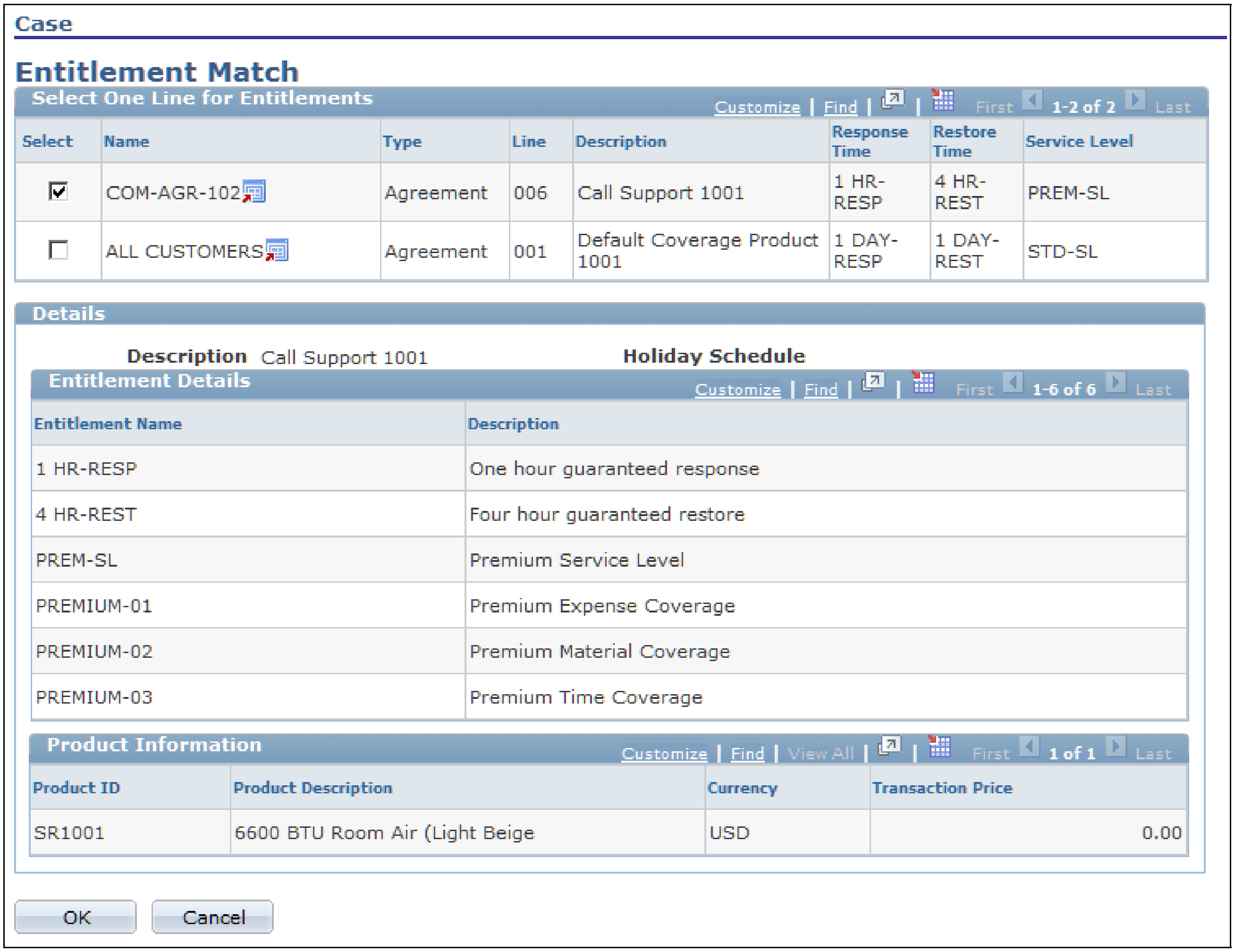
## Pages Used to Perform Entitlement Searches

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Entitlement Match | RF_ENTL_LIST_SEC | • From the Case or Service Order page, click the Select Agreement or Warranty link.<br>• For PeopleSoft HelpDesk cases, select the Select Agreement link from the Case page. | View and then select the entitlements defined on the agreement line or warranty that cover the service on a service order or the support offering on a case. This page appears only if multiple agreement lines or warranties meet the entitlement search criteria. |

## Searching for and Viewing Warranties and Agreements

Access the Entitlement Match page (from the Case or Service Order page, click the Select Agreement or Warranty link).




Entitlement Match page

The system displays agreements and warranties that meet the entitlement search criteria that is entered for the service order or case. Select the appropriate agreement line or warranty for the case or service order. The system displays the details for the agreement line or warranty in the Details group box. You can only select one agreement line or warranty.

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**Note.** If you have not saved the service order, you can perform another entitlement search and select a different warranty or agreement line by clicking the Edit button on the Service Order page.

For cases, agents can attach an agreement, but only the manager can detach it once it saved. When an agent selects an agreement on a case, he or she can still perform another search by clicking the Clear link and selecting a different agreement before saving the case.

Once the case is saved, only the manager has the privilege to change the agreement. This is controlled through the rule-based security that is defined in the Display Template Component pages for the Clear field. PeopleSoft delivers help desk manager and call center manager as sample data and provides these user IDs with the ability to detach agreements.

---

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

### *Select One Line for Entitlements*

**Name** and **Type** — Displays the name (agreement or warranty) of the entitlement match. Click the adjacent Agreement or Warranty Transfer button to access the corresponding Agreement or Warranty component.

**Renewal Number** — Displays the renewal number for the agreement. There are no renewals for warranties.

**Line** — Displays the agreement line number that specifies entitlements for the combination of relevant criteria that has been entered on the case or service order.

**Note.** As described earlier in this chapter, the criteria used for identifying agreement lines may include more than just the customer, site, and product ID.

**Description** — Describes the agreement or warranty as it was entered into the system.

**Service** — Describes the service that is associated with the agreement or warranty. Click the Transfer to Service button to access the Service page and view details of the service as it was entered into the system. The system displays this field for PeopleSoft Integrated FieldService only.

### *Entitlement Details*

Lists the entitlements that define the response time, restore time, service level, or coverage that are contractually owed to the customer as defined by the agreement line or the warranty.

### *Product Information*

**Product ID** and **Product Description** — Displays the ID and description of the product

**Currency** — Displays the currency of the transaction price. The system does not display this field for PeopleSoft HelpDesk.

**Transaction Price** — Displays the price of the transaction for receiving support or the specified service for the product (repair, preventive maintenance, and so on). The system does not display this field for PeopleSoft HelpDesk.

**Purchase Option**

Displays the method of purchasing the service or support offering for an agreement or agreement service transaction. The system does not display this field for PeopleSoft HelpDesk.

Options are:

*Flat:* The service or support offering is purchased for a flat fee.

*Prepaid:* A specified number of work units of the service or support offering is purchased in advance. There is no transaction fee for the service or support offering as long as there is remaining quantity for the agreement line.

*T&M* (time and material): The price of the service or support offering per transaction is based on the labor rate.

**Remaining Quantity**

Displays the amount of unused, prepaid quantity. As long as a positive quantity remains, there is no transaction fee for the service order or support offering. For field service agreements, the prepaid quantity is in units of service orders or hours, and the system decreases this quantity by 1 service order or the appropriate number of hours specified in the timelog as billable each time a service order that is covered by the agreement line is saved.

If the service order is canceled, the system increases the appropriate number of hours or remaining quantity by 1. For support agreements, workflow processes must be implemented to update remaining quantity. Lines with zero remaining prepaid quantities are not shown.

---

**Note.** The system makes any agreement line available for selection that has more than one product for which there are some products with a zero prepaid balance and some products that have a positive prepaid balance or do not use the prepaid purchase option. If the user selects that line, the system makes the corresponding detail section with the product lines that have zero prepaid balances unavailable for selection.

---

### *See Also*

Chapter 28, "Performing Entitlement Searches for Cases and Service Orders," Understanding Entitlement Searches, page 557

Chapter 26, "Setting Up and Managing Agreements and Warranties," page 479

## Part 8

# SmartViews



## Chapter 29

# Setting Up SmartViews

This chapter provides an overview of SmartViews and discusses how to set them up to work in PeopleSoft CRM.

## Understanding SmartViews

This section discusses:

- SmartViews framework overview.
- Use of templates.
- Metrics and terms.
- Data storage.
- Audiences and segment groups.
- SmartViews security.

### SmartViews Framework Overview

The SmartViews framework enables you to effectively manage key customer groups in a centralized environment where current customer performance information is shared among authorized users. Use this framework to create a configurable, customer-centric view of the enterprise. Through SmartView templates, you can set metrics to view customer performance or measure it in respect to target values. SmartView users can personalize metrics to view meaningful data about customer segments down to the individual account level. They can also perform predefined actions on customers, such as creating a campaign, a plan, or sending correspondence to communicate the SmartViews with interested parties across the company.

The customer-centric view of the enterprise is a SmartView. It is constructed using two elements:

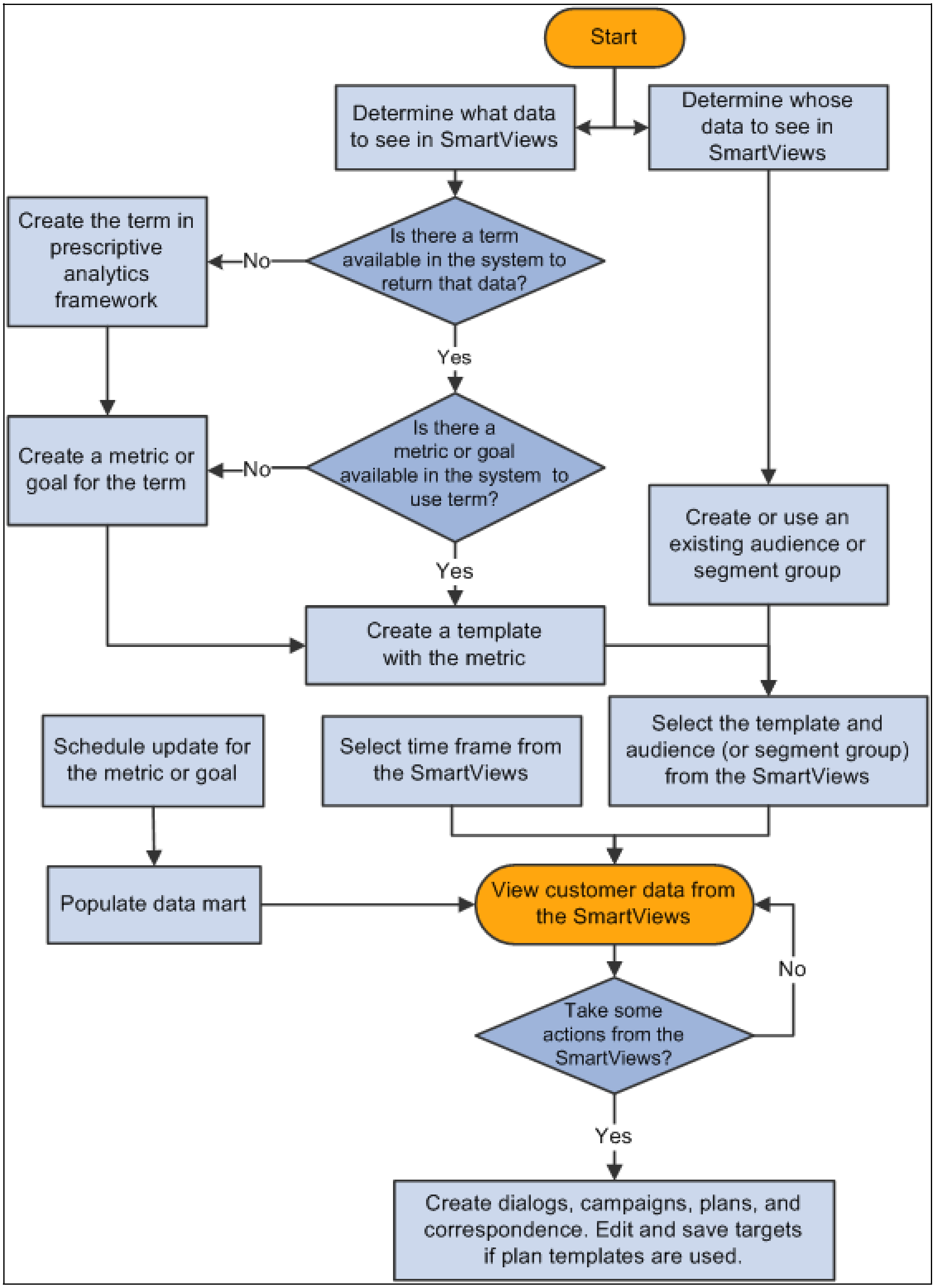
- Templates

  A template dictates what data users are able to see in SmartViews.

- Customers

  Customers are grouped as audiences or segment groups. The SmartViews displays data that pertains to the selected audience or segment group.

This diagram illustrates the high-level process of setting up templates and customers and using these components in SmartViews:




Process flow for setting up and using SmartViews

## Use of Templates

A template determines which data you see in the SmartViews for each selected audience or segment group (collectively) and customers that belong to it (individually). SmartViews operates in these modes:

- *Plan mode* if Strategic Account Planning is licensed.
- *Metric mode* is supported whether or not Strategic Account Planning is licensed.

When creating a template, you reference one or multiple relevant goals or metrics. Each of them is regularly resolved into customer-specific data through a batch process and is displayed on the My SmartViews page at runtime. From there, users can view meaningful information about customer segments or audiences and each of their individual accounts. Goals and metrics are functionally similar, except that goals support target values as well. Users can edit target values directly on the My SmartViews page and view the variance between target and actual values.

If PeopleSoft Marketing is licensed, SmartViews support the use of audiences and segment groups (segments) in the plan and metric modes; otherwise, only audiences are supported. In this case, you would create audiences from the save search feature (for Lead, Opportunity, Person, and Company) because the Manage Audiences component is not available (part of the marketing application).

### Plan Mode

Users can leverage planning templates and goals that are defined for Strategic Account Planning and use them in SmartViews. In the plan mode, users can select segment/audience or account planning templates for the segment group or audience they are viewing. They can modify target values of goals in the SmartViews directly and save the updates in respective plans.

SmartViews can validate a goal target if the goal can be aggregated. When segment/audience type templates are used, users can validate the aggregated target values of the child level against the total value at the audience or segment level. Note that the target value of the audience or the highest-level segment doesn't always equal the sum of its child accounts or segments. This happens typically when users manually update target values and, over time, the numbers don't match.

The system displays a message for each goal that it validates; if the message shows a discrepancy between the total number at the parent level and the sum of target values at its child level, users can modify them accordingly.

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**Note.** No data is displayed in the SmartViews if you choose to view a segment group with an account planning template, because account templates apply to accounts only.

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In the plan mode, the SmartViews displays target values for accounts, audiences, or segments if they belong to plans that are based on the selected template with the same time frame. If values cannot be returned for some reason (for example, there's no plan associated with a particular account or the time periods don't match), the system provides explanatory messages on the SmartViews.

### Metric Mode

SmartViews work like a reporting tool in the metric mode. In this mode, you define metrics (measurements of key performance) and associate them in SmartView templates that you create to monitor customer performance. The metric mode is available whether or not Strategic Account Planning is licensed.

 

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**Note.** Planning templates and goals are not available when Strategic Account Planning is not licensed.

---

When SmartViews are displayed in metric mode, users can see the actual metric values for each segment or account of the selected segment group or audience. Unlike in plan mode, where the status, target values, and variance values can be available if so configured, users don't see this information in the metric mode (with the exception of history variance).

### See Also

*PeopleSoft Strategic Account Planning 9.1 PeopleBook*, "Creating Segment and Audience Plans"

*PeopleSoft Strategic Account Planning 9.1 PeopleBook*, "Setting Up PeopleSoft Strategic Account Planning"

## Metrics and Terms

A metric is a measurement of key performance; for example, lead count, number of products owned, or number of cases. In the definition of a metric (or goal), you specify a term that represents it. The idea of a term comes from the Active Analytics Framework; it's metadata with a user-friendly name and it refers to a piece of information that could either exist physically anywhere in the system or could be derived. It is stored in the data library, which is part of the active analytics framework.

SmartViews run a scheduled batch process to retrieve metric or goal values. This process resolves terms (referenced in metrics or goals) into data that pertains to each account or segment that is displayed on the SmartViews. Users can control which goal or metric and what type of values (for example, actual, history, and target values) to see through the user's personalization.

SmartViews deliver terms for data related to sales, marketing, partners, and wealth management; leverage them when you create new goals and metrics. For a list of terms that are delivered by SmartViews, navigate to Enterprise Components, Active Analytics Framework, Data Library, Manage Terms and search with the context name of Portfolio Segment.

Terms are organized in a tree structure called the subject area. When administrators define metrics and specify SmartViews-specific terms, those terms are available under the SmartViews folder of the Term Selection page.

Take advantage of goals if you license Strategic Account Planning. Goals, if defined to support both planning and SmartViews usage, can be used as metrics in SmartView templates. The difference between using goals in planning templates and SmartView templates is that the setup on target values and assessment in goals doesn't apply to SmartView templates. Therefore, SmartViews don't show target data when users select a SmartView template.

### See Also

Chapter 29, "Setting Up SmartViews," Defining Metrics, page 579

*PeopleSoft Strategic Account Planning 9.1 PeopleBook*, "Measuring the Attainment of Plan Goals," Establishing Plan Goal Metrics

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

## Term Creation: Considerations

For a term to function properly in the SmartViews context, it must have an implementation that is defined for the following context:

- Account Plan - Returns information for a given person. It calculates the information based on the following parameters:
    - BO_ID and ROLE_TYPE_ID - these two parameters define for whom the calculation is intended.
    - START_DATE and END_DATE - these two parameters define the begin and end dates of a period for which the calculation should be made.
    - CURRENCY_CD - this parameter is used by terms of which the return data is currency-based; thus the currency in which the data should be returned.
- Audience/Segment Plan - Returns the information for a given audience or segment. It calculates the information based on the following parameters:
    - SETID and RA_LIST_ID - these two parameters define the audience or segment for which the term should be calculated.
    - SEG_START_DATE - this date defines which segment composition should be used based on the given date.
    - START_DATE and END_DATE - these two parameters define the begin and end dates of a period for which the calculation should be made.
    - CURRENCY_CD - this parameter is used by terms of which the returned data that is currency-based, thus the currency in which the data should be returned.
- Segment Group - Returns the information for a given segment group. It calculates the information based on the following parameters:
    - SETID and RA_SEGMENT_GRP_ID - these two parameters define the segment group for which the term should be calculated.
    - SEG_START_DATE - this date defines which segment composition should be used based on the given date.
    - START_DATE and END_DATE - these two parameters define the begin and end dates of a period for which the calculation should be made.
    - CURRENCY_CD - this parameter is used by terms to return data that is currency-based.
- Portfolio Segment - Used by the Datamart. It calculates all the BO_ID objects for all the currently defined periods based on all the SmartViews and templates selected by the users.
    - SETID and RSP_GOAL_ID - these two parameters define which goal should be calculated.
    - CURRENCY_CD - this parameter is used by terms to return data that is currency-based.

If there are conditions that the term cannot handle, the system can create an exception and pass it to the calling program; for example:

```
throw CreateException(18149, n, "NMG:  Data doesn't exist for this role type.");
```

where *n* is a number greater than 200. Define a message number in message set 18149 with *n* greater than 200.

## Data Storage

SmartViews caches data to facilitate page rendering when the SmartViews is first loaded or subsequently updated. The system provides an application engine (AE) program called RPM_DATAMART that is responsible for retrieving and computing specified goal or metric data and storing it in a predefined data mart.

You can define batch processes to run the AE program on a regular basis; for example, nightly, or every few hours. The system retrieves data from the data mart when metric templates are used. When planning templates are used, data comes from Strategic Account Planning directly.

Among the enabled goals or metrics, the AE program updates those that are included in any template that has been selected by users on the Configure My SmartViews Profile page to view SmartViews, for the specified time period. Each one of them is updated for every member that belongs to the selected audience or segment group as well as the audience or segment groups themselves as a whole.

For example, if there's one selected audience on the Configure My SmartViews Profile page and it has three accounts associated with it, the AE program returns a total of four metric or goal values.

Users can get realtime goal or metric data anytime they're reviewing the SmartViews, if so configured. This functionality applies to actual data for goals whose calculation method is set to *automatic.*

### *See Also*

Chapter 29, "Setting Up SmartViews," Setting Up SmartViews, page 577

## Audiences and Segment Groups

Audiences and segment groups are the two forms of customer groupings that can be referenced on the SmartViews.

### *Audience*

An audience is a logical grouping of customers (accounts) that can consist of contacts for companies or partners, and consumers. Customers in an audience may originate from multiple setIDs depending on how you set up the selection criteria. There are a few ways to create audiences; you can use the audience builder in the Manage Audience component of PeopleSoft Marketing, or configurable search pages of components that enable the creation of audiences, such as Lead, Opportunity, Person and Company. In SmartViews, an audience is represented by consumers and companies or partners to which its contacts belongs.

Compared to the Manage Audience component that bases its audience count on the number of consumers and contacts, the audience count that is displayed in the SmartViews is always equal or fewer because a company or partner often has multiple contacts.

SmartViews display only generated and published audiences. For audiences to be used in SmartViews, they have to meet these conditions before the generation process occurs:

- Must be at the status of *Approved* or *Committed.*

- The Published check box is selected.

See  and *PeopleSoft CRM 9.1 Marketing Applications PeopleBook*, "Using Audiences," Creating and Managing Audiences.

### Segments

A segment is a type of audience, a group of customers as defined by selection criteria. Every segment is associated with a segment group, which represents a multiple-level hierarchy that contains segments, each of which can have its own child segments.

You can define parent-child relationships between segments by referencing the parent segment in the child segment's definition, and each segment is associated with the segment group of its parent. The structure of the lowest level segments is the same as audience, which consists of customers of the same or different roles.

A segment consists of a group of company or partner contacts, or consumers. In most cases, they will be subcategorized and be available among its child segments (if any). In SmartViews and Strategic Account Planning, the customer counts at non-leaf segments are aggregated and become the total count of leaf segments.

Similar to audience, the count that is displayed in segments (in the Segment component) may not match the count that is displayed on SmartViews because the former count is for contacts and the latter is for companies and partners. In the Segment component, if a segment has customers at the parent level and they do not belong to any child segment, they are not included in Strategic Account Planning and SmartViews.

Segments and segment groups are available if you license PeopleSoft Marketing.

For segments to be displayed in the SmartViews as part of their segment group, they need to be generated and published. The same is true with audiences. Segments should be in either the *Approved* or *Committed* status and have the Published check box selected before the generation process starts.

See  and *PeopleSoft CRM 9.1 Marketing Applications PeopleBook*, "Using Audiences," Creating and Managing Audiences.

### Plan Creation in Audiences and Segments

Users can create plans for audiences or segments that are already published on the Plans page of the Manage Audience component, if they are given the proper permission to the plan component. The Plans page doesn't appear if the corresponding audience or segment is not published.

From the My SmartViews page, users can create plans for the audience or segment group that they are looking at. The plan creation action is available once the system verifies that the sign-in user has access to the component. Based on the type of template that is selected, users can choose to create account plans (for *account* templates) or account and audience plans (for *segment/audience* templates). To ensure that users have access to the plans they create, the appropriate dataset rules must be present to grant them the permission. For example, set up a dataset rule that allows access to plans that are created by the sign-on user.

See  and Chapter 30, "Working with SmartViews," Working with SmartViews, page 587.

## SmartViews Security

Data access in the SmartViews is restricted to authorized users as it often contains sensitive information. When the SmartViews is in the metric mode, users can see customer data for an audience or segment (within the segment group) only if they are a team member of the corresponding audience or segment. If the SmartViews is in plan mode, they need to be a plan team member of the selected template to see the data. The SmartViews displays a padlock icon next to the audience or segment that users cannot access. The icon indicates that it cannot be viewed.

### *Security for Historical Data*

You can set up SmartViews to display data from past time periods and for comparison with current data. Users personalize how they want historical customer data to appear by selecting the frequency (for example, annually and quarterly) and the number of times to retrieve the data for the selected frequency (for example, two previous quarters).

Historical data is only available for time frames that are defined in the system. To view past data of an audience or segment, users need to be a current team member of the audience or segment when in metric mode. If users are viewing the SmartViews using a plan template (that is, in plan mode), users need to be a current team member of that plan *and* the audience or segment that is displayed.

Through personalization, users can select to view target and actual values for past periods as historical data, and historical variance that is calculated:

Historical variance = (current actual value − previous actual value) / previous actual value

See  and Chapter 30, "Working with SmartViews," Configuring Display Options for Historical Data, page 594
.

### *Security for Audience and Segment Selection*

To select audience and segments for the SmartViews, users must either be a team member, or share a role that the audience or segment has specified as a team role.

See  and Chapter 30, "Working with SmartViews," Viewing SmartViews, page 588.

### *Security for Actions*

SmartViews determine the list of available actions on the SmartViews based on the permission that is given to the sign-on user and the availability of the components that perform the actions. For example, if a user doesn't have permission to create a marketing dialog, this action is not available when the user accesses the My SmartViews page, even if PeopleSoft Marketing is licensed.

Users cannot create account, audience, or segment plans if a SmartView template is selected to view the SmartViews.

See  and Chapter 30, "Working with SmartViews," Viewing SmartViews, page 588.

# Setting Up SmartViews

This section discusses how to:

- Define system data.
- Define metrics.
- Specify time frames for metric updates.
- Define SmartView templates.
- Generate audiences.
- Schedule process for caching metric data.
- View scheduled update results.

## Pages Used to Set Up SmartViews

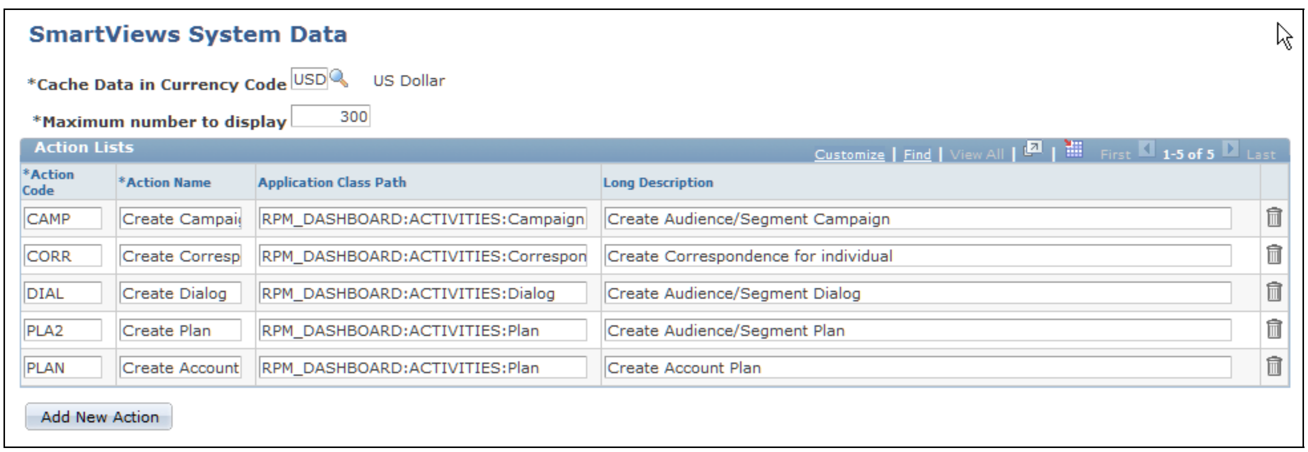
| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| SmartViews System Data | RPM_SYSTEM_DATA | Set Up CRM, Product Related, SmartViews, System Data, SmartViews System Data | Specify the currency code, display option, and actions that users can perform on SmartViews. |
| Metric | RSP_GOAL_TBL | Set Up CRM, Product Related, SmartViews, Define Metrics, Metric | Define metrics that are used to measure SmartViews performance. They are identical to goals in Strategic Account Planning and can be referenced in SmartView templates if you don't license Strategic Account Planning. Both metrics and goals can be aggregated if specified; while the system uses the aggregated goal value to perform target value validation, the aggregated metric value is currently not used in any processing. |
| Update | RPM_GOAL_UPDATE | Set Up CRM, Product Related, SmartViews, Define Metrics, Update | Specify the time frames by which the metric value needs to be calculated and updated in data mart. |

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| SmartView Template | RSP_PLANNING | Set Up CRM, Product Related, SmartViews, SmartView Templates, SmartView Template | Define templates for SmartViews. Use these templates to view the SmartViews if you do not use Strategic Account Planning plan templates. |
| Configure Search Save | RB_FILTER_SAVE | Click the Save Search Criteria link on the search page of any component that supports the generation of audiences in the configurable search page. | Create an audience in the configurable search page. |
| Schedule Updates | RPM_TL_RUN | Set Up CRM, Product Related, SmartViews, Schedule Updates, Schedule Updates | Schedule to run an application engine process that updates metric data. |
| View Updates Result | RPM_UPDATE_SRCH | Set Up CRM, Product Related, SmartViews, View Updates Result, View Updates Result | View status information on goals and metrics after the update process has run. |

## Defining System Data

Access the SmartViews System Data page (Set Up CRM, Product Related, SmartViews, System Data, SmartViews System Data).




SmartViews System Data page

---

**Note.** A user with the SmartViews Administrator role should complete the setup on this page before data caching for SmartViews begins. This is a one-time setup that you will seldom change. If you do make changes on this page, the system requires that you clear all of the cached data for the new setup to take effect.

---

**Cache Data in Currency Code**

Select the default currency that is used for computing goal or metric data and populating it in data mart.

---

***Warning!*** Refrain from changing this value after the system is in production—it can cause unexpected behavior in the system.

---

**Maximum number to display**

Enter the maximum number of customers to display for an audience in the My SmartViews page. To optimize performance, the suggested value is *300.* In addition, users can set up the filter to refine the list customers that return.

### *Action Lists*

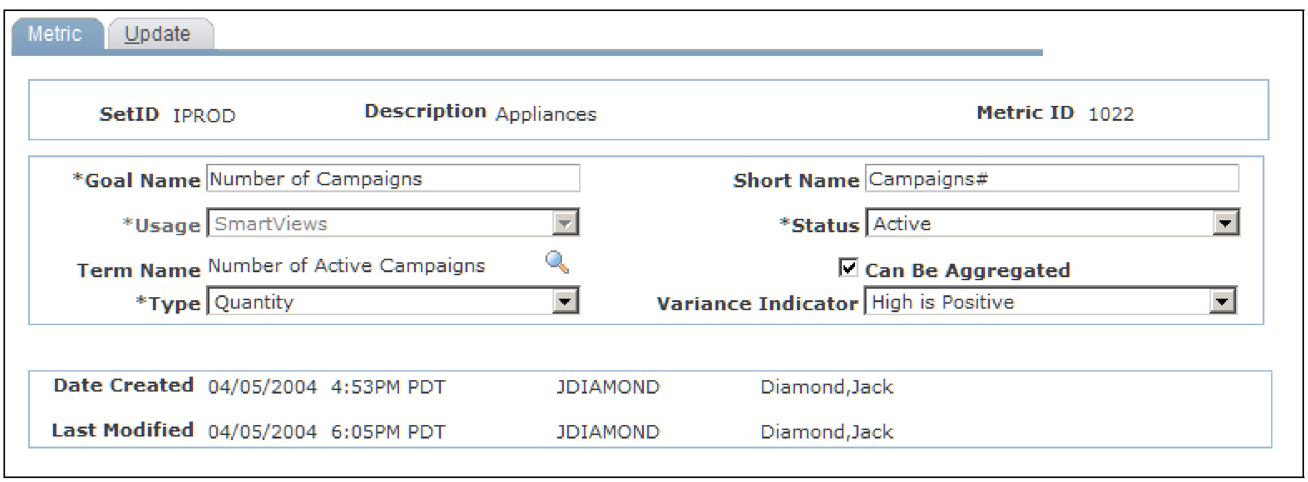
This grid contains a list of system delivered actions that you can invoke for the SmartViews. Engage consulting effort if you wish to add custom action; SmartViews provides the infrastructure where you can reference the custom application class code that is written to execute respective actions.

### *See Also*

Chapter 30, "Working with SmartViews," Working with SmartViews, page 587

## Defining Metrics

Access the Metric page (Set Up CRM, Product Related, SmartViews, Define Metrics, Metric).




Metric page

SmartViews supports the use of goals, which are defined for use in Strategic Account Planning and SmartViews, in SmartView templates. Define metrics if you do not license Strategic Account Planning. Metrics are applicable to SmartView templates only.

**Goal Name** and **Short Name**

Enter the standard (required) and short names of the metric.

Give a descriptive short name and limit its length to 10 characters or fewer. SmartViews displays the short names of metrics as part of the column headings to identify the metrics. If the short name is not available, the system takes the first 10 characters of the standard name to be the short name.

**Usage**

Displays the application that uses the metric. The value is always *SmartViews,* and it's not editable.

If you define a goal, the usage can be *SmartViews*, *Planning* (strategic account planning), or *Both.*

**Term Name**

Specify an Active Analytics Framework term that is used to retrieve data for the metric for measuring SmartViews performance.

**Type**

Select the type of data that is returned. Choose from *Amount*, *Other, Percent,* and *Quantity*.

**Variance Indicator**

Select to indicate whether a high attainment is positive or not. Options are: *High is Positive* and *Low is Positive.*

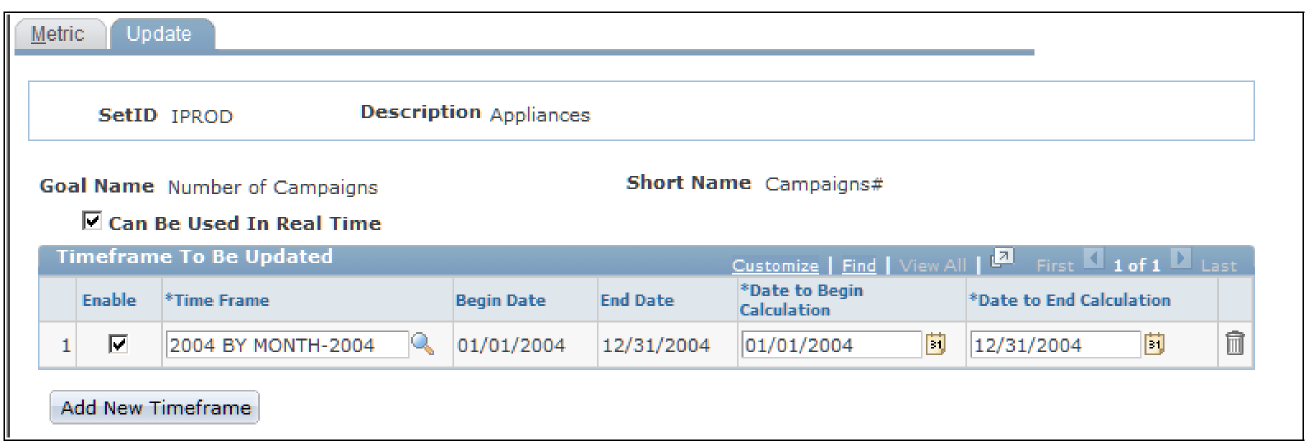
For example, if the term is *number of leads* and it's good that the returned value is higher than the target value, select *High is Positive* for this term.

### *See Also*

*PeopleSoft Strategic Account Planning 9.1 PeopleBook*, "Measuring the Attainment of Plan Goals," Establishing Plan Goal Metrics

## Specifying Time Frames for Metric Updates

Access the Update page (Set Up CRM, Product Related, SmartViews, Define Metrics, Update).




Update page

| | |
|---|---|
| **Can Be Used In Real Time** | Select this check box if you want the metric to automatically update when you click the Fetch Real Time Data button on the My SmartViews page. When you click this button, the system updates the actual values for all the metrics and goals, which have this check box selected, that appear on the page.<br><br>Fetching realtime data for terms can affect system performance, especially KPI (key performance indicator) terms that reference data from external sources. Be cautious about enabling this option for terms. |

### *Timeframe To Be Updated*

This grid lists the time periods within which the metric data is updated. Select from the predefined active time periods that are established in the Time Frames component with usage set to either *all* or *planning & SmartView*. Selecting a time frame automatically populates the Begin Date and End Date fields.

Enter a date range using the Date to Begin Calculation and Date to End Calculation fields for the system to determine if a schedule update needs to occur. When the time comes, the system verifies that the start time falls within this date range; if it does, the update for the corresponding time frame takes place.

If you select the metric to be updated through the AE program, the program retrieves data for the metric within the selected time frames at a frequency defined in each one of them.

---

**Note.** When defining a time frame period for use in SmartViews, make sure that you enter a 10-character short description, which is used to specify the time frame on the column heading for each goal or metric.

---

### *See Also*

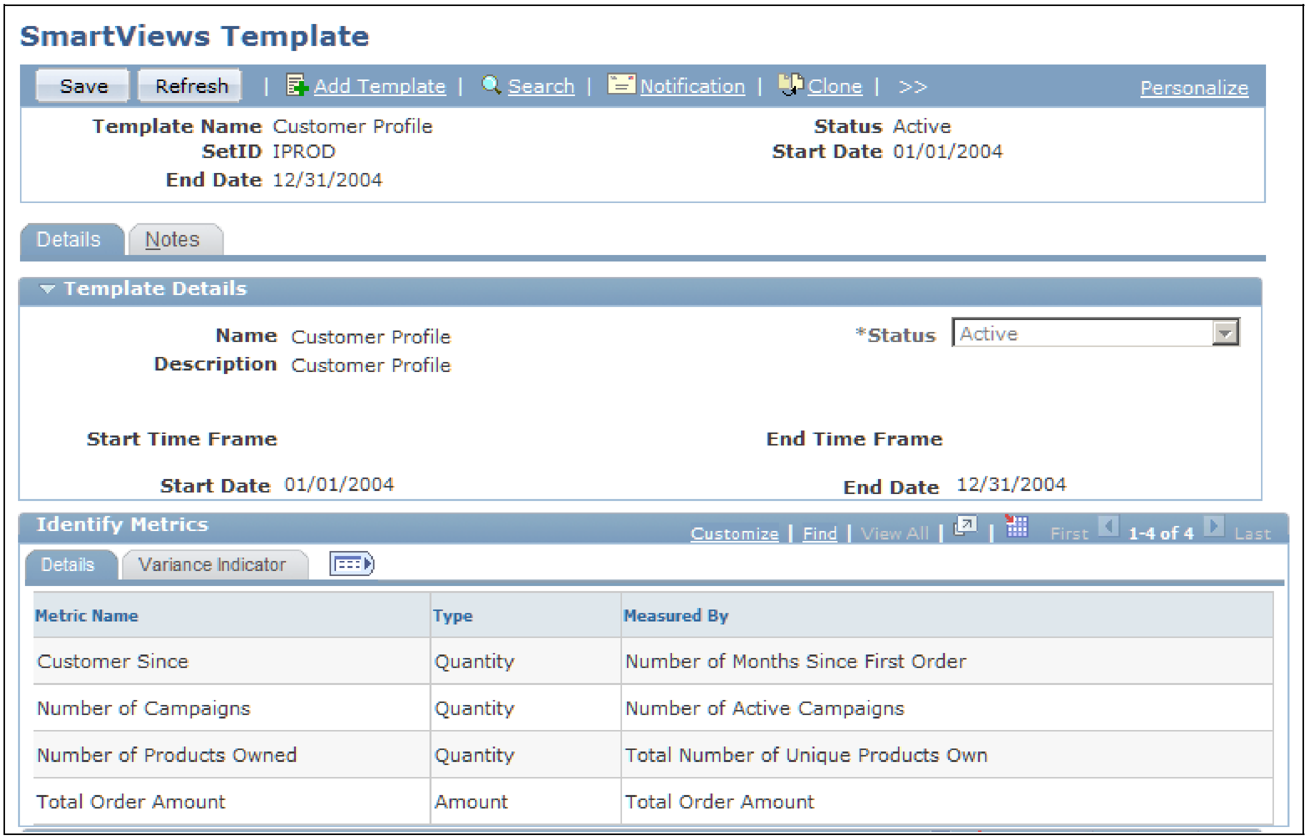
Chapter 15, "Defining Holiday Schedules," Defining Holiday Schedules, Time Frames, and Sales Quota Rollups, page 249

Chapter 29, "Setting Up SmartViews," Setting Up SmartViews, page 577

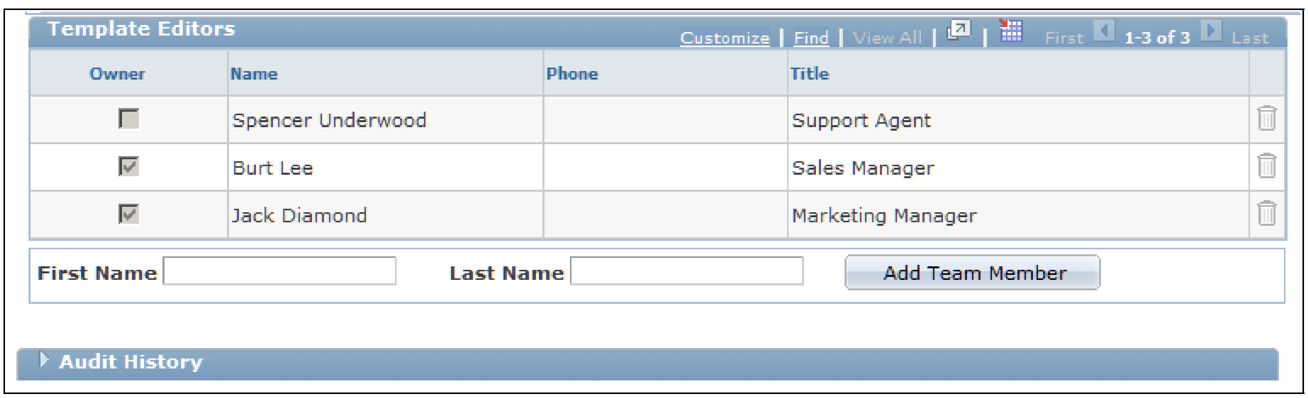
## Defining SmartView Templates

Access the SmartView Template page (Set Up CRM, Product Related, SmartViews, SmartView Templates, SmartView Template).




SmartView Template page (1 of 2)




SmartView Template page (2 of 2)

The interface of the SmartView Template component is almost identical to the Planning Template component. The differences between the two components are:

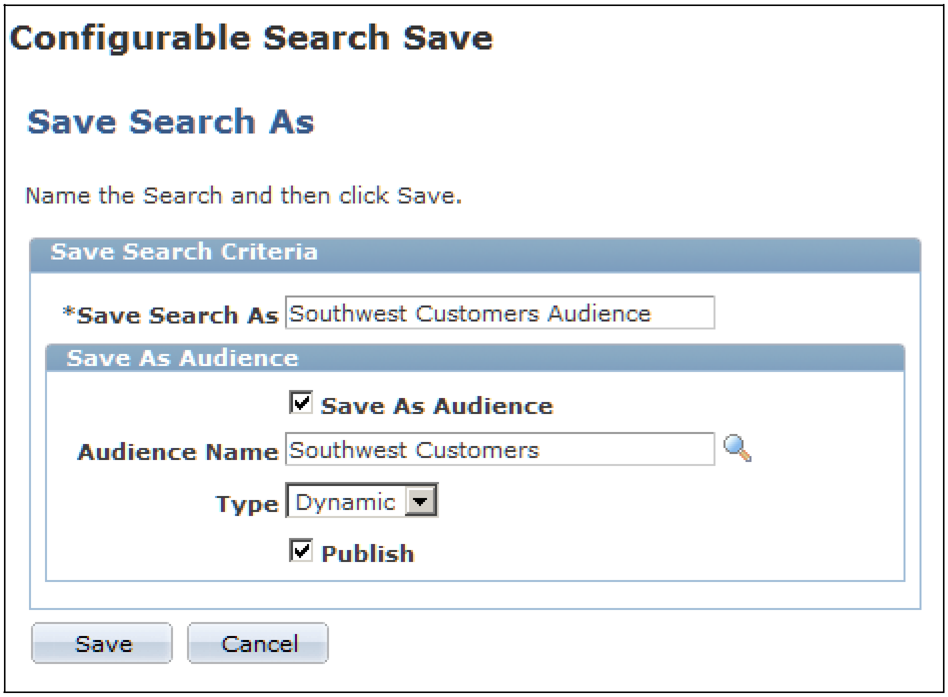
- Some page fields that are specific to planning templates are not displayed in the Template Details group box; for example, Usage, Plan Type, Frequency, Currency and Lock Down Changes to Plan Targets.
- The Objectives and the Plan Team Members group boxes do not appear.

See  and *PeopleSoft Strategic Account Planning 9.1 PeopleBook*, "Setting Up Planning Templates."

## Generating Audiences

This section discusses how to generate audiences and segments using the saved search method. For more information on other ways to generate audiences and segments and their functionality, please refer to the documentation for the marketing application.

Access the search page of the Lead, Opportunity, Person, or Company component and click the Save Search Criteria link after performing a search you wish to save.




Configurable Search Save page

In addition to saving your search criteria for future use, you can save the search result as an audience. Make sure that the Publish check box is selected so that the audience can be used in SmartViews after it is generated.

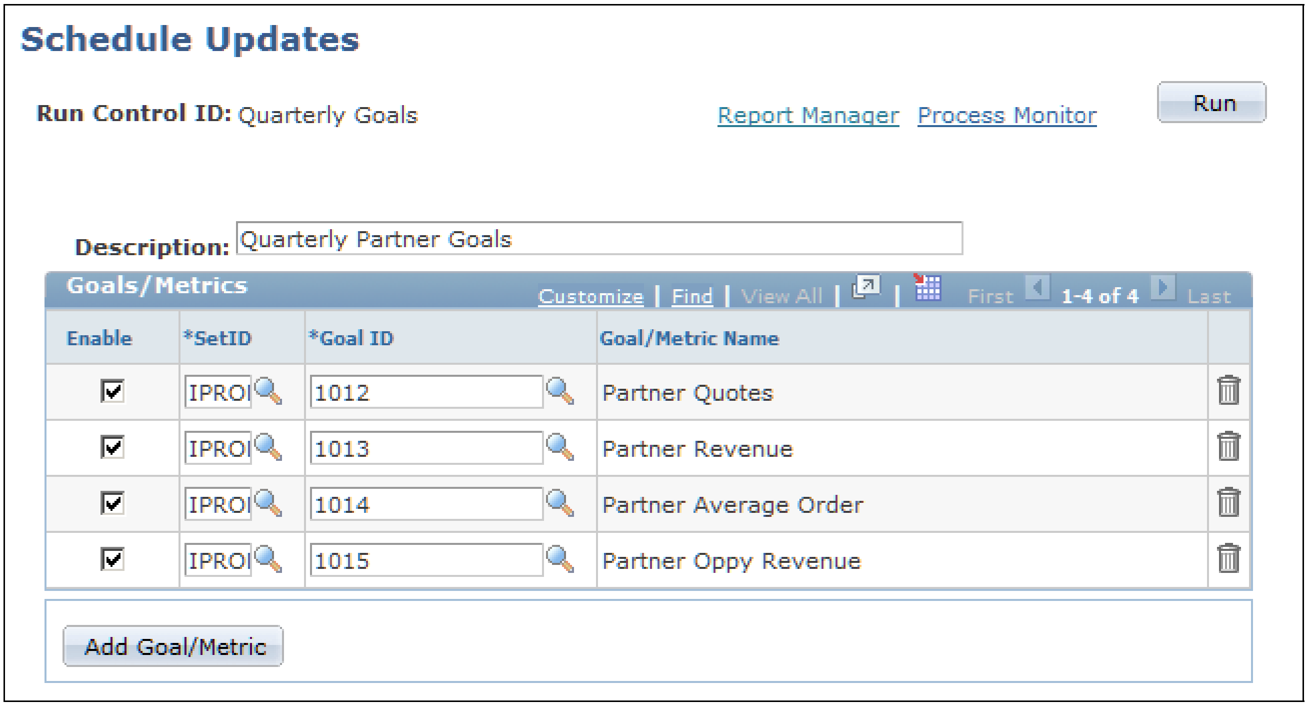
Please refer to the PeopleSoft Marketing documentation for more information about creating segments and other ways to generate audiences.

### *See Also*

*PeopleSoft CRM 9.1 Marketing Applications PeopleBook*, "Using Audiences," Creating and Managing Audiences

## Scheduling Processes for Caching SmartView Data

Access the Schedule Updates page (Set Up CRM, Product Related, SmartViews, Schedule Updates, Schedule Updates)




Schedule Updates page

---

**Note.** Do not put spaces in the run control ID.

---

In the Goals/Metrics grid, enter the goals and metrics to be updated. When you click the Run button on this page, you are transferred to the Process Scheduler Request (PRCSRQSTDLG) page. The system invokes the Run Data Mart Application Engine program (RPM_DATAMART), which retrieves and computes new values for selected goals and metrics as scheduled and populates them in data mart.

It is recommended that you categorize goals and metrics by frequency (yearly, quarterly, monthly, and so on) and create run controls for each applicable frequency. You can then specify the recurring time interval in each run control that is appropriate to its goals and metrics. You can define new recurrence definitions if necessary.

Access to this page is granted to users with the role of SmartView Administrator.

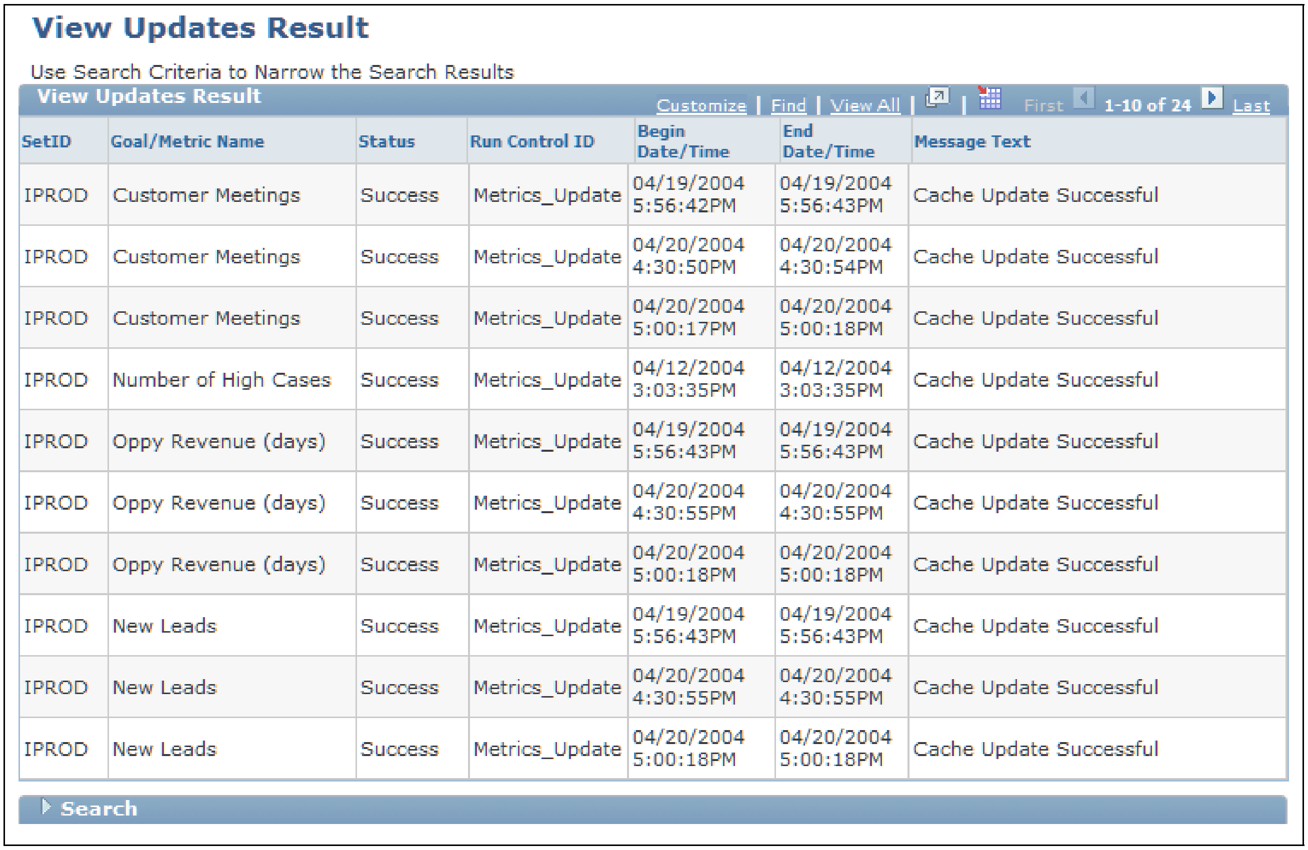
### *See Also*

*PeopleTools 8.52: PeopleSoft Process Scheduler PeopleBook*

## Viewing Scheduled Update Results

Access the View Updates Result page (Set Up CRM, Product Related, SmartViews, View Updates Result, View Updates Result)



View Updates Result

Use Search Criteria to Narrow the Search Results

View Updates Result — Customize | Find | View All | First 1-10 of 24 Last

| SetID | Goal/Metric Name | Status | Run Control ID | Begin Date/Time | End Date/Time | Message Text |
|---|---|---|---|---|---|---|
| IPROD | Customer Meetings | Success | Metrics_Update | 04/19/2004 5:56:42PM | 04/19/2004 5:56:43PM | Cache Update Successful |
| IPROD | Customer Meetings | Success | Metrics_Update | 04/20/2004 4:30:50PM | 04/20/2004 4:30:54PM | Cache Update Successful |
| IPROD | Customer Meetings | Success | Metrics_Update | 04/20/2004 5:00:17PM | 04/20/2004 5:00:18PM | Cache Update Successful |
| IPROD | Number of High Cases | Success | Metrics_Update | 04/12/2004 3:03:35PM | 04/12/2004 3:03:35PM | Cache Update Successful |
| IPROD | Oppy Revenue (days) | Success | Metrics_Update | 04/19/2004 5:56:43PM | 04/19/2004 5:56:43PM | Cache Update Successful |
| IPROD | Oppy Revenue (days) | Success | Metrics_Update | 04/20/2004 4:30:55PM | 04/20/2004 4:30:55PM | Cache Update Successful |
| IPROD | Oppy Revenue (days) | Success | Metrics_Update | 04/20/2004 5:00:18PM | 04/20/2004 5:00:18PM | Cache Update Successful |
| IPROD | New Leads | Success | Metrics_Update | 04/19/2004 5:56:43PM | 04/19/2004 5:56:43PM | Cache Update Successful |
| IPROD | New Leads | Success | Metrics_Update | 04/20/2004 4:30:55PM | 04/20/2004 4:30:55PM | Cache Update Successful |
| IPROD | New Leads | Success | Metrics_Update | 04/20/2004 5:00:18PM | 04/20/2004 5:00:18PM | Cache Update Successful |

Search

View Updates Result page

This page displays the update status of each goal or metric after the process has run—success or failure. If no goals are defined to be updated, then no status is displayed.

The size of the View Updates Result grid increases over time and, in most cases, you do not need to view schedule updates from more than a week ago. You can set up the system to empty the PeopleSoft Process Scheduler tables and file system periodically. Set this up on the Purge Settings page. For more information about system purge options, please refer to the documentation for PeopleSoft Process Scheduler.

### See Also

*PeopleTools 8.52: PeopleSoft Process Scheduler PeopleBook*

## Chapter 30

# Working with SmartViews

This chapter discusses how to work with SmartViews.

## Working with SmartViews

This section discusses how to:

- View SmartViews.
- Configure SmartViews.
- Personalize templates for display.
- Configure display options for historical data.

### Pages Used to Work with SmartViews

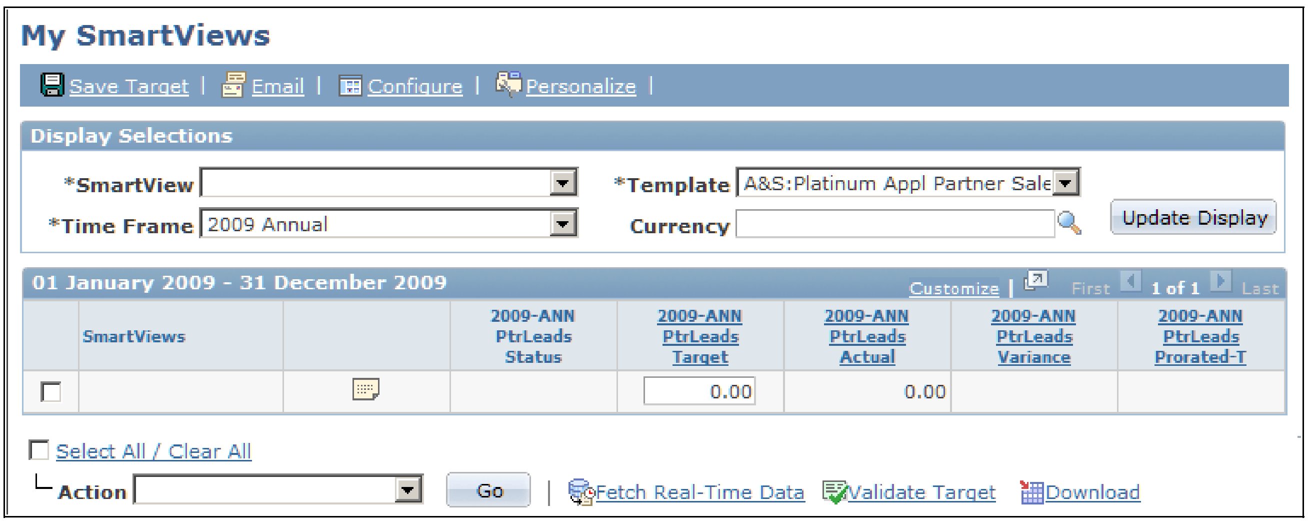
| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| My SmartViews | RPM_DASHBOARD | My SmartViews, My SmartViews | View your SmartViews. |
| Create Campaign Page | RPM_CAMPAIGN | Select *Create Campaign* from the Action field and click the Go button. | Create campaigns for selected audiences or segments. |
| Create Correspondence Page | RPM_CORRESPONDENCE | Select *Create Correspondence* from the Action field and click the Go button. | Create correspondence requests for selected accounts or segments. |
| Create Dialog Page | RPM_DIALOG | Select *Create Dialog* from the Action field and click the Go button. | Create advisor dialogs for selected audiences or segments. |
| Configure My SmartViews Profile | RPM_SETUP | Click the Configure toolbar button on the My SmartViews page. | Select audience or segment groups that the SmartViews is built for and templates that are used to look at the SmartViews. |

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Personalize Template | RPM_PERSONALIZE | Click the Personalize toolbar button on the My SmartViews page. | Select which goals or metrics and their data types to display on the SmartViews. |
| Set Template Metric History | RPM_HISTORY | Click the Edit History link on the Personalize Template page. | Configure options to display historical data. |
| Create Plan | RPM_PLANS | Select *Create Account Plan* from the Action field and click the Go button. | Create account plans for selected accounts. |
| Audience Plan | RSP_PLANNING | Select *Create Audience Plan* from the Action field and click the Go button. | Create audience plans for selected audiences. |

## Viewing SmartViews

Access the My SmartViews page (My SmartViews, My SmartViews)




My SmartViews page

The view of this page pertains to the signed-in user. When users access this page for the first time, the system displays the Configure My SmartViews Profile page, where they select at least one audience or segment group and one template to build their own SmartViews.

On the My SmartViews page, users review how each member of the selected audience or segment group performs based on the retrieved data that is defined from the selected template.

They can personalize the SmartViews by choosing which goal or metric data columns appear and how historical data is handled. Users can also make changes to target values directly in the SmartViews and save changes to the corresponding plan, if a plan template is used. If necessary, they can perform actions on selected audience or segment group members.

When users click the segment or audience link to transfer to the actual segment and audience, the customer counts that are displayed in parenthesis on the My SmartViews page can be different from what is shown in the component. This is because the number on the My SmartViews page denotes the number of companies or partners in that audience or segment, whereas, in the actual component, the number is translated to the number of contacts associated with the companies or partners.

The SmartViews shows a maximum of eight terms. Every historical data for a term is also treated as a term. SmartViews provides a personalization option for users to refine the data they want to see if there are more than eight terms.

**Time Frame**

Select a time period within which the SmartViews is displayed. The selected template dictates the available time frames in this drop-down list box. When you select a different template, the values in the Time Frame field may change accordingly.

For planning templates, the time frame selection always includes the current period specified in the template, the period previous to the current period, and the period after the current period.

For SmartViews templates, the time frame selection consists of the applicable time frame period type in the system for the current time you're looking at the SmartViews.

For example, if you access your SmartViews in January 1, 2009, the applicable time frame may include *2009 January, 2009 first quarter, 2009 fiscal year*, and so on, depending on the time frame period types that are defined.

For each of these time periods, the selection also includes the one before and the one after the current one. Therefore, for the 2009 January time period, additional time frames 2008 December and 2009 February become available in the Time Frame drop-down field.

**Update Display**

Click to refresh the My SmartViews page. Make sure to click this button after making changes to the SmartView,Template,Time Frame, or Currency field.

Indicates the audience list. Clicking the adjacent audience link transfers you to the actual audience in the Manage Audiences component in a new browser window.

Indicates consumers. Clicking the adjacent consumer link transfers you to the actual consumer in the Consumer component in a new browser window.

Indicates partners. Clicking the adjacent partner link transfers you to the actual partner in the Partner component in a new browser window.

Indicates workers. Clicking the adjacent worker link transfers you to the actual worker in the Worker component in a new browser window.

Indicates companies. The lowest level of a segment group or audience is always companies. Clicking the adjacent company link transfers you to the actual company in the Company component in a new browser window.

| | |
|---|---|
| ? | Indicates that the type of the corresponding entity is unsupported, for example, site or broker. |
|  | Indicates the segment group. |
|   and  | Indicate segments. Clicking the adjacent segment link transfers you to the actual segment in the Segment component in a new browser window.<br><br>If you're in metric mode, click the second folder button of a segment to view a list of customers that belong to the segment. The presentation is identical to viewing an audience.<br><br>Click the third folder button to return to the segment group view. This drill-down capability is not applicable to the plan mode. The SmartViews is in plan mode when a planning template is in use. |
| Save Target | Click to save changes you make on target values to the corresponding plan. This button doesn't apply if the SmartViews is in the metric mode (meaning a SmartViews template is in use). |
| Email | Click to access the Email SmartView page, where you can send email to interested parties with the SmartViews as a .csv attachment. Users need to have an email address defined in the CRM system to send emails on this page. The SmartViews is sent to the user's email address that is specified for the *business* type on the Worker page. |
| Apply Filter | Click to access the Filter SmartView page to filter customers that you see on the SmartViews. By default, the SmartViews shows 300 rows of data (recommended). Specify the row display setting on the SmartViews System Data page.<br><br>If you want to change the filter criteria, click the Change Filter button to access the Filter SmartView page and modify the values. Click the Remove Filter button to delete the filter. These two buttons appear only when you have applied filter to the audience or segment group on your SmartViews.<br><br>**Note.** The Apply Filter button does not appear in plan mode. |
| Configure | Click to access the Configure My SmartViews Profile page to select audience (and segment groups) and templates to view the SmartViews. |
| Personalize | Click to access the Personalize Template page to select which goals or metrics and their data types to display on the SmartViews. |
| Fetch Real Time Data | Click to immediately update the actual data for goals and metrics that is enabled for realtime update. The update applies to data in the time period you're currently viewing. |

**Validate Target**

Click to validate the aggregated target values of accounts (or child segments) with the total value at the audience (or segment) level and show the result as pop-up window messages. The system disables this button when a SmartViews or an account template is in use, or when a filter is applied. This functionality is not applicable to goals or metrics that cannot be aggregated as defined.

**Download**

Click to export the SmartViews grid to a spreadsheet in a new browser window.

 and 

Click to access the Summary page to view information pertaining to the corresponding customer. Both icons provide information about the data fetching result and list existing plans that the corresponding customer may have. The alert icon (the one with the exclamation point) is used typically when the system is unable to get certain data and someone in the team may need to review the issue. If you want to review the data fetching result and don't want to click the icon every time, place the cursor over the links; the system displays information about the result.

**Action**

Select an action to perform for selected customers. System-delivered options include *Plan, Campaign, Dialog* and *Correspondence.* You can create custom actions by writing application class code and referencing it in the SmartViews System Data page.

You can select to add an audience plan or account plan if you view an audience using a planning template (for audience and segment) on the My SmartViews page. Create one type of plan for the selected customers or accounts at a time.

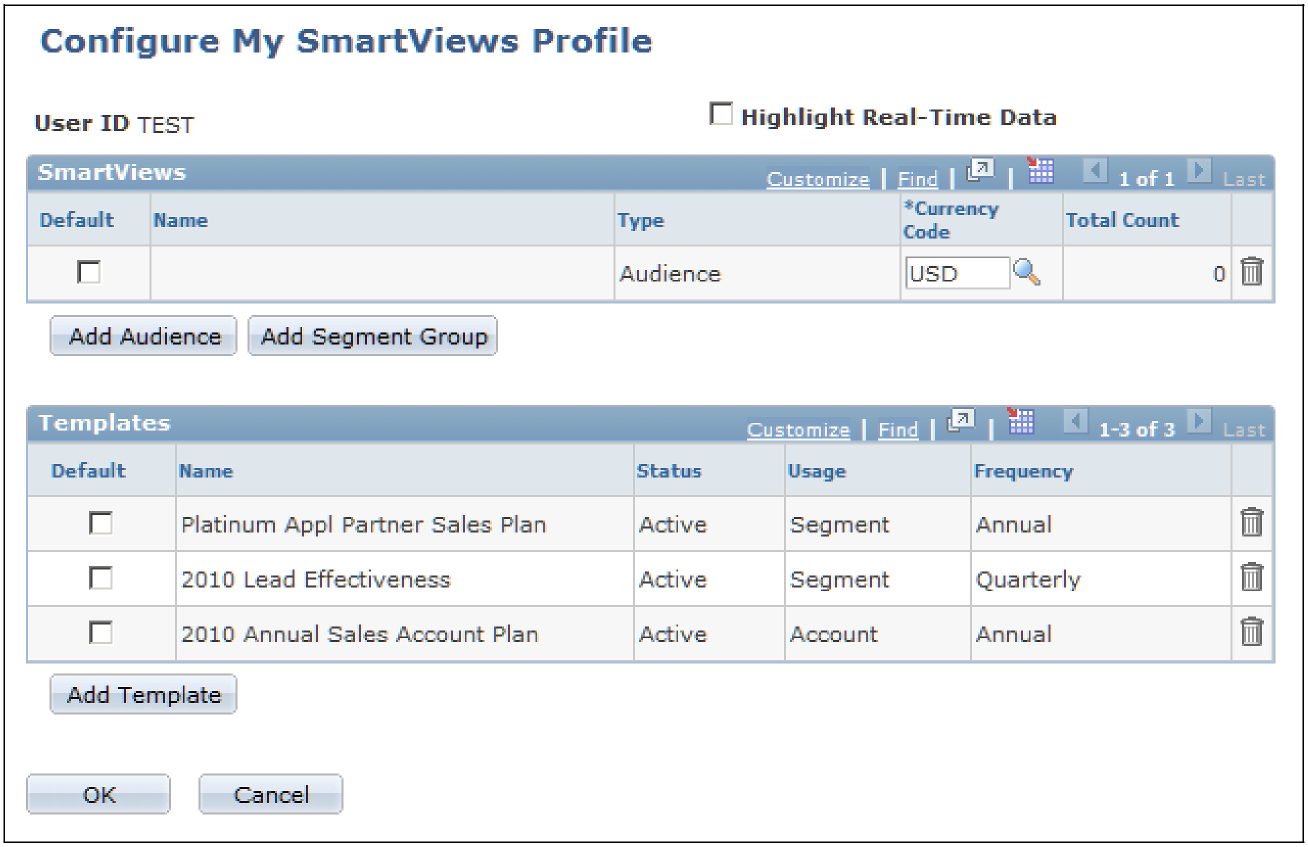
If you create a campaign for an activity type that uses any of the listed marketing channels, you need to enter the corresponding required values on the Activities page of the Marketing Programs component to save the campaign:

- Order Capture channel: list, offer, and script name are required.
- Facsimile channel: list and package are required.
- Telesales channel: content, offer list, script name, and integration are required.
- Mail channel: list and package are required.
- Sales Agents channel: list is required.
- Advisor channel: advisor ID is required.

## Configuring SmartViews

Access the Configure My SmartViews Profile page (click the Configure toolbar button on the My SmartViews page)




Configure My SmartViews Profile page

**Highlight Real-Time Data** Select to let the system highlight the new and changed data after the fetch realtime data process is complete.

### *SmartView*

This grid lists the audience and segment groups that become available for selection in the SmartView drop-down list box on the My SmartViews page. Select an entry as a default value that always shows up in the SmartView field. To add a new audience or segment group, click the corresponding button to add a new row. If you don't use PeopleSoft Marketing, the Add Segment Group button does not appear.

---

**Note.** If you access this page and change the default SmartView while you're in the My SmartViews page, the change takes effect the next time you access the My SmartViews page; for example, when you click the My SmartViews link on the left navigation menu.

---

**Currency Code** Select the default currency to use when this audience or segment group is selected.

**Total Count** Specify the number of customers in this audience or segment group.

### *Template*

This grid lists all the planning and SmartViews templates that are created in the system with either goals or metrics. Selected templates become available in the Template drop-down list box on the My SmartViews page. While you can select both active and draft templates to be included in the Template drop-down list box, only the active ones are available at runtime. Specify an active template as the default template used to display your SmartViews.

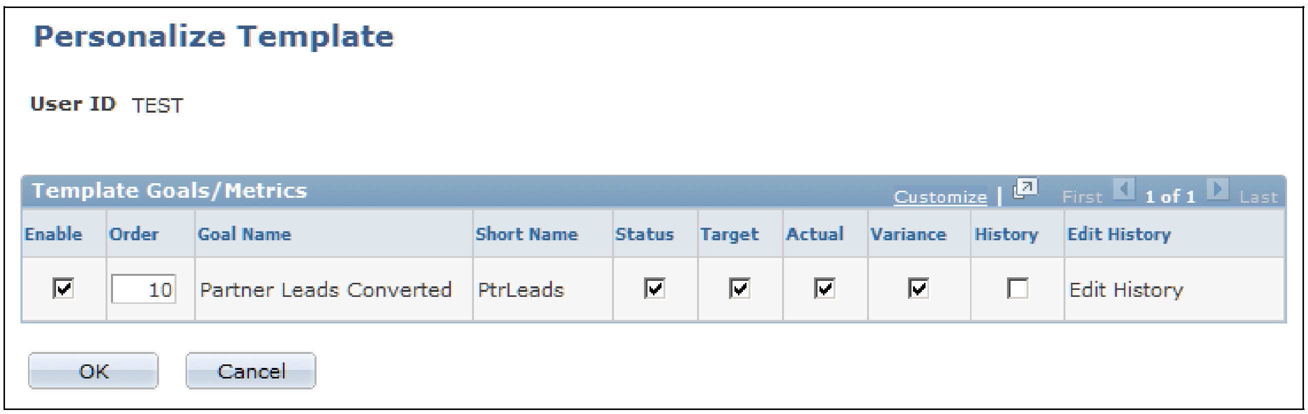
---

**Note.** If you access this page and change the default template while you're in the My SmartViews page, the change takes effect the next time you access the My SmartViews page; for example, when you click the My SmartViews link on the left navigation menu.

---

## Personalizing Templates for Display

Access the Personalize Template page (click the Personalize toolbar button on the My SmartViews page)




Personalize Template page

The Status, Target, and Variance check boxes are disabled if you select a SmartView template.

| | |
|---|---|
| **Enable** | Select to show the corresponding goal or metric on the My SmartViews page. |

| | |
|---|---|
| **Status, Target, Actual, Variance,** and **History** | Select the corresponding check box to display data about the goal or metric on the SmartViews:<br>• Status displays the assessment icon of the goal for each customer. It applies to planning templates only.<br>• Target displays the current target value of the goal for each customer. It applies to planning templates only.<br>If the goal is marked as prorated in Strategic Account Planning, a Prorated-T (prorated target) column is shown on the My SmartViews page if the Target check box is selected.<br>• Actual displays the current actual value of the goal or metric for each customer.<br>Actual data comes from Strategic Account Planning when SmartViews are in plan mode. In metric mode, SmartViews data is retrieved from the data mart. Because of the difference in the way data is returned, discrepancies may occur if the times when the data was retrieved from both mechanisms are not the same.<br>• Variance displays the current variance value of the goal for each customer. It applies to planning templates only. The variance value is calculated as:<br>Variance = (actual value − target value) / target value<br>• History displays historical information about the goal or metric for each customer. |
| **Edit History** | Click to access the Set Template Metric History page and specify the criteria for displaying historical data on the SmartViews. |

## Configuring Display Options for Historical Data

Access the Set Template Metric History page (click the Edit History link on the Personalize Template page).

| | |
|---|---|
| **Period Type** and **Number of Past Periods** | Display the time periods for which historical data can be displayed. The available periods are determined by the period types that are defined in the system.<br><br>For example, if the *monthly* period type exists in the system, you can see two period types on this page that pertains to it: *monthly* and *same month of past years*. If you enter *2* as the number of past periods for the *monthly* period type, the system returns two columns of past data for the two months previous to the current date. If you enter *2* as the number of past periods for the *same month of past years* period type, the system returns two columns of past data for the same month as the current date but from the past two years.<br><br>**Note.** The relevant time frame periods in the past must be defined and remain active for the past data to be displayed. Establish time frame periods in the Time Frames component. The usage must be set to either *All* or *Planning & Portfolio* for use in the SmartViews. |
| **Target** | Select to display the target value of the past periods (not available if the SmartViews is in the metric mode). Past target values are not editable.<br><br>The Prorated-T column (reflecting current data) does not apply to historical target data. |
| **Actual** | Select to display the actual value of the past periods. |
| **Variance** | Select to display the current variance value (not available if the SmartViews is in the metric mode). |
| **History Variance** | Select to display the history variance of the current and the past data. History variance applies to time period of the same type. |

### *See Also*

Chapter 15, "Defining Holiday Schedules," Defining Holiday Schedules, Time Frames, and Sales Quota Rollups, page 249

## Appendix A

# Managing PeopleSoft Customer Relationship Management Integration Points

This chapter provides an overview of the interactive services repository, PeopleSoft Customer Relationship Management (PeopleSoft CRM) integration points, and discusses how to:

- Process PeopleSoft Business Interlinks transactions.
- Process inbound service operations.
- Process inbound transactions.
- Process outbound service operations.
- Set up chunking.
- Publish outbound service operations.

## Understanding the Interactive Services Repository

The Interactive Services Repository (ISR) is a compilation of information about the numerous service endpoints exposed by Oracle's PeopleSoft and JD Edwards product families. Integration Points, also known as EIPs or XPBs, are the web service connections that enable PeopleSoft and JD Edwards applications to work smoothly with third-party systems and software, as well as other Oracle applications.

ISR works in conjunction with PeopleBooks to help users and implementation specialists fully explore the integration capabilities of our products.

Developers use ISR to document the technical structure of an integration point, its design patterns, and underlying technology. Analysts will use ISR to explore and understand integration points from a business process context. This is especially useful when implementing an Oracle-supported reference business process across multiple products and release versions.

### Key Search Features of ISR

ISR contains high-level information about each integration point, including:

- Brief description.
- Product family.

- Product owner.
- Business Process association.
- Data rules.
- Setup rules.

ISR enables you to quickly discover the integration points that are relevant to your specific needs. You can search for integration points by name, integration set, product, between products, business process, and technology type. Use My Oracle Support to access ISR.

### *See Also*

Introduction to the Interactive Services Repository [ID 735571.1]

## Understanding PeopleSoft CRM Integration Points

PeopleSoft CRM integration points enable you to:

- Send or publish service operations to a third-party system.
- Accept or subscribe to service operations from third-party systems.
- Send a synchronous request and reply transaction to a third-party system for processing.

## Processing PeopleSoft Business Interlinks Transactions

Sometimes PeopleSoft CRM needs to call an external system vendor's application to request information. This information must be provided in a realtime, synchronous mode. The PeopleSoft application waits for the answer from the other application in realtime, before the PeopleSoft application can continue processing.

These transactions use PeopleSoft Business Interlinks definitions to specify the data passed to this external system as well as to define the output to be received from the external system. The data that is passed from the interlink object is interpreted by an interlink plug-in, which then contacts the external system, passes the data in the correct form, retrieves the data, and then passes it, in the correct form, back to the interlink object.

---

**Note.** Business Interlink are just one of the ways you can process realtime transactions. There are many different ways you can capture this kind of information. Please refer to the ISR on My Oracle Support for more information.

---

### *See Also*

Introduction to the Interactive Services Repository [ID 735571.1]

*PeopleTools 8.52: PeopleCode API Reference PeopleBook*

# Processing Inbound Service Operations

Third-party systems can send PeopleSoft applications information using a number of integration points established throughout the system. Depending on the application, various technologies provide multiple options for interacting with the PeopleSoft system. Each option provides audit trails, validations, and error handling to insure that data integrity is maintained within the PeopleSoft database.

See http://www.peoplesoft.com/corp/en/iou/optimize/doc_software.jsp.

## Understanding the Inbound Transaction Architecture

Depending on the requirements of the interacting system and the integration point within the PeopleSoft system, various technologies are used to receive transactions into the PeopleSoft system:

### *Application Message Based Transaction*

The PeopleSoft Application Messaging functionality provides a method for asynchronous communications between external systems and PeopleSoft applications using industry standard XML-formatted messages. XML messages are automatically loaded into the PeopleSoft system by setting the queue status to run for each message type. You can view all transactions in the transaction log and access the detail pages that enable you to correct transaction errors. Most subscription processes get associated to handlers. Handlers are then defined on a service operation.

The Inbound File Publish utility, which utilizes the File Layout Object tool, may also be used to automatically convert flat file input to XML-based application messages.

### *Electronic Data Collection Transaction Pages*

PeopleSoft CRM includes transaction pages for many of the inbound transactions. The transaction pages are designed for quick data entry. There are minimal edits, and no application database updates are performed in these pages as the background programs scanning the transaction logs handle detail processing. The transaction pages provide a method of quick data entry for much of the transaction-based information processed by the system. You can enter the transactions directly onto the page, or attach a wedge and bar code reader to take advantage of bar code scanning benefits.

### *System-Generated Transactions*

Several transactions that are fed in the transaction log are generated from internal application programs. By generating these transactions, applications push heavy processing functions to a background mode.

### *Validations, Error Handling, and Database Updates*

Most inbound transactions, no matter which technology delivers them to the PeopleSoft system, are loaded into staging tables, where they are validated by background routines scanning these transaction logs awaiting incoming work. If errors are found, the transaction status in the transaction log is changed to *Error,* and rows are inserted into error tables for each error message.

Error messages appear on the Transaction Maintenance page for transactional type data such as, inventory adjustments and purchase order receipts (select PeopleTools, EDI Manager, View EDI Audit Trail, Transaction Maintenance).

For definitional type data such as item master and bills of material, the Data Definition page is used to review and correct the erroneous information.

Once you have corrected the information and saved the page, the transaction is ready to be reprocessed.

Some transactions provide functionality to immediately validate and update application tables from subscription processes. For example, the Consumer and Par Location Count transactions both attempt to update the application tables, but if errors are found, the transactions write the data to the error tables so that corrections can be made.

#### *See Also*

*PeopleTools 8.52: PeopleSoft Integration Broker PeopleBook*

*PeopleTools 8.52: PeopleSoft Integration Broker Administration PeopleBook*

# Processing Outbound Service Operations

Outbound EIPs exist throughout the PeopleSoft system, providing interface points for third-party applications requiring information as activity occurs within the PeopleSoft system. The PeopleSoft Application Messaging technology is utilized to format and publish industry standard XML messages. For example, as item master information is entered into PeopleSoft applications, the system generates XML-based messages and delivers them to third-party systems requiring this information to set up their own item master tables.

## Understanding the Outbound Transaction Architecture

PeopleSoft CRM applications as well as interacting third-party systems have various processing and timing requirements that dictate when information can be generated or received. For this reason, the integration points provided by PeopleSoft utilize a number of different approaches when generating outbound application messages.

For example, a third-party system requiring item master information from the PeopleSoft Inventory application may want immediate incremental updates as information is changed online or may want periodic updates on a nightly or weekly basis. The Item Master EIP provides both options, giving the third-party system the choice as to how it wants to receive this information.

#### *Component or Incremental Publish*

The system generates Component Published messages immediately upon saving a component in various PeopleSoft applications. Components used to maintain setup type information such as items or customers utilize the Component Publish approach.

#### *Batch Publish*

Batch Publish messages provide the functionality to group many like transactions into a single message.

Background processes that work on batches of transactions at one time utilize this approach.

In addition, other processes use this approach where interface requirements demand various groupings of like transactions based on common information within each transaction. For example, an Advanced Shipping Notice message can be published to a customer when the customer's order is shipped within the PeopleSoft Inventory system. This message may go directly to the customer or it may go through third-party software that converts the XML message to one of the industry standard EDI formats, such as X.12, before passing it on to the customer. Using the options available with the Batch Publish approach, users can dictate whether to create a single message for all customers to send to the third-party software or create individual messages to send directly to each customer.

PeopleSoft CRM applications all use the Publish Outbound Message process to initiate the Batch Publish messages. Built into this routine is the Batch Publish utility, a common PeopleSoft tool that provides the functionality to group and filter or "chunk" messages as noted in the previous example.

The Batch Publish utility also provides the option to create flat files instead of XML messages, when file layout objects exist for transactions being generated. File layout objects are easy to modify, and PeopleSoft provides examples for all transactions included in the EDI feature.

### *Full Data Replication*

Full data replication is the process used to seed, or initially populate or repopulate, a copy of an entire table onto a remote database or legacy system. The entire contents of the table are published to all systems that require a copy of the table. Generally, full data replication occurs with setup tables—that is, relatively static, low volume tables keyed by setID.

Once a copy of the table exists, incremental updates provide a mechanism or process to keep the copy up-to-date with changes made on the master. Incremental updates occur most often with transaction tables—that is, frequently updated tables keyed by business unit.

Most full data replication message names end in _FULLSYNC.

## Appendix B

# Delivered Web Service and Service Operations for CRM Common Components

This appendix discusses the delivered web services for CRM common components and how to view message elements for tasks and call reports.

## Delivered Web Services

This section discusses:

- Task web service.
- Call report web service.
- Contact web service.
- Calendar web service.

***See Also***

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Business Processes and Web Services"

## Task Web Service

PeopleSoft CRM delivers these service operations for the Task web service:

- Create Task

  This service operation is a synchronous process that takes these inputs to create a task: subject and task type (task types are user defined, for example: MEETING, PHONECALL, and APPOINTMENT).

  Optionally, you can supply information on contacts, transactions, assignments and notes to be associated with the task. For each of the optional information you want to add to the task, these values are required as inputs:

  - (For Contact) Contact Person ID and contact role type.

    Make sure that the person ID entered is valid for the call report creation.

  - (For Transaction) Transaction type, transaction market, and transaction SYNC ID.
  - (For Assignment) Task assignee and contact role type.
  - (For Note) Note summary and start date.

  This service operation returns the ID of the task once it is created successfully. No recurring tasks can be created through this web service for this release. Attachments cannot be added as part of the task notes.

- Get Task

  This service operation is a synchronous process that takes a valid task ID (full ID; partial ID is considered invalid) and returns the task and its detailed information. It returns an empty result set if the ID is invalid. The user ID that is passed in the message determines the tasks that the user is authorized to view.

- Notify on Task Complete

  This service operation is an asynchronous operation that notifies the calling process when a task is completed or canceled. It takes the task ID and sends a response message to notify the calling process when the status of the specified task is changed to either completed or canceled.

- Search Task

  This service operation is a synchronous process that takes any of these inputs and returns return a list of tasks and their associated information that match the specified search criteria:

  - Task subject.
  - Task type.
  - Task priority.
  - Task status.
  - Task start date.
  - Task end date.
  - Task owner.

  If no matches are found, the system returns an empty result set.

- Get a List of Task Types

  This service operation is a synchronous process that takes any of these inputs and returns task types that match the specified search criteria:

  - Task type.
  - Active flag (Y/N).
  - Task type description.
  - Application usage (for example, ALL = All Applications; CHMG = Change Management; FLDS = Field Service; HLPD = HelpDesk; PIM = Personal Information Mgmt; SSP = Strategic Planning; SALS = Sales; SUPP = Support).

  If no matches are found, the system returns an empty result set.

- Update Task Assignee

  This service operation is a synchronous process that takes these inputs to add, delete, or update task assignees:

  - Task ID.
  - Assigned To Person ID.
  - Update Action (ADD = Add; DEL = Delete; UPD = Update).

  You can also specify these attributes as inputs when you add, delete or update task assignees: assigned status (ACPT = Accepted; CMPL = Completed; DCLN = Declined; OPEN = Assigned) , contact BO ID, contact role type ID, customer BO ID (make sure that the ID is valid), and customer role type ID.

  ---

  **Note.** In order to update a task assignee, the status of the task cannot be *Complete* or *Canceled.* Also, the current user has to have access to the task (as defined by the dataset rule RB_MY_TASK) and meets one of these conditions: the user is the owner of the task, OR the user is the assignee of the task *and* the action selected is *UPD*, OR the user has manager privileges but is not an assignee of the task.

  ---

  At the end of the operation, the system returns three pieces of information in the response message: Task ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

- Update Task Contact

  This service operation is a synchronous process that takes these inputs to add, delete, or update task contacts:

  - Task ID.
  - Contact Person ID.
  - Update Action (ADD = Add; DEL = Delete; UPD = Update).

  You can also specify these attributes as inputs when you add or update task contacts: contact BO ID, contact role type ID, customer BO ID (make sure that the ID is valid), customer role type ID, and the Primary indicator (Y/N).

  ---

  **Note.** In order to update a task contact, the status of the task cannot be *Complete* or *Canceled.* Also, the current user has to have access to the task (as defined by the dataset rule RB_MY_TASK).

  You can only have one primary contact in a task. Therefore, if you specify a contact that you add or update as primary, the primary contact flag of the rest of the contacts in the same task is then set to N.

  ---

  At the end of the operation, the system returns three pieces of information in the response message: Task ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

- Update Task Header

  This service operation is a synchronous process that takes the task ID as the input to update task headers. You can specify these attributes that you want to update in the task, which include:

  - Task Type.
  - Subject.
  - Task Priority (task priorities are user defined, for example, 1 = High; 2 = Medium; 3 = Low).
  - Status (for example, CMPL = completed; CNCL = Canceled; INPR = In Progress; OPEN = Open).
  - Start Date.
  - Start Time.
  - End Date.
  - End Time.
  - Time Zone.
  - Location.
  - Private flag (Y/N).
  - Application Usage.
  - Person ID of the owner.
  - Description.

  **Note.** In order to update a task header, the status of the task cannot be *Complete* or *Canceled.* Also, the current user has to have access to the task (as defined by the dataset rule RB_MY_TASK), and the user must either be the owner of the task, or has manager privileges (but is not an assignee of the task).

  At the end of the operation, the system returns three pieces of information in the response message: Task ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

- Update Task Note

  This service operation is a synchronous process that takes these inputs to add, delete, or update task notes:

  - Task ID.
  - Note's Sequence Number.

    If you add a new note, the system assigns the next available sequence number to the new note and ignores the one that is supplied.

  - Task Summary.
  - Update Action (ADD = Add; DEL = Delete; UPD = Update).

  You can specify these attributes as inputs when you add or update task notes: subject, start date, end date, and description.

  ---

  **Note.** In order to update a task note, the status of the task cannot be *Complete* or *Canceled.* Also, the current user has to have access to the task (as defined by the dataset rule RB_MY_TASK),

  ---

  At the end of the operation, the system returns three pieces of information in the response message: Task ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

- Update Task Transaction

  This service operation is a synchronous process that takes these inputs to add or delete transactions on tasks:

  - Task ID.
  - Transaction Type (transaction types are user defined, for example, COMPANY, LEAD, OPPRT, and PARTNER).
  - Update Action (ADD = Add; DEL = Delete).
  - Transaction Market.
  - Transaction SYNC ID.

    This is the SYNC ID for the corresponding transaction type ID. Make sure that you enter a valid ID.

  ---

  **Note.** In order to update a task transaction, the status of the task cannot be *Complete* or *Canceled.* Also, the current user has to have access to the task (as defined by the dataset rule RB_MY_TASK).

  You can only have one primary transaction in a task. Therefore, if you specify a transaction that you add or update as primary, the primary contact flag of the rest of the transactions in the same task is then set to N.

  ---

  At the end of the operation, the system returns three pieces of information in the response message: Task ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

This table provides the technical names, operation type, and messages names of the service operations that are related to the Task web service:

| ***Service Operation*** | ***Operation Type*** | ***Request Message*** | ***Response Message*** |
|---|---|---|---|
| Create Task(RB_TASK_CREATETASK) | Synchronous | RBTASKCREATEREQ | RBTASKCREATERES |
| Get Task (RB_TASK_GETTASK) | Synchronous | RBTASKGETREQ | RBTASKGETRES |
| Notify on Task Complete (RB_TASK_NOTIFYONCOMPLETE) | Asynchronous (Request/Response) | RBTASKNOTIFYONCOMPLETEREQ | RBTASKNOTIFYONCOMPLETERES |
| Search Task(RB_TASK_SEARCHTASK) | Synchronous | RBTASKSEARCHREQ | RBTASKSEARCHRES |
| Get a List of Task Types (RB_TASK_TASKTYPELIST) | Synchronous | RBTASKTYPELISTREQ | RBTASKTYPELISTRES |
| Update Task Assignee (RB_TASK_UPDATEASSIGNEE ) | Synchronous | RB_TASK_UPD_ASGN_REQ | RB_TASK_RESULT_RES |
| Update Task Contact (RB_TASK_UPDATECONTACT ) | Synchronous | RB_TASK_UPD_CNTCT_REQ | RB_TASK_RESULT_RES |
| Update Task Header (RB_TASK_UPDATEHEADER) | Synchronous | RB_TASK_UPD_HDR_REQ | RB_TASK_RESULT_RES |
| Update Task Note (RB_TASK_UPDATENOTE ) | Synchronous | RB_TASK_UPD_NOTE_REQ | RB_TASK_RESULT_RES |
| Update Task Transaction (RB_TASK_UPDATETRANSACTION) | Synchronous | RB_TASK_UPD_TXN_REQ | RB_TASK_RESULT_RES |

## Call Report Web Service

PeopleSoft CRM delivers these service operations for the Call Report web service:

- Create Call Report

  This service operation is a synchronous process that takes these inputs to create a call report: subject and event type (user maintained, some values are MTG, PHON, and OTHE) for the call report.

  Optionally, you can supply information on contacts, transactions, and notes to be included in the call report. For each of the optional information you want to add to the call report, these values are required as inputs:

  - (For Contact) Person ID.

    Make sure that the person ID entered is valid for the call report creation.

  - (For Transaction) Transaction type, transaction market, and transaction SYNC ID.

  - (For Note) Note summary.

  This service operation returns the ID of the call report once it is created successfully.

- Get Call Report

  This service operation is a synchronous process that takes the call report ID and returns the call report and its detailed information (if the ID is valid). It returns an empty result set if the ID is not valid.

  ---

  **Note.** In order to get results successfully, the current user must have access to that call report (as defined by the call report dataset rule RD_CR_LIST_TXN).

  ---

- Search Call Report

  This service operation is a synchronous process that takes at least one of these inputs to find and return call reports that match the search criteria:

  - Call report ID.

  - Call report subject.

  - Call report date.

  - Call report type.

  - Call report location.

  You can also specify the call report related task ID and application usage as additional criteria. This service operation returns one or more call reports that satisfy the search criteria. It returns an empty result set if it cannot find any call report matching the search criteria. The RB_MORERES_FLAG flag is set to *True* if more than 300 call reports are found.

  ---

  **Note.** In order to get search results successfully, the current user must have access to them (as defined by the call report dataset rule RD_CR_LIST_TXN).

  ---

- Update Call Report Header

  This service operation is a synchronous process that takes the call report ID and attributes that you want to update in the call report, which can be:

  - Call report event type (user defined).
  - Call report subject.
  - Call report date.
  - Call report location.
  - Application usage (for example, ALL = All Applications; CHMG = Change Management; FLDS = Field Service; HLPD = HelpDesk; PIM = Personal Information Mgmt; SSP = Strategic Planning; SALS = Sales; SUPP = Support).

  ---

  **Note.** In order to update a call report header, the current user must have access to that call report (as defined by the dataset rule RD_CR_LIST_TXN).

  ---

  At the end of the operation, the system returns three pieces of information in the response message: Call Report ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

- Update Call Report Contact

  This service operation is a synchronous process that takes these inputs to add, delete, or update call report contacts:

  - Call report ID.
  - Contact Person ID.

    Make sure that the person ID entered is valid for the call report creation.
  - Update action (ADD = Add; DEL = Delete; UPD = Update).

  ---

  **Note.** In order to add, update, or delete a call report contact, the current user must have access to that call report (as defined by the dataset rule RD_CR_LIST_TXN).

  ---

  You can specify these attributes as inputs when you add or update contacts: contact BO ID, contact role type ID, customer BO ID (make sure that the ID is valid), customer role type ID, and primary indicator (Y/N).

  ---

  **Note.** Note that you can only have one primary contact in a call report. Therefore, if you specify a contact that you add or update as primary, the rest of the contacts in the same call report have their primary contact flag set to N.

  ---

  At the end of the operation, the system returns three pieces of information in the response message: Call Report ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

- Update Call Report Note

  This service operation is a synchronous process that takes these inputs to add, delete, or update call report notes:

  - Call report ID.
  - Note's Sequence number.

    If you add a new note, the system assigns the next available sequence number to the new note and ignores the one that is supplied is ignored.

  - Update action (ADD = Add; DEL = Delete; UPD = Update).

  ---

  **Note.** In order to add, update, or delete a call report notes, the current user must have access to that call report (as defined by the call report dataset rule RD_CR_LIST_TXN). You can specify these attributes as inputs when you add or update notes: note summary, start date, end date, and description.

  ---

  At the end of the operation, the system returns three pieces of information in the response message: Call Report ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

- Update Call Report Transaction

  This service operation is a synchronous process that takes these inputs to add or delete call report transactions:

  - Call report ID.
  - Transaction type (transaction types are user defined, for example, COMPANY, LEAD, OPPRT, and PARTNER).
  - Update action (ADD = Add; DEL = Delete).
  - Transaction Market.
  - Transaction SYNC ID.

    This is the SYNC ID for the corresponding transaction type ID. Make sure that you enter a valid ID.

  ---

  **Note.** In order to add or delete a call report transaction, the current user must have access to that call report (as defined by the call report dataset rule RD_CR_LIST_TXN).

  ---

  In addition, you can specify a transaction as the primary one when you add or delete transactions. If you specify one transaction in the call report as primary (flag set to Y), the system sets this flag to N for other transactions in the call report as there can only be one primary transaction in a call report.

  At the end of the operation, the system returns three pieces of information in the response message: Call Report ID that was passed in the request message, return code (0 if operation was successful; 1 if failed), and a return message explaining details of the error.

This table provides the technical names, operation type, and messages names of the service operations that are related to the Call Report web service:

| Service Operation | Operation Type | Request Message | Response Message |
|---|---|---|---|
| Create Call Report(RD_CALL_REPORT_CREATE) | Synchronous | RD_CALL_REPORT_CREATE_REQ | RD_CALL_REPORT_CREATE_RES |
| Get Call Report (RD_CALL_REPORT_GET) | Synchronous | RD_CALL_REPORT_GET_REQ | RD_CALL_REPORT_GET_RES |
| Search Call Reports(RD_CALL_REPORT_SEARCH) | Synchronous | RD_CALL_REPORT_SEARCH_REQ | RD_CALL_REPORT_SEARCH_RES |
| Update Call Report Header(RD_CALL_REPORT_UPDATEHEADER) | Synchronous | RD_CALL_REPORT_UPD_HDR_REQ | RD_CALL_REPORT_RESULT_RES |
| Update Call Report Contact(RD_CALL_REPORT_UPDATECONTACT) | Synchronous | RD_CALL_REPORT_UPD_CNTCT_REQ | RD_CALL_REPORT_RESULT_RES |
| Update Call Report Note(RD_CALL_REPORT_UPDATENOTE) | Synchronous | RD_CALL_REPORT_UPD_NOTE_REQ | RD_CALL_REPORT_RESULT_RES |
| Update Call Report Transaction (RD_CALL_REPORT_UPDATETRANS) | Synchronous | RD_CALL_REPORT_UPD_TXN_REQ | RD_CALL_REPORT_RESULT_RES |

## Contact Web Service

PeopleSoft CRM delivers these service operations for the Contact web service (RBP_CONTACT_SVC):

**Note.** This web service is delivered for the integration with Microsoft Exchange and Outlook.

- Get Contacts (RBP_CNT_GET_SYNC)

  This service operation is a synchronous process that takes a PeopleSoft user ID and the last sync date time (SyncAnchor) and returns PeopleSoft contacts that were added or modified for that user since the sync date time. If no contacts have been added or modified, an empty results set will be returned.

- Update Contact (RBP_CNT_UPD_SYNC)

  This service operation is a synchronous process that takes a sync user ID, unique record identifier (UID), and contact details including first and last names, phones, addresses and email address. The contact specified is updated and the updating user ID is returned, along with the Category of *Peoplesoft.*

This table provides the technical names, operation type, and messages names of the service operations that are related to the Contact web service:

| ***Service Operation*** | ***Operation Type*** | ***Request Message*** | ***Response Message*** |
|---|---|---|---|
| Get Contacts (RBP_CNT_GET_SYNC) | Synchronous | RBP_CNT_ID_REQ | RBP_CNT_GET_RES |
| Update Contact (RBP_CNT_UPD_SYNC) | Synchronous | RBP_CNT_UPD_REQ | RBP_CNT_UPD_RES |

### *See Also*

Chapter 25, "Working with Exchange Integration," Understanding PeopleSoft CRM and Microsoft Exchange Integration, page 459

## Calendar Web Service

PeopleSoft CRM delivers these service operations for the Calendar web service (RBP_CALENDAR_SVC):

**Note.** This web service is delivered for the integration with Microsoft Exchange and Outlook.

- Get Calendar (RBP_CALENDAR_GET_SYNC)

  This service operation is a synchronous process that takes a PeopleSoft user ID and the last sync date time (SyncAnchor) and returns PeopleSoft calendar entries that were added or modified for that user since the last sync date time. If no calendars have been added or modified, an empty results set will be returned.

- Add Calendar (RBP_CALENDAR_ADD_SYNC)

  This service operation is a synchronous process that takes a sync user ID, calendar owner user ID, and calendar details including meeting start and end date times, subject, meeting type, recurrence pattern and invitees. The calendar entry is created if the sync user ID and owner user ID are identical.

- Update Calendar (RBP_CALENDAR_UPDATE_SYNC)

  This service operation is a synchronous process that takes a sync user ID, calendar owner user ID, unique record identifier (UID), and calendar details including meeting start and end date times, subject, meeting type, recurrence pattern and invitees. The calendar specified is updated and the unique identifier is returned if the update was successful.

- Delete Calendar (RBP_CALENDAR_DELETE_SYNC)

  This service operation is a synchronous process that takes a sync user ID, calendar owner user ID, unique record identifier (UID), and sets the meeting to be cancelled in PeopleSoft if the sync user ID is same as the owner user ID. If the sync user ID is not the same as the owner user ID, that means the sync user is an invitee and the invitee status is then set to *Declined.* The return is *True* if the operation was successful.

This table provides the technical names, operation type, and messages names of the service operations that are related to the Calendar web service:

| ***Service Operation*** | ***Operation Type*** | ***Request Message*** | ***Response Message*** |
|---|---|---|---|
| Get Calendar (RBP_CALENDAR_GET_SYNC) | Synchronous | RBP_CALENDAR_GET_REQ | RBP_CALENDAR_GET_RES |
| Add Calendar (RBP_CALENDAR_ADD_SYNC) | Synchronous | RBP_CALENDAR_ADD_REQ | RBP_CALENDAR_ADD_RES |
| Update Calendar (RBP_CALDENDAR_UPDATE_SYNC) | Synchronous | RBP_CALENDAR_UPDATE_REQ | RBP_CALENDAR_UPDATE_RES |
| Delete Calendar (RBP_CALENDAR_DELETE_SYNC) | Synchronous | RBP_CALENDAR_DELETE_REQ | RBP_CALENDAR_DELETE_RES |

### *See Also*

Chapter 25, "Working with Exchange Integration," Understanding PeopleSoft CRM and Microsoft Exchange Integration, page 459

## Viewing Message Elements for Tasks and Call Reports

You can view the elements and fields that are included in each operation message for Task and Call Report web services through PeopleTools.

To view a list of field names and aliases for a particular message:

1. Select PeopleTools, Integration Broker, Integration Setup, Messages.
2. Enter *RB_TASK* in the Message Name field and click Search. The system lists all the messages that are related to the Task web service.

   To view messages that are related to the Call Report web service, enter *RD_CALL_REPORT* in the Message Name field.
3. Select the message you want to view.
4. Click the message name link under the Parts grid.

   The system opens the Message Definition page in a new browser.
5. Click the plus sign next to the table name at the bottom of the page to view the fields and aliases associated with the message.

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## Symbols



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