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PeopleSoft Sales for Handhelds 9.1 PeopleBook

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PeopleSoft Sales for Handhelds 9.1 PeopleBook
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Contents

Oracle's PeopleSoft CRM Sales for Handhelds Preface

This preface discusses:

- PeopleSoft application fundamentals.

- PeopleSoft automation and configuration tools.

- PeopleSoft services foundation.

- PeopleSoft Sales.

- Additional resources.

- PeopleTools PeopleBooks.

PeopleSoft Application Fundamentals

The *PeopleSoft Sales for Handhelds 9.1 PeopleBook* provides implementation and processing information for PeopleSoft Sales for Handhelds. However, additional essential information describing the setup and design of the system appears in a companion volume of documentation called *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook.* Each PeopleSoft product line has its own version of this documentation.

The *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire PeopleSoft CRM system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Oracle's PeopleSoft CRM Application Fundamentals 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 CRM applications. This is an essential companion to the application PeopleBook.

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

- Correspondence management.

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

- Automation tools.

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

- Configuration tools.

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

- Knowledge management.

  This part discusses the setup of Verity search.

- Business process management.

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

  - The setup of the Business Process Execution Language (BPEL) infrastructure to initiate and manage BPEL process instances.

  - The setup of Business Process Monitor to view the status information of initiated BPEL process instances.

  - The setup of BPEL worklist integration to send CRM worklist entries (both notifications and action items) from BPEL processes.

  - The setup and execution of business projects.

See Also

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

PeopleSoft Services Foundation

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

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

- Entitlement management.

  This part discusses how solution management enables users to establish a set of predefined solutions that call center agents and field service technicians use to resolve customer problems.

- Transaction Billing Processor Integration.

  This part discusses how PeopleSoft Transaction Billing Processor enables PeopleSoft FieldService, PeopleSoft Support, and PeopleSoft Order Capture to integrate with PeopleSoft Billing and PeopleSoft General Ledger through the use of the PeopleSoft Contracts architecture. Also covered is how this integration enables PeopleSoft CRM users to bill and book revenue for recurring, one-time, and on demand service.

- Environmental Systems.

  This part covers the Research Institute (ESRI) integration. The integration with ESRI, a mapping software, enables users to view the location of reported cases and the location of field service activities through the Map Dashboard.

See Also

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

PeopleSoft Sales

PeopleSoft Sales enables you to:

- Leverage the right channels, resources, and offerings to differentiate your business from others and prevail over the competition.

- Motivate and track sales performance using metrics-driven planning and compensation tools.

- Increase operational efficiency by integrating sales processes across the enterprise.

- Extend your sales reach through partners and other channels.

- Maximize sales productivity and build profitable, loyal customer relationships.

See Also

PeopleSoft Sales 9.1 PeopleBook, "Oracle's PeopleSoft CRM Sales Preface"

Additional Resources

The following documentation resources are essential to the successful implementation of PeopleSoft Sales for Handhelds:

- AMPower Sales Application for Oracle PeopleSoft for Palm User Guide

- AMPower Sales Application for Oracle PeopleSoft for BlackBerry User Guide

- AMPower Sales Application for Oracle PeopleSoft for Windows Mobile User Guide

- AMPower Sales Application for Oracle PeopleSoft for Palm Demo Guide

- AMPower Sales Application for Oracle PeopleSoft for BlackBerry Demo Guide

- AMPower Sales Application for Oracle PeopleSoft for Windows Mobile Demo Guide

Contact your representative from Antenna Software to get access to these documentation.

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.

Chapter 1

Getting Started with PeopleSoft Sales for Handhelds Application

This chapter provides an overview of PeopleSoft Sales for Handhelds and discusses:

*   PeopleSoft Sales for Handhelds integrations.

*   PeopleSoft Sales for Handhelds implementation.

Note. This book focuses on the setup and usage of the mobile functionality and does not discuss core PeopleSoft CRM setup or usage. Review the references that are provided in each chapter before beginning the implementation.

PeopleSoft Sales for Handhelds Overview

AMPower Sales Application for PeopleSoft CRM (also known as PeopleSoft Sales for Handhelds) extends the sales application functionality on a supported mobile handheld device. It allows sales managers and representatives to access and manage sales information on the road in real time. Sales personnel can add and edit leads, opportunities, contacts, and companies; work on tasks; view call reports; and manage their accounts on the handheld device. Changes that they make on the device are synchronized to the PeopleSoft system automatically. The update is near instantaneous if users are in the coverage area of the wireless network.

PeopleSoft Sales for Handhelds Integrations

The Sales for Handhelds application is built by Antenna Software to provide near real-time enterprise data access to mobile sales users through handheld devices. Component interfaces (CIs) facilitate data synchronization between the PeopleSoft database and mobile handheld devices.

See and Chapter 2, "Working with PeopleSoft Sales for Handhelds," Delivered Component Interfaces, page 3.

PeopleSoft Sales for Handhelds Implementation

While both the installation and the majority of configuration for the Sales for Handhelds application are done on the third-party platform, several setup tasks remain to be performed in the PeopleSoft CRM system, which include the setup of dataset rules, dataset roles and system options. System data is delivered for these tasks so that implementers are not required to perform them in order to get the system up and running.

Note. PeopleSoft Sales for Handhelds runs on top of the PeopleSoft Sales application.

See and

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

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

Chapter 2

Working with PeopleSoft Sales for Handhelds

This chapter provides an overview of PeopleSoft Sales for Handhelds and discusses how to perform CRM-specific setup for the application.

Understanding PeopleSoft Sales for Handhelds

This section discusses:

• Delivered component interfaces.

• Customization considerations.

• Data distribution and security.

Built by Antenna Software, PeopleSoft Sales for Handhelds provides real-time access and synchronization of sales data between PeopleSoft CRM and handheld devices that it supports. It helps salespeople who are constantly on the road to collect the latest information about customers and work on deals when they are away from laptops, network, and WiFi connections.

Consult Antenna documentation for more information on features and functionality of the Sales for Handhelds application.

See and "Oracle's PeopleSoft CRM Sales for Handhelds Preface," Additional Resources, page vii.

Delivered Component Interfaces

PeopleSoft CRM provides real-time synchronous access of data and business rules through component interfaces (CIs). These CIs are exposed as web services, which allow an external system to access methods and properties that are defined in them and thus relay sales information that is received from or intended for handheld devices within the network.

To use these web services, the external system consumes, composes, and transmits Simple Object Access Protocol (SOAP) messages using Web Services Description Language (WSDL) documents that are generated for each CI. In Integration Broker, a node is defined for this integration and the Simple Object Access Protocol to CI (SOAPTOCI) message is activated to allow synchronous transactions.

PeopleSoft CRM delivers a list of CIs to provide efficient data update and distribution for various sales entities for both the CRM system and mobile handheld devices. They can be grouped into these categories:

- List component interfaces.

  These are responsible for pushing *all* the relevant entity information to the external system. They know which data records have been changed or added since the last synchronization. The shape of these CIs contains fields that are exposed on handheld devices. This design provides optimal performance because it reduces unnecessary handshaking that occurs during each synchronization transaction between the PeopleSoft and third-party platforms.

- Update/Create component interfaces.

  These CIs are responsible for synchronizing data records, which have been changed, back to the CRM system, particularly atomic transactions that involve the update and creation of data records from the handheld device. These CIs expose only essential fields that are shown and used in handheld devices.

- Metadata component interface.

  This CI exposes metadata attributes, such as the shape of the CIs, their properties, default values, and data types. It allows the external system to collect information about any given CI and its properties, and hence be able to react to certain code changes that may have been performed by a customer, for example, label changes.

- Lookup prompt component interface.

  Application data, for example, XLAT values (translate values), prompt tables and prompt values, are exposed through this CI.

- Sales user preferences component interface.

  This CI includes the user's global preferences, such as the sales business unit, person ID, and default currency code.

Component Interface Name	Type	Description
RIM_CDM_LIST Combined Contact and Company List Request	List	Returns a collection of contact, call report, and company information. Contacts and companies being sent down to the device are driven by the dataset rules that are defined for each mobile device user.
RIM_LE_OPP_LIST Combined Lead and Opportunity List Request	List	Returns a collection of lead and opportunity information. Leads and opportunities being sent down to the device are driven by the dataset rules that are defined for each mobile device user.
RIM_TASK_LIST Task List Request	List	Returns a collection of task information. Contacts and companies being sent down to the device are driven by the dataset rules that are defined for each mobile device user.
RIM_PERSON Contact Update/Create Request	Update/Create	Used to manage contact information. It enables the user to create or update contact information on the device and send it back to the server.
RIM_COMPANY Company Update/Create Request	Update/Create	Used to manage company information. It enables the user to create or update company information on the device and send it back to the server.

Component Interface Name	Type	Description
RIM_LEAD Lead Update/Create Request	Update/Create	Used to manage lead information. It enables the user to create or update lead information on the device and send it back to the server.
RIM_OPPORTUNITY Opportunity Update/Create Request	Update/Create	Used to manage opportunity information. It enables the user to create or update opportunity information on the device and send it back to the server.
RIM_TASK Task Update/Create Request	Update/Create	Used to manage task information. It enables the user to create or update task information on the device and send it back to the server.
RIM_CALL_REPORT Call Report Update/Create Request	Update/Create	Used to manage call report information. It enables the user to create or update call report information on the device and send it back to the server.
RIM_METADATA_CI Metadata Request	Metadata	Contains metadata information. This CI is used by the external system to determine metadata attributes of a CI.
RIM_SALES_LOOKUP Lookup/Pick List/Translate Values Request	Lookup Prompt	Contains system data, such as task types, state codes, country codes, and fallout reason codes for opportunities.
RIM_OPR_GBL_PREF Global Preference Request	Sales User Preferences	Contains the mobile device user's global preferences, such as the user's sales business unit, person ID, and default currency code.

See Also

PeopleTools 8.52: PeopleSoft Integration Broker PeopleBook

Customization Considerations

You can take advantage of the placeholder fields to support synchronization of additional data with minimum effort.

Placeholder Fields

PeopleSoft Sales for Handhelds provides 10 blank fields, each 70 characters long, at level 0 of each entity. As a customization effort, you can use them for displaying custom fields as well as delivered fields that were not exposed in the List CIs. For example, you can use a blank field to add the Campaign Name field to the Lead entity to suit your business needs.

These blank fields are delivered as read-only fields.

Here are the high level steps for enabling the use of placeholder fields in the application:

1. Open the target List CI in application designer.

2. Find the record of the placeholder field that you want to use, and add the desired label for that field.

3. Define the placeholder field label (in the Record Field label ID field) on the Record Field Properties dialog box.

4. Add RowInit code to populate the placeholder field.

Data Distribution and Security

Mobile handheld devices, compared to workstations, are limited in processing power and storage capacity. To enable efficient and secured data distribution from the CRM server to all handheld devices without causing potential system overload, PeopleSoft CRM performs role-based data filtering and data distribution for each device using datasets. Each CI is associated with a dataset to determine the set of data that is passed to handheld devices.

Datasets enable you to limit the amount of data and decide which set of data to download to each handheld device by associating dataset rules with dataset roles. Dataset rules specify data subsets in the CRM system. Dataset roles contain collections of dataset rules, which determine the final set of data that users of these roles get in their handheld devices when data synchronization occurs. The role-based data distribution mechanism provides the following benefits:

- Data Security.

  Sales lead information is often sensitive and is not shared by everyone in the organization. Dataset rules are the perfect tool to implement restrictive data access. For example, if you want lead owners to be able to see only the lead information, you can set up a dataset rule that passes leads to the handheld device only if its user is the owner of the lead. Other users will not see it even if they have the same role.

- Data Relevance.

  Handheld devices are limited in processing power and storage capacity; therefore, dataset rules need to be carefully designed so that users can access all the data that they need to be successful while not reaching the size limit. To achieve that, the maximum number of data instances to download to the devices are often specified as part of the setup for mobile data distribution setup. As a result, users are more likely to get a set of data that is useful and relevant to their job functions because they cannot afford to store unwanted data on their devices.

  For more information about mobile data distribution, refer to the chapter on using datasets in the *PeopleSoft 9.1 PeopleBook: Enterprise Components.*

Important! While you can modify the number of maximum entity data records (the limit by count value) to download for each entity, note that when you increase the number of downloaded records for one entity, you need to reduce this number for other entities down to a number that is manageable by your particular device. For example, if you use a 4MB BlackBerry device, we recommend that no more than 200 records in total be downloaded to this device.

In addition, be aware of the amount of data that is being sent to the device for entities such as companies and contacts. Each component interface has a limit by count value that is defined under Enterprise Components, Component Configurations, Mobile, Mobile Data Distribution. Data integrity issues to other objects can occur when these limits are breached.

For further discussion on mobile data distribution and datasets, refer to the datasets chapter that is available in the *PeopleSoft 9.1 PeopleBook: Enterprise Components.*

Performing CRM-Specific Setup for PeopleSoft Sales for Handhelds

This section discusses how to:

• Specify setup options. (optional)

• Set up dataset rules. (optional)

• Set up dataset roles. (optional)

• View synchronization statuses.

System administrators are responsible for performing these tasks.

Pages Used to Perform CRM-Specific Setup for PeopleSoft Sales for Handhelds

Page Name	Definition Name	Navigation	Usage
Handheld Setup Options	RIM_SETUP_OPTNS	Set Up CRM, Install, Handheld, Setup Options, Handheld Setup Options	Specify setup options that are used by the sales application for handheld devices.
Synchronization Status	RIM_SYNC_STATUS	Set Up CRM, Install, Handheld, Synchronization Status, Synchronization Status	View synchronization activities for users.

Specifying Setup Options (optional)

Access the Handheld Setup Options page (Set Up CRM, Install, Handheld, Setup Options, Handheld Setup Options).

Handheld Setup Options

Description	Handheld Default Options		*Version	1

Purchasing Option

☑ Bill To Customer
☑ Ship To Customer
☑ Sold To Customer

Address Purpose Type [37] 🔍 Mailing
Phone Purpose Type [11] 🔍 Business
Email Purpose Type [27] 🔍 Business

Level 1 Collection Options

Customize | Find | 🗗 | 🎬 First ◁ 1-10 of 10 ▷ Last

	Object Type	Collection Count		
1	Company Notes ▾	5	+	−
2	Call Report Notes ▾	5	+	−
3	Lead Notes ▾	5	+	−
4	Lead Quotes ▾	5	+	−
5	Lead Products ▾	5	+	−
6	Opportunity Quotes ▾	5	+	−
7	Opportunity Notes ▾	5	+	−
8	Opportunity Products ▾	5	+	−
9	Contact Notes ▾	5	+	−
10	Task Notes ▾	5	+	−

Handheld Setup Options page

Use this page to specify setup data, such as purchasing options and default contact method types to be used in the application. Due to limited storage space in the mobile device, you can specify the maximum number of level 1 rows to be downloaded for the corresponding entity. For example, if the collection unit is set to 5 for contact notes, only five of them will be downloaded to the device for the contact entity based on the last maintained synchronization date and time.

Note. PeopleSoft CRM delivers a setup option profile, *Handheld Default Options,* for the Sales for Handhelds application.

Description	Enter the setup option description.
Version	Displays *1,* which stands for the Sales and Handhelds application.

Purchasing Option	Select the purchasing options that apply to customers. Options are Bill To Customer, Ship To Customer, and Sold To Customer. When you add a customer on the handheld device, the customer will have the purchasing options that are selected here.
Address Purpose Type, Phone Purpose Type, and **Email Purpose Type**	Enter default contact method types to be used for addresses, phone numbers, and email addresses that are created on handheld devices.

Setting Up Dataset Rules (optional)

PeopleSoft CRM delivers five datasets for the Sales for Handhelds application, each of which contains a list of dataset rules that you can associate with dataset roles to delineate the final set of data to be downloaded for users of these roles.

To access datasets that are delivered for this application, navigate to Enterprise Components, Component Configurations, Datasets, Dataset Rules. The name of these datasets starts with the prefix *RIM*.

Refer to the *PeopleSoft 9.1 PeopleBook: Enterprise Components* for information on dataset rule setup.

Setting Up Dataset Roles (optional)

PeopleSoft CRM delivers two dataset roles, *RIM Sales Rep* and *RIM Sales Manager* for the Sales for Handhelds application. Each handheld device user must be assigned to one of the two roles in the PeopleSoft system before synchronization begins.

Note. To create or remove administrator privileges for specific roles, you must manually make changes to permission lists for the role or create new roles.

Refer to the *PeopleSoft 9.1 PeopleBook: Enterprise Components* for information on dataset role setup.

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

Viewing Synchronization Statuses

Access the Synchronization Status page (Set Up CRM, Install, Handheld, Synchronization Status, Synchronization Status).

This page provides the synchronization information for each selected user. On each row, it captures the entities and type of information being synchronized, and when the last synchronization occurred. It is for informational purposes only.

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