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# PeopleSoft CRM 9.1 Industry Application Fundamentals PeopleBook

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# Oracle's PeopleSoft CRM Industry Application Fundamentals Preface

This preface discusses:

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

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**Note.** All information found in this PeopleBook is applicable to PeopleSoft CRM for High Technology.

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## PeopleSoft Application Fundamentals

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

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

- CRM Multi-Product Foundation.  
This part discusses the design and setup of the PeopleSoft CRM system, including security considerations.
- Workforce Management.  
This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (AAF), business projects, and scripts.
- Interactions and 360-Degree Views.  
This part discusses how to manage interactions and set up and use the 360-degree view, a powerful tool that enables users to view and work with any transaction or interaction that is associated with a customer or worker.
- Self-Service for Customers.  
This part discusses how to set up, administer, and use self-service applications for customers and workers.
- Relationship Management.  
This part discusses how system users manage their contacts and tasks.

- Entitlement Management.

This part discusses setting up agreements and warranties.

- SmartViews.

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

### **See Also**

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

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## **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 your application *PeopleBook*.

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

- Correspondence management.

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

- Automation tools.

This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (AAF), business projects, 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.

### **See Also**

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*

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## PeopleSoft Services Foundation

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

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

- Solution management.

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

- Transaction Billing Processor Integration.

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

- Environmental Systems Research Institute (ESRI) integration.

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

### See Also

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

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

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## **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"

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## **PeopleTools PeopleBooks**

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

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## **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 CRM 9.1 Industry Applications

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

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

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## PeopleSoft CRM Industry Application Fundamentals Overview

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

- Setting up industry-specific tables.
- Setting up setIDs and roles.
- Working with products for communications and energy.
- Working with products for financial services and insurance.
- Setting up and maintaining arrangements and contracts.
- Working with business objects.
- Configuring application security for financial services.
- Working with financial accounts.
- Working with churn management.
- Working with fraud management.

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**Note.** This book documents the mechanics of setting up and using industry - specific 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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**See Also**

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*

*PeopleSoft CRM 9.1 Product and Item Management PeopleBook*

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*

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## PeopleSoft CRM 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 set up the components and enter data into them.

- Links to the corresponding PeopleBook documentation.

**See Also**

*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*

*PeopleTools 8.52: PeopleSoft Setup Manager PeopleBook*

*PeopleTools 8.52: PeopleSoft Component Interfaces PeopleBook*

## Chapter 2

# Understanding PeopleSoft CRM Industry-Specific Applications

This chapter discusses:

- CRM industry-specific application design.
- CRM industry-specific documentation structure.
- Documentation roadmap.

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## PeopleSoft CRM Industry-Specific Application Design

Because the structure of the industry-specific documentation is similar to the design of the applications, the best way to understand the documentation is to review the design of the application itself.

For example, the financial services extension is built on the core products of Marketing, Sales, Service, and Customer Analytics.

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## PeopleSoft CRM Industry-Specific Documentation Structure

Like the applications, the documentation for industry-specific applications consists of two parts: the core application books and a separate industry-specific book.

### ***Core Documentation***

The documentation for the core products in PeopleSoft CRM, such as Marketing, Sales, or Service, describes the setup and functionality applicable to all implementations. Thus, while it describes the core set of tools that you can use for your implementation, it doesn't discuss the industry-specific features that have been set up for you. For information about how PeopleSoft has extended core capabilities to meet your requirements, refer to the industry-specific documentation.

### ***Industry-Specific Documentation***

Just as industry-specific extensions in the application address specific industry needs, the industry-specific information in this documentation covers functionality that applies only to those industries. This includes:

- Business objects

- Sites and service locations
- Churn
- Fraud
- Business projects
- Products and services
- Case management
- Self-service

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## Documentation Roadmap

The core and the industry-specific documentation complement each other, therefore, it is important to read both sets of documentation.

### ***What to Read When***

You can approach the documentation in the following way:

- If a process setup is shared between the core application and the industry-specific extension, read the core documentation first and then the industry-specific extension documentation.

For example, case management is a feature that you first define in the core application and then often continue in the industry-specific extension, because most industry-specific extensions have some type of case management functionality. You would first read the case management information in the core documentation, and then the case management chapter in the industry-specific extension documentation.

- If a process is set up only in the core application, read the core documentation.
- If a process is set up only in the industry-specific extension, read the industry-specific extension documentation.

The chapters following this chapter provide details on industry-specific functions and processes. When the industry-specific extension uses core functionality as delivered, you will see a link to the core documentation.

## Chapter 3

# Understanding Industry Solutions

This chapter introduces the main concepts for industry solutions and discusses business processes for:

- Communications.
- Financial services.
- Government.
- Energy.
- High Technology.

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**Note.** Financial Services includes banking financial services, insurance, and wealth management.

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## PeopleSoft CRM Industry Solutions

PeopleSoft industry solutions provide deep industry functionality that integrates easily with existing applications and solutions. All PeopleSoft CRM industry solutions are built on three key functional areas:

- Extended and enhanced data models.

Data models support the unique data needs of different industries. These models include product data models, which enable you to define products and services based on your industry business model, and customer data models, which not only capture industry-specific attributes but also support one-to-one, one-to-many, and many-to-many relationships.

Customer data models provide insight into the roles and relationships that a customer has so that you have a complete understanding of their total value. For example, when insight into a customer's consumer and commercial accounts is combined with other entities that are associated with those accounts, a financial institution can make better decisions regarding retention and cross-selling strategies.

- Prebuilt business processes.

Prebuilt business processes reflect the core transactional needs of different vertical industries. Via an easy-to-use graphical interface, users have the ability to configure these business processes and rules to work the way they need them to. They can be simply configured within PeopleSoft by a business user without writing or modifying any code or having to depend on IT for assistance. Examples of these prebuilt business processes include:

- Service activation.
  - Order prequalification.
  - Complex and simple service configuration.
  - Claims and policy administration.
  - First notice of loss submissions.
  - Phone number assignments.
- Prebuilt integration and integration points.

Prebuilt integration and integration points at the process and data level. PeopleSoft integrates businesses processes across the front office and into the back office, offers a robust architecture for integrating applications and data, and leverages existing technology investments. The PeopleSoft Integration Broker provides prebuilt Enterprise Integration Points (EIP) that can retrieve data from legacy systems at runtime, unify and display the data, manipulate it, and send it back to the source.

For example, insurance organizations can seamlessly integrate the solution to back office policy and claims management systems. This capability provides tremendous advantages for vertical industries in terms of solution deployment and cost, the ability to leverage existing technology, ongoing cost of ownership, and quality of customer service.

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## PeopleSoft CRM Communication Solution

The communications solution is a comprehensive suite of industry-specific business processes that enables wireline, wireless, broadband, satellite, cable, media, and content service providers to improve operational efficiency, increase average revenue per user, and retain loyal customers.

### Business Processes for Communications

To address these opportunities, PeopleSoft offers the following targeted solution sets:

- Order Management for Communications
- Contact Center for Communications
- Partner Management for Communications

### **Order Management for Communications**

To optimize margins, communications companies must configure complex products and services, process orders quickly and accurately, and accelerate service activation. Order Management for Communications delivers a comprehensive solution set for handling the order-to-cash process. It supports industry-specific needs such as convergent product and service bundles, subscription management, pre-order qualification, billing integration, billing account assignment and creation, dispute management, change orders, and phone number assignment.

This table displays the business processes targeted by Order Management for Communications and provides links to relevant PeopleBooks:

<b>Business Process</b>	<b>Reference</b>
Order Capture	See <i>and PeopleSoft CRM 9.1 Order Capture Applications PeopleBook</i> , "PeopleSoft Order Capture."
Order Capture Self-Service	See <i>and PeopleSoft CRM 9.1 Order Capture Applications PeopleBook</i> , "PeopleSoft Order Capture Self Service."
Bill Presentment and Account Management	See <i>and PeopleSoft Bill Presentment and Account Management 9.1 PeopleBook</i> , "Setting Up Billing Integration for the Communication and Energy Industries."
Service Management	See <i>and PeopleSoft CRM 9.1 Order Capture Applications PeopleBook</i> , "Working with PeopleSoft Service Management."
Phone Number Administration	See <i>and PeopleSoft Number Management 9.1 PeopleBook</i> , "Getting Started with PeopleSoft Number Management."

### **Contact Center for Communications**

Contact Center for Communications allows communication organizations to enhance performance and control costs by delivering world-class service across multiple contact channels.

It includes support for industry-specific needs such as churn management and verification of SLAs and entitlements. PeopleSoft also provides a seamless front end to the complexity of legacy billing applications. This feature is critical for service providers, because on average, more than 70 percent of their incoming calls are account or billing related. Agents can see all a caller's related accounts, view and update account information, view bills and bill information, and handle charge disputes. PeopleSoft's prebuilt billing integration reduces implementation costs and speeds return on investment.

This table displays the business processes targeted by Contact Center for Communications and provides links to relevant PeopleBooks:

<b>Business Process</b>	<b>Reference</b>
Support	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Business Processes."

<b>Business Process</b>	<b>Reference</b>
Support Self-Service	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Self-Service Application."
Bill Presentment and Account Management	See <i>and PeopleSoft Bill Presentment and Account Management 9.1 PeopleBook</i> , "Setting Up Billing Integration for the Communication and Energy Industries."

**Partner Management for Communications**

Partner Management for Communications enables enterprises to collaborate with partners, including retail outlets, distributed content providers, or service resellers. As a platform to plan, execute, and manage partner programs, it supports processes necessary to model and profile partners, manage security, drive leads to third-party distribution channels, allow for agent activation of services, and allow partners to interact with an enterprise effectively.

This table displays the business processes targeted by Partner Management for Communications and provides links to relevant PeopleBooks:

<b>Business Process</b>	<b>Reference</b>
Sales	See <i>and PeopleSoft Sales 9.1 PeopleBook</i> , "Oracle's PeopleSoft CRM Sales Preface."
Order Capture	See <i>and PeopleSoft CRM 9.1 Order Capture Applications PeopleBook</i> , "PeopleSoft Order Capture."
Services Management	See <i>and PeopleSoft CRM 9.1 Order Capture Applications PeopleBook</i> , "Working with PeopleSoft Service Management."
Phone Number Administration	See <i>and PeopleSoft Number Management 9.1 PeopleBook</i> , "Administering Phone Numbers."
Partner Platform	See <i>and PeopleSoft Partner Relationship Management 9.1 PeopleBook</i> , "Understanding PeopleSoft Partner Relationship Management."
Partner Sales	See <i>and PeopleSoft Partner Relationship Management 9.1 PeopleBook</i> , "Executing Partner Relationship Management Transactions."

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**PeopleSoft CRM Financial Services Solution**

The financial services solution provides a comprehensive suite of industry-specific business processes that enables banks, brokerage firms, and insurance companies to increase profitability, improve market position, and create strategic growth.

## Business Processes for Financial Services

To address these opportunities, PeopleSoft offers the following targeted solution sets:

- Multichannel Sales for Banking
- Contact Center for Banking
- Wealth Management
- Agent Sales for Insurance
- Contact Center for Insurance

### ***Multichannel Sales for Banking***

Multichannel Sales for Banking makes it possible to implement successful customer acquisition and retention strategies, including planning, designing, and executing multichannel marketing campaigns that are relevant, timely, and compelling. The solution enables customers, branch employees, and contact center agents to easily access product catalogs and information, select and configure product options, submit new account applications, track trailing documents, and more. Prebuilt integration allows a financial institution to more easily tie the financial services solution to legacy account management applications.

This table displays the business processes targeted by Multichannel Sales for Banking and provides links to relevant PeopleBooks:

<b><i>Business Process</i></b>	<b><i>Reference</i></b>
Sales	See <i>and PeopleSoft Sales 9.1 PeopleBook</i> , "Oracle's PeopleSoft CRM Sales Preface."
Strategic Account Planning	See <i>and PeopleSoft Strategic Account Planning 9.1 PeopleBook</i> , "Oracle's PeopleSoft CRM Strategic Account Planning Preface."
Order Capture	See <i>and PeopleSoft CRM 9.1 Order Capture Applications PeopleBook</i> , "PeopleSoft Order Capture."
Order Capture Self-Service	See <i>and PeopleSoft CRM 9.1 Order Capture Applications PeopleBook</i> , "PeopleSoft Order Capture Self Service."
Configurator	See <i>and PeopleSoft Advanced Configurator 9.1 PeopleBook</i> , "Getting Started with PeopleSoft Advanced Configurator."

### ***Contact Center for Banking***

Contact Center for Banking provides a robust, flexible customer data model that gives financial institutions a complete understanding of a customer's total value to the organization. It provides comprehensive service capabilities that include easy-to-use branch scripting, a robust solution advisor, advanced search tools, and a knowledgebase for fast problem resolution. In addition, it enables both customers and employees to execute various banking transactions easily.

This table displays the business processes targeted by Contact Center for Banking and provides links to relevant PeopleBooks:

<b>Business Process</b>	<b>Reference</b>
Support	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Business Processes."
Support Self-Service	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Self-Service Application."
Banking Transactions	See <i>and PeopleSoft Banking Transactions 9.1 PeopleBook</i> , "Getting Started with PeopleSoft Banking Transactions."

### **Wealth Management**

The Wealth Management solution set provides tools and technology to develop and build strong customer relationships with clients in both the high-net-worth and mass-affluent categories. Its comprehensive contact management, referral management, and risk management functionalities enable advisors to grow assets under management, increase profits, and improve customer loyalty. It also enables them to plan, create, and manage client sales and service goals.

This table displays the business processes targeted by Wealth Management and provides links to relevant PeopleBooks:

<b>Business Process</b>	<b>Reference</b>
Client Management	See <i>and PeopleSoft Client Management 9.1 PeopleBook</i> , "Getting Started with PeopleSoft Client Management."
Strategic Account Planning	See <i>and PeopleSoft Strategic Account Planning 9.1 PeopleBook</i> , "Oracle's PeopleSoft CRM Strategic Account Planning Preface."
Sales	See <i>and PeopleSoft Sales 9.1 PeopleBook</i> , "Oracle's PeopleSoft CRM Sales Preface."
SmartViews	See <i>and PeopleSoft Client Management 9.1 PeopleBook</i> , "Oracle's PeopleSoft CRM Client Management Preface."

### **Agent Sales for Insurance**

Agent Sales for Insurance improves agent and broker satisfaction and loyalty through information sharing, elimination of bottlenecks, and reduced errors. It provides rich functionality for leads, opportunities, forecasts, quotes, orders, territory management, and more. As a platform to plan, execute, and manage partner programs, it includes the processes necessary for modeling and profiling partners, managing security, supporting self-service quoting on behalf of customers, and allowing effective partner interaction.

This table displays the business processes targeted by Agent Sales for Insurance and provides links to relevant PeopleBooks:

<b>Business Process</b>	<b>Reference</b>
Policy Management	See <i>and PeopleSoft Policy and Claims Presentment 9.1 PeopleBook</i> , "Working with Policies."
Sales	See <i>and PeopleSoft Sales 9.1 PeopleBook</i> , "Oracle's PeopleSoft CRM Sales Preface."
Order Capture	See <i>and PeopleSoft CRM 9.1 Order Capture Applications PeopleBook</i> , "PeopleSoft Order Capture."
Configurator	See <i>and PeopleSoft Advanced Configurator 9.1 PeopleBook</i> , "Getting Started with PeopleSoft Advanced Configurator."
Partner Platform	See <i>and PeopleSoft Partner Relationship Management 9.1 PeopleBook</i> , "Executing Partner Relationship Management Transactions."
Partner Sales	See <i>and PeopleSoft Partner Relationship Management 9.1 PeopleBook</i> , "Executing Partner Relationship Management Transactions."
Partner Commerce	See <i>and PeopleSoft Partner Relationship Management 9.1 PeopleBook</i> , "Executing Partner Relationship Management Transactions."

### **Contact Center for Insurance**

Contact Center for Insurance enables health, life, and property and casualty providers to retain good customers by ensuring that they experience convenient, consistent, and positive service. Its 360-degree customer view unifies legacy data—including policy, claims, and billing information—and helps prioritize services and resources for the most profitable and important customers. The solution also includes support for insurance-specific service and fulfillment requests, such as capturing first notice of loss, updating policy information, checking claims status, and more.

This table displays the business processes targeted by Contact Center for Insurance and provides links to relevant PeopleBooks:

<b>Business Process</b>	<b>Reference</b>
Policy and Claims Presentment	See <i>and PeopleSoft Policy and Claims Presentment 9.1 PeopleBook</i> , "Getting Started with PeopleSoft Policy and Claims Presentment."
Support	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Business Processes."
Support Self-Service	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Self-Service Application."

<b>Business Process</b>	<b>Reference</b>
Bill Presentment and Account Management	See <i>and PeopleSoft Bill Presentment and Account Management 9.1 PeopleBook</i> , "Getting Started with PeopleSoft Bill Presentment and Account Management."
Partner Platform	See <i>and PeopleSoft Partner Relationship Management 9.1 PeopleBook</i> , "Understanding PeopleSoft Partner Relationship Management."
Partner Service	See <i>and PeopleSoft Partner Relationship Management 9.1 PeopleBook</i> , "Executing Partner Relationship Management Transactions."

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## PeopleSoft CRM Government Solution

Worldwide, government agencies are facing pressures on a number of fronts. Due to the private sector's CRM initiatives, the public has come to expect a much higher level of convenience, availability, and reliability from government products and services. At the same time, governments of all sizes are burdened with shrinking budgets, disconnected systems, and business processes that make it impossible to share information, leverage efficiencies, and meet constituent expectations. The answer is industry-specific business processes that will enable governments to create constituent-focused organizations, improve service levels, and operate with greater efficiency.

### Business Processes for Government

To address these opportunities, PeopleSoft offers the following targeted solution sets:

- Revenue Management for Government
- Constituent Services for Government
- Constituent Outreach for Government

#### ***Revenue Management for Government***

Revenue Management for Government provides an integrated solution for multichannel order processing that is designed for agencies that are focused on revenue-generating activities such as taxes, licenses and permits, educational materials, tourism, and more. It enables agencies to plan and manage targeted campaigns for relevant offers by providing a robust and configurable product data model, along with capabilities for guided selling, product configuration, and order capture.

This table displays the business processes targeted by Revenue Management for Government and provides links to relevant PeopleBooks:

<b>Business Process</b>	<b>Reference</b>
Marketing	See <i>and PeopleSoft CRM 9.1 Marketing Applications PeopleBook</i> , "Getting Started with PeopleSoft Marketing."
Support	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Business Processes."
Support Self-Service	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Self-Service Application."
Order Capture	See <i>and PeopleSoft CRM 9.1 Order Capture Applications PeopleBook</i> , "Getting Started with PeopleSoft CRM Order Capture Applications."

### **Constituent Services for Government**

Constituent Services for Government gives intake workers, case workers, practitioners, and service delivery workers tools to deliver personalized service and keep support processes running efficiently. A variety of problem-solving tools provided within a multichannel framework improve contact center productivity, while integration with leading geographic information systems helps manage field service organizations with greater efficiency.

This table displays the business processes targeted by Constituent Services for Government and provides links to relevant PeopleBooks:

<b>Business Process</b>	<b>Reference</b>
Support	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Business Processes."
Support Self-Service	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Self-Service Application."
FieldService	See <i>and PeopleSoft Integrated FieldService 9.1 PeopleBook</i> , "Getting Started with PeopleSoft Integrated FieldService."

### **Constituent Outreach for Government**

The Constituent Outreach for Government solution set offers a full range of applications that allows you to plan, execute, and manage coordinated outreach and awareness campaigns across a wide range of contact channels, including direct mail, email, web, and phone. The system allows you to develop and manage event-driven, personalized dialogs with your constituents that provide consistent communications over time and across channels. It also provides state-of-the-art capabilities for segmentation, list management, campaign workflow, campaign optimization, and campaign effectiveness reporting.

This table displays the business processes targeted by Constituent Outreach for Government and provides links to relevant PeopleBooks:

<b>Business Process</b>	<b>Reference</b>
Marketing	See <i>and PeopleSoft CRM 9.1 Marketing Applications PeopleBook</i> , "Oracle's PeopleSoft CRM Marketing Applications Preface."
Online Marketing	See <i>and PeopleSoft Online Marketing 9.1 PeopleBook</i> , "PeopleSoft Online Marketing User Guide."
Telesales	See <i>and PeopleSoft CRM 9.1 Marketing Applications PeopleBook</i> , "Using PeopleSoft TeleSales."

## PeopleSoft CRM Energy Solution

The energy solution is a comprehensive suite of industry-specific business processes that enable regulated utilities, distributors, and retailers to gain a complete understanding of every customer—resulting in greater revenues, cost containment, and competitive advantage.

### Business Processes for Energy

To address these opportunities, PeopleSoft offers the Contact Center for Energy solution set.

#### Contact Center for Energy

To thrive in a highly competitive environment, energy companies need to create a customer-centric approach to support interactions. Contact Center for Energy delivers this capability through a real-time, 360-degree customer view. The solution includes support for industry-specific needs, including robust premise management functionality that allows companies to model the relationships between customers, premises, service points, and assets. It enables organizations to improve customer service through account management and bill presentment capabilities and automates field service order management to ensure that problems are handled promptly and correctly.

This table displays the business processes targeted by Contact Center for Energy and provides links to relevant PeopleBooks:

<b>Business Process</b>	<b>Reference</b>
Order Capture	See <i>and PeopleSoft CRM 9.1 Order Capture Applications PeopleBook</i> , "PeopleSoft Order Capture."
Support	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Business Processes."
Bill Presentment and Account Management	See <i>and PeopleSoft Bill Presentment and Account Management 9.1 PeopleBook</i> , "Getting Started with PeopleSoft Bill Presentment and Account Management."

## PeopleSoft CRM High Technology Solution

CRM for High Technology is a comprehensive suite of industry-specific business processes that enable software and consumer electronics companies to build profitable, long-term customer relationships, improve operational efficiencies, and leverage service as a differentiator and revenue driver.

### Business Processes for High Technology

To address these opportunities, PeopleSoft offers the following targeted solution sets:

- Multichannel Sales for High Technology
- Contact Center for High Technology

#### ***Multichannel Sales for High Technology***

This table displays the business processes targeted by Multichannel Sales for High Technology and provides links to relevant PeopleBooks:

<b><i>Business Process</i></b>	<b><i>Reference</i></b>
Marketing	See <i>and PeopleSoft CRM 9.1 Marketing Applications PeopleBook</i> , "Getting Started with PeopleSoft Marketing."
Online Marketing	See <i>and PeopleSoft Online Marketing 9.1 PeopleBook</i> , "Getting Started with PeopleSoft Online Marketing."
Sales	See <i>and PeopleSoft Sales 9.1 PeopleBook</i> , "Getting Started with PeopleSoft Sales."
Order Capture	See <i>and PeopleSoft CRM 9.1 Order Capture Applications PeopleBook</i> , "Getting Started with PeopleSoft CRM Order Capture Applications."
Order Capture Self-Service	See <i>and PeopleSoft CRM 9.1 Order Capture Applications PeopleBook</i> , "PeopleSoft Order Capture Self Service."

#### ***Contact Center for High Technology***

This table displays the business processes targeted by Contact Center for High Technology and provides links to relevant PeopleBooks:

<b><i>Business Process</i></b>	<b><i>Reference</i></b>
Support	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Getting Started with PeopleSoft CRM Call Center Applications."

<b>Business Process</b>	<b>Reference</b>
Support Self-Service	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Self-Service Application."
FieldService	See <i>and PeopleSoft Integrated FieldService 9.1 PeopleBook</i> , "Getting Started with PeopleSoft Integrated FieldService."
Quality	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Setting Up PeopleSoft Quality Management."

## Chapter 4

# Setting Up Industry-Specific Functionality

This section provides an overview of industry-specific functionality and discusses how to:

- Set up common industry functionality
- Set up insurance industry translate values
- Set up configuration tables for energy and communications
- Set up communications industry-specific tables
- Set up online application forms for FNOL

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## Understanding Industry-Specific Setup

Industry-specific setup consists of three setup steps:

- Core functionality required for the industry.
- Requirements common to all industry-specific installations.
- Requirements for your specific industry.

This chapter discusses the setup requirements for industry-specific functionality. The setup requirements for core functionality are discussed in the appropriate PeopleBooks.

## Requirements Applicable to All Industries

This section discusses:

- Roles and user IDs.
- Markets
- Industry-specific page setup.
- Industry-specific translate values.
- Attributes.
- Display templates.

### ***Roles and User IDs***

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.

Communications is delivered with four roles:

<b><i>Role</i></b>	<b><i>Definition</i></b>
CSP Admin	System administrator role with access to all functionality.
CSP Agent	Agent or customer service representative role with access to the agent view and customer support functionality.
CSP Self-Service	Self-service user with access to My View.
CSP Partner Representative	Communications Partner Representative with access to Billing Account and Order Capture functionality

Energy is delivered with three roles:

<b><i>Role</i></b>	<b><i>Definition</i></b>
ENERGY ADMIN	System administrator role with access to all functionality.
ENERGY AGENT	Agent or customer service representative role with access to the agent view and customer support functionality.
ENERGY SELFSERVICE	Self-service user with access to My View.

Financial services is delivered with three roles:

<b><i>Role</i></b>	<b><i>Definition</i></b>
FSI Administrator	System administrator role with access to all functionality.
FSI Agent	Agent or customer service representative role with access to the agent view and customer support functionality.
FSI Self Service	Self-service user with access to My View.

Insurance is delivered with three roles:

<b><i>Role</i></b>	<b><i>Definition</i></b>
Insurance Administrator	System administrator role with access to all functionality.
Insurance Agent	Agent or customer service representative role with access to the agent view and customer support functionality.

<b>Role</b>	<b>Definition</b>
Insurance Self Service	Self-service user with access to My View.

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

## **Markets**

PeopleSoft CRM industry applications are built on the core applications. Market is an attribute of every PeopleTools component that is used to enable the system to make components available to only certain industries. When developers add custom features to the copy of a core component that is going to be used for a specific industry, the component is marked with an industry market setting so that the system knows that both the component and the added custom features are specific to an industry application.

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

## **Industry-Specific Page Setup**

PeopleSoft CRM identifies a list of component pages that are used in both core and industry applications using the Industry-Specific Page Setup page. Set by market, each page setup definition includes information, such as the base page, menu name, item name, page name, record, base record, bar name, component name, page item name, and component interface name of the specified component page. The system uses this page setup data to facilitate the communication between applications.

## **Industry-Specific Translate Values**

Using industry-specific translate pages, you can set up field values for industry use without performing any development tasks in PeopleSoft Application Designer. As you open a page after the setup, depending on the market to which this opened page belongs, the industry-specific translate values (for drop-down list boxes with declared industry-specific translate values) appear.

See *and PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Field Values," Modifying Industry-Specific Translate Values.

## **Attributes**

Flexible attributes are a mechanism to extend the data model without changing the underlying table structure in the database. In the PeopleSoft system, objects can be configured to accept attributes. You can define an unlimited number of attributes for any object that is configured to accept attributes. The financial services, communications, and energy markets use attribute-enabled objects.

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

## ***Display Templates***

The introduction of display templates eliminates the need for component cloning. The idea is to make the look and feel of components entirely configurable using templates, so that they can potentially be used in any scenario. In the display template framework, only one version of a component exists. This component is a consolidation of all its variants and it consists of all the parts and pieces that can be manipulated. Each implementation that wants to present the component in its specific way creates a display template for the component. Through the display template, you can control the visibility of component pages and fields, alter section and field labels, apply field-level security and setup options that are available to the component.

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

## **Requirements for Financial Services**

This section discusses setIDs and autonumbering.

### ***Set IDs and Autonumbering***

Autonumbering is generally controlled by setID. 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.

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

## **Requirements for Insurance**

You can build web application forms for FNOL using form templates and configure them to meet your business needs.

See *and Chapter 18, "Working with Self Service Transactions for Insurance," Reporting an FNOL, page 195.*

## **Requirements for Communications**

This section discusses:

- Call center business unit setup.
- Label change.
- Service management.

### ***Call Center Business Unit Setup for Communications***

When setting up business units and setIDs for communications, consider that the minimum requirement for your setup is one setID with two business units, if you use fraud. If you do not use the fraud functionality, then one business unit is adequate.

Before you can set case defaults for call center for communications, you must set up the default values in the appropriate call center prompt table.

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**Note.** Communications has a fraud business project that is instantiated when a case with the type of *Fraud* is submitted. This functionality relies on call center applications events for business projects, which are delivered as disabled. To enable the Fraud business project, the call center events must be enabled.

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

### **Order Capture for Communications**

When you prepare Order Capture for communications, consider:

- The *RO\_COM* application class initiates the codes.
- Select Use Accounts to ensure that the entire communication Order Capture component is visible.
- The *COM\_PRICE* price list ID sets up the ability to have recurring costs.

This automatically links each new customer with a price list.

- Order Capture supports business event logic, in the form of application class sets. These events are used out-of-the-box in the communications industry.

### **Label Change**

The label change utility enables you to perform minor layout changes to core component pages for application-specific (core or industry alike) implementation without having to clone the associated components and pages. From the components that are modified to support the utility, you can change field labels, hide fields and pages, and switch the mode of pages to display-only. The label change utility does not work on pages that are not enabled to support the feature.

See *and PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Field Values," Understanding the Label Change Utility.

### **Service Management**

Service management provides the infrastructure to flow the submitted orders through to the appropriate operations support system applications for provisioning and activation using product actions and product-specific business projects.

See *and PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working with PeopleSoft Service Management."

## **Requirements for Energy**

This section discusses installed services used for energy related industries.

### **Installed Services**

The service management functionality provides the interface for the customer service representative (CSR) as well as the self-service user to initiate changes such as addition, replacement, or removal of features to an existing service. It also provides the interface to perform changes at the service level, such as disconnect service, suspend, and resume service.

Installed services represent physical assets such as electric meters and gas meters. These assets may be owned by the customer or the utility company. In addition, installed services can be associated with a site that is not attached to a customer. For example, a utility company installs assets (gas and electric meters) at a new housing development. Since the new homes have not been sold, there are no customers associated with the site or with the assets.

Using service points, you can define the actual service provided at the premise and the physical location of the equipment (asset) that controls the service. For example, the main power switch to a building constitutes a service point. However, you can only associate one service with a service point. For example, the electrical power switch outside a residential home can be associated with one service even if the switch is also used for commercial service.

Order Capture provides the functionality to automatically update an installed service record when the order capture process takes place, which is achieved by the three business project templates delivered in energy for Order Capture: *ENRGY\_START\_SVC*, *ENRGY\_STOP\_SVC*, and *ENRGY\_TRSFR\_SVC*.

Different capture types use different filters on the installed product record. For example, the start service and stop service templates require that all installed products active at a site be made available for the transaction. Similarly, the transfer service requires all installed products active at the current site and are eligible to be transferred to the new site, be made available for the transaction.

Installed services are used to set up a hierarchy between service and its service features for product packages. Having a well-defined relationship between service and service features is significant for service management because it dictates what features are available for a particular service. This parent - child structure is viewable through the Installed Product Hierarchy.

Installed service records display account information (captured during the order capture process) and pricing information (unit price & non-recurring pricing) used for the installed services. You can also view product attributes in the records, if attributes have been specified to display in the Installed Service component.

See *and PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working with PeopleSoft Service Management."

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

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## Setting Up Common Industry Functionality

This section discusses how to:

- Set up industry-specific pages.
- Set up industry-specific translate values.

## Pages Used to Set Up Common Industry Functionality

Page Name	Definition Name	Navigation	Usage
Industry-Specific Page Setup	RB_MKT_PAGE	Set Up CRM, Product Related, Industry, Industry-Specific Page Setup, Industry-Specific Page Setup	View a list of component pages that are used in the industry applications.
Industry-Specific Translates	RB_MKT_XLAT	Set Up CRM, Product Related, Industry, Industry-Specific Translates, Industry-Specific Translates	View or modify a list of translate values that are used in the industry applications.

## Setting Up Industry-Specific Pages

Access the Industry-Specific Page Setup page (Set Up CRM, Product Related, Industry, Industry Specific Page Setup, Industry Specific Page Setup).

### Industry Specific Page Setup

**Market** Fin Svcs **Base Menu** RB\_DEFINE\_PRODUCTS

**Base Menu Bar** USE **Base Item** PROD\_GROUP\_TBL

**Base Page** PROD\_GROUP\_TBL

**Page Setup**

<b>*Base Page</b> <input type="text" value="PROD_GROUP_TBL"/>	<b>Base Record</b> <input type="text" value="PROD_GROUP_TBL"/>
<b>*Menu Name</b> <input type="text" value="RBF_PRODUCTS"/>	<b>*Bar Name</b> <input type="text" value="USE"/>
<b>*Item Name</b> <input type="text" value="PROD_GROUP_TBL"/>	<b>Component Name</b> PROD_GROUP_TBL
<b>*Page Name</b> <input type="text" value="RBFPROD_GROUP_TBL"/>	<b>Page Item Name</b> RBFPROD_GROUP_TBL
<b>Record</b> <input type="text" value="PROD_GROUP_TBL"/>	<b>Component Interface Name</b> <input type="text" value="RBF_PROD_GROUP_CI"/>

Industry-Specific Page Setup page

Set by market, each page setup definition includes information, such as the base page, menu name, item name, page name, record, base record, bar name, component name, page item name, and component interface name of the specified component page. The system uses this page setup data to facilitate the communication between applications.

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**Note.** Do not modify the information delivered on the Industry-Specific Page Setup page unless you are customizing PeopleSoft CRM. Customizing requires you to update several values (such as the component interface name) on this page.

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## Setting Up Industry-Specific Translate Values

Access the Industry-Specific Translates page (Set Up CRM, Product Related, Industry, Industry-Specific Translates, Industry-Specific Translates).

### Industry-Specific Translates

**Field Name** FSI\_SERVICE\_TYPE **Length** 2

**Market** Fin Svcs

Industry-Specific Translates						Customize	Find	First	1-7 of 7	Last
*Field Value	*Effective Date	*Status	*Long Name	*Short Name						
BB	01/01/1900	Active	Business Banking	Bus Bank						
BK	01/01/1900	Active	Banking	Banking						
IN	01/01/1900	Active	Insurance	Insurance						
LO	01/01/1900	Active	Loan Service	Loan						
MG	01/01/1900	Active	Mortgage	Mortgage						
PB	01/01/1900	Active	Personal Banking	Pers Bank						
WM	01/01/1900	Active	Wealth Management	With Mgt						

Industry-Specific Translates page

Using industry-specific translate pages you can set up field values for industry use.

See *and PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Working with Business Units and TableSet Controls."

## Setting Up Insurance Industry Translate Values

This section discusses how to set up insurance industry translate values.

### Page Used to Set Up Insurance Industry Translate Values

Page Name	Definition Name	Navigation	Usage
Insurance Translate Values	RBI_XLAT_VALUE	Set Up CRM, Product Related, Financial Services, Insurance Translate Values, Insurance Translate Values	View and create translate values for insurance-related fields.

## Setting Up Insurance Industry Translate Values

Access the Insurance Translate Values page (Set Up CRM, Product Related, Financial Services, Insurance Translate Values, Insurance Translate Values).

### Insurance Translate Values

Field Name POLICY\_STATUS Length 18

*Effective Date	*Field Value	*Status	*Long Name	*Short Name		
01/01/1900 <small>31</small>	ISSUED	Active ▼	Policy is issued and available for cha	Issued	+ -	
01/01/1900 <small>31</small>	NOTQUOTEDNOT	Active ▼	Policy is not in force	not inforc	+ -	
01/01/1900 <small>31</small>	QUOTEDAWAITIN	Active ▼	Has been rated, quoted & is awaiting	Awaiting R	+ -	
01/01/1900 <small>31</small>	QUOTEDNOTBOU	Active ▼	Submission has been quoted, but is r	Submission	+ -	
01/01/1900 <small>31</small>	REX	Active ▼	Non-Renew	Non-Renew	+ -	
01/01/1900 <small>31</small>	XLC	Active ▼	Cancel	Cancel	+ -	

\* Required Field

Insurance Translate Values page

### Effective Date

Enter the date on which you want this value to take effect. The default is today's date. If you want the effective date to predate all rows on your database, enter 01011900 (January 1, 1900).

### Field Value

Enter the translate value for the field. The number of characters entered in this field cannot exceed the number specified in the Length field.

### Status

Select *Active*. When a value for a field becomes obsolete, select *Inactive* rather than deleting it. Deactivating a value enables fields in the database that still contain the value to use the correct long and short names. If you delete an obsolete code from the Translate table and you still have records in the database that contain that value, you must change all of those values to active values.

### Long Name

Enter up to 30 characters. Field values are sorted by their long names at run time and appear in the system in ascending order. For example, if the long names entered for the three field values are *Activated*, *Suspended*, and *Disconnected*, they appear in the corresponding drop-down list box in this order: *Activated*, *Disconnected*, and *Suspended*.

### Short Name

Enter up to 10 characters.

**See Also**

*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Working with Business Units and TableSet Controls," Defining Business Units and TableSet Controls

---

## Setting Up Online Application Forms for FNOL

You can build web application forms for FNOL using form templates and configure them to meet your business needs.

This section discusses how to set up online application forms.

### Pages Used to Set Up Online Application Forms

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Application Form	RBF_APPFORM_SETUP	Set Up CRM, Common Definitions, Process Automation, Application Form, Application Form	Set up online application forms.
Page Toolbar Detail	RBF_APPFORM_SETUP	Select the Page Toolbar Detail tab on the Application Form page.	Configure the toolbar.
Page Event Detail	RBF_APPFORM_SETUP	Select the Page Event Detail tab on the Application Form page	Trigger events when the application pages load and unload.
Audit Detail	RBF_APPFORM_SETUP	Select the Audit Detail tab on the Application Form page	View a history of application form changes.
Related Products	RBF_APPFORM_PROD	Set Up CRM, Common Definitions, Process Automation, Application Form, Application Form, Related Products	Displays all products using the application form.

### Setting Up Online Application Forms

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

Application Form
Related Products

**\*SetID**

**Form Title**

**Description**

**Application Form Templates** Find | View All | First 1 of 1 Last

**Effective Date**

**\*Menu Name**

**\*Item Name**

**Form Load Event**

**Node Name**

**\*Menu Bar Name**

**Page Name**

**Form Submit Event**

**Page Navigation Setup Information** Customize | Find | View All | First 1-5 of 5 Last

Page Navigation Detail

Page Toolbar Detail

Navigation Page	*Sequence	*Page Name	*Page Title		
<input checked="" type="checkbox"/>	10	RBF_COMM_APPLICANT	About You	+	-
<input type="checkbox"/>	12	RBF_COMM_COAPPL	About Your Co-Applicant	+	-
<input type="checkbox"/>	13	RBF_COMM_COM	About Your Company	+	-
<input checked="" type="checkbox"/>	20	RBF_COMM_CONTACT	Contact Information	+	-
<input checked="" type="checkbox"/>	30	RBF_EMPLOY	Employment Information	+	-

**Modified** 01/07/2002 4:47AM PST FSISYSTEM

[Test Application Form](#)

**Non-Data Derived Records Information** Customize | Find | View All | First 1 of 1 Last

Non-Data Derived Records

Audit Detail

Derived Record Name	Record Description		
<input type="text"/>		+	-

**Modified** 01/25/2002 5:25PM PST FSISYSTEM

Application Form page

**SetID** Select the setID that will have access to the application form.

**Form Title** Enter the application title to be used when the application form is processed.

**Description** Enter the application form usage and any specifications.

Use the fields in the Application Form Templates group box to set up the template that you will use for the application form.

**Effective Date** Displays the application form effective date.

<b>Node Name</b>	Select the node in which the application form is processed. This functionality is not supported for this release.
<b>Menu Name</b>	Specify the menu where the application form component is added.
<b>Menu Bar Name</b>	Specify the menu bar name where the application form component is added.
<b>Item Name</b>	Specify the item name where the application form component is added.
<b>Page Name</b>	Specify the first page to appear when the application form is processed.
<b>Form Load Event</b>	Specify the action set to be triggered when the application form is processed. For example, this could be a function call to pre-fill information.
<b>Form Submit Event</b>	Specify the action set to be triggered when the Submit button is clicked.

Use the fields in the Page Navigation Setup Information group box to set up the navigation within the application.

<b>Navigation Page</b>	Select or clear to specify if this page is navigable or not.
<b>Sequence</b>	Enter the order of the navigable pages.
<b>Page Name</b>	Specify the page to appear.
<b>Page Title</b>	Enter the title to appear when the page is loaded.
<b>Test Application Form</b>	Click to preview the form.

Use the fields in the Non-Data Derived Records Information group box to specify records, such as links that the system will not process.

<b>Derived Record Name</b>	Specify any records that are not used as data records—that is, any records that the system will not process. This information results in performance improvement.
----------------------------	---

### ***Page Toolbar Detail***

Select the Application Form page: Page Toolbar Detail tab (select the Page Toolbar Detail tab on the Application Form page).

Toolbar Item	Sequence	Page Name	Toolbar Item Label		
<input checked="" type="checkbox"/>	10	RBF_COMM_APPLICANT	Personal	+...	-
<input type="checkbox"/>	12	RBF_COMM_COAPPL		+...	-
<input type="checkbox"/>	13	RBF_COMM_COM		+...	-
<input checked="" type="checkbox"/>	20	RBF_COMM_CONTACT	Contact	+...	-
<input checked="" type="checkbox"/>	30	RBF_EMPLOY	Employment	+...	-

Modified 01/07/2002 4:47AM PST FSISYSTEM Test Application Form

Application Form page: Page Toolbar Detail tab

**Toolbar Item** Select the check box, if the page is accessible from the toolbar.

**Toolbar Item Label** Enter the toolbar title that appears as the link's tooltip for the page. When the user moves the mouse on the link, the name appears. When the user clicks the link, the system loads the related page.

**Page Event Detail**

Select the Application Form page: Page Event Detail tab (select the Page Event Detail tab on the Application Form page).

Sequence	Page Name	*Page Load Event	*Page Exit Event		
10	RBF_COMM_APPLICANT			+...	-
12	RBF_COMM_COAPPL			+...	-
13	RBF_COMM_COM			+...	-
20	RBF_COMM_CONTACT	Dialing problem solution		+...	-
30	RBF_EMPLOY			+...	-

Modified 01/07/2002 4:47AM PST FSISYSTEM Test Application Form

Application Form page: Page Event Detail tab

**Page Load Event** Specify the action set that is triggered when the page is loaded and before the page appears. For example, you might transfer data from one page to another.

**Page Exit Event** Specify the action set that is triggered before the page is unloaded. For example, you might validate data on the current page before moving to the next page.

## Viewing Related Products

Access the Related Products page (Set Up CRM, Common Definitions, Process Automation, Application Form, Application Form, Related Products).

Application Form		Related Products	
<b>SetID</b>	FSI01	<b>Form Title</b>	Generic Online Application
Related Products		Customize   Find   View All     First  1-7 of 7  Last	
Description	Channel		
 Auto Loan	All Channels		
 Premium Package	All Channels		
 Premium Savings Account	All Channels		
 529 College Savings Plan	All Channels		
 Retirement Planning	All Channels		
 College Savings Planning	All Channels		
 Estate Planning	All Channels		
<b>Modified</b>	01/25/2002 5:25PM PST	FSISYSTEM	

Related Products page

View a list of all products using the application form.

### See Also

[Chapter 18, "Working with Self Service Transactions for Insurance," Reporting an FNOL, page 195](#)

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## Setting Up Configuration Tables for Energy and Communications

When setting up the Configuration table for communications, consider:

- The Communications Configuration table establishes configuration parameters for your system.
- The Configuration table is delivered with default values and is maintained by PeopleSoft.
- The Configuration table is based on setID.

When setting up the Configuration table for energy, RBT\_CONFIG\_TBL, consider the following:

- The Energy Configuration table establishes configuration parameters.
- The Configuration table is delivered with default values and is maintained by PeopleSoft.
- The Configuration table is based on setID.

**See Also**

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Understanding Configuration Tools"*

## Pages Used to Set Up the Configuration Table for Energy or Communications

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Communications Setup	RBT_CONFIG_PG	Set Up CRM, Product Related, Communications, Communications Setup, Communications Setup	Set up the configuration parameters for the communications industry.
Energy Setup	RBT_CONFIG_PG	Set Up CRM, Product Related, Energy, Energy Setup, Energy Setup	Set up the configuration parameters for the energy industry.

## Setting Up the Communications or Energy Configuration Table

Access the Communications (or Energy) Setup page (Set Up CRM, Product Related, Communications, Communications Setup, Communications Setup or Set Up CRM, Product Related, Energy, Energy Setup, Energy Setup).

### Communications Setup

SetID COM01

Configuration			
*Name	*Value	Description	
AGETIMEBUS	90	Number Aging time for Bus Cust	+
AGETIMEIND	180	Number Aging time for Ind Cust	+
BILLSYSTEM	PORTAL	Billing System for Telco	+
FFMSYSTEM	PSFT	Fulfillment System	+
FRAUDBU	FRAUD	Business Unit for Fraud	+
FRAUDPG	FRAUD	Fraud Provider Group	+
INTEGRATBILL	ON	Billing Integration ON/OFF	+
MAXNUMLISTVAL	25	Max Numbers to show in assign	+

Copy Configuration to New SetID

Communications Setup page

---

**Note.** The setup page for energy is similar to the communications page.

---

**Copy Configuration to New SetID** Create an identical setup for a new setID.

**See Also**

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Understanding Configuration Tools"*

---

## Setting Up Communications Industry-Specific Tables

This section provides an overview of call center and order capture business unit setup for communications and discusses how to:

- Set up call center business units.
- Set up Order Capture business units.

## Understanding Call Center Business Unit Setup for Communications

When setting up business units and setIDs for communications, consider that the minimum requirement for your setup is one setID with two business units, if you use fraud. If you do not use the fraud functionality, then one business unit is adequate.

The communications solution has a fraud business project that is instantiated when a case with the type of Fraud is submitted. This functionality relies on call center applications events for business projects, which are delivered as disabled. To enable the Fraud business project, call center events must be enabled.

### **Setting Up Case Creation for Self-Service Users**

This setup is necessary to enable self-service users to create cases successfully:

1. Define a call center business unit, options, and the case defaults for the Self Service Case components.

The business unit is used by both internal and external users.

2. Define user preferences for the self-service user.

Make sure the self-service user belongs to the communications market and has a default business unit and setID.

3. Associate the person with the user profile.

Users that are created by using the self-service registration functionality inherit the setup as described in steps 2 and 3 automatically, provided that the correct guest user is used for the purpose. As seed data, PeopleSoft provides the guest user with operator ID *GUESTCOMM* for this purpose. Users that are created by the guest user *GUESTCOMM* have the PeopleTools role of *CSP Self-Service*, which enables them to perform self-service transactions.

### **See Also**

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

*PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Configuring Self-Service Applications," Understanding PeopleSoft Call Center's Self-Service Application Configuration

## Understanding Order Capture for Communications

When you prepare Order Capture for communications, consider:

- The *RO\_COM* application class initiates the codes.
- Select *Use Accounts* to ensure that the entire Communication Order Capture component is visible.
- The *COM\_PRICE* price list ID sets up the ability to have recurring costs.

This automatically links each new customer with a price list.

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

## Pages Used to Set Up Communications Industry-Specific Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Call Center BU	BUS_UNIT_RC1	Set Up CRM, Business Unit Related, Call Center Definition, Call Center BU	Set up business units that are specific to the communications call center.
Order Capture Definition	BUS_UNIT_RO1	Set Up CRM, Business Unit Related, Order Capture Definition, Order Capture Definition	Set up Order Capture business units for communications.

## Chapter 5

# Setting Up Business Objects

This chapter provides an overview of the business objects used in industry-specific applications and discusses how to:

- Set up companies.
- Set up partnerships and alternate capacities.
- Set up households.

---

## Understanding Business Objects

This section lists prerequisites and discusses:

- Core application business objects.
- Business objects in PeopleSoft industry-specific applications.
- Roles and relationships.

## Core Application Business Objects

PeopleSoft delivers these core application business objects:

- Company
- Person
- Consumer
- Contact
- Site

For complete details about the setup and management of core application business objects, refer to *PeopleSoft CRM 9.1 Business Object Management PeopleBook*.

See *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Business Object Management Basics." and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Data Management for Organization Business Objects." and *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Data Management for Individual Business Objects."

## Business Objects for Industry-Specific Applications

This section discusses the business objects used by PeopleSoft industry-specific applications.

### **Company**

A *Company* is an organization that does business with your organization. The company may or may not have been sold a product by your organization. Companies are represented by a business object type of *Organization* and a role type of *Company*.

If a company is set up for the financial services industries, you can store additional information on financial accounts related to the company.

### **Partnership**

A *Partnership* is a type of unincorporated business organization composed of multiple individuals called general partners. A partnership does business with your organization and may or may not have been sold a product. Partnerships are represented by a business object type of *Organization* and a role type of *Partnership*. The role type ID is 30.

A record for each partnership that you do business with is created in the Partnership table (RBF\_PARTSHP). Because partnerships participate in business transactions, a record for the partnership is also created in the Business Contact table (BC), which enables records to be defined for the partnership.

---

**Note.** Partnership is designed specifically for financial service industries, such as banking or insurance. The partnership business object is not the same as the partner functionality that is available when you licence PeopleSoft Partner Relationship Management.

---

See *and PeopleSoft Partner Relationship Management 9.1 PeopleBook*, "Understanding PeopleSoft Partner Relationship Management."

### **Alternate Capacity**

An *alternate capacity* is any type of non-legal entity, such as an association or company baseball team. An alternate capacity does business with your organization and may or may not have been sold a product. Alternate capacities are represented by a business object type of *Organization* and a role type of *Alternate Capacity*. The role type ID is 31.

A record for each alternate capacity that you do business with is created in the Alternate Capacity table (RBF\_ALT\_CAP). Because alternate capacities participate in business transactions, a record for the alternate capacity is also created in the Business Contact table (BC), which enables records to be defined for the alternate capacity.

---

**Note.** Alternate Capacity is designed specifically for financial service industries, such as banking or insurance.

---

## Household

A Household is an association of related persons (consumers). Every client is an individual person (consumer) in the system. Household is a relationship category. Household relationships are established in the Relationship tab of the Client component. A household is an organization business object which extends the Organization class of the revised Business Object Relationship Model and Customer Data Model Application Class Hierarchy. Households are represented by a business object type of *Organization* and a role type of *Household*. The role type ID is 68.

---

**Note.** Household is designed specifically for Wealth Management functionality.

---

See *PeopleSoft Client Management 9.1 PeopleBook*, "Working with Wealth Management," Understanding Household Relationships.

## Roles and Relationships

This section discusses roles and relationships in PeopleSoft industry-specific applications.

- *Roles* define the customer's relationship to your company.

For example, a customer may be an account owner, a beneficiary, an agent, or a broker. One customer may have multiple roles. An account owner might be the beneficiary on another policy.

- *Relationships* further define the customer.

Relationships can define how one customer is related to another. For example, you may want to define how a beneficiary is related to the insured. Relationships also define how customers are related to financial accounts. A customer may be the owner of an account or the beneficiary of an account.

You can add roles and relationships to meet your business needs.

### See Also

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Control Values for Business Objects," Defining Role Types and Role Categories

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Control Values for Business Objects," Defining Relationship Types and Relationship Categories

---

## Prerequisites

The industry-specific customer data model is based on core PeopleSoft CRM functionality. It is highly recommended that you review the following documentation before implementing the customer data model:

<b>Process</b>	<b>Details</b>	<b>More Information</b>
Understanding business object management	<ul style="list-style-type: none"> <li>• Business object relationship model components.</li> <li>• Integration with other systems.</li> <li>• Control values.</li> <li>• Relationship viewer.</li> <li>• Business object directory searches.</li> <li>• Quick Create.</li> </ul>	See <i>and PeopleSoft CRM 9.1 Business Object Management PeopleBook</i> , "Understanding Business Object Relationship Model Components."
Setting up core business objects	<ul style="list-style-type: none"> <li>• Company.</li> <li>• Person</li> <li>• Consumer.</li> <li>• Contact.</li> <li>• Site.</li> <li>• Ad hoc business objects.</li> </ul>	See <i>and PeopleSoft CRM 9.1 Business Object Management PeopleBook</i> , "Understanding Business Object Relationship Model Components." and <i>PeopleSoft CRM 9.1 Business Object Management PeopleBook</i> , "Defining Control Values for Business Objects." and <i>PeopleSoft CRM 9.1 Business Object Management PeopleBook</i> , "Defining Site Business Objects." and <i>PeopleSoft CRM 9.1 Business Object Management PeopleBook</i> , "Defining Ad Hoc Business Objects."
Setting up details for business objects	<ul style="list-style-type: none"> <li>• Name information.</li> <li>• Contact information.</li> </ul>	See <i>and PeopleSoft CRM 9.1 Business Object Management PeopleBook</i> , "Defining Name and Address Information for Business Objects." and <i>PeopleSoft CRM 9.1 Business Object Management PeopleBook</i> , "Defining Control Values for Business Objects," <i>Setting Up Contact Methods.</i> and <i>PeopleSoft CRM 9.1 Business Object Management PeopleBook</i> , "Defining Company Business Objects," <i>Defining Company Contacts.</i>

---

## Setting Up Companies

This section discusses how to:

- Define company general information.
- View and maintain contracts.
- View company financial accounts.

## Pages Used to Set Up Companies

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Company - Summary	RDF_COMPANY_MAIN_2	Customers CRM, Search Company, Company, Summary  Customers CRM, Add Company, Company, Summary	View and define primary information about the company.
Company - Contracts	RDFCOMPANY_ACNT	Customers CRM, Search Company, Company, Contracts  Customers CRM, Add Company, Company, Summary	View and maintain contracts associated with the company.
Company - Financial Accounts	RDFCOMPANY_ACCT	Customers CRM, Search Company, Company, Financial Accounts  Customers CRM, Add Company, Company, Summary	View financial accounts associated with the company.

## Viewing Summary Company Information

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

**Company**

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

**Customer** Jordan Enterprises      **Location** New York, NY, USA  
**Contact** Kevin Jordan              **Job Title**  
**Phone** 555 555 1213                  **Email** kevinrepresentative@kevinrepresentative.net

Summary | Account Team | Tasks | Call Reports | Financial Accounts | Billing Accounts | Contracts | D

Summary | Details | Purchasing Info | Tax Exempt Certificate

Company Info	Primary Contact
<b>Company Name</b> Jordan Enterprises <b>Address</b> 150 East 58th Street, New York, NY, 10155, USA <b>Phone</b> 555 5551200 <b>Fax</b> <b>Email</b> <b>Web URL</b> http://www.peoplesoft.com <a href="#">Details</a>	<b>Name</b> Kevin Jordan <b>Title</b> <b>Address</b> 145 1st Street, East Rutherford, NJ, 45678, USA <b>Phone</b> 555 555 1213 <b>Fax</b> <b>Email</b> kevinrepresentative@kevinrepresentative.net <a href="#">Details</a>

Company - Details page (1 of 2)

Overview

<b>Customer Type</b>	<b>Taxpayer ID</b> 0987123345
<b>Business</b>	<b>Equity Symbol</b>
<b>Industry</b>	<b>Legal Structure</b>
<b>Country</b>	<b>Employee Total</b>
<b>Location Type</b>	<b>Parent Company</b>
<b>Year Started</b>	<b>Year Incorporated</b>
<b>SetID</b> FSI01	<b>Company ID</b> 200004
<b>Partner</b> No <a href="#">Add Partner Data</a>	<a href="#">Corporate Hierarchy</a>
<a href="#">Details</a>	

Status

<b>Customer Status</b> Active	<b>Status Date</b> 11/08/2001
<b>Customer Since</b> 11/08/2001	<b>Segment Code</b> Medium

Financial Summary

<b>Fiscal Year End</b>	<b>Equity Symbol</b>
<b>Currency Code</b>	<b>Exchange</b>
<b>Revenue</b>	<b>Market Cap</b>
<b>Net Income</b>	<b>Stock Price</b>
<b>Credit Rating</b>	<b>Quote Date</b>
<a href="#">Details</a>	

Company - Details page (2 of 2)

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Business Object Management PeopleBook*.

See *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Company Business Objects."

## Maintaining General Company Information

Access the Company - Details page (click the Details link on the Company page).

### Company

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

**Customer** Jordan Enterprises      **Location** New York, NY, USA  
**Contact** Kevin Jordan      **Job Title**  
**Phone** 555 555 1213      **Email** kevinrepresentative@kevinrepresentative.net

Summary | Account Team | Tasks | Call Reports | Financial Accounts | Billing Accounts | Contracts | ▶

Summary | Details | Purchasing Info | Tax Exempt Certificate

#### Company Details

<b>*Company</b> Jordan Enterprises <a href="#">More Names</a>	<b>Taxpayer ID</b> 0987123345
<b>Country</b> <input type="text"/>	<b>Location Type</b> <input type="text"/>
<b>Incorporated In</b> <input type="text"/>	<b>Employee Total</b> <input type="text"/>
<b>DUNS Number</b> <input type="text"/>	<b>Parent Company</b> <input type="text"/>
<b>Ownership</b> <input type="text"/>	<b>Year Started</b> <input type="text"/>
<b>Legal Structure</b> <input type="text"/>	<b>Year Incorporated</b> <input type="text"/>
<b>Customer Type</b> <input type="text"/>	<b>*SetID</b> FSI01
<b>Business</b> <input type="text"/>	<b>*Company ID</b> 200004
<b>Website URL</b> <input type="text"/> <a href="#">http://www.peoplesoft.com</a> <small>(example: http://www.peoplesoft.com)</small>	<b>Privacy</b> <input type="checkbox"/> Do Not Contact <input type="checkbox"/> Do Not Email <input type="checkbox"/> Do Not Call <input type="checkbox"/> Do Not Mail
<input type="checkbox"/> <b>Minority Owned</b>	
<b>Partner</b> No <a href="#">Add Partner Data</a>	
<a href="#">Corporate Hierarchy</a>	

Company - Details page (1 of 3)

**Contact Info Entries**

**\*Description**  [More...](#)

**Phone**

*Type	Country Code	Number	Ext./PIN
Business		555 5551200	
Cellular			
FAX			
Pager			

**Email**

*Type	Email Address
Business	
Other	

**Address**

[Look up Address](#)

**\*Type**

**\*Country**

**Address 1**

**Address 2**

**Address 3**

**City**

**County**

**State**

**Postal**

[Set Display](#)

**Status and Currency Data**

**\*Customer Status**

**Status Date**

**Customer Since**

**Segment Code**

**Registration**

**Credit Score**

**Estimated Value**

**Spoken Language**

**Verified By**

**Secret Password**

**\*Currency Code**

**\*Currency Type**

**Credit Rating Value**

**Assessment**

**Type**

**Credit Score Date**

**Risk Grade**

**Do Not Share Information**

**Verified Date**

**VAT Type**

Company - Details page (2 of 3)

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Financial Details	
Fiscal Year End: <input type="text"/>	Statement Date <input type="text"/>
Currency <input type="text"/>	Statement Ind <input type="text"/>
Revenue Code <input type="text"/>	Auditor <input type="text"/>
Annual Revenue <input type="text"/>	Audit Indicator <input type="text"/>
Net Income <input type="text"/>	Exchange <input type="text"/>
Total Assets <input type="text"/>	Equity Symbol <input type="text"/>
Total Liabilities <input type="text"/>	Market Cap <input type="text"/>
Acct Receivable <input type="text"/>	Stock Price <input type="text"/>
Acct Payable <input type="text"/>	Quote Date <input type="text"/>
Net Worth <input type="text"/>	Credit Rating <input type="text"/>
Industry Classifications	
Primary Industry <input type="text"/>	Secondary Industry <input type="text"/>
SIC Type <input type="text"/>	SIC Code <input type="text"/>
Other Industry Classifications	
No industry classifications have been added	
<input type="button" value="Add Industry Classification"/>	
Purchasing Options	
<input checked="" type="checkbox"/> Sold To Customer	This company can make purchases.
<input checked="" type="checkbox"/> Bill To Customer	This company can receive bills.
<input checked="" type="checkbox"/> Ship To Customer	This company can receive shipments.

Company - Details page (3 of 3)

Explanations of these fields are provided in the *PeopleSoft CRM 9.1 Business Object Management PeopleBook*.

See *PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Company Business Objects," Defining Company Information.

## Viewing Company Financial Accounts

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

**Company**

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

**Customer** Jordan Enterprises  
**Contact** Kevin Jordan  
**Phone** 555 555 1213

**Location** New York, NY, USA  
**Job Title**  
**Email** kevinrepresentative@kevinrepresentative.net

Summary | Account Team | Tasks | Call Reports | **Financial Accounts** | Billing Accounts | Contracts

**Financial Accounts** Customize | Find | First 1-3 of 3 Last

	Account Number	Account Type	Nickname	Status
	50015	Credit	SMALL BUSINESS LOAN	Open
	50019	Checking	JORDAN ENTERPRISES	Open
	50021	Checking	BUSINESS ACCOUNT	Open

Company - Financial Accounts page

The system displays the accounts or policies associated with the company. Click the transfer button in the account row to view and update the account record.

### See Also

[Chapter 16, "Working with Financial Accounts," page 165](#)

---

## Setting Up and Maintaining Partnerships and Alternate Capacities

This section provides an overview of the set up and maintenance of partnerships and alternate capacities and discusses: the setup for partnerships and alternate capacities.

- Viewing and maintaining general information
- Viewing financial accounts
- Viewing contracts
- Viewing and maintaining notes
- Viewing and maintaining contacts
- Maintaining relationships

## Understanding Set Up and Maintenance for Partnerships and Alternate Capacities

The set up and maintenance pages for partnerships and alternate capacities are essentially the same. In this section, any differences are noted in the field descriptions. All pages displayed are from the partnership component.

## Pages Used to Set Up and Maintain Partnerships and Alternate Capacities

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Partnership	RBF_PARTSHP_2	Customers CRM, Search Partnership, Partnership	View and maintain name, profile, and contact information for a partnership.
Partnership - Financial Accounts	RBF_PARTSHP_ACCT	Customers CRM, Search Partnership, Partnership, Financial Accounts	View financial accounts associated with the partnership.
Partnership - Contracts	RBF_PARTSHP_ACNT	Customers CRM, Search Partnership, Partnership, Contracts	View contracts associated with the partnership.
Partnership - Notes	RBF_PARTSHP_NOTE_2	Customers CRM, Search Partnership, Partnership, Notes	View and maintain notes and attachments associated with the partnership. This page uses core PeopleSoft CRM functionality.
Partnership - Contact Info	RBF_PRTSHP_CNTCT_2	Customers CRM, Search Partnership, Partnership, Contacts	View and maintain contacts associated with the partnership. This page uses core PeopleSoft CRM functionality.
Partnership - Relationships	RBF_PARTSHP_REL	Customers CRM, Search Partnership, Partnership, Relationships	View and maintain relationships associated with the partnership. This page uses core PeopleSoft CRM functionality.
Alternate Capacity	RBF_ALTCAP_MAIN_2	Customers CRM, Search Alternate Capacity, Alternate Capacity	View and maintain name, profile, and contact information for an alternate capacity.
Alternate Capacity - Financial Accounts	RBF_ALTCAP_ACCT	Customers CRM, Search Alternate Capacity, Alternate Capacity, Financial Accounts	View and maintain financial accounts associated with the alternate capacity.
Alternate Capacity - Contracts	RBF_ALTCAP_ACNT	Customers CRM, Search Alternate Capacity, Alternate Capacity, Contracts	View and maintain contracts associated with the alternate capacity.

Page Name	Definition Name	Navigation	Usage
Alternate Capacity - Notes	RBF_ALTCAP_NOTE_2	Customers CRM, Search Alternate Capacity, Alternate Capacity, Notes	View and maintain notes and attachments associated with the alternate capacity. This page uses core PeopleSoft CRM functionality.
Alternate Capacity - Contact Info	RBF_ALTCAP_CNTCT_2	Customers CRM, Search Alternate Capacity, Alternate Capacity, Contact Info	View and maintain contacts associated with the alternate capacity. This page uses core PeopleSoft CRM functionality.
Alternate Capacity - Relationships	RBF_ALTCAP_REL	Customers CRM, Search Alternate Capacity, Alternate Capacity, Relationships	View and maintain relationships associated with the alternate capacity. This page uses core PeopleSoft CRM functionality.

## Viewing and Maintaining General Information

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

Partnership

Save | Search | Add Partnership | Add to My Contacts | Personalize

**Name** Lopez and Lee LLP **Partnership ID** 200001

Partnership | Financial Accounts | Contracts | Notes | Contact Info | Relationships

Primary | Name

**Profile Information**

<p><b>*TIN Type</b> <input type="text" value="Federal Employer ID"/></p> <p><b>Legal Form</b> <input type="text"/></p> <p><b>Business</b> <input type="text"/></p> <p><b>Revenue</b> <input type="text"/></p> <p><b>Employee Total</b> <input type="text"/></p> <p><b>Website URL</b> <input type="text"/></p> <p><b>Industry ID</b> <input type="text"/></p>	<p><b>*Tax ID</b> <input type="text" value="102003000"/></p> <p><b>Chamber of Commerce</b> <input type="text" value="000000000000000000"/></p> <p><b>Revenue Generated</b> <input type="text"/></p> <p><b>Equity Symbol</b> <input type="text"/></p> <p><b>*SetID</b> <input type="text" value="FSI01"/></p> <p><b>Location Type</b> <input type="text"/></p> <p><b>Privacy</b></p> <p><input type="checkbox"/> Do Not Contact</p> <p><input type="checkbox"/> Do Not Email</p> <p><input type="checkbox"/> Do Not Call</p> <p><input type="checkbox"/> Do Not Mail</p>
---	---

Partnership page (1 of 2)

**Status and Currency Data**

<p><b>*Customer Status</b> <input type="text" value="Active"/></p> <p><b>Status Date</b> 11/08/2001</p> <p><b>Customer Since</b> 11/08/2001</p> <p><b>Segment Code</b> <input type="text" value="MED"/></p>	<p><b>*Currency</b> <input type="text" value="USD"/></p> <p><b>*Currency Type</b> <input type="text" value="CRRNT"/></p> <p><b>Credit Rating Value</b> <input type="text"/></p> <p><b>Assessment</b> Gold ★★★★★</p>
---	---

---

<p><b>Status Registration</b> <input type="text" value="Prospect"/></p> <p><b>Credit Score</b> <input type="text"/></p> <p><b>Estimated Life Value</b> <input type="text"/></p> <p><b>Spoken Language</b> <input type="text"/></p> <p><b>Verified By</b> <input type="text"/></p> <p><b>Secret Password</b> <input type="text"/></p>	<p><b>Type</b> Partnership</p> <p><b>Credit Score Date</b> <input type="text"/></p> <p><b>Risk Grade</b> <input type="text"/></p> <p><input checked="" type="checkbox"/> <b>Do Not Share Information</b></p> <p><b>Verified Date</b> <input type="text"/></p> <p><b>VAT Type</b> <input type="text"/></p>
--	---

**Contact Info Entries**

**\*Description**  [More...](#)

Phone	Address																				
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>*Type</th> <th>Country Code</th> <th>Number</th> <th>Ext/PIN</th> </tr> </thead> <tbody> <tr> <td><input type="text" value="Business"/></td> <td><input type="text"/></td> <td>555 5551217</td> <td><input type="text"/></td> </tr> <tr> <td><input type="text" value="Cellular"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="text" value="FAX"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="text" value="Pager"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table>	*Type	Country Code	Number	Ext/PIN	<input type="text" value="Business"/>	<input type="text"/>	555 5551217	<input type="text"/>	<input type="text" value="Cellular"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="FAX"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Pager"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<div style="border: 1px solid #ccc; padding: 5px;"> <p><a href="#">Look up Address</a></p> <p><b>*Type</b> <input type="text" value="Business"/></p> <p><b>*Country</b> <input type="text" value="United States"/></p> <p><b>Address 1</b> <input type="text" value="4910 Kea Lane"/></p> <p><b>Address 2</b> <input type="text"/></p> <p><b>Address 3</b> <input type="text"/></p> <p><b>City</b> <input type="text" value="Oakland"/></p> <p><b>County</b> <input type="text"/></p> <p><b>State</b> <input type="text" value="CA"/> <input type="text" value="California"/></p> <p><b>Postal</b> <input type="text" value="92040"/></p> </div>
*Type	Country Code	Number	Ext/PIN																		
<input type="text" value="Business"/>	<input type="text"/>	555 5551217	<input type="text"/>																		
<input type="text" value="Cellular"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																		
<input type="text" value="FAX"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																		
<input type="text" value="Pager"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																		
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<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>*Type</th> <th>Email Address</th> </tr> </thead> <tbody> <tr> <td><input type="text" value="Business"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="text" value="Other"/></td> <td><input type="text"/></td> </tr> </tbody> </table>	*Type	Email Address	<input type="text" value="Business"/>	<input type="text"/>	<input type="text" value="Other"/>	<input type="text"/>															
*Type	Email Address																				
<input type="text" value="Business"/>	<input type="text"/>																				
<input type="text" value="Other"/>	<input type="text"/>																				

[Set Display](#)

Partnership page (2 of 2)

**Profile Information**

Use this page region to enter descriptive information about the partnership.

**TIN Type** (taxpayer identification number type)      Select the taxpayer identification number type.

**Taxpayer Identification Number**      Enter the taxpayer identification number.

**Legal Form**      Enter the legal form of the partnership.

**Business**(Partnership only)      Define the partnership's business type for informational purposes.

**Chamber of Commerce**      Enter the Chamber of Commerce membership number.

<b>Revenue</b> (Partnership only)	Enter the annual revenue of the partnership.
<b>Revenue Generated</b> (Partnership only)	Enter the revenue generated by the partnership.
<b>Employee Total</b> (Partnership only)	Enter the total number of employees for the partnership.
<b>Equity Symbol</b> (Partnership only)	Enter the stock symbol for the partnership.
<b>Website URL</b> (Partnership only)	Enter the URL of the partnership's website. Click the Website URL link to access the website that you entered in this field.
<b>SetID</b>	Select the appropriate SetID for the partnership.
<b>Industry ID</b> (Partnership only)	Enter the identification code of the industry that the partnership is a member of.
<b>Location Type</b> (Partnership only)	Select a location type for the partnership. Possible values are <i>Branch</i> , <i>Division</i> , <i>Headquarters</i> , <i>Single Location</i> , and <i>Subsidiary</i> . This field is informational only.
<b>Privacy</b>	Click Do Not Contact, Do Not Email, Do Not Call, or Do Not Mail to indicate any contact restrictions.

### ***Status and Currency Data***

<b>Customer Status</b>	Displays the status of the partnership record. Values are: <i>Active</i> or <i>Inactive</i> . The default value is <i>Active</i> .
<b>Currency</b>	Displays the currency code used for a monetary transaction with the partnership.
<b>Status Date</b>	Displays the date on which the current status value was specified.
<b>Currency Type</b>	Displays the exchange rate used to calculate monetary transaction amounts in alternate currencies.
<b>Customer Since</b>	Displays the date on which the partnership became a customer for your business.
<b>Credit Rating Value</b>	Displays the credit rating assigned to the partnership.
<b>Segment Code</b>	Displays the partnership's business segment for marketing purposes.
<b>Assessment</b>	Displays a graphical representation of the partnership rating.
<b>Status Registration</b>	Displays the status of the partnership's registration.

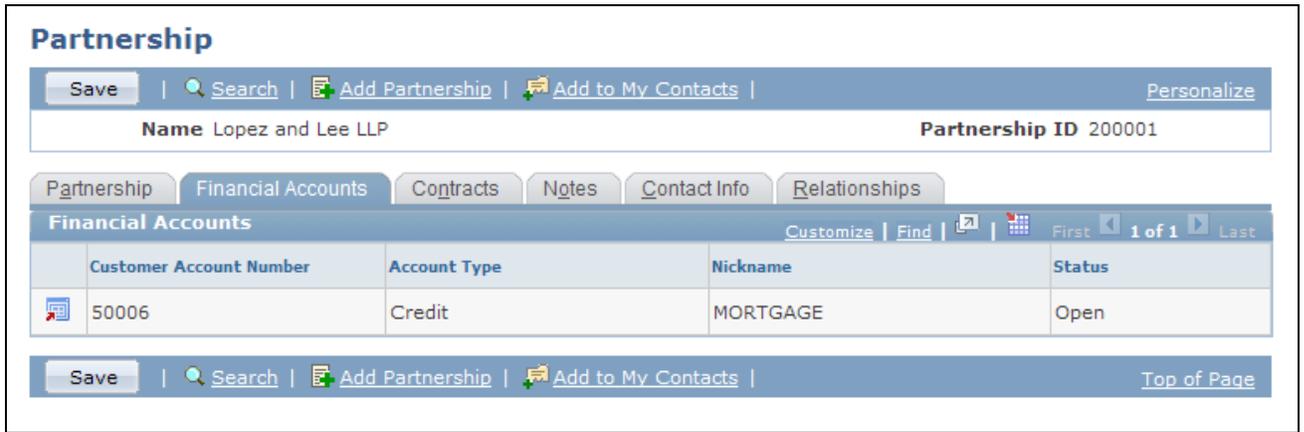
<b>Type</b>	Displays the type of business contact. Values are: <i>Person</i> , <i>Company</i> , <i>Partnership</i> , <i>Contact</i> , or <i>Alternate Capacity</i> .
<b>Credit Score</b>	Displays the partnership's credit score.
<b>Credit Score Date</b>	Displays the date on which the partnership's credit score was determined.
<b>Estimated Life Value</b>	Displays the total value of the partnership based on value in all accounts.
<b>Risk Grade</b>	Displays the risk to which the partnership exposes the financial services institution.
<b>Spoken Language</b>	Displays the language in which the partnership wants to interact.
<b>Do Not Share Information</b>	Select if business contact information cannot be shared with any other department or telemarketers.
<b>Verified By</b>	Displays the financial services employee who verified the partnership's identification.
<b>Verified Date</b>	Displays the date on which the partnership identification took place.
<b>Secret Password</b>	Enter the password provided by the partnership to confirm identity.
<b>VAT Type</b>	Enter the VAT type if applicable.

### **Contact Info (Information) Entries**

The Contact Info region enables you to view and update address, email, and phone contact information. Partnerships and alternate capacities have two default contact information entries with the descriptions: *Business* and *Other*. You can change the entry description when you enter contact information.

## **Viewing Financial Accounts**

Access the Partnership - Financial Accounts page (Customers CRM, Search Partnership, Partnership, Financial Accounts).



Partnership - Financial Accounts page

The page displays all financial accounts associated with the partnership.

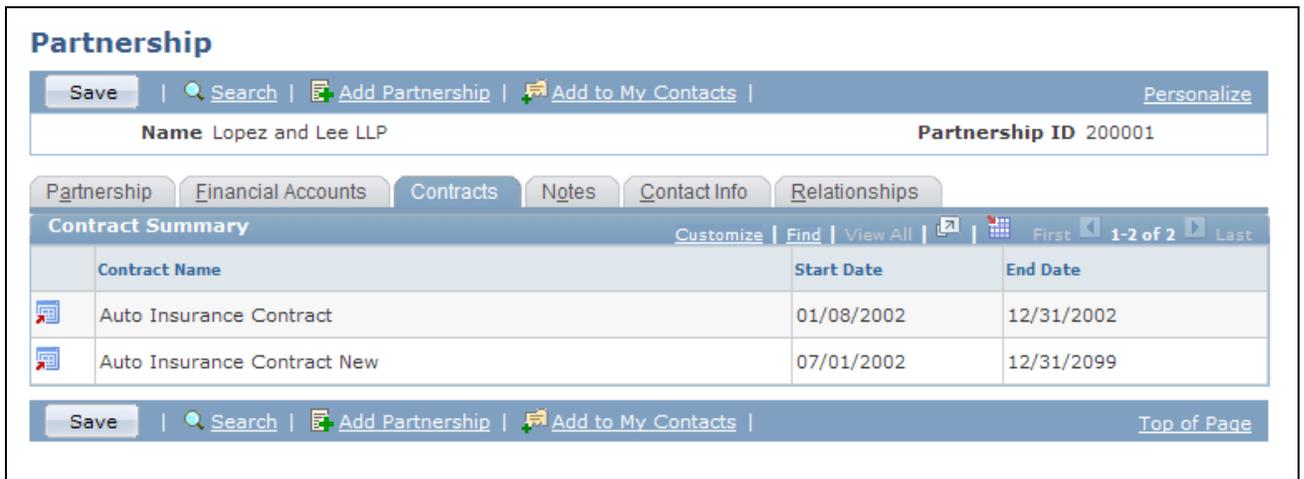
## Viewing and Maintaining Contacts

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

See *and PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Company Business Objects," Defining Company Contacts.

## Viewing Contracts

Access the Partnership - Contracts page (Customers CRM, Search Partnership, Partnership, Contracts).



Partnership - Contracts page

The page displays all contracts associated with the partnership.

## Maintaining Relationships

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

Partnership - Relationships page

See *and PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Working with the Relationship Viewer."

## Viewing and Maintaining Notes

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

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

---

## Setting Up Households

For complete information on setting up and maintaining households, see the *PeopleSoft Client Management 9.1 PeopleBook*.

See *and PeopleSoft Client Management 9.1 PeopleBook*, "Working with Wealth Management," Understanding Household Relationships.



## Chapter 6

# Setting Up Sites and Service Locations

This chapter provides an overview of service locations and discusses how to:

- Set up and maintain sites.
- Set up and maintain service location information.
- Set up services.
- Work with the service location finder.
- 

---

## Understanding Service Locations

This section discusses service locations and lists common elements.

### Service Locations

A *service location* for financial services is a place where a business contact can go to obtain authorized financial services. A service location is not restricted to a physical building owned by the financial institution. An automated teller machine (ATM) could be housed in a grocery store; an auto shop can perform insurance estimates.

A record for each service location is created in the RD\_SITE table. An extension table, RDFSITE, holds additional information for financial services.

---

**Note.** The RD\_SITE table stores site records and service locations. It is distinguished by an indicator field in the RDFSITE extension table.

---

It is important to distinguish the difference between a site and a service location.

- A *site* is used for an external customer to define places where it conducts business.
- A *service location* is a site that the internal company uses to provide services.

Usually service locations are tied to the same internal company. For example, your company has five branches or places to provide financial services and you have 100 business contacts that are companies. In this scenario, you create five service locations for your own company as the customer on service location setup page. In addition, you set up the 100 company business contacts, and create sites for each.

A *service* is an object that is maintained on the RBF\_SERVICE table. For each service location in your system you can associate services that are available at that location. The associated records are stored in RDFSITE\_SERVICE, a child table of RD\_SITE. You can also define the hours of operation for the location. Records for hours of operation are maintained on RDFSITE\_OPERATE, a child table of site.

You can also define the service location's contacts—the people who participate in business transactions at the location. Records for contacts are maintained in the person table (RD\_PERSON). When you associate a person with a service location, the person is assigned a role type of Contact and a record is created in the Business Object Relationship table (BO\_REL) to capture the representation relationship between the person and service location (RD\_SITE).

### See Also

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Site Business Objects"

## Common Elements Used in This Chapter

<b>Primary</b>	Click to view profile, status, and currency information for the service location, together with the primary name, address, telephone, and email information. The system displays this view by default when you access the Service Location page.
<b>Name</b>	Click to view and update the names associated with the service location.
<b>Address</b>	Click to view and update address information associated with the service location.
<b>Phone</b>	Click to view telephone information associated with the service location.
<b>Email</b>	Click to view email information associated with the service location.
<b>Pager</b>	Click to view pager information associated with the service location.

---

## Setting Up and Maintaining Sites

This section discusses how to:

- Set up and maintain sites.
- Manage account teams.
- View account plans.
- Define notes.
- Define site contacts.
- Define site relationships.

## Pages Used to Set Up and Maintain Sites

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Customers CRM - Site	RDFSITE_MAIN_2	<ul style="list-style-type: none"> <li>Customers CRM, Add Site, Site</li> <li>Customers CRM, Search Site, Site</li> </ul>	View and update primary information about the site, including name, address, phone, and email information.
Site - Account Team	RD_ACCOUNT_TEAM	<ul style="list-style-type: none"> <li>Customers CRM, Add Site, Site, Account Team</li> <li>Customers CRM, Search Site, Site, Account Team</li> </ul>	Manage the account team that is assigned to the site.
Site - Plans	RD_ACCOUNT_PLAN	<ul style="list-style-type: none"> <li>Customers CRM, Add Site, Site, Plans</li> <li>Customers CRM, Search Site, Site, Plans</li> </ul>	Create a new plan or view existing account plans for the site.
Site - Notes	RD_SITE_NOTE_2	<ul style="list-style-type: none"> <li>Customers CRM, Add Site, Site, Notes</li> <li>Customers CRM, Search Site, Site, Notes</li> </ul>	Add notes and attachments for the specified site.
Site - Contact Info page	RD_SITE_CNTCT_2	<ul style="list-style-type: none"> <li>Customers CRM, Add Site, Site, Contact Info</li> <li>Customers CRM, Search Site, Site, Contact Info</li> </ul>	View and update site contact information.
Site - Relationships	RD_SITE_REL_2	<ul style="list-style-type: none"> <li>Customers CRM, Add Site, Site, Relationships</li> <li>Customers CRM, Search Site, Site, Relationships</li> </ul>	View site relationships.

## Setting Up and Maintaining Sites

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

### Site

Save
Personalize

360 360-Degree View
Search
Next
Add Site
>>

Site Name A & P Food Stores #321
Site ID 300012

SetID FSI01

Site
Account Team
Plans
Notes
Contact Info
Relationships

Primary | Name

#### Profile Information

**Customer** GBI Bank

**Site Restrictions** ATM is inside the grocery store. Restricted by grocery store hours of operation.

**\*SetID** FSI01

**Privacy**  Do Not Contact  Do Not Email  
 Do Not Call  
 Do Not Mail

#### Purchasing Options

**Sold To Customer** This site can make purchases.

**Bill To Customer** This site can receive bills.

**Ship To Customer** This site can receive shipments.

#### Status and Currency Data

**\*Customer Status** Active

**Status Date** 10/16/2002

**Customer Since** 10/16/2002

**Segment Code** MED

**\*Currency** USD

**\*Currency Type** CRRNT

**Credit Rating Value**

**Assessment** Gold ★★★★★

Site page (1 of 2)

#### Contact Info Entries

**\*Description** Business [More...](#)

##### Phone

*Type	Country Code	Number	Ext/PIN
Business			
Cellular			
FAX			
Pager			

##### Email

*Type	Email Address
Business	
Other	

##### Address

[Look up Address](#)

**\*Type** Physical Location

**\*Country** United States

**Address 1** 103 Knollwood Rd

**Address 2**

**Address 3**

**City** White Plains

**County** WESTCHESTER

**State** NY New York

**Postal** 10601

[Set Display](#)

Site page (2 of 2)

See *and PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Site Business Objects," Maintaining General Site Information.

## Managing the Account Team

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

See *and PeopleSoft Strategic Account Planning 9.1 PeopleBook*, "Managing Accounts," Assigning a Team to an Account.

## Viewing Account Plans

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

See *and PeopleSoft Strategic Account Planning 9.1 PeopleBook*, "Creating Account Plans," Creating Account Plans.

## Defining Notes

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

The Notes page has no functionality or system data specific to industries. Refer to the following for details on core PeopleSoft CRM functionality and system data.

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

## Defining Site Contacts

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

The Contact Info page has no functionality or system data specific to industries. Refer to the following for details on core PeopleSoft CRM functionality and system data.

See *and PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Site Business Objects," Maintaining Site Contacts.

## Defining Site Relationships

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

The Relationships page has no functionality or system data specific to industries. Refer to the following for details on core PeopleSoft CRM functionality and system data.

See *and PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Site Business Objects," Defining Site Relationships.

## Setting Up and Maintaining Service Location Information

This section provides an overview of hours of operation and discusses how to:

- Define service location sites.
- Define service location services.
- Define service location hours of operation.
- Define service location notes.
- Define service location contacts.
- Define service location relationships.
- Define service location attributes.

### Understanding Hours of Operation

The basic logic behind setting up hours of operation follows these rules:

- If the Weekday and Specific Month fields are empty, it means the Day of the Week setting is applicable to all days of the weeks.
- If the Weekday field is filled with a day of the week, and the Specific Month field is empty, the hours of operation apply specifically to that day of the week.
- If the Weekday field is empty and the Specific Month field is filled, the hours of operation apply to all days in the specified month.
- If both the Weekday and Specific Month fields are filled, the hours of operation apply to all instances of the day of the week in the specified month.

### Pages Used to Set Up and Maintain Service Location Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Service Location - Site: Primary	RDFSITE_MAIN_2	<ul style="list-style-type: none"> <li>• Financial Services, Add Service Location, Site Click the Primary link.</li> <li>• Financial Services, Search Service Location, Site Click the Primary link.</li> </ul>	View and maintain name, profile, hours of operation, status and currency information for the service location.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Service Location - Site: Name	RDFSITE_MAIN_2	<ul style="list-style-type: none"> <li>Financial Services, Add Service Location, Site</li> </ul> <p>Click the Name link.</p> <ul style="list-style-type: none"> <li>Financial Services, Search Service Location, Site</li> </ul> <p>Click the Name link.</p>	View and maintain name.
Service Location - Services	RDFSITE_SERVICE_2	<ul style="list-style-type: none"> <li>Financial Services, Add Service Location, Services</li> <li>Financial Services, Search Service Location, Services</li> </ul>	Link the service locations to services that you have defined.
Service Location - Hours of Operation	RDFSITE_OPERATE_2	Financial Services, Search Service Location, Hours of Operation	Set up the hours of operation and holidays for the service location.
Service Location - Notes	RD_SITE_NOTE_2	<ul style="list-style-type: none"> <li>Financial Services, Add Service Location, Notes</li> <li>Financial Services, Search Service Location, Notes</li> </ul>	Add notes and attachments for the service location.
Service Location - Contact Info	RD_SITE_CNTCT_2	<ul style="list-style-type: none"> <li>Financial Services, Add Service Location, Service Location, Contact Info</li> <li>Financial Services, Search Service Location, Contact Info</li> </ul>	Associate contacts with the service location.
Service Location - Relationships	RD_SITE_REL_2	<ul style="list-style-type: none"> <li>Financial Services, Add Service Location, Relationships</li> <li>Financial Services, Search Service Location, Relationships</li> </ul>	Define relationships for the service location.

Page Name	Definition Name	Navigation	Usage
Service Location - Attributes	RB_ATTR_RUN_SITE	<ul style="list-style-type: none"> <li>Financial Services, Add Service Location, Attributes</li> <li>Financial Services, Search Service Location, Attributes</li> </ul>	Define attributes for the service location.

## Defining Service Location Sites

Access the Service Location - Site page (Financial Services, Add Service Location, Site).

### Service Location

Save | 360-Degree View | Search | Next | Add Site | >> Personalize

**Site Name** A & P Food Stores #321 **Site ID** 300012

**SetID** FSI01

Site | Services | Hours of Operation | Notes | Contact Info | Relationships | Attributes

Primary | Name

#### Profile Information

<p><b>Customer</b> GBI Bank <span style="float: right;">🔍 📅</span></p> <p><b>ABA Number</b> <input type="text"/></p> <p><b>Parent Location</b> <input type="text"/> <span style="float: right;">🔍 📅</span></p> <p><b>Number of ATMs</b> <input type="text" value="2"/></p> <p><b>Site Restrictions</b> <input type="text" value="ATM is inside the grocery store. Restricted by grocery store hours of operation."/> <span style="float: right;">🔍</span></p>	<p><b>Site Type</b> <input type="text" value="Express Bank"/></p> <p><b>*Site Status</b> <input type="text" value="Open"/></p> <p><b>Language Code</b> <input type="text" value="English"/></p> <p><b>Cross Street</b> <input type="text" value="Stadium Road"/></p>
---	--

#### Purchasing Options

**Sold To Customer** This site can make purchases.

**Bill To Customer** This site can receive bills.

**Ship To Customer** This site can receive shipments.

Service Location - Site page (1 of 2)

Status and Currency Data			
*Customer Status	Active		
Status Date	10/16/2002		
Customer Since	10/16/2002		
Segment Code	MED		
*Currency	USD		
*Currency Type	CRRNT		
Credit Rating Value			
Assessment	Gold ★★★★★		
Inquire Hours of Operation			
Hours of Operation	Tuesday Open From 08:00 AM		
Contact Info Entries			
*Description	Business <a href="#">More...</a>		
Phone			
*Type	Country Code	Number	Ext/PIN
Business			
Cellular			
FAX			
Pager			
Email			
*Type	Email Address		
Business			
Other			
Address			
<a href="#">Look up Address</a>			
*Type	Physical Location		
*Country	United States		
Address 1	103 Knollwood Rd		
Address 2			
Address 3			
City	White Plains		
County	WESTCHESTER		
State	NY <a href="#">New York</a>		
Postal	10601		
<a href="#">Set Display</a>			

### Service Location - Site page (2 of 2)

When you are adding a new service location, enter a location name using up to 50 alphanumeric characters and select an appropriate name type. By default, the information you enter will be the primary name for the service location. After the service location record is established, you can add additional names to the name record and designate another name as Primary using the Name view of this page.

The fields in the Profile Information group box provide basic information about the service location:

**Customer** Enter the name of the financial institution that is associated with the location.

**Site Type** Select the site type from the drop-down list. Delivered values are: *ATM Machine, Corporate Bank, Corporate Insurance, Express Bank, Full Service Bank, Insurance Estimate Office, and Personal Insurance*. Site types are configurable based on setID.

**ABA Number** Enter the American Banker's Association number.

<b>Site Status</b>	Select the site status from the drop-down list. Delivered values are: <i>Open</i> , <i>Closed</i> , <i>Pending Open</i> , and <i>Targeted for Closure</i> . Additional status types can be added to suit your organization's requirements.
<b>Parent Location</b>	Enter the location of the parent organization of the site.
<b>Language Code</b>	Select the language used in the service location.
<b>Number of ATMs</b>	Enter the number of ATMs available at the site.
<b>Cross Street</b>	Enter the name of the closest main intersection.
<b>Site Restrictions</b>	Enter information on restrictions at this site.

The fields in the Inquire Hours of Operation group box display details on the service location's operating hours on a specific date.

<b>Date</b>	Select a date and click Go to display the hours of operation for that date.
-------------	---

The fields in the Status and Currency Info group box indicate whether the service location definition is active in your system and provide information about currency.

<b>Customer Status</b>	Indicate whether the service location record is <i>Active</i> or <i>Inactive</i> . The default value is <i>Active</i> .
<b>Status Date</b>	The date that the current customer status value was specified.
<b>Customer Since</b>	The date the service location became a customer for your business.
<b>Currency Code</b>	Enter the code that specifies the currency used for a monetary transaction with this service location. Currency codes are maintained using the Currency Code page under the Define General Options menu.
<b>Currency Type</b>	Enter the exchange rate used to calculate monetary transaction amounts in alternate currencies. Exchange rates are established on the Market Rate Type page under the Define General Options menu.
<b>Segment Code</b>	Indicate the service location's business segment for marketing purposes. Segment codes are established on the Segment Code page under the Structure Customer menu.

### **See Also**

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Company Business Objects,"  
Defining Company Contacts

## Defining Service Location Services

Access the Service Location - Services page (Financial Services, Add Service Location, Services).

### Service Location

Save | 360 360-Degree View | Search | Next | Add Site | >>
Personalize

**Site Name** A & P Food Stores #321  
**SetID** FSI01

**Site ID** 300012

Site
Services
Hours of Operation
Notes
Contact Info
Relationships
Attributes

#### Services Provided at this Location

Customize | Find | [?] | First 1-4 of 4 Last

*Service Name	Start Date	End Date	Last Modified By	Last Modified		
Teller Service	10/16/2002	01/01/2999	FSISAMPLE	10/16/2002 10:39AM	+	-
Banking ATM	10/16/2002	01/01/2999	FSISAMPLE	10/16/2002 10:39AM	+	-
Checking	10/16/2002	01/01/2999	FSISAMPLE	10/16/2002 10:39AM	+	-
Saving	10/16/2002	01/01/2999	FSISAMPLE	10/16/2002 10:39AM	+	-

Service Location - Services page

**Service Name** Select a service that will be available at the service location. Services are defined on the Services page.

**Start Date and End Date** Select the start date for the service and end date, if applicable.

## Defining Service Location Hours of Operation

To set up hours of operation:

1. Set up record for majority hours of operation.

For example, designate the Type of Setting as day of the week, and operation Open from 9:00 AM to 5:00 PM, without selecting specific weekdays or a specific month.

2. For a specific day of week that has different hours of operation, specify Day of the Week, for example Thursday, and select Open from 9:00AM to 7:00PM.

This will override the setting in step one for all Thursdays.

3. To define Hours of Operation for all days in a month, select Specific Month and leave Weekday blank.

To change Hours of Operation for all instances of a day — all Fridays — in a specific month, select the Weekday and the Specific Month.

4. To define the Hours of Operation for a specific date—December 25—enter the date in the Specific Date field.

Access the Service Location - Hours of Operation page (Financial Services, Search Service Location, Hours of Operation).

### Service Location

Save | 360 360-Degree View | Search | Next | Add Site | >> Personalize

**Site Name** A & P Food Stores #321 **Site ID** 300012

**SetID** FSI01

Site | Services | Hours of Operation | Notes | Contact Info | Relationships | Attributes

#### Set Up Hours of Operation

Customize | Find | 1-9 of 9 | First | Last

*Type of Setting	Weekday	Specific Month	Specific Date	Operation	From Time	To Time		
Day of the Week	1 - Sunday			Open	8:00AM	8:00PM	+	-
Day of the Week	2 - Monday			Open	8:00AM	10:00PM	+	-
Day of the Week	3 - Tuesday			Open	8:00AM	10:00PM	+	-
Day of the Week	4 - Wednesday			Open	8:00AM	10:00PM	+	-
Day of the Week	5 - Thursday			Open	8:00AM	10:00PM	+	-
Day of the Week	6 - Friday			Open	8:00AM	10:00PM	+	-
Day of the Week	7 - Saturday			Open	8:00AM	10:00PM	+	-
Specific Date	4 - Wednesday	12 - December	12/25/20	Closed			+	-
Specific Date	5 - Thursday	12 - December	12/25/20	Closed			+	-

Service Location - Hours of Operation page

**Type of Setting**

Select *Day of the Week* or *Specific Date* to determine how you will define the hours of operation.

When you choose *Day of the Week*, you do not need to fill in the specific date field. You can optionally fill in the *Weekday* and *Specific Month* field.

When you choose *Specific Date*, the Specific Date field must be filled in, and Weekday and Specific Month fields will be defaulted by date field. If Specific Date is defined, then the system will use it for hours of operation, ignoring any data defined in type of Day of the Week.

**Weekday**

Use this field in conjunction with the *Day of the Week* type of setting.

**Specific Month**

Use this field in conjunction with the *Day of the Week* type of setting. This field can be used to specify the hours of operation for all Tuesdays in a month.

**Specific Date**

Select a specific date to define the hours of operation.

**Operation**

Select *Open* or *Closed*.

**From Time/To Time**

Use the from and to times to define hours of operation.

## Defining Service Location Notes

Access the Service Location - Notes page (Financial Services, Add Service Location, Notes).

Use the Notes page to add, view, and modify notes associated with a service location record.

### **See Also**

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

## Defining Service Location Contacts

Access the Service Location - Contact Info page (Financial Services, Add Service Location, Contact Info).

Use the Contact Info page to view and maintain contact information for service locations.

### **See Also**

*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Working with Contacts"

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Defining Company Business Objects,"  
Defining Company Contacts

## Defining Service Location Relationships

Access the Service Location - Relationships page (Financial Services, Add Service Location, Relationships).

Use the relationships page to view and maintain service location relationships.

### **See Also**

*PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Working with the Relationship Viewer"

## Defining Service Location Attributes

Access the Service Location - Attributes page (Financial Services, Add Service Location, Attributes).

Use the attributes page to view and maintain service location attributes.

### **See Also**

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

## Setting Up Services

You set up standard services that can be applied to any service location.

This section discusses how to:

- Define a service.
- Link the service with service locations.

### Pages Used to Set Up Services

Page Name	Definition Name	Navigation	Usage
Service	RBF_SERVICE	Financial Services, Service, Service	Add and maintain services that are offered by your organization.
Service Locations	RBF_SERVICE_SITE	Financial Services, Service, Service Locations	View locations currently offering this service. Service locations appear by default from the Service Locations component.

### Defining a Service

Access the Service page (Financial Services, Service, Service).

Service page

**Service Type**

Select the service type. Delivered values are: *Banking, Business Banking, Insurance, Loan Service, Mortgage, Personal Banking, and Wealth Management*. Additional service types can be added to suit your organization's requirements.

**Service name**

Enter the name of the service offered.

**Description** Describe the service offered.

## Linking the Service with Service Locations

Access the Service Locations page (Financial Services, Service, Service Locations).

The screenshot shows a web interface with two tabs: 'Service' and 'Service Locations'. The 'Service Locations' tab is active. Below the tabs, there are two fields: 'Service Type' with the value 'Banking' and 'Service Name' with the value 'Banking ATM'. Below these fields is a table titled 'Locations Currently Offering the Service'. The table has a header row with 'Location' and 'Type'. There are 8 rows of data, each with a location name and a type. The table also includes a 'Customize' link, a 'Find' button, and pagination controls showing '1-8 of 8'.

Locations Currently Offering the Service		Customize	Find	First	1-8 of 8	Last
Location	Type					
Scott Blvd	Corporate Bank					
PeopleFood Store #19	ATM Machine					
PeopleFood Store #33						
Homestead Ave						
GBI Bank - White Plains Branch	Full Service Bank					
A & P Food Stores #321	Express Bank					
White Plains Galleria	ATM Machine					
Santa Clarry	Express Bank					

Service Locations page

The system displays the locations that are currently offering the service. Click the Edit button on the location row to access the Service Location component, where you can view and update the service location record.

### See Also

[Chapter 6, "Setting Up Sites and Service Locations," page 53](#)

## Working with the Service Location Finder

The Service Location Finder is available to the customer in My View and to the financial services employee in the 360-Degree View. The Service Location Finder can be accessed without entering personal or account information.

Customers and employees can search by service name or any address element. Note that this search returns records based on exact match not based on distance or vicinity of an address.

The summary section displays a list of service locations that meet the criteria. The summary section is based on the view RBF\_SITE\_SRH\_VW. The View is a join of service location, service, and address information. Only records matching the following criteria can be searched against:

- Service locations with a valid status such as *Open* or *Target for Closure*.
- Service locations with valid address of Physical Location purpose type.
- Services associated with the service location that is current—start-date and end-date range is neither back dated nor in the future.

When the financial services employee clicks the Location link, the system displays the Service Locations component.

When the customer clicks the Location link, the system displays a Service Location page with details on the location, services, hours of operation, and contact information.

The system displays a grid with all service locations meeting the criteria. Click the Location link to view details.

## Chapter 7

# Understanding the 360-Degree View for Industries

This chapter discusses:

- The 360-degree view.
- Transactions in the 360-degree view.

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## The 360-Degree View

The 360-Degree View enables you to manage transactions and interactions for a business object—a customer or contact of customer, site or contact of site, partner or contact of partner, or worker. The 360-degree view provides both an entry point for interactions with the business object and a central point from which to launch transactions, such as quote and order creation, case creation, or opportunity creation.

PeopleSoft CRM delivers predefined data for the 360-degree view; including nodes, grid definitions, transactions that are associated with nodes and transaction groups. You can set up 360-degree view trees and pages that use this predefined system data. You set up additional information only if you need to change defaults.

See *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up the 360-Degree View." and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Using the 360-Degree View."

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## Transactions in the 360-Degree View

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 Actions drop-down box on the upper right corner of the 360-Degree View page. This section discusses:

- Transactions common to all industries.
- Transactions for the financial services industries.
- Transactions for the insurance industry.
- Transactions for the communications industry.
- Transactions for the energy industry.

## Transactions Common to All Industries

PeopleSoft CRM delivers predefined data for the 360-Degree View. The transaction group, *Core*, is delivered with these transactions:

- Add Agreement
- Add Service Order
- Add Case
- Search Cases
- Add Defect
- Add Installed Product
- Installed Product Hierarchy
- Add Lead
- Add Opportunity
- Add Order
- Add Quote
- Product Registration
- Add RMA

## Transactions for the Financial Services Industries

The transaction group, *FSITRANS*, delivers these transactions for the financial services industries:

<b>Transaction</b>	<b>Description</b>
Account Address Change	Change the address for selected accounts.
Account Nickname	Add or change an account nickname.
Automatic Funds Transfer	Automate transfer with account, frequency, start and end date.
Pay Bills	View current bill payees or set up new payee information.
Reverse Transaction Fee	Back out transaction fees that have already been charged.
Issue ATM Card	Modify an existing card or issue a new card.
Modify Account	Modify details on an account such as the account fee, account relationships, credit card parameters, currency, product, status, or TIN type and number.

<b>Transaction</b>	<b>Description</b>
Order Cashier's Check	Order a cashier's check and provide delivery details.
Order Copy of Check	Order duplicate copy of an existing check.
Order Copy of Statement	Order duplicate copy of statement.
Order Foreign Currency	Enter account and delivery details for foreign currency order.
Order Traveler's Checks	Enter account, denomination, and delivery details for traveler's checks.
Reorder Checkbook	Order new checkbook with starting number information.
Stop Check Payment	Stop payment on a check.
Transfer Funds	One time fund transfer between accounts with account and amount information.

## Transactions for the Insurance Industry

The transaction group, *INSTRANS*, delivers these transactions for the insurance industry:

<b>Transaction</b>	<b>Description</b>
Change Policy	Make changes to a policy such as add a driver, delete a driver, change the address, or change the vehicle.
Add First Notice of Loss	Select policy number from a list of customer's policies. Create the FNOL (first notice of loss) from the Policy Details page.  Add First Notice of Loss is only available if the customer has an active property and casualty policy.
Add Quote	On the Insurance Quote page, initiate a quote for a new policy or a policy change.

## Transactions for the Communications Industry

The transaction group, *COMTRANS*, delivers these transactions for the communications industry:

<b>Transaction</b>	<b>Description</b>
Add Account	Add a new account.

<b>Transaction</b>	<b>Description</b>
Maintain Service	Manage customer service requests. You can change, suspend, resume, or disconnect services.
Add Service Order	Create a new service order.
Add Agreement	Search for agreement lines or warranties that cover the case or service order and display the associated entitlements.
Installed Product Hierarchy	View the installed products that meet the customer, site, product, serial number, asset tag, and department criteria.
Report Lost or Stolen Handset	File a report for a lost or stolen handset.

## Transactions for the Energy Industry

The transaction group, *ENERGYTRANS*, delivers these transactions for the energy industry:

<b>Transaction</b>	<b>Description</b>
Add Account	Add a new account.
Start Service	Initiate service for a new or existing customer at a new premise where the services have already been established.
Stop Service	Discontinue service at a premise.
Transfer Service	Transfer the association of services between premises.

## Chapter 8

# Configuring Application Security

This chapter provides an overview of the Security Object model and discusses how to define and maintain security.

### **See Also**

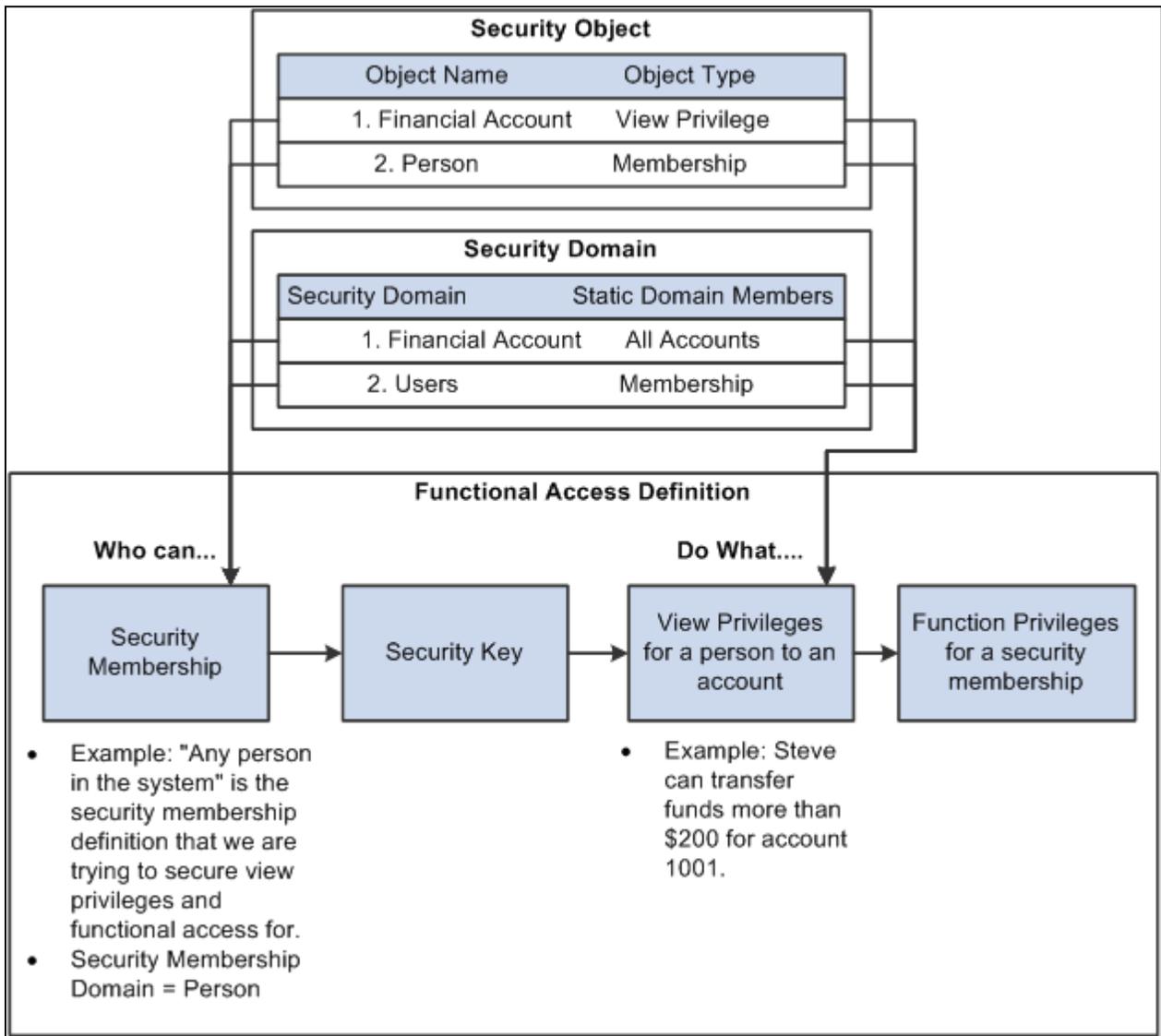
*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up Security and User Preferences"

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## Understanding the Security Object Model

In the financial services and insurance industries, every financial account and policy has a matrix of security rules. This security matrix contains information about an individual's reach and limit for a particular account. The Security Object model contains the matrix of security rules. When creating or maintaining an account, security keys are created.

The following diagram shows the process flow of the Security Object model, showing the interaction between persons, security privileges, and actions that can be performed.



Security Object model

### Security Objects

Security objects are delivered with the system. Any changes to the security objects affect security keys and the security list table. For this reason, PeopleSoft recommends limiting the number of security objects created. Two security objects are delivered. The Financial Account security object (ACCOUNT) is a view privilege type security object, and the Authorized Users (ACCOUNTHOLDER) is a membership type security object. Both objects are system data. Not all objects can be used as security objects.

### Security Membership Domain

The security domain for the aforementioned security objects is a static list. The view object domain of the Financial Account object consists of all available accounts. Although these security domains are delivered and designed as static lists, you can define your own dynamic domains.

## Security Keys

Security keys are created for each individual that takes part in the security model. One security key is generated for each individual. Security keys are created and maintained by either enterprise integration points, or by the online security matrix component.

---

## Defining and Maintaining Security

This section provides an overview of security definitions and maintenance, and discusses how to:

- Maintain the security matrix.
- Review access trace information.
- Set up navigation security.

## Understanding Security Definition and Maintenance

The administrator uses the security matrix to define and maintain permissions granted to system users. Each row in the matrix represents a specific transaction for a specific account.

The security matrix can be populated using the Security Matrix page or programmatically.

Use the Security Matrix page to add, delete, or update rows in the security matrix.

Enterprise integration points are used to create financial accounts and their security. The inbound EIP receives the security matrix data, and the subscription code creates the security keys.

Each time an agent accesses a customer account through the 360-Degree View page, the security trace provides an audit trail.

The administrator uses navigation security to show or hide individual component items in the PIA navigation of the Agent view. Permission lists and roles determine portal navigation. Navigation security layers control access to specific menu items on top of that. This security layer would hide an item even though the user has access to the component.

To maintain the security matrix, use the RBF\_SRTY\_MTRX\_SRCH component.

To review access trace information, use the RBF\_SRTY\_ACTR\_SRCH component.

To set up navigation security, use the RBF\_NAV\_SECURITY component.

To define role mapping, use the RBF\_ROLE\_MAPPING component.

## Pages Used to Define and Maintain Security

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Security Matrix	RSEC_SRTY_MAT_SRCH	Set Up CRM, Security, Financial Services, Security Matrix	Define permissions granted to system users.
Security Trace Access	RBF_SRTY_TRC_SRCH	Set Up CRM, Security, Financial Services, Access Trace, Security Trace Access	View an audit trail of all user account access.
Navigation Security	RBF_NAV_SECURITY	Set Up CRM, Security, Financial Services, Navigation Security	Grant or remove access to content on the portal pages. Hide certain pages for a particular PeopleTools role even though role users have access to the components.
Role Mapping	RBF_ROLE_MAPPING	Set Up CRM, Security, Financial Services, Role Mapping	Map roles.
Sales Process Verification Key	RBF_SALES_VKEY	Set Up CRM, Security, Financial Services, Sales Process Verification Key	Validates employee status.

## Maintaining the Security Matrix

Access the Security Matrix page (Set Up CRM, Security, Financial Services, Security Matrix).

Main Info		Audit Info		
Contact Name	Account Number	Transaction Code	Approved	
Kevin Jordan	50002	TMON	<input type="checkbox"/>	
Kevin Jordan	50002	REQUI	<input checked="" type="checkbox"/>	
Kevin Jordan	50002	CMPL	<input checked="" type="checkbox"/>	
Kevin Jordan	50002	CLOS	<input checked="" type="checkbox"/>	
Kevin Jordan	50002	CLM	<input checked="" type="checkbox"/>	
Kevin Jordan	50002	APPL	<input checked="" type="checkbox"/>	
Kevin Jordan	50002	AFTS	<input checked="" type="checkbox"/>	
Kevin Jordan	50005	TSEC	<input checked="" type="checkbox"/>	
Kevin Jordan	50005	TMON	<input checked="" type="checkbox"/>	
Kevin Jordan	50005	STOP	<input checked="" type="checkbox"/>	
Kevin Jordan	50005	SECX	<input checked="" type="checkbox"/>	
Kevin Jordan	50005	SCON	<input checked="" type="checkbox"/>	
Kevin Jordan	50005	SCHK	<input checked="" type="checkbox"/>	

Security Matrix page (1 of 2)

Conditional Operator	Conditional Amount	Message Set Number	Message Number		
Less Than	2,000.00			+...	-
				+...	-
				+...	-
				+...	-
				+...	-
				+...	-
				+...	-
				+...	-
Less Than	5,000.00	18146	3	+...	-
				+...	-
		18146	5	+...	-
				+...	-
Less Than	5,000.00	18146	3	+...	-

Security Matrix page (2 of 2)

**Main Info Page**

- Account Number** Select the applicable account number. You need one row for each allowable transaction on the account. You must have at least one row for each account; however, you may have multiple rows per account.
- Transaction Code** Specifies the type of financial transaction for which the security is built.
- Approved** Select to indicate that the transaction is allowed for this account.
- Conditional Operator** Select if the transaction is allowed with a condition and populate operator applicable for the condition.
- Conditional Amount** Select the amount for the condition.
- Message Catalog Set Number** Displays the message catalog entry that a user sees when denied to perform a transaction due to insufficient security.

**Audit Info Page**

Access the Security Matrix page: Audit Info tab (audit information).

Main Info		Audit Info		
Contact Name▲	Account Number	Transaction Code	Approved	Added By
Ed Stanton	99151	ALL	<input checked="" type="checkbox"/>	
Ed Stanton	17319	ALL	<input checked="" type="checkbox"/>	
Ed Stanton	17331	ALL	<input checked="" type="checkbox"/>	
Ed Stanton	50223	ALL	<input checked="" type="checkbox"/>	
Jade Jordan	125001	ALL	<input checked="" type="checkbox"/>	
Jade Jordan	CHK1001	ALL	<input checked="" type="checkbox"/>	
Janet Ashford	99861	ALL	<input checked="" type="checkbox"/>	
Kevin Jordan	50018	ALL	<input checked="" type="checkbox"/>	WMSAMPLE
Kevin Jordan	50012	ALL	<input checked="" type="checkbox"/>	WMSAMPLE
Kevin Jordan	50017	ALL	<input checked="" type="checkbox"/>	WMSAMPLE

Security Matrix page: Audit Info tab

The system displays an audit trail of all additions and modifications to the security matrix.

## Reviewing Access Trace Information

Access the Security Trace Access page (Set Up CRM, Security, Financial Services, Access Trace, Security Trace Access).

The screenshot shows the 'Security Trace Access' interface. At the top, there is a search section with a 'Use Saved Search' dropdown, and four filter rows: 'Agent Login ID' (operator '=', value field), 'Business Contact' (operator 'begins with', value field), 'Start Date/Time' (operator '=', value field, 'Time' field), and 'End Date/Time' (operator '=', value field, 'Time' field). Below the filters are 'Search' and 'Clear' buttons, and links for 'Basic Search', 'Save Search Criteria', 'Delete Saved Search', and 'Personalize Search'. A 'File Name (in relative path only):' input field is located below the search section. The main area displays a table of search results with columns: Select, Agent Login ID, Business Contact Name, Start Date/Time, and End Date/Time. The table contains five rows of data for agent 'FSIAGENT' and contact 'Kevin Jordan'.

Select	Agent Login ID	Business Contact Name	Start Date/Time	End Date/Time
<input checked="" type="checkbox"/>	FSIAGENT	Kevin Jordan	09/04/2001 11:53:44AM	
<input checked="" type="checkbox"/>	FSIAGENT	Kevin Jordan	09/05/2001 5:10:54PM	09/05/2001 5:10:54PM
<input checked="" type="checkbox"/>	FSIAGENT	Kevin Jordan	09/05/2001 5:11:22PM	09/05/2001 5:11:22PM
<input checked="" type="checkbox"/>	FSIAGENT	Kevin Jordan	09/04/2001 11:55:21AM	
<input checked="" type="checkbox"/>	FSIAGENT	Kevin Jordan	10/08/2001 2:58:36PM	

Security Trace Access page

**Start Date/Time** Displays when the agent accessed the customer accounts through 360-Degree View page.

**End Date/Time** Displays when the agent released the 360-Degree View page. Using the Back on the browser toolbar does not release the 360-Degree View page. The agent can still access the page by clicking Agent View or the forward button. If the agent signs out of the PeopleSoft application by clicking the Sign Out link or closing the browser, the closing timestamp not recorded. To release the 360-Degree View page and record the closing timestamp, click the Finish and Return to Search link on the 360-Degree View page.

## Setting Up Navigation Security

Access the Navigation Security page (Set Up CRM, Security, Financial Services, Navigation Security).

## Navigation Security

**Role Name** FSI Agent  
**Portal Name** EMPLOYEE  
**Portal Label** Customer Accounts

**Content Reference List** [Customize](#) | [Find](#) | [View All](#) | [Print](#) | [Grid](#) | [First](#) | [1-16 of 16](#) | [Last](#)

Portal Label	Hide Folder
Change Account Nickname	<input type="checkbox"/>
Change Account Address	<input type="checkbox"/>
ATM Card Detail	<input type="checkbox"/>
Issue ATM Card	<input type="checkbox"/>
Review Financial Accounts	<input checked="" type="checkbox"/>
Review Financial Account	<input checked="" type="checkbox"/>
Modify Account	<input type="checkbox"/>
Application Form - Home Owner	<input type="checkbox"/>
Review Billing Accounts	<input type="checkbox"/>
Change Policy	<input type="checkbox"/>
View Policies	<input type="checkbox"/>
Review Policy	<input type="checkbox"/>
Add Account	<input type="checkbox"/>
Review Billing Accounts	<input type="checkbox"/>
Search Accounts	<input type="checkbox"/>

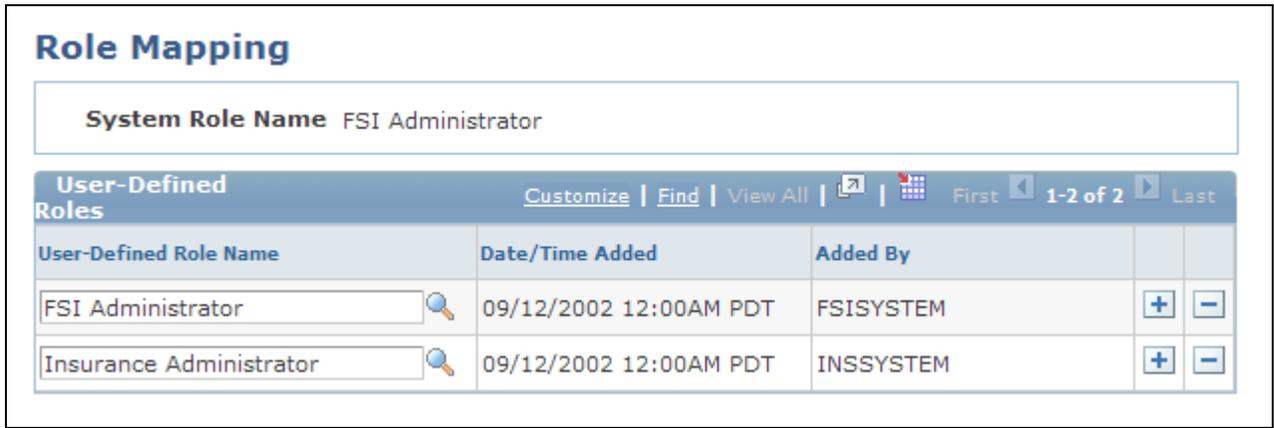
[Select All](#)  [Clear All](#)

Navigation Security page

- Role Name** PeopleTools role for which navigation security is applied.
- Portal Name** Portal name in which the left navigation menu item is secured.
- Portal Label** Label name of the left navigation menu for which security is applied.

## Defining Role Mapping

Access the Role Mapping page (Set Up CRM, Security, Financial Services, Role Mapping).



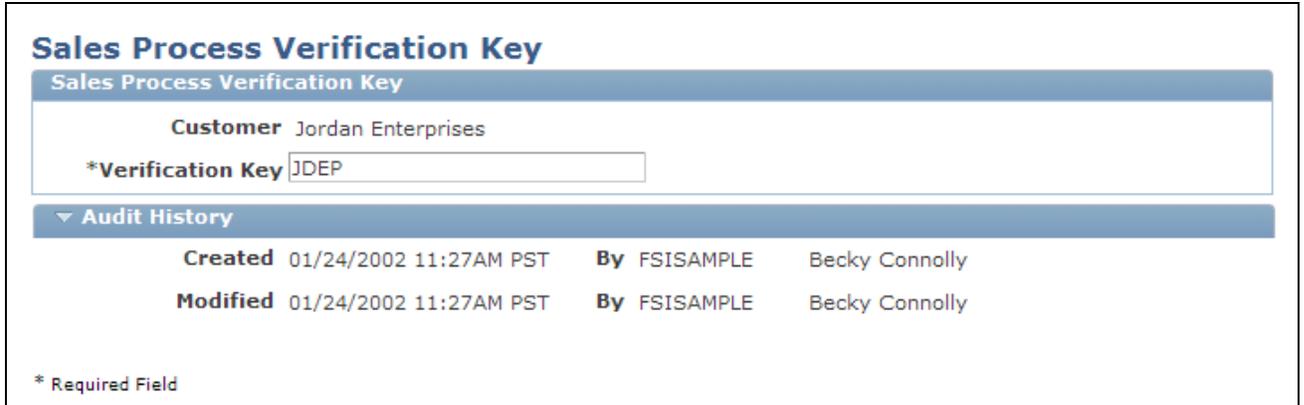
Role Mapping page

**System Role Name** Lists the system-defined roles delivered.

**User - Defined Role Name** Lists the customer's roles that will be mapped to the system-defined roles.

## Defining Sales Process Verification Keys

Access the Sales Process Verification Key page (Set Up CRM, Security, Financial Services, Sales Process Verification Key).



Sales Process Verification Key page

**Verification Key** Used in the sales process to verify employment of employees and existence of company contract.

### See Also

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

## Chapter 9

# Working with Churn Management

This chapter provides overviews of churn management and the churn management process flow, and discusses maintaining churn management.

---

## Understanding Churn Management

In the communications industry, the competition among service providers is fierce. The tendency for customers to switch from one competing service provider to another is called *churn*. Churn management identifies valuable customers in your company who are likely to churn and executes proactive as well as reactive actions to prevent them from churning.

In churn management, two customer metrics are tracked in the system: churn score and customer value.

- *Churn score* results from the calculation of customer behavior performed by an external data warehouse and/or data mining application.
- *Customer value* results from the analysis of customer value performed by an external application.

Through application messaging, these values are fed to the CRM system periodically from an analytics application such as PeopleSoft CRM Warehouse, and are updated in the Attribute page under the Consumer component. These values can be changed manually at any time, but they will be overwritten the next time that the information is refreshed.

Customer service representatives (CSRs) can see the customer's churn score in the 360–Degree View when they open up a consumer record. The CRM system evaluates the customer's churn score (in the Attribute page) against the pre-defined churn score set values and displays the corresponding churn image under the Profile pagelet. In this pagelet, the CSR can click the Churn Actions Image to view possible actions (a display of scripts associated to the churn score set the customer belongs to) that can be taken to retain the customer.

PeopleSoft provides churn action history as a reference to help the CSR decide whether an action should be taken, or which action to take. The CSR can look at churn history to find out what actions (Scripts) have been completed for the customer (useful if the CSR wants to avoid repeating certain actions) and their results. Churn action history also displays customer value, which serves as a good indicator to help the CSR to focus the retention effort to those customers that are valuable. By looking at the customer value, the CSR can prioritize and choose to take Churn actions for a very valuable customer over a less valuable customer, even though they might have the same churn propensity.

### **CDH Customer Merge**

If CDH integration is activated in the system, merge routines are used to handle the consolidation of customer records for churn action history.

See *and PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Understanding Customer Data Hub Integration."

---

## Understanding the Churn Management Process Flow

The following diagrams illustrate the business process flow for churn management in two parts:

- Updating consumer records for communications.
- Using churn actions in the 360-Degree View.

### Update Consumer Records

The first part of the flow is the integration between an external analytics system and the communications solution, where churn score and customer value are sent to the CRM system to update consumer records.

This diagram shows the churn management process flow from the analytics system to PeopleSoft CRM:



Churn management integration

### Use of Churn Management in the 360-Degree View

The second part of the flow starts when customer interaction takes place in the 360-Degree view.

This diagram shows the churn management process flow, beginning with the customer call and detailing the steps in determining whether churn management actions should be taken:

Upon identifying the customer in the 360-degree view, the Active Analytics Framework is invoked to determine the satisfaction level of the customer based on the customer's churn score. The CSR can click on the Churn icon to see a list of actions that can be taken to improve the chances of retaining a high level of customer satisfaction. The CSR can also see the history of actions taken in the past. Actions are scripts that can be executed by the user.

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

---

## Maintaining Churn Management

This section discuss how to:

- Define churn scores.

- Define scripts with script type *Churn*.
- View churn scripts and history.

To define churn scores, use the RBT\_CHURN\_SETUP component.

## Pages Used to Manage Churn

Page Name	Definition Name	Navigation	Usage
Churn Score Setup	RBT_CHURN_SETUP_PG	Set Up CRM, Product Related, Communications, Churn Score Setup, Churn Score Setup	Use this page to associate churn scores (in range) with churn images.
Script	RC_BS_MAIN	Set Up CRM, Common Definitions, Process Automation, Script, Script	Use this page to define additional scripts to be executed for churn events.
Churn Actions	RBT_DISP_SCRIPT_PG	Customer Accounts, Search Accounts, Account  On the 360-degree view, click the Churn Actions Details button.	Use this page to view the churn history and possible actions CSR can take against churn. This page is only accessible through the 360 - Degree View.

## Defining Churn Scores

Access the Churn Score Setup page (Set Up CRM, Product Related, Communications, Churn Score Setup, Churn Score Setup).

**Churn Score Setup**

SetID COM01

Churn Score Setup				Customize   Find   View All   First 1-3 of 3 Last	
Minimum Score	Maximum Score	Score Icon	Description		
1	10	PS_CHURN_LOW_ICN	Low Propensity to Churn	+	-
11	20	PS_CHURN_MEDIUM_ICN	Medium Propensity to Churn	+	-
21	30	PS_CHURN_HIGH_ICN	High Propensity to Churn	+	-

Churn Score Setup page

**SetID** Display the setID of the churn.

**Minimum Score** Enter the minimum score of the churn rule.

<b>Maximum Score</b>	Enter the maximum score of the churn rule.
<b>Score Icon</b>	Click to select the icon that will be displayed in Interaction Manager when the customer churn score falls in this range.
<b>Description</b>	Enter a description of the associated churn event.

## Defining Scripts

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

The screenshot shows the 'Script' page with the following details:

- Script Detail:**
  - SetID: COM01
  - Effective Date: 02/12/2002
  - Script Name: \$50 Service Credit
  - Script Category: Branch Script
  - Description: Offer of \$50 rebate for customers willing to commit to service for another 12 months.
  - \*Status: Active
  - \*Script Type: Churn
- Rating Detail:**
  - Rate Set Name: [Empty]
  - Script Total Weight: 10
- Script Actions:**
  - Pre-Script Action: [Empty]
  - Post-Script Action: [Empty]
  - Incomplete Script Action: [Empty]
- Exit Message:**
  - Exit Message: [Empty]
  - Display Token: [Button]

Script page

PeopleSoft CRM comes with three script templates for churn management, *\$50 Service Credit*, *Wireless Plan Picker* and *Customer Satisfaction*. Access the Script page if you want to create additional scripts to be associated with events.

Be sure to select *Churn* as the Script Type in order for the script to be available when you set up churn events.

### See Also

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

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Running Scripts"

## Viewing Churn Actions and History

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

Execute Script page

### Scripts

The Scripts section displays a list of possible Churn scripts that the CSR can use to retain customers. Churn actions differ based on Churn Score.



Click to execute the script.

### Script History

The Script History section displays a list of churn actions that were taken in the past and their results. The results are displayed based on the configuration setup to display the history of actions. The configuration RBTPASTACTIONS is defined in the Communications Set Up component.

**Action** Indicate the name of the action that was taken.

**Churn Score** Indicate consumer's churn score at the time the action was taken.

**Customer Value** Indicate consumer's value at the time the action was taken.

**See Also**

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Running Scripts"*

---

## Integration to Import the Churn Score

RBT\_CHURN\_MSG is an inbound message provided to update the Churn Score and Customer Value provided by an Analytical system, of the Customer associated with the Billing Account. This message contains the Billing Account Number, Churn Score and the Customer Value.

## Chapter 10

# Working with Fraud Management

This chapter provides an overview of fraud management and discusses how to:

- Set up fraud management.
- Manage fraud cases.

---

## Understanding Fraud Management

The communications solution offers the fraud management functionality to combat fraudulent activities that cause huge impacts to the communications industry - decrease in revenue, increase in the use of resources for unprofitable businesses, and so on.

Fraud management provides a mechanism to facilitate interactions between customer service representatives (CSRs) and fraudulent customers. The solution consists of two primary components: identifying fraud and addressing fraud.

You load fraud data from external fraud management systems through a batch process that is run periodically. The batch load program reads the input data file that comes in the following format [account\_number][fraud\_score] (for example, 1002400010|12). Based on the fraud data, it creates a fraud case for each suspected account and assigns the associated fraud score to the case as an attribute.

Fraud cases contain information of a sensitive nature and therefore should not be exposed to all users. In order to limit fraud case access to those people who are directly involved in fraud management, PeopleSoft CRM provides a pre-set business unit—FRAUD—solely for fraud case tracking purposes. Fraud cases are not visible to users who do not belong to this business unit.

After fraud cases are created, the batch load program assigns them to a special provider group—Fraud Team—created just to handle fraud cases and sends notification to the fraud worklist.

PeopleSoft CRM provides a business project template for fraud (TELCO\_FRAUD\_CS). While it can be implemented as delivered to handle fraud, you can use this template as a reference, and leverage tasks when setting up your own business project.

Attribute support is enabled for the fraud case type, which allows you to view the fraud score of the customer in a fraud case.

---

## Understanding the Fraud Management Process Flow

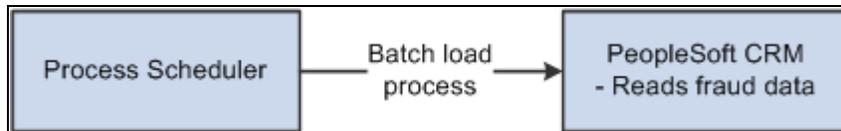
The following diagrams illustrate the business process flow for fraud management in two parts:

- Updating fraud data.
- Managing fraud.

## Update Fraud Data

The first part of the flow is the loading of fraud data from an external system through a batch process. You can set up a Process Scheduler process to load fraudulent accounts data periodically.

This diagram shows the fraud management business process flow:

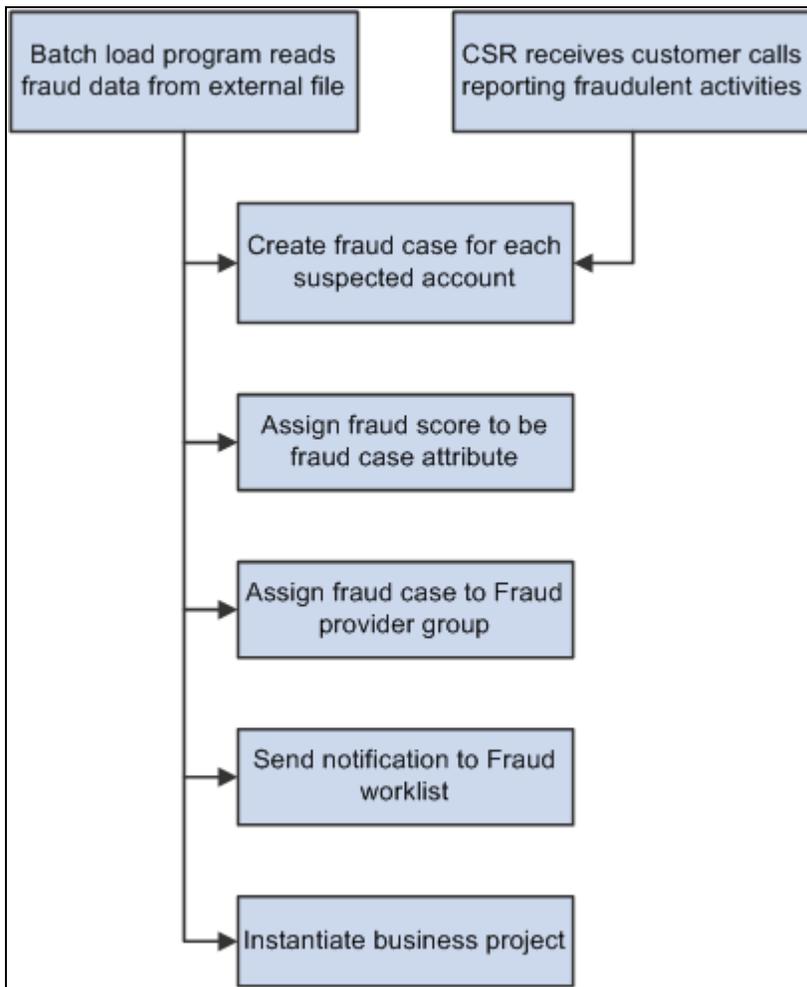


Fraud management business process flow

## Manage Fraud

After fraud data is loaded into the CRM system, the batch load program executes a series of actions to manage fraud.

This diagram shows the fraud management business process flow:



Fraud management business process flow

## Setting up Fraud Management

This section discusses how to:

- Create a business unit for fraud.
- Create a provider group for fraud.

### Creating a Business Unit for Fraud

PeopleSoft provides a business unit—*FRAUD*—created specifically for fraud case tracking. Fraud cases are only visible to users who belong to the *FRAUD* business unit. If you want to set up your own business unit, ensure that the fraud business unit is defined (as a call center business unit) with the variable *FRAUDBU* that is used by the batch load program to identify the fraud business unit.

See *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Working with Business Units and TableSet Controls," Defining Business Units and TableSet Controls.

## Creating a Provider Group for Fraud

PeopleSoft provides a default provider group *Fraud Team* created specifically to handle fraud cases. If you want to set up your own provider group, be sure that the fraud provider group is defined with the variable *FRAUDPG* to be used by the batch load program for case assignment.

See *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Maintaining Provider Groups and Group Members."

---

## Managing Fraud

This section discusses how to:

- Load fraud data from an external application.
- Create a fraud case.
- View attributes associated with a fraud case.
- View the fraud business project template.

## Pages Used to Manage Fraud

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Load Fraud Data	RCT_FRAUD_FILEPRCS	Set Up CRM, Product Related, Communications, Load Fraud Data, Load Fraud Data	Use this page to schedule fraud data to be loaded periodically using Process Scheduler.
Case	RC_CASE_SW	Support, Add Case, Case	Use this page to create fraud cases manually.
Business Project - Transitions	RC_BP_TRANSITIONS	Set Up CRM, Common Definitions, Business Projects, Business Project, Transitions	Use this page to view the phases and tasks available in the fraud business project template.
Case - Attributes	RC_ATTR_CASE	Support, Add Case, Attributes Support, Search Case, Attributes	Use this page to view attributes associated to fraud case.

## Loading Fraud Data from an External Source

Access the Load Fraud Data page (Set Up CRM, Product Related, Communications, Load Fraud Data, Load Fraud Data).

## Load Fraud Data

Run Control ID: test
 
[Report Manager](#)
[Process Monitor](#)
Run

### File Integration Process

Enter the complete path if different from absolute path on the selected Process Scheduler Server.

\*Flat File Name

Delimiter

\* Required Field

Save
 Add
 Update/Display

### Load Fraud Data page

You can schedule the loading process to run periodically using the Process Scheduler.

<b>Run Control ID</b>	Displays the Run Control ID that you entered to access the page.
<b>Report Manager</b>	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (this message shows you a description of the report and the distribution list).
<b>Process Monitor</b>	Click to access the Process List page, where you can view the status of submitted process requests.
<b>Run</b>	Click to access the Process Scheduler Request page, where you initiate the process.
<p><b>Note.</b> You may schedule the fraud data loading process to take place periodically using the Recurrence drop-down list box in the Process Scheduler Request page.</p>	
<b>Flat File Name</b>	Enter the complete path to the CSV file where fraud data is stored.
<b>Delimiter</b>	Enter the delimiter used in the flat file. An example is " " (a pipe).

## Creating a Fraud Case

Access the Case page (Support, Add Case, Case).

CSRs can create fraud cases manually when they receive complaints from customers regarding fraudulent activities. In fact, creating a fraud case is not different than creating any support case; however in a fraud case:

- The fraud business unit is selected for the case.
- *Fraud* is selected as Case Type.
- *Fraud Team* (that is, the name of the provider group created for fraud) is used as the Provider Group.

**See Also**

*PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Managing Cases"

## Viewing Attributes Associated with a Fraud Case

Access the Case - Attributes page (Support, Add Case, Attributes).

Use the Attributes page to view attributes that are associated with *Fraud* case type.

<b>Fraud Score</b>	Display the fraud score value, which is associated to the <i>Fraud</i> case type as an attribute.
--------------------	---

**See Also**

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

## Viewing the Fraud Business Project Template

Access the Business Project - Transitions page (Set Up CRM, Common Definitions, Business Projects, Business Project, Transitions).

The screenshot displays the 'Business Project - Transitions' page for the project 'TELCO\_FRAUD\_CS'. The interface includes a navigation bar with tabs for 'Business Project', 'Transitions', 'Events', 'Invalid Actions', and 'Parent Object'. The main content area is divided into a 'Transition List' and a 'Transition Definition' panel.

**Transition List:**

- Effective Date: 01/17/2002
- \*Start Phase: Investigate Acct for Fraud
- Navigation: First, Previous, Next, Last, Left, Right
- Transition List:
  - Investigate Acct for Fraud (highlighted)
  - Fraud - Call Customer
  - Fraud - suspend letter to cust
  - Fraud - Inform credit agency
  - Fraud - Call Customer
  - Fraud - Send letter to custome
  - Fraud - Send letter to custome
  - Fraud - Suspend Service
  - Fraud - Inform credit agency
  - Fraud - Pub data to fraud DB
  - Fraud - Suspend Service
  - Fraud - suspend letter to cust

**Transition Definition:**

- \*Source Phase: Investigate Acct for Fraud
- Automatic:  (Unselected)
- Manual:  (Selected)
- \*Target Phase: Fraud - Call Customer
- Default Target Phase
- Automatic transition when -
  - All tasks completed successfully
  - All tasks completed, but one failed
  - Any task fails and no task completed
  - The tasks do not complete in time
- Buttons: Validate, Validated (checked)

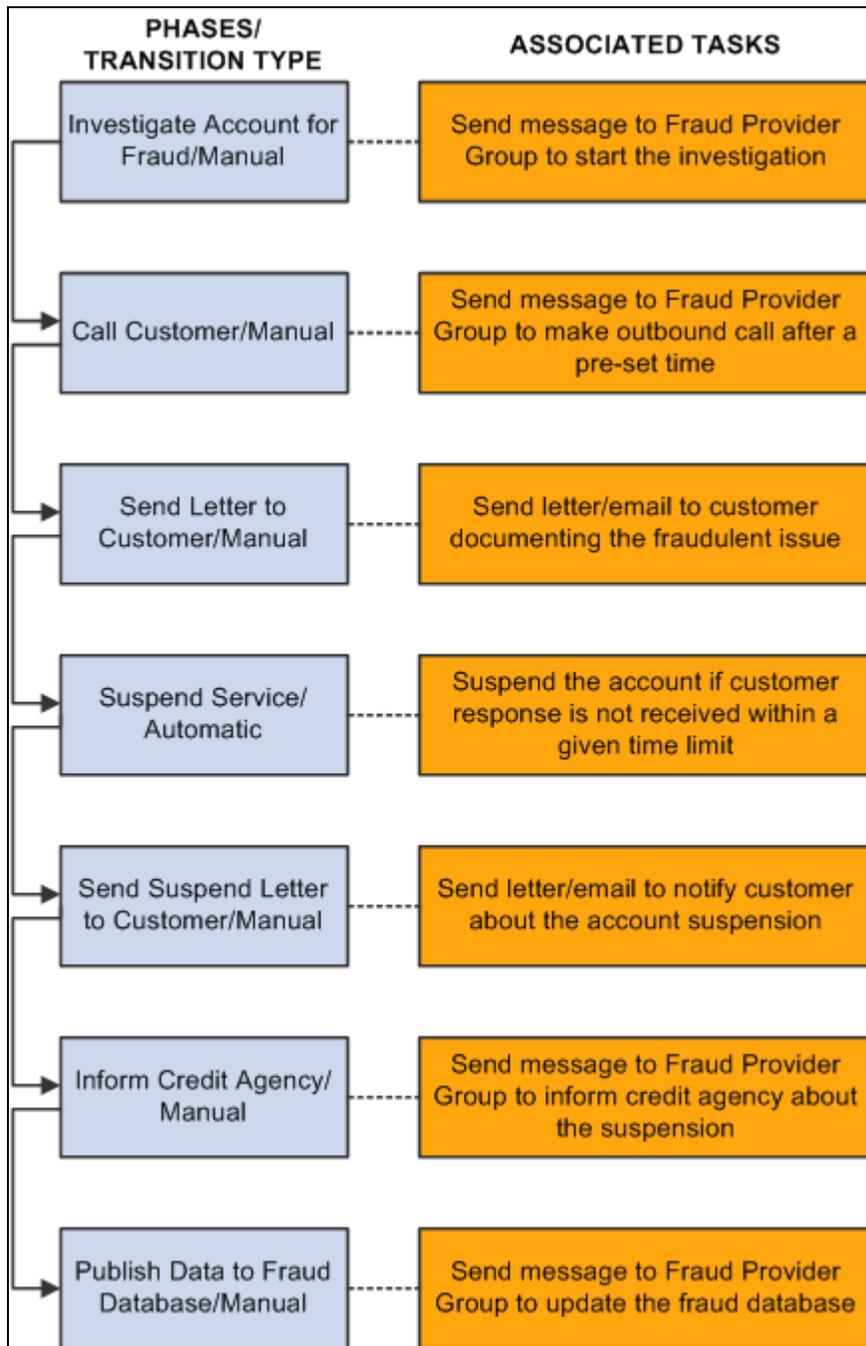
### Business Project - Transitions page

PeopleSoft provides a business project template *TELCO\_FRAUD\_CS* for fraud that can be leveraged by customers in their business process to coordinate and track work involved in handling fraud cases. The CSR can invoke the business project manually and view its status in the Related Objects page of the fraud case.

Use the Business Project - Transitions page to view the list of phases available in the fraud business project.

The *TELCO\_FRAUD\_CS* business project consists of six phases, starting with fraud account investigation. In this business project, the phase transition is mainly a manual process, except for the *Suspend Service* phase in which the task automatically changes the fraud account status to "hold."

The following diagram illustrates the fraud business project phases and the tasks associated with each phase:



Fraud business project phases and tasks

**See Also**

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Setting Up Business Projects"

## Chapter 11

# Understanding Business Projects for Communications

This chapter provides an overview of business projects for communications and discusses:

- New Order business project.
- Change Service business project.
- Suspend Service business project.
- Disconnect Service business project.
- Resume Service business project.
- Fraud business project.

---

**Note.** Beginning with release 9.0, BPEL processes are provided for the above functionality. The new functionality is added to the BPEL process and not available in the existing Business Projects. Also, the 'Change Feature' and 'Change Attribute' actions are merged into a 'Change' action, which uses a BPEL process.

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## Understanding Business Projects

Business projects are structured, workflow-enabled task lists. You use business projects to coordinate and track the work involved in performing tasks. Business projects:

- Codify the best practices of your organization into a reusable template.
- Enforce the proper sequence of tasks.
- Automate the delivery of status-based notifications.

Communications business processes are supported by business project workflow templates:

- New order.
- Change service.
- Suspend service.
- Disconnect service.
- Resume service.

- Fraud.

**See Also**

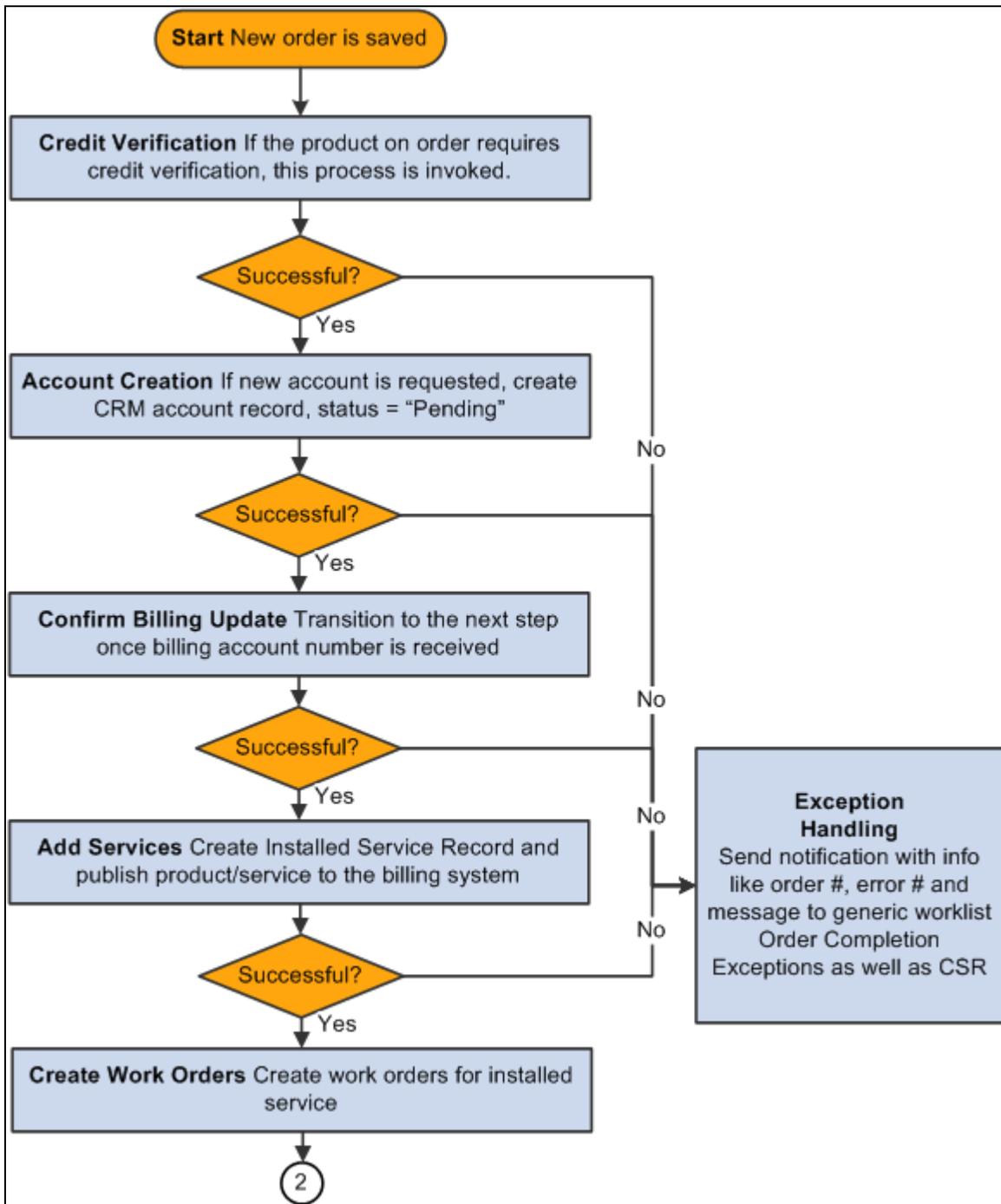
*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Setting Up Business Projects"

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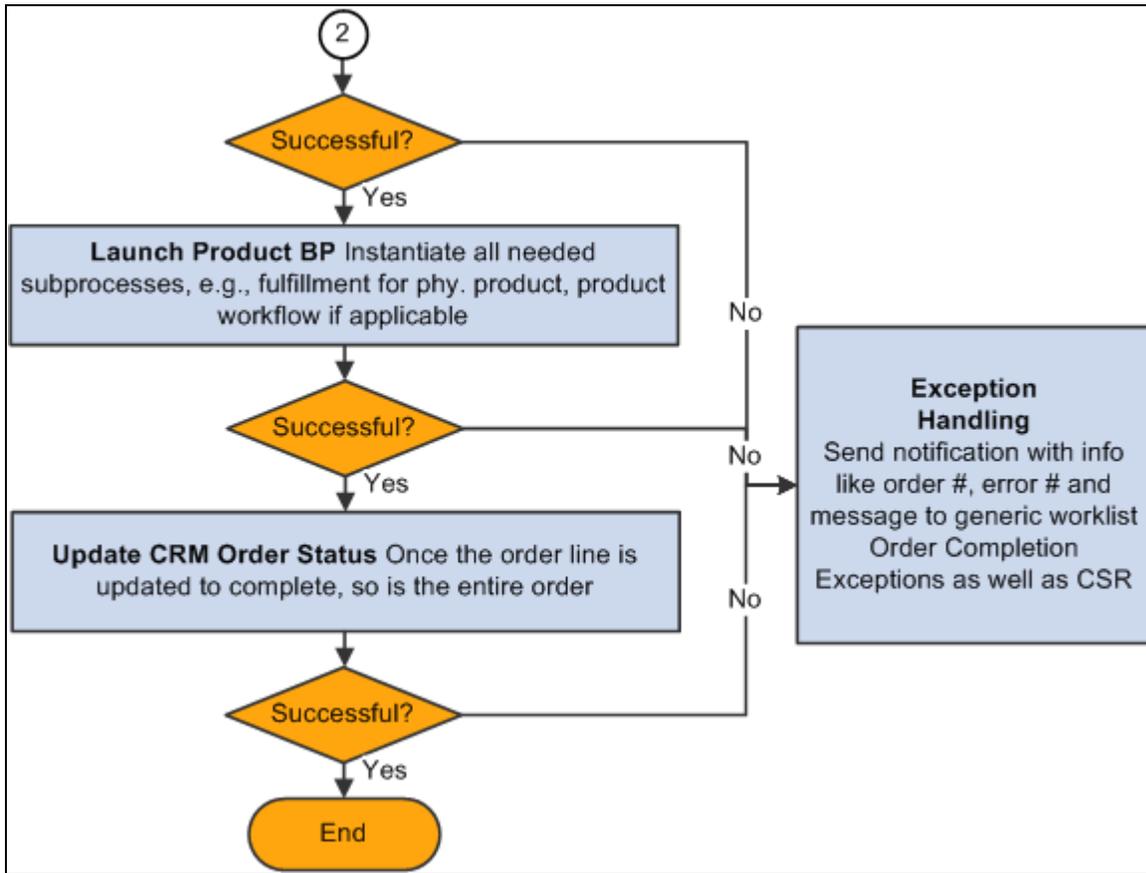
## New Order Business Project

The delivered template for the new order business project is TELCO\_NEW\_ORDER.

This diagram shows the new order business project flow, during which the customer's credit is verified, billing information is set up, services are ordered, and the proper work orders and business processes are set up to provide the requested services and update the database.



New order business project (1 of 2)



New order business project (2 of 2)

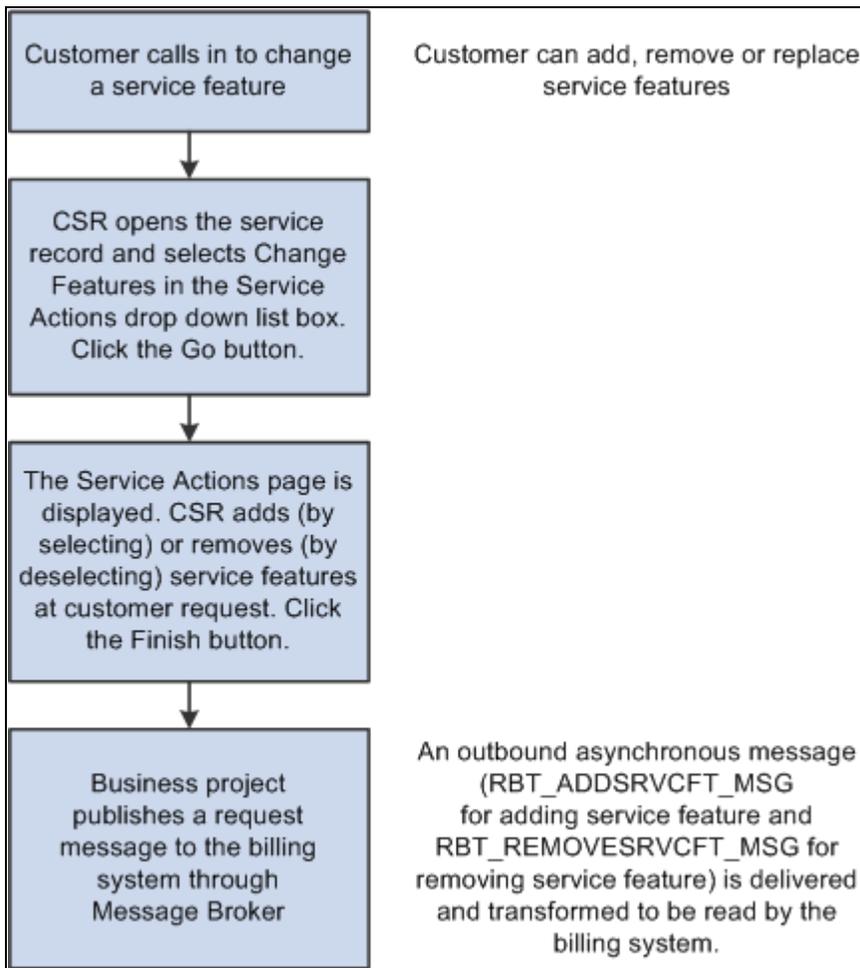
**See Also**

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

## Change Service Business Project

The delivered template for the change service business project is TELCO\_CHGSVC.

The diagram shows the change service business project, during which customers can change service features for their accounts:



Change service business project

### See Also

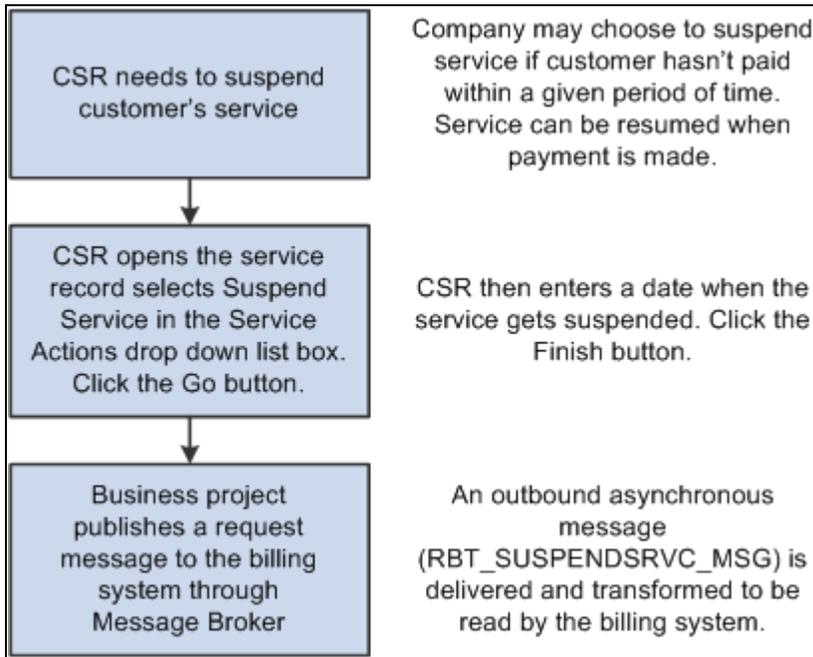
*PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working with PeopleSoft Service Management"

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## Suspend Service Business Project

The delivered template for the suspend service business project is TELCO\_SUSPEND.

The diagram shows the suspend service business project:



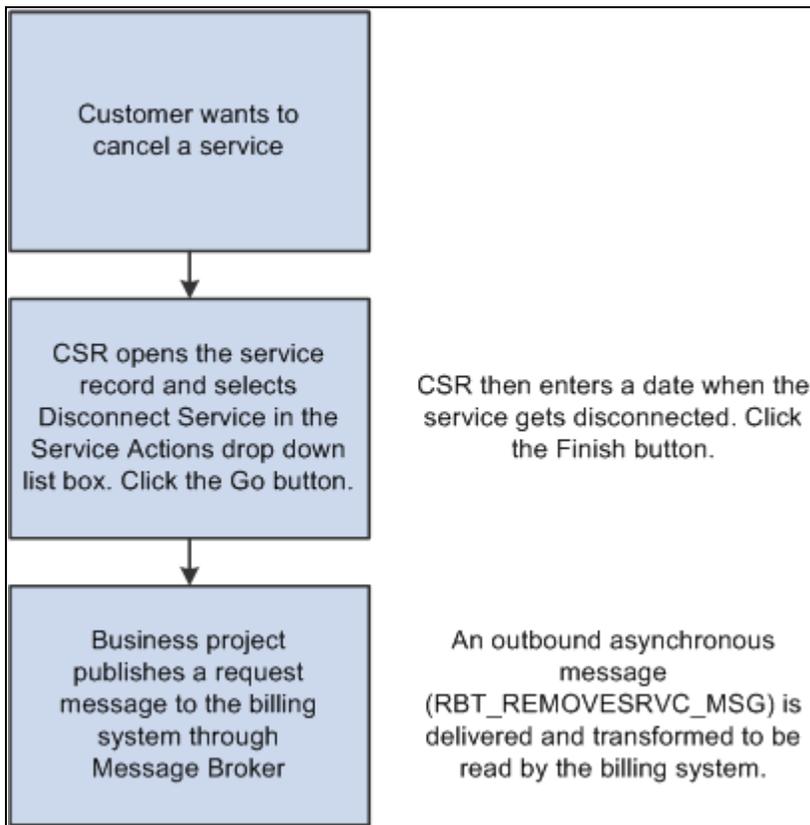
Suspend service business project

---

## Disconnect Service Business Project

The delivered template for the disconnect service business project is TELCO\_DISCONN.

The diagram shows the disconnect service business project:



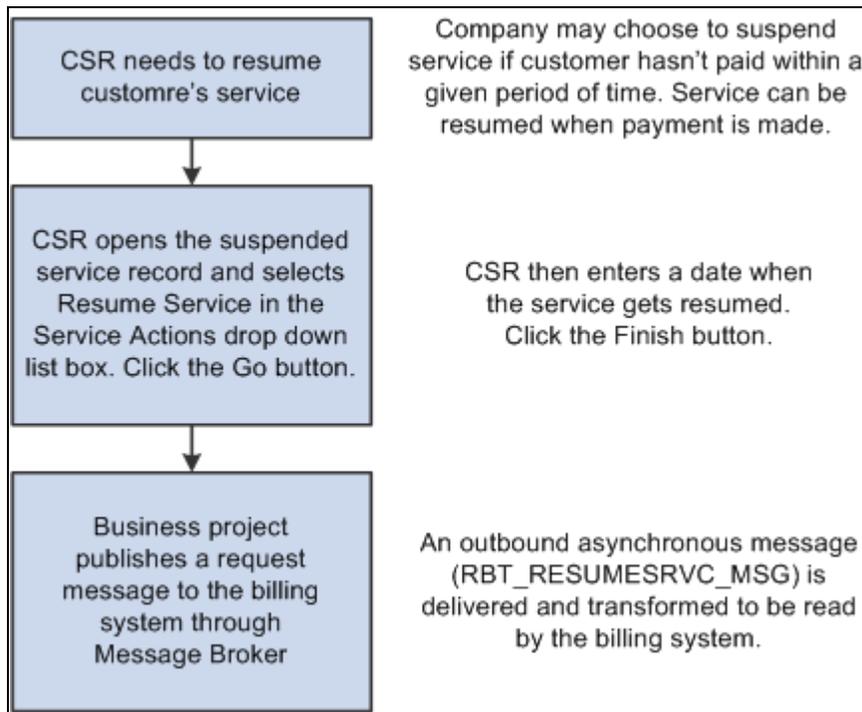
Disconnect service business project

---

## Resume Service Business Project

The delivered template for the resume service business project is `TELCO_RESUME`.

The diagram shows the resume service business project:



Resume service business project

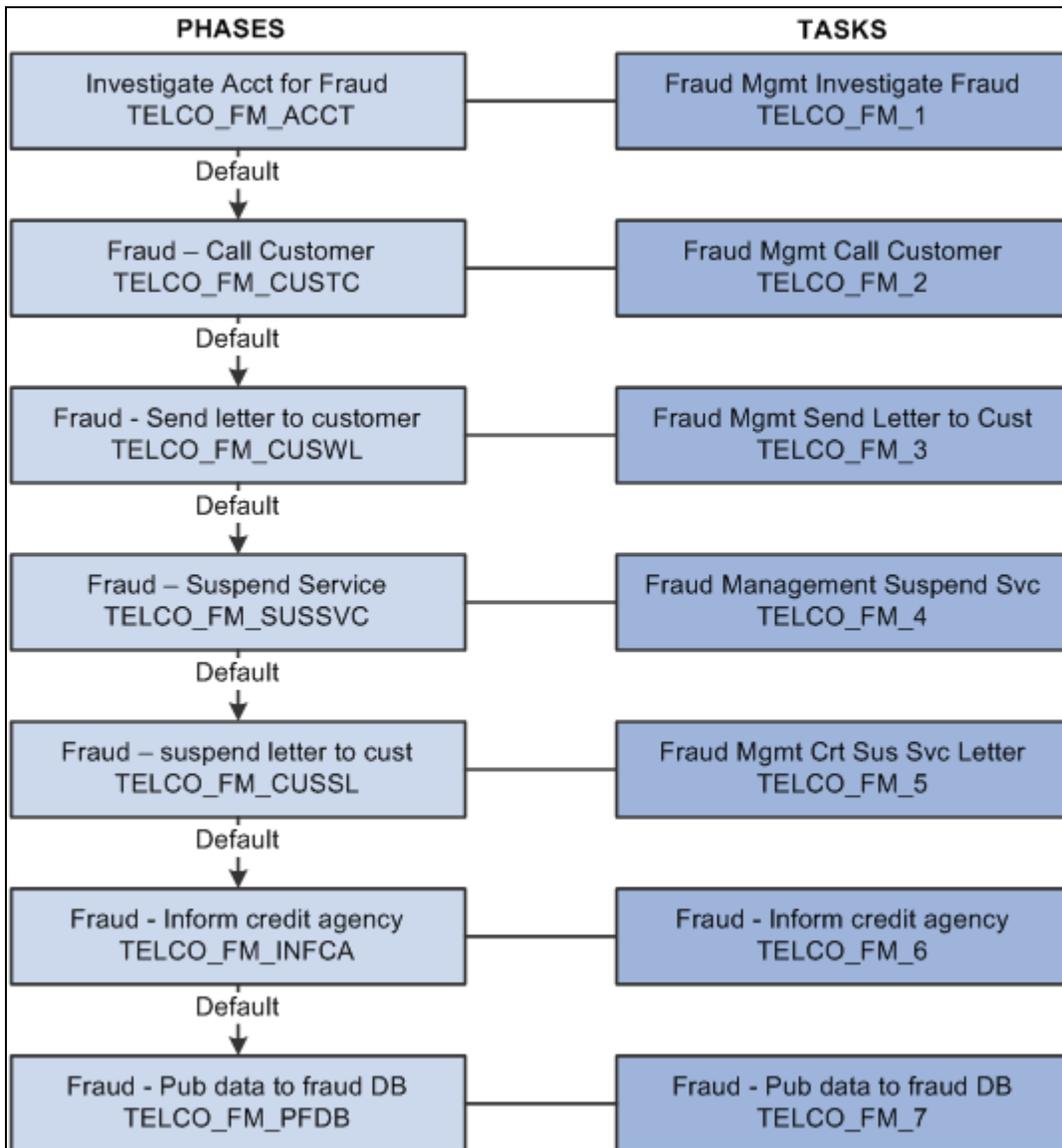
**See Also**

*PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management"*

## Fraud Business Project

The delivered template for the fraud business project is TELCO\_FRAUD.

The diagram shows the fraud business project, including the phases of the fraud investigation and the tasks associated with each phase:



Fraud business project

---

**Note.** The fraud business project used by communications is instantiated when a case with the type of *Fraud* is submitted. This functionality relies on call center events for business projects, which are delivered as disabled. To enable the fraud business project, the call center events must be enabled at setup.

---

**See Also**

[Chapter 10, "Working with Fraud Management," Setting up Fraud Management, page 91](#)



## Chapter 12

# Understanding Business Projects for Energy

This chapter provides an overview of business projects for energy and discusses:

- Start service.
- Stop service.
- Transfer service.

---

## Understanding Business Projects

Business projects are structured, workflow-enabled task lists. You use business projects to coordinate and track the work involved in performing tasks. Business projects:

- Codify the best practices of your organization into a reusable template.
- Enforce the proper sequence of tasks.
- Automate the delivery of status-based notifications.

Energy business processes are supported by business project workflow templates:

- Start service.
- Stop service.
- Transfer service.

### **See Also**

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Setting Up Business Projects"

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Using Business Projects"

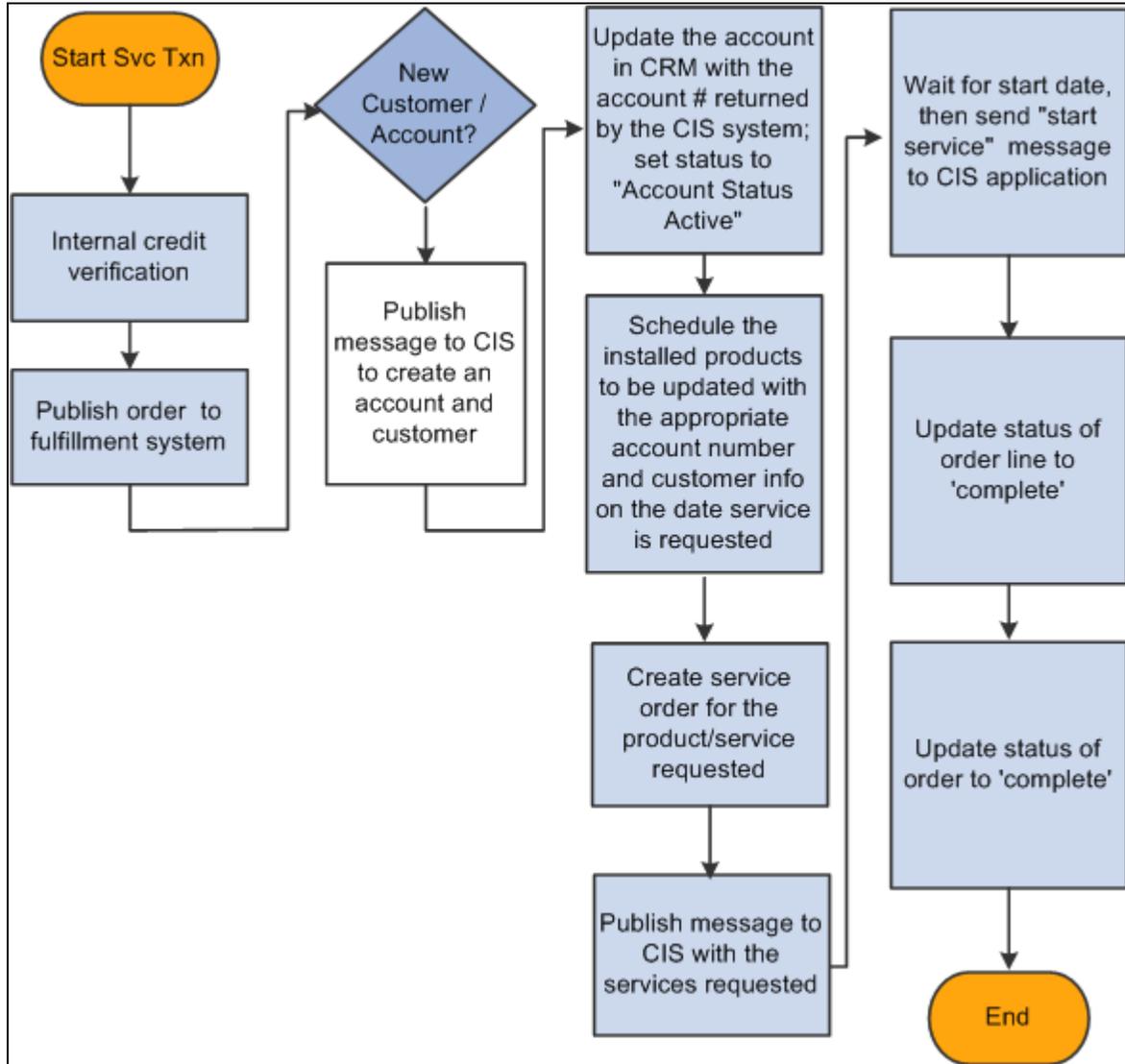
*PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working with PeopleSoft Service Management," Managing Services

*PeopleTools 8.52: PeopleSoft Integration Broker PeopleBook*

## Start Service Business Project

The delivered template for the Start Service Business Project is ENRGY\_START\_SVC.

The following diagram shows the process flow of the Start Service transaction, showing the steps that the system takes during each phase of the process from credit verification through completion of the order.



Start Service business project

### ***Related Tasks for the Start Service Business Project***

The following tasks are associated with the Start Service business project:

- Phase 1 – Internal Credit Verification

Task – Internal Credit Verification for the customer.

- Phase 2 – Publish order to fulfillment system.  
Task – Publish discreet products (if any) to the fulfillment system.
- Phase 3 – Create accounts in CRM and Billing.
  - Task 1 – Create relationship between site and new customer (sold to customer) and expire the relationship of the existing customer and site based on the Start Service Date.
  - Task 2 – Create account in CRM, if required.
  - Task 3 – Create customer and account in CIS, if required.
- Phase 4 – Check if CRM account updated with CIS account number.  
Task – Verify if CRM account record updated by CIS account information.
- Phase 5 – Update installed product with customer account number.  
Task – Update installed product with account number of new customer.
- Phase 6 – Create work order.  
Task – Create work order in Field Service.
- Phase 7 – Publish activate service message to CIS system.  
Task – Publish activate service message to CIS system.
- Phase 8 – Update Order Line and Order Status.
  - Task 1 – Update Order Line.
  - Task 2 – Update Order Status.

### **See Also**

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Using Business Projects"*

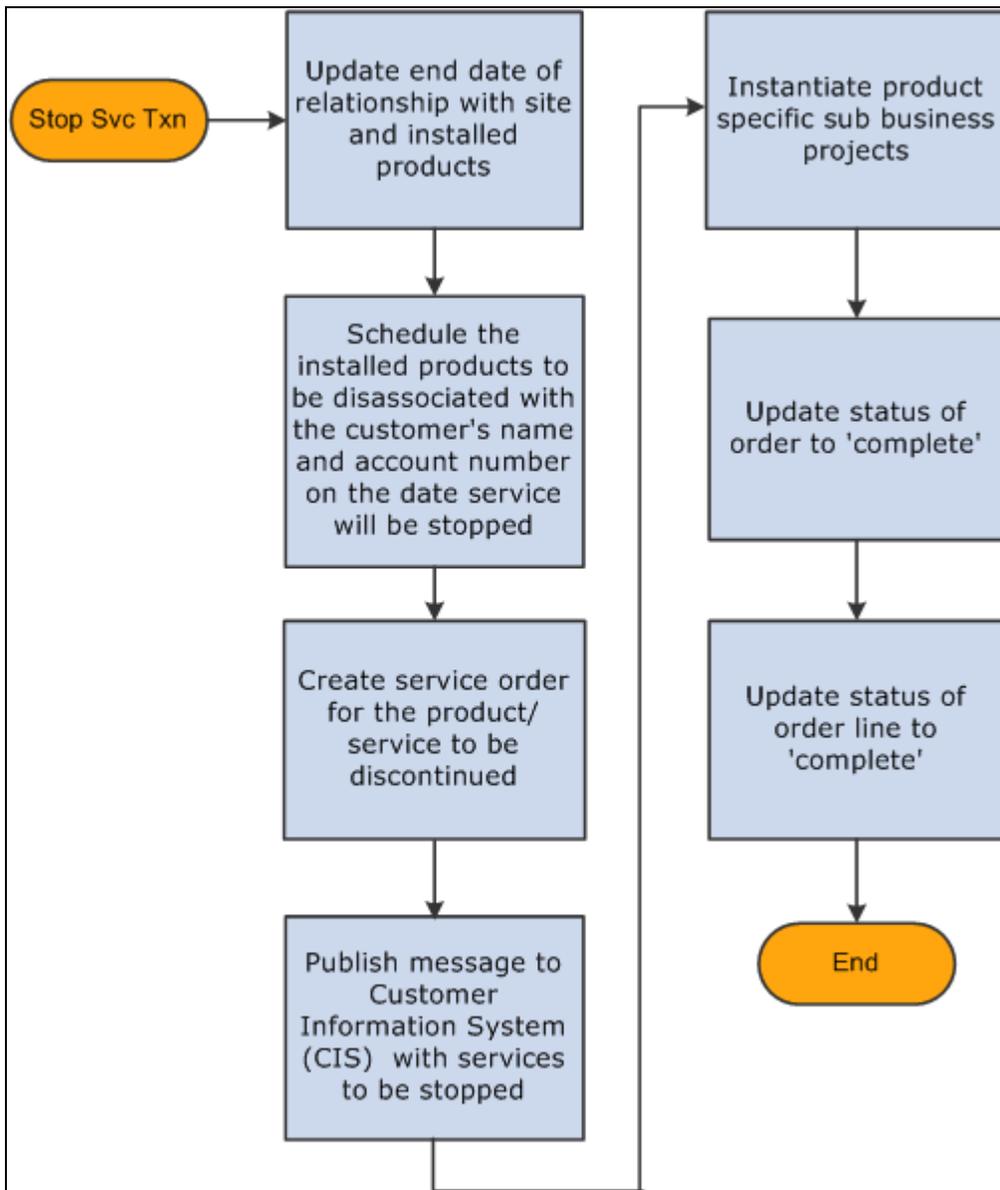
*PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management," Managing Services*

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## **Stop Service Business Project**

The delivered template for the Stop Service Business Project is ENRGY\_STOP\_SVC.

The following diagram shows the process flow of the Stop Service transaction, showing the steps that the system takes during the process of stopping a customer's service from the initial request through process completion.



Process flow of the Stop Service transaction

**Related Tasks for the Stop Service Business Project**

The following tasks are associated with the Stop Service business project:

- Phase 1 – Expire relationships.
  - Task 1 – Update end date of relationship between Site and Customer.
  - Task 2 – Disassociate customer account with installed product and update end date on account information.

- Phase 2 – Create work order.

Task – Create work order in Field Service.

- Phase 3 – Instantiate product - specific sub business projects (if any).

Task – Instantiate product - specific business projects.

- Phase 4 – Publish deactivate service message to CIS system.

Task – Publish deactivate service message to CIS system

- Phase 5 – Update Order Line and Order Status.

- Task 1 – Update Order Line.

- Task 2 – Update Order Status.

### **See Also**

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Using Business Projects"*

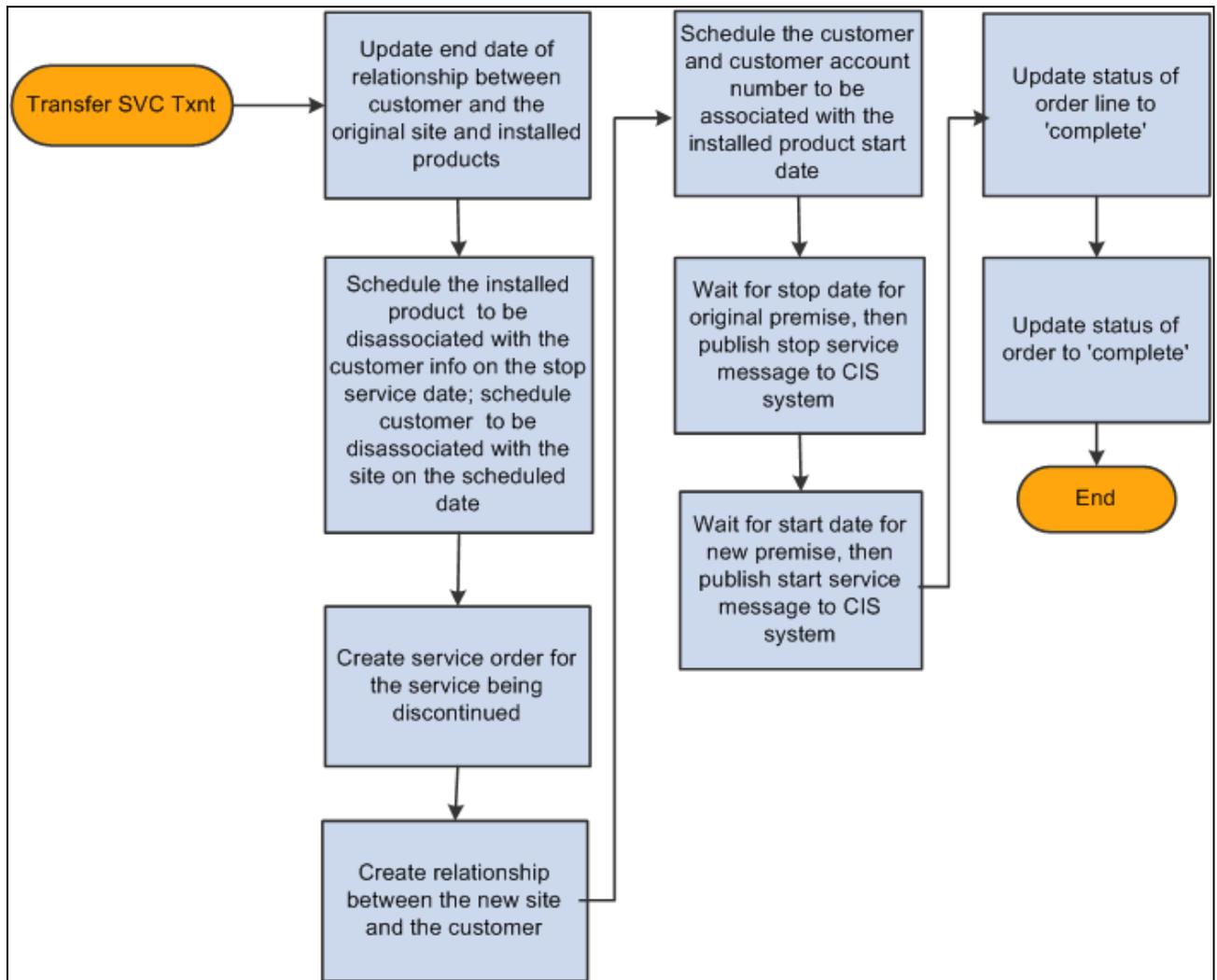
*PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management," Managing Services*

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## **Transfer Service Business Project**

The delivered template for the Transfer Service Business Project is ENRGY\_TRSFR\_SVC.

The following diagram shows the process flow of the Transfer Service transaction, during which a customer's service is transferred from one location to another.



Transfer Service business project

### ***Related Tasks for the Transfer Service Business Project***

The following tasks are associated with the Transfer Service business project:

- Phase 1 – Internal Credit Verification
  - Task – Internal Credit Verification for the customer.
- Phase 2 – Publish order to fulfillment system.
  - Task – Publish discreet products (if any) to fulfillment system.
- Phase 3 – Expire existing relationships.
  - Task 1 – Expire relationships between existing Site and Customer (Sold To – Customer), and expire the relationship of the existing customer and site based on Start Service Date.
  - Task 2 – Disassociate customer account from the existing installed product.

- Phase 4 – Create work order.

Task – Create work order for the requested product/service.

- Phase 5 – Establish new relationships.

- Task 1– Create relationship between new site and customer (Sold To – Customer) and expire the relationship of the existing customer and site based on Start Service Date.

- Task 2 – Associate customer account from the existing installed product.

- Phase 6 – Create work order.

Task – Create work order for the requested product/service.

- Phase 7 – Instantiate product - specific sub business project.

Task – Instantiate product - specific sub business project.

- Phase 8 – Publish service message to CIS system.

- Task 1– Publish de - activate service message to CIS system.

- Task 2 – Publish activate service message to CIS system.

- Phase 9 – Update Order Line and Order Status.

- Task 1 – Update Order Line.

- Task 2 – Update Order Status.

### **See Also**

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Using Business Projects"

*PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working with PeopleSoft Service Management," Managing Services



## Chapter 13

# Understanding Products and Services for Communications and Energy

This chapter discusses:

- The product model for communications.
- Service management for communications.
- Installed service for communications.
- Service management for energy.

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## Product Model for Communications

This section discusses:

- Product model.
- Product packages.
- Product catalog.
- Product actions.
- Product attributes.

## Product Model

PeopleSoft CRM enables you to rapidly deploy new offerings (services and products) through multiple delivery channels.

The product data model enables you to model physical products, services, and service features. You can define physical products separately from services or service features. This allows you to address services differently from physical goods—phone service is not shipped out of a warehouse, while cellular phones are.

Although these are all products, the application functionality for each is slightly different.

- Physical Product

Physical products, such as cell phones, can be shipped out of the warehouse. Physical products are commonly integrated with the PeopleSoft Supply Chain Management application.

- Service

Services are the base service products that a customer can buy, such as wireless or DSL. Service products are non-stockable and intangible services.

- Service feature

Service features are the features that change, enhance, or allow billing for a service. For example, voicemail, caller IDs, or rate plans.

### **See Also**

*PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Understanding Products and Items in PeopleSoft CRM"

## **Product Packages**

Multi-level product packages allow you to bundle multiple services into a package, or even to bundle multiple packages together into a new package. These packages can be used to quickly define new offerings, using existing services and packages. Minimum and maximum quantities are set up at both the overall package level, and at the package component level to provide enforceable configuration rules. For example, a package of wireless service features could require that at least two features are selected when buying the product.

### **See Also**

*PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Setting Up Products," Defining Product Packages

## **Product Catalog**

The product catalog is a rules and presentation layer on top of the product master that arranges and targets products at the appropriate users. For example, if a CSP only offers DSL service in a particular geography, the catalog can be used to ensure that users from other areas are not offered the service. The product catalog, along with the configurable Product Advisor also provides product selection functionality to ensure the customer orders the appropriate products/services.

PeopleSoft uses the product ID as a primary search key for the Product Master table. Once you have defined a product ID, use the lookup button for the Product ID field to access it on other pages in your system.

### **See Also**

*PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Creating Catalogs"

## **Product Actions**

Product actions are rules associated at the product level that can be used by different application components.

You can define product action rules, which will be employed regardless of the channel a customer uses to purchase the application. For example, you can define a rule that tells the application that one service can be disconnected, while another cannot. Actions can also be used to indicate whether a credit check is required for specific products—contract wireless service requires a credit check but ordering prepaid service does not. You set up product actions once when the product is established on the system, and then it is available for ordering through the Order Capture and Service Management functions. The rules are used consistently during the Order Management function as the service is activated.

Actions include:

- Service management actions that determine if a service or service feature can be cancelled, added, suspended, and so on.
- Pre-order qualification actions determine if there are required checks, such as a credit check, that need to be performed during the order.
- Business project actions can be used to tailor the workflow for the specific products on the order.

Alternately, a BPEL process can be used to tailor the workflow for the specific products on the Order.

For example:

For a parent product such as Wireless Service, the list of Service Management related actions (Action Type = Service Management) could be *Disconnect*, *Suspend*, *Change* and *Resume*. It means that you cannot replace Wireless Service with some other service. You can only disconnect, suspend, change or resume Wireless Service.

<b>Parent Product</b>	<b>Action Type</b>	<b>Action</b>
Wireless Service	Service Management	Disconnect
Wireless Service	Service Management	Suspend
Wireless Service	Service Management	Resume
Wireless Service	Service Management	Change

For a service feature product such as Caller ID, the following could be the possible actions:

<b>Parent Product</b>	<b>Action Type</b>	<b>Action</b>
Caller ID	Pre-Order Qualification	CO Distance Test
Caller ID	Service Management	Add
Caller ID	Business Projects	Perform Loop Test

<b>Parent Product</b>	<b>Action Type</b>	<b>Action</b>
Caller ID	BPEL	Perform Loop Test

For a service feature product such as 200 Any Time Minutes, the following could be the possible actions:

<b>Parent Product</b>	<b>Action Type</b>	<b>Action</b>
Any Time Minutes	Service Management	Add
Weekend Minutes	Service Management	Add
Weekend Minutes	Service Management	Remove

When a package is listed as a service feature for a service, the rules (minimum, maximum, and so on) associated with that package are enforced. For example, if anytime minutes is a package that has a minimum and maximum that equals 1, then the customer can only replace a feature that already exists.

### **See Also**

*PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Setting Up Products," Defining Products

## **Product Attributes**

Attributes enable you to define and track any data associated to business objects without adding fields to the base table. For example, you may want to track phone color. Without using attributes you would need a separate field on the product table to track allowable phone colors as well as customizations to ensure that the correct information is collected and presented to the user for the appropriate product.

Product attributes are very important for companies that offer diverse products. They are also important if downstream applications require specific data to activate service. Attributes allow you to define new, unique products, capture the relevant data associated with those products, and ensure that relevant data is captured during the order capture process. For example an email product requires a user ID and password to be captured. Talk time is important information to display for wireless phones.

You can create and associate attributes for each service offering through business rules. For example, when offering email (the service) it is necessary to capture a user ID (attribute), but not a phone number (attribute). When offering cellular service (the service), it is critical to capture a phone number (attribute), but not a user ID (attribute). You can define the attributes necessary for any service offering.

Attributes can either describe the product in further detail (cell phone display size or talk time), or can be defined as configuration attributes which require the user to capture these values during the order process (IP address when selling DSL service).

Rules based attributes display and capture two types of product-specific information:

- Informational

Users can define new data fields to gather information about specific problems. A Product Data Sheet can be assembled easily with the help of informational attributes. Customer facing, as well as agent facing, Order Capture applications leverage the informational product attributes to construct the product data sheet. In addition, product attributes can be leveraged by the product comparison functionality built into the catalog. In this example, the "Talk Time" of two different models can be compared.

- Configurable

Configurable attributes collect data that must be captured when the order is taken, such as the user ID and password for email. These are specific data elements associated with products. Configurable attributes can also be used to capture product specific information during case creation to diagnose a problem.

### **See Also**

*PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Setting Up Products," Defining Products

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## **Service Management for Communications**

The service management functionality provides the interface for the customer service representative (CSR) as well as the self-service user to initiate changes such as addition, replacement, or removal of features to an existing service. It also provides the interface to perform changes at the service level, such as disconnect service, suspend, and resume service.

Service management provides the infrastructure to flow the submitted orders through to the appropriate operations support system applications for provisioning and activation using product actions and product-specific business projects.

Product actions determine what actions are allowable for specific services and service features. Product service feature relationships provide valid features that can be added to an existing service.

When a customer initially orders service, the service and service features are created in a n-tier hierarchy in the Installed Products component. Service Management is the component that is used to change those features associated with an installed service.

Once service has been established, there are several typical transactions and business processes required to manage that service. Service management involves the following service actions:

<b>Service Change</b>	<b>Definition</b>	<b>Example</b>
Change Service	An order that changes the features associated with a pre-existing service. This order can be used to add, replace, or remove service features. . This Service can be used to change phone numbers and attributes.	Existing wireless customer wants to replace a 500 minute plan with 1000 minute plan. He also wants to cancel the call forwarding feature which he never uses.  See and <i>PeopleSoft CRM 9.1 Order Capture Applications PeopleBook</i> , "Order Capture Delivered Business Processes and Web Services," Change Service Process Flow.
Disconnect Service	An order that cancels a pre-existing service. All features related to the service are also canceled. Service features cannot be disconnected by themselves.	Customer wants to switch service providers. He calls to cancel existing service.  See and <i>PeopleSoft CRM 9.1 Order Capture Applications PeopleBook</i> , "Order Capture Delivered Business Processes and Web Services," Service Management Disconnect Service Process Flow.
Suspend Service	An order that changes the status of a pre-existing service to <i>Suspended</i> . Service features cannot be suspended.	Customer is going away for a long vacation and wants to suspend the service.  See and <i>PeopleSoft CRM 9.1 Order Capture Applications PeopleBook</i> , "Order Capture Delivered Business Processes and Web Services," Service Management Suspend Service Process Flow.
Resume Service	An order that returns the status of an existing service to <i>Active</i> . Resuming service is accomplished by entering an End Date in the Suspend Service line detail.	Customer returns from vacation and wants the service resumed.  See and <i>PeopleSoft CRM 9.1 Order Capture Applications PeopleBook</i> , "Order Capture Delivered Business Processes and Web Services," Service Management Resume Service Process Flow.

**See Also**

*PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Working with PeopleSoft Service Management"

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## Installed Service for Communications

Installed service functionality used for the communications industry is based on the core Installed Product component. In this section, the discussion will focus on communications-specific functionality.

Installed service records are used to track products and services that are installed at a customer's site.

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**Note.** Installed Product is referred to as Installed Service for the communications industry.

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PeopleSoft Order Capture automatically creates an installed service record when the order capture process takes place, using the TELCO\_NEW\_ORDER business project template or the BPEL process delivered for communications. Similarly, installed service records are updated automatically after requests such as disconnect service or change service have been entered through the Service Management component.

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**Note.** You can create installed service records manually. However, it is highly recommended that you let the system do it for you, using a business project. This takes advantage of the benefits and functionality offered for the communications industry.

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See *and PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Order Capture Delivered Business Processes and Web Services," Communications New Order Process Flow.

Installed Service records display account information captured during the order capture process and pricing information—unit price and nonrecurring—used for the installed services. You can also view product attributes in the records, if attributes have been specified to display in the Installed Service component.

A customer can have one or multiple accounts; each account can be associated with one or multiple installed services.

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## Service Management for the Energy Industry

This section discusses:

- Service management for the energy industries.
- The Start Service transaction.
- The Stop Service transaction.
- The Transfer Service transaction.

## Service Management for the Energy Industry

In PeopleSoft CRM for the energy industry, service request transactions are essentially PeopleSoft Order Capture types associated with Start Service, Stop Service, and Transfer Service. Each of these capture types have predefined templates delivered as system data. These templates are tailored for the utilities and energy industry. You can also define additional templates or modify existing ones.

The templates are:

- The Start Service template (ENRGY\_START\_SVC) captures new service requests for energy services.
- The Stop Service template (ENRGY\_STOP\_SVC) captures stop service requests for energy services.
- The Transfer Service template (ENRGY\_TRSFR\_SVC) captures transfer of service requests for energy services.

Each template is associated with an entry form that the customer service representative (CSR) can access from Service Management. When requesting service for a site, the customer selects the service based on the installed products available at that site.

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**Note.** In the CRM solution for energy, a site is synonymous to a premise.

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This section focuses on the service request transactions specific to the energy solution. This section does not address all the aspects of the Order Capture functionality nor the creation of the configurable templates through the template workbench. Therefore, it is recommended that you review the following references before you work with service request transactions.

The following references provide information about Order Capture functionality:

See *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Getting Started with PeopleSoft CRM Order Capture Applications." and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Defining Order Capture Business Units." and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Managing Orders and Quotes." and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "Setting Up PeopleSoft Order Capture."

### **See Also**

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

*PeopleSoft Bill Presentment and Account Management 9.1 PeopleBook*, "Setting Up Billing Integration for the Communication and Energy Industries"

*PeopleTools 8.52: PeopleSoft Integration Broker PeopleBook*

## **The Start Service Transaction**

You use the Start Service transaction to initiate service for a new or existing customer at a new premise where the services have already been established. When a customer moves into a location, the transaction associates the customer with the existing site and the installed products at that site.

Customer service representatives (CSRs) use the Start Service transaction to:

- Capture the premise/site that the customer is moving into.
- Display the services available at the site.
- Capture the start date of the service.
- Capture service attributes.

## The Stop Service Transaction

You use the Stop Service transaction to discontinue service at a premise.

CSRs use the Stop Service transaction to:

- Select customer account and site information.
- Select the services to terminate.
- Capture the end date of the service.

## The Transfer Service Transaction

You use the Transfer Service transaction to transfer the association of services between premises. While the services are not physically transferred to another premise, you simply associate the very same service to a different customer or site. To initiate the transfer, the CSR must select a site that the services are being transferred, the start service date of the new premise, and the stop service date of the old premise.

The Transfer Service transaction enables the CSR to:

- Capture the existing premise/site from which the customer wants to transfer the service.
- Capture the new premise/site to which the customer wants to transfer the service.
- Display the installed services available at the new premise.
- Capture the stop date of the old service.
- Capture the start date of the new service.



## Chapter 14

# Working with Products in Financial Services and Insurance

This chapter provides an overview of products for the financial service and insurance industries, and discusses how to:

- Set up and maintain product groups.
- Define products and product packages.
- Define product relationships.
- Set up actions for insurance.

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## Understanding Products in the Financial Service and Insurance Industries

In this section, we discuss:

- Insurance products.
- Financial services products.
- Product attachments.
- Product relationships.
- Attributes
- Actions

## Insurance Products

Insurance products—whether life, health, or Property and Casualty (P&C)—are essentially a collection of available coverages. Coverages are specific to the line of business; however, specific coverages may appear in multiple products. Using the PeopleSoft Customer Relationship Management (PeopleSoft CRM) for Insurance product model, you set up coverages as individual products and group them in packages. The product model uses products as the basic building blocks that you use to create policies that are offered to your customers. Products can be coverages, benefits, riders, exclusions, and so on—any basic component of an insurance policy. Setting up coverages separately enables you to easily change the configuration of products to meet market needs. In addition, it provides the flexibility to meet regional and legislative requirements.

This table lists details about the terminology used for insurance products:

<b>Term</b>	<b>Details</b>
Product	Each product is a coverage, a benefit, a rider, or an exclusion. For example, collision coverage, loss of use, or covered property would each be set up as a product. Coverages are grouped together in a product package to create an insurance policy. Coverages can be used once or for multiple policies. You can assign a code to each coverage to facilitate searching.
Product group	A product group organizes your coverages into manageable groups for retrieval purposes. For Property and Casualty, there are more than 1,200 coverage codes that you can group. The coverages are organized into about 100 groups from Property and Casualty ACORD standard data.
Product package	Packages assemble coverages into a policy that your company can offer to a customer. For example, a package can be a homeowners policy, a personal auto policy, or a term life policy. Each package is an accumulation of products. You must have a minimum of two products to create a package.
Arrangement	A product arrangement is composed of a single product or product package with enhanced features that is made available to organizations, not individual consumers. An organization can be a company, a partnership, or an alternate capacity. For example, an insurance company may offer a preferred rate on automobile policies sold to employees of a company.

<b>Term</b>	<b>Details</b>
Contract	A contract is an agreement between the insurance company and a specific organization that includes a specific product. In contrast to an arrangement, a contract is tied to one organization and is specific to that organization.
Product relationship	A product relationship links one product to another in a specific relationship. Product relationships can define alternate products, complementary products, cross-sells, prerequisites, replacements, service features, and upsells.

## Financial Services Products

This table lists details about the terminology used for financial services products:

<b>Term</b>	<b>Details</b>
Product	A product can also be known as a single product or base product. This is the product that a financial institution sells to a business contact. A product could be a regular savings account, a certificate of deposit, automobile insurance, or a credit card.
Product group	A product group is a collection of related financial services products. For example, the Checking product group could consist of regular checking, premium interest checking, student checking, and business checking.
Product package	A package consists of two or more base products that may not be related, but are grouped together for sales or marketing purposes. A Senior Banking package might consist of a premium interest checking account, an ATM card, and a credit card, as well as preferred rate auto and home insurance. A product package can include another product package.
Arrangement	A product arrangement is composed of a single product or product package with enhanced features that is made available to organizations, not individual consumers. An organization can be a company, a partnership, or an alternate capacity. For example, a bank may offer a preferred rate of interest on a savings account to employees of the company.

<b>Term</b>	<b>Details</b>
Contract	A contract is an agreement between the financial institution and a specific organization that includes a specific product. In contrast to an arrangement, a contract is tied to one organization and is specific to that organization.
Product relationship	A product relationship links one product to another in a specific relationship. Product relationships can define alternate products, complementary products, cross-sells, prerequisites, replacements, service features, and upsells.

## Product Attachments

Financial services organizations need to associate documents to products. Federal regulations require that banks ask customers that they understand the terms and conditions of products and that they agree to them. In internet product sales, attachments of the *Disclosure* type appear when a customer is applying for a product. The attachments are stored on a File Transfer Protocol (FTP) server.

You may need to associate disclosure or prospectus documents with certain insurance products. In the Internet product sales process, attachments of the type *Disclosure* or *Prospectus* can be displayed when a customer is applying for a product. The attachments are stored on a File Transfer Protocol server.

When you add an attachment to a component, you identify the file to be attached. Once you identify the file, the system uploads the attachment to your PeopleSoft attachment server. Storing all attachments on a central server ensures that the attachment is available to all users.

When you click the link for an existing attachment, the system launches the attachment. The system handles the file according to your operating system's rules, either opening the file in a new browser window, prompting you for a location to download the file, or offering you a choice between these two actions.

To support attachments, set up an FTP server to store attachments and configure the system to access the server. To configure the system, use the URL Maintenance page to specify a URL for each component that supports attachments. This setup is part of the PeopleSoft CRM installation process.

## Product Relationships

A product relationship links one product to another in a specific relationship. You can define these relationships:

<b>Relationship</b>	<b>Usage</b>
Alternate products	Products that could replace the original product.
Complementary products	Products that complement the original product.

<b>Relationship</b>	<b>Usage</b>
Cross-sells	Products or services that are complementary to those that the customer already has or intends to buy.
Prerequisites	Products that should be purchased prior to the purchase of the product.
Replacements	Products that can replace the original product.
Service features	Service features that can be sold in conjunction with the product.
Upsells	Products or services that are of higher value or more expensive than those the customer already has or intends to buy.

### **See Also**

*PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Setting Up Products," Managing Product Relationships

## **Attributes**

This section discusses:

- Attributes used in financial service industries.
- Attributes used for insurance industries.

### **Attributes for Financial Services**

PeopleSoft for financial services uses the core PeopleSoft CRM attribute functionality. Attributes can be assigned at the individual product or product group level. PeopleSoft delivers three attributes specifically designed for products in the financial market:

- Features

Features describe product characteristics. Examples include overdraft protection or simple interest.

- Terms and Conditions

This attribute displays conditions and details for the product or product group.

- Services

This attribute displays the services provided with the product.

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**Note.** Your organization can add attributes in addition to those supplied by PeopleSoft.

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See *and PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Setting Up Products," Defining Product Attributes.

### **Attributes for Insurance**

Insurance uses the core PeopleSoft CRM attribute functionality. Product-specific attributes are extended to the insurance product as part of this functionality. Attributes can be assigned at the individual product, product group, or product package level.

Limits and deductibles are insurance-specific attributes.

The limit of liability indicates the maximum amount that the policy will honor for a particular coverage. Insurance companies typically offer a range of predefined limits for different types of coverages. These are defined in the product model by the insurance provider. They are added as attributes on the Attribute tab in the Product component.

For example, assume that Bodily Injury coverage is \$100,000 per person, \$300,000 per accident. You set up an attribute category, "INS-PERSONAL AUTO-BODILY INJ." For Attribute Name, Limits (Per Person), set up two values: Attribute Value = \$50,000 USD, and Attribute Value = \$100,000 USD. For the Attribute Name, Limits (Per Accident), set up Attribute Value = \$150,000 USD, and Attribute Value = \$300,000 USD. You can add additional attribute values to meet your business needs.

There are different limits for different coverages. Because the drop-down list box of available values changes from coverage to coverage, you will create a different limit attribute for each coverage that has limits, and associate the limit attribute to the appropriate attribute category.

A deductible is the amount of an insured loss for which the insured is financially responsible before an insurance policy provides coverage. A flat deductible is usually a monetary amount. You predefine deductibles in the product model. Deductibles are added as attributes for a coverage on the Attribute tab. The attribute is called *Deductibles*, and contains the available values in a drop-down list box. The deductible attribute is related to the appropriate attribute category.

You define these limits based on your business needs. For example, you may define an attribute called *Deductibles* with values of \$250 USD and \$500 USD. Because this creates the drop-down list box of available values that changes from coverage to coverage, you create a different deductible attribute for each coverage that has deductibles. The deductible attribute is related to the appropriate attribute category.

## **Product Application Forms**

You can configure product application forms to vary by channel. For example, you may want to present one form to the customer applying through the internet and a different form to a call center agent taking information from the customer over the phone. You can have only one application form per channel for each product.

In order to apply for a product in FSI or obtain an insurance quote, only Configurator is supported. Any product action that requires re-quoting supports the Configurator model only (for example, actions like adding a driver, removing a driver, and so on).

Other actions, such as Create FNOL, can use any of the following four ways to set up product applications:

- Branch scripts

- Configurator
- URLs
- Online application forms

The following table describes each type:

<b>Application Type</b>	<b>Details</b>	<b>More Information</b>
Branch scripts	<ul style="list-style-type: none"> <li>• Can be configured according to channel</li> <li>• Use the core branch script functionality.</li> <li>• Are associated with the product and the channel. The association allows the runtime program that accesses the product to initiate the correct branch script.</li> </ul>	See <a href="#">and PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook</a> , "Defining Scripts." and <a href="#">PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook</a> , "Running Scripts."
Configurator	<ul style="list-style-type: none"> <li>• Uses the core Configurator functionality.</li> <li>• You associate a configuration schema with the product and the channel. The association allows the runtime program that accesses the product to initiate the Configurator.</li> </ul>	See <a href="#">and PeopleSoft Advanced Configurator 9.1 PeopleBook</a> , "Getting Started with PeopleSoft Advanced Configurator."
URL	<ul style="list-style-type: none"> <li>• Can be configured according to channel.</li> <li>• Links to an external web application.</li> <li>• Since the URL is an external link, it is not inside your firewall. Use the URL to integrate with third-party web-data-collecting applications.</li> </ul>	
Application Form	<ul style="list-style-type: none"> <li>• Can be configured according to channel.</li> <li>• Set up an application form using the Application Form component.</li> </ul>	See <a href="#">and Chapter 4, "Setting Up Industry-Specific Functionality," Setting Up Online Application Forms for FNOL</a> , page 26.

## Actions

Product actions are the activities that can be performed on a product. Actions vary by product line. For example, on an automobile policy, you might add a driver, while on a life policy, you might change the beneficiary.

You can associate each action with an application type. When a customer or customer service representative selects an action, the system automatically starts the appropriate application type. Actions can be associated with branch scripts, application forms, or the product configurator.

### See Also

*PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Setting Up Products," Defining Product Actions

## Internal and External Visibility

For financial services you can make product and product group descriptions available internally, externally, or both. All products are internally visible by default.

The internal description is seen only by employees of the financial institution, such as agents or account managers, and is not visible to self-service customers. The external description is seen by self-service customers and the internal audience.

With internal and external visibility, you can:

- Supply two versions of a product description, one for employees and one for self-service customers.

You may need to provide a very detailed description for employees and a marketing oriented description for self-service customers.

- Control certain products so that customers can only access them through employees.

The external visibility for a product or a package is controlled by the External Visibility field on the Product Definition page. For a product group, if the external description field is populated, the product group is external. Otherwise, it is considered to be internal.

---

## Setting Up and Maintaining Product Groups

This section discusses how to:

- Define product groups.
- View product group attributes.

## Pages Used to Set Up and Maintain Product Groups

Page Name	Definition Name	Navigation	Usage
Product Group	RBFPROD_GROUP_TBL	Products CRM, Product Groups, Product Group	Define a group of related products.
Product Group Attributes	RB_ATTR_PRDGRP_SEC	Click the Attributes link on the Product Group page	View attributes for a product group.
Product Group - Linked Products	RBF_PRODGRP_DEF	Products CRM, Product Groups, Linked Products	View products that are contained within this product group.

## Defining Product Groups

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

The screenshot displays the 'Product Group Details' form. At the top, there are tabs for 'Product Group' and 'Linked Products'. The form includes the following fields and values:

- SetID:** FSI01
- Product Group:** CHECKING
- \*Effective Date:** 09/17/2001
- \*Status:** Active
- Group Type:** General
- \*Description:** Checking
- Short Desc:** Checking

At the bottom, the 'Modified' field shows '10/09/2001 2:43PM PDT' by user 'FSISAMPLE'. There is also a link for 'Attributes'.

Product Group page

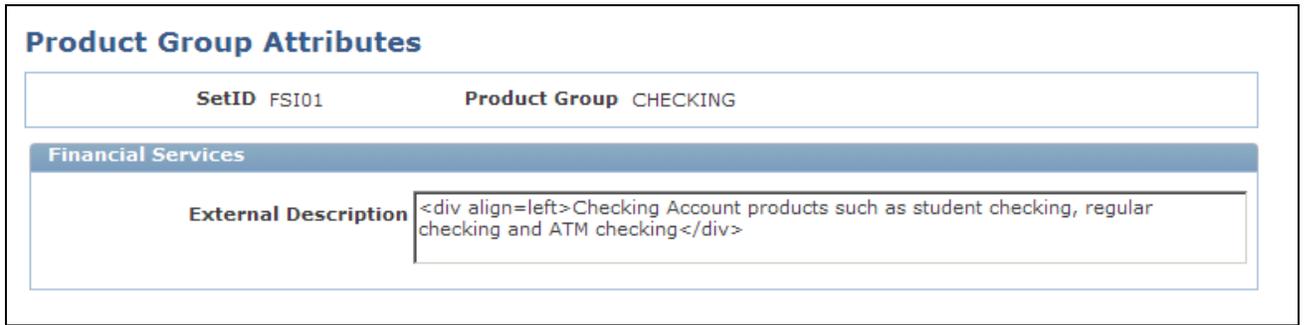
**Status** Enter *Active* or *Inactive*.

**Group Type** Select a category for the group type. You can use this as an additional organizational tool.

**Attributes** Click to access the Attributes page.

## Viewing Product Group Attributes

Access the Product Group Attributes page (click the Attributes link on the Product Group page).

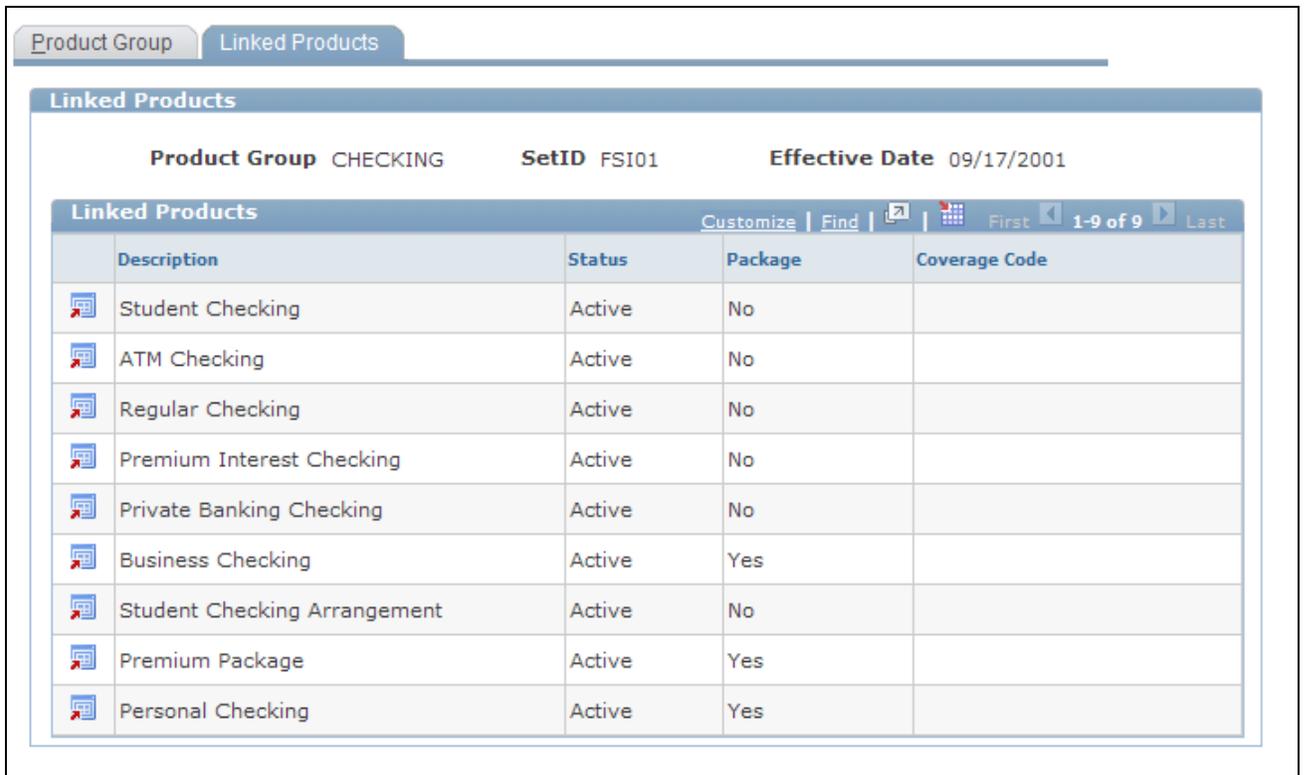


Product Group Attributes page

**External Description** Enter data to make the product group visible to self-service users. If there is no entry in the External Description field, then the product group is visible to internal agents only.

## Confirming Linked Products

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



Linked Products page

The system displays all products that have been associated with the product group. Click the transfer button on the product row to access the Product component and view and update the record.

## Defining Products and Product Packages

This section discusses how to:

- Define products and product packages.
- Link products and packages to product groups.
- Define external descriptions.
- Associate applications with products and packages.
- Define regions.
- View attributes.
- Defining attachments.
- View product packages.
- View and maintain arrangements.
- View and maintain contracts.
- Define actions.
- Initiate business processes.
- Attach images.
- Define correspondence options.

### Pages Used to Define Products

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Product Definition	RBFPROD_DEFN	Products CRM, Product Definition, Product Definition	Set up product information.
Product Definition - Product Groups	RBF_PROD_GROUP_LNK	Products CRM, Product Definition, Product Groups	Link a product to a product group. One product can belong to multiple groups.
Product Definition - External Description	PROD_EXT_DESCR	Products CRM, Product Definition, External Description	Enter the external description of the product to appear on the self-service customer page. The page allows the entry of HTML text, as well as an area to preview the HTML-enabled descriptions.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Product Definition - Application	RBF_PROD_APPL	Products CRM, Product Definition, Application	Associate an application with a product.
Product Definition - Regions	PROD_REGION	Products CRM, Product Definition, Regions	Define availability of product by region.
Product Definition - Attributes	RB_ATTR_RUN_PROD	Products CRM, Product Definition, Attributes	View attributes that are attached to this product on the Product Definition page.
Product Definition - Attachments	PROD_ATT	Products CRM, Product Definition, Attachments	Attach files.
Product Definition - Packages	RBF_PRODKIT_LINK	Products CRM, Product Definition, Packages	View packages that contain the product.
Product Definition - Arrangements	RBF_PROD_ARRA	Products CRM, Product Definition, Arrangements	View the arrangements that are associated with the product or package.
Product Definition - Contracts	RBF_PROD_ACNT	Products CRM, Product Definition, Contracts	View the contracts that are associated with the product or package.
Product Definition - Actions	RBT_PROD_ACTION	Products CRM, Product Definition, Actions	Link actions to the product or package.
Product Definition - Business Process	RBF_PROD_BUSPRJ_PG	Products CRM, Product Definition, Business Process	Initiate business processes to be performed on the product or package.
Product Definition - Images	PROD_IMAGES	Products CRM, Product Definition, Images	Associate images with the product or package. The images that you associate here are used for Internet sales.
Correspondence Options	RBF_BPEL_CORRSP	Products CRM, Product Definition, Correspondence Options	Select correspondence options for the product or product package.

## Defining Products and Product Packages

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

Save Refresh

**Product** Premium Package **Product ID** 000000000000000096  
**SetID** FSI01

Product Definition Product Groups External Description Application Regions Attributes Attachments

**Product Details**

\*Name Premium Package

\*Status Active

Coverage Code

Attribute CHECKING

Category Script Name

Long Description <div align = left>a packaged checking account product for high balance premium customers willing to maintain \$25,000 or more in a savings product</div>

External Visibility

Product Sold To

Business  Consumer

Preview

Product Definition page (1 of 2)

**Product Type**

Product Type Product Package

Package Components Customize Find View All First 1-6 of 6 Last

*Description		
Premium Interest Checking		+ -
Premium Savings Account		+ -
Premium ATM Debit Card		+ -
Overdraft Line of Credit		+ -
Standard Credit Card-Visa		+ -
Standard Credit Card-MC		+ -

Product Definition page (2 of 2)

- Name** Enter up to 30 characters that describe the product or package.
- Status** Select *Active* or *Inactive*.
- External Visibility** Select to make the product description visible externally.  
If selected, the External Description and Long External Description fields must be completed.
- Coverage Code** Coverage codes are limited to five characters.

<b>Product Sold to Business or Consumer</b>	Select if the product is available for business customers, individual consumers, or both.
<b>Attribute Category</b>	Select the attribute category that applies to this product. Use the Product Definition - Attributes page to view the attributes as they appear on internal or external pages.
<b>Script Name</b>	Select an upsell script to use in connection with this product. The upsell script is optional.
<b>Long Description</b>	The extended product description is entered in HTML. This is the description that the internal agent sees.
<b>Preview</b>	Click to display the product description as it appears on the sales entry page.

### ***Product Type***

The fields in the Product Type group box define whether the product is a single product, a product package, or a product arrangement.

<b>Product Type</b>	Select to designate the product as a <i>Single Product</i> , <i>Product Package</i> , or <i>Product Arrangement</i> . The page changes depending on your selection.
<b>Package Components</b>	This group box is displayed if <i>Product Package</i> is selected. A product package has two or more components. Enter the products—coverages, benefits, riders, exclusions, and so on—belonging to this package. You can select only single products, not other product packages.
<b>Arrangement</b>	This group box is displayed if <i>Product Arrangement</i> is selected.

### **See Also**

[Chapter 15, "Working with Arrangements and Contracts," page 153](#)

## **Linking Products and Packages to Product Groups**

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

*Product Group Type		*Product Group	Description		
General	CHECKING	Checking	+	-	
General	SAVINGS	Savings	+	-	

\* Required Field

Product Definition - Product Groups page

### Product Group Type

Select a type based on common product features. The system comes with functional product group types already defined. You can add additional groups.

### Product Group

Associate single products with a product group for organizational purposes. One product can belong to many product groups. You can drill down to the Product Group page from the definition.

## Defining the External Description

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

Product Definition - External Description page

**Description**

Enter a name to appear for self-service customers.

If the Description and Long Description fields are completed on this page, then the product is considered to be external.

Entry in these fields selects the External Visibility check box on the Product Definition page automatically.

**Long Description**

Enter the extended product description in HTML. This is the description that the self-service customer sees.

The `<html>`, `<title>`, `<header>`, and `<body>` tags are not supported.

Use this field to enter URL links to websites used during the sell process to deliver detailed information.

**Preview**

Click to show the product description as it appears on the sales entry page.

## Associating Applications with Products and Packages

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

Product Definition - Application page

<b>Configured Package</b>	Select to define the product package as a fully configured package. A fully configured package uses the product configurator at runtime and creates a package based on your choices from the Configurator model.
<b>Distribution Model</b>	Select the distribution model related to the product package.
<b>Channel</b>	Indicate where the application will be available. You may define only one application form per channel. Insert a row to add a new channel. Delivered values are <i>All Channels</i> , <i>Internal</i> , and <i>Web Self-Service</i> .
<b>Application Form</b>	Select if you are using an application form created in the Application Form component.
<b>Form Name</b>	Enter the application form ID. Click the transfer button to access the application form component and view and update the form.
<b>Branch Script</b>	Select to use a branch script. The association allows the runtime program that accesses the product to initiate the correct branch script.
<b>Script Name</b>	Enter the branch script name. Click the transfer button to access the branch script tree and view and update the form.
<b>URL</b>	Select to use an internal link to an application form.
<b>URL</b>	Enter the URL to transfer the customer to the application form.

See [Chapter 14, "Working with Products in Financial Services and Insurance," Product Application Forms, page 130.](#)

## Defining Regions

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

The screenshot displays the 'Product Definition - Regions' page. At the top, there are 'Save' and 'Refresh' buttons. Below them, the product name 'Student Checking' and 'SetID FSI01' are shown, along with the 'Product ID 00000000000000000036'. A series of tabs allows navigation between different sections: Product Definition, Product Groups, External Description, Application, Regions (currently active), Attributes, and Attachments. Under the 'Region Options' section, three radio buttons are present: 'All Regions' (which is selected), 'Only in Regions below', and 'All except Regions below'. The 'Product Region Information' section features a table with columns for '\*Region ID', 'Description', 'Start Date', and 'End Date'. The 'Start Date' is set to 03/15/2006 and the 'End Date' is 12/31/2099. The table indicates there is 1 of 1 records.

Product Definition - Regions page

The fields under Region Options enable you to define specific areas where the product is available for sale.

- All Regions** Select to make the product generally available.
- Only in Regions below** Select to make the product unavailable in all regions except those you specify. Use the Region ID field to identify the regions (by region ID) where the product can be sold. Use this to set up products that are only available in specific states.
- All except Regions below** Select to make the product available in all regions except those you specify. Use the Region ID field to identify the regions in which the product is unavailable.

---

**Note.** Region IDs are defined on the Region page, and are of the type *Product Sales*.

---

## Viewing Attributes

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

Save Refresh

**Product** Premium Package **Product ID** 000000000000000096  
**SetID** FSI01

Product Definition
Product Groups
External Description
Application
Regions
Attributes
Attachments
▶

**Order Capture Attributes** Never has Attributes ▼

**Features - Checking**

**Features**

**User Type**

**Earns Interest**

**Terms - Checking**

**Terms and Conditions**

**Monthly Fee**

**Balance to Waive Fee**

**Teller Fee**

Product Definition - Attributes page (1 of 2)

**Services - Checking**

**Services**

**Free calls**

**On-Line Banking**

**Pay by Phone**

**Partner Product Information**

**Available to Bronze Partners**

**Available to Gold Partners**

**Available to Platinum Partners**

**Available to Silver Partners**

Product Definition - Attributes page (2 of 2)

The system displays the attributes associated with the product or package on the Product Definition page. You can select additional values from the drop-down list boxes.

**See Also**

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

**Defining Attachments**

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

The screenshot displays the 'Product Definition - Attachments' page. At the top, there are 'Save' and 'Refresh' buttons. Below them, the product information is shown: 'Product Student Checking' and 'SetID FSI01' on the left, and 'Product ID 000000000000000036' on the right. A navigation bar includes tabs for 'Product Definition', 'Product Groups', 'External Description', 'Application', 'Regions', 'Attributes', and 'Attachments'. The 'Attachments' tab is active. Below the navigation bar is the 'Attachment Details' section, which contains a table with the following columns: 'File Name', 'File Type' (with a dropdown menu showing 'Literature'), 'Description' (with a text input field and a document icon), 'Required' (with a checkbox), '\*Audience' (with a dropdown menu showing 'All'), 'Added By', and 'Datetime Added'. Below the table is an 'Attach a File' button.

Product Definition - Attachments page

<b>File Name</b>	Displays the name and extension of the attached file. Click to activate a pop-up window that displays the contents of the attachment. The contents of this file will be viewed by the self-service user during product selection.
<b>File Type</b>	Select an attachment type. Options are: <i>Disclosure</i> , <i>Literature</i> , <i>White Paper</i> , and <i>Prospectus</i> .
<b>Description</b>	Enter a brief description of the attachment.
<b>Required</b>	This flag is used at runtime to identify whether the user must view the attachment to order the product, or whether the information is solely informational.
<b>Audience</b>	Select the audience for the attachment. Options include <i>All</i> , <i>External</i> , <i>Internal</i> , and <i>None</i> .
<b>Attach a File</b>	Click to select the file to attach to the product.

---

**Note.** Refer to Adding Attachments for the associated rules.

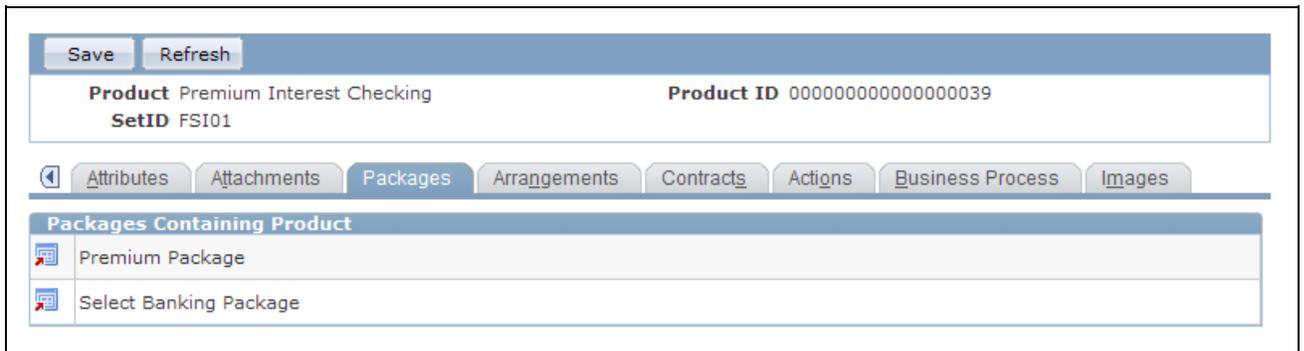
---

**See Also**

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

## Viewing Product Packages

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



Product Definition - Packages page

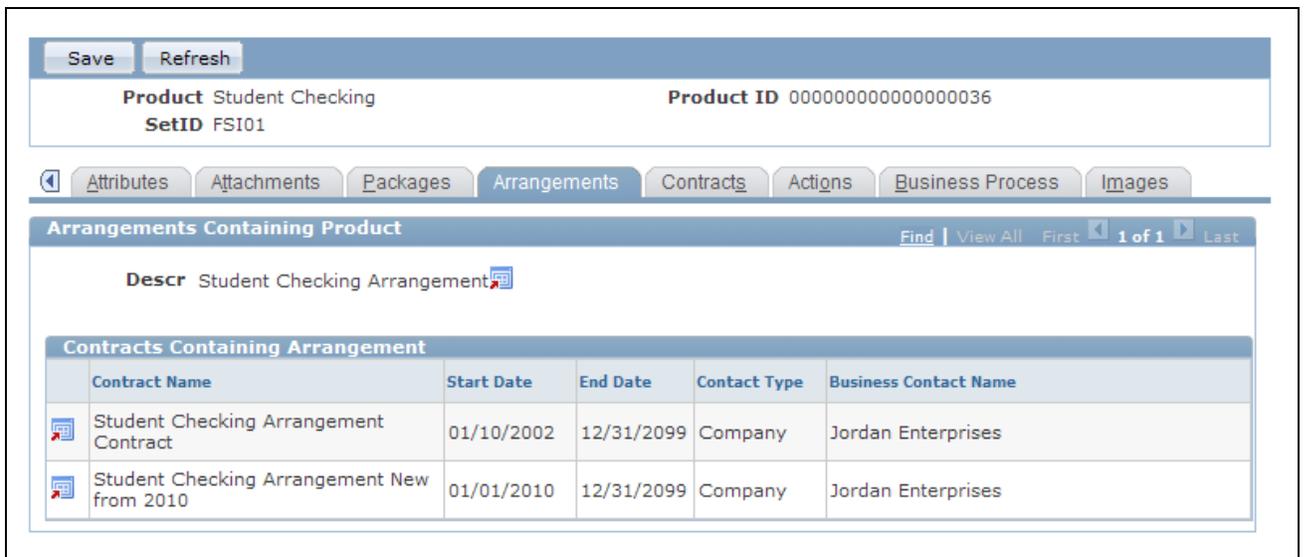
The system displays all packages that contain the product. Click the transfer button to drill down to package details.

### See Also

*PeopleSoft CRM 9.1 Product and Item Management PeopleBook, "Setting Up Products"*

## Viewing and Maintaining Arrangements

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



Product Definition - Arrangements page

The system displays the arrangements associated with the product. Click the transfer button in the Arrangements Containing Product row to access the Arrangement component, where you can view and update the record.

The system also displays the contracts that contain the arrangement. Click the transfer button in the Contracts Containing Arrangement row to access the Contract component, where you can view and update the record.

## Viewing and Maintaining Contracts

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

Contracts Containing Product					
Contract Name	Start Date	End Date	Contact Type	Business Contact Name	
Student Checking Contract	01/08/2002	12/31/2009	Company	Jordan Enterprises	

Product Definition - Contracts page

The system displays the contracts associated with the product.

Click the transfer button in the Contracts Containing Product row to access the Contracts component, where you can view and update the record.

## Defining Actions

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

*Action Name	Action Type	Application Method	Application Name
Change Coverage	Insurance	Configurator	Insurance Vertical - Auto

Product Definition - Actions page

### Action Name

Select an action to associate with the product or package. An action defines an activity that can be performed on the policy.

<b>Action Type</b>	Displays the action type defined in the Action component.
<b>Application Method</b>	Displays the application method defined in the Action component.
<b>Application Name</b>	Displays the name that appears in Web Self Service.

### See Also

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

## Initiating Business Processes

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

The screenshot displays the 'Product Definition - Business Process' page. At the top, there are 'Save' and 'Refresh' buttons. Below them, the product information is shown: 'Product Premium Interest Checking' and 'Product ID 000000000000000039', with 'SetID FSI01'. A navigation bar includes tabs for 'Attributes', 'Attachments', 'Packages', 'Arrangements', 'Contracts', 'Actions', 'Business Process', and 'Images'. The 'Business Process' tab is selected, showing a 'Business Process' section with a search bar and navigation controls. The 'Eff Date' is set to 06/26/2006. The 'Service Operation' and 'Cancel Operation' are both set to 'Convergent Order BPEL Proce'. A 'Modified' field is located at the bottom of the page.

Product Definition - Business Process page

You can initiate business processes to be performed on the product or package.

## Attaching Images

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

*Image Size		Description	JPEG Image		
Large Image				Upload	+ -
Medium Image				Upload	+ -

Product Definition - Images page

You can associate images of different sizes with the product or package. The image will appear in the product catalog.

## Defining Correspondence Options

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

You can set up automatic correspondence to be sent based on selected actions.

### See Also

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Correspondence Management"*

## Defining Product Relationships

This section discusses defining relationships for products and product groups.

### Pages Used to Define Product Relationships

Page Name	Definition Name	Navigation	Usage
Product Relationships	PROD_RELATIONS	Products CRM, Product Relationships, Product Relationships	Define relationships with products and product packages.
Product Relationships - Relationships Overview	PROD_REL_OVERVIEW	Products CRM, Product Relationships, Relationships Overview	View product and product group relationships.

### Defining Product Relationships

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

Product Relationships page

**Product Relationship** Select the relationship to establish between products or product groups.

**Product ID** Enter the product ID for the related product.

**Catalog** Select to display the product in the catalog.

**Start Date and End Date** Enter the start and end dates for the relationship.

See *and PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Setting Up Product Definitional Elements."

## Setting Up Actions for Insurance

This section discusses how to set up actions.

### Page Used to Set Up Actions

Page Name	Definition Name	Navigation	Usage
Actions	RBT_ACTION	Set Up CRM, Product Related, Order Capture, Action, Action	Set up actions for products and product groups.

### Setting Up Actions for Insurance

Access the Actions page (Set Up CRM, Product Related, Order Capture, Action, Action).

#### Action

**Application Detail**

SetID INS01

Action ID 20

Action Code CBENE

\*Action Name

\*Action Type   Re-Quote

Action Reference

Do Not Publish to Billing

**Application Method**

Application Method

Form Name

\* Required Field

Action page

**Action Code** Displays the action code that you entered on the search page.

**Action Name** Enter the name for the action or change.

<b>Action Type</b>	Select an action type.
<b>Re-Quote</b>	Select if the action needs a re-quote because of a changed premium.
<b>Action Reference</b>	This field is not used for insurance.
<b>Application Method</b>	Select the application method to be associated with the change. Values are <i>Application Form</i> , <i>Configurator</i> , and <i>Branch Script</i> .
<b>Script Name</b>	Select the script to be associated with the change.



## Chapter 15

# Working with Arrangements and Contracts

This chapter provides an overview of arrangements and contracts and discusses how to:

- Set up and maintain arrangements.
- Set up and maintain contracts.
- Set up and align attribute definitions for products, arrangements, contracts, and the sales process.

---

## Understanding Arrangements and Contracts

This section discusses:

- Arrangements.
- Contracts.
- Contract retrieval.
- Terms and conditions retrieval.

## Arrangements

An arrangement is associated with one and only one product or product package. A product or product package can be associated with zero, one, or more arrangements.

An arrangement has a set of terms and conditions in addition to the following three fields:

- Raise %
- Reduction %
- Waive contract fee flag

---

**Note.** Other terms and conditions can be defined by the system administrator using configurable attribute definitions.

---

## Contracts

Contracts are available only to organizational customers. An organization can be a company, a partnership, or an alternate capacity.

A contract is an association between the following two parts:

- One and only one organization
- One and only one product, product package, or arrangement

A contract has a set of terms and conditions in addition to the following three fields:

- Raise %
- Reduction %
- Waive contract fee flag

---

**Note.** Additional terms and conditions can be defined on a contract. PeopleSoft enables system administrators to define terms and conditions for a certain type of object to fit their organization by using configurable attribute definitions.

---

The availability of a contract is controlled by start date and end date. In implementation, the system sets the default end date to December 31, 2099.

A contract is an entity different from a commercial product. It is possible that a product, product package, or arrangement is not associated with a contract. A contract is tied to an organization whereas an arrangement is not.

A contract is an entity different from an account. A contract is an agreement about an unsold product between the bank and an organization. An account is an agreement about a sold product between the bank and a customer.

It is possible for a product, a product package, or an arrangement to be associated with multiple contracts for an organization. These contracts may have overlaps on valid periods, which are defined by start date and end date.

If there are multiple contracts valid for a product and organization for a certain period of time, the sales process uses the newest contract featured by a later start date.

For example:

- P001 is ATM Checking product.
- P006 is an arrangement based on the product P001.
- C001 is a contract based on P006 for ADC Company valid between February 1, 2002 and March 31, 2002.

If the user tries to create a new contract, C002 for ADC Company based on P00—ATM Checking, valid between February 15, 2002 and March 31, 2002, it is allowed. The system displays a message reminding the user about the existence of the multiple contracts for ADC Company on P001.

For the period between February 1, 2002 and February 14, 2002, C001 is the only valid contract based on P001. In the order capture process, when a customer selects P001, the system uses C001, which is the only contract valid during this period, to determine the terms and conditions.

For the period between February 15, 2002 and March 31, 2002, there are two valid contracts based on P00—C001 and C002. In the sales process, if a customer selects P001, the system uses C002, which is the newest contract among the contracts that are valid during this period, to determine the terms and conditions.

## Contract Retrieval

During an agent-controlled sale to the contact of an organization, the system retrieves any available contract after the customer selects the product.

Agents can retrieve an available contract after verifying employment information. The employment information is verified by the agent using the verification key provided by the customer or by checking supporting documents.

The customer can choose to apply for the product with or without using the retrieved contract.

---

**Note.** Self-service users cannot retrieve an available contract and apply for a product using a contract.

---

## Terms and Conditions Retrieval

When a customer selects a product or package during the sales process, a complete set of terms and conditions for the product or product package is retrieved:

- A complete set of terms and conditions is retrieved from the terms and conditions defined for product, product package, arrangement, or contract.
- The terms and conditions in an arrangement for a product or product package are retrieved only when the following two conditions are satisfied:
  - The customer's organization has a contract on that arrangement.
  - The system selects the newest contract (because of its later start date) from the multiple contracts that refer to the same product or product package.
- The terms and conditions defined in later entries override the terms and conditions defined in previous entries.

For example, P001 is ATM Checking, P006 is an arrangement for P001, and C001 is a contract for ADC Company and P006. An employee of ADC Company selects ATM Checking (P001) during the sales process and is interested in applying for an ATM checking account.

The terms and conditions defined in these entries are:

<i>Entry</i>	<i>Term A</i>	<i>Term B</i>	<i>Term C</i>	<i>Term D</i>	<i>Term E</i>	<i>Term F</i>
P001	TermA = 1	TermB = 2	TermC = 3	TermD = 4		

<i>Entry</i>	<i>Term A</i>	<i>Term B</i>	<i>Term C</i>	<i>Term D</i>	<i>Term E</i>	<i>Term F</i>
P006		TermB = 6	TermC = 8		TermE = 9	
C001	TermA = 12		TermC = 15			TermF = 18

1. The sales process gets terms and conditions from P001—ATM Checking:

P001	TermA = 1	TermB = 2	TermC = 3	TermD = 4		
------	-----------	-----------	-----------	-----------	--	--

2. Because this organization has a contract C001 on an arrangement P006 for this product P001, the system gets the terms and conditions from the arrangement P006 to override terms and conditions obtained from product P001:

P001	TermA = 1	TermB = 2	TermC = 3	TermD = 4		
P006	TermA = 1	TermB = 6	TermC = 8	TermD = 4	TermE = 9	

Terms B and C are overridden in this step. Term D is expanded in this step.

3. Finally, the system obtains terms and conditions from contract C001.

These are the terms and conditions that appear during the sales process:

P001	TermA = 1	TermB = 2	TermC = 3	TermD = 4		
P006	TermA = 1	TermB = 6	TermC = 8	TermD = 4	TermE = 9	
C001	TermA = 12	TermB = 6	TermC = 15	TermD = 4	TermE = 9	TermF = 18

Terms A and C are overridden in this step. Term F is expanded in this step.

## Alignment of Attribute Definitions for Products, Arrangements, Contracts, and the Sales Process

To make product definition, arrangement definition, contract definition, and the sales process work together correctly, it is important to set up attribute definitions for these objects correctly.

To set up and align attribute definitions for products, arrangements, contracts, and the sales process:

1. Set up attribute definitions for products.

The Object Type for products is *Product*.

## 2. Set up and align attribute definitions for arrangements.

The Object Type for arrangements is also *Product*. The attribute set defined for arrangements must include the attribute set for products. Additional attributes other than those defined for products, specifically for arrangements, can be defined by providing certain conditions. Any attributes specific to arrangements but not controlled by Attribute Category values are internal arrangement attributes, not displayed during the sales process.

## 3. Set up and align attribute definitions for contracts.

The Object Type for contracts is *Contract*. The attribute set defined for contracts must include the attribute set for products and the external attribute set for arrangements. Any attributes specific to contracts but not controlled by Attribute Category values are internal contract attributes, not displayed in the sales process.

## 4. Set up and align attribute definitions for the sales process.

The Object Type for the sales process is *Sales Product Application*. The attribute set defined for the sales process must include the attribute set for products and the external attribute set for arrangements and contracts.

---

## Setting Up and Maintaining Arrangements

This section discusses how to:

- Set up arrangements.
- View attributes.
- View arrangement contracts.

---

**Note.** An arrangement is defined in the same component where a product is defined. However, only the values defined on the Product Definition page, the Attributes page, and the Contracts page pertain to arrangements.

---

### See Also

[Chapter 14, "Working with Products in Financial Services and Insurance," page 125](#)

## Pages Used to Set Up and Maintain Arrangements

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Product Definition	RBFPROD_DEFN	Products CRM, Product Definition, Product Definition	Set up arrangement information.

Page Name	Definition Name	Navigation	Usage
Product Definition - Attributes	RB_ATTR_RUN_PROD	Products CRM, Product Definition, Attributes	View the attributes that are attached to this arrangement on the Product Definition page.
Product Definition - Contracts	RBF_PROD_ACNT	Products CRM, Product Definition, Contracts	View the contracts using the arrangement.

## Setting Up Arrangements

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

The screenshot displays the 'Product Definition' page for 'Student Checking Arrangement'. At the top, there are 'Save' and 'Refresh' buttons. Below them, the product name and ID are shown: 'Product Student Checking Arrangement' and 'Product ID 00000000000000071'. A 'SetID' of 'FSI01' is also visible. A navigation bar includes tabs for 'Product Definition', 'Product Groups', 'External Description', 'Application', 'Regions', 'Attributes', and 'Attachments'. The 'Product Details' section contains fields for \*Name (Student Checking Arrangement), \*Status (Active), Coverage Code, Attribute Category (CHECKING), and Script Name. There are also checkboxes for 'External Visibility' and 'Product Sold To' (Business and Consumer). The 'Long Description' field contains HTML code: '<div align = left>An arrangement for the product of Student Checking</div>'. A 'Preview' button is located below this field. The 'Product Type' section shows 'Product Arrangement' selected. The 'Arrangement' section includes \*Description (Student Checking), a checked 'Waive Contract Fee' checkbox, 'Reduction %' (empty), and 'Raise %' (2.50).

Product Definition page

Use the fields in the Product Type group box to define the product arrangement.

### Product Details

**Status** Select the status: *Active* or *Inactive*.

<b>External Visibility</b>	For an arrangement, the value of external visibility does not matter. What is important is the external visibility of its related product.
<b>Coverage Code</b>	Enter the coverage code. The insurance industry uses the coverage code to define the coverage provided by a product.
<b>Product Sold to Business or Consumer</b>	For an arrangement, the system automatically selects <i>Business</i> , because an arrangement can be sold only to organization customers.
<b>Attribute Category</b>	The system automatically populates this field with the attribute category for the related product. This ensures that the attributes defined for the arrangement align with the attributes defined for the related product.
<b>Script Name</b>	Select an upsell script for the product.
<b>Long Description</b>	Displays the extended arrangement description in HTML. This is the description that the internal agent sees.
<b>Preview/Preview Area</b>	Click the preview button to show the arrangement description in the preview area as it will appear on the sales process page.
 <b><i>Product Type</i></b>	
<b>Product Type</b>	Select to designate the product as an arrangement; you can then enter the component information in the corresponding fields.
 <b><i>Arrangement</i></b>	
<b>Waive Contract Fee</b>	Select to waive the contract fee.
<b>Reduction %</b>	Enter the percentage of rate decrease, if applicable. For example, a mortgage arrangement may include an interest rate decrease.
<b>Raise %</b>	Enter the percentage of rate increase, if applicable. For example, a checking account arrangement may include an interest rate increase.

**See Also**

[Chapter 14, "Working with Products in Financial Services and Insurance," page 125](#)

**Viewing Attributes**

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

Save Refresh

**Product** Student Checking Arrangement **Product ID** 000000000000000071  
**SetID** FSI01

Product Definition Product Groups External Description Application Regions Attributes Attachments

**Order Capture Attributes** Never has Attributes

**Features - Checking**

**Features**

**User Type** Student

**Earns Interest** No

**Terms - Checking**

**Terms and Conditions**

**Monthly Fee**

**Balance to Waive Fee**

**Teller Fee** Not Applicable

Product Definition - Attributes page (1 of 2)

**Services - Checking**

<b>Services</b>	<input style="width: 80%;" type="text" value="Monthly service fee: \$1.00"/>
<b>Free calls</b>	<input style="width: 80%;" type="text" value="6"/>
<b>On-Line Banking</b>	<input style="width: 80%;" type="text" value="Yes"/>
<b>Pay by Phone</b>	<input style="width: 80%;" type="text" value="No"/>

**Remark - Arrangement**

**Remark**

**Partner Product Information**

<b>Available to Bronze Partners</b>	<input style="width: 60%;" type="text"/>
<b>Available to Gold Partners</b>	<input style="width: 60%;" type="text"/>
<b>Available to Platinum Partners</b>	<input style="width: 60%;" type="text"/>
<b>Available to Silver Partners</b>	<input style="width: 60%;" type="text"/>

Product Definition - Attributes page (2 of 2)

Attributes are selected by the Attribute category selected on the Product Definition page. The Remark attribute is not controlled by the Attribute category; it appears for all arrangements. Data entered in the Remark field is only visible internally and does not appear during the sales process.

## Viewing Arrangement Contracts

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

Save Refresh

**Product** Student Checking Arrangement **Product ID** 000000000000000071  
**SetID** FSI01

Attributes Attachments Packages Arrangements **Contracts** Actions Business Process Images

**Contracts Containing Product**

	Contract Name	Start Date	End Date	Contact Type	Business Contact Name
	Student Checking Arrangement Contract	01/10/2002	12/31/2099	Company	Jordan Enterprises
	Student Checking Arrangement New from 2010	01/01/2010	12/31/2099	Company	Jordan Enterprises

Product Definition - Contracts page

The system displays the contracts that have been associated with the arrangement. Click the transfer button in the contract row to access the Contracts component, where you can view and update the record.

## Setting Up and Maintaining Contracts

You can set up contracts using individual products, product packages, or product arrangements.

This section discusses how to:

- Set up contracts.
- View contract attributes.

### Pages Used to Set Up and Maintain Contracts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Product/Arrangement Contracts - Contract	RBF_ACNT	Customer Contracts CRM, Product/Arrangement Contracts, Contract	Set up a contract and associate the contract with a business contact and product.
Contract - Attributes	RBF_ATTR_ACNT	Customer Contracts CRM, Product/Arrangement Contracts, Attributes	View attributes associated with the contract.

### Setting Up Contracts

Access the Contract - Contract page (Customer Contracts CRM, Product/Arrangement Contracts, Contract).

### Contract

Save | Add Contract | 360 360-Degree View | Search | Previous | Next | Personalize

**Name** Student Checking Arrangement Contract **SetID** FSI01

**Contract ID** 20

Contract Attributes

**Customer**

Company

Phone

[Advanced Search](#)

**Contract**

<p style="margin: 5px 0;">*<b>Contract Name</b> <input type="text" value="Student Checking Arrangemen"/></p> <p style="margin: 5px 0;">*<b>Start Date</b> <input type="text" value="01/10/2002"/> </p> <p style="margin: 5px 0;"><b>Attribute Category</b> <input type="text" value="CHECKING"/></p> <p style="margin: 5px 0;"><b>Raise %</b> <input type="text" value="4.50"/></p>	<p style="margin: 5px 0;">*<b>Product</b> <input type="text" value="Student Checking Arrangeme"/> </p> <p style="margin: 5px 0;">*<b>End Date</b> <input type="text" value="12/31/2099"/> </p> <p style="margin: 5px 0;"><input checked="" type="checkbox"/> <b>Waive Contract Fee</b></p> <p style="margin: 5px 0;"><b>Reduction %</b> <input type="text" value="0.00"/></p>
---	---

**This related product is an arrangement on**

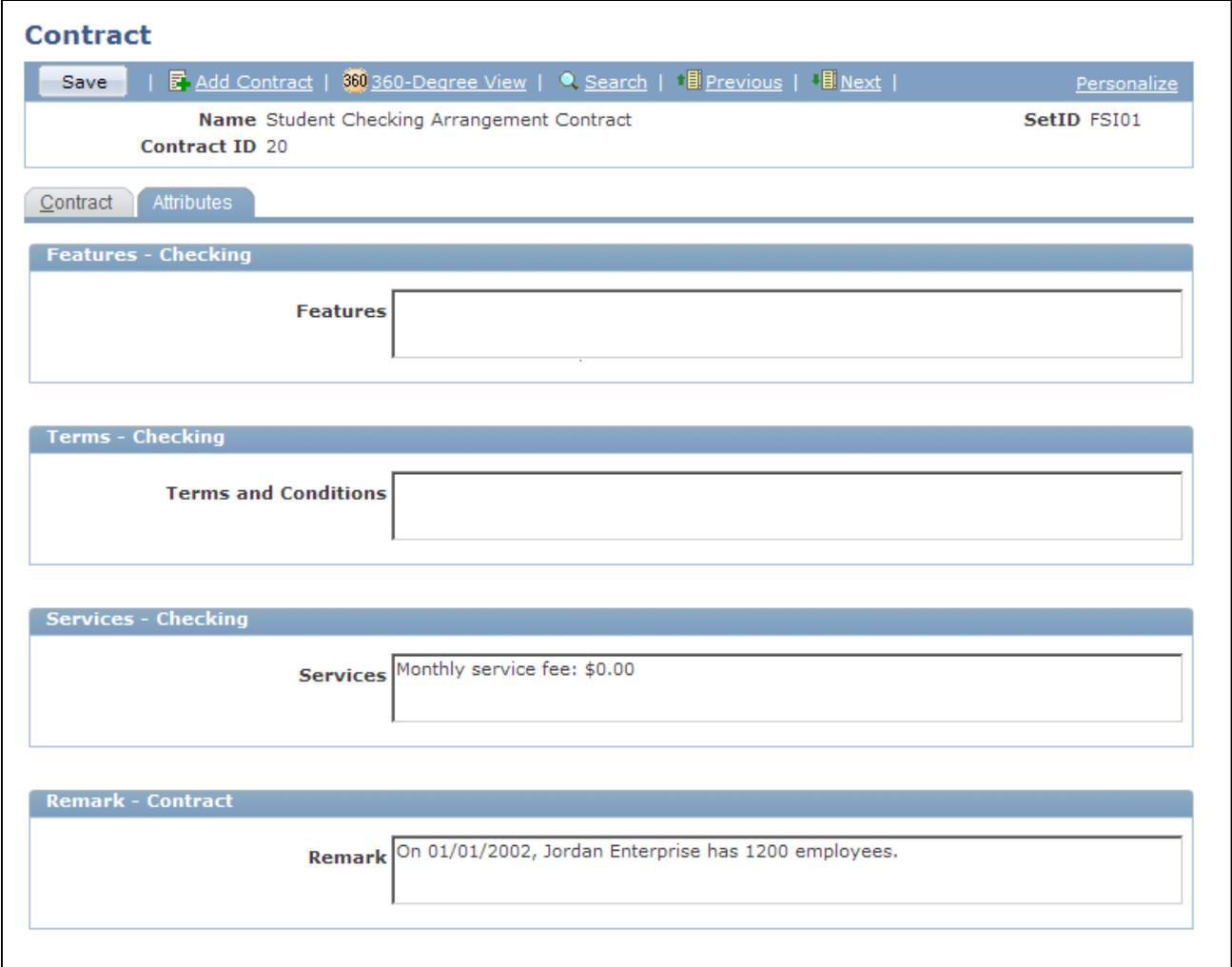
#### Product/Arrangement Contracts - Contract page

- Contract Name** Enter a name for the contract. A contract can be associated with a product, a product package, or an arrangement.
- Product** Enter the name of the product. If the product is an arrangement, the system displays the related product. You can access the Product component to view product details.
- Start Date and End Date** Enter the start and end dates for the contract.
- Attribute Category** The system automatically populates this field with the attribute category for the related product. This ensures that the attribute defined for the contract aligns with the attributes defined for the related product.
- Waive Contract Fee** Select to waive the contract fee.
- Raise %** Enter the percentage of rate increase, if applicable. If this contract is based on an arrangement, this field displays the value set for the arrangement.
- Reduction %** Enter the percentage of rate decrease, if applicable. If this contract is based on an arrangement, this field displays the value set for the arrangement.
- This related product is an arrangement on** If the contract is based on an arrangement, the system displays the name of the arrangement. Click the transfer button to view product details.

**Note.** If a contract definition is based on an arrangement, the Contract Raise %, Contract Reduction %, and Waive Contract Fee fields are populated with values defined for the arrangement. If the customer applies for a product based on an available contract, these values are obtained only from the contract, not from the arrangement.

## Viewing Contract Attributes

Access the Product/Arrangement Contracts - Attributes page (Customer Contracts CRM, Product/Arrangement Contracts, Attributes).



**Contract**

Save | Add Contract | 360 360-Degree View | Search | Previous | Next | Personalize

Name Student Checking Arrangement Contract SetID FSI01  
Contract ID 20

Contract Attributes

**Features - Checking**

Features

**Terms - Checking**

Terms and Conditions

**Services - Checking**

Services Monthly service fee: \$0.00

**Remark - Contract**

Remark On 01/01/2002, Jordan Enterprise has 1200 employees.

Product/Arrangement Contracts -Attributes page

The system displays the attribute categories applicable to the contract. In this example, the Remark attribute is not controlled by the attribute categories; it appears for all contracts. Data entered in the Remark field is only visible internally and does not appear during the sales process.

### See Also

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

## Chapter 16

# Working with Financial Accounts

This chapter provides overviews of financial accounts, integration with legacy systems, and discusses how to:

- Set up account defaults.
- View financial account information.
- Modify financial accounts.

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## Understanding Financial Accounts

A *financial account* represents a holding by a customer of a product or service provided by financial services industries, including insurance, wealth management, and banks. The financial account function presents information from various legacy systems in a consistent interface. The financial account maps to the product, inheriting the terms and conditions from the product purchased by the customer.

The Financial Account record and its sub-records are created by the legacy administration systems. The Product order process functionality sends the completed application to the legacy system, the legacy system creates the account in their own area and then sends a message to CRM. The CRM system reads the inbound message and creates the account header record and the associated sub records inside its own system.

A financial account is held by a business contact. The business contact may be a person, company, partnership or an alternate capacity.

Each financial account record represents one financial services account. If a business contact has two checking accounts, there is one financial account instance in the financial services database for each.

A financial account is associated with the terms and conditions related to the product. Additional terms and conditions can be applicable to specific accounts.

## Views of Financial Accounts

PeopleSoft delivers customer, agent, account manager, and application administrator permission groups for PeopleSoft Banking Transactions, PeopleSoft Bill Presentment and Account Management, PeopleSoft Policy and Claims Presentment, and PeopleSoft Client Management.

### **Customer**

The self-service customer navigates to account detail records by way of the My Accounts pagelet.

My Accounts contains a listing of accounts for which the customer is the owner, authorized user, or beneficiary, or, in other words, has security matrix entry in his or her name. The account detail is read-only for the customer. No information can be changed on this page.

### ***Agent***

The financial services agent does not have permission to search the listing of account records held by customers. Agent access is strictly controlled. An agent can only view the details of an account held by a customer who is explicitly identified. Agents can view an account only when they identify the customer and navigate to the customer's 360-Degree View. Every entry of the agent to a particular customer's 360-Degree View is traced by access trace mechanism.

### ***Account Manager and Administrator***

The financial services account manager and the administrator has more authority to search for an existing account record.

There is a search page available to find an existing account record. The account detail is read-only. In addition, they can also see the accounts by navigating through the 360-Degree View as the agent does.

## **Financial Account Types**

Financial account information is provided for a number of contract types that correspond to product types.

As PeopleSoft CRM applications are delivered, the following financial accounts are available:

- Checking account.
- Savings account.
- Credit account.
- Insurance policy.
- Investment account.
- Loan.

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## **Understanding Integration with Legacy Systems**

This section discusses integration requirements.

Two components must be configured for the integration to function correctly:

1. Integration Broker setup.

2. A legacy system can post the appropriate XML file to the uniform resource locator of the application messaging gateway. The PeopleSoft system then asynchronously subscribes to this data and loads it into the production tables. A legacy system can also choose to use a flat file to represent its data. An application engine process converts the flat file into an XML document that is in turn published to the application messaging gateway. The process run to perform this function automates the conversion of a flat file to an XML document and also the publishing process. For XML post, inbound data is validated during subscription. For flat files, data validation occurs during the publishing phase and again during the subscription phase.

The goal is to provide an integration framework to subscribe to inbound data from any legacy system. The two delivered methods of integration (XML and flat file) still go through the same enterprise integration point (EIP), which is the application messaging gateway.

## Delivered XML Templates

PeopleSoft CRM delivers XML templates to perform the following:

- Add and update financial accounts.
- Set relationships.
- Set security matrix data.
- Set addresses for financial accounts.
- Set financial account fees.

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**Note.** The file contains all of the necessary data definition tags. . The message data should be changed appropriately according to what data is being loaded. Additional transactions should be added as needed.

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## Delivered Flat File Templates

PeopleSoft CRM delivers flat file templates to perform the following:

- Add and update financial accounts. (RBF\_FIN\_ACCT\_FULL\_SYNC)

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**Note.** This is a sample and the file should be modified accordingly.

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- Set relationships for the financial account. (RBF\_FINACCT\_RELATIONSHIPS)
- Set security matrix data. (RBF\_FINACCT\_SECURITY and RBF\_FINACCT\_SECURITY\_BYROLE)
- Set addresses for financial accounts. (RBF\_FINACCT\_ADDRESS)
- Set account fees. (RBF\_FINACCT\_FEES)

## Delivered Flat File Processes

PeopleSoft CRM delivers the flat file process—RBF\_FIN\_ITG—which runs to load a flat file depending on the configuration.

## Assumptions for XML Integration

Review the following assumptions for XML integration:

- All messages must be active in Application Designer.
- The transactions must be set up in Integration Broker through PeopleSoft Internet Architecture, and they must be active.
- Financial account messages require the following fields in the header:
  - CUST\_ACCT\_NBR
  - SYSTEM\_SOURCE\_CD
  - PROD\_SETID
  - PRODUCT\_ID
  - BO\_ID\_OWNER
  - OWNER\_BO\_TYPE
  - FIN\_ACCOUNT\_STATUS

---

**Note.** PROD\_SETID, PRODUCT\_ID, AND OWNER\_BO\_TYPE must be either valid prompt values or valid translate values that exist in the PeopleSoft system. Therefore, any legacy system would need to synchronize the list of possible values for these fields with the PeopleSoft system.

---

- Legacy has to set the AUDIT\_ACTN in the PSCAMA record in the XML file.  
The value of A is Add (INSERT), C is Change (UPDATE), and D is Delete.
- The message should contain the required fields of the parent and the child.
- Cannot insert a child RBF\_CHECK\_ACCT) without a parent (that is, RBF\_FIN\_ACCOUNT).
- If the account has a status of CLOSED, then the security message has to be sent by the legacy to delete the entries in the security matrix.

Financial account address message: CUST\_ACCT\_NBR and SYSTEM\_SOURCE\_CD has to be associated with the message.

Relationships message:

- REL\_TYPE\_ID, ROLE\_TYPE\_ID are assumed to exist both in legacy and PeopleSoft CRM.
- Legacy sends the ID values for relationship type to set the relationships.
- In the relationship message, the first placeholder is the financial account information and the second placeholder is the business object with which the relationship is targeted.

- OWNER\_BO\_TYPE should be sent by legacy, which is one of the following:
  - ACC — Financial Account
  - PER — Person
  - COM — Company
  - ALT — Alternate Capacity
  - PAR — Partnership
- When relationships end, a message has to be sent from legacy with an end date of the relationship.

Security message:

- Legacy sends the XML file with the following fields:
  - FIRST\_NAME
  - MIDDLE\_NAME
  - LAST\_NAME
  - TIN
  - TIN\_TYPE
  - NATIONAL\_ID
  - COUNTRY\_NM\_FORMAT
  - SYSTEM\_SOURCE\_CD
  - CUST\_ACCT\_NBR
  - SRTY\_FUNCTION\_CD
  - APPROVAL\_FLG (Y/N)
  - SRTY\_OPERATOR\_CD
  - SRTY\_AMOUNT
  - SRTY\_ROLE\_CD

BO\_IDs are determined from the PeopleSoft side and the security matrix is populated accordingly. If business object does not exist, the PeopleSoft CRM system creates a business object and sets up the security matrix accordingly.

- To populate the security matrix by role, legacy sends the following information in the XML file.

Legacy has to know the SRTY\_ROLE\_CD, which exists in PeopleSoft CRM:

- FIRST\_NAME
- MIDDLE\_NAME
- LAST\_NAME
- TIN
- NATIONAL\_ID
- TIN\_TYPE
- COUNTRY\_NM\_FORMAT
- SYSTEM\_SOURCE\_CD
- CUST\_ACCT\_NBR
- SRTY\_ROLE\_CD

## Assumptions for File Integration

This process employs a mapping of fields in the flat file. Column headings are specified on the first line of the flat file. These column headings are mapped to actual PeopleSoft field names on the setup page. This mapping is saved and used when loading a flat file. In this way, order of the fields is irrelevant. Headings are used to determine which values correspond to which fields.

To set up the file upload:

- Map the flat file in the Setup component.
- Provide the file map name.
- Specify the delimiter.
- Ensure that all records to be included in the flat file are mapped here in the setup page.

Select the record name (that is, RBF\_FIN\_ACCOUNT) from the prompt. Click the default fields button to automatically populate the grid with the fields of that record. Select the fields that you want to include as headings in your flat file. The flat file field name specified here must match the corresponding column heading that you will use in your flat file.

- Add as many records and fields as is necessary.
- Save the mapping.

To set up the flat file:

- Ensure that the file being used matches the previously created file mapping.
- Ensure that column headings of the file match the flat file field names specified in the mapping.

To run the file upload process:

- Select the File Upload component.
- Add a run control ID.
- Enter the file name (direct or absolute path of the file—for example, c:\pt842\appserv\prcs\dbname\files\filename.txt).

The file must reside on the same computer as the process scheduler.

- Select the file map name from the prompt.  
This map should be the mapping of the file that you will be using.
- Select Run and select the process RBF\_FIN\_ITG, and then click OK.
- Validate in the process monitor that the process has a status of success.

The log file generated by this process is dumped into the root directory of the process scheduler (ps\_cfg\_home\appserv\prcs<dbname>\files).

## Setting Up Account Defaults

This section discusses how to set up account defaults.

### Page Used to Set Up Account Defaults

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
FSI Options	RBF_OPTIONS	Set Up CRM, Product Related, Financial Services, FSI Options	Set up default values for a financial account.

### Defining Account Defaults

Access the FSI Options page (Set Up CRM, Product Related, Financial Services, FSI Options).

See [Chapter 4, "Setting Up Industry-Specific Functionality," page 17.](#)

## Viewing Financial Account Information

This section discusses how to view financial account information.

## Pages Used to View Financial Account Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Financial Account	RBF_FIN_ACCOUNT	Customer Accounts, Review Financial Accounts, Financial Account	View general account information. The Financial Account page varies depending on the type of account.
Financial Account - Relationships	RBF_ACCT_RELATIONS	Customer Accounts, Review Financial Accounts, Financial Account, Relationships	View all relationships that are associated with the account.
Financial Account - ATM Cards	RBF_ACCT_ATM_CARDS	Customer Accounts, Review Financial Accounts, Financial Account, ATM Cards	View all ATM cards that are associated with the account.
Financial Account - Terms and Conditions	RBF_ACCT_ATTR	Customer Accounts, Review Financial Accounts, Financial Account, Terms and Conditions	View the terms and conditions that are associated with the account.
Financial Account - Fees	RBF_FINACCT_FEES	Customer Accounts, Review Financial Accounts, Financial Account, Fees	View all account fees that are associated with the account.
Financial Account - Claims	RBI_CLAIM_HIST	Customer Accounts, Review Financial Accounts, Financial Account, Claims	View claims against insurance policies owned by the customer.
Financial Account - History	RBF_ACTADR_HIST	Customer Accounts, Review Financial Accounts, Financial Account, Address History	View the address and audit history that is associated with the account.
Financial Account - Cases	RBF_FIN_CASE_VW_PG	Customer Accounts, Review Financial Accounts, Financial Account, Cases	Tracks cases associated to the account.
Financial Account - Applications	RBF_FIN_RO_HISTORY	Customer Accounts, Review Financial Accounts, Financial Account, Applications	Tracks history of customer applications for products and services.

## Viewing Financial Accounts

Access the Financial Account page (Customer Accounts, Review Financial Accounts, Financial Account).

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**Note.** The view of the Financial Account page varies with the Account Type. For example, if the account is an *Investment Account*, only the Investment Account group box is displayed on the Financial Account page. The user will not see a group box for Insurance accounts, Credit accounts, and so on.

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### **Account Information**

<b>System Source Code</b>	Legacy data. One translate value, <i>BSCS</i> , is delivered.
<b>Billing Account</b>	The billing account that is associated to the financial account.
<b>Account Owner</b>	The name of the account owner or primary name that is defined for the account.
<b>Status</b>	The current status of the account. Values are: <i>Open,Closed,Inactive, Pending Open,Pending Closed, or Hold</i> .
<b>Partner Name</b>	The name of the partner associated with the customer.
<b>Partner Contact</b>	The contact for the partner.
<b>Description</b>	The description of the account.
<b>Begin Dateand End Date</b>	The date that the account was opened. and the date that the account was closed, if applicable.
<b>Account Type</b>	The type of account. Values are: <i>Checking,Savings,Credit,Insurance, or Investment</i> .
<b>Last Statement Date</b>	The date that the most recent statement was calculated and issued.
<b>Registration Type</b>	The account registration type.  Under Personal accounts, the values are: <i>Individual, Joint with rights of survivorship, Tenants in common, Community property, Named beneficiary, Custodial account for minor, or Trust</i> .  Under Business accounts, the values are: <i>Corporation, Partnership, or LLC</i> .
<b>TIN Type</b> (Tax Identification Number Type)	The taxpayer identification type. Values are: <i>SSN,EIN, or ITIN</i> .
<b>Registration Name</b>	The name that is given to the account by the bank when registering the account.
<b>Tax ID</b>	The taxpayer identification number of the account holder.
<b>New Nickname</b>	The nickname that is given to the account by the owner.
<b>Currency Code</b>	The code of the currency in which the account is held.
<b>Last Refresh</b>	The date and time that this record was last refreshed by the legacy system.

<b>Bill Pay Enabled</b>	Determines whether the Billing Account component is enabled for the account.
<b>YTD Revenue</b> (Year to Date Revenue)	The amount the financial institution has earned from the account year-to-date.
<b>Revenue Basis</b>	The basis for the revenue, either <i>Annual</i> or <i>Monthly</i> .
<b>Last Year's Revenue</b>	The amount the financial institution earned from the account in the previous year.
<b>Where Held</b>	A Wealth Management field indicating the bank where the account is held.
<b>Address</b>	Address for the account holder.
<b>Asset Type 1, Asset Type 2, and Asset Type 3</b>	If assets are a part of the account, this lists the type of asset. These values are used primarily in PeopleSoft Client Management.

### ***Investment Account***

Access Investment Account information on the Financial Account page.

<b>Investment Account Type</b>	The investment account type. Values are: <i>Brokerage, Margin, Securities Custody, Investment Management, Trust, 401(k), Option Account, ESPP, or IRA.</i>
<b>Market Value</b>	The current market value of all the investments that are in the account.

The fields in the Investment Account group box display information about each holding in the investment account.

<b>CUSIP</b> (Committee on Uniform Securities and Identification Procedures)	A number that uniquely identifies a given security. For example, the CUSIP number for Oracle common stock is 68389X105. CUSIP is an acronym for the Committee on Uniform Securities and Identification Procedures, the standards body that created and maintains the classification system. Foreign securities have a similar number called the CINS number.
<b>Acquired Date</b>	The date that the investment was acquired.
<b>Symbol</b>	The stock symbol for the security.
<b>Security Name</b>	The name of the security.
<b>Quantity</b>	The number of investment units held.
<b>Current Value</b>	The current value of the investment.
<b>Asset Type 1, Asset Type 2, and Asset Type 3</b>	Define the type of asset.

**Insurance Account**

View Insurance Account information on the Financial Account page.

All fields are defined in the *PeopleSoft Policy and Claims Presentment 9.1 PeopleBook*.

See and *PeopleSoft Policy and Claims Presentment 9.1 PeopleBook*, "Working with Policies."

**Checking Account**

View Checking Account information on the Financial Account page.

<b>Checking Type</b>	The checking account type. Values are: <i>Regular, Interest Bearing, Private Banking, Business, Student, or ATM Checking.</i>
<b>Account Balance</b>	The available balance for the account showing funds that are available for withdrawal.
<b>Average Balance</b>	The average balance over the most recent accounting period.
<b>Interest Rate</b>	The interest rate if the account pays interest on funds on deposit.
<b>Current Balance</b>	The current balance, which includes deposits that have not yet been cleared.
<b>Last Deposit Amount</b>	The amount of the last deposit.
<b>Last Deposit Date</b>	The date of the last deposit.
<b>Number of Overdrafts</b>	The number of overdrafts that are in the most recent accounting period.
<b>Days in Overdraft</b>	The number of days that the account has been overdrawn in the current accounting period.
<b>Account Fees</b>	Cumulative total of account fees that have been charged to the account.

**Credit Account**

View Credit Account information on the Financial Account page.

See and *PeopleSoft Banking Transactions 9.1 PeopleBook*, "Oracle's PeopleSoft CRM Banking Transactions Preface."

<b>Credit Account Type</b>	The credit account type. Values are: <i>Credit Card, Personal Unsecured Loan, Auto Loan, Mortgage Loan, Home Equity Loan, or Small Business Loan.</i>
<b>Last Statement Balance</b>	The outstanding balance when the last statement was calculated and issued.
<b>Minimum Payment Due</b>	The minimum payment due as shown on the last statement.

<b>Payment Due Date</b>	The payment due date.
<b>Cash Advance</b>	The amount that is used as a cash advance.
<b>Cash Advance Limit</b>	The cash advance limit that is available on a credit card.
<b>Total Limit</b>	The total limit that is available on a credit card.
<b>Last Payment Amount</b>	The amount of the last payment that was made on the account.
<b>Last Payment Date</b>	The date that the last payment was made on the account.
<b>Number of Days Past Due</b>	The number of days that the account payment was past due in the current accounting period.
<b>Amount Past Due</b>	The amount of the past due payment in the current accounting period.
<b>New Balance</b>	The current balance reflecting all charges and payments.

### ***Savings Account***

View Savings Account information on the Financial Account page.

<b>Savings Account Type</b>	The savings account type. Values are: <i>Regular/Money Market, Passbook, or Certificate of Deposit.</i>
<b>Account Balance</b>	The available balance for the account showing funds that are available for withdrawal.
<b>Average Balance</b>	The average balance over the most recent accounting period.
<b>Interest Rate</b>	The interest rate paid on funds that are on deposit.
<b>Current Balance</b>	The current balance, which includes deposits that have not yet been cleared.
<b>Last Deposit Date</b>	The date of the last deposit.
<b>Number of Overdrafts</b>	The number of overdrafts in the most recent accounting period.
<b>Days in Overdraft</b>	The number of days that the account has been overdrawn in the current accounting period.
<b>Account Fees</b>	The fees that are charged to the account in the current accounting period.

See *and PeopleSoft Banking Transactions 9.1 PeopleBook*, "Oracle's PeopleSoft CRM Banking Transactions Preface."

## Working with Relationships

Access the Financial Accounts - Relationships page (Customer Accounts, Review Financial Accounts, Financial Account, Relationships).

See *and PeopleSoft CRM 9.1 Business Object Management PeopleBook*, "Working with the Relationship Viewer," Viewing and Maintaining Relationships and Roles.

## Working with ATM Cards

Access the Financial Account - ATM Cards page (Customer Accounts, Review Financial Accounts, Financial Account, ATM Cards).

See *and PeopleSoft Banking Transactions 9.1 PeopleBook*, "Getting Started with PeopleSoft Banking Transactions."

## Viewing Terms and Conditions

Access the Financial Account - Terms and Conditions page (Customer Accounts, Review Financial Accounts, Financial Account, Terms and Conditions).

Displays the services and features that are included in the contract, and on what terms and conditions.

## Viewing Fees

Access the Financial Account - Fees page (Customer Accounts, Review Financial Accounts, Financial Account, Fees).

The Fees page lists the Transaction Type that was performed on the account, and the cost of doing so.

## Working with Cases

Access the Financial Account - Cases page (Customer Accounts, Review Financial Accounts, Financial Account, Cases).

The Cases page provides a summary of all cases associated with the account. To access the Case page and case details, select a specific case.

See *and PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Managing Cases."

## Working with Applications

Access the Financial Account - Applications page (Customer Accounts, Review Financial Accounts, Financial Account, Applications).

To view a product application, select an application number from the Applications column.

See *and PeopleSoft Banking Transactions 9.1 PeopleBook*, "Getting Started with PeopleSoft Banking Transactions." and *PeopleSoft Policy and Claims Presentment 9.1 PeopleBook*, "Getting Started with PeopleSoft Policy and Claims Presentment."

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## Modifying Financial Accounts

This section provides an overview of account modification and discusses:

- Modifying account fees.
- Modifying account relationships.
- Modifying credit card parameters
- Modifying currency.
- Modifying product.
- Modifying status.
- Modifying TIN type and number.

## Understanding Account Modifications

PeopleSoft CRM delivers account modification functionality for financial services organization. These account features can be modified:

- Account fee
- Account relationships
- Credit card parameters
- Currency
- Product
- Status.
- TIN type and number.

Each account modification request creates a case with the type of *Modify Account*. A business project is instantiated and associated with the case. The agent works through the phases and tasks in the business project and can close the case after the business project is closed. At the end of the business project a message is published to the legacy system reporting the changes requested. After the legacy system completes the modification request, then the system send a new and separate account creation message to reflect the changes in the CRM system.

## Common Elements Used in this Section

<b>Modification Type</b>	Displays the modification type you chose to access the page.
<b>Account Number</b>	Select the account that is to be modified.
<b>Transaction Status</b>	Status of the transaction will be <i>Open</i> until the business project is complete. When the actual modification has taken place and the message is received from the legacy system, the transaction status is changed to <i>Closed</i> .

## Pages Used to Modify Accounts

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Modify Account	RBF_MODIF_ACCT	Customer Accounts, Modify Account, Modify Financial Account	Select the change to be made to the account. The system displays a unique page for each account modification type.
Modify Account - Account Fee	RBF_MODIF_ACCT	On the Modify Financial Account page, select the Account Fee modification type	Use this page to change the account fee on a specific account for a particular type of transaction.
Modify Account - Account Relationships	RBF_MODIF_ACCT	On the Modify Financial Account page, select the Account Relationships modification type	Use this page to change the relationship on an account.
Modify Account - Credit Card Parameters	RBF_MODIF_ACCT	On the Modify Financial Account page, select the Credit Card Parameters modification type	Use this page to change the limits on a credit card.
Modify Account - Currency	RBF_MODIF_ACCT	On the Modify Financial Account page, select the Currency modification type	Use this page to change the base currency of an account.
Modify Account - Product	RBF_MODIF_ACCT	On the Modify Financial Account page, select the Product modification type	Use this page to replace the current account product with a new product.
Modify Account - Status	RBF_MODIF_ACCT	On the Modify Financial Account page, select the Status modification type	Use this page to change the status of the account.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Modify Account - TIN Type and Number	RBF_MODIF_ACCT	On the Modify Financial Account page, select the TIN Type and Number modification type	Use this page to change the TIN type or number.
Reverse Transaction Fee	RBF_FEE_REVERSAL	On the 360-Degree View page, select <i>Reverse Transaction Fee</i> from the Go To drop-down list box. Click Go.	Use this page to reverse transaction fees that have been charged and paid.

## Modifying Account Fees

Access the Modify Account: Account Fee page (Customer Accounts, Modify Account, Modify Financial Account, select the Account Fee modification type).

**Transaction Type**                      Select the type of transaction to be modified.

**Account Fee**                              Enter the new account fee.

## Modifying Account Relationships

Access the Modify Account: Account Relationships page (Customer Accounts, Modify Account, Modify Financial Account, select the Account Relationships modification type).

**Action**                                      Select *Add* or *Delete* to change the account relationship.

**Customer**                                    Select the name of the customer to be added to or deleted from the relationship.

**Relationship Type**                      Select the type of relationship that is being modified. Relationship types are established in the Customer Data Model component.

## Modifying Credit Card Parameters

Access the Modify Account: Credit Card Parameters page (Customer Accounts, Modify Account, Modify Financial Account, select the Credit Card Parameters modification type).

**Total Limit**                                Enter the new total chargeable limit on the credit card.

**Cash Advance Limit**                      Enter the new total cash advance limit that is available on the credit card.

## Modifying the Currency

Access the Modify Account: Currency page (Customer Accounts, Modify Account, Modify Financial Account, select the Currency modification type).

**Currency Code** Enter the new base currency code for the account. Each account must be changed independently.

## Modifying the Product

Access the Modify Account: Product page (Customer Accounts, Modify Account, Modify Financial Account, select the Product modification type).

**Replacement Product** Select a replacement product for the current account. Options of the replacement product appear by default from the Product Relationship component.

## Modifying the Status

Access the Modify Account: Status page (Customer Accounts, Modify Account, Modify Financial Account, select the Status modification type).

**Status** Select the status of the account. Delivered values are *Closed, Hold, Inactive, Open, Pending Close, and Pending Open*.

## Modifying the TIN Type and Number

Access the Modify Account: TIN Type and Number page (Customer Accounts, Modify Account, Modify Financial Account, select the TIN Type and Number modification type).

**TIN Type** Select the new TIN type.

**Tax ID** Enter the new tax ID.

**Reason Code** Select a reason code for the change.

**Reason** Enter a reason for the change.

## Reversing Transaction Fees

Access the Reverse Transaction Fee page (select *Reverse Transaction Fee* from the Go To drop-down list box and click Go on the 360-Degree View page).

The agent can use the Reverse Transaction Fee page to reverse out fees that have already been charged and paid. All fields on this page are required.

## Chapter 17

# Understanding Case Management for Industries

This chapter discusses:

- Case management for financial services.
- Case management for insurance.
- Case management for communications.
- Case management for energy.
- Case management for government.
- Core functionality.

---

## Case Management for Financial Services

The case and solution functionality for the financial services solution is based on the case and solution functionality found in the PeopleSoft Call Center applications.

Some functionality has been configured for financial services business needs, including.

- Financial services case types.
- Billing Account and Financial Account searches.

## Case Types

PeopleSoft provides the following case types specifically for the financial services industries:

- Add/Modify ATM Card
- Close Account
- Complaint
- Fulfillment Request
- Pick-up / Drop-off
- Question/Problem

- Service Request

---

## Case Management for Insurance

The case and solution functionality for the insurance industry solution is based on the case and solution functionality found in the PeopleSoft Call Center applications.

Some functionality has been configured for insurance business needs, including.

- Insurance industry case types.
- Billing Account and Financial Account searches.

### Case Types

PeopleSoft provides the following case types specifically for the insurance industry:

- Claim Request
- Close Account
- Complaint
- Fulfillment Request
- Pick-up / Drop-off
- Question/Problem
- Service Request

---

## Case Management for Communications

The case and solution functionality for the communications industry solution is based on the case and solution functionality found in the PeopleSoft Call Center applications.

Some functionality has been configured for communications industry business needs, including.

- Communications industry case types.
- Account Number and Service Phone Number searches.

### Case Types

PeopleSoft provides the following case types specifically for the communications industry:

- Administrative Quest

- Bill Dispute
- Complaint
- Fraud
- Literature
- Product Defect
- Question or Problem
- Service Request

---

## Case Management for Energy

The case and solution functionality for the energy industry solution is based on the case and solution functionality found in the PeopleSoft Call Center applications.

Some functionality has been configured for energy industry business needs, including.

- Energy industry case types.
- Site-specific searches.

These searches include *Site Address*, *Site City*, *Site Country*, *Site State*, and *Site Postal*.

## Case Types

PeopleSoft provides the following case types specifically for the energy industry:

- Complaint
- Power Outage
- Bill Dispute
- Question
- Service Request

---

## Case Management for Government

The case and solution functionality for the government solution is based on the case and solution functionality found in the PeopleSoft Call Center applications.

Some functionality has been configured for government business needs, including.

- Government case types.

- Anonymous callers.

An anonymous caller is a person who does not provide a name when opening a case. An anonymous caller can be a guest user (a person not registered in the database) who reports an incident, or a registered user who does not have any personal data attached to the case. For an anonymous caller, no personal information is required before saving the case, and no personal information is saved in the database.

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**Note.** The anonymous caller can be used by any display template. It is enabled for government when delivered.

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- Incident location.

You can identify the location of an incident using an explicit street address or an intersection. If you use ESRI integration for mapping functionality, the system sends the address or intersection information to the ESRI system, which returns the latitude and longitude for the incident location. This enables you to view the location of the incident on the map when you click the Map Dashboard toolbar button. Incident location information is not required to save the case.

---

**Note.** The incident location can be used by any display template. It is enabled for government when delivered.

---

## Case Types

PeopleSoft provides the following case types specifically for government:

- Administrative Quest
- Biz Development
- Complaint
- Employment
- Events
- Legal Notice
- Literature Request
- Outside Jurisdiction
- Permit / Renewal
- Question
- Report Problem
- Report Tip
- Service Request
- Suggestion

## Core Functionality

The case functionality for all industry solutions is built on core CRM Call Center functionality. It is highly recommended that you review the following references before working with case management.

<b>Process</b>	<b>Details</b>	<b>More Information</b>
Define call center business units	<ul style="list-style-type: none"> <li>• Call Center business units.</li> <li>• Table set controls.</li> <li>• Defaults for industry solutions.</li> </ul>	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Defining Call Center Business Units and Display Template Options."
Set up call center prompt tables	<ul style="list-style-type: none"> <li>• Case status.</li> <li>• Case type.</li> <li>• Impact</li> <li>• Priority.</li> <li>• Severity.</li> <li>• Source.</li> <li>• Category/Type/Detail</li> <li>• Specialty types and Details.</li> <li>• Problem Type</li> <li>• Quick Code.</li> </ul>	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Setting Up Call Center Prompt Tables."
Manage cases	<ul style="list-style-type: none"> <li>• Case access.</li> <li>• Case creation.</li> <li>• Case retrieval.</li> <li>• Saved searches.</li> <li>• Case management activities.</li> </ul>	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Managing Cases."

<b>Process</b>	<b>Details</b>	<b>More Information</b>
Process Cases	<ul style="list-style-type: none"> <li>• Search for solutions</li> <li>• View the Case Summary page.</li> <li>• Add notes and attachments.</li> <li>• Manage related cases</li> <li>• Manage related actions.</li> <li>• Manage interested parties.</li> <li>• Record billing information.</li> <li>• Manage attributes</li> </ul>	<p>See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i>, "Processing Cases."</p>

## Chapter 18

# Working with Self Service Transactions for Insurance

This chapter provides an overview of self-service for the insurance industry and discusses how to:

- Work with PeopleSoft Customer Care transactions.
- Change policies.
- Browse catalogs to order products.
- Search for locations.
- Manage user profiles.
- Report a First Notice of Loss (FNOL).
- View claims.

---

## Understanding Self-Service Transactions for Insurance

This section lists prerequisites and discusses:

- Self-service view.
- Self-service access.

### Prerequisites

Much of the self-service functionality for insurance is based on core functionality for case and product catalog. Detailed information on setting up and managing self-service is available in these PeopleBook chapters:

<b>Process</b>	<b>Details</b>	<b>More Information</b>
Setting up customer self-service	<ul style="list-style-type: none"><li>• Define guest IDs.</li><li>• Set up user registration features.</li><li>• Set up Contact Us features.</li></ul>	See <i>and PeopleSoft CRM 9.1 Application Fundamentals PeopleBook</i> , "Setting Up Customer Self-Service."

<b>Process</b>	<b>Details</b>	<b>More Information</b>
Working with customer self-service	<ul style="list-style-type: none"> <li>• Sign in to PeopleSoft self-service.</li> <li>• Register as a personal user.</li> <li>• Maintain name and sign-in information.</li> <li>• Maintain a customer's contact and address information.</li> <li>• Maintain a customer's address book.</li> <li>• View internal contacts.</li> <li>• Send messages.</li> </ul>	See <i>and PeopleSoft CRM 9.1 Application Fundamentals PeopleBook</i> , "Working with Customer Self-Service Transactions."
Configuring self-service	<ul style="list-style-type: none"> <li>• Hide specific fields in self-service Case components.</li> <li>• Configure Contact Me notifications.</li> <li>• Associate solutions with reasons that self-service users provide for closing cases.</li> <li>• Update descriptions of the predefined searches that the users of Self Service components use.</li> <li>• Set up FAQs and troubleshooting guides.</li> </ul>	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Configuring Self-Service Applications."
Working with self-service transactions	<ul style="list-style-type: none"> <li>• Create a case.</li> <li>• Manage existing cases.</li> <li>• Search for solutions.</li> <li>• Use FAQs and troubleshooting guides.</li> </ul>	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Working with Self-Service Application Transactions."

## Self Service Management

The self-service menu enables the self-service user to perform these transactions:

<b>Menu Item</b>	<b>Description</b>
Customer Care	Create cases, view cases, search solutions, search frequently asked questions (FAQs), and view the troubleshooting guide.
Policy Administration	Modify policies.
Browse Catalog	View product catalogs, view information about product offerings, and request quotes online.
Search for Location	Find locations for specific products or services.
Profile	Change the username, password, default address, phone number, and email address; view and maintain an address book; and view internal contact information.
Customer Selection	Select the role for the current transaction.
Contact Us	Create an email that will be directed to the appropriate area in your organization.

## Self Service Access

Two types of self-service users can access your site:

- Guest users.
- Registered users.

### **Guest User Access**

When users first access the site, they are automatically logged in using the INSGUEST ID that is identified in your 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 ID and password to further identify themselves and get additional access. For example, a user who accesses the site as a guest can access the product catalog but cannot view order statuses. Once the user signs in, both the product catalog and order statuses are accessible. Even after users sign in with their own user IDs, the guest ID controls certain site characteristics, such as the site language.

If you have more than one guest ID, users can switch to a different one by selecting a value from the drop-down list box on the page. Depending on how you define guest IDs, the IDs may control the site language, the business unit whose data is displayed, or other site characteristics.

### Registered User Access

Visitors can register as personal users by clicking the Personal User Registration link and establishing a personal user ID. This prompts the system to create a consumer record for that person, and the registration causes the system to create a user ID that is associated with the new consumer record and that the visitor can use to sign in on subsequent visits to the site. The user ID is cloned from the guest ID that was active when the user registered. Menu navigation options and, in some cases, page appearance depend on the user's role or roles.

Users who forget their passwords can click the Password Hint link to request a new password.

---

## Working with PeopleSoft Customer Care Transactions

This section lists the pages that consumers use to work with customer care transactions.

See *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Working with Self-Service Application Transactions," Accessing Self-Service Transactions In PeopleSoft CRM and HCM. and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Working with Self-Service Application Transactions," Managing Existing Self-Service Application Cases. and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Working with Self-Service Application Transactions," Searching for Solutions. and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Working with Self-Service Application Transactions," Accessing FAQs. and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Working with Self-Service Application Transactions," Selecting and Running Troubleshooting Guides.

### Pages Used to Work with PeopleSoft Customer Care Transactions

Page Name	Definition Name	Navigation	Usage
Customer Care	RBF_MNU_CARE	Customer Care	Access PeopleSoft Customer Care transactions and case functionality.
Create Case	RCFCASE_SW_SS_RPT	On the Customer Care page, click the Create a New Case link	Create new Cases to file complaints, request information, and so on.
Search Cases	RCFCASE_SW_SS_SRCH	On the Customer Care page, click the Search Cases link	Search for cases that they created, view case information, view a complete description of the problem, view solutions that are associated with the case, and resume product applications that have been saved for later.
Search Solutions	RC_SOLNSRCH_SW_SS	On the Customer Care page, click the Search Solutions link	Search for solutions to cases.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
FAQ (Frequently Asked Questions)	RBT_FAQ_SOL_SS	On the Customer Care page, click the FAQ link	Search FAQs for a topic.
Troubleshooting Guide	RBT_TGUIDE_SS	On the Customer Care page, click the Troubleshooting Guide link	Access the troubleshooting guide for solutions.

---

## Changing Policies

This section lists the pages that consumers use to make policy changes online.

### Pages Used to Change Policies

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Policy Administration	RBI_MNU_POLICY	Click the Policy Administration link on the main menu	Access the Change Policy component.
Change Policy	RBI_CHG_POLICY_SS	Click the Change Policy link on the Policy Administration page	Change policies.

---

## Ordering Products Online

This section lists the pages that consumers use to order products online.

### See Also

*PeopleSoft CRM 9.1 Product and Item Management PeopleBook, "Creating Catalogs"*

### Pages Used to Browse Catalogs to Order Product

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Browse the Catalog	RB_CATALOG	Click the Browse Catalog link on the main menu	View the available catalogs.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Product Display	RB_CATALOG	Click a product catalog link on the Browse the Catalog page	View the products that are available in the selected catalog.
Product Comparison	RB_CATALOG	Select up to three products on the Product Display page. Click Add Selected to Compare Pad	Compare up to three products side by side. The system displays detailed descriptions for comparison purposes. You can choose to get a quote from this page.
Product Details	RBF_APPLY_SA_PG	Click the Purchase this Product link on the Product Comparison page Click the product name on the Product Comparison page	View the selected product's features, terms, and conditions. You can choose to get a quote from this page.

---

## Searching for Locations

This section list the page that consumers use to search for locations where specific products or services are available.

### Page Used to Search for Locations

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Search for Location	RBF_SITE_SRCH_SS	Click the Search for Location link on the main menu	Search for locations that offer specific products or services.

---

## Managing User Profiles

The section lists the pages that consumers use to manage user profiles.

### Pages Used to Manage User Profiles

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Profile	RX_PROFILE	Click the Profile link on the main menu	Access the user profile menu.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Name and Sign In	RX_NAME_SIGNIN	Click the Name and Sign In link on the Profile menu	Modify name and sign-in information.
Default Addresses	RX_PROFILE_DFLTS	Click the Default Addresses link on the Profile menu	View and modify default addresses.
Address Book	RX_ADR_CONSUMER	Click the Address Book link on the Profile menu.	Maintain address books.
Contact Directory	WC_CONTACT_DIR	Click the Internal Contacts link on the Profile menu	Maintain directories of internal contacts.

---

## Reporting an FNOL

The section lists the pages that consumers use to file a FNOL.

### See Also

[Chapter 4, "Setting Up Industry-Specific Functionality," Setting Up Online Application Forms for FNOL, page 26](#)

[Chapter 7, "Understanding the 360-Degree View for Industries," Transactions for the Insurance Industry, page 71](#)

## Pages Used to Report a FNOL

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Financial Account	RBF_FIN_ACCOUNT_SS	Click the policy number link on the My Policy pagelet	Review policy details.
Insurance Policy	RBI_POLICY_SS	Click the View Policy button on the Financial Account page	Review covered assets, coverages, deductibles, limits, and options for the selected policy.

---

## Viewing Claims

The section lists the page that consumers use to view claim details.

## Page Used to View Claims

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Review Claim	RBI_CLAIMHDR_SS_PG	Click the claim number on the Home page	Review claim details and access the case that is associated with the claim.

## Chapter 19

# Working with Self-Service Transactions for Financial Services

This chapter provides an overview of self-service transactions available for financial services and discusses how to:

- Work with Customer Care transactions.
- Administer accounts.
- Perform banking transactions.
- Search for locations.
- Manage user profile information.
- Select customers.

---

## Understanding Self-Service Transactions for Financial Services

The financial services solution enables you to deploy self-service administrative and financial transactions for your customers. These transactions provide access to personal account information and employ a simple interface that is suited to the casual, untrained user.

This section lists prerequisites and discusses:

- Self-service view.
- Self-service data access.
- Confirmation pages.

### Prerequisites

Much of the self-service functionality for financial services is based on core functionality for cases. Detailed information on setting up and managing self-service is available in the following PeopleBook chapters:

<b>Process</b>	<b>Details</b>	<b>More Information</b>
Setting Up Customer Self-Service	<ul style="list-style-type: none"> <li>• Define guest IDs.</li> <li>• Set up user registration features.</li> <li>• Set up Contact Us features.</li> </ul>	See <i>and PeopleSoft CRM 9.1 Application Fundamentals PeopleBook</i> , "Setting Up Customer Self-Service."
Working with Customer Self-Service	<ul style="list-style-type: none"> <li>• Sign in to PeopleSoft self-service.</li> <li>• Register as a personal user.</li> <li>• Maintain name and sign in information.</li> <li>• Maintain a customer's contact and address information.</li> <li>• Maintain a customer's address book.</li> <li>• View internal contacts.</li> <li>• Send messages.</li> </ul>	See <i>and PeopleSoft CRM 9.1 Application Fundamentals PeopleBook</i> , "Working with Customer Self-Service Transactions."
Configuring Self-Service	<ul style="list-style-type: none"> <li>• Hide specific fields in self-service Case components.</li> <li>• Configure "Contact Me..." notifications.</li> <li>• Associate solutions with reasons that self-service users provide for closing cases.</li> <li>• Update descriptions of the predefined searches that are used by the users of self-service components.</li> <li>• Set up FAQs and troubleshooting guides.</li> </ul>	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Configuring Self-Service Applications."
Working with Self-Service Transactions	<ul style="list-style-type: none"> <li>• Create a case.</li> <li>• Manage existing cases.</li> <li>• Search for solutions.</li> <li>• Use FAQs and troubleshooting guides.</li> </ul>	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Working with Self-Service Application Transactions."

## Self-Service View

The self-service menu enables the following transactions:

<i>Menu Item</i>	<i>Description</i>
Customer Care	Enables users to create new Cases, search Cases, search solutions, search frequently asked questions, and view the troubleshooting guide.
Account Administration	Enables users to change the account address or the account nickname.
Browse Catalog	Enables users to view information about product offerings and apply for products online.
Banking Transactions	Enables users to set up automatic funds transfers, initiate one-time funds transfers, reorder checkbooks, stop check payments, pay bills, order copies of checks or account statements, order foreign currency, order cashier's checks, and order traveler's checks.
Search for Locations	Enables users to search for service locations using specific search criteria.
Profile	Enables users to change the user name, password, default address, phone number, or email address, and to view and maintain an address book.
Customer Selection	Enables users to select roles for transactions.
Contact Us	Enables users to create emails that are directed to the appropriate area in the financial institution.

### See Also

*PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Configuring Self-Service Applications"

*PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Working with Self-Service Application Transactions"

## Self-Service Data Access

The customer view displays all data applicable to the customer in all roles.

Before users can perform financial transactions, they have to select the role they are using for the transaction. Only data and processes applicable to that role are available.

Pages are available to financial services employees through the 360-Degree View.

## Confirmation Pages

When self-service users perform transactions, the system provides a two-step confirmation to assure the user that the transaction was successful.

The user is asked to confirm the request. This provides the opportunity to view the request and to make changes if required.

At this point, the transaction can be canceled, and no changes will take place:

When the user confirms the transaction, the system displays a transaction confirmation with a confirmation number:

---

## Working with Customer Care Transactions

This section lists the pages that consumers use to work with customer care transactions.

See *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Working with Self-Service Application Transactions," Understanding Self-Service Transactions. and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Working with Self-Service Application Transactions," Searching for Solutions. and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Working with Self-Service Application Transactions," Managing Existing Self-Service Application Cases. and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Working with Self-Service Application Transactions," Selecting and Running Troubleshooting Guides.

## Pages Used to Work with Customer Care Transactions

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Customer Care	RBFC_MNU_CARE	Customer Care	Access Customer Care transactions.
Create Case	RCFCASE_SW_SS_RPT	On the Customer Care page, click the Create a New Case link	Create new cases to file complaints, request information, and so on.
Search Cases	RCFCASE_SW_SS_SRCH	On the Customer Care page, click the Search Cases link	Search for cases, view case information, view a complete description of the problem, and view solutions associated with the case.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Search Solutions	RC_SOLNSRCH_SW_SS	On the Customer Care page, click the Search Solutions link	Search for solutions to cases.
FAQ (Frequently Asked Questions)	RBT_FAQ_PG_SS	On the Customer Care page, click the FAQ link	Search FAQs for a topic.
Troubleshooting Guide	RBT_TGUIDE_SS	On the Customer Care page, click the Troubleshooting Guide link	Access the troubleshooting guide for solutions.

---

## Administering Accounts

This section lists the pages that consumers use to administer their accounts.

### Pages Used to Administer Accounts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Account Administration	RBF_MNU_ACCT	Account Administration	Select a self-service transaction.
Change Account Address	RBF_ACT_ADR_SS	Click the Change Account Address link on the Account Administration page	Change the address for accounts.
Change Account Nickname	RBF_ACCT_NICK_SS	Click the Change Account Nickname link on the Account Administration page	Change the nickname for accounts.

---

## Performing Banking Transactions

This section lists the pages consumers use to perform banking transactions.

### Pages Used to Perform Banking Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Banking Transactions	RBF_MNU_BANK	Banking Transactions	Select a self-service banking transaction.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Automatic Funds Transfer	RBF_AFND_TR_SS	Click the Automatic Funds Transfer link on the Banking Transactions page	Perform a recurring transfer of funds from one account to another. The currency is that of the sending (from) account.
Transfer Funds	RBF_TRN_FND_SS	Click the Transfer Funds link on the Banking Transactions page	Perform a one-time transfer of funds from one account to another. The currency is that of the sending (from) account.
Reorder Checkbook	RBF_REO_CHK_SS	Click the Reorder Checkbook link on the Banking Transactions page	Order new checks.
Stop Check Payment	RBF_STP_PAY_SS	Click the Stop Check Payment link on the Banking Transactions page	Stop payment on a specific check.
Bill Payment	RBF_PAYEE_DISP_SS	Click the Bill Payment link on the Banking Transactions page	Pay bills.
Order Copy of Check	RBF_ORD_CHK_SS	Click the Order Copy of Check link on the Banking Transactions page	Order a copy of a check that has been issued.
Order Copy of Statement	RBF_ORD_DOC_SS	Click the Order Copy of Statement link on the Banking Transactions page	Order a copy of the account statement.
Order Foreign Currency	RBF_ORD_FCUR_SS	Click the Order Foreign Currency link on the Banking Transactions page	Order foreign currency.
Order Cashier's Check	RBF_ORD_CCHK_SS	Click the Order Cashier's Check link on the Banking Transactions page	Order cashier's checks.
Order Traveler's Checks	RBF_ORD_TCHK_SS	Click the Order Traveler's Checks link on the Banking Transactions page	Order traveler's checks.

## Searching for Locations

This section lists the page consumers use to search for locations.

**See Also**

[Chapter 6, "Setting Up Sites and Service Locations," page 53](#)

**Page Used to Search for Locations**

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Search for Location	RBF_SITE_SRCH_SS	Click the Search for Location link on the Main Menu	Search for locations offering specific products or services.

**Managing User Profile Information**

This section lists the pages consumers use to access user profile information.

See *and PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Customer Self-Service."* and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Working with Customer Self-Service Transactions."*

**Pages Used to Manage User Profile Information**

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Profile	RX_PROFILE	Profile, Profile	Select a self-service transaction.
Name and Sign In	RX_NAME_SIGNIN	Click the Name and Sign In link on the Profile menu	Change your name or password.
Default Addresses	RX_PROFILE_DFLTS	Click the Default Addresses link on the Profile menu	Change your default address, phone number, or email address.
Address Book	RX_ADR_CONSUM_INFO	Click the Address Book link on the Profile menu	Create, delete, or edit addresses.
Internal Contacts	WC_CONTACT_DIR	Click the Internal Contacts link on the Profile menu	Create, delete, or edit internal contacts.

**Selecting Customers**

This section lists the page consumers use to select customers.

## Page Used to Select Customers

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Customer Selection	CUST_SELECT	Customer Selection	Select the customer you are representing for the transaction.

## Chapter 20

# Working with Self-Service Transactions for Communications and Energy

This chapter provides an overview of self-service transactions available for communications and energy and discusses how to:

- Manage accounts.
- Manage bills.
- Manage services.
- Work with customer care transactions.

---

## Understanding Self-Service Transactions for Communications and Energy

This section lists prerequisites and discusses:

- Self-service view.
- Viewing accounts

### Prerequisites

Much of the self-service functionality for communications and energy is based on core functionality for order capture. Detailed information on setting up and managing self-service is available in the following PeopleBook chapters:

<b>Process</b>	<b>Details</b>	<b>More Information</b>
Setting Up Customer Self-Service	<ul style="list-style-type: none"><li>• Define guest IDs.</li><li>• Set up user registration features.</li><li>• Set up Contact Us features.</li></ul>	See <i>and PeopleSoft CRM 9.1 Application Fundamentals PeopleBook</i> , "Setting Up Customer Self-Service."

<b>Process</b>	<b>Details</b>	<b>More Information</b>
Working with Customer Self-Service	<ul style="list-style-type: none"> <li>• Sign in to PeopleSoft self-service.</li> <li>• Register as a personal user.</li> <li>• Maintain name and sign in information.</li> <li>• Maintain a customer's contact and address information.</li> <li>• Maintain a customer's address book.</li> <li>• View internal contacts.</li> <li>• Send messages.</li> </ul>	See <i>and PeopleSoft CRM 9.1 Application Fundamentals PeopleBook</i> , "Working with Customer Self-Service Transactions."
Configuring Self-Service	<ul style="list-style-type: none"> <li>• Hide specific fields in self-service Case components.</li> <li>• Configure "Contact Me..." notifications.</li> <li>• Associate solutions with reasons that self-service users provide for closing cases.</li> <li>• Update descriptions of the predefined searches that are used by the users of self-service components.</li> <li>• Set up FAQs and troubleshooting guides.</li> </ul>	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Configuring Self-Service Applications."
Working with Self-Service Transactions	<ul style="list-style-type: none"> <li>• Create a case.</li> <li>• Manage existing cases.</li> <li>• Search for solutions.</li> <li>• Use FAQs and troubleshooting guides.</li> </ul>	See <i>and PeopleSoft CRM 9.1 Call Center Applications PeopleBook</i> , "Working with Self-Service Application Transactions."

## Self-Service View

The self-service menu enables the following transactions:

<b>Menu Item</b>	<b>Description</b>
Account Management	Account Administration enables the user to view accounts, bills, and services. <ul style="list-style-type: none"> <li>• The user can view account status, account information, account balance, and account usage.</li> <li>• The user can view bill details such as bill due date and total due for existing accounts.</li> <li>• The user can view service details such as account number and recurring price, and make changes to the services, such as adding and removing features.</li> </ul>
Customer Care	Customer Care enables the user to create trouble tickets, view tickets, search solutions, search Frequently Asked Questions and view the troubleshooting guide.
Browse Catalog	Products and Services enables the user to view product catalogs, view information about product offerings, and purchase products and services online.
Search Catalog	Catalog Search enables the user to perform a keyword search on product catalogs.
Shopping Cart	The Shopping Cart displays all products and services selected for purchase.
Order Status	Order Status displays details for all orders placed within a defined period of time. The number of review days is defined in Set Up CRM, Business Unit Related, Order Capture Definition.
Quote Status	Quote Status displays details for all quotes created within a defined period of time. The number of review days is defined in Set Up CRM, Business Unit Related, Order Capture Definition.
Profile	Profile enables the user to change the user name, password, default address, phone number, or email, view and maintain an address book, and view internal contact information.
Customer Selection	Customer Selection enables the user to select the role for the transaction.
Contact Us	Contact Us enables the user to create an email that will be directed to the appropriate area.

<i>Menu Item</i>	<i>Description</i>
Product Registration	Product Registration enables the user to register products online. Users can register new or existing products.

## Viewing Accounts

When an account is created, the following additional information is captured and preserved:

- If the account is for a consumer, the consumer's business object (BO) ID is stored in the customer BO ID.
- If the account is for a company, created by a contact of the company, the company's BO ID is stored in the Customer BO ID and the Contact's BO ID is stored in the Contact BO ID.

The accounts shown for a user are filtered by the same criteria as shown above, based on the selections in the Customer Selection option. If the current self-service user is a consumer, all the accounts belonging to that user are shown. If the current user is a contact, then only the accounts created by that user, for the company he is representing, will be shown.

The Get Balance link on the View Account Balance page sends a synchronous message to the billing system using Integration Broker, to fetch the account balance in real time. This synchronous functionality could be altered using the UNTEGRATBILL parameter, the communications configuration. There is similar functionality represented by the Get Usage link on the Account Usage display page.

---

## Managing Accounts

This section lists the pages that consumers use to manage accounts.

### Pages Used to Manage Accounts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Account Management	RBT_MNU_ACCT	Account Management, Account Management	Select a self-service transaction.
View Accounts	RBT_ACCT_VIEW_SS	On the Account Management page, click the View Accounts link	Self-service users search for accounts to view in greater detail.
Account Details	RBT_ACCOUNT_SS	On the View Accounts page, click the account number	Self-service users view details of individual accounts. Details include account number, account type, account name, and account status.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
View Account Balance	RBT_ACCT_BAL_SS	On the Account Details page, click the View Account Balance link	Self-service users view the current balance and opening balance of the account.
Bill Dispute	RBT_BILL_DISP_SS	On the View Account Balance page, click the Dispute Balance button.	Self-service users can dispute a bill appearing on the system.
View Account Usage	RBT_ACCT_USAGE_SS	On the Account Details page, click the View Account Usage link.	Self-service users view total time and current minutes used on an account.
Usage Dispute	RBT_ACCT_USAGE_SS	On the View Account Usage page, click the Dispute Usage button.	Self-service users can dispute usage on an account.
Change Payment Type	RBT_CHNGPAY_PG_SS	On the Account Details page, click the Change Payment Type button	Self-service users can change the payment type for the account. Delivered selections are <i>Invoice</i> , <i>Automatic Payment</i> and <i>Credit Card</i> . The user can select a different payment type for each account.

---

## Managing Bills

This section lists the pages that consumers use to manage bills.

### Pages Used to Manage Bills

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
View Bills	RBT_BILL_VIEW_SS	On the Account Management page, click the View Bills link	Self-service users select the account to view billing information.
View Bills	RBT_BILL_VIEW_SS	On the View Bills page, select the account number from the list and click Go	Self-service users view information such as bill due date and total due.
Bill Details	RBT_BILL_PG_SS	On the View Bills page, click the Bill Number link	Self-service users review details of the bill.
Bill Item Details	RBT_BILL_ITEM_SS	On the Bill Details page, click the Bill Detail Information link	Self-service users review individual line items from the bill.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Bill Dispute	RBT_BILL_DISP_SS	On the Bill Details page, click the Bill Dispute link.	Self-service users select a reason for the billing dispute. Delivered values are <i>Incorrect Balance</i> , <i>Billing Error</i> , or <i>Others</i> .  The self-service application user can only dispute a bill event, but a CSR can dispute a bill item.

---

## Managing Services

This section lists the pages that consumers use to manage services.

### Pages Used to Manage Services

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
View Services	RBT_SERV_VIEW_SS	On the Account Management page, click the View Services link	Self-service users select the account to view service information.
Service Details	RBT_SERV_PG_SS	On the View Services page, click the service number	Self-service users review features and associated pricing of the service.
Modify Your Service	RBT_MODIFY_SERV_SS	On the Service Details page, click the Change My Features button	Self-service users can add or remove features for the service.
Summary	RBT_SERVICE_MGMTSS	On the Modify Your Service page, click the Finish button	Self-service users can review the changes they made to the service and review the related pricing.

---

## Working with Customer Care Transactions

This section lists the pages that consumers use to work with customer care transactions.

The Trouble Ticket for communications and energy is based on core Case functionality. PeopleSoft has added the Account field to the Create Case component. Core functionality is used throughout the rest of the component.

## Pages Used to Work with Customer Care Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Customer Care	RBT_MNU_CASE	Customer Care, Customer Care	Select a self-service transaction.
Create Case	RCTCASE_SW_SS_RPT	On the Customer Care page, click Create Trouble Ticket.	Self-service users can create trouble tickets on any case.



## Appendix A

# Delivered Web Services and Service Operations

This appendix discusses the delivered web services and service operations for the financial service industries.

---

## Delivered Web Services

This section discusses:

- The financial account web service.
- The policy web service.
- The claims web service.
- The at risk web service.
- How to view the message elements.

### **See Also**

*PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Business Processes and Web Services"

## Financial Account Web Service

The Financial Account (RBF\_FINACCOUNT) web service is available with the following operations:

- Create Account

Takes financial account data as input and creates a financial account record and associated child records in the CRM system.

- Get Account

Returns a financial account record and its associated child record based on a passed unique identifier.

- Search Account

Returns a list of financial account records and the associated child records based on criteria field values passed via the input message.

- Update Account

Modifies the attributes of the financial account data structure.

- Change Account Address

Takes the account number and new address data as input and changes the address in the CRM system for that account.

This table provides the technical names, operation type, and messages names of the service operations that are related to the web services:

<b>Service Operation</b>	<b>Operation Type</b>	<b>Request Message</b>	<b>Response Message</b>
Create Account (RBF_FINACCOUNT_CREATE)	Synchronous	RBF_FINACCOUNT_CREATE_REQ	RBF_FINACCOUNT_CREATE_RES
Get Account (RBF_FINACCOUNT_GET)	Synchronous	RBF_FINACCOUNT_GET_REQ	RBF_FINACCOUNT_GET_RES
Search Account (RBF_FINACCOUNT_SEARCH)	Synchronous	RBF_FINACCOUNT_SEARCH_REQ	RBF_FINACCOUNT_SEARCH_RES
Update Account (RBF_FINACCOUNT_UPDATE)	Synchronous	RBF_FINACCOUNT_UPDATE_REQ	RBF_FINACCOUNT_UPDATE_RES
Change Account Address (RBF_FINACCOUNT_ADDRESS)	Synchronous	RBF_FINACCOUNT_ADDRESS_REQ	RBF_FINACCOUNT_ADDRESS_RES

## Policy Web Service

The Policy (RBI\_POLICY) web service is available with the following operations:

- Create Policy

Takes insurance policy data as input and creates an insurance policy record and associated child records in the CRM system.

- Get Policy

Returns a policy record and its associated child record based on a passed unique identifier.

- Search Policy

Returns a list of policy records and their associated child records based on criteria field values passed via the input message.

- Update Policy

Modifies the attributes of the policy structure.

This table provides the technical names, operation type, and messages names of the service operations that are related to the web services:

<b>Service Operation</b>	<b>Operation Type</b>	<b>Request Message</b>	<b>Response Message</b>
Create Policy (RBI_POLICY_CREATE)	Synchronous	RBI_POLICY_CREATE_REQ	RBI_POLICY_CREATE_RES
Get Policy (RBI_POLICY_GET)	Synchronous	RBI_POLICY_GET_REQ	RBI_POLICY_GET_RES
Search Policy (RBI_POLICY_SEARCH)	Synchronous	RBI_POLICY_SEARCH_REQ	RBI_POLICY_SEARCH_RES
Update Policy (RBI_POLICY_UPDATE)	Synchronous	RBI_POLICY_UPDATE_REQ	RBI_POLICY_UPDATE_RES

## Claims Web Service

The Claim (RBI\_CLAIM) web service is available with the following operations:

- Create Claim

Takes claim related data as input and creates a claim record and associated child records in the CRM system

- Update Claim

Takes claim information as input and updates the claim data in the CRM system.

This table provides the technical names, operation type, and messages names of the service operations that are related to the web services:

<b>Service Operation</b>	<b>Operation Type</b>	<b>Request Message</b>	<b>Response Message</b>
Create Claim (RBI_CLAIM_CREATE)	Synchronous	RBI_CLAIM_CREATE_REQ	RBI_CLAIM_CREATE_RES
Update Claim (RBI_CLAIM_UPDATE)	Synchronous	RBI_CLAIM_UPDATE_REQ	RBI_CLAIM_UPDATE_RES

## At Risk Web Service

The At Risk (RBW\_RISK ) web service contains the Create Client at Risk operation, which provides the ability to add an At Risk record for an existing wealth management client.

The Create Client at Risk operation assumes the user enters the BO\_ID and ROLE\_TYPE\_ID to identify the client, as well as the RISK\_REASON,RISK\_PRIORITY, and RISK\_STATUS codes that are to be associated to that client. If the RISK\_REASON is *Lost*, then a value is also expected for the LOST\_REASON element. The financial summary information for the specified client is calculated and returned in the response message.

This table provides the technical names, operation type, and messages names of the service operations that are related to the web service:

<b>Service Operation</b>	<b>Operation Type</b>	<b>Request Message</b>	<b>Response Message</b>
Create Client at Risk (RBW_CREATE_RISK )	Synchronous	RBW_RISK_REQ	RBW_RISK_RESP

## Viewing the Message Elements

You can view the elements and fields that are included in each operation message through PeopleTools.

To view a list of field names and aliases for a particular message:

1. Select PeopleTools, Integration Broker, Integration Setup, Messages.
2. Enter *RBW*, *RBW*, or *RBI* in the Message Name field and click Search.

The system lists all the messages that are related to financial services or insurance.

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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