PeopleSoft Portal Pack 9.1 PeopleBook

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Contents

Oracle's PeopleSoft CRM Portal Pack Preface

This preface discusses:

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

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Application Fundamentals

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

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

- CRM Multi-Product Foundation

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

- Workforce Management

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

- Interactions and 360-Degree Views

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

- Self-Service for Customers

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

- Relationship Management

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

- Entitlement Management

  This part discusses setting up agreements and warranties.

- SmartViews

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

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Getting Started"

PeopleSoft Industry Application Fundamentals

The *PeopleSoft CRM 9.1 Industry Application Fundamentals PeopleBook* discusses configuration options including security and financial account administration common to PeopleSoft vertical solution applications.

The *PeopleSoft CRM 9.1 Industry Application Fundamentals PeopleBook*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 about:

- Industry-specific tables.
- Industry-specific set IDs and roles.
- Products for industries.
- Arrangements and contracts.
- Industry-specific business objects.
- Application security for financial services.
- Financial accounts.
- Churn management.
- Fraud management.

See Also

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

PeopleSoft Automation and Configuration Tools

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

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

- Correspondence Management

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

- Automation Tools

  This part discusses PeopleSoft CRM workflow, the Active Analytics Framework, business projects, and scripts.

- Configuration Tools

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

- Knowledge Management

  This part discusses Verity search setup.

- Business process management

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

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

See Also

PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook, "Getting Started"

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.

See Also

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

PeopleSoft Business Object Management

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

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

- Business Object Management Basics.

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

- Data Management for Organization Business Objects.

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

- Data management for Individual Business Objects.

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

- Business Object Management.

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

- Customer and Worker Data Integrations.

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

See Also

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

PeopleTools PeopleBooks

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

PeopleBooks and the PeopleSoft Online Library

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

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

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

Chapter 1

Getting Started with PeopleSoft CRM Portal Pack

This chapter provides overviews of the PeopleSoft CRM Portal Pack and PeopleSoft CRM Portal Pack implementation.

PeopleSoft CRM Portal Pack Overview

PeopleSoft CRM Portal Pack provides a collection of pagelets that can be individually selected to appear on a corporate intranet or extranet homepage. The individual pagelets provide information that is gathered from various PeopleSoft CRM applications.

PeopleSoft CRM Portal Pack Implementation

PeopleSoft CRM Portal Pack does not require table-loading implementation steps.

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

See Also

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

Chapter 2

Understanding PeopleSoft CRM Portal Pack

This chapter discusses:

- PeopleSoft CRM Portal Pack.
- Customer Selection page.
- PeopleSoft CRM Portal Pack pagelets.
- PeopleSoft CRM Pagelet Wizard pagelets.
- Web libraries.

Understanding PeopleSoft CRM Portal Pack

PeopleSoft CRM Portal Pack is a collection of portal pagelets for corporate intranet or extranet homepages that provides access to key data and transactions within PeopleSoft CRM applications for use in the employee and customer portal registries. The portal pack supplements the PeopleSoft CRM applications that provide the underlying data.

When you install PeopleSoft CRM Portal Pack, your users can personalize their portal homepages by adding the pagelets that they need. Standard PeopleSoft system role-based security ensures that users can access only the pagelets that are appropriate to their roles. You click the Content link (located above the left navigation menu) to access a list of role-appropriate pagelets.

Users can configure their portal homepages with three narrow columns or one narrow and one wide column. Some pagelets have both a narrow and a wide version, each with its own object name. You click the Layout link (located above the left navigation menu) to modify pagelet layout. When this documentation provides two object names for a pagelet, the first one refers to the narrow version.

To use the pagelets in PeopleSoft CRM Portal Pack, you must first install the enabling CRM application. The CRM pagelets and the enabling application are listed in the PeopleSoft CRM Portal Pack Pagelets section of this document.

You can also design your own pagelets when your installation includes PeopleSoft CRM Portal Pack.

See Also

PeopleTools 8.52: PeopleTools Portal Technologies PeopleBook

Audience

The PeopleSoft CRM Portal Pack pagelets are targeted for specific functional roles, which generally fit into three audiences (which mirror the different portal registries):

- Employee
- Customer
- Partner

Pagelet Security

You control pagelet security at the component level by associating it with a permission list, which is then associated with a role; each pagelet has its own component to enable more granular access. You can ascertain a pagelet's component name in PeopleSoft Application Designer by searching for definition references to the page's system (or object) name.

Pagelets are grouped into functional roles as an example of how to organize access. You need to create the proper permission lists and associate them with actual role definitions before your users can access them, or use the permission list definitions that are provided in the delivered system data. The PeopleSoft system also delivers sample roles that you can use as an example of how to set up pagelet access.

Here is an example of some of the roles that include access to PeopleSoft CRM Portal Pack pagelets:

- Call center agent
- Customer
- Consumer
- Broker
- Field sales representative
- Help desk agent
- Guest

See Also

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

Pagelet Personalization

Some pagelets require that you first select default settings on a related customer selection page prior to using the pagelet. The system retrieves the transactional information that is associated with the selection to display in the pagelet.

To configure a pagelet, you click the Customize button:

Customize button

If you don't specify values on a pagelet's customer selection page, the pagelet does not display any data. Pagelets that do not have configuration options do not display this button.

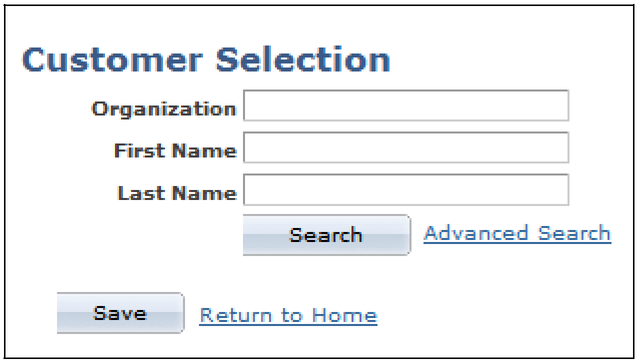
Each of the following pagelets provide information about a specific type of customer interaction, such as sales leads, support cases, and service orders. Collectively, these pagelets provide a 360-degree view of your organization's relationship with the customer. Many of these pagelets provide links that enable you to navigate to further details about the interactions; some enable you to add new interaction information:

- Agreements
- Installed Products
- RMA
- Recent Interactions
- Recent Leads
- Recent Support Cases
- Recent Service Orders
- Recent Opportunities
- Relationship Grid

Note. You must first select a customer or contact by using the Customer Selection page. After you identify the customer or contact, the other configurable pagelets display information that is related to that customer or contact.

Customer Selection Page

You use the Customize button to select the customer, consumer, or contact for the information that you want to view. When you click the Customize button, the system displays the Customer Selection page:



Customer Selection page

Enter search criteria and click the Search button to select the customer, consumer, or contact for whom you want to view interaction information. After you select a customer, consumer, or contact and save your selection, information that is related to your selection appears on the configurable pagelets until you make another selection.

PeopleSoft CRM Portal Pack Pagelets

This section lists the pagelets that make up PeopleSoft CRM Portal Pack and identifies:

- The audience for the pagelet: employees or customers.

  The audience also identifies the portal registry where the pagelet is registered.

- The role of the person who uses the pagelet.

  These are functional roles, not delivered PeopleTools roles.

- The pagelet's enabling application.

  The enabling application provides the information that appears in the pagelet.

Pagelet Name	***Audience***	***Functional Role***	***Enabling Application***
Accounts CR_RBT_SERV_PGT_COMP_COM	Customer	Customer, consumer, or broker	PeopleSoft Bill Presentment and Account Management
Catalog Search RX_PROD_SRCH_PGT	Customer	Customer, consumer, or broker	PeopleSoft Order Capture Self Service
My Accounts CR_RBF_CUST_ACT_PGT_FIN	Customer	Customer or consumer	PeopleSoft Banking Transactions

Pagelet Name	***Audience***	***Functional Role***	***Enabling Application***
My Information CR_RBT_INFO_SS_COM	Customer	Customer, consumer, or broker	PeopleSoft Order Capture Self Service
My Information CR_RBF_CUST_CONT_PGT_FIN	Customer	Customer, consumer	PeopleSoft Banking Transactions
My Reports RC_CASE_SW_SS_RPT.GBL	Customer	Customer	Any PeopleSoft CRM application
Recent Cases RC_SS_SW, RC_SS_SW_W	Customer	Customer, consumer, or broker	PeopleSoft Support Self Service
Recent Orders RE_C_QUO_PGT	Customer	Customer, consumer, or broker	PeopleSoft Order Capture
Recent Quotes RE_C_ORD_PGT	Customer	Customer, consumer, or broker	PeopleSoft Order Capture
Services RBT_SERV_PGT	Customer	Customer, consumer, or broker	PeopleSoft Order Capture Self Service
Shopping Cart RE_CART_PGT	Customer	Customer, consumer, or broker	PeopleSoft Order Capture
Site Selection RX_LANG_SEL_PGLTL	Customer	Guest user	PeopleSoft Order Capture
Quotes RBI_CUST_QUOTE_PGT	Customer	Customer, consumer, or broker	PeopleSoft Policy and Claims Presentment
Claims RBI_CUST_CLAIM_PGT	Customer	Customer, consumer, or broker	PeopleSoft Policy and Claims Presentment

Pagelet Name	***Audience***	***Functional Role***	***Enabling Application***
Agreements RI_PE_AGREEMENT_GBL	Employee	Customer service representative	PeopleSoft Support or PeopleSoft Integrated FieldService
Catalog Search RX_PROD_SRCH_PGT	Employee	Employee	PeopleSoft Order Capture Self Service
CRM Chart 1, 2, and 3 (iScript)	Employee	Manager or employee	PeopleSoft Support, PeopleSoft Order Capture
CRM Worklist PE_WRKLST_PGT	Employee	Employee	Any PeopleSoft CRM application
Installed Products PE_PROD_PGT	Employee	Customer service representative	Any PeopleSoft CRM application
My Forecast REP_FCAST_PGT	Employee	Salesperson	PeopleSoft Sales
My Leads PRTL_LEADS_PGT	Employee	Salesperson	PeopleSoft Sales
My Monthly Calendar PRTL_CAL_MTH_PGT	Employee	Salesperson	PeopleSoft Sales
My Opportunities PRTL_OPP_PGT	Employee	Salesperson	PeopleSoft Sales
My Reports PT_PSRF_REPRT_PAGELET_GBL	Employee	Employee	Any PeopleSoft CRM application
My Tasks RSF_PRTL_ACTLIST_PGT	Employee	Salesperson	PeopleSoft Sales

Pagelet Name	***Audience***	***Functional Role***	***Enabling Application***
My Call Reports	Employee	Salesperson, marketing representative, field service agent, customer service representative	PeopleSoft Wealth Management
Recent Interactions RI_PE_REC_INT_PGT	Employee	Customer service representative	Any PeopleSoft CRM application
Recent Service Orders RI_PE_SO_PGT	Employee	Customer service representative	PeopleSoft Integrated FieldService
Recent Support Cases PE_SUPPORT_PGT	Employee	Customer service representative	PeopleSoft Support
Relationship Grid CR_RI_REL_GRID_PGT_GBL	Employee	Employee	Any PeopleSoft CRM application
RMA RI_PE_RMA_PGT	Employee	Customer service representative	PeopleSoft Support
Self Service Help Desk RC_SS_HD, RC_SS_HDW	Employee	Employee	PeopleSoft HelpDesk

PeopleSoft CRM Pagelet Wizard Pagelets

Pagelet Wizard provides a user-friendly, browser-based graphical user interface that guides you through a series of steps to create and publish a pagelet. The following pagelets that are available with the CRM Portal Pack were built using the Pagelet Wizard feature: EOPP_CREF_BY_DATE_ID, RC_CASES_AVG_AGE, RC_CASES_BY_PRIORITY, RC_CASES_BY_SOURCE, RC_CASES_CLOSED_FIRSTCONTACT, RC_CASES_CREATED_CLOSED, RO_PRT_MGR_ORD, RO_PRT_MGR_QUO, RO_PRT_REP_ORD, and RO_PRT_REP_QUO.

The primary users of these pagelets are call center agents and managers and sales representatives and managers.

Authorized users can easily modify and maintain these pagelets using the Pagelet Wizard.

See Also

"Using Pagelet Wizard to Create and Manage Pagelets" chapter in *PeopleTools 8.52: PeopleTools Portal Technologies PeopleBook*

Web Libraries

These are the web libraries that are associated with CRM pagelet functionality. You must ensure that users have access to the proper web libraries for the pages they need to access.

See *PeopleTools 8.52: PeopleTools Portal Technologies PeopleBook*

Web Library Name	***Owner***	***Description***
WEBLIB_CAL_SYNC	RB	Starfish - Used for XML Link synchronization for the Calendar and Task items, between PeopleSoft and Starfish.
WEBLIB_CAMPAIGN	RA	Marketing - Campaign Viewer code
WEBLIB_IMAGEMAP	RGB	Demo - Image map processing demo - first one is server side, second one is client side.
WEBLIB_RB	RB	Web Library record for Integration and Technology
WEBLIB_RBF_MENU	RFB	Industry - Used in 8.1 for FSI application to transfer to a particular page upon log in. It has not been used from 8.4 onwards.
WEBLIB_RC	RC	Call Center - This derived record holds all the code for the Charts.
WEBLIB_RF	RF	FieldService - Business Interlink Defn
WEBLIB_RI	RI	Interaction Management - iScript Pagelet Search
WEBLIB_RS_SCHD	FRS	This code uses iScript and generates the HTML Table for the calendar page;
WEBLIB_SU	RB	JustTalk - WebLib for JustTalk Single User synchronization.

Chapter 3

Working with CRM Employee-Facing Pagelets

This chapter provides an overview of employee-facing pagelets and discusses how to:

- Use employee-facing pagelets common to CRM applications.
- Use PeopleSoft Sales pagelets.
- Use PeopleSoft Support pagelets.
- Use PeopleSoft Integrated FieldService pagelets.
- Use PeopleSoft Client Management pagelets.

Understanding Employee-Facing Pagelets

Employee-facing pagelets enable employees to view and update their own information and view customer information. Pagelets that display customer or contact information can be configured by using the Customize button.

Using Employee-Facing Pagelets Common to CRM Applications

This section discusses how to use the CRM employee pagelets that are common to the PeopleSoft CRM applications.

Pagelets Used to View Customer Information

This table describes the pagelets that you use to view information about a customer:

Pagelet	***Usage***	***For More Information***
Installed Products	Displays the product ID and quantity of each product installed at a customer's site and provides a link to the product ID details.	See and *PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Tracking Installed Products."

Pagelet	***Usage***	***For More Information***
Recent Interactions	Lists the most recent interactions that a customer has had with your organization and provides a link to the details.	See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Working with Interactions."
Self Service Help Desk	Enables users to review their own cases.	See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Working with Customer Self-Service Transactions."
CRM Worklist	Enables users to see a summary of their worklist items and supports navigation to individual worklist items.	See and *PeopleSoft CRM 9.1 Automation and Configuration Tools PeopleBook*, "Setting Up PeopleSoft CRM Workflow."
Relationship Grid	Provides a view of the relationships that a customer has with other customers or contacts in the database.	See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Interactions and 360-Degree Views."

Using PeopleSoft Sales Pagelets

PeopleSoft Sales offers several pagelets to help sales representatives manage their sales activities. The system includes pagelets for each of the major sales objects—leads, opportunities, and forecasts—plus pagelets for managing sales tasks. This section discusses how sales representatives manage their sales activities by using the pagelets.

Pagelets Used to View Sales Activities

This table describes the pagelets used to view sales activities:

Pagelet	***Usage***	***For More Information***
My Forecast	Displays at-a-glance estimates of future sales revenues for sales opportunities.	See and *PeopleSoft Sales 9.1 PeopleBook*, "Managing Sales Leads and Opportunities." See and *PeopleSoft Sales 9.1 PeopleBook*, "Using Forecasts."

Pagelet	**Usage**	**For More Information**
My Leads	Displays the three most recent leads based on the date and time that the lead was added.	See and *PeopleSoft Sales 9.1 PeopleBook*, "Managing Sales Leads and Opportunities."
My Monthly Calendar	Displays your calendar for the current month. You can enter new task information or update existing tasks on your calendar.	See and *PeopleSoft Sales 9.1 PeopleBook*, "Creating Sales Tasks and Adding Notes for a Lead or Opportunity." See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Using Calendars."
My Opportunities	Displays the opportunity name, customer, telephone number, and status of your three most recently added sales opportunities and provides a link to the details page, where you can edit the opportunity information.	See and *PeopleSoft Sales 9.1 PeopleBook*, "Managing Sales Leads and Opportunities."
My Tasks	Displays a list of upcoming tasks from your calendar.	See and *PeopleSoft Sales 9.1 PeopleBook*, "Creating Sales Tasks and Adding Notes for a Lead or Opportunity."

Using PeopleSoft Support Pagelets

This section discusses how to use the pagelets that PeopleSoft Support enables.

Pagelets Used to View Support Cases

This table describes the pagelets used to view support cases:

Pagelet	**Usage**	**For More Information**
Agreements	Displays a summary list of a customer's existing service or support contract agreements and the status of each, and provides a link to the details of the agreement definition.	See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Managing Agreements and Warranties."

Pagelet	*Usage*	*For More Information*
RMA	Displays a list of a customer's return material authorizations (RMAs), provides a link to the RMA details, and provides an Add link to create a new RMA.	See and *PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Tracking Installed Products."
Recent Support Cases	Displays a list of a customer's recent support cases, provides a link to the case details, and provides an Add link to create a new support case. **Note.** When you add a case from the Recent Support Cases pagelet, the case uses the default display template based on the user preferences.	See and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Managing Cases."

Using PeopleSoft Integrated FieldService Pagelets

This section discusses the pagelets that PeopleSoft Integrated FieldService activities enable.

Pagelets Used to View Agreements and Service Orders

This table describes the pagelets used to view agreements and service orders:

Pagelet	*Usage*	*For More Information*
Agreements	Displays a summary list of a customer's existing service or support contract agreements and the status of each, and provides a link to the details of the agreement definition.	See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Managing Agreements and Warranties."
Recent Service Orders	Displays a list of a customer's recent service orders, provides a link to the service order details, and provides an Add link to create a new service order.	See and *PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Creating and Managing Service Orders."

Using PeopleSoft Client Management Pagelets

This section discusses the pagelets that PeopleSoft Client Management enables.

PeopleSoft CRM Client Management offers all the tools necessary for a Financial Advisor (FA) to successfully manage clients. When an FA enters the Client Management application, the FA sees a summary of top clients, referrals, clients at risk, today's tasks, opportunities, and the FA's calendar.

Pagelets Used to Manage Client Activity

This table describes the pagelets used to manage client activity:

Pagelet	***Usage***	***For More Information***
My Calendar	Displays the calendar entries of the person for that day. A maximum of five entries are displayed. FAs can expand to view all. Tasks that do not have a start time are not displayed in the My Calendar pagelet. Additional calendar entries can be created from this pagelet.	See and *PeopleSoft Client Management 9.1 PeopleBook*, "Managing Clients."
My Top Clients	Displays the top five clients that the FA owns. The top clients are determined by the sum of all the financial accounts for each client. This list excludes inactive clients. The system displays either the Holding field or the Revenue field. The Configuration Parameter field on the Wealth Management Setup page determines which field to display.	See and *PeopleSoft Client Management 9.1 PeopleBook*, "Managing Clients."
My Referrals	Displays up to five referrals that are assigned to the user. A referral is denoted as belonging to an FA if the FA is listed as the assigned to value on that referral.	See and *PeopleSoft Client Management 9.1 PeopleBook*, "Managing Clients," Managing Referrals.
My Clients at Risk	Displays the clients assigned to the user that are at risk of leaving. A maximum of five appear. The at-risk criteria are predefined. Additionally, customers can create their own rules to define what denotes a client at risk.	See and *PeopleSoft Client Management 9.1 PeopleBook*, "Managing Clients," Viewing Risk Summary Information.

Pagelet	***Usage***	***For More Information***
My Tasks	Displays the tasks of the logged-in user for the current day. The only tasks that appear here are those with a due date of today; these tasks do not display on the calendar. A total of five tasks appear. Users can expand to view all.	See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*, "Working with Tasks."
My Opportunities	Referrals are converted into opportunities. An opportunity is a potential customer.	See and *PeopleSoft Sales 9.1 PeopleBook*, "Managing Leads and Opportunities."

Chapter 4

Working with PeopleSoft CRM Charts

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

- Define chart names and labels.
- View CRM charts.
- Personalize charts.

Understanding CRM Charts

This section discusses:

- CRM chart pagelets.
- Delivered charts.

CRM Chart Pagelets

Three identical pagelets, CRM Charts 1 through 3, provide charts that give users valuable snapshots of their operations. Each chart pagelet can be configured to show summary information, details, or both:

- Summary charts show the total number of cases that meet a chart's selection criteria during a specified time period.
- Detail charts divide the time period into smaller units and provide subtotals for each period.
- Combined charts show a summary chart followed by a detail chart.

Position the mouse over a chart (over the bar representing the charted data) to display pop-up text with information about the underlying data.

Delivered Charts

The PeopleSoft system delivers charts that display call center and order capture data. When you set up charts, you can change the chart names and the labels that are used for the x- and y-axes on the chart.

PeopleSoft Support Charts

This table describes charts used for Call Center data:

Chart Name	*Description*
Case Backlog	The number of new cases created during the specified time period minus the number of cases closed during the specified time period. This number is determined based on the Date Created and Date Closed fields in the case. Note that this number may be negative if more cases are closed than created.
Cases Resolved by the First Call	The number of cases closed on the first call during a specified time period. This number is determined based on the Resolved by First Contact field in the case.
Cases with Links to Resolutions	The number of new cases that are resolved. Cases are considered resolved if they are associated with a solution and the solution status is *Resolution Successful.* This chart differs from the Problem Reports Closed chart because resolving a case does not necessarily close the case.
High Priority Cases	The number of high-priority cases created during the specified time period. This number is determined based on the Priority field in the case. (All priorities are associated with one of three priority types: *high, medium,* or *low*.) Cases are counted regardless of the current status, so this chart might include high-priority cases that are closed. The system evaluates the priority at the time that the chart fetches the data; cases for which the priority has changed from *high* to another value are not included in the count.
New Problem Reports	The number of cases created during the specified time period. This number is determined based on the Date Created field in the case.
Problem Reports Closed	The number of cases closed during the specified time period. This number is determined based on the Date Closed field. (All statuses are associated with one of three status categories: *open, closed,* or *cancelled.*)

PeopleSoft Order Capture Charts

This table describes charts used for Order Capture data:

Chart Name	***Description***
Captures on Hold	The number of captures created during the specific time period whose current status is *Hold.*
New Orders	The number of sales orders created during the specific time period.
New Quotes	The number of quotes created during the specific time period.

See Also

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

PeopleSoft CRM 9.1 Order Capture Applications PeopleBook, "Managing Orders and Quotes"

Defining Chart Names and Labels

This section discusses how to define chart names and labels.

Page Used to Define Chart Names and Labels

Page Name	***Definition Name***	***Navigation***	***Usage***
Chart Setup	RB_CHART_SETUP	Set Up CRM, Common Definitions, Chart Setup	Configure labels for the charts that the PeopleSoft system delivers. You access these charts through the CRM Charts pagelets.

Defining Chart Names and Labels

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

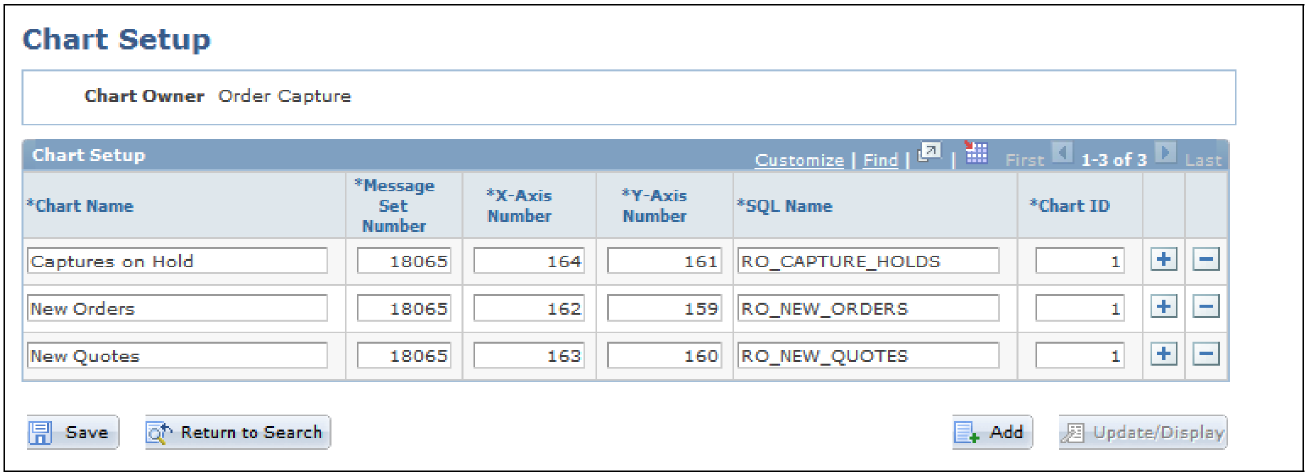


Chart Setup page

This page lists the charts that the PeopleSoft system delivers.

Chart Name

Enter the name to be used as the label in the chart pagelet. When users select which chart to display, they see the name entered here.

Message Set Number, X-Axis Number, and **Y-Axis Number**

Labels for the x- and y-axes in the chart come from the message catalog. Enter the message set number where the labels are stored, and enter separate message numbers for the x-axis label and the y-axis label.

SQL Name

Enter the name of the PeopleTools SQL object that populates the chart.

Chart ID

Enter the chart ID used to set parameters for the selected SQL program. The charts that the PeopleSoft system delivers use chart ID *1,* which is appropriate for charts that display numbers of objects (for example, the number of cases or orders) over time.

Viewing CRM Charts

This section discusses how to view the CRM chart pagelets.

Viewing the CRM Chart Pagelets

Use these pagelets to review metrics related to your call center and order capture operations:

Examples of CRM charts 1 through 3

All of the pagelets present data in bar charts:

- A detail bar chart displays a bar for each included time period.
- A summary bar chart displays one bar for the actual data and another bar for a gauge.

  The gauge is divided into low (green), middle (yellow), and high (red) zones for easy evaluation of the chart data. Users set low, middle, and high ranges when they personalize the page.

The pagelets also display the following text information:

- The chart name (for example, Case Backlog) appears at the top of the pagelet.
- The business unit appears in parentheses after the chart name.
- A text summary of the number of cases and the included time period appears under the bar graph.

Personalizing Charts

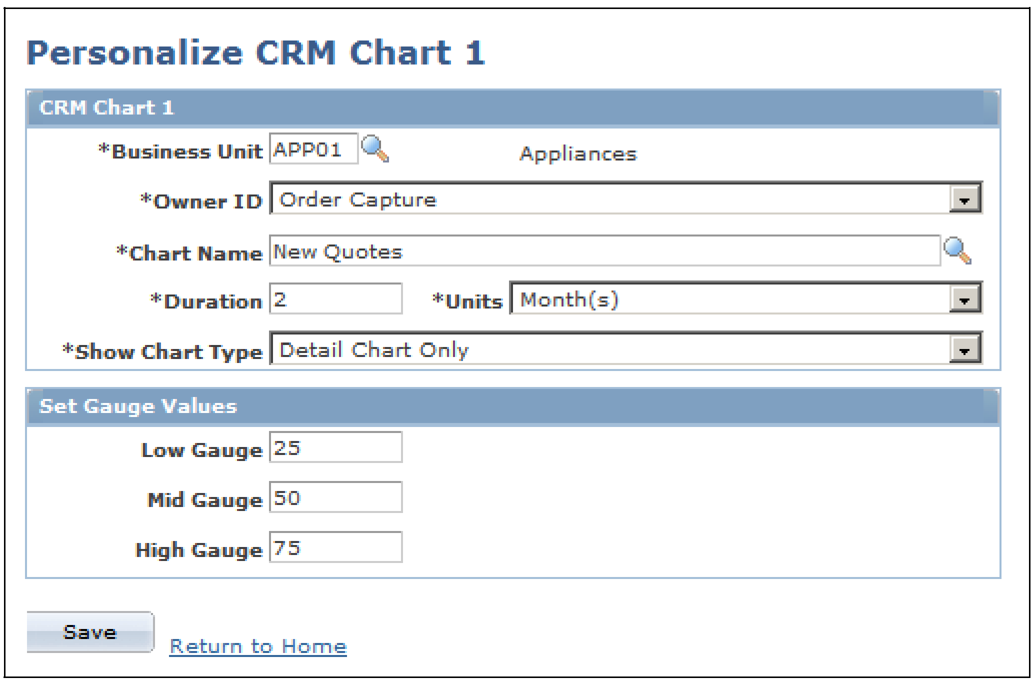
This section discusses how to personalize CRM chart pagelets.

Page Used to Personalize Charts

Page Name	*Definition Name*	*Navigation*	*Usage*
Personalize Summary Chart	RB_CHART_1, RB_CHART_2, RB_CHART_3	Click the Customize button for the pagelet to be personalized (CRM charts 1 through 3).	Select a chart and its display options.

Personalizing CRM Chart Pagelets

Access the Personalize CRM Chart page (click the Customize button for the pagelet to be personalized (CRM charts 1 through 3).



Personalize CRM Chart page

Business Unit Enter the business unit to be charted.

Owner ID Select the owner of the chart. Values are: *Call Center* and *Order Capture.*

Chart Name Select a chart associated with the selected owner ID.

Duration and Units	Select the number of days, hours, months, or weeks to be included in the chart data. You can show up to 24 hours, 7 days, 16 weeks, or 12 months of data.
Show Chart Type	Select a chart type. Values are: *Detail Chart Only, Summary Chart Only,* and *Summary and Detail Chart.*
Low Gauge Value, Mid Gauge Value, and **High Gauge Value**	Enter the top number for the low, middle, and high ranges in the gauge that appears in a summary chart. The gauge appears alongside the actual data. The gauge is strictly informational; it does not affect underlying data. Gauges appear only in summary charts; ignore these fields if the chart type is *Detail Chart Only.*

Chapter 5

Working with PeopleSoft CRM Self-Service Pagelets

This chapter provides an overview of self-service pagelets and discusses how to:

- Use PeopleSoft Order Capture Self Service pagelets.
- Use PeopleSoft Support pagelets.
- Use PeopleSoft pagelets for the financial services industry.
- Use PeopleSoft pagelets for the communications and energy industries.
- Use PeopleSoft pagelets for the insurance industry.

Understanding Self-Service Pagelets

Customer-facing pagelets enable customers, consumers, and brokers who are registered users of the system to view and update their own information. Unregistered users can see some pagelets, such as Catalog Search, Shopping Cart, and Site Selection. The Site Selection pagelet is available to unregistered or guest users for the purposes of navigating multiple sites.

See Also

PeopleSoft CRM 9.1 Application Fundamentals PeopleBook, "Self-Service for Customers"

Using PeopleSoft Order Capture Self-Service Pagelets

This section discusses how customers manage their personal information and shopping orders, select websites, and search catalogs by using the following pagelets.

Pagelets Used to View Customer Information

This table describes the pagelets used to view customer information:

Pagelet Name	***Usage***	***For More Information***
Catalog Search	Customers can search a specified catalog or all catalogs based on keywords.	See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "PeopleSoft Order Capture Self Service." See and *PeopleSoft CRM 9.1 Product and Item Management PeopleBook*, "Creating Catalogs."
My Information	Customers can view the name, address, phone number, and email address that are associated with a user who is signed in to the system.	See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* , "Self-Service for Customers."
Shopping Cart	Displays the number of products along with the order subtotal of a customer's shopping cart. Provides the customer with a direct link to checkout.	See and *PeopleSoft CRM 9.1 Order Capture Applications PeopleBook*, "PeopleSoft Order Capture Self Service."
Site Selection	Guest users can select a website if multiple sites are implemented. Switches a user to the selected site.	See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* , "Self-Service for Customers."
Recent Orders	Customers can view recent orders by order number, order date, and status, and they can link directly to order details.	See and *PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Creating and Managing Service Orders."
Recent Quotes	Customers can view recent quotes by quote number, quote date, and status, and they can link to quote details.	See and *PeopleSoft Integrated FieldService 9.1 PeopleBook*, "Creating and Managing Service Orders."

Using PeopleSoft Support Pagelets

This section discusses how customers can review their support cases and search for solutions by using the Recent Cases pagelet.

Pagelet Used to View Recent Cases

This table describes the pagelets used to view recent cases:

Pagelet Name	***Usage***	***For More Information***
Recent Cases	Customers can view the five most recent open cases and access pages for reviewing existing cases, creating new cases, and searching for case solutions. **Note.** The pagelet has a slightly different appearance, depending on whether it is placed in a narrow or a wide column on the portal homepage.	See and *PeopleSoft CRM 9.1 Call Center Applications PeopleBook*, "Managing Cases." See and *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* , "Working with Customer Self-Service Transactions."

Using PeopleSoft Pagelets for the Financial Services Industry

This section discusses how to use the pagelets that PeopleSoft CRM enables for the financial services industry.

Pagelets Used to View Account Information

This table describes the pagelets used to view account information:

Pagelet Name	***Usage***	***For More Information***
My Accounts	Customers can view accounts and associated products, including account balance, currency, and the date and time that the account was created.	See and *PeopleSoft CRM 9.1 Industry Application Fundamentals PeopleBook* , "Working with Financial Accounts."
My Information	Customers can view their personal information, such as name, address, phone number, and email address.	See and *PeopleSoft CRM 9.1 Industry Application Fundamentals PeopleBook* , "Working with Financial Accounts."

Using PeopleSoft Pagelets for the Communications and Energy Industries

This section discusses how to use the pagelets that PeopleSoft CRM enables for the communications and energy industries.

Pagelets Used to View Accounts and Services

This table describes the pagelets used to view accounts and services:

Pagelet Name	Usage	For More Information
Accounts	Customers can view a list of their accounts and account status, and they can link to account details.	See and *PeopleSoft Bill Presentment and Account Management 9.1 PeopleBook*, "Managing Accounts and Viewing Bills in the Communications and Energy Industries."
Services	Customers can view and change service details.	See and *PeopleSoft Bill Presentment and Account Management 9.1 PeopleBook*, "Managing Accounts and Viewing Bills in the Communications and Energy Industries."

Using PeopleSoft Pagelets for the Insurance Industry

This section discusses how customers can view their insurance quotes and claims.

Pagelets Used to View Quotes and Claims

This table describes the pagelets used to view quotes and claims:

Pagelet Name	Usage	For More Information
Quotes	Displays insurance quotes for a customer.	See and *PeopleSoft Policy and Claims Presentment 9.1 PeopleBook*, "Working with Policy and Claims Presentment Self-Service."
Claims	Displays insurance claims for a customer.	See and *PeopleSoft Policy and Claims Presentment 9.1 PeopleBook*, "Working with Policy and Claims Presentment Self-Service."

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