
PeopleSoft CRM 9.2: Business Object Management

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PeopleSoft CRM 9.2: Business Object Management
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Contents

Preface: Preface.....	xiii
Understanding the PeopleSoft Online Help and PeopleBooks.....	xiii
PeopleSoft Hosted Online Help.....	xiii
Locally Installed Help.....	xiii
Downloadable PeopleBook PDF Files.....	xiii
Common Help Documentation.....	xiv
Field and Control Definitions.....	xiv
Typographical Conventions.....	xiv
ISO Country and Currency Codes.....	xv
Region and Industry Identifiers.....	xv
Translations and Embedded Help.....	xvi
Using and Managing the PeopleSoft Online Help.....	xvi
PeopleSoft CRM Related Links.....	xvi
Contact Us.....	xvi
Follow Us.....	xvii
Chapter 1: Getting Started with CRM Business Object Management.....	19
CRM Business Object Management Overview.....	19
CRM Business Object Integrations.....	19
CRM Business Object Implementation.....	20
Chapter 2: Understanding Business Object Relationship Model Components.....	21
Business Object Relationship Modelling.....	21
BORM Architecture.....	21
Business Object Components.....	21
Roles.....	22
Relationships.....	22
Customers and Business Contacts.....	23
Contact Information for Business Objects.....	23
Business Object Searches.....	24
Basic Data Tables.....	24
Business Object Profiles.....	25
Chapter 3: Defining Control Values for Business Objects.....	27
Understanding Business Object Controls.....	27
Business Object Types.....	27
Role Types and Role Categories.....	28
Relationship Types and Relationship Categories.....	30
Contact Information Entries.....	32
Contact Method Types and Contact Method Purpose Types.....	33
Component Transfer Navigation.....	34
Defining Business Object and Name Types.....	35
Pages Used to Define Business Object and Name Types.....	35
Business Object Type Page.....	36
Business Object Name Type Page.....	36
Defining Role Types and Role Categories.....	37
Pages Used to Define Role Types and Categories.....	37
Role Type Page.....	38
Role Category Page.....	41

Defining Relationship Types and Relationship Categories.....	42
Pages Used to Define Relationship Types and Relationship Categories.....	42
Relationship Type Page.....	43
Relationship Category Page.....	45
Configuring Address Books.....	45
Page Used to Configure Address Books.....	46
Address Book Configuration Page.....	46
Setting Up Contact Methods.....	47
Pages Used to Set Up Contact Methods.....	47
Contact Method Use Page.....	47
Contact Method Type Page.....	47
Contact Method Purpose Type Page.....	50
Defining Component Transfer Navigation.....	51
Pages Used to Define Component Transfer Navigation.....	51
Component Navigation - Description Page.....	52
Defining Segment Codes.....	53
Page Used to Define Segment Codes.....	53
Segment Code Page.....	53
Defining Industries.....	53
Page Used to Define Industries.....	53
Industry Page.....	53
Defining National ID Types.....	54
Page Used to Define National ID Types.....	54
National Identification Type Page.....	54
Defining Customer Groups.....	55
Page Used to Define Customer Groups.....	55
Customer Group Table Page.....	55
Defining Customer Data Management System Options.....	56
Page Used to Define Customer Data Management System Options.....	56
Customer Data Management System Options Page.....	56
Defining Basic Data Mappings.....	58
Pages Used to Define Basic Data Mappings.....	59
Basic Data Mapping Page.....	59
Basic Data Mapping Cloning Page.....	60
Chapter 4: Defining Name and Address Information for Business Objects.....	63
Understanding Name and Address Information in CRM.....	63
Common Elements Used to Define Basic Data Mappings.....	63
Business Object Names in PeopleSoft CRM.....	64
Address Books in CRM.....	64
Contact Information on CRM Components.....	64
Updating Name Information.....	66
Pages Used to Update Name Information.....	66
More Names Page.....	67
Managing Summary Contact Information.....	67
Pages Used to Manage Summary Contact Information.....	67
Maintaining Contact Information for Business Objects.....	68
Pages Used to Maintain Contact Information.....	68
Contact Info Page.....	69
Address Book Page.....	70
Address Search Result List Page.....	71
Update Address Page.....	72

Update Phone Page.....	74
Update Email Page.....	75
Defining Customer Contacts.....	76
Pages Used to Define Customer Contacts.....	76
Maintaining the Contact List.....	76
Create Contact of <object> Page.....	77
Defining Customer Sites.....	80
Pages Used to Define Sites.....	80
Sites Page.....	80
Chapter 5: Defining Purchasing Options for Companies, Consumers, and Sites.....	83
Understanding Purchasing Options.....	83
Defining Purchasing Options for Customers.....	84
Pages Used to Define Purchasing Options for Customers.....	84
Purchasing Info Page.....	84
Selecting Purchasing Options for Customer Addresses.....	87
Pages Used to Select Purchasing Options for Customer Addresses.....	87
Contact Info Page.....	87
Selecting Purchasing Options for Customer Contacts.....	88
Pages Used to Select Purchasing Options for Customer Contacts.....	88
Contact Info Page.....	89
Maintain Contact Page.....	89
Selecting Purchasing Options for Customer Sites.....	89
Pages Used to Select Purchasing Options for Customer Sites.....	89
Contact Info Page.....	90
Chapter 6: Defining Tax Exempt Certificate Information for Companies, Consumers and Sites.....	91
Understanding Tax Exempt Certificates.....	91
Working with Tax Exempt Certificate Information.....	91
Page Used to Work with Tax Exempt Certificate Information.....	91
Tax Exempt Certificate Page.....	91
Chapter 7: Working with Business Object Profiles.....	93
Understanding Profiles.....	93
Profile Data in the CDM.....	95
Common Elements Used When Working With Profiles.....	95
Specifying a Profile Prefix.....	96
Page Used to Specify a Profile Prefix.....	96
Profile Setup Page.....	96
Creating a Profile Request.....	96
Pages Used to Create a Profile Request.....	97
Understanding Profile Requests.....	97
Profile Page.....	97
Profile Fields - Field Summary Page.....	99
Profile Fields - Field Detail Page.....	102
Modifying Active Profiles.....	103
Profile - Marketing Center Page.....	104
Registering a Profile.....	105
Pages Used to Register a Profile.....	107
Profiles Page.....	107
Profile Registration - Profile Page.....	108
Profile Registration - Profile Fields Page.....	109
Setting Up Profile Groups.....	111

Pages Used to Set Up Profile Groups.....	111
Define Profile Group Page.....	111
Define Profile Group - Add Profile Field Page.....	112
Assign Profile Group Display Page.....	112
Assign Profile Group Display - Edit Condition Page.....	113
Viewing and Updating Profile Data.....	114
Pages Used to View and Update Profile Data.....	114
More Info Page.....	115
Inserting and Updating Rows in Profiles.....	115
Page Used to Insert and Update Rows in Profiles.....	115
Manage Profile Updates Page.....	115
Chapter 8: Working with the Relationship Viewer.....	121
Understanding the Relationship Viewer.....	121
Purpose of the Relationship Viewer.....	121
Types of Relationships.....	121
Implicit and Explicit Relationships.....	122
Roles in the Relationship Viewer.....	122
PeopleSoft CRM Sample Relationship Views.....	122
Configuring Relationship Views.....	123
Page Used to Configure Relationship Views.....	123
Configure Relationship Views Page.....	124
Configuring the Relationship Viewer.....	125
Pages Used to Configure the Relationship Viewer.....	126
Role Type - Default Views Page.....	126
Role Priority - Role Priorities Page.....	128
Viewing and Maintaining Relationships and Roles.....	128
Pages Used to View and Maintain Relationships and Roles.....	128
Relationship Viewer Page.....	129
Maintain Roles Page.....	130
Chapter 9: Defining Company Business Objects.....	133
Understanding the Company Component.....	133
Company Information.....	133
Defining Company Information.....	134
Pages Used to Define Company Information.....	134
Company Search Page.....	135
Company - Summary: Summary Page.....	135
Company - Summary: Details Page.....	136
Company - Account Team Page.....	140
Company - Tasks Page.....	140
Company - Call Reports Page.....	140
Company - Notes Page.....	140
Company - Contact Info Page.....	140
Company - Relationships Page.....	141
Company - More Info Page.....	141
Company - Tax Exempt Certificate Page.....	141
Defining Company Sites.....	142
Pages Used to Define Company Sites.....	142
Defining Company Contacts.....	142
Pages Used to Define Company Contacts.....	143
Modeling Corporate Hierarchy.....	143
Pages Used to Model Corporate Hierarchy.....	143

Understanding Corporate Hierarchy.....	143
Understanding Corporate Hierarchy Participation Percentages.....	144
Corporate Hierarchy Page.....	144
Corporate Hierarchy: Extract Hierarchy Page.....	145
Chapter 10: Defining Site Business Objects.....	147
Understanding Sites.....	147
Setting Up Site Types.....	148
Page Used to Set Up Site Types.....	148
Maintaining General Site Information.....	148
Pages Used to Maintain General Site Information.....	148
Site - Site: Primary Page.....	149
Site - Site: Name Page.....	151
Site - Site: Purchasing Info Page.....	151
Site - Site: Tax Exempt Certificate Page.....	151
Site - Contact Info Page.....	151
Site - Notes Page.....	152
Maintaining Site Contacts.....	152
Pages Used to Define Site Contacts.....	152
Defining Site Relationships.....	152
Viewing Installed Products for a Site.....	152
Pages Used to View Installed Products for a Site.....	152
Chapter 11: Defining Person Business Objects.....	153
Understanding Persons.....	153
Sources of Person Information.....	153
Persons.....	153
Consumers and Contacts.....	154
Workers.....	156
Persons of Interest.....	156
Configuring the Person Component.....	156
Pages Used to Configure the Person Component.....	157
Configure Person Component Page.....	157
Person of Interest Type Page.....	159
Defining Person Information.....	159
Pages Used to Define Person Information.....	160
Person (<Role>) - Person: Primary Page.....	161
Person (<Role>) - Person: Details Page.....	164
Person (<Role>) - User Profiles Page.....	164
Person (<Role>) - Person: Credit Cards Page.....	166
Person (<Role>) - Tasks page.....	167
Person (<Role>) - Call Reports Page.....	167
Person (<Role>) - Notes Page.....	168
Person (<Role>) - Contact Info Page.....	168
Person (<Role>) - Relationships Page.....	168
Person (<Role>) - More Info Page.....	168
Defining Information for Business Contacts.....	168
Pages Used to Define Information for Business Contacts.....	168
Defining Consumer Information.....	169
Pages Used to Define Consumer Information.....	169
Person (Consumer) - Person: Tax Exempt Certificate Page.....	169
Person (Consumer) - Person: Purchasing Page.....	170
Person (Consumer) - Account Team Page.....	170

Person (Consumer) - Contact Info Page.....	171
Defining Person of Interest Information.....	171
Chapter 12: Defining Workers.....	173
Understanding Workers in CRM.....	173
Workforce Administration.....	173
Options for Creating Workers.....	174
Job Information and Effective Dates.....	175
Creating Workers.....	177
Pages Used to Create Workers.....	177
Prerequisites.....	178
Add Worker: Select Creation Method Page.....	178
Add Worker: Select Data to Copy Page.....	179
Create Worker Page.....	180
Maintaining Worker Information.....	181
Pages Used to Maintain Worker Information.....	182
Worker - Worker: Primary Page.....	183
Worker - Worker: Details Page.....	184
Worker - Worker: User Profiles Page.....	185
Worker - Job: Job Details Page.....	187
Worker - Job: Job Summary Page.....	190
Worker - Work Schedule Page.....	190
Worker - Skills and Competencies Page.....	191
Worker - Assignment Criteria Page.....	192
Worker - Groups Page.....	195
Worker - Storage Locations Page.....	196
Worker - Signature Page.....	198
Setting Up Foundational Data for Workers.....	198
Pages Used to Set Up Foundational Data for Workers.....	199
Location Page.....	199
Department Page.....	199
Job Codes Page.....	200
Cost Categories Page.....	201
Competencies Page.....	201
Chapter 13: Working with Predefined Business Object Search and Quick Create Data.....	203
Understanding Delivered System Data for BO Search and Quick Create.....	203
Field Definitions.....	203
Quick Create Definitions and Templates.....	211
Search Roles.....	211
Search Definitions.....	211
Criteria Fields.....	211
Adapter Definitions.....	211
Chapter 14: Using Business Object Search and Quick Create Functionality.....	213
Understanding the Business Object Search and Quick Create Process.....	213
Business Object Search.....	213
Customer Identification.....	213
Quick Create Functionality.....	214
BO Search and Quick Create Runtime Example.....	214
Searching for Business Objects.....	215
Pages Used to Search for Business Objects.....	215
Customer Information Subpage.....	215
Search For <object> Page.....	216

Creating Business Objects by Using the Quick Create Component.....	218
Page Used to Create Business Objects by Using Quick Create Functionality.....	218
Create <Quick Create Definition Name> Page.....	218
Chapter 15: Setting Up Business Object Search and Quick Create.....	223
Understanding BO Search and Quick Create Setup.....	223
Common Elements for BO Search and Quick Create Setup.....	223
BO Search Runtime Processes.....	224
BO Search and Quick Create Setup.....	225
Delivered Definitions.....	225
Adding and Modifying BO Search and Quick Create Definitions.....	225
Pages Used to Add or Modify Search Definitions.....	226
Field Page.....	227
Role Page.....	229
Search Record Page.....	230
Template Page.....	231
Relationships Page.....	233
Quick Create Page.....	234
Search Role Page.....	235
Search Page.....	239
Criteria Page.....	242
Adapter Page.....	243
Sections Page.....	245
Defining Labels.....	248
Chapter 16: Defining Ad Hoc Business Objects.....	249
Understanding Ad Hoc Business Objects.....	249
Defining Ad Hoc Business Objects.....	249
Pages Used to Define Ad Hoc Business Objects.....	250
Business Object - Business Object Page.....	250
Business Object - Relationships Page.....	250
Chapter 17: Managing Enterprise Integration for PeopleSoft CRM.....	251
Understanding Enterprise Integration Technology.....	251
EIPs in PeopleSoft CRM.....	251
PeopleSoft CRM Foundation EIPs.....	253
Application Messages.....	258
Data Mapping for Application Messages.....	259
Integration with PeopleSoft HCM, PeopleSoft Campus Solutions or Third-Party HR Data.....	260
Person Basic Fullsync and Person Basic Sync.....	260
Workforce Fullsync and Workforce Sync.....	263
Campus Solutions EIPs.....	264
Pers POI Sync.....	264
Customer Data Model EIP Sequence.....	264
Implementation Using Fullsyncs.....	265
Data Integrations.....	266
Customer and Contact Data Integration with PeopleSoft FSCM.....	266
Worker Data Integration with Third-Party Systems.....	270
Product Data Integration.....	271
Bill and Payment Data Integration.....	272
Performance Considerations.....	273
Setting Up Defaults for Integrating Customer and Contact Information.....	274
Pages Used to Set Up Default Values for Integrating Customer and Contact Information.....	274
Collector Page.....	275

Credit Analyst Page.....	275
Support Team Code Page.....	275
Interface Defaults Page.....	275
Name Type Options Page.....	276
General Options Page.....	277
Market-Enabling Company, Consumer, Site, and Contact EIPs.....	277
Pages Used to Market-Enable Company, Consumer, Site, and Contact EIPs.....	277
Market Control Codes Page.....	277
Market Installation Options Page.....	278
Build CDM Interface Records Page.....	278
Establishing Master ID Databases.....	279
Pages Used for Establishing Master ID Databases.....	279
Prerequisites.....	279
Master ID DB Setup Page.....	279
XML Test Utility Page.....	279
Mapping Message Data to PeopleSoft CRM Records and Fields.....	281
Page Used to Map Message Data to PeopleSoft CRM Records and Fields.....	281
Message Data Mapping Page.....	281
Chapter 18: Importing Data into PeopleSoft CRM.....	287
Understanding the Data Import Application Engine Process (RBIMPORT).....	287
Prerequisites.....	287
Data Import Process Steps.....	287
Matching SQL.....	289
When to Use the Basics AE Process to Load Basic Data.....	289
Setting Up Data Import Global Settings.....	290
Page Used to Set Up Data Import Global Settings.....	290
Data Import Global Setup Page.....	290
Defining Data Import Templates.....	292
Pages Used to Define Data Import Templates.....	293
Data Import Page.....	293
Data Import - Step 1: Define Import Template Page.....	294
Data Import - Step 2: Define Import File Page.....	296
Data Import - Step 3: Mapping Page.....	298
Specify Concatenation Page.....	301
Data Import - Step 4: Matching Page.....	301
Save Confirmation Page.....	303
Editing Matching SQL.....	303
Pages Used to Edit Matching SQL.....	303
Edit Matching SQL Page.....	304
Edit SQL page for Data Import Page.....	304
Running the Data Import Application Engine Process (RBIMPORT).....	304
Pages Used to Run the Data Import Application Engine Process (RBIMPORT).....	305
Data Import Page.....	305
Viewing the Data Import Process Status.....	308
Pages Used to View the Data Import Process Status.....	308
Data Import Page.....	309
View Import Statistics Page.....	309
Viewing the Data Import Process Error File.....	309
Running the Basics AE Process.....	310
Page Used to Run the Basics AE Process.....	310
Understanding the Basics AE Process.....	310

Disabling Unnecessary Roles, Relationships, and Contact Methods.....	311
Optimizing the Database for Performance.....	312
Application Engine Request Page.....	313

Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Online Help

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Online Help website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted online help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Online Help website is available in English only.

Note: Only the most current release of hosted online help is updated regularly. After a new release is posted, previous releases remain available but are no longer updated.

Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Online Help website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Elasticsearch for full-text searching. See *PeopleTools Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Elasticsearch, see the documentation for your chosen search engine.

Note: See [Oracle Support Document 2205540.2 \(PeopleTools Elasticsearch Home Page\)](#) for more information on using Elasticsearch with PeopleSoft.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search field. For instructions, go to your locally installed PeopleSoft Online Help site and select About This Help, Managing Locally Installed PeopleSoft Online Help, Enabling the Search Button and Field in the Contents sidebar.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

<i>Typographical Convention</i>	<i>Description</i>
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.

<i>Typographical Convention</i>	<i>Description</i>
& (ampersand)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>
⇒	<p>This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.</p>

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
- PeopleSoft Online Help accessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

PeopleSoft CRM Related Links

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[PeopleSoft Business Process Maps \(Microsoft Visio format\)](#)

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Send your suggestions to PSOFT-INFODEV_US@ORACLE.COM. Please include release numbers for the PeopleTools and applications that you are using.

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Getting Started with CRM Business Object Management

CRM Business Object Management Overview

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

CRM provides:

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

CRM Business Object Integrations

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

- Integration with PeopleSoft Human Capital Management or other similar systems enables you to synchronize CRM employee records with the system of record for human resources (HR) data.
- Integration with PeopleSoft Supply Chain Management (SCM) or other similar systems enables you to synchronize customer data that is required for applications within CRM such as Sales, Field Service, and Order Capture.
- Integration with SCM and Financial Management Solutions enables billing information and payment information that is associated with customers to appear in the PeopleSoft CRM 360-Degree View.
- The Credit Card EIP (enterprise integration point) enables you to integrate with third-party credit card authorization and payment vendors in Support and the collaborative selling applications.

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

CRM Business Object Implementation

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

- A list of components that you must set up.

This list is the order in which you must set up the components and enter data into them.

- Links to the corresponding documentation.

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

See *Application Fundamentals*.

Other Sources of Information

In the planning phase of implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines.

See also product documentation for *PeopleTools: Component Interfaces* and *PeopleTools: Setup Manager*.

Chapter 2

Understanding Business Object Relationship Model Components

Business Object Relationship Modelling

These topics discuss:

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

BORM Architecture

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

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

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

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

Business Object Components

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

- Company
- Site

- Person
- Worker

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

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

Related Links

[Understanding the Company Component](#)

[Understanding Persons](#)

[Understanding Sites](#)

[Understanding Ad Hoc Business Objects](#)

[Understanding Workers in CRM](#)

Roles

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

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

Related Links

[Defining Role Types and Role Categories](#)

[Understanding the Relationship Viewer](#)

Relationships

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

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

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

Related Links

[Defining Relationship Types and Relationship Categories](#)

[Understanding the Relationship Viewer](#)

Customers and Business Contacts

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

See [Understanding Purchasing Options](#).

Key Performance Indicators

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

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

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

Related Links

[Business Object Relationship Modelling](#)

[Defining Customer Contacts](#)

[Understanding Sites](#)

[Understanding Name and Address Information in CRM](#)

[Defining Customer Contacts](#)

[Mapping Message Data to PeopleSoft CRM Records and Fields](#)

[Understanding Enterprise Integration Technology](#)

Contact Information for Business Objects

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

When you implement the Customer Relationship Management system, you designate how many contact info entries are available for each organization and individual business object type. At run time, users

of the system can select which entry is the primary contact information for the business object and can update the contact methods that is associated with each entry. The primary information appears on component pages.

Related Links

[Understanding Name and Address Information in CRM](#)

[Understanding Sites](#)

[Understanding Persons](#)

Business Object Searches

Business object searches:

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

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

Related Links

[Understanding Delivered System Data for BO Search and Quick Create](#)

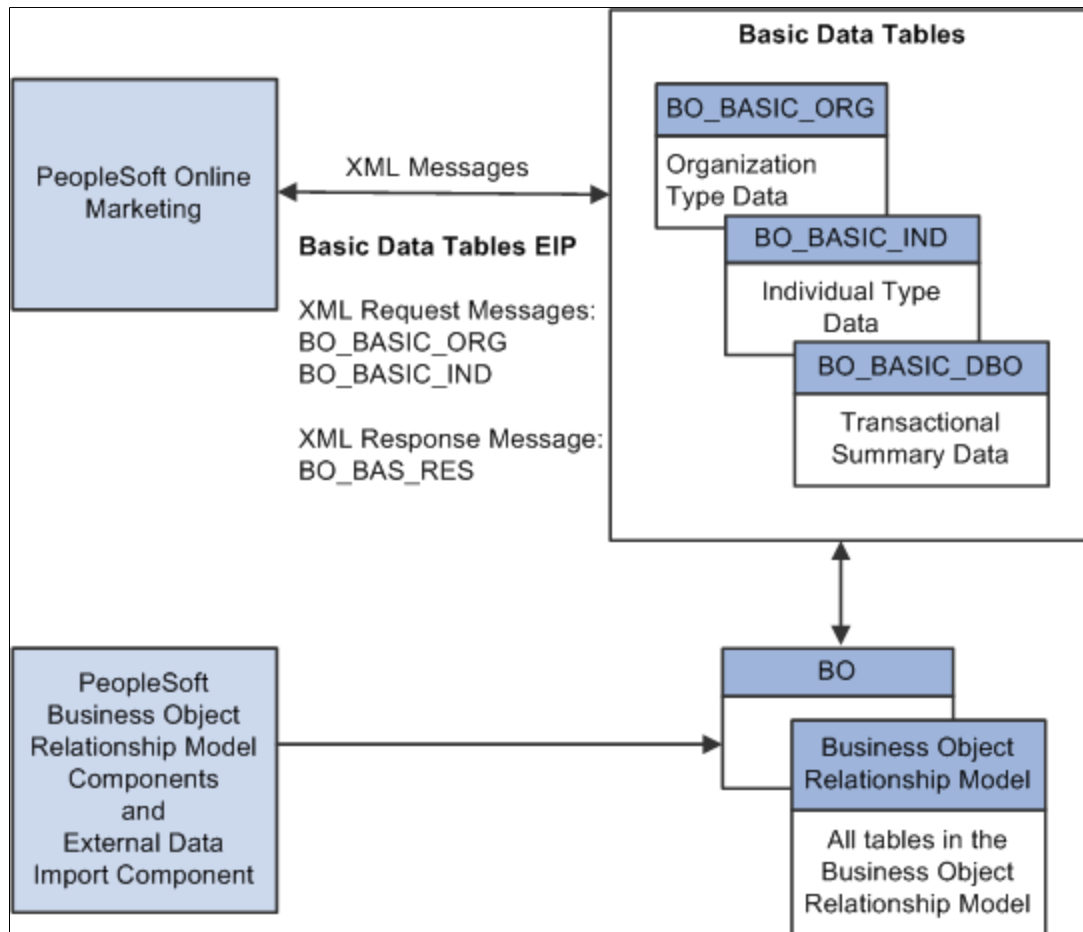
Basic Data Tables

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

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

Image: Basic Data Tables

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



When you create a business object and save it in the BORM, a subset of this information is passed to the basic data tables.

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

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

Related Links

[Understanding the Data Import Application Engine Process \(RBIMPORT\)](#)

[PeopleSoft Online Marketing](#)

Business Object Profiles

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

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

Related Links

[Understanding Profiles](#)

Defining Control Values for Business Objects

Understanding Business Object Controls

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

These topics discuss:

- Business object types.
- Role types and role categories.
- Relationship types and relationship categories.
- Contact information entries.
- Contact method types and contact method purpose types.
- Component transfer navigation.

Business Object Types

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

The PeopleSoft system delivers these predefined business object types:

- Individual
Represents a single individual, such as a contact or a consumer.
- Organization
Represents a group of individuals, such as a company.
- Database Object
Represents an object in the system.

See [Business Object Type Page](#).

Role Types and Role Categories

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

Individual Role Types

PeopleSoft CRM delivers these role types for individual business objects:

- **Person**

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

- **Worker**

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

- **Broker**

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

- **Contact**

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

- **Individual Consumer**

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

- **Account Contact**

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

- **Internal Contact**

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

- **External Contact**

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

- **Business Contact (IND)**

This role indicates that the individual is a customer.

- Ship To Individual

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

- Sold To Individual

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

- Bill To Individual

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

- Individual Prospect

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

- Sales User

This role type is assigned to sales users.

See "Setting Up Sales Users" (PeopleSoft CRM 9.2: Sales).

Organization Role Types

PeopleSoft CRM delivers these role types for organization business objects:

- Company

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

- Site

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

- Competitor

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

- Primary Owner - Company

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

- Corporate Hierarchy

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

- Business Contact (ORG)

This role indicates that the organization is a customer.

- Ship To Organization

This role indicates that the customer can receive shipments.

- Sold To Organization

This role indicates that the customer can make purchases.

- Bill To Organization

This role indicates that the customer can receive bills.

- Organizational Prospect

This role indicates that the individual is an organizational prospect.

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

Related Links

[Defining Role Types and Role Categories](#)

Relationship Types and Relationship Categories

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

- Company ↔ Site

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

- Site ↔ Site

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

- Primary Contact ↔ Company

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

- Contact ↔ Company

This type indicates a relationship between the contact and company role types and signals that the person with the contact role is a contact for the company. The system automatically establishes this

relationship when you associate a contact with a company by using the Company or Site components or the Person component with the Contact role.

- Primary Contact ↔ Site

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

- Contact ↔ Site

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

- Primary Contact ↔ Consumer

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

- Contact ↔ Consumer

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

- Primary Contact ↔ Person

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

- Contact ↔ Person

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

- Consumer ↔ Site

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

- Parent Company ↔ Company

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

- Primary Contact ↔ Competitor

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

- Contact ↔ Competitor

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

- Acct Owner ↔ Company

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

- Acct Team Member ↔ Company

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

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

Related Links

[Defining Relationship Types and Relationship Categories](#)

Contact Information Entries

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

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

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

Related Links

[Contact Information for Business Objects](#)

[Contact Info Page](#)

Contact Method Types and Contact Method Purpose Types

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

Contact Method Types

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

PeopleSoft CRM provides these predefined contact method types:

- Address
- Phone
- Email

Contact Method Purpose Types

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

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

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

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

- Business
- Cellular
- Default
- FAX
- Home

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

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

- Business
- Campus
- Dorm
- Home
- Other

Related Links

[Setting Up Contact Methods](#)

Component Transfer Navigation

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

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

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

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

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

Defining Business Object and Name Types

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

These topics discuss how to:

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

Pages Used to Define Business Object and Name Types

Page Name	Definition Name	Usage
<u>Business Object Type Page</u>	BO_TYPE	Modify and add business object types.
<u>Business Object Name Type Page</u>	BO_NAME_TYPE	Define name types for the selected business object type. When you define names for a business object, you must specify a type for each name.

Business Object Type Page

Use the Business Object Type page (BO_TYPE) to modify and add business object types.

Navigation

Set Up CRM, Common Definitions, Customer, Business Object Type, Business Object Type

Image: Business Object Type page

This example illustrates the fields and controls on the Business Object Type page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Business Object Type' page. At the top, the title 'Business Object Type' is displayed. Below it, there is a section with a light blue header 'Description'. Inside this section, the 'Business Object Type ID' is set to '2', the 'Description' is 'Organization', and the 'Short Description' is 'Org.'. Below this section is an orange button labeled 'Modify System Data'. Underneath the button, a message states 'This object is maintained by PeopleSoft.'. At the bottom, the 'Modified' date and time are '10/22/2001 2:45PM PDT', and the user is 'CVP1'.

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

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

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

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

Business Object Name Type Page

Use the Business Object Name Type page (BO_NAME_TYPE) to define name types for the selected business object type.

When you define names for a business object, you must specify a type for each name.

Navigation

Set Up CRM, Common Definitions, Customer, Business Object Name Type, Business Object Name Type

Image: Business Object Name Type page

This example illustrates the fields and controls on the Business Object Name Type page. You can find definitions for the fields and controls later on this page.

Business Object Name Type

Description

Business Object Type ID 2

Business Object Name Type PREFERRED

Description Preferred Name

Short Description Preferred

Modify System Data

This object is maintained by PeopleSoft.

Modified 10/10/2001 2:12PM PDT CVP1

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

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

Related Links

[Understanding Name and Address Information in CRM](#)

Defining Role Types and Role Categories

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

These topics discuss how to:

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

Pages Used to Define Role Types and Categories

Page Name	Definition Name	Usage
Role Type Page	BO_ROLE_TYPE	Modify and add role types.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Role Category Page</u>	BO_SRCH_GROUP	Modify and add role categories. Generally, role categories serve a specific processing purpose, such as a business object directory search process.

Role Type Page

Use the Role Type page (BO_ROLE_TYPE) to modify and add role types.

Navigation

Set Up CRM, Common Definitions, Customer, Role Type, Role Type

Image: Role Type page

This example illustrates the fields and controls on the Role Type page. You can find definitions for the fields and controls later on this page.

Role Type **Default Views**

Role Type

Role Type Definition


Role Type ID 2

Description Company

Short Description Company

Business Object Type Organization

Transaction ID Company

Enabled Role Icon PS_COMPANY_ICN 

Disabled Role Icon

Cascade Option Do not cascade

- ☒ **Publish EIP**
- ☒ **Join Indicator**
- ☒ **Participant Indicator**
- ☒ **Capture Contact Methods**
- ☒ **Enabled for Basic Data**
- ☒ **Enabled for Quick Create**
- ☒ **SetID is Required**





Application Class ID Company
Package Tree Viewer

Application Class Path RB_CDM:ORGANIZATION:COMPANY

Secure Record Name BC

Status Record Name BC

Status Field Name CUST_STATUS

Roles		Personalize Find  	First  1-2 of 2  Last
Role	Quick Create Template		
1 Site	The Company with Site (BC)		
2 Contact	CDM Company with Contact		

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

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

Role Type ID

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

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

See [Understanding the Business Object Search and Quick Create Process](#).

Application Class ID and Application Class Path Select the ID and path for the application class that encapsulates the business logic of the role that is denoted by this role type.

For example, the contact role is supported by the contact application class.

Package Tree Viewer

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

See "Understanding Application Classes and Packages" (PeopleSoft CRM 9.2: Automation and Configuration Tools).

Secure Record Name

Enter a record name to enable setID security searching.

Status Record

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

Status Field Name

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

Related Links

[Defining Component Transfer Navigation](#)

[Understanding BO Search and Quick Create Setup](#)

[Understanding the Business Object Search and Quick Create Process](#)

Role Category Page

Use the Role Category page (BO_SRCH_GROUP) to modify and add role categories.

Generally, role categories serve a specific processing purpose, such as a business object directory search process.

Navigation

Set Up CRM, Common Definitions, Customer, Role Category, Role Category

Image: Role Category page

This example illustrates the fields and controls on the Role Category page. You can find definitions for the fields and controls later on this page.

Role Category	
Description	
Role Category ID	2
Description	Customer
Short Description	Customer
Category Roles	
Personalize View All [Icon] First 1-2 of 2 Last	
Role Type ID	Description
2	Company
9	Individual Consumer

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

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

Role Category ID

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

Defining Relationship Types and Relationship Categories

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

These topics discuss how to:

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

Pages Used to Define Relationship Types and Relationship Categories

Page Name	Definition Name	Usage
Relationship Type Page	BO_REL_TYPE	Modify and add relationship types.
Relationship Category Page	BO_REL_CATEGORY	Define categories of relationships.

Relationship Type Page

Use the Relationship Type page (BO_REL_TYPE) to modify and add relationship types.

Navigation

Set Up CRM, Common Definitions, Customer, Relationship Type, Relationship Type

Image: Relationship Type page

This example illustrates the fields and controls on the Relationship Type page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Relationship Type' page with two main sections: 'Relationship Type Information' and 'Relationship Structure'.

Relationship Type Information

- Relationship Type ID** 10
- Description** Contact / Company
- Short Description** 10
- Enabled Icon**
- Disabled Icon**
- ☐ **Primary Relationship**
- ☐ **Hierarchical**
- ☒ **Publish EIP**
- ☒ **Peer to Peer**

Relationship Structure

Position 1

- Role Type ID 1** (8) - Contact
- Role Verb 1** Represents
- Role Cardinality** Many ☒ **Role Optionality**
- Minimum** 0
- Maximum** ☒ **Unlimited**
- ☒ **Capture Contact Methods**
- ☒ **Enabled for Basic Data**

Position 2

- Role Type ID 2** (2) - Company
- Role Verb 2** Is Represented By
- Role Cardinality** Many ☐ **Role Optionality**
- Minimum** 0
- Maximum** ☒ **Unlimited**
- ☐ **Capture Contact Methods**
- ☐ **Enabled for Basic Data**

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

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

Relationship Type ID

Displays the identification code that is associated with the relationship type.

Primary Relationship

Indicates that the relationship is coupled with another relationship type. Only one primary relationship can exist at one time; all others are secondary, with different relationship types. When you select Primary Relationship, another field appears where you can enter the secondary relationship type.

Hierarchical

Select to define a hierarchical relationship. Relationship hierarchies show parent-child relationships between business objects and are graphically represented with a tree format in the

relationship viewer. In hierarchical relationships, the business object participating in the Role Type ID 1 field is interpreted as the parent, and the business object in Role Type ID 2 is the child.

Peer to Peer

Select to define a peer-to-peer relationship. Peer-to-peer relationships are appropriate between two business objects with a type of *Individual* that share a direct relationship to a third business object.

Publish EIP (publish enterprise integration points)

Select to include the relationship data when publishing a CDM application message.

Relationship Structure

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

Role Type ID 1 and Role Type ID 2

Select the role types that can participate in the relationship. Role types are established on the Role Type page.

Role Verb 1 and Role Verb 2

Enter a verb clause that describes the role played by business objects that participate in the relationships of this type.

Role Cardinality

Select the number of business objects that can participate in the relationship role: *One* or *Many*. If the value is *One* for role type 1 or 2, only one business object is defined in the specified role for a given instance of the relationship. If the value is *Many*, you can define minimum and maximum values for the number of business objects that are defined in the specified role.

Role Optionality

Select if this type of relationship is required when you add a role.

Minimum and Maximum

Enter the minimum and maximum values for the number of objects that can participate in this relationship. If no maximum constraint exists, select the Unlimited check box.

Capture Contact Methods

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

Enabled for Basic Data

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

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

Related Links

[Understanding the Relationship Viewer](#)

Relationship Category Page

Use the Relationship Category page (BO_REL_CATEGORY) to define categories of relationships.

Navigation

Set Up CRM, Common Definitions, Customer, Relationship Category, Relationship Category

Image: Relationship Category page

This example illustrates the fields and controls on the Relationship Category page. You can find definitions for the fields and controls later on this page.

Relationship Category			
Description			
Relationship Category ID 11			
Description Primary Ship To Contact			
Short Description PSH2Contct			
Relationships in Category			
Relationship Type ID	Bus Object Relationship Name	Role Type 1 Name	Role Type 2 Name
73	Primary Contact for BC Org Sh2	Contact	Ship To Organization
79	Primary Contact for BC Ind Sh2	Contact	Ship To Individual

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

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

Relationship Category ID

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

Configuring Address Books

This topic discusses how to define contact information entries.

Page Used to Configure Address Books

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Address Book Configuration Page	BO_TYPE_ABE	Define contact information entries for a business object type.

Address Book Configuration Page

Use the Address Book Configuration page (BO_TYPE_ABE) to define contact information entries for a business object type.

Navigation

Set Up CRM, Common Definitions, Customer, Address Book Configuration, Address Book Configuration

Image: Address Book Configuration page

This example illustrates the fields and controls on the Address Book Configuration page. You can find definitions for the fields and controls later on this page.

Address Book Configuration

Description

Business Object Type ID 2

Description Organization

Short Description Org.

Contact Info Configuration

Seq	Description	Address	Phone 1	Phone 2	Phone 3	Phone 4	Email 1	Email 2
1	Business	Busines: ▾	Business ▾	Cellular ▾	FAX ▾	Pager ▾	Busine: ▾	Other ▾
	Entry	Other ▾	Main ▾	Cellular ▾	FAX ▾	Pager ▾	Other ▾	Other ▾

Contact Info Configuration

Description

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

Related Links

[Address Books in CRM](#)

[Contact Information on CRM Components](#)

Setting Up Contact Methods

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

These topics discuss how to:

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

Pages Used to Set Up Contact Methods

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Contact Method Use Page</u>	CM_USE	Maintain contact method uses.
<u>Contact Method Type Page</u>	CM_TYPE	Maintain contact method types.
<u>Contact Method Purpose Type Page</u>	CM_PURPOSE_TYPE	Maintain or add contact method purpose types.

Contact Method Use Page

Use the Contact Method Use page (CM_USE) to maintain contact method uses.

Navigation

Set Up CRM, Common Definitions, Customer, Contact Method Use, Contact Method Use

Description

Enter a description for the contact method use.

Use Icon

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

Contact Method Type Page

Use the Contact Method Type page (CM_TYPE) to maintain contact method types.

Navigation

Set Up CRM, Common Definitions, Customer, Contact Method Type, Contact Method Type

Image: Contact Method Type page (1 of 2)

This example illustrates the fields and controls on the Contact Method Type page (1 of 2). You can find definitions for the fields and controls later on this page.

Contact Method Type

Contact Method Type

Contact Method Type ID 2

Description Phone Contact Method

Short Description Phone

Capture for Quick Create Many

Uses
[Personalize](#) | [View All](#) |
First 1 of 1 Last




Priority	Contact Method Use ID	

Roles
[Personalize](#) | [View All](#) |
First 1-9 of 9 Last

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

Image: Contact Method Type page (2 of 2)

This example illustrates the fields and controls on the Contact Method Type page (2 of 2). You can find definitions for the fields and controls later on this page.

Relationships		Personalize View All 	First  1-10 of 12  Last
Priority	Relationship Type ID		
3	Primary Contact / Company		
6	Contact / Company		
5	Primary Contact / Site		
7	Contact / Site		
4	Primary Contact / Consumer		
8	Contact / Consumer		
1	Primary Contact / Partner		
11	Contact / Partner		
10	Contact / Partnership		
4	Primary Contact / Partnership		

Person Basic Sync Setting	
Role Type ID	Add Contact Methods
Worker	<input checked="" type="checkbox"/>
Individual Consumer	<input checked="" type="checkbox"/>
Person of Interest	<input type="checkbox"/>

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

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

Contact Method Type

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

Contact Method Type ID

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

Uses

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

Contact Method Use ID

Select the contact method uses that you want to associate with the contact method type.

Roles

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

Priority

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

Relationships

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

Priority

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

Person Basic Sync Setting

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

Add Contact Methods

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

Related Links

[Integration with PeopleSoft HCM, PeopleSoft Campus Solutions or Third-Party HR Data](#)

Contact Method Purpose Type Page

Use the Contact Method Purpose Type page (CM_PURPOSE_TYPE) to maintain or add contact method purpose types.

Navigation

Set Up CRM, Common Definitions, Customer, Contact Method Purpose Type, Contact Method Purpose Type

Image: Contact Method Purpose Type page

This example illustrates the fields and controls on the Contact Method Purpose Type page. You can find definitions for the fields and controls later on this page.

The screenshot shows a web page titled "Contact Method Purpose Type". Below the title is a section labeled "Description" in a light blue header. Inside this section, the following information is displayed in a display-only format:

- Contact Method Type ID** 2 Phone
- Contact Method Purpose ID** 11
- Description** Business
- Short Description** Business
- Field Value** BUSN

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

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

Contact Method Type ID	Displays the contact method type with which the contact method purpose is associated.
Contact Method Purpose ID	Displays the identification code that is associated with the contact method purpose type. When you add a contact method purpose type, the system assigns a value by using automatic numbering functionality.
Field Value	Enter a value to map contact method purpose types in PeopleSoft CRM to corresponding translate values in PeopleSoft Supply Chain Management and third-party systems.

Defining Component Transfer Navigation

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

This topic discusses how to define component transfer navigation paths.

Pages Used to Define Component Transfer Navigation

Page Name	Definition Name	Usage
<u>Component Navigation - Description Page</u>	RB_TXN_DEFN	Maintain component transfer navigation descriptions.
Component Navigation - Navigation Path	RB_TXN_MKT	Define component transfer navigation paths (the locations of the transaction pages to which users are transferred).

Component Navigation - Description Page

Use the Component Navigation - Description page (RB_TXN_DEFN) to maintain component transfer navigation descriptions.

Navigation

Set Up CRM, Common Definitions, Component Configuration, Component Navigation, Description

Image: Component Navigation - Navigation Path page

This example illustrates the fields and controls on the Component Navigation - Navigation Path page. You can find definitions for the fields and controls later on this page.

Description	
Transaction ID	ADD_COMPANY
Description	Add Company

Component Transfer Details		Find View All	First 1 of 1 Last
Market	Global		
Transaction Title			
Menu Name	RB_MANAGE_CUSTOMER_INFORMATION		
Menu Bar Name	USE		
Item Name	RD_COMPANY_2		
Component Name	RD_COMPANY_2		
Page Name	RD_COMPANY_SUMMARY		
Record (Table) Name	RD_COMPANY		
Description Fieldname			
Component Interface Name			
Display Template			

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

Market

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

Menu Name, Menu Bar Name, Item Name, Component Name, and Page Name

Enter the complete navigation for the page to which the users transfer. Enter the PeopleSoft PeopleTools object names for the menu, menu bar, item name, component name, and page name.

Record (Table) Name

Select the object name for the table that is populated by the specified page. Typically, this is the search record.

Defining Segment Codes

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

This topic discusses how to define segment codes.

Page Used to Define Segment Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Segment Code Page	RD_SEGMENT	Define codes that represent customer attributes, such as a customer's market segment, priority, or value. For informational purposes, you can associate each company and consumer with a segment code.

Segment Code Page

Use the Segment Code page (RD_SEGMENT) to define codes that represent customer attributes, such as a customer's market segment, priority, or value.

For informational purposes, you can associate each company and consumer with a segment code.

Navigation

Set Up CRM, Common Definitions, Customer, Segment Code, Segment Code

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

Defining Industries

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

This topic discusses how to define industries.

Page Used to Define Industries

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Industry Page	RSF_INDUSTRY	Define industries.

Industry Page

Use the Industry page (RSF_INDUSTRY) to define industries.

Navigation

Set Up CRM, Common Definitions, Customer, Industries, Industry

Image: Industry page

This example illustrates the fields and controls on the Industry page. You can find definitions for the fields and controls later on this page.

SIC Code (standard industrial classification code)

Enter the standard industrial classification code for this industry.

Parent Industry ID

Enter the parent industry for this industry.

Related Links

[Understanding the Company Component](#)

Defining National ID Types

This topic discusses how to define national ID types.

Page Used to Define National ID Types

Page Name	Definition Name	Usage
National Identification Type Page	NID_TYPE_TABLE	Define national ID types.

National Identification Type Page

Use the National Identification Type page (NID_TYPE_TABLE) to define national ID types.

Navigation

Set Up CRM, Common Definitions, Customer, National ID Type, National Identification Type

Image: National Identification Type page

This example illustrates the fields and controls on the National Identification Type page. You can find definitions for the fields and controls later on this page.

National Identification Type

National ID Information

Country USA United States

National ID Types

Personalize | Find | View All | First 1-2 of 2 Last

*NID Type	Default	*Description	Short Desc	National ID Format	NID as stored		
ITIN	<input type="checkbox"/>	Individual Taxpayer ID	ITIN				
PR	<input checked="" type="checkbox"/>	Social Security Number	SSN	XXX-XX-XXXX	XXXXXXXXXX		

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

National ID Format Enter the format for the national ID.

Related Links

[Defining Information for Business Contacts](#)

Defining Customer Groups

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

This topic discusses how to define customer groups.

Page Used to Define Customer Groups

Page Name	Definition Name	Usage
Customer Group Table Page	CUST_GROUP_TBL	Define customer groups. You can assign customers to groups for reporting and administration purposes.

Customer Group Table Page

Use the Customer Group Table page (CUST_GROUP_TBL) to define customer groups.

You can assign customers to groups for reporting and administration purposes.

Navigation

Set Up CRM, Common Definitions, Customer, Customer Group, Customer Group Table

Image: Customer Group Table page

This example illustrates the fields and controls on the Customer Group Table page. You can find definitions for the fields and controls later on this page.

Customer Group Table

SetID SHARE

Customer Group MERGE

Customer Group Description

Find | View All

First 1 of 1 Last

+ -

Customer Group Type Pricing

*Effective Date 03/10/2008

*Status Active

*Description Merge Customer Group

*Short Description Merge Cust

☐ Global

Customer Group Type

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

Defining Customer Data Management System Options

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

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

Page Used to Define Customer Data Management System Options

Page Name	Definition Name	Usage
Customer Data Management System Options Page	BO_INSTALLATION	Define customer data management system options.

Customer Data Management System Options Page

Use the Customer Data Management System Options page (BO_INSTALLATION) to define customer data management system options.

Navigation

Set Up CRM, Common Definitions, Customer, Customer Installation Options, Customer Data Management System Options

Image: Customer Data Management System Options page

This example illustrates the fields and controls on the Customer Data Management System Options page. You can find definitions for the fields and controls later on this page.

Customer Data Management System Options

System Settings

☒ **Search for CM Before Adding**

This feature allows you to search for an existing contact method based on all the fields you provide for a new contact method. If an exact match is found, then instead of adding a new Contact Method, the existing one will be used as a reference.

☒ **Show Contact Method Search**

This feature allows the user of the Customer Data Management components to enter contact method information into the page and then search for matching contact methods. If this option is not selected, the Search button will not be shown on the Edit Contact Method pages.

☒ **Process Basic Data Summary**

This feature will update the basic data tables and override the setting for the role. The basic data tables are used by PeopleSoft CRM Online Marketing, the data import process, and PeopleSoft CRM Mobile. The checkbox must be selected when these products are installed.

☒ **Secure Quick Create Access**


This feature restricts access to the Quick Create functionality based on the user's security access to the Customer Data Model components, as defined by the user's Permission List.

☐ **Enable BindS for Oracle**

This feature enables the BO Search SQL generation for the Oracle platform utilizing bind variables. If unchecked, search criteria value are embedded into the SQL string and bind variables are not used.

☐ **CRM Integrated With SCM**

Default SetID for Inbound EIPs



☐ **Enable Search Match for EIP**

This feature will enable the calling of the Search Match function when processing the Person Basic Sync incremental message. The Person Basic Fullsync message does not use Search Match because it is an initial load program.

Search Match Configuration ID

[View Details](#)

☐ **Use ABE Configuration for EIP**

This feature directs the Person Basic Sync and Fullsync EIPs to use the Address Book Configuration settings when assigning Contact Methods into Address Book Entry categories. Address Books are rebuilt for the Person each time Contact Methods are updated by EIP.

Integration for HR HelpDesk ?

CRM Integrated With HCM
☒ **EBS HCM**

Employee ID display options

Modified 07/09/2014 2:09AM PDT VP1

Process Basic Data Summary

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

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

CRM Integrated With SCM

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

Default SetID for Inbound EIPs

(default setID for inbound enterprise integration points)setIDdefault for data integration EIPs (enterprise integration points)default setID

Select the default setID. The CDM EIPs use this setID during the processing of the EIPs if no setID is provided on the incoming application messages.

See [Understanding Enterprise Integration Technology](#).

Enable Search Match for EIP

See "Using Search/Match with PERSON_BASIC_SYNC" (PeopleSoft CRM for Higher Education 9.2).

Search Match Configuration ID

See "Using Search/Match with PERSON_BASIC_SYNC" (PeopleSoft CRM for Higher Education 9.2).

Integration for HR HelpDesk**CRM Integrated with HCM**

Select the EBS HCM check box if the system is integrated with EBS HCM.

Employee ID display options

Select a value from the list to set the field display options if the integration with EBS HCM is done for HR HelpDesk. The values available are:

- Both: Displays both EBS Employee Number and PeopleSoft Employee ID in HR HelpDesk pages.
- Only EBS Employee No: Displays only EBS Employee Number in the HR HelpDesk pages.
- Only Peoplesoft Empl ID: Displays only PeopleSoft Employee ID in HR HelpDesk pages.

The following HR HelpDesk pages are affected by this setting.

- Worker
- Case Details for HRHD case
- Related Cases for HRHD case
- Self Service HRHD Case creation for Direct Reports
- Chat Mini Navigation

Defining Basic Data Mappings

These topics discuss how to:

- Map CDM properties to basic data tables.

- Clone basic data mappings.

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

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

Pages Used to Define Basic Data Mappings

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Basic Data Mapping Page	BO_ROLE_MAP	Map CDM role and relationship properties to basic data tables.
Basic Data Mapping Cloning Page	BO_ROLE_MAP_CLONE	Clone basic data mappings.
Basic Data Enabled Roles	BO_ROLE_MAP_ENABLE	View a summary list of the basic data mapping roles and relationships.

Related Links

[Basic Data Tables](#)

Basic Data Mapping Page

Use the Basic Data Mapping page (BO_ROLE_MAP) to map CDM role and relationship properties to basic data tables.

Navigation

Set Up CRM, Common Definitions, Customer, Basic Data Mapping, Basic Data Mapping

Image: Basic Data Mapping page

This example illustrates the fields and controls on the Basic Data Mapping page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Basic Data Mapping' page with three tabs: 'Basic Data Mapping', 'Basic Data Mapping Cloning', and 'Basic Data Enabled Roles'. The 'Basic Data Mapping' tab is active.

Basic Data Mapping

Role Type ID: Company
 Mapping Type: Role Mapping
 Class Path: RB_CDM:ORGANIZATION:COMPANY
 Class ID: Company

Mapping Details Find | View All First 1 of 5 Last

Element Type: Field

Property <--> BD Field

From Property	From Record	From Field	To Record	*To Field	
BOID			BO_BASIC_ORG	BO_ID	+ -
			BO_BASIC_ORG	ROLE_TYPE_ID	+ -
			BO_BASIC_ORG	BO_REL_ID	+ -
CompanySetID	RD_COMPANY	SETID	BO_BASIC_ORG	SETID	+ -
DATA_SET_SYS_ID	BO_MKT_DATA	DATASET_SYSID	BO_BASIC_ORG	DATASET_SYSID	+ -
CompanyID	RD_COMPANY	COMPANYID	BO_BASIC_ORG	COMPANYID	+ -
CUST_ID	BC	CUST_ID	BO_BASIC_ORG	CUST_ID	+ -
DUNS_NUMBER	BO_MKT_DATA	DUNS_NUMBER	BO_BASIC_ORG	DUNS_NUMBER	+ -
EXTERNAL_LIST_ID	BO_MKT_DATA	EXTERNAL_LIST	BO_BASIC_ORG	EXTERNAL_LIST_ID	+ -
WebUrl	RD_COMPANY	WEB_URL	BO_BASIC_ORG	WEB_URL	+ -

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

Basic Data Mapping

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

Property Mapping Details

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

Basic Data Mapping Cloning Page

Use the Basic Data Mapping Cloning page (BO_ROLE_MAP_CLONE) to clone basic data mappings.

Navigation

Set Up CRM, Common Definitions, Customer, Basic Data Mapping, Basic Data Mapping Cloning

Image: Basic Data Mapping Cloning page

This example illustrates the fields and controls on the Basic Data Mapping Cloning page. You can find definitions for the fields and controls later on this page.

Basic Data Mapping Basic Data Mapping Cloning Basic Data Enabled Roles

Clone Mapping

Give the keys to create a new mapping from this mapping:

*Role Type ID Company ▼

*Mapping Type Role Mapping ▼

Clone Mapping

Clone Mapping

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

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

Chapter 4

Defining Name and Address Information for Business Objects

Understanding Name and Address Information in CRM

These topics list common elements and discuss:

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

Related Links

[Understanding the Company Component](#)

[Understanding Sites](#)

[Understanding Persons](#)

Common Elements Used to Define Basic Data Mappings

Primary Name	The name that appears online when the business object is referenced in system transactions.
Contact Method Type	A method by which you contact a business object. CRM provides the <i>Address</i> , <i>Phone</i> , and <i>Email</i> contact methods with the system.
Contact Method Purpose Type	<p>A further clarification of a contact method. As delivered, the <i>Home</i> and <i>Business</i> contact method purpose types are available for the Email contact method and the types <i>Home</i>, <i>Business</i>, <i>Fax</i>, and <i>Pager</i> contact method purpose types are available for the Phone contact method. CRM provides additional contact method purpose types that you can configure and you can define additional types as needed.</p> <p>See Contact Method Types and Contact Method Purpose Types.</p>
Contact Info Entry (contact information entry)	<p>A grouping of contact methods. As delivered, contact information entries in CRM can contain one address, up to two email addresses, and up to four phone numbers.</p> <p>See Configuring Address Books.</p>

Address Book	The collection of contact info entries for a business object.
Consumer	A person business object that has the consumer role.

Business Object Names in PeopleSoft CRM

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

Address Books in CRM

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

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

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

Contact Information on CRM Components

These topics discuss:

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

See [Address Book Configuration Page](#).

Summary Contact Information

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

Detailed Contact Information

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

The Contact Info page enables you to view and update:

- Address information.

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

- Contacts.

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

- Sites.

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

Advanced Options

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

Existing Address Searches

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

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

1. Enter any known address information, click the Look Up Address link on the Contact Info page for a company, consumer, contact, site, or worker, and select an address from the list of existing addresses.

The system uses the information you enter as search criteria and returns any contact method records that match the criteria. You can select the applicable record, or, if none of the returned records apply, create a new contact record.

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

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

Contact Method Definition for Business Object Roles

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

Contact Method Definition for Business Object Relationships

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

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

Updating Name Information

This topic discusses how to add and update names.

Pages Used to Update Name Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Company - Details	RD_COMPANY_DETAILS	Add or modify a company name.
Person - Details	RD_PERSON_DETAILS	Add or modify a person's name.
Site - Name	RD_SITE_NAME_PG	Add or modify a site name.
Company - More Names Person - More Names	RD_MORE_NAMES_SEC	Add and update names and designate a primary name for a company or person.

More Names Page

Use the More Names page (RD_MORE_NAMES_SEC) to add and update names and designate a primary name for a company or person.

Navigation

Click the More Names link on the Details page for a company or person.

Image: More Names page

This example illustrates the fields and controls on the More Names page. You can find definitions for the fields and controls later on this page.

More Company Names

Company Name

Primary	*Name	*Name Type	Delete
<input checked="" type="checkbox"/>	MMA Property Management Group	Preferred Name	Delete

Add New Name

Help

- Primary

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

Select the type of name, *Preferred Name*, *Alternate Name.*, or *Merged*.
- Add New Name

Click to enter an additional name.

Related Links

[Defining Business Object and Name Types](#)

Managing Summary Contact Information

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

Pages Used to Manage Summary Contact Information

Page Name	Definition Name	Usage
Company - Summary	RD_COMPANY_SUMMARY	View name and primary contact information for a company and the primary contact of the Company (if available).
Company - Details	RD_COMPANY_DETAILS	Maintain the first contact information entry for the company.

Page Name	Definition Name	Usage
Site - Primary	RD_SITE_MAIN_2	View the name and maintain the first contact information entry of a site or Alternate Capacity business object.
Person - Primary	RD_PRSN_PRIMARY	View the name and maintain the first and second contact information entries of a person or worker.

Maintaining Contact Information for Business Objects

These topics discuss how to:

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

Pages Used to Maintain Contact Information

Page Name	Definition Name	Usage
Person - Contact Info	RD_PRSN_ADDR_BOOKS	Access contact information for a person, worker, or contact.
Company - Contact Info	RD_COMP_ADDR_BOOK	Access contact information for a company.
Site - Contact Info	RD_SITE_ADDR_BOOK	Access contact information for a site.
Company - Address Book Person - Address Book Site - Address Book	ABE_DETAIL	Maintain contact information entries for a person, company, or site.
<u>Address Search Result List Page</u>	ABE_ADD_LOOKUP_SEC	Select an existing address to use or modify as the address for a company, person, or site.
Company - Update Address Person - Update Address Site - Update Address	RD_ADDR_DETAIL	Update address detail.

Page Name	Definition Name	Usage
Company - Update Phone Person - Update Phone Site - Update Phone	RD_PHONE_DETAIL	Update phone detail.
Company - Update Email Person - Update Email Site - Update Email	RD_EMAIL_DETAIL	Update email detail.

Contact Info Page

Use the Contact Info page (RD_PRSN_ADDR_BOOKS), (RD_COMP_ADDR_BOOK), or (RD_SITE_ADDR_BOOK) to access contact information for a person, worker, or contact for a company, site, or person.

Navigation

- Customers CRM, Add Person or Search Person, Person, Contact Info
- Customers CRM, Add Company or Search Company, Company, Contact Info

Click the Company link.

- Customers CRM, Add Site or Search Site, Site, Contact Info,, Site

Click the Site link.

Image: Company - Contact Info page

This example illustrates the fields and controls on the Company - Contact Info page. You can find definitions for the fields and controls later on this page.

Company

Save | 360-Degree View | Search | Previous | Next | Add Company | Add to My Contacts | Add Task | >> Personalize

Customer Sparkle Clean Laundromats
Contact Becky Lee Campton
Phone 508/714-7894

Location Little Rock, AR, USA
Job Title Executive Assistant
Email blcampton@sparkle.com

Company | Account Team | Tasks | Call Reports | Notes | **Contact Info** | Relationships | More Info | Attributes

Contacts | **Company** | Sites

Contact Info Entries
Personalize | Find | View All | First | 1-5 of 5 | Last

Description	Address	Phone	Email	
Business	7623 Clearwater Rd Little Rock, AR 98745	Business: 800/966-2546	spk@spk.com	
Entry 2	6778 Harbor Street Benton, AR			
Entry 3	9090 James Ct. Jacksonville, AR			
Entry 4	8908 Hot Springs Creek Little Rock, AR			
Entry 5	909 Outlook Ave Mountain View, CA			

Create Entry

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

See [Configuring Address Books](#).

Contact Info Entries

Description

Click a description to edit the contact information that is in the entry.

Create Entry

Click to add a new contact information entry.

Advanced Options

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

Image: Contact Info page - Advanced Options section

This example illustrates the fields and controls on the Contact Info page - Advanced Options section. You can find definitions for the fields and controls later on this page.

Primary	Address	Purpose	Start Date	End Date	Uses	Edit
<input checked="" type="checkbox"/>	7623 Clearwater Rd, Little Rock, AR, 98745, USA	Business	01/01/1900			Edit
<input type="checkbox"/>	6778 Harbor Street, Benton, AR, USA	Business	01/01/1900			Edit
<input type="checkbox"/>	9090 James Ct., Jacksonville, AR, USA	Business	01/01/1900			Edit
<input type="checkbox"/>	8908 Hot Springs Creek, Little Rock, AR, USA	Business	01/01/1900			Edit
<input type="checkbox"/>	909 Outlook Ave, Mountain View, CA, USA	Business	01/01/1900			Edit

Edit

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

Address Book Page

Use the Address Book page (ABE_DETAIL) to maintain contact information entries for a person, company, or site.

Navigation

- Click a Description link in the Contact Info Entries grid on the Contact Info page for a company, person, or site.
- Click the Create Entry button on the Contact Info page for a company, person, or site.

Image: Address Book page

This example illustrates the fields and controls on the Address Book page. You can find definitions for the fields and controls later on this page.

Company
Address Book - Sparkle Clean Laundromats

Contact Info Entries

*Description Business

Phone			
*Type	Country Code	Number	Ext/PIN
Business		800/966-2546	
Cellular			
FAX			
Pager			

Email	
*Type	Email Address
Business	spk@spk.com
Other	

Address

Look up Address

*Type Business

Physical Location

*Country United States

Address 1 7623 Clearwater Rd

Address 2

Address 3

City Little Rock

County

State AR Arkansas

Postal 98745

Time Zone Central Time (US)

Region Midwest - USA

☒ Sold To Address

☒ Bill To Address

☒ Ship To Address

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

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

See [Understanding Purchasing Options](#).

Address Search Result List Page

Use the Address Search Result List page (ABE_ADD_LOOKUP_SEC) to select an existing address to use or modify as the address for a company, person, or site.

Navigation

Click the Look Up Address link on the Contact Info page for a company, person, or site.

Image: Address Search Result List page

This example illustrates the fields and controls on the Address Search Result List page. You can find definitions for the fields and controls later on this page.



Select a listed address.

Update Address Page

Use the Update Address page (RD_ADDR_DETAIL) to update address details for a company, person, or site.

Navigation

Expand the Advanced Options section on the Contact Info page for a company, person, or site.

Select the Address tab and click the Edit button next to any listed address.

Image: Update Address page (1 of 2)

This example illustrates the fields and controls on the Update Address page (1 of 2). You can find definitions for the fields and controls later on this page.

Company

Update Address

Address Information

*Purpose

Physical Loc

*Country


Address 1

Address 2

Address 3

City

County

State  Arkansas

Postal

Phone

Time Zone Central Time (US)

Region



Image: Update Address page (2 of 2)

This example illustrates the fields and controls on the Update Address page (2 of 2). You can find definitions for the fields and controls later on this page.









Original Date Address is Effective

Start Date 01/01/1900 End Date 12/31/2999

Current Date Address is Effective

Start Date  End Date 

Roles Address Applies to

Description	Start Date	End Date
Ship To Organization	01/01/1900 	<input type="text"/> 
Bill To Organization	01/01/1900 	<input type="text"/> 
Sold To Organization	01/01/1900 	<input type="text"/> 
Company	01/01/1900 	<input type="text"/> 

[Return to Address Summary Page](#)

* Required Field

Search for Existing Address

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

Create Using Entered Address

Click to create the address by using the information that you enter.

Address Effective Dates and Applications

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

Roles Address Applies to

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

Update Phone Page

Use the Update Phone page (RD_PHONE_DETAIL) to update phone details for a company, person, or site

Navigation

Expand the Advanced Options section on the Contact Info page for a company, person, or site.

Select the Phone tab and click the Edit button next to any listed.

Image: Update Phone page

This example illustrates the fields and controls on the Update Phone page. You can find definitions for the fields and controls later on this page.

Company

Update Phone

Phone Information

*Purpose Business

Country Code

*Number 800/966-2546

Extension

Phone Effective Dates and Applications

Original Date Phone is Effective

Start Date 01/01/1900 End Date 12/31/2999

Current Date Phone is Effective

Start Date End Date

Roles Phone Applies to

Description	Start Date	End Date
Company	01/01/1900	

OK [Return to Phone Summary Page](#)

* Required Field

Phone Effective Dates and Applications

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

Roles Phone Applies to

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

Update Email Page

Use the Update Email page (RD_EMAIL_DETAIL) to update email detail.

Navigation

Expand the Advanced Options section, select the Email tab, and click the Edit button next to any listed email address.

Image: Update Email page

This example illustrates the fields and controls on the Update Email page. You can find definitions for the fields and controls later on this page.

Company

Update Email

Email Information

*Purpose Business

*Email Address spk@spk.com

Email Effective Dates and Applications

Original Email is Effective

Start Date 10/30/2001 End Date 12/31/2999

Current Email is Effective

Start Date End Date

Roles Email Applies to

Description	Start Date	End Date
Company	10/30/2001	

OK

[Return to Email Summary Page](#)

* Required Field

Email Effective Dates and Applications

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

Roles Email Applies to

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

Related Links

[Setting Up Contact Methods](#)

Defining Customer Contacts

This topic discusses how to define contacts for a customer.

Pages Used to Define Customer Contacts

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Person - Contacts	RD_CONSUMER_REP	Maintain the list of contacts for a person. You can only define contacts for a person with the consumer role.
Company - Contacts	RD_COMPANY_CNTCT_2	Maintain the list of contacts that are defined for a company.
Site - Contacts	RD_SITE_CNTCT_2	Maintain the list of contacts for a site.
Create Contact of <object>	RBQ_QCREATE	Create a contact of a company, consumer, or site.
Modify <contact>	ABE_DETAIL	Maintain contact information entries for a contact of a company, consumer, or site. This page is similar in format and usage to the Create Contact of <customer> page.

Maintaining the Contact List

Use the Contacts page (RD_CONSUMER_REP, RD_COMPANY_CNTCT_2 or RD_SITE_CNTCT_2) to maintain the list of contacts for a person, company, or site.

Navigation

- Customers CRM, Add Person or Search Person, Person, Details or Summary

Click the Add Consumer Information or Edit Consumer Information link.

Select the Contact Info tab and click the Contacts link.

- Customers CRM, Add Company or Search Company, Company, Details or Summary

Select the Contact Info tab, and click the Contacts link.

- Customers CRM, Add Site or Search Site, Site, Primary

Select the Contact Info tab.

Click the Contacts link.

Image: Contact Info - Contacts page

This example illustrates the fields and controls on the Contact Info - Contacts page. You can find definitions for the fields and controls later on this page.

Person (Consumer)

Save | 360 360-Degree View | Search | Previous | Next | My Contacts | >> | Personalize

Name Kelsey Baker **Phone Number** 001-0015554442200
Email Address kbaker@bakerhousehold_htech.com **Customer ID** CHT22

Person | Account Team | Tasks | Call Reports | Billing Accounts | Plans | Notes | Contact Info | ▶

Person | Contacts | Sites

Contact Summary Customize | Find | View All | First 1 of 1 Last

Primary	Name	Phone	Email Address		
<input checked="" type="checkbox"/>	Jane Finch	925/694-1919		Edit	Inactivate

Add Contact

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

Create Contact of <object> Page

Use the Create Contact of <object> page (RBQ_QCREATE) to create a contact of a company, consumer, or site.

Navigation

Click the Create Entry button on the Contacts page for a company, consumer, or site.

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

This example illustrates the fields and controls on the Create Contact of <customer> page (1 of 2). You can find definitions for the fields and controls later on this page.

Create Contact Of Kelsey Baker

SetID HTECH
High Tech SetID

Consumer

Name [Kelsey Baker](#)
Currency US Dollar

Purchasing Options

<input checked="" type="checkbox"/> Sold To Customer	This consumer can make purchases.
<input checked="" type="checkbox"/> Bill To Customer	This consumer can receive bills.
<input checked="" type="checkbox"/> Ship To Customer	This consumer can receive shipments.

Contact Info Entries

Contact Info Entry Home Display Entry

Contact Info

Description Home

Type	Country Code	Number	Ext/PIN
Business	001	0015554442200	

Address

Address Business
11754 15th Ave NE
Seattle, WA 98125
[More...](#)

Email

Type	Email Address
Home	kbaker@bakerhousehold_htech.com

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

This example illustrates the fields and controls on the Create Contact of <customer> page (2 of 2). You can find definitions for the fields and controls later on this page.

Contact

[Search Existing Person](#)

Format for:

Prefix:

*First Name: Middle Name:

*Last Name: Suffix:

Title:

Purchasing Options

Sold To Contact: This contact can make purchases.

Bill To Contact: This contact can receive bills.

Ship to Contact: This contact can receive shipments.

Contact Info Entries

Contact Info

*Description:

Phone

*Type	Country Code	Number	Ext/PIN
<input type="text" value="Home"/>	<input type="text"/>	<input type="text"/>	<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"/>

Email

*Type	Email Address
<input type="text" value="Home"/>	<input type="text"/>
<input type="text" value="Other"/>	<input type="text"/>

Address

☐ Use Consumer Address

[Look up Address](#) [More...](#)

*Type:

*Country:

Address 1:

Address 2:

Address 3:

City:

County:

State: [Look up State](#)

Postal:

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

Contact

Enter contact information about the contact in this section.

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

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

Search Existing Person

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

Use <customer> Address

Select to use the customer's address for the contact.

Related Links

[Defining Information for Business Contacts](#)

Defining Customer Sites

This topic lists the pages used to maintain site lists.

Pages Used to Define Sites

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Company - Sites	RD_COMPANY_SITE_2	Maintain company sites.
Person - Sites	RD_CONSUMER_SITE_2	Maintain sites for a person. You can only maintain sites for a person with the consumer role.
Create Site of <customer>	RBQ_QCREATE	Add a site to a company or person. This page is similar in usage to the Create Contact of <customer> page.
Modify <site>	RBQ_QCREATE	Maintain contact information and purchasing options for a customer site.
Merge Request for Sites	RBQ_QCREATE	Submit two or more sites for merge evaluation.

Sites Page

Use the Sites page (RD_COMPANY_SITE_2) or (RD_CONSUMER_SITE_2) to maintain sites for a company or person.

Navigation

- Customers CRM, Add Company or Search Company, Company, Contact Info
Click the Sites link.
- Customers CRM, Add Person or Search Person, Person, Details or Summary
Click the Add Consumer Information or Edit Consumer Information link.
Select the Contact Info tab and click the Sites link.

Image: Company Sites page

This example illustrates the fields and controls on the Company Sites page. You can find definitions for the fields and controls later on this page.

Company

Save

360-Degree View

Search

Previous

Next

Add Company

Add to My Contacts

Add Task

>>

Personalize

Customer

MMA Property Management Group

Location

Circle Pines, MN, USA

Contact

Teri Thomas

Job Title

Management Associate

Phone

651/785-2546

Email

tthomas@mma.com

Company

Account Team

Tasks

Call Reports

Notes

Contact Info

Relationships

More Info

Attributes

Contacts

Company

Sites

Contact Summary

Personalize

Find

View All

First

1-6 of 6

Last

Primary	Name	Phone	Email Address		
<input type="checkbox"/>	Elssie Tripper	925/694-2001	crm_worker_24@ap6023fems.us.oracle.com	Edit	Inactivate
<input type="checkbox"/>	Alan Bailey			Edit	Inactivate
<input checked="" type="checkbox"/>	Teri Thomas	651/779-3232(4569)	tthomas@mma.com	Edit	Inactivate
<input type="checkbox"/>	Bill Hauser	651/785-9431	bhauser@mma.com	Edit	Inactivate
<input type="checkbox"/>	Barb Johnson	651/785-2344	bjohnson@mma.com	Edit	Inactivate
<input type="checkbox"/>	Fred Albright	651/785-6687	falbright@mma.com	Edit	Inactivate

Add Contact

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

Defining Purchasing Options for Companies, Consumers, and Sites

Understanding Purchasing Options

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

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

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

Purchasing Option Integrations

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

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

PeopleSoft Financial Management Solutions and PeopleSoft Supply Chain Management also enable you to define additional attributes and processing options and to view the updated information in PeopleSoft CRM. See *PeopleSoft FSCM: Application Fundamentals*.

Related Links

[Understanding the Company Component](#)

[Understanding Sites](#)

[Understanding Persons](#)

[Understanding Workers in CRM](#)

[Understanding Enterprise Integration Technology](#)

Defining Purchasing Options for Customers

This topic discusses how to define purchasing options.

Pages Used to Define Purchasing Options for Customers

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Company - Details	RD_COMPANY_DETAILS	Select purchasing options for the company.
Company - Purchasing Info	RD_COMPANY_CUST_OP	Enter purchasing option details for the company.
Site - Details	RD_SITE_MAIN_2	Select purchasing options for the site.
Site - Purchasing Info	RD_SITE_CUST_OP_2	Enter purchasing option details for the site.
Person - Details	RD_CONSUMER_BC_OPT	Enable purchasing options for the selected consumer. Purchasing options for Persons are available only for a person with the Consumer role.
Person - Purchasing Info	RD_CONSUMER_BC_OPT	Enable purchasing options for the selected consumer. Purchasing options for Persons are available only for a person with the Consumer role.

Purchasing Info Page

Use the Purchasing Info page (RD_COMPANY_CUST_OP) or (RD_SITE_CUST_OP_2), or (RD_CONSUMER_BC_OPT) to enter purchasing option details for the company, site, or consumer.

Navigation

- Customers CRM, Add Company or Search Company, Company
Click the Purchasing Info link.
- Customers CRM, Add Site or Search Site, Site
Click the Purchasing Info link.
- Customers CRM, Search Person, Add Person or Person
Click the Purchasing Info link on the Person page for a person with the Consumer role.

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

Image: Company - Purchasing Info page

This example illustrates the fields and controls on the Company - Purchasing Info page. You can find definitions for the fields and controls later on this page.

Company	Account Team	Tasks	Call Reports	Notes	Contact Info	Relationships	More Info	Attributes
Summary	Details	Purchasing Info	Tax Exempt Certificate					
Purchasing Options								
<input checked="" type="checkbox"/> Sold To Customer This company can make purchases. Sold To Options								
Send Purchases To								
Primary		Customer Name						
<input checked="" type="checkbox"/>		MMA Property Management Group		<input type="text"/> <input type="button" value="Search"/> <input type="button" value="+"/> <input type="button" value="-"/>				
Send Bills To								
Primary		Customer Name						
<input checked="" type="checkbox"/>		MMA Property Management Group		<input type="text"/> <input type="button" value="Search"/> <input type="button" value="+"/> <input type="button" value="-"/>				
<input checked="" type="checkbox"/> Bill To Customer This company can receive bills. Billing Options								
Receive Bills for Purchases Made By								
No customer selects this company for receiving bills.								
<input checked="" type="checkbox"/> Ship To Customer This company can receive shipments. Shipping Options								
Receive Shipments for Purchases Made By								
No customer selects this company for receiving shipments.								

Sold To Customer

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

Bill To Customer

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

Ship To Customer

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

Sold-To Options

Click the Sold-To Options link.

Image: Purchasing Info: Sold-To Options page

This example illustrates the fields and controls on the Purchasing Info: Sold-To Options page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Purchasing Info' tab within a PeopleSoft application. The 'Sold-To Options' section is active, showing a list of options with columns for 'Find', 'View All', 'First', '1 of 1', and 'Last'. The options are organized into several sections: 'Effective Date' (01/01/2000), 'Product ID Preference' (System Product ID, Customer Product ID), 'Freight Charge Method', 'Shipping Container Label', 'Carton Label Format', 'Pricing Options' (Discount Days, Exclusive Pricing ID), 'Arbitration Plan' (with a search icon), and 'Load Price Rule'.

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

Shipping Options

Click the Shipping Options link.

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

Billing Options

Click the Billing Options link.

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

Credit Analyst

Select the code for the credit analyst who works with the customer. This field is required for successful integration with Financial Management Solutions or Supply Chain Management.

See [Credit Analyst Page](#).

Collector

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

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

Payment Terms Code

Enter the payment terms for informational purposes.

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

Selecting Purchasing Options for Customer Addresses

This topic discusses how to select purchasing options for addresses.

Pages Used to Select Purchasing Options for Customer Addresses

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Contact Info Page</u>	ABE_DETAIL	<p>Select purchasing options that apply to an address of a company, site, or consumer.</p> <p>Purchasing options are available from the Person component only if the person has the Consumer role.</p>

Contact Info Page

Use the page Contact Info (ABE_DETAIL) to select purchasing options that apply to an address of a company, site, or consumer.

Navigation

- Customers CRM, Search Company, Company, Contact Info

Click the Addresses link.

Click a Description link.

- Customers CRM, Search Site, Site, Contact Info

Click the Addresses link.

Click a Description link.

- Customers CRM, Search Person, Person, Summary

Click the Add Consumer Information link.

Select the Contact Info tab.

Click the Addresses link.

Click a Description link.

See [Maintaining Contact Information for Business Objects](#).

Selecting Purchasing Options for Customer Contacts

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

Pages Used to Select Purchasing Options for Customer Contacts

Page Name	Definition Name	Usage
Person - Contacts	RD_CONSUMER_REP	Maintain the list of contacts for a person. You can only define contacts for a person with the Consumer role.
Company - Contacts	RD_COMPANY_CNTCT_2	Maintain the list of contacts for a company.
Site - Contacts	RD_SITE_CNTCT_2	Maintain the list of contacts for a site.
Contact Info Page	ABE_DETAIL	Select purchasing options that apply to an address of a company, site, or person.
Maintain Contact Page	RBQ_QCREATE	Maintain purchasing options for a contact. Designate a contact as primary for a purchasing option.

Contact Info Page

Use the Contact Info page (ABE_DETAIL) to select purchasing options that apply to an address of a company, site, or person.

Navigation

Click the Add Contact button next to a listed contact on the Contacts page for a company, site, or person with the Consumer role.

See [Maintaining Contact Information for Business Objects](#).

Maintain Contact Page

Use the Maintain Contact page (RBQ_QCREATE) to maintain purchasing options for a contact.

Designate a contact as primary for a purchasing option.

Navigation

Click the Edit Contact button next to a listed contact on the Contacts page for a company, site, or person with the consumer role.

See [Defining Customer Contacts](#).

Selecting Purchasing Options for Customer Sites

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

Pages Used to Select Purchasing Options for Customer Sites

Page Name	Definition Name	Usage
Company - Sites	RD_COMPANY_SITE_2	Maintain company sites.
Person - Sites	RD_CONSUMER_SITE_2	Maintain sites for a person. You can only maintain sites for a person with the Consumer role.
Company - Edit Site Person - Edit Site	RD_CUST_SITE_DTL	Select purchasing options for a customer site. Purchasing options are available from the Person component only if the person has the Consumer role.
Company - Create Site Person - Create Site	RD_CUST_SITE_DTL	Select purchasing options for a customer site.

Related Links

[Defining Customer Sites](#)

Contact Info Page

Access the Contact Info page for a customer site.

See [Defining Customer Sites](#).

Chapter 6

Defining Tax Exempt Certificate Information for Companies, Consumers and Sites

Understanding Tax Exempt Certificates

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

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

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

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

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

Working with Tax Exempt Certificate Information

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

Page Used to Work with Tax Exempt Certificate Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Tax Exempt Certificate Page</u>	RD_TAX_EXEMPT_COMP	Add, delete, or modify Tax Exempt Certificate information.

Tax Exempt Certificate Page

Use the Tax Exempt Certificate page (RD_TAX_EXEMPT_COMP) to add, delete, or modify Tax Exempt Certificate information.

Navigation

Click the Tax Exempt Certificate link on the Company - Summary page.

Click the Tax Exempt Certificate link on the Consumer - Summary page.

Click the Tax Exempt Certificate link on the Site - Summary page.

Image: Tax Exempt Certificate page

This example illustrates the fields and controls on the Tax Exempt Certificate page. You can find definitions for the fields and controls later on this page.

The screenshot shows a CRM interface for a company named 'MMA Property Management Group'. The contact is 'Teri Thomas' with phone '651/785-2546' and email 'tthomas@mma.com'. The location is 'Circle Pines, MN, USA' and job title is 'Management Associate'. The 'Tax Exempt Certificate' tab is selected, showing a table with one row for an exemption certificate. The fields are: '*Exemption Certificate' (text input), 'Issuing Authority' (text input), and 'Authority Type' (dropdown menu set to 'Federal'). There is an 'Add Certificate Data' button and a search bar at the top right.

Exemption Certificate and Issuing Authority

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

Tax Exempt Category

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

- *Blanket*: Exemption category exists for all purchases of this type.
- *Single Purchase*: Exemption category exists for the specified purchase only.
- *Other*: You've defined another exemption category.

Exempt License

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

Working with Business Object Profiles

Understanding Profiles

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

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

System and User-Defined Profile Data

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

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

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

Profile Usage

Consider these examples of the various ways to use profiles.

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

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

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

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

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

Profiles and Marketing Center Security

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

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

See the product documentation for *PeopleSoft EPM CRM Warehouse*.

Related Links

PeopleSoft Online Marketing

PeopleSoft Marketing

[Understanding the Data Import Application Engine Process \(RBIMPORT\)](#)

Profile Data in the CDM

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

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

See "Understanding AAF" (PeopleSoft CRM 9.2: Automation and Configuration Tools) and "Understanding the Use of Active Analytics Framework in CRM" (PeopleSoft CRM 9.2: Automation and Configuration Tools).

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

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

Related Links

"Understanding the Configurable Search" (PeopleSoft CRM 9.2: Automation and Configuration Tools)

Common Elements Used When Working With Profiles

This topic lists common elements used in these topics and discusses profile data in the customer data model (CDM).

Profile Field

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

Profile Group

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

Condition

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

For example, the condition for displaying the Contact Lens Info profile group in the Consumer component is that the consumer

either previously purchased contact lenses or has requested contact lens information.

Specifying a Profile Prefix

This topic discusses how to specify a profile prefix.

Page Used to Specify a Profile Prefix

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Profile Setup Page	RA_PROFILE_SETUP	Specify a profile record prefix for manually mapped user-defined profile records (tables).

Profile Setup Page

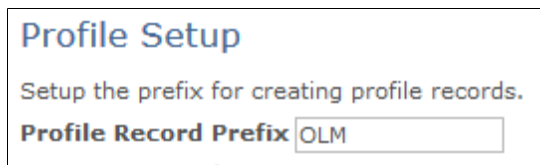
Use the Profile Setup page (RA_PROFILE_SETUP) to specify a profile record prefix for manually mapped user-defined profile records (tables).

Navigation

Set Up CRM, Common Definitions, Profile Management, Profile Setup

Image: Profile Setup page

This example illustrates the fields and controls on the Profile Setup page. You can find definitions for the fields and controls later on this page.



The screenshot shows a web form titled "Profile Setup" with the subtitle "Setup the prefix for creating profile records." Below this, there is a label "Profile Record Prefix" followed by a text input field containing the value "OLM".

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

Creating a Profile Request

These topics provide an overview of profile requests and discuss how to:

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

- Modify active profiles.

Pages Used to Create a Profile Request

Page Name	Definition Name	Usage
Profiles	RA_PROFILE_SUMM	View summary information about all of your profiles and to access an existing profile or create a new profile.
<u>Profile Page</u>	RA_PROFILE_DTL	Define basic information about the profile.
<u>Profile Fields - Field Summary Page</u>	RA_ATTRIBUTE_SUMM	Add new fields to a profile, or view existing profile fields.
<u>Profile Fields - Field Detail Page</u>	RA_ATTRIBUTE_DTL	Define a new profile field or edit an existing profile field.
<u>Profile - Marketing Center Page</u>	RA_PROFILE_MKTCTR	Secure a profile by Marketing Center.

Understanding Profile Requests

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

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

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

Profile Page

Use the Profile page (RA_PROFILE_DTL) to define basic information about the profile.

Navigation

Set Up CRM, Common Definitions, Profile Management, Profile Definitions

- Click the profile name on the Profiles page to edit an existing profile.
- Click the Add Profile button on the Profiles page to define a new profile.

Image: Profile page

This example illustrates the fields and controls on the Profile page. You can find definitions for the fields and controls later on this page.

Group Type

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

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

Category

Shows the category to which the profile belongs.

Status

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

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

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

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

Select *Update* to edit an activated profile.

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

Profile Name

Enter a name for the profile.

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

Rows

Row selection determines how many unique rows of data you can enter into the profile table for each contact. You can define profiles as either one row or many rows. After a profile is requested, you cannot change the row selection.

Select *Many Rows* to allow multiple rows of data per contact.

Select *One Row* to allow only one row of data per contact.

For example, suppose that you use a one-row table to store information about whether your customer is a pet owner and how many pets your customer owns. If you want to store the names of the pets, you must allow for the possibility that your customer has more than one dog or cat. To record the names of multiple pets, you must use a Many Row table.

Note: Profiles defined as *Many Rows* can be used only for audience selection. They cannot be used in online documents by PeopleSoft Online Marketing.

Profile Can Be Updated

Select this check box if the profile is available for update (for example, by customers changing their information on an Online Marketing web page form). If you mark profiles to not allow updates, the profile fields cannot be marked as questions.

Secured Profile

Select this check box to designate a profile as secured. When performing a search for profiles, only those secured profiles that a user has permission to access (that is, that they are authorized for at least one of the Marketing Centers associated with the profile) will be displayed as part of the search results.

Profile Fields - Field Summary Page

Use the Profile Fields - Field Summary page (RA_ATTRIBUTE_SUMM) to add new fields to a profile, or view existing profile fields.

Navigation

Select the Profile Fields tab on the Profile page.

Image: Profile Fields - Field Summary page

This example illustrates the fields and controls on the Profile Fields - Field Summary page. You can find definitions for the fields and controls later on this page.

Profiles

Save

Refresh

Add Profile

Clone Profile

View All

Personalize

Group Type

Individuals

Profile Name

People

Rows Per Contact

One row

Status

Activated

Profile

Profile Fields

Field Summary

Field Detail

Profile Fields

Personalize

Find

View All

First

1-40 of 53

Last

Order	Name	Use Type	Description	Parent Name	Field Status
1	SetID	Text	Setid		Active
2	Role Type	Choose One (with Rating)	Role Type		Active
3	External ID	Text	Alphanumeric identifier used to match person to an external system		Active
4	Source ID	Integer	Identifies the list or campaign that is the source of the name.		Active
5	First Name	Text	First Name		Active
6	Last Name	Text	Last Name		Active
7	Middle Name	Text	Middle Name		Active
8	Suffix	Text	Suffix (Jr., MD, etc.)		Active
9	Salutation	Text	Salutation (Mr., Ms., etc.)		Active
10	Social Security Number	Text	Social Security Number		Active
11	Gender	Choose One	Gender		Active
12	Email	Text	Email		Active
13	Email Alternative	Text	Email Alternative		Active
14	Email Domain	Text	Includes all characters after the @ symbol in an email address		Active

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

Field Detail

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

Order

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

Name

Click the field name to access the profile field detail.

Use Type

Defines how to use the new fields. Values are:

- *Choose Many*: Defines a choice field that allows the respondent to select more than one response from a list of options.
- *Choose One*: Defines a choice field that allows the respondent to select only one response from a list of options.
- *Choose One (with rating)*: Defines a choice field that allows the respondent to select only one response from a list of options and assigns a numeric value to the choice. Also, specifies a numeric value associated with the choices. These values are to be used in the generated results.

- *Date*: Defines an entry field for a date.
- *Decimal*: Defines an entry field for numbers that allows decimal positions. An example is a currency entry.
- *File*: Defines an entry field for uploaded files.
- *Integer*: Defines an entry field for numbers that do not allow decimal positions. An example is a response to the question: How many children do you have?
- *Map to Existing Field*: Defines a choice field that relies on a prompt table for response options. Prompt tables are useful when the response options are numerous. For example, you can use a prompt table field for state and country responses. Some common prompt tables (such as state and country) already exist within the system. If a prompt table does not exist, your system administrator will have to build it.

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

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

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

- *Text Block*: Defines an entry field that allows the respondent to enter a free-form text response. You must specify a field length. The maximum field length must be less than 32,700 characters.
- *Time*: Defines an entry field to receive a response in a time format.
- *Yes/No*: Defines a choice field for which the responses are either yes or no.

Parent Name

Use this drop-down field to specify a relationship among field choices (for example, you could specify that a field named College is the parent of a Department field, and the Department field is in turn the parent of a field named Major). You can

define three levels of hierarchy using this field; it appears only for fields of type *Choose One* and *Choose One with Rating*.

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

Field Status

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

Profile Fields - Field Detail Page

Use the Profile Fields - Field Detail page (RA_ATTRIBUTE_DTL) to define a new profile field or edit an existing profile field.

Navigation

Click the Field Detail link on the Profile Fields - Field Summary page.

Image: Profile Fields - Field Detail page

This example illustrates the fields and controls on the Profile Fields - Field Detail page. You can find definitions for the fields and controls later on this page.

Profiles

SaveRefresh

Add ProfileClone ProfileView All

Personalize

Group TypeIndividuals

Profile NamePeople

Rows Per ContactOne row

StatusActivated

Profile

Profile Fields

Field Summary

Field Detail

Field Detail

FindView All

First1 of 53Last

NameSetID

Field StatusActive

Field TypeText

☐ Profile Question

DescriptionSetid

QuestionSetid

Length5

Name

Enter a name for the field.

Field Status

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

You can alter the profile field value when the field status is *In Design* or *Update*. When a profile is activated, all profile field statuses change to *Active*. To alter a profile field value, change the status of the profile to *Update*, then change the profile field status to *Update*.

Use Type	The use type value that you selected when you added the new field appears as the default value. Until the profile is activated, select a new option to change the field type.
Profile Question	Select to make this field available for use in a web document or email blast.
Description	Enter a description of the field. The description appears on the Profile Fields - Field Summary page.
Question	If the profile field is specified as a profile question (the Profile Question check box is selected), enter a question that is designed to elicit a desired response. For example, if the value for the profile field is <i>Number of Pets</i> , your question might be: “How many pets are in your household?”

The following fields appear only with certain use types.

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

Modifying Active Profiles

You can make the following changes to activated profiles:

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

- Add a new profile field.

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

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

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

Making Changes That Do Not Require a New Request

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

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

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

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

3. Make the change.

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

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

Adding a New Profile Field

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

To add a new profile field to an existing profile:

1. Change the status of the profile to *Update*.
2. On the Profile Fields - Field Summary page, select the use type for the field that you want to add and click the Add a New Field button.
3. Enter the field information and save the page.
4. Return to the Profile page, change the profile status to *Requested*, and save the profile.

Profile - Marketing Center Page

Use the Profile - Marketing Center page (RA_PROFILE_MKTCTR) to secure a profile by Marketing Center.

Navigation

Click the Marketing Center tab on the Profile page.

Image: Profile - Marketing Center page

This example illustrates the fields and controls on the Profile - Marketing Center page. You can find definitions for the fields and controls later on this page.

Marketing Center

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

Add Marketing Center

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

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

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

Registering a Profile

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

Note: *Map to Existing Field* field value types rely on an underlying prompt table for field values. *Choose Many* field value types rely on a child table for field values.

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

Critical Information for System Administrators

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

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

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

Profile Field Type	PeopleTools Field Type	Notes
<i>Choose Many</i>	NA	Separate child table is needed. No new fields are required for the profile record.
<i>Choose One</i>	Char (254)	
<i>Choose One with Rating</i>	Number (18,0)	Must be signed.
<i>Date</i>	Date	
<i>Decimal</i>	Number (18,4)	Must be signed.
<i>File</i>	Char (254)	
<i>Integer</i>	Number (18,0)	Must be signed.
<i>Map Field Choice to Prompt</i>	Char (x)	Map Field Choice to Prompt fields cannot be included in profile tables with any other type of field. Oracle recommends that you create a view for this data rather than a profile table. The field that is referenced determines the PeopleTools field type. See the section related to building views in the PeopleSoft Application Designer documentation.
<i>Text</i>	Char (X)	X represents the desired field length as defined in the profile definition request .
<i>Text Block</i>	Long Character	
<i>Time</i>	Time	
<i>Yes/No</i>	Char (1)	

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

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

At the end of the record, include the RB_AUDIT_SBR subrecord. Also, you must create a new index. When you create the index, add comments and make sure that the clustered and unique check boxes are deselected. Add the BO_ID field to the index.

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

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

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

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

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

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

Pages Used to Register a Profile

Page Name	Definition Name	Usage
Profiles Page	RA_PROFILE_DTL	View the profiles that are registered.
Profile Registration - Profile Fields - Field Summary	RA_ATTRIBUTE_SUMM	Enter or view summary information about profile fields.
Profile Registration - Profile Fields - Field Detail	RA_ATTRIBUTE_DTL	Enter or view detailed information about profile fields.

Profiles Page

Use the Profiles page (RA_PROFILE_DTL) to view the profiles that are registered.

Navigation

Set Up CRM, Common Definitions, Profile Management, Profile Registration, Profiles

Image: Profiles page

This example illustrates the fields and controls on the Profiles page. You can find definitions for the fields and controls later on this page.

Profiles

*Profile Category: Individuals

Individuals Personalize | Find | View All | First 1-25 of 28 Last

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

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

Profile Registration - Profile Page

Use the Profile Registration - Profile Fields - Field Summary page (RA_ATTRIBUTE_SUMM) to enter or view summary information about profile fields.

Navigation

- Click a Profile Name link on the Profile page.
- Click the Field Summary link on the Profile Fields - Field Detail page.

Image: Profile Registration - Profile page

This example illustrates the fields and controls on the Profile Registration - Profile page. You can find definitions for the fields and controls later on this page.

Profile Registration

Save

Refresh

View All

Personalize

Group Type

Individuals

Profile Name

People

Rows Per Contact

One row

Status

Activated

Profile

Profile Fields

Profile

Category

Individuals

Profile Name

People

Description

Individuals:People Profile

Create Profile Automatically

Create/Map Profile Manually

Record Name

BO_BASIC_IND

Status

Activated

Transfer to Design Profile

Rows

One row

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

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

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

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

Create Profile Automatically Select to generate the profile record to use to store the profile information automatically.

Create/Map profile Manually Select to map the profile and the record where the profile information is stored manually.

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

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

Profile Registration - Profile Fields Page

Use the Profile Registration - Profile Fields - Field Detail page (RA_ATTRIBUTE_DTL) to enter or view detailed information about profile fields.

Navigation

Click the Field Detail link on the Profile Fields - Field Summary page.

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

Image: Profile Registration - Profile Fields page

This example illustrates the fields and controls on the Profile Registration - Profile Fields page. You can find definitions for the fields and controls later on this page.

Profile Registration

Save Refresh | View All Personalize

Group Type: Individuals Profile Name: People
Rows Per Contact: One row Status: Activated

Profile Profile Fields

Field Summary Field Detail

Profile Fields Personalize Find View All First 1-40 of 53 Last

Order	Name	Record Name	Field Name	Use Type	Field Status
1	SetID	BO_BASIC_IND	SETID	Text	Active
2	Role Type	BO_BASIC_IND	ROLE_TYPE_ID	Choose One (with Rating)	Active
3	External ID	BO_BASIC_IND	EXTERNAL_LIST_ID	Text	Active
4	Source ID	BO_BASIC_IND	SOURCE_SYSID	Integer	Active
5	First Name	BO_BASIC_IND	FIRST_NAME	Text	Active
6	Last Name	BO_BASIC_IND	LAST_NAME	Text	Active
7	Middle Name	BO_BASIC_IND	MIDDLE_NAME	Text	Active
8	Suffix	BO_BASIC_IND	NAME_SUFFIX	Text	Active
9	Salutation	BO_BASIC_IND	NAME_PREFIX	Text	Active
10	Social Security Number	BO_BASIC_IND	SSN	Text	Active
11	Gender	BO_BASIC_IND	SEX	Choose One	Active
12	Email	BO_BASIC_IND	EMAIL_ADDR	Text	Active
13	Email Alternative	BO_BASIC_IND	EMAIL_ADDR_ALT	Text	Active
14	Email Domain	BO_BASIC_IND	EMAIL_DOMAIN	Text	Active
15	Address1	BO_BASIC_IND	ADDRESS1	Text	Active

Name

Displays the profile field name.

Record Name

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

Field Name

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

Delete

Click to remove a profile field.

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

Completing the Activation Process

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

Setting Up Profile Groups

This topic discusses how to set up profile groups.

Pages Used to Set Up Profile Groups

Page Name	Definition Name	Usage
<u>Define Profile Group Page</u>	RA_PRFL_DEF_PG1	Define profile groups.
<u>Define Profile Group - Add Profile Field Page</u>	RA_PRFL_FLD_SEC	Select profile fields to add to a profile group.
<u>Assign Profile Group Display Page</u>	RA_CMPT_PRFL_PG	Assign profile groups to a CDM component.
<u>Assign Profile Group Display - Edit Condition Page</u>	RA_CND_BLD_PG	Specify the conditions under which the profile group fields appear on the More Info or Summary page or leave blank.

Define Profile Group Page

Use the Define Profile Group page (RA_PRFL_DEF_PG1) to define profile groups.

Navigation

Set Up CRM, Common Definitions, Profile Management, Profile Groups, Define Profile Group

Image: Define Profile Group page

This example illustrates the fields and controls on the Define Profile Group page. You can find definitions for the fields and controls later on this page.

Define Profile Group

Specify Profile Group Information

*Group Name

Customer Value

*Category

Individuals

Description

Customer Value

Column One Contents

No Profile Fields have been Selected.

Add Profile Field

Column Two Contents

No Profile Fields have been Selected.

Add Profile Field

Audit History

Created	04/05/2004 3:15PM PDT	By JDIAMOND	Jack Diamond
Modified	04/05/2004 3:15PM PDT	By JDIAMOND	Jack Diamond

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

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

Define Profile Group - Add Profile Field Page

Use the Define Profile Group - Add Profile Field page (RA_PRFL_FLD_SEC) to select profile fields to add to a profile group.

Navigation

Click the Add Profile Field button on the Define Profile Group page.

Image: Define Profile Group - Add Profile Field page

This example illustrates the fields and controls on the Define Profile Group - Add Profile Field page. You can find definitions for the fields and controls later on this page.

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

Assign Profile Group Display Page

Use the Assign Profile Group Display page (RA_CMPT_PRFL_PG) to assign profile groups to a CDM component.

Navigation

Set Up CRM, Common Definitions, Profile Management, Profile Groups, Assign Profile Group Display

Image: Assign Profile Group Display page

This example illustrates the fields and controls on the Assign Profile Group Display page. You can find definitions for the fields and controls later on this page.

Assign Profile Group Display

Component: Company

Profile Groups for Summary Page						
*Sequence	Purchasing History	Read-Only	Display Condition	Edit Condition	Clear Condition	
1	Purchasing History	<input checked="" type="checkbox"/>				

Profile Group Name: Purchasing History Add

Profile Groups for More Info Page

No Profile Groups have been Added.

Profile Group Name: Add

Save

Note: The fields in the Profile Groups for Summary Page region are available for the Company component only.

Add

Click to add a profile group to the component.



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

Assign Profile Group Display - Edit Condition Page

Use the Assign Profile Group Display - Edit Condition page (RA_CND_BLD_PG) to specify the conditions under which the profile group fields appear on the More Info or Summary page or leave blank.

Navigation

Click the Edit Condition button next to a profile group on the Assign Profile Group Display - Assign Profile Group Display page.

Image: Assign Profile Group Display - Edit Condition page

This example illustrates the fields and controls on the Assign Profile Group Display - Edit Condition page. You can find definitions for the fields and controls later on this page.

Assign Profile Group Display

Edit Condition

Component Company **Profile Group Name** Purchasing History

[Switch to Advanced Mode](#)

Term	Operator	Value
Select Term		

First 1 of 1 Last

+ -

Done Cancel

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

Switch to Advanced Mode

Click to specify complex conditions.

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

Related Links

"Understanding AAF" (PeopleSoft CRM 9.2: Automation and Configuration Tools)

"Understanding the Use of Active Analytics Framework in CRM" (PeopleSoft CRM 9.2: Automation and Configuration Tools)

Viewing and Updating Profile Data

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

Pages Used to View and Update Profile Data

Page Name	Definition Name	Usage
Company - More Info	RD_PROFILE	View and update profile information.
Person - More Info		
Company - Summary	RD_COMPANY_SUMMARY	View profile information for a company.

More Info Page

Use the More Info page (RD_PROFILE) to view and update profile information.

Navigation

- Customers CRM, Search Company, Company, More Info
- Customers CRM, Search Person, Person, More Info

Inserting and Updating Rows in Profiles

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

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

Page Used to Insert and Update Rows in Profiles

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Manage Profile Updates Page</u>	RA_PROF_UPD	Insert and update rows in single row and multi row profiles.

Manage Profile Updates Page

Use the Manage Profile Updates page (RA_PROF_UPD) to insert and update rows in single row and multi row profiles.

Navigation

Marketing, Manage Profile Updates

Image: Manage Profile Updates page

This example illustrates the fields and controls on the Manage Profile Updates page. You can find definitions for the fields and controls later on this page.

Profile Update Name

Enter a descriptive name for the profile update.

Description

Enter a description for the profile update.

Status

The current profile status.

Profile

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

Audience

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

Single Row Profile Updates

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

Profile Field Values

Select the profile field, then enter the value to which you want to change it. If a row currently exists for a person, then that row

will be updated; if a row does not currently exist, then a new row with the field values set will be inserted.

If you only want to update existing rows, you can select an audience where single rows currently exist (so the processing will be updated only upon execution).

Add Profile Field Value

Click this button to add another profile field value row.

Multi Row Profile Updates

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

Image: Manage Profile Updates page with multi-row profile options

This example illustrates the fields and controls on the Manage Profile Updates page with multi-row profile options. You can find definitions for the fields and controls later on this page.

Manage Profile Updates

Save | Search | Next | Add | Personalize

Profile Update Name Fall 2010 Event Brochure Sent **Status** Completed
Description **Created Date/Time** 09/10/2009 3:09PM

Profile Update Name Fall 2010 Event Brochure Sent
Description
Status Completed
Profile Brochure Fall 2010 Brochure Status for Fall 2010 Events
Audience Fall 2010 Event : Inv

Profile Field Values Find First 1-3 of 3 Last

	Profile Field Name	Operator	Value
Set	Brochure Sent	equal to	Yes
Set	Event Id	equal to	EVT0000000010006
Set	Business Unit	equal to	PSUNV

Selection Criteria Find First 1 of 1 Last

	Profile Field Name	Operator	Value

Row Not Found Action

☒ Insert new row if existing row not found
☐ No action if existing row not found

Generation Log 2009-09-10 15:09:33 -- 0 rows updated, 28 rows inserted, 28 person profiles updated
 2009-09-10 15:09:08 -- 0 rows would be updated, 28 rows would be inserted, 28 person profiles would be updated

Selection Criteria

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

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

Row Not Found Action

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

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

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

Executing the Profile Update

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

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

Execute

Click this button to perform the specified profile update.

Preview Count

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

You can only use this option for static audiences.

Date, Time

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

Now

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

State Changes for Profile Updater

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

<i>From State</i>	<i>To State</i>	<i>State Processing</i>
In Design	Queued	This status change occurs automatically when you click the Execute button to process either Now or for a future date.
Queued	Processing	The update is in process.
Processing	Completed	This status change occurs by the Application Engine Profile Updater process when the update completes successfully. When the profile update is in this state, no changes are allowed to the profile update (page is display only).
Processing	Failed	This status change occurs by the Application Engine Profile Updater process when the update completes but is not successful. When the profile update is in this state, the only change that the user can make is to change Status back to <i>In Design</i> .
Processing	Aborted	This status change occurs by the Application Engine Profile Updater process when the process ends unexpectedly. When the profile update is in this state, only change that can be made by the user is to change Status back to <i>In Design</i> .
Completed	None	When the profile update is in this state, no changes are allowed to it (page is display only).
Failed	In Design	This status change can be manually made by the user. It is required before the process can be run again.
Aborted	In Design	This status change can be manually made by the user. It is required before the process can be run again.

Working with the Relationship Viewer

Understanding the Relationship Viewer

These topics discuss:

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

Purpose of the Relationship Viewer

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

Types of Relationships

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

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

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

You can monitor relevant peer-to-peer relationships instead of viewing the entire set of indirect relationships. To continue the softball example, if the relationship viewer is configured to show direct relationships and peer-to-peer relationships, the relationship view shows that each player has a direct

relationship to the company and a peer-to-peer relationship to the other players on the team. If you do not establish the peer-to-peer relationship among team members, you can only view all indirect relationships between each employee of the company, and you cannot identify which employees have a team member relationship to each other.

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

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

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

Implicit and Explicit Relationships

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

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

Roles in the Relationship Viewer

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

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

PeopleSoft CRM Sample Relationship Views

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

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

Configuring Relationship Views

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

This topic discusses how to configure relationship views.

Page Used to Configure Relationship Views

Page Name	Definition Name	Usage
<u>Configure Relationship Views Page</u>	BO_REL_VWCFG	Create relationship views. The relationship view defines the tree that appears in a pane of the Relationship Viewer page.

Configure Relationship Views Page

Use the Configure Relationship Views page (BO_REL_VWCFG) to create relationship views. The relationship view defines the tree that appears in a pane of the Relationship Viewer page.

Navigation

Set Up CRM, Common Definitions, Customer, Configure Relationship Views, Configure Relationship Views

Image: Configure Relationship Views page

This example illustrates the fields and controls on the Configure Relationship Views page. You can find definitions for the fields and controls later on this page.

Configure Relationship Views

Description

*Relationship View

*Description

*Maximum Rows

☐ Enforce Top Node

Levels/Roles Find | View All First 1 of 2 Last

*Level

Sequence

*Role

Maximum Rows

Folder Label

☒ Role Type

☐ Custom Name

☐ None

Maximum Rows

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

Levels/Roles

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

Level

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

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

Parent

Select the parent node for which this role and relationship pair appears in the tree.

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

Folder Label

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

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

Relationships

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

Relationship Type	Select the relationship type for this role.
--------------------------	---

Search Criteria/Quick Create Template

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

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

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

Configuring the Relationship Viewer

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

These topics discuss how to:

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

Pages Used to Configure the Relationship Viewer

Page Name	Definition Name	Usage
<u>Role Type - Default Views Page</u>	BO_REL_ROLEDFLT	Specify the default views that appear in both sections of the Relationship Viewer page and specify the views that are to appear in the Select View list on the Relationship Viewer page. You can use a relationship view in more than one market.
<u>Role Priority - Role Priorities Page</u>	BO_REL_ROLEPRIORITY	Prioritize roles to determine the default relationship views that appear in the relationship viewer.

Role Type - Default Views Page

Use the Role Type - Default Views page (BO_REL_ROLEDFLT) to specify the default views that appear in both sections of the Relationship Viewer page and specify the views that are to appear in the Select View list on the Relationship Viewer page.

You can use a relationship view in more than one market.

Navigation

Set Up CRM, Common Definitions, Customer, Role Type, Default Views

Image: Role Type - Default Views page

This example illustrates the fields and controls on the Role Type - Default Views page. You can find definitions for the fields and controls later on this page.

Relationship Viewer Page Defaults

Role Type ID

Role Company

Page Defaults
Personalize | View All |
 First 1-22 of 22 Last

Market	Relationship View Name	Default Pane 1	Default Pane 2	Pane 1	Pane 2	All Panes
Communications	BILL_ACCT_ADMIN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communications	COMPANY HIERARCHY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Communications	CONTACT VIEW	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Communications	CUST_HIERARCHY	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Energy	BILL_ACCT_ADMIN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Energy	COMPANY HIERARCHY	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Energy	CONTACT VIEW	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Energy	MULTI-COMPANY VIEW	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Energy	PARTNER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Energy	SITE VIEW	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Financial Services	COMPANY HIERARCHY	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial Services	CONTACT VIEW	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Financial Services	MULTI-COMPANY VIEW	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial Services	PARTNER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Financial Services	SITE VIEW	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Relationship View Name

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

Default Pane 1

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

Default Pane 2

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

Pane 1

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

Pane 2

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

All Panes

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

Role Priority - Role Priorities Page

Use the Role Priority - Role Priorities page (BO_REL_ROLEPRIORITY) to prioritize roles to determine the default relationship views that appear in the relationship viewer.

Navigation

Set Up CRM, Common Definitions, Customer, Role Priority, Role Priorities

Priority

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

Viewing and Maintaining Relationships and Roles

These topics discuss how to:

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

Pages Used to View and Maintain Relationships and Roles

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Relationship Viewer Page</u>	BO_REL_VIEW	View and maintain current relationships for a specified business object.
Company - Relationships	RD_COMPANY_REL	View and maintain current relationships for a specified business object.
Consumer - Relationships	RD_PERSON_REL	View and maintain current relationships for a specified business object.
Contact - Relationships	RD_PERSON_REL	View and maintain current relationships for a specified business object.
Site - Relationships	RD_SITE_REL_2	View and maintain current relationships for a specified business object.
Business Object - Relationships	BO_REL	View and maintain current relationships for a specified business object.
360-Degree View - Relationship Viewer	RB_TD_REL_VIEWER	View and maintain current relationships for a specified business object.
Create New <relationship> of <object>	BO_REL_VIEW_3	Add a new relationship.
Relationship Viewer - Update <relationship>	BO_REL_VIEW_2	Update the relationship. You can modify the start date or end date for the relationship.

Page Name	Definition Name	Usage
Maintain Roles Page	MAINTAIN_ROLE_SEC	Maintain roles for a specified business object.
360-Degree View	RB_TD_AGENT_VIEW	Access the 360-degree view of the specified business object.

Relationship Viewer Page

Use the Relationship Viewer page (BO_REL_VIEW) to view and maintain current relationships for a specified business object.

Navigation

Customers CRM, Relationship Viewer

Image: Relationship Viewer page

This example illustrates the fields and controls on the Relationship Viewer page. You can find definitions for the fields and controls later on this page.

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

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

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

See [Configuring Relationship Views](#).

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

View Detail

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

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

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

See [Role Type Page](#).

Add New <relationship>

Click to add a new relationship.

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

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

See [Configure Relationship Views Page](#).

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

See [Viewing and Maintaining Relationships and Roles](#).



Click to update the relationship.



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

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

Maintain Roles Page

Use the Maintain Roles page (MAINTAIN_ROLE_SEC) to maintain roles for a specified business object.

Navigation

Click the Maintain Roles link on the Relationship Viewer page or a Relationships page for a component or a Relationships page for a component.

Image: Relationship Viewer - Maintain Roles page

This example illustrates the fields and controls on the Relationship Viewer - Maintain Roles page. You can find definitions for the fields and controls later on this page.

Maintain Roles

MMA Property Management Group

Current Roles

Role	Start Date	End Date
Company	01/01/1900	
Business Contact (ORG)	01/01/1900	
Ship To Organization	01/01/1900	
Sold To Organization	01/01/1900	
Bill To Organization	01/01/1900	

Add or Reactivate Role Information

Role

Start Date

End Date

Add or Reactivate

[Return to Relationship Viewer](#)

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

Inactivate

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

Add or Reactivate Role Information

Role

Select the role to add or reactivate for this business object.

Start Date and End Date

Enter the start and end date that this role is in effect.

Add or Reactivate

Click this button after you select the role and the start and end date to add or reactivate the role that is for the specified business object.

Chapter 9

Defining Company Business Objects

Understanding the Company Component

This topic discusses company information.

Company Information

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

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

See [Understanding Name and Address Information in CRM](#).

Sites

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

Contacts

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

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

Attributes

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

Integrations

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

Defining Company Information

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

These topics discuss how to:

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

Pages Used to Define Company Information

Page Name	Definition Name	Usage
<u>Company Search Page</u>	RD_COMPANY_GSRCH	Access an existing company.
<u>Company - Summary: Summary Page</u>	RD_COMPANY_SUMMARY	View summary information about the company.
<u>Company - Summary: Details Page</u>	RD_COMPANY_DETAILS	Maintain general information about the company.
Company - Purchasing Options	RD_COMPANY_CUST_OP	Maintain the company's purchasing information.
<u>Company - Tax Exempt Certificate Page</u>	RD_TAX_EXEMPT_COMP	Maintain the company's tax exempt information.

Page Name	Definition Name	Usage
Company - Account Team	RD_ACCOUNT_TEAM	Manage the account team that is assigned to the company.
<u>Company - Tasks Page</u>	RD_TASK_LIST	Manage sales team tasks for a company.
<u>Company - Call Reports Page</u>	RD_CALLRPT_LST_TXN	View a list of call reports for which the company contacts are named as participants.
Company - Billing Accounts	RBT_COMACT_LIST	View a list of billing accounts for the company.
<u>Company - Notes Page</u>	RD_COMPANY_NOTE_2	Maintain notes and attachments for the company.
<u>Company - Contact Info Page</u>	RD_COMP_ADDR_BOOK	Manage company contacts, addresses, and sites.
<u>Company - Relationships Page</u>	RD_COMPANY_REL	Maintain company relationship information.
<u>Company - More Info Page</u>	RD_PROFILE	Maintain company profile data.
Company - Attributes	RB_ATTR_RUN_COMP	Maintain company attributes.

Company Search Page

Use the Company Search page (RD_COMPANY_GSRCH) to access an existing company.

Navigation

Customers CRM, Search Company

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

See "Understanding the Configurable Search" (PeopleSoft CRM 9.2: Automation and Configuration Tools).

Company - Summary: Summary Page

Use the Company - Summary: Summary page (RD_COMPANY_SUMMARY) to view summary information about the company.

Navigation

Customers CRM, Search Company, Company - Summary: Summary

Image: Company - Summary: Summary page (1 of 2)

This example illustrates the fields and controls on the Company - Summary: Summary page (1 of 2). You can find definitions for the fields and controls later on this page.

Company	
Save 360-Degree View Search Previous Next Add Company Add to My Contacts Add Task Personalize	
Customer MMA Property Management Group Contact Teri Thomas Phone 651/785-2546	Location Circle Pines, MN, USA Job Title Management Associate Email tthomas@mma.com
Company Account Team Tasks Call Reports Notes Contact Info Relationships More Info Attributes	
Summary Details Purchasing Info Tax Exempt Certificate	
Company Info	
Company Name MMA Property Management Group Address 1200 Lake Drive, Circle Pines, Anoka, CST, MN, 55014, USA Phone 800/988-5644 Fax Email MMA@mma.com Web URL	Primary Contact Name Teri Thomas Title Management Associate Address 1200 Lake Drive, Circle Pines, Anoka, PST, MN, 55014, USA Phone 651/785-2546 Fax Email tthomas@mma.com
Details	
Overview	
Customer Type User 1 Business Industry Appliances, Household Electric Country USA Location Type Division Year Started SetID CRM01	Taxpayer ID Equity Symbol MMAPM Legal Structure Employee Total Parent Company Year Incorporated Company ID 301
Corporate Hierarchy	
Details	

Image: Company - Summary: Summary page (2 of 2)

This example illustrates the fields and controls on the Company - Summary: Summary page (2 of 2). You can find definitions for the fields and controls later on this page.

Status	
Customer Status Active Customer Since 01/01/2000	Status Date 11/13/2001 Segment Code Retail
Financial Summary	
Fiscal Year End Currency Code Revenue Net Income Credit Rating	Equity Symbol MMAPM Exchange Market Cap Stock Price Quote Date
Details	
Audit History	
Created 04/02/2001 10:14PM PDT Modified 02/03/2014 4:40PM PST	By NAPA By VP1 Stu Marx

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

Company - Summary: Details Page

Use the Company - Summary: Details page (RD_COMPANY_DETAILS) to maintain general information about the company.

Navigation

Customers CRM, Search Company, Company - Summary: Details

Image: Company - Summary: Details page (1 of 2)

This example illustrates the fields and controls on the Company - Summary: Details page (1 of 2). You can find definitions for the fields and controls later on this page.

Company

Save

360-Degree View

Search

Add Company

Add to My Contacts

Add Task

>>

Personalize

Customer

MMA Property Management Group

Contact

Teri Thomas

Phone

651/785-2546

Location

Circle Pines, MN, USA

Job Title

Management Associate

Email

tthomas@mma.com

Company

Account Team

Tasks

Call Reports

Notes

Contact Info

Relationships

More Info

Attributes

Summary

Details

Purchasing Info

Tax Exempt Certificate

Company Details

*Company

MMA Property Management Group

Country

United States

Incorporated In

DUNS Number

Ownership

Legal Structure

Customer Type

User 1

Business

Website URL

Minority Owned

Corporate Hierarchy

More Names

Taxpayer ID

Location Type

Division

Employee Total

Parent Company

Year Started

Year Incorporated

*SetID

CRM01

*Company ID

301

Privacy

Do Not Contact

Do Not Email

Do Not Call

Do Not Mail

Image: Company - Summary: Details page (2 of 2)

This example illustrates the fields and controls on the Company - Summary: Details page (2 of 2). You can find definitions for the fields and controls later on this page.

Contact Info Entries

*Description

Phone

*Type	Country Code	Number	Ext/PIN
Business	<input type="text"/>	800/988-5644	<input type="text"/>
Pager	<input type="text"/>	800/987-4563	<input type="text"/>
FAX	<input type="text"/>	<input type="text"/>	<input type="text"/>
Pager	<input type="text"/>	<input type="text"/>	<input type="text"/>

Email

*Type	Email Address
Business	MMA@mma.com
Other	<input type="text"/>

Address

[Look up Address](#)

*Type

*Country

Address 1

Address 2

Address 3

City

County

State [Minnesota](#)

Postal

[Set Display](#)

Status and Currency Data

*Customer Status

Status Date

Customer Since

Segment Code

*Currency Code

*Currency Type

Credit Rating Value

Assessment

Financial Details

Industry Classifications

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

Company Name

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

See [Updating Name Information](#).

Customer Type

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

Business

Enter the customer's business type.

Location Type

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

Parent Company

Enter the name of the parent company. You must establish parent companies in the system before associating them with subsidiaries. When you save the component, the system

automatically creates a relationship between the two company business objects.



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

Corporate Hierarchy

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

Privacy

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

Contact Info

Enter contact information for the company.

See [Address Book Page](#).

Status and Currency Data

Customer Status

Select *Active* or *Inactive*.

Customer Since

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

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

Currency Code

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

Currency Type

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

Credit Rating Value

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

Segment Code

Select the company's business segment for marketing purposes.

Assessment

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

See [Customers and Business Contacts](#).

Purchasing Options

Indicate which purchasing tasks are valid for the company.

See [Understanding Purchasing Options](#).

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

Company - Account Team Page

Use the Company - Account Team page (RD_ACCOUNT_TEAM) to manage the account team that is assigned to the company.

Navigation

Customers CRM, Search Company, Company - Account Team

See "Company - Account Team Page" (PeopleSoft CRM 9.2: Sales)

Company - Tasks Page

Use the Company - Tasks page (RD_TASK_LIST) to manage sales team tasks for a company.

Navigation

Customers CRM, Search Company, Company - Tasks

Company - Call Reports Page

Use the Company - Call Reports page (RD_CALLRPT_LST_TXN) to view a list of call reports for which the company contacts are named as participants.

Navigation

Customers CRM, Search Company, Company - Call Reports

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

Company - Notes Page

Use the Company - Notes page (RD_COMPANY_NOTE_2) to maintain notes and attachments for the company.

Navigation

Customers CRM, Search Company, Company - Notes

Company - Contact Info Page

Use the Company - Contact Info page (RD_COMP_ADDR_BOOK) to manage company contacts, addresses, and sites.

Navigation

Customers CRM, Search Company, Company - Contact Info

See Maintaining Contact Information for Business Objects.

Company - Relationships Page

Use the Company - Relationships page (RD_COMPANY_REL) to maintain company relationship information.

Navigation

Customers CRM, Search Company, Company - Relationships

See [Understanding the Relationship Viewer](#).

Company - More Info Page

Use the Company - More Info page (RD_PROFILE) to maintain company profile data.

Navigation

Customers CRM, Search Company, Company - More Info

See [Understanding Profiles](#).

Company - Tax Exempt Certificate Page

Use the Company - Tax Exempt Certificate page (RD_TAX_EXEMPT_COMP) to maintain the company's tax exempt information.

Navigation

Customers CRM, Search Company, Company - Summary: Tax Exempt Certificate

Image: Company - Tax Exempt Certificate page

This example illustrates the fields and controls on the Company - Tax Exempt Certificate page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Company - Tax Exempt Certificate' page. At the top, there's a header with 'Company' and navigation links like 'Save', '360-Degree View', 'Search', 'Next', 'Add Company', 'Add to My Contacts', 'Add Task', and 'Personalize'. Below this, customer details are shown: Customer M.M.A., Contact Jim Jacobs, Phone 988-5600(650), Location Circlepines, MN, USA, Job Title, and Email jimjacobsd@yahoo.com. A series of tabs follows: Company, Account Team, Tasks, Call Reports, Notes, Contact Info, Relationships, More Info, and Attributes. Under the 'More Info' tab, there are sub-tabs: Summary, Details, Purchasing Info, and Tax Exempt Certificate. The 'Tax Exempt Certificate' sub-tab is selected, showing a form with fields for '*Exemption Certificate', 'Issuing Authority', and 'Authority Type' (set to 'Federal'). There's a 'Find | View All' button and a 'First 1 of 1 Last' indicator. An 'Add Certificate Data' button is at the bottom of the form. Below the form, a section titled 'Certificate Details' shows a message: 'No Tax Exempt Certificate has been added.'

Exemption Certificate and Issuing Authority

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

Authority Type	Enter the authority type for the associated tax exempt certificate. Values are <i>Europe</i> , <i>Federal</i> , <i>Local</i> , <i>Other</i> , <i>State</i> , and <i>Transport</i> .
Status as of Effective Date	Enter the status for the certificate. Values are <i>Active</i> and <i>Inactive</i> .
Tax Exempt Category	<p>Select the exemption category for which the customer qualifies with this purchase:</p> <ul style="list-style-type: none"> • <i>Blanket</i> Exemption category exists for all purchases of this type. • <i>Single Purchase</i> Exemption category exists for the specified purchase only. • <i>Other</i> A user-defined exemption category.
Exemption License	Select to denote that a tax-exempt license is issued to the customer.
Add Certificate Data	Select the Add Certificate Databutton to add tax additional certificates.

Defining Company Sites

This topic lists the pages used to define company sites.

Pages Used to Define Company Sites

Page Name	Definition Name	Usage
Company Search	RD_COMPANY_GSRCH	Search for existing companies.
Company - Sites	RD_COMPANY_SITE_2	View a list of company sites and add new sites for the company.

Related Links

[Defining Customer Sites](#)

Defining Company Contacts

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

Pages Used to Define Company Contacts

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Company - Contact Info: Contacts	RD_COMPANY_CNTCT_2	Maintain the list of contacts who represent the company in business transactions.
Create Contact of <company >	RBQ_QCREATE	Add a contact to a company.
Modify <contact>	RBQ_QCREATE	Maintain information for an existing company contact, including purchasing options and contact information.

Related Links

[Defining Customer Contacts](#)

Modeling Corporate Hierarchy

These topics provide an overview of corporate hierarchy and discuss how to:

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

Pages Used to Model Corporate Hierarchy

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Corporate Hierarchy Page	RB_HIER_GRP_BUILD	View and modify the participation percentage of objects in the corporate hierarchy. The Corporate Hierarchy link appears only if a hierarchy exists.
Corporate Hierarchy: Extract Hierarchy Page	RB_HIER_GRP_ROLES	Select roles for the hierarchy.

Understanding Corporate Hierarchy

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

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

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

Understanding Corporate Hierarchy Participation Percentages

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

Contact	Percent
Larry Hill	40
Stu Marx	20
Sandra Thomas	40

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

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

Corporate Hierarchy Page

Use the Corporate Hierarchy page (RB_HIER_GRP_BUILD) to view and modify the participation percentage of objects in the corporate hierarchy.

Navigation

- Customers CRM, Corporate Hierarchy
- Customers CRM, Search Company

Click the Corporate Hierarchy link on the Summary page.

Image: Corporate Hierarchy page

This example illustrates the fields and controls on the Corporate Hierarchy page. You can find definitions for the fields and controls later on this page.

Business Object ID 103
Business Object Name Sparkle Clean Laundromats

First | Previous | Next | Last | Left | Right

Company - Sparkle Clean Laundromats

- Site (0%) - Mountain View
- Site (0%) - Little Rock
- Site (0%) - Jacksonville
- Site (0%) - Benton
- Site (0%) - Arkansas City

Description
Role Type Company
Node Name Sparkle Clean Laundromats

Company Composition

Role	Name	Participation Percentage
Site	Mountain View	<input type="text"/>
Site	Little Rock	<input type="text"/>
Site	Jacksonville	<input type="text"/>
Site	Benton	<input type="text"/>
Site	Arkansas City	<input type="text"/>

[Extract Hierarchy](#)

Total Participation Percentage

Participation Percentage

Enter the percentage of activity that each business unit contributes.

Extract Hierarchy

Click to modify the roles that appear.

Corporate Hierarchy: Extract Hierarchy Page

Use the Corporate Hierarchy: Extract Hierarchy page (RB_HIER_GRP_ROLES) to select roles for the hierarchy.

Navigation

Click the Extract Hierarchy link on the Corporate Hierarchy page.

Image: Corporate Hierarchy: Extract Hierarchy page

This example illustrates the fields and controls on the Corporate Hierarchy: Extract Hierarchy page. You can find definitions for the fields and controls later on this page.

Corporate Hierarchy

***Role Category ID** Customer and Site ▼

☐ **Save as default Search Group**

Roles

	Description
<input checked="" type="checkbox"/>	Company
<input checked="" type="checkbox"/>	Site
<input checked="" type="checkbox"/>	Individual Consumer

Extract Hierarchy

Role Category ID

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

Save as default Search Group

Select to save the role selections as the default.

Roles

Select roles to appear in the hierarchy.

Extract Hierarchy

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

Defining Site Business Objects

Understanding Sites

Sites in CRM are:

- Customers that are represented by contacts.
- Always associated with a company or a consumer business object.
- Places where products are shipped or installed.
- Places where services are performed.

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

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

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

See the documentation, *PeopleSoft: Enterprise Components*.

Related Links

[Customers and Business Contacts](#)

[Defining Information for Business Contacts](#)

[Understanding Name and Address Information in CRM](#)

[Understanding Enterprise Integration Technology](#)

Setting Up Site Types

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

This topic discusses how to set up site types.

Page Used to Set Up Site Types

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Site Type	RD_SITE_TYPE	Define codes that you use to categorize sites. Site type IDs must be unique for the specified set ID.

Maintaining General Site Information

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

These topics discuss how to:

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

Pages Used to Maintain General Site Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Search Site	RD_SITE_GSRCH	Search for existing sites.
<u>Site - Site: Primary Page</u>	RD_SITE_MAIN_2	Maintain primary site information.
<u>Site - Site: Name Page</u>	RD_SITE_NAME_PG	Maintain site names. Designate a primary site name.
<u>Site - Site: Purchasing Info Page</u>	RD_SITE_CUST_OP_2	Maintain purchasing information for the site.
<u>Site - Site: Tax Exempt Certificate Page</u>	RD_TAX_EXEMPT_SITE	Maintain tax exempt information for the site.
Site - Account Team	RD_ACCOUNT_TEAM	View and modify the account team that is assigned to a site.

Page Name	Definition Name	Usage
Site - Contact Info Page	ABE_LIST	Maintain contact information for a site, including addresses, phone numbers, and email information.
Site - Contacts	RD_SITE_CNTCT_2	Maintain site contacts.
Site - Notes Page	RD_SITE_NOTE_2	Add notes and attachments for the specified site.
Site - Attributes	RB_ATTR_RUN_SITE	View attributes for the site.

Site - Site: Primary Page

Use the Site - Site: Primary page (RD_SITE_MAIN_2) to maintain primary site information.

Navigation

- Customers CRM, Add Site
- Customers CRM, Search Site, Site - Site: Primary

Image: Site -Site: Primary page

This example illustrates the fields and controls on the Site -Site: Primary page. You can find definitions for the fields and controls later on this page.

Site

Save | 360-Degree View | Search | Next | Add Site | Add to My Contacts | Personalize

Site Name Minneapolis

Site ID 478

SetID CRM01

Site | Account Team | Installed Product | Notes | Contact Info | Relationships | Attributes

Primary | Name | Purchasing Info | Tax Exempt Certificate

Profile Information

Customer MMA Property Management Group

Site Restrictions

Site Type Branch

*SetID CRM01

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 04/05/2001

Customer Since 04/05/2001

Segment Code RTL

*Currency USD

*Currency Type CRRNT

Credit Rating Value

Assessment Gold ★★★★★

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

Name

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

See [Understanding Name and Address Information in CRM](#).

Profile Information

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

Customer	Displays the primary name of the customer with whom the site is associated. Click the transfer button to access the customer's primary information.
Site Type	Select the site type. Site types are established on the Site Types page. See Understanding Sites .
Site Restrictions	Enter comments about any restrictions for the site.
Privacy	Select the appropriate privacy options for the site.

Purchasing Options

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

See [Defining Purchasing Options for Customers](#).

Status and Currency Data

Customer Status	Select <i>Active</i> or <i>Inactive</i> .
Customer Since	Enter the date that the site became a customer for your business. <hr/> Note: If you are integrated with PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management, you cannot modify the customer status information and the customer since date in CRM. <hr/>
Currency Code	Select the code that specifies the currency that you use for a monetary transaction with this site.
Currency Type	Select the exchange rate type that you use to calculate monetary transaction amounts in alternate currencies.
Segment Code	Select the site's business segment for marketing purposes.
Assessment	Displays the key performance indicator value as determined by PeopleSoft Enterprise Performance Management.

Contact Info

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

See [Maintaining Contact Information for Business Objects](#).

Site - Site: Name Page

Use the Site - Site: Name page (RD_SITE_NAME_PG) to maintain site names. Designate a primary site name.

Navigation

Customers CRM, Search Site, Site - Site: Name

See [Understanding Name and Address Information in CRM](#).

Site - Site: Purchasing Info Page

Use the Site - Site: Purchasing Info (purchasing information) page (RD_SITE_CUST_OP_2) to maintain purchasing information for the site.

Navigation

Access the Site - Site: Primary page. Click the Purchasing Info (purchasing information) link.

See [Defining Purchasing Options for Customers](#).

Site - Site: Tax Exempt Certificate Page

Use the Site - Site: Tax Exempt Certificate page (RD_TAX_EXEMPT_SITE) to maintain tax exempt information for the site.

Navigation

Access the Site - Site: Primary page and click the Tax Exempt Certificate link.

See [Understanding the Company Component](#).

Site - Contact Info Page

Use the Site - Contact Info page (ABE_LIST) to maintain contact information for a site, including addresses, phone numbers, and email information.

Navigation

- Customers CRM, Search Site, Contact Info
- Customers CRM, Add Site, Contact Info

See [Maintaining Contact Information for Business Objects](#).

Site - Notes Page

Use the Site - Notes page (RD_SITE_NOTE_2) to add notes and attachments for the specified site.

Navigation

Customers CRM, Add Site, Notes

Customers CRM, Search Site, Notes

Maintaining Site Contacts

This topic discusses how to maintain site contacts.

See [Defining Customer Contacts](#).

Pages Used to Define Site Contacts

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Site - Contacts	RD_SITE_CNTCT_2	Maintain site contacts.
Add Contact	RD_REP_ADD_SRCH	Add a contact of a site.
Maintain Contact	RBQ_QCREATE	Maintain purchasing options and contact information entries for a contact of a company, consumer, or site.

Defining Site Relationships

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

See [Understanding the Relationship Viewer](#).

Viewing Installed Products for a Site

This topic discusses how to view installed products for a site.

Pages Used to View Installed Products for a Site

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Site - Installed Product	RD_SITE_INSTPROD	View installed products for a site.

Defining Person Business Objects

Understanding Persons

These topics discuss:

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

Sources of Person Information

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

Related Links

[Understanding Enterprise Integration Technology](#)

Persons

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

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

Common Person Information

This information is available for all person roles:

- Name.

See [Understanding Name and Address Information in CRM](#).

- Contact information.

See [Contact Information on CRM Components](#).

- User-defined fields.

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

- Details information.

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

- User profiles.

User profiles include the person's user IDs, roles, and system permissions.

- Contact Info.

See [Maintaining Contact Information for Business Objects](#).

- Notes.

- More information.

See [Understanding Profiles](#).

Attributes

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

See [Configuring the Person Component](#).

Related Links

[Business Object Relationship Modelling](#)

Consumers and Contacts

Much of the information that appears in the Person component for consumers and contacts is similar. Both consumers and contacts perform the same activities: purchasing, leasing, or contracting for products or services. The difference is that consumers are customers and act on their own behalf, whereas contacts act on behalf of a customer or customer site.

In CRM, consumers are represented as person business objects with a business object type of Individual and a role type of Individual Consumer. Consumer records are maintained in the Person table. Because consumers participate in business transactions, a record for each consumer is also created in the Business Contact (BC) table, which enables you to define records for sold-to, bill-to, and ship-to information for the consumer.

Contacts are represented as business objects with a business object type of Individual and a role type of Contact. When a person is added to the system as a contact, a record for the person is inserted in the Person table. When the person is associated with a company, consumer, or site, a record is inserted in the Business Object Relationship (BO_REL) table to capture the relationship between the person and the company, consumer, or site. In addition to maintaining contact information for the Contact role, you can also maintain a separate set of contact information for a particular relationship for a contact (such as postal and email addresses and telephone and pager numbers) for each company, consumer, and site relationship. This information is used to contact the person when you are performing the contact role for a specific customer or site.

Contact and Consumer Information

This information is available for both consumers and contacts:

- National ID.

See [Defining National ID Types](#).

- Credit cards.
- Tasks.
- Call reports.
- Relationships.

See [Understanding the Relationship Viewer](#).

Consumer-Specific Information

This information is available for consumers only:

- Purchasing options.

See [Understanding Purchasing Options](#).

- Status and currency data.

See [Customers and Business Contacts](#).

- Tax exempt certificates.
- Account teams.

See "Managing Customer Accounts" (PeopleSoft CRM 9.2: Sales).

- Contacts.

You can associate contacts with a consumer. When you associate a contact with a consumer or one of the consumer's sites, a record is created in the Business Object Relationship table to capture the contact relationship between the contact and the consumer.

- Sites.

Sites are the geographic locations where services are performed or products are sent. Site records are maintained in the Site (RD_SITE) table. When you associate a site with a consumer, a record is

inserted in the Business Object Relationship table to capture the relationship between the site and the consumer.

- Employment history and verification.

Contact-Specific Information

The Customers page is available only for persons with the contact role only.

Workers

A worker is any person who performs work for your organization, including employees and contractors. Worker information is used by the Support, HelpDesk, and Field Service applications and includes job detail and information that is used to manage worker assignment on service orders.

Related Links

[Understanding Workers in CRM](#)

PeopleSoft Call Center Applications

Persons of Interest

A person of interest (POI) does not fit into either the contact, consumer, or worker categories, but is someone for whom your organization needs to maintain data and provide services. Some examples of POIs are pension payees, board members, pre-hires, and retirees.

POIs are defined using a subset of pages in the Person component (contact and consumer-specific pages are not used for POIs). The only required information for a POI is first and last names. Optionally, you can enter contact information, POI type, as well as user profiles for POIs. POIs might also have job information if they are synchronized to CRM from HCM. If a POI is made available in CRM through an integration with HCM and it contains a job record, this data is stored in CRM in read-only mode. If a POI is created online in CRM, a job record cannot be created. Job information is not used for processing transactions within CRM, but, if available, it appears on HRHD 360 Degree View.

POIs contact HR service centers with questions about their or their spouses' benefits, retirement plans, ESPPs and so on. In order for call center agents to capture reported issues quickly in cases when POIs call for the first time, CRM supports the creation of POIs through quick create at two primary entry points where cases get created: HRHD 360 Degree View search page and the employee search in HRHD cases.

Like other quick create enabled business objects, users with access to the Quick Create component can create POIs from there as well.

Configuring the Person Component

These topics discuss how to

- Select the Person default role.
- Define POI types.

To define a person of interest type, use the Person of Interest Type (POI_TYPE_TBL) component.

Pages Used to Configure the Person Component

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Configure Person Component Page</u>	RD_PERSON_CONFIG	Select the default role and the pages that appear in the Person component when a user adds a person or views a person.
<u>Person of Interest Type Page</u>	POI_TYPE_TBL	Define the valid POI types.

Configure Person Component Page

Use the Configure Person Component page (RD_PERSON_CONFIG) to select the default role and the pages that appear in the Person component when a user adds a person or views a person.

Navigation

Set Up CRM, Common Definitions, Customer, Configure Person Component

Image: Configure Person Component page

This example illustrates the fields and controls on the Configure Person Component page. You can find definitions for the fields and controls later on this page.

Configure Person Component

Default Actions

When User Clicks "Add Person" Button:

- ☒ Add new person with contact details
- ☐ Add new person with consumer details
- ☐ Add new person with worker details
- ☐ Add new person with person of interest details

View for Persons with Multiple Roles:

- ☒ View contact details if the person has Contact role
- ☐ View consumer details if the person has Consumer role
- ☐ View worker details if the person has Worker role
- ☐ View person of interest details if the person has POI role

Configuration and Visibility

Configuration

- ☐ Business to Business
- ☐ Business to Customer
- ☒ Mixed

No related rules have been found.

Page Object ID	Description	Visible
ACCOUNT_TEAM	Account Team Tab	Yes
ADDRESS_BOOK	Contact Info Tab	Yes
ADD_CONSUMER	"Add Consumer" Hyperlink in Primary Subtab	Yes
ADD_CONTACT	"Add Business Contact" Hyperlink in Primary Subtab	Yes
ADD_POI	"Add POI" Hyperlink in Primary Subtab	Yes
ADD_WORKER	"Add Worker" Hyperlink in Primary Subtab	Yes
ATTRIBUTES	Attributes Tab	No
BILL_PAYEES	Bill Payees Tab	Yes
CALL_REPORTS	Call Reports Tab	Yes
CUSTOMERS	Customers Tab	Yes
FIN_ACCOUNTS	Financial Accounts Tab	Yes
MORE_INFO	More Info Tab	Yes

Default Actions

Select the role that is added when a user selects Add Person from the menu and the role that appears when a user selects an existing person.

Configuration and Visibility

Business to Business, Business to Customer, and Mixed

Select an option to indicate whether the CRM installation supports business-to-business, business-to-consumer, or both. The option that you select determines the default page object settings.

Visible

Select *Yes* to have the selected page or link appear on the Person pages that appear to the user.

Person of Interest Type Page

Use the Person of Interest Type page (POI_TYPE_TBL) to define the valid POI types.

Navigation

Set Up CRM, Common Definitions, Customer, Person of Interest Type, Person of Interest Type

Image: Person of Interest Type page

This example illustrates the fields and controls on the Person of Interest Type page. You can find definitions for the fields and controls later on this page.

Person of Interest Type

Person of Interest Type: 00002 **Status as of Effective Date:** Active

Description: Pension Payee

Short Description: Pension

☒ **Job Record Required**

Source Indicator HCM

[Modify System Data](#)

This object is maintained by PeopleSoft.

Audit History

Modified 09/23/2004 4:07PM PDT PPLSOFT

Job Record Required

Select if job data is required when POI records of this type are brought into CRM by integration with another system. For records that originate in the CRM system, the system clears this check box.

Source Indicator

Select the source of POIs of this type. Value are: *CRM*, *External*, *HRMS*, and *SCM*.

Modify System Data

Click to modify the POI definition. The button label then changes to Stamp System Data. Click Stamp System Data to record changes and flag the definition as changed.

Defining Person Information

To define person information, use the Person (RD_PERSON) component.

These topics discuss how to:

- View and update primary person information.
- View and update person details.
- Maintain user information.
- Maintain credit card information.

- Maintain sales team tasks for a person.
- Access call reports for a person.
- Access notes and attachments for a person.
- Access billing accounts.
- Maintain contact information for a person.
- View and update person relationships.
- View and update person profile information.

Note: The search page that is used to access person records has two versions, depending on whether the user can view secured worker data. This setting is controlled by permission lists.

Pages Used to Define Person Information

Page Name	Definition Name	Usage
Person Search	RD_PRSN_SRCH	Search for an existing person. This search page appears only for users who can view a worker's secured information.
<u>Person (<Role>) - Person: Primary Page</u>	RD_PRSN_PRIMARY	View and update primary (most important and frequently accessed) person information and select the person role to access. As delivered, the <i>Business Contact</i> role appears by default.
Person (<Role>) - Edit Labels for User Defined Fields	RD_PRSN_UDF_L_EDIT	Modify the system-defined labels that appear for user-defined fields.
<u>Person (<Role>) - Person: Details Page</u>	RD_PRSN_DETAILS	View and update person details.
<u>Person (<Role>) - User Profiles Page</u>	RD_PERSON_USER	Maintain user information for a person who is permitted to access the online system.
<u>Person (<Role>) - Person: Credit Cards Page</u>	PD_PERSON_CC	Maintain the customer or contact credit card information.
<u>Person (<Role>) - Tasks page</u>	RD_TASK_LIST	Maintain sales team tasks for contacting a consumer or contact.
<u>Person (<Role>) - Call Reports Page</u>	RD_PRSN_CALL_RPTS	Access call reports for a person.
<u>Person (<Role>) - Contact Info Page</u>	RD_PRSN_ADDR_BOOKS	Maintain contact information for a person.
<u>Person (<Role>) - Relationships Page</u>	RD_PERSON_REL	View and update the person's relationships with other business objects.
<u>Person (<Role>) - More Info Page</u>	RD_PROFILE	View and update a person's marketing profile data.

Person (<Role>) - Person: Primary Page

Use the Person (<Role>) - Person: Primary page (RD_PRSN_PRIMARY) to view and update primary (most important and frequently accessed) person information and select the person role to access.

As delivered, the *Business Contact* role appears by default.

Navigation

- Select an existing person on the Person Search page.

Click the Primary link.

- Customers CRM, Add Person

Click the Primary link.

Note: The Person component is used to enter and maintain persons with the Business Contact, Consumer, or Person of Interest roles. The specific role with which you are working is noted with the (<Role>) label in the page title; for example, *Person (Business Contact)*.

Image: Person (<Role>) - Person: Primary page (1 of 3)

This example illustrates the fields and controls on the Person (<Role>) - Person: Primary page (1 of 3). You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Person (Business Contact)' primary page. At the top, there's a navigation bar with links like 'Save', '360-Degree View', 'Search', 'My Contacts', 'My Tasks', 'My Calendar', 'Add Contact', and 'Personalize'. Below this, the 'Name' is 'Stu Marx' and the 'Phone Number' is '555 5551260'. The 'Email Address' is 'smarx@peoplebank_psft.com'. A tabbed interface shows 'Person' as the active tab, with sub-tabs for 'Primary', 'Details', 'User Profiles', and 'Credit Cards'. The 'Person Information' section includes fields for 'Salutation', '*First Name' (Stu), '*Last Name' (Marx), 'Company', 'Middle Name' (Manager), 'Suffix', and 'Title' (Sales Manager). The 'Contact Info Entries' section has a table for phone numbers with columns for *Type, Country Code, Number, and Ext/PIN. It also includes an 'Email' section with *Type and Email Address fields. The 'Address' section features a 'Look up Address' button and fields for *Type, *Country, Address 1, Address 2, Address 3, City, County, State (NY), and Postal (10045).

Image: Person (<Role>) - Person: Primary page (2 of 3)

This example illustrates the fields and controls on the Person (<Role>) - Person: Primary page (2 of 3). You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Person (<Role>) - Person: Primary page (2 of 3)'. It features a 'Contact Info Entries' section with a table for phone numbers and an email section. The phone table has columns for *Type, Country Code, Number, and Ext/PIN. The email section has columns for *Type and Email Address. To the right, there is an 'Address' section with a 'Look up Address' button and fields for *Type, *Country, Address 1, Address 2, Address 3, City, County, State (with a dropdown for CA and a link to California), and Postal. A 'Set Display' button is at the bottom right of the address section.

Image: Person (<Role>) - Person: Primary page (3 of 3)

This example illustrates the fields and controls on the Person (<Role>) - Person: Primary page (3 of 3). You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Person (<Role>) - Person: Primary page (3 of 3)'. It features a 'User Defined Fields' section with a table of 10 fields (Field 1 to Field 10). Below the table is a link 'Edit User Defined Field Labels'. At the bottom of the page, there are three links: 'Add Consumer Information', 'Edit Worker Information', and 'Add Person of Interest Information'.

When you first access this page in add mode, the page is titled Person (Business Contact). When you access information for an existing person who either has the Contact role only or both the Contact and Consumer roles, the page is titled Person (Business Contact). The page is titled Person (Consumer) if you are viewing information for a person who has only the Consumer role.

You can configure which role appears by default when you add a person or search for a person who has both the Contact and Consumer roles.

See [Configuring the Person Component](#).

The links at the bottom of the page enable you to view information for another person role. Different links appear depending on which role is currently shown. For example, when the Consumer pages appear, the link is Add Contact Information or Edit Contact Information. The links show the words *Add* or *Edit* depending on whether the role information already exists for the person.

Add Consumer Information and Edit Consumer Information Click to add the Consumer role to the person or, if the Consumer role already exists for the person, to edit consumer information. The common information appears, but consumer-specific pages appear instead of contact-specific pages.

Add Contact Information and Edit Contact Information

Note: This link appears if the Contact pages for a person currently appear.

Click to add the Contact role to the person or, if the Contact role already exists for the person, to edit contact information.

Note: This link appears only if the Consumer pages for a person currently appear.

Add Worker Information and Edit Worker Information

Click to add or edit worker information for the person. The common information appears, but worker-specific pages appear instead of contact-specific pages.

Note: The Worker component is the primary place where worker information is viewed and updated.

See [Understanding Workers in CRM](#).

Add Person of Interest Information and Edit Person of Interest Information

Click to add or edit person of interest information for the person.

Person Information

Enter basic name information. The name information appears differently depending on the country that is specified for the user. For example, in Japan, the last name appears in order before the first name.

See [Updating Name Information](#).

For double-byte operating systems, you can enter the name and address information in alternate character format.

Contact Info Entries

Enter address, phone, and email information. Two Contact Info Entries regions appear on this page: one for home information and one for business information.

See [Maintaining Contact Information for Business Objects](#).

Alternate Character

For double-byte operating systems, you can enter the name and address information in alternate character format.

User-Defined Fields

You can define up to 10 fields in which to enter and store information that is useful to you. This information is stored on a separate table in the database and is available for users that you create.

Edit User Defined Field Labels

Click to enter labels for user-defined fields. For example, you might change the label Field 1 to Name of Pet.

Person (<Role>) - Person: Details Page

Use the Person (<Role>) - Person: Details page (RD_PRSN_DETAILS) to view and update person details.

Navigation

Click the Details link on the Person page.

Image: Person (<Role>) - Person: Details page

This example illustrates the fields and controls on the Person (<Role>) - Person: Details page. You can find definitions for the fields and controls later on this page.

The example that is shown is for the Business Contact role. If you are viewing information for a person with the Consumer role, the Purchasing Options and Status and Currency Data page regions appear.

Profile Information

Privacy

Select an option to indicate restrictions on ways of contacting the person.

Purchasing Options

This page region appears only for a person with the Consumer role.

See [Understanding Persons](#).

Person (<Role>) - User Profiles Page

Use the Person (<Role>) - Person: User Profiles page (RD_PERSON_USER) to maintain user information for a person who is permitted to access the online system.

Navigation

Click the User Profiles link on the Person page.

Image: Person (<Role>) - Person: User Profiles: User Summary page

This example illustrates the fields and controls on the Person (<Role>) - Person: User Profiles: User Summary page.

Person (Business Contact)

Save | 360-Degree View | Search | My Contacts | My Tasks | My Calendar | Add Contact | >> | Personalize

Name: Stu Marx | Phone Number: 555 5551260
Email Address: smarx@peoplebank_psft.com

Person | Tasks | Call Reports | Customers | Notes | Contact Info | Relationships | More Info

Primary | Details | **User Profiles** | Credit Cards

User Summary | Personalize | Find | 1-7 of 7 | First | Last

User ID
AK
IMPORT
JPN
PSCR
PSTG
SMARX
VP1

Add New User

In the User Summary region, the user IDs that are already associated with the person appear. If no users are associated, then no user information appears.

User ID

Click a user ID to access the detailed user profile information.

Add New User

Click to add a new user. When you click this button, more fields appear on the page for you to enter information about the user.

User Information Detail Page

Navigation

Click the User Profiles link on the Person page.

Image: Person (<Role>) - Person: User Profiles: User Information Detail page

This example illustrates the fields and controls on the Person (<Role>) - Person: User Profiles: User Information Detail page. You can find definitions for the fields and controls later on this page.

Person (Business Contact)

Save | 360-Degree View | Search | My Contacts | My Tasks | My Calendar | Add Contact | >> Personalize

Name Stu Marx Phone Number 555 5551260
Email Address smarx@peoplebank_psft.com

Person Tasks Call Reports Customers Notes Contact Info Relationships More Info

Primary Details **User Profiles** Credit Cards

User Information Detail

Logon Information

*User ID IMPORT
*Password
*Confirm Password

Permission Lists

Process Profile ALLPAGES
Primary ALLPAGES
☐ Locked Out?

Contact Roles

Role Name	Description		
EOPP_USER	Common Portal User	+	-
	Employee	+	-
PAPP_USER	Enterprise Portal User	+	-
	Env. Mgmt. Packaging	+	-
	PeopleSoft Admin Privileges	+	-
PeopleSoft User	PeopleSoft User	+	-
	ALLPAGES	+	-
	Can start application server	+	-

User Information Detail

Enter user ID, password, and permission list information for the user.

Contact Roles

You can grant security roles to the person who is associated with the user ID. The Role Name field lists only roles that you have permission to grant based on your user ID.

Person (<Role>) - Person: Credit Cards Page

Use the Person (<Role>) - Credit Cards page (PD_PERSON_CC) to maintain the customer or contact credit card information.

Navigation

Click the Credit Card link on the Person page.

Image: Person (<Role>) - Person: Credit Cards page

This example illustrates the fields and controls on the Person (<Role>) - Person: Credit Cards page. You can find definitions for the fields and controls later on this page.

The Credit Card Summary section lists all the saved credit card entries created for the person, which can be used to pay for charges pertaining to cases, service orders, agreements, and orders.

Primary

Indicates the selected credit card to be the default entry that is used to pay for charges to which the person is liable.

Credit Card Number

Click the link to access the detailed information of the selected credit card.

See "Credit Card Information Page" (PeopleSoft CRM 9.2: Call Center Applications).

Expiration Date

Displays the expiration date of the corresponding credit card.

Status

Select a status for the credit card. The system populates only *active* credit card entries in supported transactions as payment options.

Add Credit Card

Click to add new credit card entries.

Person (<Role>) - Tasks page

Use the Person (<Role>) - Tasks page (RD_TASK_LIST) to maintain sales team tasks for contacting a consumer or contact.

Navigation

Select the Tasks tab on any page in the Person component.

Person (<Role>) - Call Reports Page

Use the Person (<Role>) - Call Reports page (RD_PRSN_CALL_RPTS) to access call reports for a person.

Navigation

Select the Call Reports tab on any page in the Person component.

Person (<Role>) - Notes Page

Access the Person (<Role>) - Notes page.

Person (<Role>) - Contact Info Page

Use the Person (<Role>) - Contact Info page (RD_PRSN_ADDR_BOOKS) to maintain contact information for a person.

Navigation

Select the Contact Info tab on any page in the Person component.

See [Maintaining Contact Information for Business Objects](#).

Person (<Role>) - Relationships Page

Use the Person (<Role>) - Relationships page (RD_PERSON_REL) to view and update the person's relationships with other business objects.

Navigation

Select the Relationships tab on any page in the Person component.

Person (<Role>) - More Info Page

Use the Person (<Role>) - More Info (person - more information) page (RD_PROFILE) to view and update a person's marketing profile data.

Navigation

Select the More Info tab on any page in the Person component.

See [Understanding Profiles](#).

Defining Information for Business Contacts

This topic lists the pages that are used to define information for business contacts.

Pages Used to Define Information for Business Contacts

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Person (Business Contact) - Customers	RD_PERSON_COMP	Maintain the customers that are associated with a business contact.
Person (Business Contact) - Add Customer / Site / Purchasing Options	RD_PERSON_ADD_COMP	Add customers for a contact.
Search For Customer	RBQ_BOSRCH	Search for a customer to add for the contact.

Defining Consumer Information

These topics discuss how to:

- Maintain tax exempt information for a consumer.
- Maintain purchasing options for a person.
- Define account teams.
- Define account plans.
- Maintain consumer contact information.

Pages Used to Define Consumer Information

Page Name	Definition Name	Usage
<u>Person (Consumer) - Person: Purchasing Page</u>	RD_CONSUMER_BC_OPT	Maintain purchasing options for a person.
Person (Consumer) - Person: Employments	RD_PERSON_EMPLOY	Add a person's employment history.
<u>Person (Consumer) - Person: Tax Exempt Certificate Page</u>	RD_TAX_EXEMPT_CONS	Maintain a person's tax exemption information.
<u>Person (Consumer) - Account Team Page</u>	RD_ACCOUNT_TEAM	Define the account team that is assigned to the consumer.
Person (Consumer) - Contact Info: Contacts	RD_CONSUMER_REP	Maintain the list of contacts for a consumer.
Create Contact of <consumer>	RBQ_QCREATE	Add a contact to a consumer.
Modify <contact>	RBQ_QCREATE	Maintain information for an existing company contact, including purchasing options and contact information.
Person (Consumer) - Sites	RD_CONSUMER_SITE_2	Maintain the list of sites for a consumer.
Create Site of <consumer >	RBQ_QCREATE	Add a site to a consumer.
Modify <site>	RBQ_QCREATE	Maintain information for an existing company site.

Person (Consumer) - Person: Tax Exempt Certificate Page

Use the Person (Consumer) - Person: Tax Exempt Certificate page (RD_TAX_EXEMPT_CONS) to maintain a person's tax exemption information.

Navigation

Click the Tax Exempt Certificate link on the Person page for a person with the Consumer role.

See [Understanding the Company Component](#).

Person (Consumer) - Person: Purchasing Page

Use the Person (Consumer) - Person: Purchasing page (RD_CONSUMER_BC_OPT) to maintain purchasing options for a person.

Navigation

- Add Person

Click the Purchasing link.

- Select an existing person on the Person Search page.

If the Purchasing link does not appear, click the Add Consumer Information link or Edit Consumer Information link, whichever appears.

Click the Purchasing link.

See [Understanding Purchasing Options](#).

Person (Consumer) - Account Team Page

Use the Person (Consumer) - Account Team page (RD_ACCOUNT_TEAM) to define the account team that is assigned to the consumer.

Navigation

Select the Account Team tab on any page in the Person component for a person with the Consumer role.

Image: Person (Consumer) - Account Team page

This example illustrates the fields and controls on the Person (Consumer) - Account Team page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Person (Consumer)' page in PeopleSoft CRM 9.2: Sales. The header includes a 'Save' button and several navigation links: '360-Degree View', 'Search', 'My Contacts', 'My Tasks', 'My Calendar', 'Add Contact', and 'Personalize'. Below the header, the main content area is divided into tabs: 'Person', 'Account Team', 'Tasks', 'Call Reports', 'Notes', 'Contact Info', 'Relationships', and 'More Info'. The 'Account Team' tab is currently selected. Under this tab, there is a 'Team Summary' section which states 'No teams have been assigned.' and includes an 'Add Team Members' button.

You can add team members to the account team individually or automatically by using sales territory trees and assignment groups.

See "Company - Account Team Page" (PeopleSoft CRM 9.2: Sales).

Person (Consumer) - Contact Info Page

Use the Person (Consumer) - Contact Info: Contacts page (RD_CONSUMER_REP) to maintain the list of contacts for a consumer.

Navigation

Customers CRM, Search Person, Person (Individual Consumer), Contact Info

Click the Contacts link.

The Contact Info page enables you to maintain addresses, contacts, and sites for the consumer.

See [Defining Customer Contacts](#), [Defining Customer Sites](#).

Defining Person of Interest Information

To define POI information, use the Person (RD_PERSON) component by clicking the Add Person of Interest Information or Add Person (Person of Interest) link that appears at the bottom of the Person (<Role>) - Person: Primary page. The information that you can enter for persons of interest is basic person data, as described previously in these topics. If the POI originated in an HR system, the person might have job records associated with them.

Related Links

[Persons of Interest](#)

Chapter 12

Defining Workers

Understanding Workers in CRM

These topics discuss:

- Workforce administration.
- Options for creating workers.
- Job information and effective dates.

Workforce Administration

Worker refers to anyone who performs work for an organization, including employees and contractors. Employees who are not part of the CRM workforce are considered CRM customers in the sense that they might call the help desk or HR help desk for assistance with problems. These topics focus on maintaining the information that is necessary to administer workers who are part of the CRM workforce and to assign them to field service and support tasks.

In CRM, workers are represented as Person business objects with a role type of Worker. The Person table (RD_PERSON) contains a record for each worker, with Person ID as the key field. Attributes that are specific to the person's role as a worker, such as employee status, job location, work function, and so forth, are stored in the Worker table (RB_WORKER).

Workers are not tracked as business contacts, although you can assign the Contact role to a worker.

See [Person \(<Role>\) - Person: Primary Page](#).

Worker User Preferences and Security

Workers often have access to the CRM system to perform their functions. You can control worker access to data for system functions.

Worker Foundational Data

Worker foundational data is the control information (or prompt tables) from which you select when creating a worker. This data describes the organization infrastructure in which workers perform. You can maintain these tables in CRM, PeopleSoft Human Capital Management (PeopleSoft HCM), or a third-party system and move the data to CRM by implementing enterprise integration points (EIPs).

This is the worker foundational data that you must set up before creating workers:

- Job codes.
Use the Job Code Table EIP to integrate with an HR system.
- Department tables.

Use the Department Table EIP to integrate with an HR system.

- Locations.
- Competency information.

Worker competency information determines which workers are best qualified for assignment to a case or service order. Use the Competency Type, Rating Model, and Competency EIPs to integrate with an HR system.

See [Understanding Enterprise Integration Technology](#).

Navigation

CRM provides two ways to access pages that you might use when setting up worker data: the left-hand menu and the Worker Administration Center. This topic lists the left-hand menu navigation.

Options for Creating Workers

After you set up the foundational data, you create workers in several ways:

- Use the Person or Worker component to create and maintain worker records in CRM.

When you create a worker in the Worker component, you can create a new worker, copy data from an existing worker, or copy data from a template worker.

- Integrate worker data with PeopleSoft HCM or a third-party HR system.

You implement the Personal Data, Workforce Data, and Person Competencies EIPs to populate the Person, Worker, and Worker Competency tables in the CRM system .

If you integrate with an HR system that maintains worker data, do not modify the personal data, job detail, and competencies that are entered in the human resource system. You should use the Worker pages in CRM to maintain only user profiles, notes, and worker data that is used by the CRM assignment engine.

- Use quick create functionality.

The Quick Create component requires that you enter the minimum required information and is used to quickly enter data. Quick create of workers is also supported through HRHD 360-Degree View and Worker 360-Degree View.

Copying Existing and Template Workers

Creating a worker by copying an existing worker and creating a worker by copying a template worker are similar processes. The difference is in the way in which you identify the information to copy. When you copy an existing worker, you must search through the entire Worker table to identify the worker to copy; but when you copy a template worker, you can select the worker to copy from a drop-down list box that contains only workers who are designated as template workers.

Template workers are workers whose information represents a model to use when you create other workers. You can set up dummy workers, such as CSR Level 1, as template workers. You can also identify employees who are good template workers. For example, employee John Smith is a good template worker for CSR Level 1. You designate a worker as a template worker when you enter the job

detail for the worker. Whether you designate real employees or set up dummy workers for templates is an implementation consideration.

When you create a worker by copying an existing worker or a template worker, all active worker roles are copied to the new worker. Current active job details for all assignments are copied, but not historical or future job details.

Worker Toolbar

The worker toolbar contains a Create from Current button that you can use to create a new worker from a worker whose data you are currently viewing and a Copy Data button that you can use to copy the worker's data to another worker.

Related Links

[Understanding Enterprise Integration Technology](#)

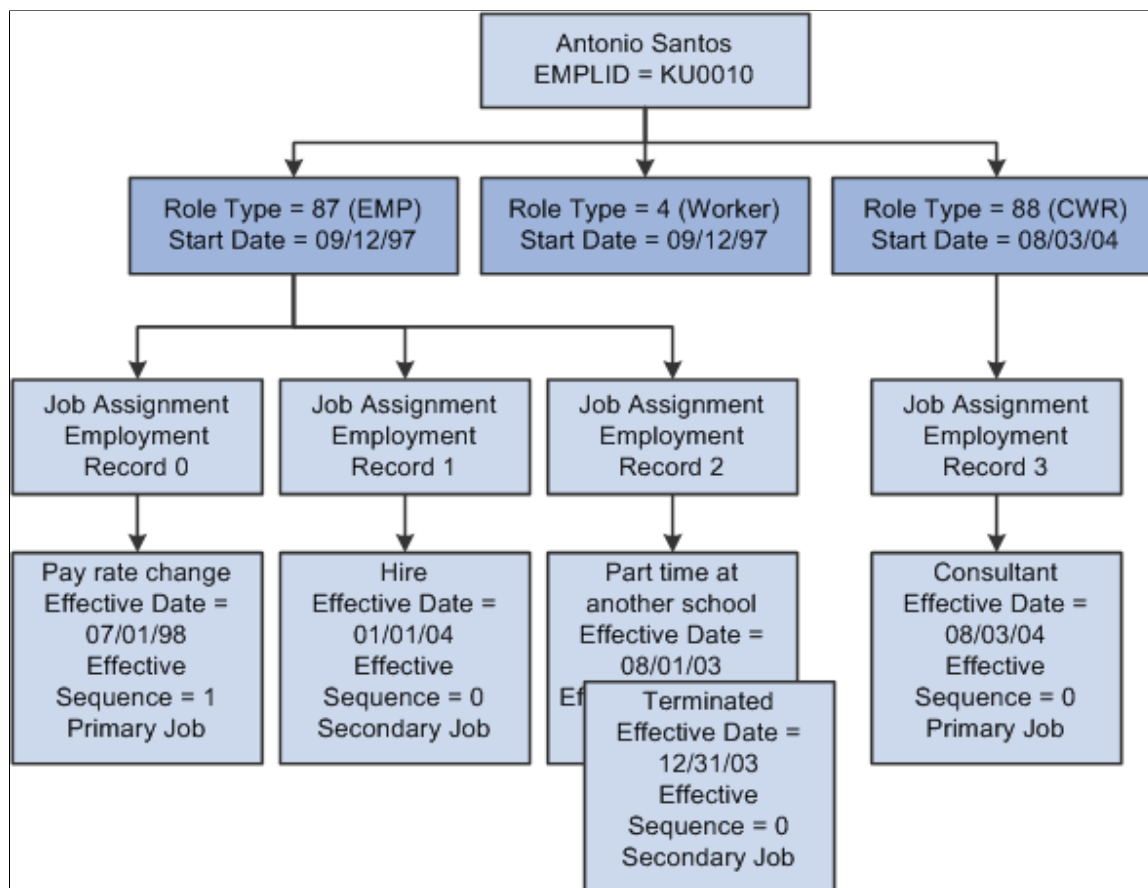
Job Information and Effective Dates

A worker's job assignments and their relation to the organization can change over time. For example, a worker can be promoted, perform a different job, or change from employee to contingent worker status. Changes in a worker's job and organizational relationships are represented in the database by effective-dated assignment and job detail rows.

The current row is the most recent row for which the effective date is before the current date. Future-dated rows are all rows for which the effective date is after the current date, and historical rows are all rows for which the effective date is before the effective date of the current row.

Image: Effective-dated job information

This diagram illustrates the use of effective dates in managing a worker's assignments, roles, and job information:



In this example, Antonio Santos was hired on September 1997. Antonio is assigned the Worker and Employee roles as of his hire date, and the effective date of both roles is set to the date of hire. Initially, the end date for both roles is set to 12/31/2999.

Assignments and Roles

All workers have the *Worker* role by default, and must also have either the *Employee* or *Contingent Worker* role on each assignment. The *Worker* role is terminated only when all assignments for the worker are terminated.

Each worker can have multiple assignments, and an assignment can have multiple effective-dated job detail records for it. You can add a new job assignment without changing existing job records. The first job record that you add for new job assignments always has the *Hire* action code, and you must specify the worker's role for each assignment. An assignment is terminated when all active job records that relate to it are terminated.

Jobs

There are two levels of primary jobs. One at the job level is user-selected and could be called the *primary job*. Another primary job is system-defined and could be called the *primary job assignment*. The primary job assignment is determined by an algorithm and takes into consideration the primary job. A worker can have only one primary job assignment.

By default, the first job record added for a role is marked as the *Primary* job record for that role. The primary job assignment is used by the Assignment Engine when assigning workers to cases or service orders.

If a worker requires new job data for an existing assignment, for example, a new supervisor ID, job code, or location, you create a new effective-dated job record for that assignment. When Antonio receives a pay increase, a new job record is inserted, effective July 1, 1998 to reflect the change. The new current record becomes the primary record. A background job runs to mark the primary flag on future job records.

Inactivating Provider Group Memberships for Worker Terminated in HCM

If a worker is scheduled to be terminated in an integrated HCM system on a future date, the same status change in the corresponding CRM worker record is handled in the background through the `WORKFORCE_SYNC` EIP and reflected on the record properly when the termination date arrives. In a situation where the worker is a member of a provider group, such relationship needs to be inactivated as well.

CRM delivers an application engine (AE) program to dissociate terminated workers from their provider groups. This program, named `PGRP_JOB`, is scheduled to run nightly to identify terminated workers and inactivate any of their existing provider group memberships. When the update is completed, the status of a terminated worker is set to *Inactive* on the Provider Groups page of the related provider group. Similarly, the status of the provider group is set to *Inactive* on the Groups page of the terminated worker's record.

Creating Workers

To create workers, use the Add Worker (`RD_CREATE_WORKER`) and Copy Worker (`RD_COPY_WRKR_DATA`) components.

These topics list prerequisites and discuss how to:

- Select the method for creating a worker.
- Select information to copy to a new worker.
- Create workers using the Quick Create function.

Pages Used to Create Workers

Page Name	Definition Name	Usage
Add Worker: Select Creation Method Page	<code>RD_CREATE_WORKER</code>	Select the method for creating a new Worker business object.
Add Worker: Select Data to Copy Page	<code>RD_COPY_OPTIONS</code>	Select information to copy to a new worker from either a template or an existing worker.
Add Worker	<code>RD_COPYWRKR_CONFRM</code>	Verify that the worker information is correct.

Page Name	Definition Name	Usage
Create Worker Page	RBQ_QCREATE	Add a worker with the minimum necessary information.

Prerequisites

Before you create workers, you must set up the tables that contain information that is referred to by all workers. For example, each worker belongs to a department and has a job code. The information in these tables is called foundational data.

See [Setting Up Foundational Data for Workers](#).

Add Worker: Select Creation Method Page

Use the Add Worker page (RD_CREATE_WORKER) to select the method for creating a new Worker business object.

Navigation

Workforce, Add Worker, Add Worker

Image: Add Worker page

This example illustrates the fields and controls on the Add Worker page. You can find definitions for the fields and controls later on this page.

Add Worker

Select Creation Method

☒ **Template Worker**

☐ **Existing Worker**

☐ **New Worker**

Information for New Worker

***First Name**

***Last Name**

Employee ID

Select Creation Method

Template Worker

Select to create the new worker from a template worker.

Select the template worker from the drop-down list box.

Existing Worker

Select to create the new worker from an existing worker.

Search for and select the worker to copy.

New Worker

Select to access the Worker component and enter information for the new worker.

Information for New Worker

Enter the first and last names for the new worker, and optionally enter the employee ID.

Add Worker: Select Data to Copy Page

Use the Add Worker page (RD_COPY_OPTIONS) to select information to copy to a new worker from either a template or an existing worker.

Use the Add Worker page (RD_COPYWRKR_CONFRM) to verify that the worker information is correct.

Navigation

Access the Add Worker page.

- Select the Template Worker option and select a template worker from the available choices.

Enter the first and last names.

Click the Continue button.

- Select the Existing Worker option and select an existing worker.

Enter the first and last names.

Click the Continue button.

- Click the Create Worker button on the second Add Worker page.

Image: Add Worker page

This example illustrates the fields and controls on the Add Worker page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Add Worker' page with the following sections:

- Worker Selection**
 - Copy From: Spencer Underwood
 - New Worker: Mary Kumar
- Select Data to Copy**

Select the data you wish to copy. Any existing data for target worker will be erased.

<input checked="" type="checkbox"/> Work Schedule	<input checked="" type="checkbox"/> Skills and Competencies
<input checked="" type="checkbox"/> Provider Group Membership	<input checked="" type="checkbox"/> Assignment Criteria
<input checked="" type="checkbox"/> Job Detail (HCM Information)	

The following Copy Options require User ID and Password:

<input checked="" type="checkbox"/> CRM User Preferences	<input checked="" type="checkbox"/> Group Worklist Membership
<input type="checkbox"/> MCF Email and Chat Settings	<input checked="" type="checkbox"/> User Profile Information

User ID:

Password:

Confirm Password:

Select Data to Copy

Select the data to copy from the template worker or existing worker to the new worker. The job detail data is selected and copied by default—you cannot deselect this check box.

If you select User Profile Information, CRM User Preferences, MCF Email and Chat Settings (multichannel framework email and chat settings), or Group Worklist Membership, you must enter a user ID and password for the new worker.

Related Links

Automation and Configuration Tools

Create Worker Page

Use the Create Worker page (RBQ_QCREATE) to add a worker with the minimum necessary information.

Navigation

Customers CRM, Quick Create

Search for a description of *The Worker*.

Image: Create Worker page (1 of 2)

This example illustrates the fields and controls on the Create Worker page (1 of 2). You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Create Worker' page, which is divided into two main sections: 'Worker' and 'Job Assignment'.

Worker Section:

- Search Existing Person:** A link with a magnifying glass icon.
- Format for:** A dropdown menu currently set to 'United States'.
- Prefix:** A text input field.
- *First Name:** A required text input field.
- *Last Name:** A required text input field.
- Middle Name:** A text input field.
- Suffix:** A text input field.

Job Assignment Section:

- Effective Date:** A date input field showing '07/23/2009' with a calendar icon.
- Worker Role:** A dropdown menu currently set to 'Employee'.
- *Job Code SetID:** A required text input field with a magnifying glass icon.
- *Job Code:** A required text input field with a magnifying glass icon.
- *Department SetID:** A required text input field with a magnifying glass icon.
- *Department:** A required text input field with a magnifying glass icon.
- *Location SetID:** A required text input field with a magnifying glass icon.
- *Location Code:** A required text input field with a magnifying glass icon.

Image: Create Worker page (2 of 2)

This example illustrates the fields and controls on the Create Worker page (2 of 2). You can find definitions for the fields and controls later on this page.

You can use this page in two modes:

- To enter information for a new worker.

You can create only one effective-dated job row. This page does not enable you to set up security information, that is, user IDs, roles, and passwords.

- To retrieve and modify existing worker information.

Note: In addition to the Quick Create component, you can access this page from the HRHD 360-Degree View and Worker 360-Degree View when you select to create workers from their search pages.

Search Existing Person

Click to retrieve the information for an existing person. You can modify the information and click the Apply button to update the database.

Note: Job assignment information does not appear for an existing worker.

Maintaining Worker Information

To maintain worker information, use the Worker (RD_WORKER_2) component.

These topics discuss how to:

- View and maintain summary worker information.

- View and maintain worker details.
- View and maintain user profiles.
- Enter job details.
- View assignment summary information.
- Define default schedules.
- Associate competencies with workers.
- Define job assignment criteria.
- Associate workers with provider groups and worklists.
- Define default storage locations.
- Define default signatures.

Pages Used to Maintain Worker Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Worker	RD_WORK_GSRCH	Search the database for existing workers.
Person	RD_PERSON_SEARCH	Search the database for existing persons. To access the Worker component for a person, click the Add Worker Information or Edit Worker Information link on the Person - Summary page.
<u>Worker - Worker: Primary Page</u>	RD_PRSN_PRIMARY	View and update summary information for a worker.
<u>Worker - Worker: Details Page</u>	RD_PRSN_DETAILS	View and maintain worker profile information.
<u>Worker - Worker: User Profiles Page</u>	RD_PERSON_USER	Maintain the worker's user profile.
<u>Worker - Job: Job Details Page</u>	RD_WORKER_DETAIL	Enter information about the specified worker's job.
<u>Worker - Job: Job Summary Page</u>	RD_ASGN_JOB	View assignment summary information for the worker.
<u>Worker - Work Schedule Page</u>	RD_WORKER_SCHEDULE	Define default workdays for the specified worker.
<u>Worker - Skills and Competencies Page</u>	RD_WORKER_CMP_PROF	Associate the specified worker with a competency and define the worker's level of proficiency for the competency.
<u>Worker - Assignment Criteria Page</u>	RD_WORKER_CRITERIA	Define criteria that the assignment engine uses to match the specified worker to a case or service order.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Worker - Groups Page</u>	RD_WORKER_GROUPS	Associate the worker with provider groups and group worklists.
<u>Worker - Storage Locations Page</u>	RD_WORK_STORLOC	Define inventory storage locations that are associated with good and defective storage locations on a field service worker's truck.
<u>Worker - Signature Page</u>	RD_WORKER_WF_SIG	Define a default signature to use when the specified worker sends manual notifications.
Worker - Notes	RD_PERSON_NOTES	Add notes and attachments for the specified worker.
Worker - Address Book	RD_PRSN_ADDR_BOOKS	View and update a worker's contact information.
Worker - More Info	RD_PROFILE	View and update a worker's marketing profile data.

Worker - Worker: Primary Page

Use the Worker - Worker: Primary page (RD_PRSN_PRIMARY) to view and update summary information for a worker.

Navigation

- Workforce, Search Worker, Primary
- Workforce, Add Worker

Enter required information on the Add Worker pages and click the Create Worker button.

Image: Worker - Worker: Primary page

This example illustrates the fields and controls on the Worker - Worker: Primary page. You can find definitions for the fields and controls later on this page.

Worker

Save | Create from Current | Copy Data | 360-Degree View | >> Personalize

Name Mary Kumar Employee ID KU100

Worker Job Work Schedule Skills and Competencies Assignment Criteria Groups

Primary Details User Profiles

Person Information

Salutation

*First Name Mary Middle Name

*Last Name Kumar Suffix

Employee ID KU100 Title Support Agent

Date of Birth 31 Age Gender

[More Names](#)

The Worker - Worker: Primary page and the Person - Primary page are identical in appearance and usage, except:

- The Worker - Worker: Primary page contains the employee ID and title.
- The Person - Primary page contains a setID.

Contact information entries and user-defined fields on the Worker - Worker: Primary page act the same as those on the Person - Primary page.

See [Person \(<Role>\) - Person: Primary Page](#).

Worker - Worker: Details Page

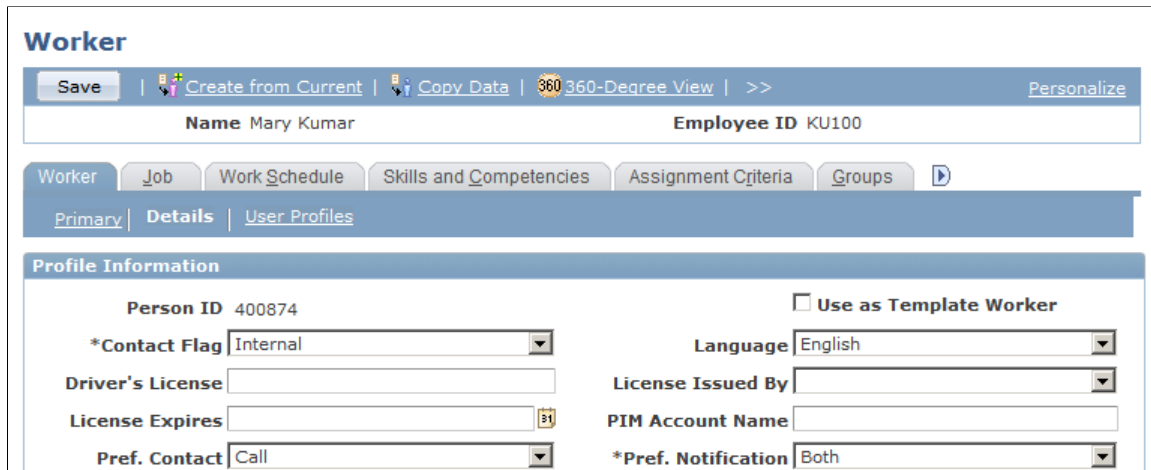
Use the Worker - Worker: Details page (RD_PRSN_DETAILS) to view and maintain worker profile information.

Navigation

Click the Details link on the Worker - Primary page.

Image: Worker - Worker: Details page

This example illustrates the fields and controls on the Worker - Worker: Details page. You can find definitions for the fields and controls later on this page.



Worker

Save | Create from Current | Copy Data | 360-Degree View | >> Personalize

Name Mary Kumar Employee ID KU100

Worker Job Work Schedule Skills and Competencies Assignment Criteria Groups

Primary Details User Profiles

Profile Information

Person ID 400874 ☐ Use as Template Worker

*Contact Flag Internal Language English

Driver's License License Issued By

License Expires PIM Account Name

Pref. Contact Call *Pref. Notification Both

This page is similar in appearance and use to the Person - Details page, except:

- Only the Profile Information region appears on the worker page.
- On the worker page, the Use as Template Worker field enables you to make this worker's information available as a template for creating a worker.

See [Person \(<Role>\) - Person: Primary Page](#).

Worker - Worker: User Profiles Page

Use the Worker - Worker: User Profiles page (RD_PERSON_USER) to maintain the worker's user profile.

Navigation

Click the User Profiles link on the Worker - Primary page.

Image: Worker - Worker: User Profiles: User Summary page

This example illustrates the fields and controls on the Worker - Worker: User Profiles: User Summary page. You can find definitions for the fields and controls later on this page.

Worker

Save | Create from Current | Copy Data | 360-Degree View | >> | Personalize

Name Mary Kumar **Employee ID** KU100

Worker | Job | Work Schedule | Skills and Competencies | Assignment Criteria | Groups | ▶

Primary | Details | **User Profiles**

User Summary Customize | Find | First 1-2 of 2 Last

User ID

KU100

<blank>

Add New User

Image: Worker - Worker: User Profiles: User Information Detail page

This example illustrates the fields and controls on the Worker - Worker: User Profiles: User Information Detail page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Worker - Worker: User Profiles: User Information Detail' page. At the top, there are tabs for 'Worker', 'Job', 'Work Schedule', 'Skills and Competencies', 'Assignment Criteria', and 'Groups'. The 'User Profiles' tab is selected, showing sub-tabs for 'Primary', 'Details', and 'User Profiles'. The main content area is divided into two sections: 'Logon Information' and 'Permission Lists'. The 'Logon Information' section contains three input fields: '*User ID' (with the value 'KU100'), '*Password', and '*Confirm Password'. The 'Permission Lists' section contains two input fields: 'Process Profile' (with the value 'ALLPAGES') and 'Primary' (with the value 'ALLPAGES'), and a checkbox labeled 'Locked Out?'. Below these sections is a 'Contact Roles' table. The table has three columns: 'Role Name', 'Description', and a column with '+' and '-' buttons for adding and removing roles. The table lists various roles such as 'Account Administrator', 'Account Manager', 'Advisor Admin', 'Advisor IT Setup', 'Advisor User', 'CRM Dashboard Administrator', 'CRM Dashboard User', 'CTI Administrator', 'CTI Agent', 'Call Center Agent', 'Call Center Contact Us: clone', 'Call Center Manager', 'Common Portal User' (with a dropdown menu showing 'EOPP_USER'), 'ERMS Agent', and 'ERMS Manager'. At the bottom of the page is an 'Additional User Setup' section with the text 'Use the links below to enter or view additional setup data:' and three links: 'CRM User Preferences', 'CTI Agent Information', and 'MCF Agent Information'.

A list of the user IDs that the worker is authorized to use appears in the User Summary region of this page. You can click a listed user ID to view and modify the details of the user ID or click the Add New User button to add a new user ID to the worker.

This page is similar in appearance and use to the Person - User Profiles page, except that the Additional User Setup region appears on the detail view of the page for workers in the GBL market.

Worker - Job: Job Details Page

Use the Worker - Job: Job Details page (RD_WORKER_DETAIL) to enter information about the specified worker's job.

Navigation

Select the Job tab from any page in the Worker component.

Image: Worker - Job: Job Details page

This example illustrates the fields and controls on the Worker - Job: Job Details page. You can find definitions for the fields and controls later on this page.

Worker

Save | Create from Current | Copy Data | 360 360-Degree View | >> | Personalize

Name Mary Kumar Employee ID KU100

Worker Job Work Schedule Skills and Competencies Assignment Criteria Groups

Worker Role Employee Assignment Start 07/23/2009

Job Details Find | View All First 1 of 1 Last

Effective Date 07/23/2009	Effective Sequence 0
Employee Status Active	HR Status Active
Job Indicator Primary	Source CRM
Reg/Temp Regular	Full/Part Time Full-Time
Job Code SetID SHARE	
Job Code KUC10	Job Sr. Customer Service Rep
Department SetID SHARE	GL Business Unit
Department KU016	Dept. Description Customer Service
Location SetID SHARE	
Location Code KUCA00	Location California Location
Physical Location	
Time Zone PST	
Holiday Schedule 2002	Schedule Year 2002
Supervisor ID 300044	Supervisor Angela Lucca
Officer Code None	Manager Level Non-Manager

Add New Job Details

Audit History

[Return to Summary](#)

* Required Field

By default, job details for the currently active primary job for the worker appear on this page. All workers can scroll through and view historical, current, and future job information. When the worker has existing job data and requires new job data, for example, a new supervisor ID, job code, or location, you add a new job details row with the new information. By default, the new effective date is the current date.

All users can update and delete effective-dated future job rows within a job assignment as long as at least one effective-dated row for each job assignment remains. All users can view historical, current, and future job data.

Secured Worker Information

You can perform these functions only if your sign-in role has secured worker access:

- Modify historical and current-dated job information records.
- Delete historical and current job information records.

- Modify the worker's employee status.
- View the worker's HR (Human Resources) status. Examples of HR status are *Active*, *Retired*, and *Terminated*.

Job Information

Worker Role

Select the worker's role.

The worker role indicates the worker's relationship to the organization. Values are *Employee* and *Contingent Worker*. This field is available only for the earliest job details record on an assignment.

Effective Date

Enter the effective date of the current job details. When you add new job details, the current date appears by default. All workers can view present, current, and future job details.

Effective Sequence

Sequences the order in which job detail records appear. When you add a new job details record, the system assigns it sequence number zero and increments the sequence numbers on the existing job details records by one. This is to ensure that job details appear in descending date order.

Job Indicator

Indicates that this is the primary job for the assignment. When you add a new job record and mark it as primary, the system recalculates the primary job assignment indicator.

Source

Indicates the source of the job record. Values are *HCM*, indicating that the job information was imported from the HCM system and *CRM*, indicating that the information was entered in CRM. You cannot update job records that originated in the HCM system.

GL Business Unit (General Ledger business unit)

Enter the business unit that is used to account for the worker's costs on the general ledger.

Physical Location

Enter a description of the worker's physical location. You can use this field to specify locations such as an office or cubicle number.

Holiday Schedule

Select the holiday dates that are valid for this worker.

Supervisor ID

Select the supervisor to whom this worker reports.

Officer Code

Select an officer code to identify highly compensated employees for the Non-Discrimination Testing - 401(k)/401(m) report (NDT004).

Manager Level

Select the worker's management level, if applicable.

Return to Summary

Click this link to view the Job Summary page, which lists summary information about the worker's assignments.

Entering Job Codes, Departments, and Locations

Job Code, Department, and Location Code are controlled by setID. You must enter the corresponding setID, and only values for the setID are valid. This information is defined when you set up worker foundational data.

Related Links

[Setting Up Foundational Data for Workers](#)

Worker - Job: Job Summary Page

Use the Worker - Job: Job Summary page (RD_ASGN_JOB) to view assignment summary information for the worker.

Navigation

Select the Job tab from any page in the Worker component.

Scroll to the bottom of the Job Detail page and click the Return to Summary link.

Image: Worker - Job: Job Summary page

This example illustrates the fields and controls on the Worker - Job: Job Summary page. You can find definitions for the fields and controls later on this page.

Worker

Save | Create from Current | Copy Data | 360 360-Degree View | >> Personalize

Name Mary Kumar Employee ID KU100

Worker Job Work Schedule Skills and Competencies Assignment Criteria Groups

Job Summary

Primary	Assignment Description	Current Job Date	Assignment Start	Assignment End	Role	Employee Status
<input checked="" type="checkbox"/>	Sr. Customer Service Rep	07/23/2009	07/23/2009	12/31/2999	Employee	Active

Add Job Assignment

Use this page to view summary information from all the assignments the worker has had and drill down into the job details for any past, current, or future assignment. The system determines the assignment start and assignment end date from the dates of the job detail records for the assignment. The system also determines the primary assignment for the worker

Add Job Assignment

Click to add a new job assignment. New job assignments are added with the *Hire* action/reason. When you add a new job assignment, the Job Details page appears.

Worker - Work Schedule Page

Use the Worker - Work Schedule page (RD_WORKER_SCHEDULE) to define default workdays for the specified worker.

Navigation

Select the Work Schedule tab from any page in the Worker component.

Image: Worker - Work Schedule page

This example illustrates the fields and controls on the Worker - Work Schedule page. You can find definitions for the fields and controls later on this page.

Worker

Save | Create from Current | Copy Data | 360-Degree View | >> Personalize

Name Mary Kumar Employee ID KU100

Worker Job Work Schedule Skills and Competencies Assignment Criteria Groups

Time Zone

Time Zone Pacific Time (US)

Scheduling Options

☒ Monday ☒ Tuesday ☒ Wednesday

Start End Start End Start End

8:00AM 5:00PM 8:00AM 5:00PM 8:00AM 5:00PM

☒ Thursday ☒ Friday ☐ Saturday

Start End Start End Start End

8:00AM 5:00PM 8:00AM 5:00PM

☐ Sunday

Start End

View Calendar

When evaluating worker availability for assignments, the system checks standard work week information that you define for the worker on this page.

Select the default work days for the specified person. The Start and End fields define the default hours of operation for the person. Enter start and end times for each work period in the day. You can enter multiple work periods to represent lunch breaks, shifts, and so forth. By default, the system populates these values with the standard work week information that you define for the installation.

Worker - Skills and Competencies Page

Use the Worker - Skills and Competencies page (RD_WORKER_CMP_PROF) to associate the specified worker with a competency and define the worker's level of proficiency for the competency.

Navigation

Select the Skills and Competencies tab from any page in the Worker component.

Image: Worker - Skills and Competencies page

This example illustrates the fields and controls on the Worker - Skills and Competencies page. You can find definitions for the fields and controls later on this page.

Worker

Save | Create from Current | Copy Data | 360-Degree View | >> | Personalize

Name Mary Kumar Employee ID KU100

Worker Job Work Schedule Skills and Competencies Assignment Criteria Groups

Assigned Competencies Customize Find First 1-4 of 4 Last

*Competency	*Proficiency
Repair Freezer	Certified Technician
Certified in Refrigeration	Yes
Customer Rep Experience	5-Expert
Appliances Service & Repair	1-Little

Add Competency

Important! Before assigning competencies on the Worker - Skills and Competencies page in CRM, you must select the Use Only Evaluation Type installation option.

The Person Competency EIP loads competency data with all evaluation types into CRM. Although the evaluation type does not appear in CRM, CRM pages list only the competency records that match the specified evaluation type. If you do not specify an evaluation type during the installation, competency records for all evaluation types are available, which can degrade system performance.

Description

Select a competency that is associated with the worker. In CRM, you establish competencies on the Competencies page under Set Up CRM, Common Definitions, Competencies.

Proficiency

Enter the worker's level of expertise for the competency. The rating model that is defined for the competency on the Competencies page determines the available proficiency values. In PeopleSoft FieldService, the system checks a worker's proficiency level for a competency to determine whether the worker is qualified to perform work on a service order that requires the competency. In PeopleSoft Support and PeopleSoft HelpDesk, the system checks a worker's proficiency level for a competency to determine whether the worker is qualified to perform work on a case that requires expertise in the problem type.

Worker - Assignment Criteria Page

Use the Worker - Assignment Criteria page (RD_WORKER_CRITERIA) to define criteria that the assignment engine uses to match the specified worker to a case or service order.

Navigation

Select the Assignment Criteria tab from any page in the Worker component.

Image: Worker - Assignment Criteria page (1 of 2)

This example illustrates the fields and controls on the Worker - Assignment Criteria page (1 of 2). You can find definitions for the fields and controls later on this page.

Worker

Save | Create from Current | Copy Data | 360 360-Degree View | >> Personalize

Name Mary Kumar Employee ID KU100

Worker Job Work Schedule Skills and Competencies Assignment Criteria Groups

Region Customize Find

*Description
Northern California

Customer Customize Find

SetID *Customer Site

Product Customize Find

*SetID	*Description	*Skill Level		
I PROD	24.7 cu. Ft. Refrigerator w/Fc	Certified Technician	+	-
I PROD	26.7 cu. Ft. Refrigerator w/Fc	Certified Technician	+	-
I PROD	21.6 cu. Ft. Top Refrigerator	Certified Technician	+	-
I PROD	22.8 cu. Ft. Chest Freezer Man	Certified Technician	+	-
I PROD	Custom Build Freezer Package	Certified Technician	+	-
I PROD	14.8 cu. Ft. Chest Freezer Fla	Certified Technician	+	-
I PROD	17.8 cu. Ft. Chest Freezer Man	Certified Technician	+	-
I PROD	7.2 cu. Ft. Lab Freezer	Certified Technician	+	-
I PROD	Sectional Walk-in Freezer	Certified Technician	+	-

Image: Worker - Assignment Criteria page (2 of 2)

This example illustrates the fields and controls on the Worker - Assignment Criteria page (2 of 2). You can find definitions for the fields and controls later on this page.

Product Group		Customize	Find	1/2	
*SetID	*Product Group				
IPROD	FREEZER				+ -
IPROD	REFRIDGE				+ -
IPROD	WALK-INS				+ -
IPROD	DISH-WASH				+ -
IPROD	DISPOSER				+ -

Person Type		Customize	Find	1/2	
*Person Type					
Contingent Worker					+ -

Location		Customize	Find	1/2	
*SetID	*Location				
CRM01	Winnipeg Office				+ -

Department		Customize	Find	1/2	
*SetID	*Description				
					+ -

Security Role		Customize	Find	1/2	
*Role Description					
Field Service Agent					+ -

The system uses the values in the Customer, Region, Product, Product Group, Location, Department, and Role fields to evaluate how suitable a worker is for assignment to the service order, case, or change request task relative to other workers in the provider group.

When you perform an assignment search from a case, service order, or change request task, the assignment engine calculates a point value for each criteria value on the service order, case, or change request task that the worker matches based on the weight, or relative importance, of the match. The sum of the point values divided by the total possible points for the service order or case becomes the worker's fit score. Failure to match individual criteria lowers the worker's total fit score but does not exclude the worker from the list of suggested assignment candidates. Failure to match any criteria excludes the worker from the suggested candidates.

The assignment engine uses a different set of assignment criteria values for cases in PeopleSoft HelpDesk, cases in PeopleSoft Support, service orders in PeopleSoft FieldService, or tasks in PeopleSoft Change Management. For help desk cases, the assignment engine matches values for location, product, and product group. For both support cases and service orders, the assignment engine matches values for customer, site, region, product, and product group. For tasks in Change Management, the assignment engine matches values for location, department, either product or product group, and role.

Region

Enter the worker's region. The assignment engine matches the worker's region to the region on the service order or case.

Customer

If the worker can support the customer at any site, enter the customer and leave the Site field blank. You can also select a site without specifying a customer.

Product

The values for the Proficiency field depend on the product rating model that you specify for the setID when you set up the assignment engine.

Product Group

Enter the product groups that the worker supports and the setIDs of the product groups.

Location

Enter the worker's location and the location setID. The assignment engine matches the worker's location for change management tasks.

Department

Enter the worker's department and setID of the department.

Role

Enter the description of the worker's role. This is used to assign change management tasks to workers.

Worker - Groups Page

Use the Worker - Groups page (RD_WORKER_GROUPS) to associate the worker with provider groups and group worklists.

Navigation

Select the Groups tab from any page in the Worker component.

Image: Worker - Groups page

This example illustrates the fields and controls on the Worker - Groups page. You can find definitions for the fields and controls later on this page.

Save

Create from Current

Copy Data

360 360-Degree View

>>

Personalize

Name

Mary Kumar

Employee ID

KU100

Worker

Job

Work Schedule

Skills and Competencies

Assignment Criteria

Groups

Provider Group Membership

Customize

Find

First

1-7 of 7

Last

SetID	Provider Group Name	Status
COM01	Fraud Team	Active
IPROD	Complaint Services	Active
IPROD	Contact Us	Active
IPROD	Dishwasher/Appliance Support	Active
IPROD	Case Escalation	Active
IPROD	Freezer/Refrigeration Support	Active
IPROD	Self Service Cases	Active

Add Group

Group Worklist Membership

Customize

Find

First

1-9 of 9

Last

User ID	Group Worklist Name	Owner
KU100	CaseEscalation-APP01	
KU100	ComplaintServices-APP01	
KU100	ContactUs-APP01	
KU100	Dishwasher/AppSupport-APP01	
KU100	Freezer/FridgeSupport-APP01	
KU100	IPROD_Complaints	
KU100	IPROD_INVESTOR	
KU100	OrderInquiry-APP01	
KU100	SelfServiceCases-APP01	

Add Worklist

Worker - Storage Locations Page

Use the Worker - Storage Locations page (RD_WORK_STORLOC) to define inventory storage locations that are associated with good and defective storage locations on a field service worker's truck.

Navigation

Select the Storage Locations tab from any page in the Worker component.

Image: Worker - Storage Locations page

This example illustrates the fields and controls on the Worker - Storage Locations page. You can find definitions for the fields and controls later on this page.

Worker

Save | Create from Current | Copy Data | 360 360-Degree View | >> Personalize

Name Mary Kumar Employee ID KU100

Assignment Criteria Groups Storage Locations Signature Notes Contact Info More Info

Worker's Storage Locations Customize Find View All First 1 of 1 Last

*Location Type	*IN Unit	*Area	Level 1	Level 2	Level 3	Level 4
Good						

Storage location information is required only for workers who perform field service activities. Material movement transactions that are initiated from the Manage Material page in PeopleSoft FieldService update quantities in the inventory storage locations that are associated with the lead technician on the service order line.

You must define one and only one good truck stock location and one and only one defective truck stock location for each field service worker. The good and defective locations can't have the same storage location definition—the area and up to four storage levels—in PeopleSoft Inventory or a third-party inventory system.

Location Type

Select the type of material location that is on the truck. Values are:

Good: The location for material that is used to complete a service request at a customer's site.

Defective: The location of material that was removed from a customer's site. Typically, the worker returns this stock to the central distribution center for inspection or scrap processing.

IN Unit (inventory unit)

Enter the identification of the inventory business unit with the material storage location that corresponds to the material location type that is on the worker's truck. You define the inventory business unit in PeopleSoft Inventory or a third-party inventory system and insert it in the CRM system by using the Business Unit EIP.

See [Understanding Enterprise Integration Technology](#).

Area, Level 1, Level 2, Level 3, and Level 4

Enter the material storage area in PeopleSoft Inventory or a third-party inventory system that corresponds to the material location type that is on the worker's truck. You can define a storage location address in an inventory system by using a storage area and up to four levels representing a physical subdivision of the storage area, such as aisles, rows, shelves, and bins.

Important! No prompts are available for the storage location definition fields Area, Level 1, Level 2, Level 3, and Level 4. Unlike business units, storage location information is not synchronized with an inventory system. You must know the correct storage location definitions to enter. Material movement transactions that are initiated from the Manage Material page are successfully recorded in the inventory system only if the storage location definition that you enter is a valid storage location for the inventory business unit that is referenced in the IN Unit field.

See the product documentation for *PeopleSoft Inventory*.

Related Links

"Truck Stock Storage Locations" (PeopleSoft CRM 9.2: Integrated FieldService)

"Setting Up the Order Materials Component" (PeopleSoft CRM 9.2: Integrated FieldService)

Worker - Signature Page

Use the Worker - Signature page (RD_WORKER_WF_SIG) to define a default signature to use when the specified worker sends manual notifications.

Navigation

Select the Signature tab from any page in the Worker component.

In the Notification Signature field, enter the default signature that is used when someone sends manual notifications. When this person clicks the Notification button from a transaction and accesses the Outbound Notification page, this signature appears in the Message field.

Setting Up Foundational Data for Workers

To set up foundational data for workers, use the Location (LOCATION_TBL), Department (DEPARTMENT), Job Code (RB_JOB_CODE), and Cost Category (RF_COST_CAT) components.

These topics discuss how to:

- Set up location codes.
- Set up department codes.
- Set up job codes.
- Set up cost categories.
- Set up competencies.

Note: In addition to worker-specific foundational data, worker records also reference general foundational data, such as setIDs, location codes, and salutation codes. For more information, refer to the table-loading sequence for the CRM application. You can find table-loading sequences for each product on the My Oracle Support web site.

Pages Used to Set Up Foundational Data for Workers

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Location Page</u>	LOCATION_TBL	Set up location codes.
<u>Department Page</u>	DEPARTMENT	Set up information about the organization's departments.
<u>Job Codes Page</u>	RB_JOB_CODE	Set up codes for the jobs in the organization.
<u>Cost Categories Page</u>	RF_COST_CAT	Set up cost categories.
Worker Function	RD_WRK_FUNC_TBL	Set up worker functions.
<u>Competencies Page</u>	COMPETENCY_TABLE	Set up competencies.

Related Links

[Understanding Enterprise Integration Technology](#)

Location Page

Use the Location page (LOCATION_TBL) to set up location codes.

Navigation

Set Up CRM, Common Definitions, Location, Location

Department Page

Use the Department page (DEPARTMENT) to set up information about the organization's departments.

Navigation

Set Up CRM, Common Definitions, Employee Data, Department, Department

Image: Department page

This example illustrates the fields and controls on the Department page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Department TEST' page. At the top, there are tabs for 'SetID CRM01', 'Department TEST', and 'Location'. Below the tabs is a header bar with 'Department Information' on the left and navigation controls 'Find | View All', 'First', '1 of 1', and 'Last' on the right. The main form area contains several fields: '*Effective Date' with a date picker set to 09/15/2002, '*Status' with a dropdown menu set to 'Active', '*Description' with a text box containing 'Human Resource', 'Short Description' with a text box containing 'HR', 'Manager EmplID' with a text box and a magnifying glass icon, and 'Manager Name' with a text box. There are also '+' and '-' buttons on the right side of the form.

Note: Instead of entering information directly into CRM, you can maintain department codes in PeopleSoft HCM or a third-party system and move the department data to CRM by implementing the Department Table EIP.

Job Codes Page

Use the Job Codes page (RB_JOB_CODE) to set up codes for the jobs in the organization.

Navigation

Set Up CRM, Common Definitions, Employee Data, Job Codes, Job Codes

Image: Job Codes page

This example illustrates the fields and controls on the Job Codes page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Job Codes' page. At the top, there are tabs for 'SetID CRM01' and 'Job Code TEST'. Below the tabs is a header bar with 'Job Code Description' on the left and navigation controls 'Find | View All', 'First', '1 of 1', and 'Last' on the right. The main form area contains several fields: '*Effective Date' with a date picker set to 09/15/200, '*Status' with a dropdown menu set to 'Active', and '*Description' with a text box containing 'Human Resource Analyst'. There are also '+' and '-' buttons on the right side of the form.

You can also maintain job codes in PeopleSoft HCM or a third-party system and move the job code data to CRM by implementing the Job Code Table EIP.

Cost Categories Page

Use the Cost Categories page (RF_COST_CAT) to set up cost categories.

Navigation

Set Up CRM, Common Definitions, Employee Data, Cost Categories, Cost Categories

Image: Cost Categories page

This example illustrates the fields and controls on the Cost Categories page. You can find definitions for the fields and controls later on this page.

*Cost Category Code	*Description	Short Description	
AFTR	After Hours	After Hour	
DOUB	Double Time	Double	
HALF	Time and Half	1.5	
PAGER	Pager	Pager	
STRT	Straight Time	Straight	
TRAVL	Travel	Travel	

[Add Cost Category](#)

Competencies Page

Use the Competencies page (COMPETENCY_TABLE) to set up competencies.

Navigation

Set Up CRM, Common Definitions, Competencies, Competencies, Competencies

Image: Competencies page


This example illustrates the fields and controls on the Competencies page. You can find definitions for the fields and controls later on this page.


Competencies




Competency ID 1208

***Description**

Short Description

***Rating Model**  Competency Management Scale

Comments 

Competency Types		Personalize	Find			First	1 of 1	Last
Type	Description							
<input type="text" value="HARDW"/> 	Hardware and Networks							

Worker competency information determines which workers are best qualified for assignment to a case or service order. CRM enables you to define competency information and associate it with workers by using competency codes. You can also maintain competency data in PeopleSoft HCM or a third-party system and move the competency data to CRM by implementing the following EIPs: Competency Type, Rating Model, and Competency.

Chapter 13

Working with Predefined Business Object Search and Quick Create Data

Understanding Delivered System Data for BO Search and Quick Create

This topic discusses the following delivered system data:

- Field definitions.
- Quick create definitions and templates.
- Search roles.
- Search definitions.
- Criteria fields.
- Adapter definitions.

Delivered System Data

PeopleSoft CRM delivers system data for business object searches and quick create definitions that are delivered as part of the PeopleSoft CRM suite of products. Before defining new searches or quick create definitions, examine the delivered system data to fully understand the setup requirements.

See [Understanding BO Search and Quick Create Setup](#).

Field Definitions

This topic provides a summary list of the fields that are provided by PeopleSoft CRM. For more detail on how a field is defined in the system, access the Field page and search for the field description.

See [Field Page](#).

<i>Field Description</i>	<i>Field Name</i>	<i>Role Types</i>
Account	RBTACCTNO	<ul style="list-style-type: none">• Contact (8)• Individual Consumer (9)• Account Owner (Individual) (65)• Account Owner (Organization) (66)• Account Owner (Rep.) (67)

Field Description	Field Name	Role Types
Account ID	RBTACCTID	<ul style="list-style-type: none"> • Contact (8) • Individual Consumer (9) • Sold To Organization (42) • Sold To Individual (46) • Account Owner (Individual) (65) • Account Owner (Organization) (66) • Account Owner (Rep.) (67)
Address Address 1	CO_CONCAT ADDRESS 1	<ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
AGREEMENT ID	AGREEMENT_CODE	<ul style="list-style-type: none"> • Company (2) • Contact (8) • Individual Consumer (9)
Birthday	BIRTHDATE	<ul style="list-style-type: none"> • Contact (8) • Individual Consumer (9)

Field Description	Field Name	Role Types
City	CITY	<ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
Country	COUNTRY	<ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
Created by	ROW_ADDED_OPRID	Worker(4)
Created Date	ROLE_START_DT	Worker(4)

Field Description	Field Name	Role Types
Currency	CURRENCY_CD	<ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47)
Customer ID	CUST_ID	<ul style="list-style-type: none"> • Company (2) • Individual Consumer (9)
Department Name	DESCR	<ul style="list-style-type: none"> • Worker (4) • Person of Interest (88)
Email	CM_CONCAT	<ul style="list-style-type: none"> • Worker (4) • Contact (8)) • Individual Consumer (9) • Account Owner (Individual) (65) • Account Owner (Rep.) (67) • Person of Interest (88)
Employee ID	EMPLID	<ul style="list-style-type: none"> • Worker (4) • Person of Interest (88)
Extension	EXTENSION	Worker (4)

Field Description	Field Name	Role Types
First Name	FIRST_NAME	<ul style="list-style-type: none"> • Worker (4) • Contact (8) • Individual Consumer (9) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
Last Name	LAST_NAME	<ul style="list-style-type: none"> • Worker (4) • Contact (8) • Individual Consumer (9) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
Location Name	RC_LOC_DESCR	<ul style="list-style-type: none"> • Worker • Person of Interest (88)

Field Description	Field Name	Role Types
Name	BO_NAME_DISPLAY	<ul style="list-style-type: none"> • Person (1) • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88) • Organization (20008)
National ID	NATIONAL_ID	<ul style="list-style-type: none"> • Contact (8) • Individual Consumer (88) • Worker (4) • Person of Interest (88)

Field Description	Field Name	Role Types
Phone	CM_CONCAT	<ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
Physical Location	PHYSICAL_LOCATION	Worker (4)
PIN	PERSON_PIN	<ul style="list-style-type: none"> • Contact (8) • Individual Consumer (9)
Postal	POSTAL	<ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)

Field Description	Field Name	Role Types
Serial Number	SERIAL_ID	<ul style="list-style-type: none"> • Company (2) • Contact (8) • Individual Consumer (9)
Service Phone	RBTPHONENUMBER	<ul style="list-style-type: none"> • Contact (8) • Individual Consumer (9)
SIN	SIN	<ul style="list-style-type: none"> • Company (2) • Site (3) • Individual Consumer (9)
Site ID	SITE_ID	Site (3)
SSN/TIN	TIN	<ul style="list-style-type: none"> • Company (2) • Site (3) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31)
State	STATE	<ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
Stock Symbol	STOCK_SYMBOL	Company (2)

Field Description	Field Name	Role Types
Suffix	NAME_SUFFIX	Worker (4) Contact (8) Individual Consumer (9) Ship To Individual (45) Sold To Individual (46) Bill To Individual (47)
TIN Type	TINTYPE	<ul style="list-style-type: none"> • Company (2) • Site (3) • Contact (8) • Individual Consumer (9) • Alternate Capacity (31)

Quick Create Definitions and Templates

Refer to the Quick Create search page for a list of system delivered quick create definitions and templates.

See [Template Page](#), [Quick Create Page](#).

Search Roles

Refer to the Search Role search page for a list of system delivered search roles.

See [Role Page](#), [Search Role Page](#).

Search Definitions

Refer to the (BO) Search search page for a list of system-delivered search definitions.

See [Search Page](#).

Criteria Fields

Refer to the Criteria search page for a list of system-delivered criteria fields.

See [Criteria Page](#).

Adapter Definitions

Refer to the Adapter search page for a list of system-delivered adapters.

See [Sections Page](#), [Adapter Page](#).

Using Business Object Search and Quick Create Functionality

Understanding the Business Object Search and Quick Create Process

These topics discuss:

- Business object search.
- Customer identification.
- Quick create functionality.
- BO search and Quick Create runtime example.

Business Object Search

When users create a transaction in PeopleSoft CRM and do not know the specific value for a business object that the transaction uses, they can invoke a business object search to find the field value. The system determines the information that is needed depending on the page where the business object search was initiated and searches for the business object.

If the business object is not uniquely identified from the information that the user enters, a search page that contains both a list of objects that are potential matches and additional search fields appears.

Related Links

[Understanding Delivered System Data for BO Search and Quick Create](#)

[Customer Information Subpage](#)

[Adding and Modifying BO Search and Quick Create Definitions](#)

Customer Identification

The customer identification framework uses business object search to provide an easy and consistent way to identify the customer—company, consumer, contact, or site—for a transaction.

Each transaction page has one or more subpages that contain the fields for entering customer, contact, and other information such as phone, site, identification number, or account number.

The subpages that appear and fields that appear on each subpage vary depending on the information that each transaction needs. For example, the customer information fields for order capture are Customer, First Name, and Last Name while the fields for creating a support case are Company, First Name, Last Name, and SIN (Service Identification Number). The customer information subpage might have one or two columns, depending on the needs of the page layout.

The user enters information in one or more fields and initiates a search. If a business object that uniquely matches the criteria that are entered is found, it is returned to the customer information subpage. If not, a page containing additional search criteria and a list of potential matches appears. The user can:

- Select a record.
- Refine the search criteria and search again.
- Create a new object using quick create.

Quick Create Functionality

The quick create functionality in PeopleSoft CRM enables users to create business objects quickly and easily without navigating to the business object components. This functionality is available either from within a PeopleSoft CRM application or by using the standalone Quick Create component.

Quick create definitions that are set up in the system and associated with transactions enable users to enter the subset of business object information that is required to define a business object and save it to the database. The business object information that is created is returned to the application so that the business process can continue. Some quick create definitions are set up to create more than one business object and the relationships between the business objects at the same time. For example, the *The Company with Contact* definition creates both a company and a contact.

You access the Quick Create component:

- As a standalone component by selecting Customers CRM.
- From the business object search page within a PeopleSoft CRM transaction.
- Directly from a PeopleSoft CRM application component, such as the Create Order transaction.

BO Search and Quick Create Runtime Example

For example, a call center agent might receive a call from a contact named Larry Hill who represents a customer company named MMA Property Management. The agent opens a case and searches for a company name of MMA with a last name of Hill.

If the information that the agent enters does not uniquely identify a customer and contact, the advanced search page appears. This page contains both expanded search criteria fields and a search results section that lists all companies whose name begins with the letters MMA that are represented by a contact with a last name of Hill. The agent can then:

- Select the correct company and contact combination.
- Enter additional search criteria, and search again.
- Define a new company with contact.

This option uses the quick create feature.

BO Search System Processing

The following tasks occur without the user being aware of them:

- The transaction adapter determines, based on the transaction, what fields appear on the customer information subpage and the criteria definition that defines the advanced search page.
- The criteria definition determines what criteria fields appear on the advanced search page, how they appear, and the search definitions to invoke.
- The search definition determines the roles to search for the criteria fields, the fields that appear in the search results, how the search results appear, and the quick create definition that the user accesses to create a new business object.
- For each role that is searched, the search role determines the security that is applied, the relationships for the role, and whether fields appear in the search criteria or results that are set for the role.
- The field definitions determine how the search fields appear on the page, the database records that are searched for each field, and how the user can search for the field.

Quick Create System Processing

The following tasks occur without the user being aware of them:

- The quick create definition determines which quick create templates to display to the user.
- The quick create template definitions determine both the fields that appear on the quick create page and the criteria that are used to search for existing objects of the type that is defined.

Related Links

[Understanding Delivered System Data for BO Search and Quick Create](#)

Searching for Business Objects

These topics discuss how to:

- Identify customers for transactions.
- Search for business objects.

Pages Used to Search for Business Objects

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Search For <object> Page	RBQ_BOSRCH	Search for a business object in the PeopleSoft CRM database.


Customer Information Subpage

Access the customer information subpage on any transaction that is enabled for customer identification.

Note: The example shown is from the Add Case component. The fields that appear in the Customer Information page region are specific to Case searches. Other components that use this feature function similarly, although the fields might vary.

Image: Case page

This example illustrates the fields and controls on the Case page. You can find definitions for the fields and controls later on this page.

The screenshot shows a web interface with a tabbed menu at the top containing 'Case', 'Solution', 'Summary', 'Notes', and 'Tasks'. The 'Case' tab is selected. Below the tabs is a section titled 'Customer Information'. Inside this section, there are four labeled text input fields: 'Company', 'First Name', 'Last Name', and 'SIN'. At the bottom left of the 'Customer Information' section is a yellow 'Search' button. To the right of the 'Search' button is a blue hyperlink labeled 'Advanced Search'.

Enter any information that you know and click Search. If the customer is not uniquely identified by the information that you enter, an advanced search page appears. You can also click the Advanced Search link to access the Search for <object> page.

Advanced Search

When you initiate the advanced search, the Search for <object> page appears. This page enables you to refine the search fields that you enter on the customer information subpage. This page contains additional search criteria and, depending on how the search criteria are set up, a link that accesses a quick create page to create a new business object or objects.

Search For <object> Page

Use the Search For <object> page (RBQ_BOSRCH) to search for a business object in the PeopleSoft CRM database.

Navigation

- Customers CRM, Business Object Search
- Enter customer information in any Customer Information group box on a transaction.
- Click the Advanced Search link on any page that is enabled for BO search.
- Click the search icon next to any field on a PeopleSoft CRM component or on transaction pages that are enabled for BO search.

Image: Search For Customer page

This example illustrates the fields and controls on the Search For Customer page . You can find definitions for the fields and controls later on this page.

Search For Customer

Search

Company begins with

First Name begins with

Last Name begins with

Phone begins with

Email =

Address begins with

City begins with

State =

Postal =

Country =

PIN =

SIN =

Serial Number =

Agreement ID =

Select Action

Search Results

Last Name	First Name	Company	Consumer Last Name	Consumer First Name
Hill	Kelly		Hill	Larry
Hill	Larry			
Hill	Larry	Sparkle Clean Laundromats		

This page is identical to the advanced search pages that appear for customer identification. This page contains additional search criteria. In the example above, the user can create a new company with a contact.

Select Action

Select a listed action and click Go to access a Quick Create page where you can create a new business object of the type for which you are searching.

This field appears only if the quick create option is defined for the business object search that you initiated. The available actions are also determined by the business object search definition. If there is only one quick create option defined for the search, then a link to the Quick Create page appears.

Search Results

If more than one business object meets the search criteria, the Search Results grid appears. The results are either:

- Single-select.

With single-select, one and only one business object can be returned from the search. The results appear in a list with each item identified as a link. When you click the link, the item is returned to the field from which the search was initiated.

- Multi-select.

With multi-select, more than one business object can be returned from the search. A check box appears next to each item. You select the desired items or click the Check All/Clear All link, then click the Select button to return the items to the calling page, where they appear in a grid.

Creating Business Objects by Using the Quick Create Component

This topic discusses how to create business objects by using quick create functionality.

Note: The functionality of the Quick Create page is flexible and enables you to create as many business objects as you want without leaving the page.

Page Used to Create Business Objects by Using Quick Create Functionality

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Create <Quick Create Definition Name> Page</u>	RBQ_QCREATE	Create business objects.

Create <Quick Create Definition Name> Page

Use the Create <quick create definition name> page (RBQ_QCREATE) to create business objects.

Navigation

- Customers CRM, Quick Create, Quick Create
- Click the link or Go button next to the Create New field on the business object lookup page.
- Click the Create New button on a PeopleSoft CRM application page.

Image: Example of creating company contacts on the Creating Company with Contact page (1 of 2)

This example illustrates the fields and controls on the Example of creating company contacts on the Creating Company with Contact page (1 of 2). You can find definitions for the fields and controls later on this page.

Create Company with Contact

*SetID SHARE

Company

[Search Existing Company](#)

*Name

*Currency

Purchasing Options

☒ **Sold To Customer** This company can make purchases.

☒ **Bill To Customer** This company can receive bills.

☒ **Ship To Customer** This company can receive shipments.

Contact Info Entries

Contact Info

*Description

Phone	Country Code	Number	Ext/PIN
*Type <input type="text" value="Business"/>	<input type="text"/>	<input type="text"/>	<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"/>

Email

*Type	Email Address
<input type="text" value="Business"/>	<input type="text"/>
<input type="text" value="Other"/>	<input type="text"/>

Address

[Look up Address](#) [More...](#)

*Type

*Country

Address 1

Address 2

Address 3

City

County

State

Postal

Image: Example of creating company contacts on the Creating Company with Contact page (2 of 2)

This example illustrates the fields and controls on the Example of creating company contacts on the Creating Company with Contact page (2 of 2). You can find definitions for the fields and controls later on this page.

These screenshots show the quick create page for the Company with Contact definition. Most quick create pages look identical for they use common group boxes and fields to collect information. Some pages contain additional fields to capture data that is specific to the corresponding business objects.

Refer to the Defining Person Business Objects topic for field descriptions of these common group boxes and fields.

SetID

Enter the setID for the objects that you are creating. This field appears only for objects that are controlled by a setID and is defined on the quick create definition.

Search Existing <BO>

Click this link to search for existing business objects that match the search criteria that you entered. For example, if you enter a company name of *MMA*, you can search for existing companies whose names start with MMA. This helps to ensure that you do

not enter duplicate data for business objects that already exist in the system.

POI Type

Select a type for the person of interest. This field is available only when you create POIs.

Available values come from on the Person of Interest Type page. Typically, POI types are synchronized from HCM for use in CRM through the PERS_POI_SYNC EIP. If you wish you create new POI types in CRM, it is recommended that you first create the POI type in your HCM system and synchronize it to CRM.

Description

Enter the description (if default value is not suitable) for the contact information you entered. This is required only if you have entered contact information.

Country

Fields in the Address group box can change depending on the country you select as part of the address, so that the right information can be captured in the format as required by specific countries.

Look up Address

Search an existing address that you can reuse for this business object you are creating. Enter at least one search criterion. For example, you are creating a POI for a woman who are calling to log a case. Since his husband works in the company, the agent maybe able to use his address that already exists in the system as hers.

Apply Changes

Click to save updates you have made to the Contact Info Entries section. When you click this button, two links appear: Create Entry and Delete Entry, which allow you to perform these actions as needed.

Quick Create Process upon Save

When you save the Quick Create page, the system:

1. Verifies that all *required* fields are present.

If not, then the system returns an error message.

2. Creates the business object for each role that is present on the Quick Create page that has data.

For example, if the Quick Create page enables you to create a company and contact, but entering a contact is optional, then you can create a company without a contact. The contact is created only if you also enter contact data.

3. Creates the relationship between multiple roles if the information for these roles is present and the relationship between these roles is set up in the quick create template.

For example, if the quick create template enables you to create a company and a contact for the company at the same time, and also has a relationship set up between the two roles on the template,

then when you enter the different roles and their information on the Quick Create page, both the company and the contact are created and the contact is linked to the company.

4. Returns newly created data to the calling application if you access the Quick Create page from a PeopleSoft CRM application.

If you are in the standalone Quick Create component, then you remain on the Quick Create page after you save.

Related Links

[Understanding Persons](#)

[Create Worker Page](#)

Setting Up Business Object Search and Quick Create

Understanding BO Search and Quick Create Setup

These topics lists common elements and discuss:

- BO search runtime process.
- Quick create runtime process.
- BO search and quick create setup process.

Common Elements for BO Search and Quick Create Setup

Field

Search fields are common objects that are used in BO search and quick create definitions. A field definition specifies the location of the field in the database, how the system searches for the field, the label of the field on the user interface, and how the field is updated by quick create.

Fields are used in the following BO search and quick create elements:

- Search roles.
- Search definitions.
- Search criteria.
- Transaction adapter.
- Quick create templates.

Quick Create Template

A quick create template associates the fields that are entered with the business object roles that are updated when a user creates a business object using quick create. The criteria definition specifies the search criteria page on which quick create definitions that this template is associated with appear.

Quick Create Definition

A quick create definition is composed of one or more templates that appear to the user when the quick create definition is invoked. You can use the same quick create template in more than one definition.

Search Role

A search role definition associates field definitions to one or more role type. When user search for a field, only business objects that have a role that is associated with the field are returned in the search results.

Search roles are used in search definitions.

Search Definition

A search definition is a collection of search roles and quick create definitions. Search definitions specify the roles and fields that are searched for data that a user enters. If you specify a quick create definition on the search definition, then the quick create definition is enabled on the search results page.

You use search definitions in search criteria.

Search Criteria

Search criteria specify the search definitions that are invoked when the user enters data in certain fields on a component. You can specify a default search definition and up to four alternate definitions. You then select fields and associate each field with one or more search definitions. If you do not select a search definition for the field, then the default search definition is used.

You associate criteria definitions with adapter sections.

Adapter

The adapter specifies the BO search definitions and quick create definitions that are enabled for a particular component or transaction. The adapter also defines the fields that appear in basic search mode, the search criteria to invoke for these fields, and the subpages of the component upon which these fields appear. Adapter sections are embedded into CRM applications.

BO Search Runtime Processes

PeopleSoft Customer Relationship Management (PeopleSoft CRM) provides the capability for users to search for business objects that they need to reference on transactions or components. When users don't know the exact name of the business object to reference, they can initiate a BO search to find the business object based on any information that they might know. The system determines the information that it requires to locate the BO and presents a search page for the user to enter known information.

The customer identification framework also uses BO search technology without the user having to explicitly initiate a search.

When a user searches for an object that does not already exist in the system, some PeopleSoft CRM transactions provide quick create functionality that enables the user to create that object with a minimum set of data. For example, when a contact calls for service on behalf of a company, the customer service representative (CSR) verifies the contact's information by doing a BO search for the contact. If the contact is not found in the database, the CSR can create a contact immediately and associate it to the company.

BO search and quick create functions are tightly integrated with each other, and they use much of the same system data.

Related Links

[Understanding the Business Object Search and Quick Create Process](#)

[Customer Information Subpage](#)

BO Search and Quick Create Setup

This is the BO search and quick create setup process:

1. Define search fields.
2. Define quick create templates.
3. Enter a quick create definition.
4. Define search roles.
5. Enter a search definition.
6. Define search criteria.
7. Define the BO search and quick create adapter.

Note: Setting up BO search and quick create definitions requires a good understanding of roles and relationships in the system.

Related Links

[Business Object Relationship Modelling](#)

Delivered Definitions

PeopleSoft CRM delivers a robust set of predefined system data that meets most business requirements. Search the delivered definitions before attempting to modify or add new business object search or quick create definitions. To search the delivered definitions, access the setup component for that definition and run a search without entering search criteria. A list of all defined items appears.

Important! PeopleSoft does not support changes that you make to the search definitions delivered with PeopleSoft CRM. Implementation of any new search definitions that you create requires a coding effort, which is also not supported by PeopleSoft.

Related Links

[Understanding Delivered System Data for BO Search and Quick Create](#)

Adding and Modifying BO Search and Quick Create Definitions

These topics discuss how to:

- Define fields.
- Define roles for a field.

- Define quick create templates.
- Define relationships for a template.
- Set up quick create definitions.
- Associate search fields with a role type.
- Define BO searches.
- Define search criteria fields.
- Specify basic search criteria fields.
- Define fields for transaction subpages.

Pages Used to Add or Modify Search Definitions

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Field Page</u>	RBQ_FLDDFN	Define a field that is used in BO Search and quick create definitions.
<u>Role Page</u>	RBQ_FLDDFN_RL	View the roles that use the field definition. Each role that uses the field definition can override certain information that is defined for the field.
<u>Search Record Page</u>	RBQ_FLDDFN_REC	Specify characteristics of the record that is searched.
<u>Template Page</u>	RBQ_QCTMPL	Define a quick create template. This defines the business object roles that appear on the Quick Create page when quick create is initiated from a specific component.
<u>Relationships Page</u>	RBQ_QCTMPL_REL	Define the relationships between the roles defined on the quick create template.
<u>Quick Create Page</u>	RBQ_QCDFN	Set up a quick create definition and associate one or more quick create templates to it.
<u>Search Role Page</u>	RBQ_SRCHRL	Associate search fields with a role type.
<u>Search Page</u>	RBQ_SRCHDFN	Define a BO search with one or more search roles, search fields, and related BOs.
<u>Criteria Page</u>	RBQ_CRITDFN	Specify the advanced search criteria fields and advanced search definition.
<u>Adapter Page</u>	RBQ_ADPTR	Specify the basic search criteria fields.

Page Name	Definition Name	Usage
<u>Sections Page</u>	RBQ_ADPTR_SECT	Define the records and fields that appear on transaction subpages.
Labels	RBQ_ADPTR_LBL	Define labels.

Field Page

Use the Field page (RBQ_FLDDFN) to define a field that is used in BO Search and quick create definitions.

Navigation

Set Up CRM, Common Definitions, Customer, BO Search, Field, Field

Image: Field page

This example illustrates the fields and controls on the Field page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Field' page interface with the following sections and controls:

- Navigation Tabs:** Field (selected), Role, Search Record.
- General Options:**
 - *Field Name/Label:** Name
 - Field:** BO_NAME_DISPLAY
 - Secondary Field:** BO_NAME
 - Default:** (dropdown menu)
 - Alternate Character Field:** Alt Char Name
 - Mapping Reference:** BO_NAME
 - Field Upper:** BO_NAME_DISP_UPPER
 - Secondary Field Upper:** BO_NAME_UPPER
 - Parser:** (dropdown menu)
 - ☐ Is Related Language Field
 - ☒ Is Name Field
 - ☐ Is Alternate Character Field
 - Save As** button
- Display Options:**
 - Display Field:** (text input with search icon)
 - ☐ Display as Checkbox
- Search Operators:**
 - *Default Operator:** begins with
 - ☒ Allow Equals
 - ☐ Allow Not Equal
 - ☒ Allow Begins With
 - ☒ Allow Contains
 - ☐ Allow Greater Than
 - ☐ Allow Greater Than or Equal
 - ☐ Allow Less Than
 - ☐ Allow Less Than or Equal
- Quick Create Keystokes:**
 - Name Field:** NAME
 - Contact Info Field:** (text input with search icon)

The purpose of a field definition is to ensure that the same value is propagated across different BO search and Quick Create definitions. If the field is constrained by role type, the value is propagated across only the definitions for this role type. For example, the value that is entered on a transaction is propagated to the search criteria then to the Quick Create template. Field definitions are referenced either directly or indirectly in all BO Search and Quick Create definitions.

A field definition specifies:

- The location of the field in the database.
- How the system searches for the field.
- The label of the field on the user interface.
- How Quick Create updates the field.

General Options

The system uses the values you enter in this region to format the BO search and Quick Create pages for the field, to process values that are entered for the field, and to compare entries against the database for duplicates.

Field Name/Label	Enter text that appears for the field on the user interface. The text appears both as a search criteria value that the user can select and as a column in the list of results returned by the search.
Mapping Reference	Enter the name that is used by the adapter to refer to the field in the component buffer.
Field and Secondary Field	Enter the names of the fields that the system searches for values that the user enters at runtime. The system searches the secondary field only if it doesn't find a match in the first field entered.
Field Upper and Secondary Field Upper	For fields of data type String, enter the names of the upper case fields that corresponds to the Field and Secondary field. This significantly improves performance when not using a case sensitive search.
Default	Select <i>Country</i> , <i>Currency</i> , <i>Language Code</i> or <i>SETID</i> . If selected, the corresponding value that is specified in the preferences for the user is inserted into the record at runtime by default.
Parser	Select the method to use to convert data that is entered in the field. For example, <i>Unformatted</i> converts (925) 694-44249 into 9256944249.
Alternate Char Field	Select the alternate character field that is appears when the user ID is enabled for alternate character.
Is Related Language Field	Select to force translation of the field values to the user's language if the user is logged on with a language other than the base language.
Is Alternate Character Field	Select to indicate that the field is alternate character-enabled.
Is Name Field	Appears for the Name field definition only and is selected by default. You cannot deselect this option, nor can you add it to other field definitions. The Name field identifies the business

object. The Is Name Field indicator facilitates processing by keeping the business object name in memory.

Display Options

The entries in this page region control how the field appears on pages at runtime.

Display Field

Enter the name of the field that is used to display the values at runtime.

Display as Checkbox

Indicate that this field appears as a check box for display and entry. The *Y* and *N* values in the field are translated at runtime into the appropriate check box property (selected or not selected).

Search Operators

Select the default search operator and the search operators that are visible to the user when this field is searched.

Quick Create Keystrokes

Select the quick create field name(s) to which the field maps. If the field is entered as search criteria, and the search is unsuccessful, then system pre-populates the quick create field with the value that was entered as a search field.

Role Page

Use the Role page (RBQ_FLDDFN_RL) to view the roles that use the field definition.

Each role that uses the field definition can override certain information that is defined for the field.

Navigation

Set Up CRM, Common Definitions, Customer, BO Search, Field, Role

Image: Role page

This example illustrates the fields and controls on the Role page. You can find definitions for the fields and controls later on this page.

*Role Type	Label	Property Name		
Person	Sender		+	-
Company	Company		+	-
Site	Site		+	-
Worker	Employee		+	-
Contact	Contact		+	-
Individual Consumer	Consumer		+	-
Partner	Partner Company		+	-
Partnership	Partnership		+	-
Alternate Capacity	Alternate Capacity		+	-
Ship To Organization	Ship To Company		+	-
Sold To Organization	Customer		+	-
Bill To Organization	Bill To Company		+	-
Ship To Individual	Ship To Consumer		+	-
Sold To Individual	Sold To Consumer		+	-
Bill To Individual	Bill To Consumer		+	-

Use this page to indicate different role options for search fields. If the field is used by different role types, you can specify a different label to appear next to the field for each different role type. You can also specify a different property that is set for each role. The specifications you make on this page override the ones that you made on the Field page.

Role Type

Select a role type that is valid for this field. The system uses the role type to identify objects for which the field can be used as search criteria.

Property Name

Select a property name for this role. Quick create updates the property with the value that users enter in the corresponding field when they create a new business object using quick create functionality.

Search Record Page

Use the Search Record page (RBQ_FLDDFN_REC) to specify characteristics of the record that is searched.

Navigation

Set Up CRM, Common Definitions, Customer, BO Search, Field, Search Record

Image: Search Record page

This example illustrates the fields and controls on the Search Record page. You can find definitions for the fields and controls later on this page.

Field

Role

Search Record

Field Name/Label

Name

Role Options

Customize

Find

First

1 of 1

Last

Role Type	*Search Record	Search By Role	Search By Rel	Bypass Status	Secure		
<div></div>	<div>BO_NAME</div>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>+</div>	<div>-</div>

This page enables you to define how searches for role-specific fields are performed.

- Role Type

Enter the role type to which the search options apply. If no role type is entered, the options on this line apply to all role types.
- Search Record

Enter the name of the database record where BO Search looks for the field to display.
- Search By Role

Select search only views that contain both the BO_ID (business object identifier) and ROLE_TYPE_ID (role type identifier) fields.
- Search By Rel (Search By Relationship)

Select to search only views that contain both a BO_ID_1 and BO_ID_2 field.
- Bypass Status

Select to search all values of the contact information. If this check box is not selected, only the current values for all fields in the contact record are searched.

Template Page

Use the Template page (RBQ_QCTMPL) to define a quick create template.

This defines the business object roles that appear on the Quick Create page when quick create is initiated from a specific component.

Navigation

Set Up CRM, Common Definitions, Customer, BO Search, Quick Create Template, Template

Image: Template page (1 of 2)

This example illustrates the fields and controls on the Template page (1 of 2). You can find definitions for the fields and controls later on this page.

Quick Create Template

*Description: The Company with Contact

Label: Company with Contact

*Market: Global

Save As

Role Options Find First 1-2 of 2 Last

Role Type: Company

Label: Company

Criteria: The Company

☐ Include Purchasing Options

Purchasing Options

☐ Sold To Customer

☐ Bill To Customer

☐ Ship To Customer

☒ Include Contact Info Entry

Field Selection

Field Definition	Display Type		
Currency	Required		

Image: Template page (2 of 2)

This example illustrates the fields and controls on the Template page (2 of 2). You can find definitions for the fields and controls later on this page.

Role Type: Contact

Label: Contact

Criteria: The Person

☐ Apply Controlling BO

☒ Include Contact Info Entry

Field Selection

Field Definition	Display Type		

Quick Create templates associates the fields that are entered on Quick Create pages with the role and relationship types that are updated in the database when the user creates a new business object.

Market

Select the market for which this template is enabled.

Role Type	Select the role type for which you want to enable this quick create template.
Label	Enter the label that appears for this role type on the quick create page.
Criteria	Select the criteria definition that is invoked when searching for existing business objects from the Quick Create page. In the example page shot, when the user quick creates a <i>Company with Contact</i> , the <i>The Company</i> search definition is invoked to ensure that the company being created does not already exist.
Include Purchasing Options	Select to have the purchasing options appear on the Quick Create page.
Include Contact Info Entry	Select to include contact information for entry on the Quick Create page.
Apply Controlling BO	Select to have the system search for existing values of the role type only within logically related values for the parent business object. For example, if a company has multiple contacts, the system searches for contacts of the company only, regardless of whether other contacts with the search criteria exist.

Field Selection

Select one or more field definitions to include on the quick create template.

Related Links

[Maintaining Contact Information for Business Objects](#)

[Understanding Purchasing Options](#)

Relationships Page

Use the Relationships page (RBQ_QCTMPL_REL) to define the relationships between the roles defined on the quick create template.

Navigation

Set Up CRM, Common Definitions, Customer, BO Search, Quick Create Template, Relationships

Image: Relationships page

This example illustrates the fields and controls on the Relationships page. You can find definitions for the fields and controls later on this page.

Note: Defining template relationships is optional. Define relationships between roles only if you include more than one role on a template.

Role and Relationship Selection

This page region enables you to specify the relationships that are built between the roles that are defined on a quick create template.

Role Type 1 and Role Type 2 Select the role types that are defined on the template.

Relationship Type Select the relationship type between the two selected roles.

Quick Create Page

Use the Quick Create page (RBQ_QCDFN) to set up a quick create definition and associate one or more quick create templates to it.

Navigation

Set Up CRM, Common Definitions, Customer, BO Search, Quick Create, Quick Create

Image: Quick Create page

This example illustrates the fields and controls on the Quick Create page. You can find definitions for the fields and controls later on this page.

Quick Create

Quick Create Definition

*Description:

Quick Create Template Customize | Find | | First 1-4 of 4 Last

Quick Create Template	Primary			
<input type="text" value="The Company"/>	<input type="checkbox"/>		<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="The Company with Contact"/>	<input checked="" type="checkbox"/>		<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="The Consumer"/>	<input type="checkbox"/>		<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="The Consumer with Contact"/>	<input type="checkbox"/>		<input type="button" value="+"/>	<input type="button" value="-"/>

Quick Create Template

Select one or more templates to associate with the definition.

Primary

Select to indicate that the template is the primary, or controlling, template used by the quick create definitions.

Primary templates appear first on the runtime Quick Create page.

Search Role Page

Use the Search Role page (RBQ_SRCHRL) to associate search fields with a role type.

Navigation

Set Up CRM, Common Definitions, Customer, BO Search, Search Role, Search Role

Image: Search Role page (1 of 2)

This example illustrates the fields and controls on the Search Role page (1 of 2). You can find definitions for the fields and controls later on this page.

Search Role

General Options

Description 360 (GBL) Cont of Company

Label Contact of Company

Role Type ID Contact

Relationship Type Contact / Company

Relationship Type 2 Primary Contact / Company

Apply SetID Security

☐ None ☐ Both BOs

☐ Primary BO ☒ Related BO

Apply Application Security

☐ Primary BO ☒ Related BO

Apply Controlling BO

☐ Primary BO ☒ Related BO

Apply Filter BO

☒ Primary BO ☐ Related BO

Filter Record
















Quick Create Template

Maximum Rows 50

Save As

Image: Search Role page (2 of 2)

This example illustrates the fields and controls on the Search Role page (2 of 2). You can find definitions for the fields and controls later on this page.

Used in Search Definitions				
Customize Find View All First 1-3 of 3 Last				
Search Definition				
360 Person (GBL)				
360 BO all details (GBL)				
360 Contact (GBL)				
Field Selection				
Primary Additional 				
Field	Related BO	Search	Result	Transfer to Field Definition
Last Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
First Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Phone	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Email	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Address	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
City	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
State	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Postal	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Country	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Customer ID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

A search role definition associates field definitions to one or more role types. When the user searches for a field, only business objects with a role that is associated with the search role definition are returned in the search results. Each search role definition is associated with a SQL engine and generates a single driver SQL statement and multiple list field SQL statements.

Search role definitions also specify how the search is conducted: security options, relationships to search, how the results are filtered, and the quick create template that is used to create new objects for the role.

General Options

Enter information that describes the role and how it appears.

Relationship Type and Relationship Type 2

Select a relationship type. All relationship types that apply to the role appear in these drop down lists. The one that you select is used to filter the search results.

Apply SetID Security

Select the options that determine how setID security is applied.

If you do not specify a relationship for the role, this field is a check box that you either select or not.

If you specify a relationship for the role, you have the options to apply SetID security to the primary, related, both, or neither business object in the relationship.

Apply Application Security, Apply Controlling BO, and Apply Filter BO

Select the options that determine whether application security, controlling BO, and filter BO are applied to the primary or related business object in the relationship. If you do not specify a relationship, these options are not available.

Filter Record

Enter the name of a record that is used to filter the search results.

Quick Create Template

Enter the name of the quick create template that is used to enter a new object in the event of an unsuccessful search, or that is invoked directly from the BO Search by clicking the pencil icon.

Used in Search Definitions

A list of all search definitions that use the role appears here.

Field Selection

Add fields that the role can search.

Related BO

Select if the field is a field of a related BO.

For example, for the Contact search role, you can check the Company Name field as a related BO because the field belongs to the company record and not the contact record.

Search

Select to use this field as a search criterion.

Result

Select for this field to appear in the search results.

Additional Search Role Options

Access the Field Selection - Additional tab.

Image: Field Selection - Additional tab

This example illustrates the fields and controls on the Field Selection - Additional page. You can find definitions for the fields and controls later on this page.

Field Selection			
Primary Additional ...			
*Field	Search By Role	Search By Rel	
Last Name	<input type="checkbox"/>	<input type="checkbox"/>	-
First Name	<input type="checkbox"/>	<input type="checkbox"/>	-
Name	<input type="checkbox"/>	<input type="checkbox"/>	-
Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-
Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-
Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-
City	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-
State	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-
Postal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-
Country	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-
Customer ID	<input type="checkbox"/>	<input type="checkbox"/>	-

Use this page to override search views defined on the Field Definition - Role page.

Search Page

Use the Search page (RBQ_SRCHDFN) to define a BO search with one or more search roles, search fields, and related BOs.

Navigation

Set Up CRM, Common Definitions, Customer, BO Search, Search, Search

Image: Search page (1 of 2)

This example illustrates the fields and controls on the Search page (1 of 2). You can find definitions for the fields and controls later on this page.

Search

General Options

*Description: The Customer All Details

*Label: Customer

☒ Enable Role Groups

Save As

Search Definition Group Find | View All First 1 of 3 Last

Label: Person

*Control Type: Independent

*Result Display Type: Two column selection

☐ Select Multiple

Quick Create: The Customer with Contact

Role Definition Selection Customize | Find First 1-3 of 3 Last

*Role Definition			
The Contact of Company			+ -
The Contact of Consumer			+ -
The Consumer			+ -

Image: Search page (2 of 2)

This example illustrates the fields and controls on the Search page (2 of 2). You can find definitions for the fields and controls later on this page.

Result Field Selection Customize | Find First 1-12 of 12 Last

Field Definition		Role Type	Related BO	
Last Name			<input type="checkbox"/>	-
First Name			<input type="checkbox"/>	-
Name		Company	<input checked="" type="checkbox"/>	-
Last Name		Individual Consumer	<input checked="" type="checkbox"/>	-
First Name		Individual Consumer	<input checked="" type="checkbox"/>	-
Phone			<input type="checkbox"/>	-
Email			<input type="checkbox"/>	-
Address			<input type="checkbox"/>	-
City			<input type="checkbox"/>	-
State			<input type="checkbox"/>	-
Postal			<input type="checkbox"/>	-
Country			<input type="checkbox"/>	-

Add Field

Enable Role Groups

Select to group the search results by role. For example, the Company, Site, and Alternate Capacity roles are grouped in the Organization group and the Consumer, Contact of

Company, Contact of Consumer, Worker roles are grouped in the Individual group.

Note: The appearance of this page changes when you select this check box. Two additional page regions, Search Definition Group and Field Selection appear.

Search Definition Group

Control Type

Indicate if the role group is *Controlling*, *Independent*, or *Dependent*.

Results appear with the controlling role first, followed by all dependent group records that are associated with the controlling group. For example, this enables users to display organizations first, then all the individuals that are associated with the organization. You can only have one *Controlling* group.

Result Display Type

Indicate whether the results appear in one column or two column format.

Select Multiple

Select to enable the user to choose multiple records from the result set.

Quick Create

Select the quick create definition to associate with the role.

Role Definition

Select one or more roles for the search definition, define their appearance in results, and associate them with quick create definitions.

Role Definition

Select one or more search roles to associate with the search definition.

Result Field Selection

This page region appears when you select Enable Role Groups. If you associate more than one role definition to a search, then you must enter field definitions. This is necessary because two or more roles can use the same field definition. You must indicate to which role the field pertains.

Field Definition

Select the name of the field definition.

Role Type

Select the role type to associate with the field definition. When the system displays results of the BO search, if role groups are enabled, the field appears only in the role group for the role type with which it is associated.

Related BO

Select to indicate that the field is defined on a related BO, not the primary BO that is the target of the search definition.

Criteria Page

Use the Criteria page (RBQ_CRITDFN) to specify the advanced search criteria fields and advanced search definition.

Navigation

Set Up CRM, Common Definitions, Customer, BO Search, Criteria, Criteria

Image: Criteria page (1 of 2)

This example illustrates the fields and controls on the Criteria page (1 of 2). You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Criteria' page with a 'General Options' section. It includes fields for *Description (The Partner), *Label (Partner), *Search Definition (The Partner and Primary), and Search Definition 1 (The Contact of Partner). There are checkboxes for 'Enable Search Filter' (unchecked) and 'Show Search Operators' (checked). At the bottom right are buttons for 'Test BO Search' and 'Save As'.

Image: Criteria page (2 of 2)

This example illustrates the fields and controls on the Criteria page (2 of 2). You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Field Selection' section of the Criteria page. It features a table with columns for *Field Definition, Role Type ID, and Enable Search 1. The table lists fields like Name, First Name, Last Name, City, State, Postal, and Country, each with a corresponding Role Type ID and an 'Enable Search 1' checkbox. Below the table are buttons for 'Add Field' and 'Stamp System Data'. A red message states: 'This object was delivered by PeopleSoft but updated by the customer.' At the bottom is an 'Audit History' section showing a modified date of 05/11/2004 5:44PM PDT by PPLSOFT.

*Field Definition	Role Type ID	Enable Search 1
Name	Partner	<input type="checkbox"/>
First Name		<input checked="" type="checkbox"/>
Last Name		<input checked="" type="checkbox"/>
City		<input type="checkbox"/>
State		<input type="checkbox"/>
Postal		<input type="checkbox"/>
Country		<input type="checkbox"/>

This object was delivered by PeopleSoft but updated by the customer.

Audit History

Modified	05/11/2004 5:44PM PDT	PPLSOFT
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This page captures information about the search definitions to invoke when the user enters certain fields.

Description	Enter the name for the group of criteria that you specify. This name is used to link the criteria to an adapter section.
Search Definition	Enter the default search definition. The definition is used by default when the user searches for a field
Search Definition 1, Search Definition 2, Search Definition 3, Search Definition 4, and Search Definition 5	Enter alternate search definitions. These search definitions appear at runtime. The user can search by the default definition or select an alternate.
Enable Search Filter	Select to have only the search fields that are associated with the selected search definition appear at runtime.
Show Search Operators	Select to have the search operators appear on the BO Search page at runtime.

Field Selection

Use this page region to select fields for a search criteria definition, specify the roles for which the field appears, and select the search definitions for which the field is enabled.

Role Type ID	Select the role to which the field applies, in the case where a field is shared by different roles. For example, if the Name field is shared between the Company and Site roles. To have it appear once as <i>Company Name</i> and once as <i>Site Name</i> , you need to select the Name field twice and associate one to the Company role and one to the Site role.
Enable Search 1, Enable Search 2, Enable Search 3, Enable Search 4, and Enable Search 5	Select to enable the corresponding search definition for the field. For example, if you enable Search 1 and Search 3 for a field, then these search definitions appear in a drop down list at runtime. The user can select a search definition or search by the default definition.

Note: If you select a field for multiple roles, at runtime the field appears once in the search criteria for each role selected. You can specify different field labels for each role to differentiate between multiple occurrences.

Adapter Page

Use the Adapter page (RBQ_ADPTR) to specify the basic search criteria fields.

Navigation

Set Up CRM, Common Definitions, Customer, BO Search, Adapter, Adapter

Image: Adapter page

This example illustrates the fields and controls on the Adapter page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Adapter' page with the following fields and controls:

- General Options:**
 - *Description: CDM Person
 - *Component Name: RD_PERSON
 - *Market: GBL
 - Mapping Reference: (empty)
 - Create Option: (empty)
 - Application Class ID: CDMPerson
 - Toolbar ID: (empty)
 - ☐ Config Search applicable
 - ☐ Trace SQL Statement
- Extension Selection:**

*Extension Event	Section Record Name		
PostComplete	Customer	+	-
PostComplete	Customer FSI	+	-
PostComplete	Company	+	-
PostComplete	Partner_1	+	-

- Component Name** Specify the component to which this adapter definition pertains.
- Market** Select the market to which this adapter definition pertains.
- Mapping Reference** Enter a reference that is used to switch adapters if more than one adapter is needed for a component. This might occur if the same field is used by more than one role.
- Create Option** The Create Option is used to hold an authorization code that determines which users can use quick create.
- Application Class ID** Select the application class where subpages defined by the adapter are defined.
- Toolbar ID** Select the name of the component toolbar where the names of the business objects that are retrieved by BO Search appear.
A component toolbar is used to display common information across all pages in the component.
- Config Search Applicable**
(configurable search applicable) Select to enable configurable search pages for the component to invoke this search definition.

Trace SQL Statement

Select to have the system write the SQL statements that are executed by the search at runtime to a trace log.

Extension Selection**Extension Event**

Select a method from the list that appears.

This list contains the methods of the selected application class. You can use these to write custom code.

Section Record Name

Enter the section to which this extension applies. The list of available sections is taken from the sections that you defined on the Sections page.

Sections Page

Use the Sections page (RBQ_ADPTR_SECT) to define the records and fields that appear on transaction subpages.

Navigation

Set Up CRM, Common Definitions, Customer, BO Search, Adapter, Sections

Image: Sections page (1 of 2)

This example illustrates the fields and controls on the Sections page (1 of 2). You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Sections' page with the following fields and controls:

- Section Selection:**
 - *Description: Ship To Customer
 - *Criteria: CDM Ship To Customer
 - Page Name: (empty)
 - Section Record: RBQ_ADPTR_TMPV1
 - *Section Type: Two column
 - ☐ Enable Search Button
 - Adapter Section Test button
- Field Selection:**
 - *Field: Name
 - Criteria: (empty)
 - Mapping Reference: SHIP_TO_CUSTOMER
 - ☒ BO Assigned
 - ☒ Section Control
- Display Options:**
 - *Display Sequence: 1
 - Display Option: (empty)
 - *Initialized Display: None
 - Identified Display: Hyperlink
 - ☐ Search By Role
 - ☒ Visible Option
 - Identified Label: (empty)

Image: Sections page (2 of 2)

This example illustrates the fields and controls on the Sections page (2 of 2). You can find definitions for the fields and controls later on this page.

▼ Security Options

Primary Object

Related Object

Search Option

ACCACQMGR

Related Section

Role Definition Selection

Customize | Find | | First 1-2 of 2 Last

Role Type	Relationship Type	Apply Security		
Ship To Organization		<input type="checkbox"/>		
Ship To Individual		<input type="checkbox"/>		

Note: Before you configure the transaction adapter for fields, make sure that you have an extensive understanding of system data and transactions.

Section Record	The name of the record that is used as the subpage on the transaction.
Criteria	Select the criteria definition that is used by this section.
Section Type	Select from <i>One Column</i> , <i>Two Column</i> , <i>Hidden</i> , or <i>Custom</i> . If you need to identify a customer in a grid, then specify <i>Custom</i> . <i>Custom</i> sections are used in configurable search pages; other section types are used for customer identification on component and transaction pages.
Page Name	Select the page name that can contain this adapter section. This provides the flexibility to define sections with differing section options, for example, security, in the same adapter.
Enable Search Button	Select to have a Search button appear on the sub page at runtime.
Field Selection	
Field	Enter the name of the field to appear on the transaction.
BO Assigned	Select to indicate that this field is associated to a primary BO on this section.
Section Control	Select to have the field label as defined for this section take precedence over label definitions for the same field as defined for any other section or role. This ensures consistency of the user interface.
Criteria	Select to use a value that is identified for the field as a criteria for additional searches. For example, when a company is identified at runtime, a prompt button with a search for contact appears. When the user clicks

the prompt, the system invokes the search definition that is entered in this field.

Mapping Reference

Enter the logical name of the field on the transaction's component buffer.

Display Options

The entries in this page region control how the section appears to the user at runtime. Different fields appear depending on the Section Type you select.

Search by Role

Select to have the search results displayed by role.

Required Flag

Select to require that the user enter search criteria in the section's fields. This field appears only if you select a Section Type of *Custom*.

The following fields appear only if the Section Type is not *Custom*.

Display Option

Select the functional option that controls security on this field. This is used in conjunction with display templates.

Initialized Display

Select how the field appears when the user first accesses the component. The options in this list control if the field is enterable and if the user can look up field values. For example, the Company Name field on the Case component is enterable but not required.

Identified Display

Select how the field appears when a value is found for the field. For example, if the company name is found, the name appears as a link to the Company component.

Initialized Label

Enter the text for the field label when the user first accesses the component. For example, *Enter a Company Name*.

Identified Label

Enter the text of the field label that appears when the user first accesses the component. For example, *Company Name*.

Security Options

This section is not used.

Role Definition Selection

Select the role and relationship to be secured for the section and check the Apply Security check box. If no security is required then leave the check box empty. If Customer fields require restricted views, then the check box must be selected on both sections.

This page region works in conjunction with the Security Options region, in this way:

The primary and related search objects define the relationship between the two adapter sections and the search options define the authorization code that determines which users are restricted. The Apply Security check box determines to which roles and relationships of the two objects security is applied.

Defining Labels

Use the Labels page (RBQ_ADPTR_LBL) to define labels.

Navigation

Set Up CRM, Common Definitions, Customer, BO Search, Adapter, Labels

Image: Labels page

This example illustrates the fields and controls on the Labels page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Labels' page in a web application. At the top, there are three tabs: 'Adapter', 'Sections', and 'Labels', with 'Labels' being the active tab. Below the tabs is a 'Label Selection' header area containing links for 'Customize', 'Find', and a grid icon. To the right of these links are navigation controls: 'First', '1 of 1', and 'Last'. Below the header is a table with three columns: '*Field', 'Role Type', and '*Label'. Each column has a corresponding input field. The '*Field' and 'Role Type' columns have dropdown menus. The '*Label' column has a text input field. To the right of the text input field are two buttons: a blue '+' button and a grey '-' button.

*Field	Role Type	*Label
<input type="text"/>	<input type="text"/>	<input type="text"/>

Use this page to specify the labels that appear on BO search and quick create pages that are initiated from a transaction subpage. This ensures consistency between labels for fields on customer identification subpages, advanced BO Search pages, and Quick Create pages.

Role Type

Select the role type to which this label applies. If not selected, the label override applies to all roles.

Defining Ad Hoc Business Objects

Understanding Ad Hoc Business Objects

The business object types that the PeopleSoft system delivers are sufficient to process all transactions in the delivered PeopleSoft Customer Relationship Management (PeopleSoft CRM) system. To meet additional business requirements, you can define ad hoc business objects. You define and manage ad hoc business objects in the Business Object component.

Before you can add an ad hoc business object to the system, you must define control values for the object. Ad hoc business objects use the same controls as delivered business objects: business object types, name types, role types, and relationship types.

Note: You use the same pages to define and maintain control information for ad hoc business object that you use to maintain controls for business object types, such as company, site, and person, that are delivered with PeopleSoft CRM.

You can also use the relationship viewer in the Business Object component to maintain names, roles, and relationships for the business objects that you maintain in CRM components (Company, Site, and Person). For example, to add the broker role to a contact, you would search for the contact by name and access the Relationship Viewer page. To create these roles and relationships, you must first set up the appropriate control values and configure a relationship view to recognize this type of relationship.

Related Links

[Understanding Business Object Controls](#)

[Business Object Relationship Modelling](#)

Defining Ad Hoc Business Objects

To define ad hoc business objects, use the Business Object (BO) component.

These topics discuss how to:

- Maintain name information.
- View and maintain ad hoc business object relationships.

Pages Used to Define Ad Hoc Business Objects

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Business Object - Business Object Page	BO	Maintain name information for ad hoc business objects.
Business Object - Relationships Page	BO_REL	View and maintain ad hoc business object relationships.

Related Links

[Understanding the Relationship Viewer](#)

Business Object - Business Object Page

Use the Business Object - Business Object page (BO) to maintain name information for ad hoc business objects.

Navigation

Customers CRM, Business Object, Business Object

Image: Business Object - Business Object page

This example illustrates the fields and controls on the Business Object - Business Object page. You can find definitions for the fields and controls later on this page.

Name Type Displays the business object type.

See [Defining Business Object and Name Types](#).

Business Object - Relationships Page

Use the Business Object - Relationships page (BO_REL) to view and maintain ad hoc business object relationships.

Navigation

Customers CRM, Business Object, Relationships

See [Understanding the Relationship Viewer](#).

Managing Enterprise Integration for PeopleSoft CRM

Understanding Enterprise Integration Technology

These topics discuss:

- EIPs in PeopleSoft CRM.
- PeopleSoft CRM foundation EIPs.
- Application messages.
- Data mapping for application messages.

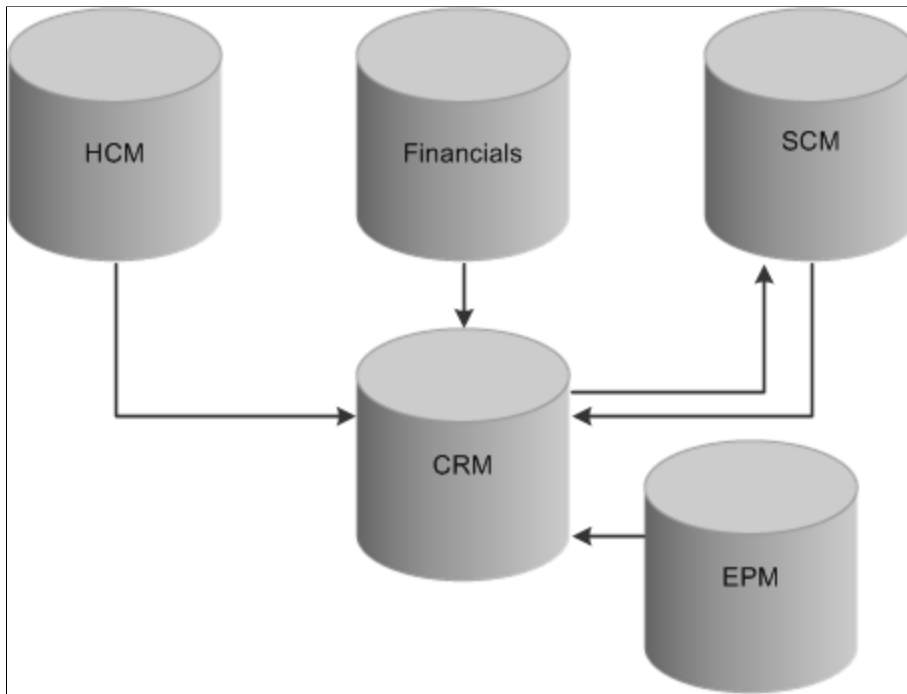
EIPs in PeopleSoft CRM

PeopleSoft CRM applications collaborate to manage and share data across your enterprise—from managing customers and workers to tracking inventory. They use EIPs primarily to integrate with:

- PeopleSoft applications outside of CRM.
- Third-party applications.

Image: Integration between PeopleSoft databases

This diagram illustrates how PeopleSoft CRM works with other PeopleSoft applications to manage and share data across your enterprise:



PeopleSoft CRM integrates with:

- PeopleSoft HCM, which publishes employee and workforce data to the CRM database.
- PeopleSoft Financial Management Solutions and PeopleSoft Supply Chain Management (PeopleSoft SCM) for customer, contact, and product information.

This is a two-way integration.

- PeopleSoft Enterprise Performance Management (PeopleSoft EPM), which publishes the data mining results from Customer Behavior Modeling for use in PeopleSoft CRM.

By taking advantage of the integration technology that PeopleSoft software provides and the existing integrations with PeopleSoft HCM, PeopleSoft Financial Management Solutions, and PeopleSoft SCM, you can integrate with other third-party systems. PeopleSoft CRM achieves integration using Application Messaging, Business Interlinks, and the PeopleTools Integration Broker technology.

PeopleSoft CRM offers many ways of integrating with third-party applications. For example, if you send or publish a message to a third-party system, the system structures the data into a message and automatically delivers it to the destination location. You can also accept or subscribe to messages from third-party systems. The system validates incoming data, checking for errors before updating the system of record.

You can also send a synchronous request or reply transaction to a third-party system for processing and receive a real-time response.

Note: There is no CRM LOCATION_SYNC_EFF, LOCATION_FULLSYNC_EFF, DEPT_SYNC_EFF and DEPT_FULLSYNC_EFF message in CRM. The LOCATION_SYNC, LOCATION_FULLSYNC, DEPT_SYNC, and DEPT_FULLSYNC messages contain both the SYNC and EFF message structures.

See the product documentation for *PeopleTools: PeopleSoft Integration Broker* and *PeopleTools: PeopleSoft Integration Broker Testing Utilities & Tools*.

PeopleSoft CRM Foundation EIPs

This table lists the EIPs that are provided with PeopleSoft software for foundation PeopleSoft CRM:

EIP Name	Description	Message Name	Direction of Integration	Technology
CUSTOMER	Customer information is retrieved to PeopleSoft CRM from other external systems.	CUSTOMER_SYNC CUSTOMER_FULLSYNC_EFF	PeopleSoft CRM ↔ SCM/external system	Application Message
CUSTOMER_COMPANY	Synchronizes company information with other systems.	CUST_COMPANY_FULLSYNC CUST_COMPANY_FULLSYNC_EFF CUST_COMPANY_SYNC CUST_COMPANY_SYNC_EFF	PeopleSoft CRM ↔ SCM/external system	Application Message
CUSTOMER_CONSUMER	Synchronizes consumer information with other systems.	CUST_CONSUMER_FULLSYNC CUST_CONSUMER_FULLSYNC_EFF CUST_CONSUMER_SYNC CUST_CONSUMER_SYNC_EFF	PeopleSoft CRM ↔ SCM/external system	Application Message
CUSTOMER_SITE	Synchronizes site information with other systems.	CUST_SITE_FULLSYNC CUST_SITE_FULLSYNC_EFF CUST_SITE_SYNC CUST_SITE_SYNC_EFF	PeopleSoft CRM ↔ SCM/external system	Application Message

<i>EIP Name</i>	<i>Description</i>	<i>Message Name</i>	<i>Direction of Integration</i>	<i>Technology</i>
WORKER	Synchronizes worker information with other systems.	WORKER_FULLSYNC WORKER_FULLSYNC_EFF WORKER_SYNC WORKER_SYNC_EFF	PeopleSoft CRM –>external system	Application Message
CUSTOMER_CONTACT	Synchronizes contact information with other systems.	CONTACT_SYNC CONTACT_SYNC_EFF CONTACT_FULLSYNC CONTACT_FULLSYNC_EFF	PeopleSoft CRM ↔ SCM/external system	Application Message
BUSINESS UNIT TABLE FS	Synchronizes financial business unit data.	BUS_UNIT_FS_FULLSYNC BUS_UNIT_FS_SYNC	PeopleSoft CRM ↔ SCM	Application Message
TABLE SET CONTROL	Synchronizes setID data.	SETID_INITIALIZE	PeopleSoft CRM ↔ SCM	Application Message
COUNTRY TABLE	Synchronizes country codes and address data to an external system.	COUNTRY_FULLSYNC COUNTRY_SYNC	PeopleSoft CRM ↔ SCM/HCM/External system	Application Message
STATE TABLE	Synchronizes state name, description, and abbreviation information with an external system.	STATE_FULLSYNC STATE_SYNC	PeopleSoft CRM ↔ SCM/HCM/external system	Application Message
UNIT OF MEASURE	Synchronizes units of measure.	UOM_FULLSYNC UOM_SYNC	PeopleSoft SCM/HCM/external system → CRM	Application Message
CURRENCY CODE TABLE	Transmits currency code data.	CURRENCY_FULLSYNC CURRENCY_SYNC	PeopleSoft CRM ↔ SCM/external system	Application Message

<i>EIP Name</i>	<i>Description</i>	<i>Message Name</i>	<i>Direction of Integration</i>	<i>Technology</i>
MARKET RATES DATA	Imports and synchronizes updated market rates.	CURR_QUOTE_MTHD_FULLSYNC CURR_QUOTE_MTHD_SYNC MARKET_RATE_DEFN_FULLSYNC MARKET_RATE_DEFN_SYNC MARKET_RATE_FULLSYNC MARKET_RATE_SYNC MARKET_RATE_LOAD MARKET_RATE_INDEX_FULLSYNC MARKET_RATE_INDEX_SYNC MARKET_RATE_TYPE_FULLSYNC MARKET_RATE_TYPE_SYNC	PeopleSoft CRM ↔ SCM/HCM/external system	Application Message
DEPARTMENT TABLE	Synchronizes departments across the enterprise.	DEPT_FULLSYNC DEPT_SYNC	PeopleSoft CRM ↔ SCM/HCM/external system	Application Message
LOCATION TABLE	Synchronizes location table data across the enterprise.	LOCATION_FULLSYNC LOCATION_SYNC	PeopleSoft CRM ↔ SCM/HCM/external system	Application Message
PRODUCT	Synchronizes product information with PeopleSoft SCM or third-party external systems.	PRODUCT_FULLSYNC PRODUCT_SYNC PRODUCT_GROUP_FULLSYNC PRODUCT_GROUP_SYNC PRODUCT_SYNC_EFF	PeopleSoft CRM ↔ SCM/external system	Integration Broker

EIP Name	Description	Message Name	Direction of Integration	Technology
COMPETENCY TYPE	Receives competency information from PeopleSoft HCM.	CM_TYPE_ FULLSYNC CM_TYPE_SYNC	PeopleSoft CRM ← HCM	Application Message
COMPETENCY TABLE	Receives competency and accomplishment details from PeopleSoft HCM.	COMPETENCY_ FULLSYNC1 COMPETENCY_ SYNC1	PeopleSoft CRM ← HCM	Application Message
PERSON COMPETENCY	Receives a person's competency data from PeopleSoft HCM.	PERSON_ COMPETENCY_ FULLSYNC PERSON_ COMPETENCY_ SYNC	PeopleSoft CRM ← HCM	Application Message
RATING MODEL	Receives rating model data from PeopleSoft HCM.	RATING_MODEL_ FULLSYNC RATING_MODEL_ SYNC	PeopleSoft CRM ← HCM	Application Message
PERSONAL DATA	Synchronizes personal data from PeopleSoft HCM.	PERSON_BASIC_ FULLSYNC PERSON_BASIC_ SYNC	PeopleSoft CRM ← HCM	Application Message
WORKFORCE DATA	Synchronizes workforce data from PeopleSoft HCM.	WORKFORCE_ FULLSYNC WORKFORCE_SYNC	PeopleSoft CRM ← HCM	Application Message
PERSON OF INTEREST DATA	Synchronizes persons of interest (POIs) that do not have a job record from PeopleSoft HCM. POIs with a job record are synchronized in the WORKFORCE DATA EIP.	PERS_POI SYNC	PeopleSoft CRM ← HCM	Application Message
CALENDAR/TASK	Fully synchronizes the calendar with Outlook, Lotus Notes, or other personal information manager (PIM).	PIM_CONTACT_ SYNC	PeopleSoft CRM ↔ Outlook/PIM	Application Message
CUSTOMER GROUP	Synchronizes customer groups.	CUSTOMER_GROUP_ FULLSYNC CUSTOMER_GROUP_ SYNC	PeopleSoft CRM ↔ SCM	Application Message

<i>EIP Name</i>	<i>Description</i>	<i>Message Name</i>	<i>Direction of Integration</i>	<i>Technology</i>
REPRESENTATIVE	Synchronizes representative data with PIM.	PIM_CONTACT_SYNC REP_SYNC	PeopleSoft CRM ↔ Personal Information Manager (PIM)	Application Message
PS GETID	Retrieves customer IDs and contact IDs from other PeopleSoft systems.	PSGETID	PeopleSoft CRM ↔ SCM	XML link
GET CUSTOMER VALUE	Retrieves customer value/KPI information from PeopleSoft EPM and updates the BC (Business Contact) and the RB_CLAF_EPM_KIP (Key Performance Indicator) tables in the PeopleSoft CRM database.	KP_KPI_ASMT_FACTS	PeopleSoft CRM ↔ EPM	Application Message
GET BILLS FOR 360 DEGREE VIEW	<ul style="list-style-type: none"> Requests billing information (bills) from PeopleSoft Billing to display in the 360-Degree View. PeopleSoft Billing responds with the billing information that is requested from the PeopleSoft CRM 360-Degree View. 	<ul style="list-style-type: none"> BI_EIP360_REQ BI_EIP360_RSP 	<ul style="list-style-type: none"> PeopleSoft CRM ↔ SCM PeopleSoft CRM ↔ SCM 	<ul style="list-style-type: none"> Application Message Application Message
GET ACCOUNT RECEIVABLES FOR 360 DEGREE VIEW	<ul style="list-style-type: none"> Requests payment information (payments) from PeopleSoft Receivables to display in the 360-Degree View. PeopleSoft Receivables responds with the payment information that is requested from the PeopleSoft CRM 360-Degree View. 	<ul style="list-style-type: none"> AR_CRM_REQUEST AR_CRM_RESPONSE 	<ul style="list-style-type: none"> PeopleSoft CRM ↔ Financial Management Solutions PeopleSoft CRM ↔ Financial Management Solutions 	<ul style="list-style-type: none"> Application Message Application Message

EIP Name	Description	Message Name	Direction of Integration	Technology
QUICK CODE	Synchronizes quick codes from CRM to HCM for use in building AAF policies.	<ul style="list-style-type: none"> HD_QUICK_CODE_FULLSYNC HD_QUICK_CODE_SYNC 	PeopleSoft Enterprise CRM -> HCM system	Application Message
CREATE CASE	Synchronizes case-related information from HCM to CRM to create HR HelpDesk cases	HD_HRHD_CASE	PeopleSoft Enterprise HCM -> CRM system	Application Message

EIPs that support particular business processes and applications are addressed in other PeopleSoft CRM documentation. The online EIP Catalog database lists, with technical details, the EIPs that PeopleSoft CRM uses.

Related Links

"Understanding Fulfillment Integration" (PeopleSoft CRM 9.2: Order Capture Applications)

"Integrating with PeopleSoft Financial Management Services" (PeopleSoft CRM 9.2: Integrated FieldService)

"Integrating with PeopleSoft Human Capital Management" (PeopleSoft CRM 9.2: Integrated FieldService)

"Integrating with PeopleSoft SCM" (PeopleSoft CRM 9.2: Integrated FieldService)

Application Messages

EIPs that publish data to another database are available as both FULLSYNC and SYNC messages. FULLSYNC messages are designed for use at implementation time for setup information. Once a table has been set up, the SYNC messages allow for updates to that data.

Important! Some FULLSYNC messages are designed to fully replace the data through the use of the header message. To avoid losing existing data, turn off the header—the message refreshes the data by updating the existing data and adding any missing data.

Application Message Setup

As delivered, PeopleSoft EIP application messages are inactive.

To set up a delivered application message:

1. Activate the application message.
2. For inbound messages, activate the message subscription PeopleCode.
3. Set the associated message channel to Run mode.
4. Configure an existing message node or define a new message node.
5. Define asynchronous or synchronous transactions on the message node.

- Define relationships to reconcile transaction parameters for routing, transmission type, message structure, or message content, if necessary.

See *PeopleTools: PeopleSoft Integration Broker*.

Data Mapping for Application Messages

PeopleSoft CRM has the capability of subscribing to other PeopleSoft-application or third-party-application messages. Before PeopleSoft CRM can subscribe to a PeopleSoft EPM message or any third-party message, data mapping must occur between the source format and the destination format. To accommodate this data mapping, PeopleSoft CRM created a Data Mapping component. Using this component, you can perform data mapping for any single-level hierarchical message.

The integration between PeopleSoft EPM and CRM is currently the one place that uses this data mapping component. Before PeopleSoft CRM can receive key performance indicator (KPI) information through the KP_KPI_ASMT_FACTS application message from EPM, the application message data must be mapped to data fields that the CRM system recognizes. To assist with this integration, PeopleSoft provides a predefined data mapping structure sample.

Alternatively, data is inserted into RB_CLAF_EPM_KPI table via the KP_KPI_EPM terms subscription. This subscription creates terms for the Active Analytics Framework.

This table shows the predefined data mapping structure sample provided with PeopleSoft software to assist with integration between PeopleSoft CRM and EPM:

Message Name	Record to Update	Fields to Update Field/XML Tag	Record Identification Field/XML Tag	Message Row Identification XML Tag Name/XML Tag Value
KP_KPI_ASMT_FACTS	BC	<ul style="list-style-type: none"> ASSESS_DESCR/ ASSESSS DESCR ASSESS_ID/ ASSESS_ID ASSESS_IMAGE_ID/ ASSESS_IMAGE_ID KPI_ID/KPI_ID PCT_OF_TARGET/ PCT_OF_TARGET RESOLVED_VALUE/ RESOLVED_VALUE 	CUST_ID/OBJ_ID	PF_OBJECT_TYPE/ CUSTOMER MASTER

Related Links

[Defining Company Information](#)

[Defining Person Information](#)

Mapping Message Data to PeopleSoft CRM Records and Fields

Integration with PeopleSoft HCM, PeopleSoft Campus Solutions or Third-Party HR Data

These topics discuss:

- Person Basic Fullsync and Person Basic Sync.
- Workforce Fullsync and Workforce Sync.
- Campus Solutions EIPs.
- Pers POI Sync.
- Customer Data Model EIP.
- Implementation using Fullsyncs.

PeopleSoft CRM employs a number of EIPs to integrate the CRM Customer Data Model (CDM) with PeopleSoft HCM, PeopleSoft Campus Solutions, or another third-party system. The interdependent nature of these EIPs makes it very important that they are used correctly and in the proper sequence to ensure data quality.

Person Basic Fullsync and Person Basic Sync

The Person Basic EIPs form the foundation of the CDM integrations. They are responsible for creating the Person object that is the building block of the CDM. Additional duties include the populating and updating of personal biographical data, National ID, and names. Finally, all creation and maintenance of contact methods (address, email, phone) are processed through the Person Basic EIPs.

Person Basic Fullsync versus Person Basic Sync

Person Basic Fullsync is designed as an initial load program to be used during system implementation to create new persons in the CDM. While it is possible to run Person Basic Fullsync more than once, it will not perform updates on existing person data or contact methods. Any existing person found in the fullsync message is skipped and written to a log file for review.

Once Person Basic Fullsync has been used for initial customer population creation, it should be deactivated and the incremental Person Basic Sync message activated. Person Basic Sync handles the creation of persons going forward as well as any subsequent updates to personal biographical data, National ID, names, and contact methods.

Search Match

Search Match is a utility that validates whether a new person being added to the CDM via an import or EIP actually already exists in CRM in order to avoid data duplication. The matching is based on a set of predefined criteria set in the Search Match configuration. Person Basic Sync is compatible with Search Match and, if enabled, will perform the matching function. Person Basic Fullsync, however, is not compatible with Search Match.

See "Using Search/Match with PERSON_BASIC_SYNC" (PeopleSoft CRM for Higher Education 9.2).

Contact Methods and Person Start Date

When the Person Basic EIPs create a new Person object, the new person is given the default *Individual* role type. It is important for data integrity that any contact methods created for the person do not have a start date that is earlier than the start date of the individual role. The possibility of this issue often arises in instances of a legacy data conversion where an extensive history of person data is being loaded into CRM for the first time. To handle this scenario, a comparison algorithm is performed using the inbound data so that the start date of the person object is set to the earliest of these three dates: the effective date of the PERSON_DATA_EFFDT record, the original hire date, and the earliest contact method effective date.

Example:

<i>Person_Data_Effdt.Effdt</i>	<i>Person_Data_Effdt.Orig_Hire_Dt</i>	<i>Earliest Contact Method Effdt</i>	<i>Person Object, Individual Role Start Date</i>
6/20/2010	5/01/2010	5/02/2010	05/01/2010
6/20/2010	Null	04/01/2010	04/01/2010
6/20/2010	6/15/2010	07/01/2010	06/15/2010

Note: The audit *Date Stamp* on the CDM entry will reflect the day and time that the Person Basic message is processed by CRM and the record is added to the database. The *Date Stamp* may not match the *Person Role Start Date* if the *Person Role Start Date* is adjusted as in the above examples. This may also occur if there is an extended processing delay between the time the message is published from HCM and ultimately received and processed by CRM.


Adding Contact Methods Across Roles

Person Basic EIPs provide only the *Individual* role when a person is created. Additional roles such as *Worker* or *Consumer* are added to persons later by the other CDM EIPs that rely on the Person object having already been created. Despite this, Person Basic Sync is responsible for the subsequent contact method maintenance across all roles held by the person.

When Person Basic Sync receives a request to add a new contact method of a particular contact method type (address, email, phone) for an existing person, it uses the configuration on the Contact Method Type definition to determine which roles the contact method will be added to if they exist for the person. Available roles are *Individual Consumer*, *Worker*, and *POI* (person of interest).

Image: Person Basic Sync Setting section of the Contact Method Type page

This example illustrates the Contact Method Type page.

Relationships				
Customize View All  First 1-10 of 12 Last				
*Priority	Relationship Type ID			
3	Primary Contact / Company		+	-
6	Contact / Company		+	-
5	Primary Contact / Site		+	-
7	Contact / Site		+	-
4	Primary Contact / Consumer		+	-
8	Contact / Consumer		+	-
1	Primary Contact / Partner		+	-
11	Contact / Partner		+	-
10	Contact / Partnership		+	-
4	Primary Contact / Partnership		+	-

Person Basic Sync Setting	
Role Type ID	Add Contact Methods
Worker	<input type="checkbox"/>
Individual Consumer	<input checked="" type="checkbox"/>
Person of Interest	<input type="checkbox"/>

This object was delivered by PeopleSoft but updated by the customer.

Modified	12/06/2010 2:35PM PST	VP1
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When a new contact method is created, it cannot have a start date that predates the established role to which it is to be associated. The start date of the contact method will be adjusted accordingly upon creation if necessary. This table lists several examples:

Person Basic Sync Run Date	Inbound Contact Method Start Date	Role Exists?	Role Start Date	Resulting Contact Method Start Date
5/30/2010	5/01/2010	Yes	1/1/2010	5/01/2010

Person Basic Sync Run Date	Inbound Contact Method Start Date	Role Exists?	Role Start Date	Resulting Contact Method Start Date
5/30/2010	5/01/2010	Yes	5/15/2010	5/15/2010
5/30/2010	5/01/2010	No	5/30/2010	5/30/2010
5/30/2010	7/01/2010	Yes	1/1/2010	7/01/2010

Note: Contact methods that are entered manually into CRM are not maintained by Person Basic Sync.

See [Contact Method Type Page](#).

Person Basic Message Logging

During Person Basic EIP processing, some informational messages will be written to the message log. It happens, for example, when existing persons are skipped by Person Basic Fullsync or when there are issues with the Search Match configuration issues that need to be addressed. Additionally, the log can be used to debug integration issues should a Person Basic message go to error status. Users can access the log file after a run is completed through the Service Operations Monitor under this navigation: PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Asynchronous Services.

Select the completed PBS or PBS_FS message details.

Select the Error Messages link and the log will be displayed.

Workforce Fullsync and Workforce Sync

The Workforce EIPs are another important part of the CDM EIP structure. They are responsible for importing job and employment data for persons from PeopleSoft HCM or PeopleSoft Campus Solutions into CRM. Workforce is dependent on the Person Basic EIPs having already created the Person object for which the job and employment data is being synchronized. Workforce Fullsync is for initial load of job data and the incremental Workforce Sync handles updates and additions going forward.

Besides importing POI data, Workforce EIPs affect the CDM in two ways. First, they create the *Worker* role for the Person object if it does not already exist. Second, when the *Worker* role is added, any existing contact methods for that person are cloned and added to the *Worker* role. This is the only contact method interaction for Workforce EIPs; all subsequent changes or additions are processed through Person Basic Sync.

For import of employee job data from non-PeopleSoft third-party systems, the Worker Sync EIP is used.

Job Code Data

PeopleSoft CRM subscribes to all job information for worker and for POI. All fields (except for Physical Location) in the Worker component are updated from PeopleSoft HCM.

Related Links

[Worker Data Integration with Third-Party Systems](#)

Campus Solutions EIPs

PeopleSoft Campus Solutions maintains multiple EIP integrations with CRM to add and maintain student and prospective student data. Not all of these EIPs interact with the CDM, though a select few do (see the *CDM Message Summary* session below). These messages are dependent on the Person Basic EIPs having already created the Person object for which the data is being synchronized.

The Campus Solutions EIPs create the *Consumer* role for the Person object if it does not already exist. Also, when the *Consumer* role is added, any existing contact methods for that person are cloned and added to the Consumer Role. This is the only contact method interaction for Campus Solutions EIPs; all subsequent changes or additions are processed through Person Basic Sync.

Related Links

PeopleSoft CRM for Higher Education

Pers POI Sync

The Pers POI EIP is an important part of the CDM EIP structure. It is responsible for importing POI data for persons from PeopleSoft HCM or PeopleSoft Campus Solutions into CRM. Pers POI Sync is dependent on the Person Basic EIPs having already created the Person object for which the data is being synced.

Pers POI Sync creates the *POI* role for the Person object if it does not already exist. Also, when the *POI* role is added, any existing contact methods for that person are cloned and added to the *POI* role. This is the only contact method interaction for Pers POI Sync; all subsequent changes or additions are processed through Person Basic Sync.

Customer Data Model EIP Sequence

Due to the interdependent nature of the EIPs which are creating and modifying CDM information, it is vital that CRM receives and processes them in the correct order. Because the Person Basic EIPs create the foundation Person object, those messages must always be received and processed before subsequent Workforce or Campus EIPs for that same person. Failure to do so can result in data loss, inconsistent data between the CRM and the source system, or both.

To ensure that the messages are received and processed in the correct order, the EIPs are delivered in a single ordered message queue. Messages should not be removed from this queue.

CDM Message Summary

This table lists the delivered CDM messages:

Message Name	Publishing Product(s)	Creates Role	Message Queue
PERSON_BASIC_SYNC	PeopleSoft HCM or Third-Party	1 – Individual	PERSON_DATA
PERSON_BASIC_FULLSYNC	PeopleSoft HCM or Third-Party	1 – Individual	PERSON_DATA
WORKFORCE_SYNC	PeopleSoft HCM	4 – Worker	PERSON_DATA

Message Name	Publishing Product(s)	Creates Role	Message Queue
WORKFORCE_FULLSYNC	PeopleSoft HCM	4 – Worker	PERSON_DATA
PERS_POI_SYNC	PeopleSoft HCM	88 – Person of Interest	PERSON_DATA
CS_TESTSCORES_FULLSYNC	PeopleSoft Campus Solutions	9 - Consumer	PERSON_DATA
CS_ADM_APPL_DATA_FULLSYNC	PeopleSoft Campus Solutions	9 – Consumer	PERSON_DATA
CS_ADM_PRSPCT_DATA_FULLSYNC	PeopleSoft Campus Solutions	9 - Consumer	PERSON_DATA
SAD_ADM_APPL_DATA_SYNC	PeopleSoft Campus Solutions	9 - Consumer	PERSON_DATA
SAD_ADM_PRSPCT_DATA_SYNC	PeopleSoft Campus Solutions	9 - Consumer	PERSON_DATA
SAD_TEST_SCORES_SYNC	PeopleSoft Campus Solutions	9 - Consumer	PERSON_DATA
RC_EBS_PERSON_INC_SERVICE	Oracle E-Business Suite	1 – Individual	PERSON_DATA
RC_EBS_WORKFORCE_INC_SERVICE	Oracle E-Business Suite	4 – Worker	PERSON_DATA

Implementation Using Fullsyncs

You should perform FULLSYNC messages at implementation time to set up your PeopleSoft CRM database correctly.

To set up your database with FULLSYNC messages (recommended sequence):

1. Before you run the main EIPs, run these common EIPs:
 - a. Country
 - b. State
 - c. Currency
 - d. SetID Initialization
 - e. Table Set Control Initialization
 - f. Location
 - g. Business Unit

2. Run the Person Basic Sync EIP.
3. Run the Workforce EIP group.
 - a. Department
 - b. Job Code
 - c. Workforce
4. Run the Person Competencies EIP group.
 - a. CM_TYPE
 - b. Rating Model
 - c. Competency
 - d. Person Competency
5. Inactivate the FULLSYNC messages and activate the corresponding SYNC messages.

SYNC messages always originate in PeopleSoft HCM or a third-party system and publish to PeopleSoft CRM. Thus, any field in PeopleSoft CRM that an EIP populates must be maintained from the originating source database, whether it is PeopleSoft HCM or a third-party system.

Note: If you create workers within PeopleSoft CRM, you must maintain these workers in CRM until you create them in an HR or third-party database.

Data Integrations

These topics discuss:

- Customer and contact data integration with PeopleSoft FSCM.
- Worker data integration with third-party systems.
- Product data integration.
- Bill and payment data integration.
- Other integration considerations.

Customer and Contact Data Integration with PeopleSoft FSCM

In PeopleSoft CRM, a *customer* can be either a company, a consumer, or a site that is associated with a company or consumer. A *contact* is any person who performs transactions on a customer's behalf.

Company, Consumer, Site, and Contact EIPs

Use the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, and CUSTOMER_SITE EIPs to synchronize customer information with other systems. When you implement these EIPs, application

messages are published whenever a company, consumer, or site record in the PeopleSoft CRM system is added or modified. PeopleSoft CRM can also subscribe to these EIP application messages that are published when these records are modified in another system.

Note: CRM cannot publish a company with grandparent companies to SCM, because SCM only supports a two-level customer hierarchy, whereas CRM can support multi-level customer hierarchies. If you have implemented the CUSTOMER_COMPANY EIP and a company with grandparent companies is added in the Company component, this online message is issued:

SCM doesn't allow multi-level customer hierarchy, No message will be published

The CUSTOMER_CONTACT EIP enables you to synchronize customer contact information with another system. When you implement the CUSTOMER_CONTACT EIP, application messages are published when a contact record in the PeopleSoft CRM system is added or modified. CRM can also subscribe to CUSTOMER_CONTACT EIP application messages that are published when these records are modified in another system.

Important! You must market-enable the Company, Consumer, Site, and Contact EIPs before PeopleSoft CRM can send customer (company, consumer, and site) and contact data to other databases. Market-enabling enables you to specify what data the PeopleSoft CRM system sends to other systems for a specific market. For example, you might opt not to publish certain customer and contact data to an external system for the FSI market. At the minimum, you must specify a global market to interface all non-market specific data.

See [Market-Enabling Company, Consumer, Site, and Contact EIPs](#).

Site Considerations

Only CRM sites that are flagged with the bill-to or sold- to purchasing options are integrated as customers with PeopleSoft SCM. If a site is flagged as Ship To only then the site is integrated with PeopleSoft SCM as an address to the company with which the site is associated.

When you add the bill-to or sold-to flag to a ship-to site, the system publishes the site message to create a new customer in PeopleSoft SCM. However, if a customer already exists in PeopleSoft SCM, removing the bill-to and sold-to options from the site does not remove the customer information for that site in PeopleSoft SCM.

Specifying Customer ID and Contact ID Default Values

You must specify the system that owns the customer ID and contact ID and verify the automatic numbering for ID generation for each setID.

See [Understanding Enterprise Integration Technology](#).

Customer and Contact Integration with Other PeopleSoft Applications

Unlike PeopleSoft CRM, PeopleSoft Financial Management Solutions and PeopleSoft SCM do not distinguish between company, consumer, and site records. CUSTOMER_COMPANY, CUSTOMER_CONSUMER, and CUSTOMER_SITE EIP application messages to which these systems subscribe are all mapped to customer records with unique customer IDs in the PeopleSoft Financial Management Solutions and PeopleSoft SCM systems.

When customer records are added or modified in PeopleSoft Financial Management Solutions and PeopleSoft SCM, the system publishes application messages using the Customer EIP. These messages are mapped to companies in the PeopleSoft CRM system.

When a record that is created in PeopleSoft CRM is modified in PeopleSoft Financial Management Solutions and PeopleSoft SCM, the system uses the record key information (customer ID and setID) that is included in the application message that's reporting the change to derive the record's original business object ID in PeopleSoft CRM. This enables CRM to apply the changes that are reported in the application message to the corresponding company, consumer, or site record.

To ensure uniqueness of customer ID and contact ID between multiple PeopleSoft CRM databases, you must specify the system that owns the customer ID and contact ID and verify the automatic numbering for ID generation for each setID.

See [Establishing Master ID Databases](#).

Note: The CUSTOMER_COMPANY, CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and CUSTOMER_SITE EIPs enable you to maintain customer information in multiple databases. However, to simplify integration of customer information, choose one database as the system of record for customer maintenance, and use PeopleTools Applications Portal technology to support customer information inquiries from the other systems. If you maintain customer and contact information in multiple databases, you must consider additional design, planning, and integration steps.

Customer and Contact EIP Application Messages Processing Order

In PeopleSoft CRM, because contacts can be associated with a company, consumer, or site, the company, consumer, or site record should be created before the contact record. When you implement the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and CUSTOMER_SITE EIPs, make sure that the application messages from the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, and CUSTOMER_SITE EIPs are processed before application messages from the CUSTOMER_CONTACT EIP when performing a FULLSYNC process.

Maintaining Customer and Contact Information in Different Databases

In PeopleSoft, customers exist in PeopleSoft CRM, PeopleSoft SCM, and PeopleSoft Financial Management Solutions. There are a number of ways to design the system to integrate between PeopleSoft CRM, PeopleSoft SCM, and PeopleSoft Financial Management Solutions. The simplest way to integrate customer master information is to manage all customer maintenance out of one database and support inquiry only on the other databases. Then you can use PeopleTools Applications Portal technology to access either system.

You might have a compelling business reason to maintain customer and contact information in different databases. For example, you may elect to have your front office users create customers in the PeopleSoft CRM database but want to use the Receivables payment processing options that are available only in Financial Management Solutions.

If you choose to maintain customer (company, consumer, and site) and contact information in different databases, you must:

- Define which database owns the customer and contact ID number assignment on the Master ID DB Setup page.

By specifying an owner, the system will be consistent in assigning a unique customer or contact ID for a particular customer or contact across different databases.

- Set up defaulting for the CRM Name Type field on the Name Type Defaults page.

You cannot add new contacts or customers to the PeopleSoft CRM database through the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and CUSTOMER_SITE EIPs unless you complete this step.

- Set up at least one PeopleSoft CRM market control code for interfacing CRM customer and contact data to other databases.
- Evaluate whether you plan to define customers as bill-to customers in PeopleSoft CRM.

In PeopleSoft SCM and PeopleSoft Financial Management Solutions, customers that you define as bill-to customers must also have a defined collector and credit analyst. To ensure that PeopleSoft CRM passes these required fields to PeopleSoft SCM and PeopleSoft Financial Management Solutions, select the Collector/Credit Analyst Req (collector/credit analyst required) check box on the Installation Setup table. This ensures that PeopleSoft CRM satisfies the required field edit that is needed to populate PeopleSoft Financial Management Solutions and PeopleSoft SCM. Set up defaulting of these values on the Interface Defaults page under Define Integration Rules.

- Manually keep the Collector and Credit Analyst table in PeopleSoft CRM in sync with the PeopleSoft Financial Management Solutions and PeopleSoft SCM Collector and Credit Analyst table.
- Establish a default support team code in PeopleSoft CRM for each setID to be used in when creating a customer.

In PeopleSoft SCM and PeopleSoft Financial Management Solutions, a default support team code is required for each customer. To satisfy the required field edit, PeopleSoft CRM enables you to set up a default value on the Interface Defaults page under Define Integration Rules. In addition, ensure that the value set up on the Default page also exists on the PeopleSoft SCM and PeopleSoft Financial Management Solutions system.

PeopleSoft FSCM Customer-Related Pages That Are Unavailable in PeopleSoft CRM

These pages in the PeopleSoft SCM or PeopleSoft Financial Management Solutions Customer component are not available in CRM:

- Vendor Info.
- Credit Profile - General.
- Credit Profile - Credit Check.
- Region Code Info.
- Subcustomer Info.
- Customer Group Info.
- Customer VAT Info (customer value-added tax information).
- Customer Notes Info.
- Attachments.
- Messages.

- User-Defined 1.
- User-Defined 2.
- Payment Options.
- Write-Off Info.
- Hierarchy.
- Product Catalog.
- Product Aliases.
- Additional Ship To Options.
- Ship Exception Dates.
- Carrier Acct Number (carrier account number).

Note: If the PeopleSoft CRM installation is integrated with either PeopleSoft SCM or PeopleSoft Financial Management Solutions, you can access these pages through those applications.

The Products component in PeopleSoft SCM and PeopleSoft Financial Management Solutions uses these customer components, which are not available in CRM:

- Dun & Bradstreet.
- MICR Information.
- Corporate Customer Tree.
- Vendor Information.
- Corporate Tree Messages.
- Customer EFT Name (customer electronic funds transfer name).
- Quick Customer Create.

Note: You can access these pages through PeopleSoft SCM or PeopleSoft Financial Management Solutions if the PeopleSoft CRM installation is integrated with those systems.

See the documentation for *PeopleSoft: Enterprise Components*.

Related Links

[Defining Consumer Information](#)

[Understanding Purchasing Options](#)

Worker Data Integration with Third-Party Systems

Use the Worker EIP to synchronize worker information with another system. In PeopleSoft CRM, workers are people who work for you. When you implement the Worker EIP, application messages are published when a worker record in the PeopleSoft CRM system is added or modified. PeopleSoft

CRM can also subscribe to Worker EIP application messages that are published when these records are modified in another system. The Worker EIP enables PeopleSoft CRM to accept and create future dated workers that were created in another system and to which CRM subscribed.

Product Data Integration

Integrate product data using the PeopleTools Integration Broker. This technology enables both synchronous and asynchronous messages to be transmitted using one technology. The PRODUCT_SYNC and PRODUCT_FULLSYNC messages are used to both publish and subscribe to data between PeopleSoft CRM and PeopleSoft SCM or a third-party system.

Integrating from PeopleSoft SCM to PeopleSoft CRM

PeopleSoft CRM subscribes asynchronously to the PRODUCT_SYNC message that is coming from PeopleSoft SCM. This data is processed directly into the PeopleSoft CRM product tables using Component Interfaces (CIs).

A product package header record is added for any kit components that are received from PeopleSoft SCM.

Integrating from PeopleSoft CRM to PeopleSoft SCM

PeopleSoft CRM publishes the PRODUCT_SYNC message whenever product data is added, changed, or deleted through the Product Definition (PROD_DEFN), Product Package (PRODKIT_SUMMARY), Pricing (PROD_PRICE), Package Pricing (PRODKIT_COMPS_PRICE), Notes (PROD_NOTE), Relationships (PROD_RELATIONS_CMP), and Product Attributes by UOM (product attributes by unit of measure; PROD_UOM) pages.

The Integration Broker processes the message and applies a transformation to remove the PRODKIT_HEADER.

Any package components that are themselves packages are also stripped from the message.

Because PeopleSoft SCM does not allow packages within packages, package components that are themselves packages are also stripped from the message.

This table shows how an order represents packages to PeopleSoft SCM:

Type	Line Display	Line Data Model/EIP
0-Static Package (1-level static quantity) PROD_ITEM.PROD_KIT=Y PROD_KIT_HEADER.LT_CONFIG_FLAG=N	Display all components of the package as multiple lines.	Store and publish parent line.

Type	Line Display	Line Data Model/EIP
1-Package (Kit) (multilevel dynamic quantity) PROT_ITEM.PROD_KIT=Y PROD_KIT_HEADER.LT_CONFIG_FLAG=Y	Display all components of the package as multiple lines.	Store all components as multiple lines, and publish as multiple lines.
2-Configured Package(Kit) PROD_ITEM.PROD_KIT=Y PROD_ITEM.CFG_KIT=Y	Display all components of the package as multiple lines.	Store all components as multiple lines, and publish as multiple lines.
3-Configured Product MASTER_ITEM_TBL.DIST_CFG_FLG=Y	Display high level parent line.	Store and publish parent line plus configuration.

Integrating from PeopleSoft CRM to a third-party SCM database

PeopleSoft CRM publishes the PRODUCT_SYNC message whenever product data is added, changed, or deleted through the Product Definition, Product Package, Pricing, Package Pricing, Notes, Relationships, and Product Attributes by UOM components. Integration Broker passes the message to the subscribing system.

Bill and Payment Data Integration

PeopleSoft CRM integrates with Billing and Receivables to obtain billing information—invoices—and payments that are associated with a company, consumer, or contact. If a person is a contact of a company and that role is selected in the Role field in 360-Degree View, then the 360-Degree View EIPs retrieve invoices and payments for the company and not for the contact.

The PeopleSoft CRM 360-Degree View can display invoices and payments under those nodes in the 360-Degree View tree. When you define these types of nodes on the Define Node page in PeopleSoft CRM, you specify all of the necessary EIP details that are associated with that node.

To request invoices from PeopleSoft Billing, and for Billing to respond to the request, use the GET BILLS FOR 360 DEGREE VIEW EIP. This EIP consists of two application messages:

- BI_EIP360_REQ (request message)
- BI_EIP360_RSP (response message)

To request payments from PeopleSoft Receivables and for Receivables to respond to the request, use the GET ACCOUNT RECEIVABLES FOR 360 DEGREE VIEW EIP. This EIP consists of two application messages:

- AR_CRM_REQUEST (request message)
- AR_CRM_RESPONSE (response message)

All of the application messages that are used for integrating with 360-Degree View are synchronous.

PeopleSoft CRM passes the request parameters for the request application message using an application class method. This table lists the application classes that PeopleSoft CRM uses to pass the request parameters to Billing and Receivables:

<i>PeopleSoft Application</i>	<i>Class ID</i>	<i>Class Path</i>	<i>Method Name</i>
PeopleSoft Billing	EIP	RB_TD_360	PopulateBillRequestMsg
PeopleSoft Receivables	EIP	RB_TD_360	PopulatePaymentRequestMsg

Performance Considerations

When you integrate large amounts of data with other systems, system performance is slowed. The following tips might help.

Data Maintenance in Multiple Systems

If you have both PeopleSoft CRM and PeopleSoft SCM databases, PeopleSoft recommends that you:

- Synchronize tables (such as Customer and Contacts) by running the FULLSYNC EIPs to perform a full batch publish to the subscribing system.

Note: In general, FULLSYNC messages first delete all existing data in the target record and then load a copy of the source record. For Company, Consumer, Contact, and Site FULLSYNC messages that come into PeopleSoft CRM, no delete occurs; the data is merged into the existing data instead. This ensures data integrity within the PeopleSoft CRM system.

- Update databases in the subscribing system by running SYNC EIPs to perform incremental updates.

SYNC messages modify, delete, or add only the data that a user affected while performing an individual transaction.

Cascading Addresses

You can set a system option that automatically updates addresses on related business objects whenever you update an address on a parent business object. When you enable this option, each update that occurs also triggers an EIP to publish the address change to PeopleSoft SCM.

See [Maintaining Contact Information for Business Objects](#).

Related Links

[Establishing Master ID Databases](#)

[Setting Up Defaults for Integrating Customer and Contact Information](#)

[Market-Enabling Company, Consumer, Site, and Contact EIPs](#)

Setting Up Defaults for Integrating Customer and Contact Information

To set up defaults for integrating customer and contact information, use the Collector (COLLECTOR_TABLE), Credit Analyst (CR_ANALYST_TABLE), and General Options (RB_INSTALLATION) components.

These topics discuss how to define default values for integrating customer and contact information.

Pages Used to Set Up Default Values for Integrating Customer and Contact Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Collector Page	COLLECTOR_TABLE	Create and maintain collector codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.
Credit Analyst Page	CR_ANALYST_TABLE	Create and maintain credit analyst codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.
Support Team Code Page	TEAM_CODE_TBL	Create and maintain support team codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.
Interface Defaults Page	RB_EIP_DEFAULTS	Specify default values on customer records for fields that are required for integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM.
Name Type Options Page	RB_NM_TYPE_DFLT	Specify default name type values to use on company and contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM.
General Options Page	RB_INSTALLATION	Specify default exchange rate codes to use on company and contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM and ensure that required codes are available to the EIP.

Collector Page

Use the Collector page (COLLECTOR_TABLE) to create and maintain collector codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.

Navigation

Set Up CRM, Common Definitions, Customer, Collector

Important! To ensure successful integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM, you must synchronize collector codes manually between PeopleSoft CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP application messages that include codes that are not available in the subscribing system will fail.

Credit Analyst Page

Use the Credit Analyst page (CR_ANALYST_TABLE) to create and maintain credit analyst codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.

Navigation

Set Up CRM, Common Definitions, Customer, Credit Analyst

Important! To ensure successful integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM, you must synchronize credit analyst codes manually between PeopleSoft CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP application messages that include codes that are not available in the subscribing system will fail.

Support Team Code Page

Use the Support Team Code page (TEAM_CODE_TBL) to create and maintain support team codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.

Navigation

Set Up CRM, Common Definitions, Codes and Auto Numbering, Support Team Codes, Support Team Code

Important! To ensure successful integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM, you must synchronize support team codes manually between PeopleSoft CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP application messages that include codes that are not available in the subscribing system will fail.

Interface Defaults Page

Use the Interface Defaults page (RB_EIP_DEFAULTS) to specify default values on customer records for fields that are required for integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM.

Navigation

Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Interface Defaults

When you create a customer or site record using the Company, Consumer, and Site components in PeopleSoft CRM, the system automatically populates the record with the values that you enter on the Interface Defaults page. Users can select alternate values for these fields using the Bill Options view of the Customer Roles page, which is available in each of the components.

Name Type Options Page

Use the Name Type Options page (RB_NM_TYPE_DFLT) to specify default name type values to use on company and contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM.

Navigation

Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Name Type Options

Image: Name Type Defaults page

This example illustrates the fields and controls on the Name Type Defaults page. You can find definitions for the fields and controls later on this page.

PeopleSoft CRM requires name type codes to create all business object records; however, PeopleSoft Financial Management Solutions and PeopleSoft SCM do not require name codes. To ensure that records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM are populated with name types that are valid in CRM, you specify default name type values here.

See [Defining Business Object and Name Types](#).

Company Name Type

Enter the default value to use for name type on company records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM. The system uses this value on customer records that are received through Customer (company, consumer, site) EIP application messages.

Person Name Type

Enter the default value to use for name type on contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM. The system uses this value on contact records that are received through Contact EIP application messages.

General Options Page

Use the General Options page (RB_INSTALLATION) to specify default exchange rate codes to use on company and contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM and ensure that required codes are available to the EIP.

Navigation

Set Up CRM, Install, Installation Options, General Options

Select the Collector/Credit Analyst Req check box. This prevents Customer (company, consumer, and site) EIP application message failures in PeopleSoft Financial Management Solutions and PeopleSoft SCM that are due to missing collector or credit analyst field values.

Important! You must manually synchronize exchange rate codes between PeopleSoft CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP Application messages that include codes that are not available in the subscribing system will fail.

Market-Enabling Company, Consumer, Site, and Contact EIPs

To market-enable company, consumer, site, and contact EIPs, use the Market Control Codes (RB_MKT_CTL_DFN) and Market Installation Options (RB_MKT_CTL_TBL) components.

This topic discusses how to specify the markets that PeopleSoft CRM integrates with.

Pages Used to Market-Enable Company, Consumer, Site, and Contact EIPs

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Market Control Codes Page</u>	RB_MKT_CTL_DFN	Define market control codes for market-enabling the Customer (company, consumer, and site) and Contact EIPs.
<u>Market Installation Options Page</u>	RB_MKT_CTL_TBL	Specify market options for a specific market or use with the Customer (company, consumer, and site) and Contact EIPs.
<u>Build CDM Interface Records Page</u>	RB_INT_BUILD	Run the Build CDM Interface Records Application Engine process (RB_INT_BUILD).

Market Control Codes Page

Use the Market Control Codes page (RB_MKT_CTL_DFN) to define market control codes for market-enabling the Customer (company, consumer, and site) and Contact EIPs.

Navigation

Set Up CRM, Common Definitions, Codes and Auto Numbering, Market Control Codes

Enter a market control code name and a description. Use the Comments field to add any more information. These control codes are used on the Market Installation Options page.

Market Installation Options Page

Use the Market Installation Options page (RB_MKT_CTL_TBL) to specify market options for a specific market or use with the Customer (company, consumer, and site) and Contact EIPs.

Navigation

Set Up CRM, Install, Market Installation Options

Image: Market Installation Options page

This example illustrates the fields and controls on the Market Installation Options page. You can find definitions for the fields and controls later on this page.

Market Control Code

Select the market control code.

Note: *CDMINTFC* is the market control code for CDM interface records.

Option Activated

Select to activate the code.

Note: Use this page for market-enabling credit card information as well.

Build CDM Interface Records Page

Use the Build CDM (Customer Data Management) Interface Records page (RB_INT_BUILD) to run the Build CDM Interface Records Application Engine process (RB_INT_BUILD).

Navigation

Set Up CRM, Common Definitions, Integration Rules, Integration Utilities, Request Processes, Build CDM Interface Records

Click Run to run the Build CDM Interface Records process, which populates the interface records.

Establishing Master ID Databases

This topic lists prerequisites and discusses how to set up master ID databases.

Pages Used for Establishing Master ID Databases

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Master ID DB Setup Page</u>	RB_IDMASTER	Designate which systems have the source (or master) object IDs.
<u>XML Test Utility Page</u>	RB_XML_TEST	Test calls between remote databases.

Prerequisites

You must first set up number type codes that relate object IDs to databases.

Master ID DB Setup Page

Use the Master ID DB Setup (master ID database setup) page (RB_IDMASTER) to designate which systems have the source (or master) object IDs.

Navigation

Set Up CRM, Common Definitions, Integration Rules, Remote Data Access, Master ID Owner, Master ID DB Setup

Important! Use the Master ID DB Setup page to indicate the location of the master database that is responsible for issuing identifiers for customers, contacts, and so on. You *must* do this on all databases in the community except the master. Failure to do so may result in duplicate customer and contact identifiers.

Number Type

Select the objects whose IDs will be generated by the master database that appears in the Master Database URL (uniform resource locator) field. You can select the database for generating IDs for customers, contacts, products, sales orders, and quotes.

Master Database URL

Enter the database URL for the master database. When an application must obtain an identifier, it checks this field to see if there is a value. If there is no value, then the system issues the identifier itself, because it is assumed that the database is the master. If there is a value, the system contacts the remote master database for the identifier.

XML Test Utility Page

Use the XML Test Utility page (RB_XML_TEST) to test calls between remote databases.

Navigation

Set Up CRM, Common Definitions, Integration Rules, Remote Data Access, XML Test Utilities, XML Test Utility

Image: XML Test Utility page

This example illustrates the fields and controls on the XML Test Utility page. You can find definitions for the fields and controls later on this page.

Transaction

Enter the identifier for the object whose ID generation you want to test. Enter 1 for customers, 2 for contacts, 3 for sales orders, 4 for quotes, and 5 for products. When you press Tab to exit the field, the system enters default values in the first three unlabeled text boxes.

The first unlabeled text box displays the setID or business unit for which the autonumber is to be generated; modify this if you like. Do not modify the other fields.

The second text box displays the next number to be generated. This is always *NEXT* by default; do not change the value.

The third field displays the zero padding indicator: *Y* (yes) to suppress leading zeros or *N* (no) to include leading zeros. You can modify this if you like.

The last two unlabeled fields are not used when testing autonumber generation.

Test

Click the Test button to fetch the next ID number from the external system. The result appears in the Text field. If the object's autonumbers come from the PeopleSoft CRM system (

and not an external ID master), the Text field displays the word *Local*.

Note: This test increments the number in the external system's database.

Mapping Message Data to PeopleSoft CRM Records and Fields

This topic discusses how to map message data to PeopleSoft CRM records and fields.

Page Used to Map Message Data to PeopleSoft CRM Records and Fields

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Message Data Mapping Page</u>	RB_CLAF_MAP	Map source fields to destination fields in PeopleSoft CRM.

Message Data Mapping Page

Use the Message Data Mapping page (RB_CLAF_MAP) to map source fields to destination fields in PeopleSoft CRM.

Navigation

Set Up CRM, Common Definitions, Process Automation, Message Mapping, Message Data Mapping

Image: Message Data Mapping page

This example illustrates the fields and controls on the Message Data Mapping page. You can find definitions for the fields and controls later on this page.

Message Data Mapping

Message Name KP_KPI_ASMT_FACTS
***Status** Active
Effective Date 08/21/2002

Message Data Mapping Find | View All First 1 of 1 Last

Record To Update BC

Identification and Assignment

Fields to Update

Record Field to Update	XML Tag Name		
ASSESS_DESCR	ASSESS_DESCR		
ASSESS_ID	ASSESS_ID		
ASSESS_IMAGE_ID	ASSESS_IMAGE_ID		
KPI_ID	KPI_ID		
PCT_OF_TARGET	PCT_OF_TARGET		
RESOLVED_VALUE	RESOLVED_VALUE		

Record Identification

Record Field Name	XML Tag Name		
CUST_ID	OBJ_ID		

Message Row Identification

XML Tag Name	XML Tag Value		
PF_OBJECT_TYPE	CUSTOMERMASTER		

Note: You can define message mapping for message with single-level hierarchy only.

Message Name Displays the message against which you want to perform data mapping.

Record To Update Enter the record that needs to be updated upon receiving the message into the PeopleSoft CRM system.

Fields to Update

Record Field to Update and XML Tag Name Select the fields to update along with the corresponding XML tags from the message that you plan to receive. The system updates the record fields with the value of the XML tag element from the received message.

Record Identification

Record Field Name and XML Tag Name Select a record field and corresponding XML tag. This criteria identifies the rows that must be updated when PeopleSoft CRM receives the message from another system. The system uses these fields to construct the *where* condition depending on the record fields and values of the corresponding XML tags.

Message Row Identification

XML Tag Name and XML Tag Value Select the XML tags and XML tag values for the given message. This determines whether the message row qualifies with the given criteria to update the information into PeopleSoft CRM.

In a message that you plan to receive, you may not want all of the rows to go to PeopleSoft CRM. Using these fields, you can sparse (filter) those rows from the received message.

Message Mapping Example

Here is an example of a message:

```
<?xml version="1.0"?>
<KP_KPI_ASMT_FACTS>
  <Fieldpiece>
    <KP_KPI_PUBL_TBL class="R">
      <BUSINESS_UNIT type="CHAR"/>
      <PF_SCENARIO_ID type="CHAR"/>
      <FISCAL_YEAR type="NUMBER"/>
      <ACCOUNTING_PERIOD type="NUMBER"/>
      <KPI_ID type="CHAR"/>
      <OBJ_ID type="CHAR"/>
      <TRGT_RULE_TYPE type="CHAR"/>
      <PF_OBJECT_TYPE type="CHAR"/>
      <RESOLVED_VALUE type="NUMBER"/>
      <ASSESS_ID type="CHAR"/>
      <ASSESS_IMAGE_ID type="CHAR"/>
      <ASSESS_DESCR type="CHAR"/>
      <PERIOD_END_DT type="DATE"/>
      <PCT_OF_TARGET type="NUMBER"/>
      <STRETCH_GOAL type="NUMBER"/>
      <CURRENT_TARGET type="NUMBER"/>
      <CURRENCY_CD type="CHAR"/>
      <RESOLVED_IND type="CHAR"/>
      <KPI_CALCDTM type="DATETIME"/>
      <KP_TREND_IND type="CHAR"/>
      <QTD_VALUE type="NUMBER"/>
      <YTD_VALUE type="NUMBER"/>
      <YEAR_OVER_YEAR_PCT type="NUMBER"/>
      <MONITOR_ONLY type="CHAR"/>
      <DESCR type="CHAR"/>
    </KP_KPI_PUBL_TBL>
  </Fieldpiece>
</KP_KPI_ASMT_FACTS>
```

```

    <KP_USER_FLD1 type="CHAR"/>
    <KP_USER_FLD2 type="CHAR"/>
    <PS_OWNER type="CHAR"/>
  </KP_KPI_PUBL_TBL>
  <PSCAMA class="R">
    <LANGUAGE_CD type="CHAR"/>
    <AUDIT_ACTN type="CHAR"/>
    <BASE_LANGUAGE_CD type="CHAR"/>
    <MSG_SEQ_FLG type="CHAR"/>
    <PROCESS_INSTANCE type="NUMBER"/>
    <PUBLISH_RULE_ID type="CHAR"/>
    <MSGNODENAME type="CHAR"/>
  </PSCAMA>
</FieldTypes>
<MsgData>
  <Transaction>
    <KP_KPI_PUBL_TBL class="R">
      <BUSINESS_UNIT>FSI01</BUSINESS_UNIT>
      <PF_SCENARIO_ID>1</PF_SCENARIO_ID>
      <FISCAL_YEAR>1998</FISCAL_YEAR>
      <ACCOUNTING_PERIOD>1</ACCOUNTING_PERIOD>
      <KPI_ID>1</KPI_ID>
      <OBJ_ID>200022</OBJ_ID>
      <TRGT_RULE_TYPE/>
      <PF_OBJECT_TYPE>CUSTMASTER</PF_OBJECT_TYPE>
      <RESOLVED_VALUE>11</RESOLVED_VALUE>
      <ASSESS_ID>11</ASSESS_ID>
      <ASSESS_IMAGE_ID>PS_COMPANY_ICN</ASSESS_IMAGE_ID>
      <ASSESS_DESCR>Green</ASSESS_DESCR>
      <PERIOD_END_DT/>
      <PCT_OF_TARGET>11</PCT_OF_TARGET>
      <STRETCH_GOAL>0</STRETCH_GOAL>
      <CURRENT_TARGET>0</CURRENT_TARGET>
      <CURRENCY_CD>USD</CURRENCY_CD>
      <RESOLVED_IND/>
      <KPI_CALCDTM/>
      <KP_TREND_IND/>
      <QTD_VALUE>4670</QTD_VALUE>
      <YTD_VALUE>4670</YTD_VALUE>
      <YEAR_OVER_YEAR_PCT>0</YEAR_OVER_YEAR_PCT>
      <MONITOR_ONLY/>
      <DESCR/>
      <KP_USER_FLD1>KPI</KP_USER_FLD1>
      <KP_USER_FLD2/>
      <PS_OWNER/>
    </KP_KPI_PUBL_TBL>
    <PSCAMA class="R">
      <LANGUAGE_CD>ENG</LANGUAGE_CD>
      <AUDIT_ACTN/>
      <BASE_LANGUAGE_CD>ENG</BASE_LANGUAGE_CD>
      <MSG_SEQ_FLG/>
      <PROCESS_INSTANCE>0</PROCESS_INSTANCE>
      <PUBLISH_RULE_ID/>
      <MSGNODENAME/>
    </PSCAMA>
  </Transaction>
</MsgData>
</KP_KPI_ASMT_FACTS>

```

From this message and the mapping that is provided, you can determine the:

- Message name - KP_KPI_ASMT_FACTS
- Record to update

This message updates the BC table.

- Fields to update

The BC table fields ASSESS_DESCR, ASSESS_ID, ASSESS_IMAGE_ID, KPI_ID, and PCT_OF_TARGET are updated with the values of XML tags <ASSESS_DESCR>, <ASSESS_ID>, <ASSESS_IMAGE_ID>, <KPI_ID>, and <PCT_OF_TARGET> in the message.

- Record identification

Subscription code updates the row in the BC table if the CUST_ID field value equals the value of the XML tag <OBJ_ID> in the message.

- Message row identification

Message rows qualify if the value of the XML tag <PF_OBJECT_TYPE> is equal to *CUSTOMERMASTER*; otherwise, the message rows are ignored.

Importing Data into PeopleSoft CRM

Understanding the Data Import Application Engine Process (RBIMPORT)

These topics lists prerequisites and discuss:

- Data Import process steps.
- Matching SQL.
- When to use the Basics Data AE process to load basic data.

Prerequisites

Before you import data into PeopleSoft Customer Relationship Management (PeopleSoft CRM), ensure that:

- The input file is sorted in key field order. For example, when you import multiple contacts to the same company, you must sort the input file on the *Company* field. This prevents duplicate BO_IDs from being assigned to the same company when all the matching criteria you specified are not met.
- The PeopleSoft super user ID has CREATE TABLE privileges for dynamic table creates.
- You define the FTP server so that it can store import file attachments.

To do this, modify the RB_IMP_ATTACH URL identifier by using the URLs - URL Maintenance page in PeopleTools.

See *PeopleTools: System and Server Administration*.

- You define data import global settings.

Data Import Process Steps

The Data Import process enables you to:

- Batch-load external data from other systems (in flat file format) into the PeopleSoft CRM database.

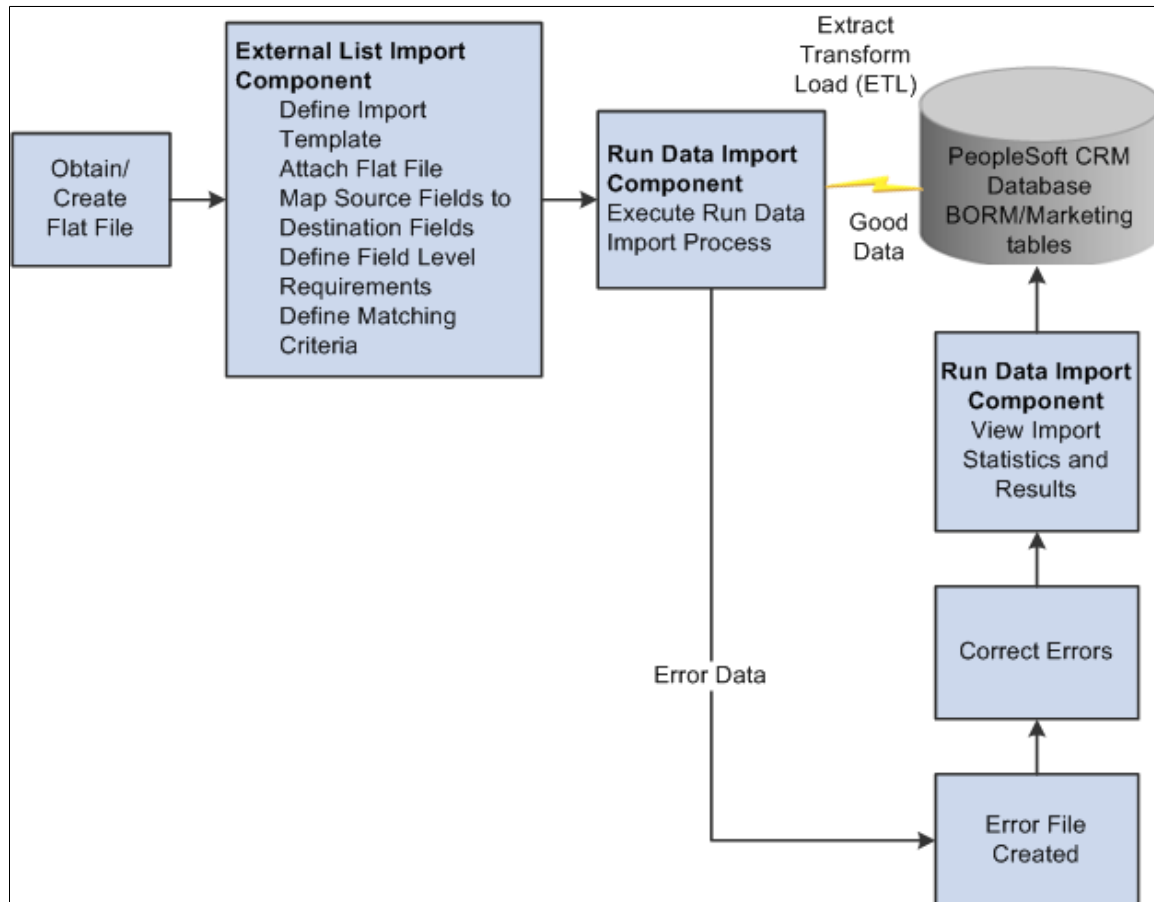
You do this mainly to load companies, contacts, and consumers. You also can generate marketing lists from the data that you load.

- Update existing individual and organization records with profile data for better targeting and personalization of marketing efforts.

Note: You cannot import profile fields of the *Text Block* data type, although you can import other fields in records that contain text block fields.

Image: Data Import process flowchart

This diagram shows the steps of the data import process.



To import data into PeopleSoft CRM:

1. Create a flat file with an accepted delimiter (tab, comma, or semicolon) for the import.

Data import accepts flat files with rows that have a blank address, phone number, and email address.

2. Define an import template that uses the flat file.

The import template must specify:

- Identifying information, such as the template name, role of the imported data, import file fields, import file name, and optionally, audience.
- Specifications for mapping between input fields and database fields.
- Matching criteria, or the criteria for determining whether the imported data matches existing database information.

3. (Optional) Validate the import template.

You can validate the template setup against the data file contents by running the Data Import process with the File Validation Only check box selected.

The file validation step checks the file contents and structure and writes errors to an error file. You can use this file to correct any problems prior to importing data. Examples of validations are length of fields in the import file compared to field lengths that are in the database, compatibility of data types, and number of delimiters in each row.

4. Run the import process.

You use the Data Import page to identify the import file, schedule the run, and specify import parameters.

5. View the status of the import process.

On the View Import Status page, you can view import dates, times, and statuses.

6. View import results including statistics on the number of inserted, matched, updated, and in-error import rows.
7. Correct data errors that prevent records from successfully loading and run the Data Import process again.

Matching SQL

When the Data Import process runs, it dynamically builds SQL statements that match input files with database fields, based on the matching criteria that you enter. These statements are stored in the stage and matching tables. When you schedule the Data Import process, you can choose to keep these tables and later fine-tune the generated SQL to improve data import performance.

Important! You should perform this function only with the assistance of qualified consultants. One bad change may render the whole Data Import process nonfunctional.

Related Links

[Business Object Relationship Modelling](#)

When to Use the Basics AE Process to Load Basic Data

The Data Import process automatically updates the basic data tables if you have selected the Process Basic Data Summary option on the CDM System Options page. However, situations might arise when you cannot use the Data Import process, for example:

- During initial data load.
- When you enable a new role or relationship.
- If you are updating the BORM from legacy systems and choose not to use the PeopleSoft-provided APIs.

In these cases, you must use the Basic Data Load Application Engine process (BO_BASIC) to update basic data.

Related Links

[Business Object Relationship Modelling](#)

Setting Up Data Import Global Settings

To set up data import global settings, use the Data Import Global Settings (RB_IMP_GLB_SETUP) component.

This topic discusses how to define data import global settings.

Page Used to Set Up Data Import Global Settings

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Data Import Global Setup Page	RB_IMP_GLB_PG	Define global settings that are for the Data Import process.

Data Import Global Setup Page

Use the Data Import Global Setup page (RB_IMP_GLB_PG) to define global settings that are for the Data Import process.

Navigation

Customers CRM, Data Import, Data Import Global Settings, Data Import Global Setup

Image: Data Import Global Setup page

This example illustrates the fields and controls on the Data Import Global Setup page. You can find definitions for the fields and controls later on this page.

Currency Code

Enter the default currency code, which the Data Import process uses for target tables that require a currency code.

Last Object Id Sequence

Enter a starting integer. Use this field when you create object IDs that are not system-generated. The format of generated IDs is *sequence number:counter*. For example, if the starting sequence number is 1, and you import a file with 100 companies, the format of the generated IDs is 1:1 through 1:100. A subsequent load of 50 company objects generates IDs 2:1 through 2:50.

Stage Table Generation

Dynamic Record Creation

Indicates that tables are dynamically created during the Data Import process, which executes many CREATE TABLE statements during processing. This is necessary to stage the imported data and to perform matching logic. You cannot edit this field.

Note: The PeopleSoft super user ID must have Create Table privileges for the process to finish successfully.

Auto number

Select to enable automatic number generation for imported data.

Stage Table Name Prefix

Enter the prefix for the staging tables. The staging tables are defined as *prefix_numeric value* (for example, STG_215). The system assigns numeric values in sequential order.

Last Stage Table Sequence

Enter a new sequence number, or leave the default, which is the last stage table sequence that the system creates. The system automatically assigns table sequences during the Data Import process. If you enter a new number, the system uses that number as its starting point in the process.

Tablespace Name

Enter the tablespace name under which you want the system to create the staging tables.

PeopleSoft CRM provides the predefined table space name (RDWORK).

Note: When performing the Data Import process on an Oracle or DB2 platform, you must define a SQL space name.

Dynamic Index Tablespace Name

Select *PSINDEX* for Oracle databases and *PSSGIXPT* for DB2. Tablespace fields are enabled for DB2 and Oracle databases only.

Note: If you need to specify a different tablespace, you must manually enter it in Query Analyzer.

Run Security AE (Run Security Application Engine)

Select this check box to run the security AE process against imported data. If this is not selected, imported data will not be available for applications that use application security.

Note: You can run the security AE against the entire database at a later time to make this data available.

Defining Data Import Templates

To define data import templates, use the Data Import (RB_IMP_DATA_CONFSR_GBL) component.

These topics discuss how to:

- Access data import templates.
- Define data import templates.
- Define import files.
- Map source fields to target fields.
- Specify concatenation.
- Define matching criteria.

- Verify template creation.

Pages Used to Define Data Import Templates

Page Name	Definition Name	Usage
Data Import Page	RB_IMP_DATA_CONFSR	Access a data import template to modify or add a new template.
Data Import - Step 1: Define Import Template Page	RB_IMP_HEADER	Define general information and the role with which the imported data is associated. The role determines the target field tree that appears at mapping time.
Audiences - Audience Details	RA_LIST_MAIN	Describe the audience for the imported data. For use in PeopleSoft Marketing, you must specify an audience of type <i>Internal using Import</i> .
Data Import - Step 2: Define Import File Page	RB_IMP_FILESPEC	Associate the flat file of data and load the header fields from the flat file to the import template. Optionally, assign user-friendly labels to the header fields.
Data Import - Step 3: Mapping Page	RB_IMPORT_MAP	Map the source fields that are contained in the flat file to the target fields in the PeopleSoft CRM database and define the field requirements.
Data Import - Select Target Field	RB_SEL_MAP_IN_FLD	View the target fields in a tree format to assist with target field selection in the mapping process.
Specify Concatenation Page	RB_MAP_CONCAT	Specify the fields and values that are concatenated to form the target field.
Data Import - Step 4: Matching Page	RB_IMP_MATCH_ADV	Define the matching rules for the import data. For example, define which existing field or set of fields in the PeopleSoft CRM database you want to specify as constituting a match for an individual or organization record.
Matching Secondary Page - Select Target Field page	RB_MATCH_SEL_FLD	Select the database field where the import field is stored.
Save Confirmation Page	RB_IMP_CONF_PG	Verify import template creation.

Data Import Page

Use the Data Import page (RB_IMP_DATA_CONFSR) to access a data import template to modify or add a new template.

Navigation

Customers CRM, Data Import, Data Import Templates, Data Import

Image: Data Import page

This example illustrates the fields and controls on the Data Import page. You can find definitions for the fields and controls later on this page.

Data Import
Use Sort to reorder the list of Import Templates. Use Filter to narrow the list of Import Templates.

Import Template	Import Type	Import Status
Fall Appl. Manufacturers Show	Company/Contact	Active
Comdex Attendees	Company/Contact	Active
Consumer Import	Consumers	Active
Students - Senior Year	Consumers	Active
Auto Magazine List	Consumers	Active
Company/Contact Import	Company/Contact	Active

Create a New Import Template

Search

Use Saved Search:

Search Clear Advanced Search Save Search Criteria Delete Saved Search Personalize Search

Import Template begins with

Import Role =

Import Status =

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

Create a New Import Template

Click to access the Data Import - Step 1: Define Import Template page and create a new import template.

Data Import - Step 1: Define Import Template Page

Use the Data Import - Step 1: Define Import Template page (RB_IMP_HEADER) to define general information and the role with which the imported data is associated.

The role determines the target field tree that appears at mapping time.

Navigation

- Click the Create a New Import Template button on the Data Import Template Search page.
- Select an existing template on the Data Import Template Search page.
- Click the Go Back to Import Definition button on the Save Confirmation page.
- Customers CRM, Data Import, Run Data Import, Run Data Import Search

Click the View Import Definition link on the Run Data Import page.

Image: Data Import - Step 1: Define Import Template page

This example illustrates the fields and controls on the Data Import - Step 1: Define Import Template page. You can find definitions for the fields and controls later on this page.

Data Import

1 2 3 4

Step 1: Define Import Template

Import Template

*Description: Company/Contact Import

*Import Role: Company/Contact

Source: ACZ

Import Status: In Process ☒ Import Blank Date Values?

Import as Audience (optional)

*SetID: CRM01

Audience Name: Contact list

[Return to Search](#) [Next >>](#)

Import Role

Select the role to associate with the import template. All records that are in the file are imported into the CRM database with the selected role. Values are:

- *Company*: Select for company records including sites for the company.

You must import sites in the context of a company by using the *Company* template.

- *Company/Contact*: Select for individual records for persons who function as contacts for companies.
- *Consumers*: Select for persons who do not function as contacts for companies.

Note: The role that you select here determines the objects to which you can map. For example, if you select *Consumer*, the only fields that are available to map to are those that are defined for the Consumer role.

Source

Enter the source of the information that is contained in the flat file. This field is associated with the template and not with individual records that are in the file. To associate a source with each record, create a text profile field that is called Source and

use the Data Import - Step 3: Mapping page to map a constant value into the field.

Import Status

Displays the import status that the system assigns when you begin to create an import template. Initially, the status is *In Process*. It stays as such until you complete the steps to define an import template, at which time it changes to *Active*.

Next

Click to access the Data Import - Step 2: Define Import File page and proceed to the next page in the import definition process.

Import as Audience

You can create audiences only for import data with the *Consumer* or *Company/Contact* role types.

The Data Import process imports only contact methods with the type of *Home* when creating audiences with the *Consumer* role. Other contact method types, such as *Business*, are ignored. This conforms to the requirements of the Marketing product.

Audience Name

Select an existing audience or click the Transfer to Audience button to define a new audience. The selected audience must have source of *Internal Using Import* and a status of either *In Design* or *Designed* to import the data into the PeopleSoft CRM database as a discrete audience.

If you import the records as an *Internal Using Import* audience, you can use the audience immediately after import. However, you can't further segment the audience in the Audience Builder.

If you want to do further segmentation rather than create an audience at the time of import, create a text profile field called Audience Source, and use the Mapping step to map a constant value in that field for all records. After import, create an internal audience by using the Audience Builder with the first condition *all records that are equal to the constant value that is mapped into the profile field called Audience Source*.

Data Import - Step 2: Define Import File Page

Use the Data Import - Step 2: Define Import File page (RB_IMP_FILESPEC) to associate the flat file of data and load the header fields from the flat file to the import template.

Optionally, assign user-friendly labels to the header fields.

Navigation

Click the Next button on the Data Import - Step 1: Define Import Template page.

\

Image: Data Import - Step 2: Define Import File page

This example illustrates the fields and controls on the Data Import - Step 2: Define Import File page. You can find definitions for the fields and controls later on this page.

Data Import

1 2 3 4

Step 2: Define Import File

Import Template: Company/Contact Import

File Information

File stage_test3.csv

View File Delete File

Delimiter Comma

Skip Lines 1

Header Row 1

☒ Header ☐ No Header

File Field List Customize Find View All First 1-4 of 4 Last

Field Name	Field Label
Company	Company
Fname	Fname
Lname	Lname
WorkEmail	WorkEmail

List Fields From File << Back Next >>

On initial access to this page when you are defining a new template, the Attach File button is available; the rest of the fields are empty. The Delete File and View File buttons are not available until you attach a file.

Attach File and View File

Click to browse for and upload a file that contains import data.

The Attach File button appears when you first access the page to define a new template; after you upload a file, the button text changes to View File.

Delete File

Click to delete the attached file.

Delimiter

Select the flat file delimiter *Comma*, *Semicolon*, or *Tab*.

Header and No Header

Select to indicate the presence or absence of a header row in the flat file.

Header Row

Enter the header row location in the field. If you do not enter a header row number, the system supplies 1 as the default.

Skip Lines

Enter the number of blank rows in the flat file.

List Fields From File

Click to list the field names and labels from the flat file.

If the flat file contains a header row, the system populates the Field Name column with the exact names of the fields (for example, lname and fname) that are contained in the header row of the flat file's header row. The system also populates the Field

Label fields with the same information as shown in the field name fields.

If the flat file doesn't contain a header row, the system populates these columns with *FIELD1*, *FIELD2*, and so on until all of the flat file fields are represented.

Change the field labels to represent the names of the flat file fields in a more meaningful and understandable way. For example, you might change the *lname* field label to *Last Name*.

Data Import - Step 3: Mapping Page

Use the Data Import - Step 3: Mapping page (RB_IMPORT_MAP) to map the source fields that are contained in the flat file to the target fields in the PeopleSoft CRM database and define the field requirements.

Navigation

Click the Next button on the Data Import - Step 2: Define Import File page.

Image: Data Import - Step 3: Mapping page

This example illustrates the fields and controls on the Data Import - Step 3: Mapping page. You can find definitions for the fields and controls later on this page.

Data Import

1 2 3 4

Step 3: Mapping

Import Template: Company/Contact Import

☐ No Grouping

Step 3: Mapping Customize Find 1-4 of 4 First Last

Mapping Action	Field Label	Select Target	Import Action	Required	Field Label
Field	Company	Company.Business Object Name	Import	<input checked="" type="checkbox"/>	Company
Field	Fname	Contact.First Name	Import	<input type="checkbox"/>	Fname
Field	Lname	Contact.Last Name	Import	<input checked="" type="checkbox"/>	Lname
Field	WorkEmail	Busn Email.Email Address	Import	<input type="checkbox"/>	WorkEmail

Advanced Customize Find 1 of 1 First Last

Mapping Action	Field Label	Specify Concatenation	Value	Select Target
Constant				Select Target

<< Back Next >>

When you access this page, the source field labels appear in the Step 3: Mapping scroll area, and the Advanced scroll area is collapsed.

You must map at least one source field from the flat file to a target field in the CRM database and you must map all required fields (required fields have an asterisk at the end of the field name in the folder tree view).

If you can perform one-to-one mapping of the source fields to the target fields, use the Mapping scroll area only.

To use a default constant in a target field, concatenate source fields into one target field, or enter a source field into multiple target fields, use both the Mapping and Advanced scroll areas.

No Grouping

To give you more control over what fields Data Import considers unique when two or more continuous rows have the same data, PeopleSoft CRM added the No Grouping check box.

For example, assume that you are importing the following data:

FIRST NAME	LAST NAME	EMPLID
Joe	Smith	123
Joe	Smith	124

Data Import considers First Name and Last Name unique, and therefore inserts only one row and updates the EMPLID to 124. If you, however, select the No Grouping check box, the system inserts or matches on every row.

Selecting Target Fields

Select Target

Click to select the database field that is updated by the input field or by an advanced mapping action.

When you click this link, a hierarchical tree structure appears with required fields marked by an asterisk (*). The hierarchy differs depending on the role that you selected for the import template. Required fields are at each folder level. If any field in the folder is mapped, then you must map the required fields in that folder and in the folders above it. The required fields provide the concatenated key to the target fields.

In the following example, the import role is *Company* and the source file field is *Work Email*. The *Business Object Name* field in the *Organization - Company* folder is required.

Image: Data Import - Select Target Field page (1 of 2)

This example illustrates the Data Import - Select Target Field page (1 of 2).



An intermediate level in the hierarchy, *Contact*, is not shown. The Lname field in the *Contact* folder is required and selected. The target field, Email Address, is defined in the lowest level folder, *Business Email-Contact*.

Image: Data Import - Select Target Field page (2 of 2)

This example illustrates the Data Import - Select Target Field page (2 of 2).



Mapping Source Fields to Target Fields

To map the source flat file fields to target fields, use the Step 3: Mapping region. Select a target for each field on the import file.

Ignore

Select to ignore this field and not import it when you perform the import process. This is useful for when you reuse import templates and want to import only a subset of the premapped fields.

Import

Select to import this field when you perform the import process.

Advanced Mapping Actions

The advanced mapping actions enable you to update database records when a one-to-one correspondence does not exist between database fields and fields in the import file.

Mapping Action

Select one of the following values:

- *Concatenate*

Select to concatenate two or more fields or values to form the target field.

- *Constant*

- *Field*

Select to map an already-mapped field from the import file to another target field.

Value

Enter the constant value with which to populate the target field. For example, if *Country* is a field in the database, and all input records are for *France*, you would enter a value of *FRA*.

This field appears only if you select a mapping action of *Value*.

To enter data, time, or date values, consult PeopleTools documentation to determine the correct formats.

Specify Concatenation

Click to access the Specify Concatenation page, where you can select the fields and values that are concatenated to form the target field.

Field Label

Select the field to be map to the target field from the available choices.

Specify Concatenation Page

Use the Specify Concatenation page (RB_MAP_CONCAT) to specify the fields and values that are concatenated to form the target field.

Navigation

Select a mapping action of Concatenate in the Advanced region of the Data Import - Step 3: Mapping page and click the Specify Concatenation link.

Image: Specify Concatenation page

This example illustrates the fields and controls on the Specify Concatenation page. You can find definitions for the fields and controls later on this page.

Specify Concatenation

Company.Revenue

Concatenation Type	Field Label	Value
Value		
Field	WorkEmail	

OK Cancel

Concatenation Type

Select *Value* to specify a constant in the Value column and *Field* to select from the import field labels in the Field Label list.

Data Import - Step 4: Matching Page

Use the Data Import - Step 4: Matching page (RB_IMP_MATCH_ADV) to define the matching rules for the import data.

For example, define which existing field or set of fields in the PeopleSoft CRM database you want to specify as constituting a match for an individual or organization record.

Navigation

Click the Next button on the Data Import - Step 3: Mapping page.

Image: Data Import - Step 4: Matching page

This example illustrates the fields and controls on the Data Import - Step 4: Matching page. You can find definitions for the fields and controls later on this page.

Data Import

1 2 3 4

Step 4: Matching

Import Template: Company/Contact Import

Match Rules

Operator	Select Target		
	Busn Email.Email Address	+	🗑
AND	Contact.Last Name	+	🗑
AND	Company.Business Object Name	+	🗑

Add 'OR' Condition Delete this Condition

OR

Operator	Select Target		
	Company.Business Object Name	+	🗑
AND	Busn Email.Email Address	+	🗑

Add 'OR' Condition Delete this Condition

Save Import Template << Back

This page enables you to specify the database fields that must match fields in the import file to update the database from the import file. If no match is found, the system inserts the incoming row as a new record in the CRM database. If a match is found, the system updates the existing record with new information from the file. You can override the update by deselecting the Update Matched Records check box when running the import process. In that case only, the system writes matched records to the error file.

New data never overwrites or updates an existing record's contact method fields (phone, email, and address); the new fields are appended as additional contact methods. All other types of mapped fields are updated or overwritten by the new data for matched records.

Warning! All fields, including email address, are case-sensitive for matching. To avoid instances in which a match is not found due to case-sensitivity, you should convert fields such as email address to lowercase prior to import. For example, convert Joe_Smith@ABC.com to joe_smith@abc.com before importing the file.

Matching Logic

Each template's matching criteria consists of one or more OR conditions, each of which contains an AND condition or a single field that must match. For example, in the condition shown, either all three of the fields, Busn_Email.Email Address, Contact.Last Name, and Company.Business_Object_Name must match their corresponding database fields or both of the fields Company.Business_Object_Name and Busn_Email.Email Address must match the database fields.

Note: You cannot nest conditions.

Add 'OR' Condition

Click to add an OR condition to the statement.

Note: You might see matching statements with conditions that are separated or nested using parentheses. These statements were developed in a previous version of PeopleSoft CRM. For upward compatibility, these statements act the same as they did in previous versions. However, if you make any changes to the statement, you must enter it in the new format

Save Confirmation Page

Use the Save Confirmation page (RB_IMP_CONF_PG) to verify import template creation.

Navigation

Click the Save Import Template button on the Data Import - Step 4: Matching page.

This page displays:

- A message that indicates whether the template is saved successfully.

The Import status is set to *Active*.

- The Run Data Import link.

Click this link to access the Run Data Import page and immediately run the import process.

- The Go Back to Import Definition link.

Click this link to access the Data Import - Step 1: Define Import Template page, view the existing template, and make any necessary changes.

Editing Matching SQL

To edit matching SQL, use the Edit Matching SQL (RB_IMP_MATCH_EDIT) component.

These topics discuss how to:

- Select a statement for editing.
- Edit a statement.

Pages Used to Edit Matching SQL

Page Name	Definition Name	Usage
<u>Edit Matching SQL Page</u>	RB_EDIT_MATCHING	Select a SQL statement for editing.
<u>Edit SQL page for Data Import Page</u>	RB_EDIT_SQL	Edit a SQL statement.

Edit Matching SQL Page

Use the Edit Matching SQL page (RB_EDIT_MATCHING) to select a SQL statement for editing.

Navigation

Customers CRM, Data Import, Edit Matching SQL

This page enables you to view SQL statements and their processing time from the last run of the data import template. You can select a statement and edit it.

Edit SQL page for Data Import Page

Use the Edit SQL page for Data Import page (RB_EDIT_SQL) to edit a SQL statement.

Navigation

Click the Edit button for any SQL statement on the Edit Matching SQL page.

Image: Edit SQL page for Data Import page.

This example illustrates the fields and controls on the Edit SQL page for Data Import page.. You can find definitions for the fields and controls later on this page.

Use this page to cut and paste the SQL statement to Query Analyzer, tune it, and replace the SQL statement with the tuned statement.

For example, an administrator runs a Data Import job with the Keep Tables option selected. After the job finishes or terminates due to performance issues, the administrator can access this page to review the SQL statements to see how long each one took and start tuning those ones that took a long time.

When finished editing, the administrator saves the matching SQL and can rerun the same Data Import template.

Running the Data Import Application Engine Process (RBIMPORT)

This topic discusses how to run the Data Import process.

Pages Used to Run the Data Import Application Engine Process (RBIMPORT)

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Data Import Page	RB_IMP_RUN_CONFSRC	Search for and view existing templates to use for the Data Import process.
Data Import	RB_IMP_RUN_DATA_PG	Run the Data Import process.
Import Multiple Files	RB_IMP_MULTI_FILES	Search for and upload additional files for data import.

Data Import Page

Use the Data Import page (RB_IMP_RUN_CONFSRC) to search for and view existing templates to use for the Data Import process.

Navigation

Customers CRM, Data Import, Run Data Import, Data Import

Image: Data Import page (1 of 2)

This example illustrates the fields and controls on the Data Import page (1 of 2). You can find definitions for the fields and controls later on this page.

Data Import

Import Template Consumer Import

File Information

File

☐ **File Validation Only**

Delimiter Comma

☒ Header ☐ No Header

Schedule ☒ Now ☐ Future

Date 11/10/2014 **Time** 7:33:48AM

of Additional Files 0

Skip Lines 1

Header Row 1

Character Set ANSI

Import Options

*SetID

☒ **Update Matched Records**

☐ **ImportContactMethod as Primary**

☐ **Overwrite Many-rows Profile**

Import Options

☐ **Reuse Tables** ☐ **Keep Tables** ☐ **Delete Old Tables**

File Field List

Import as Audience (optional)

[View Import Template](#) [Return to Search](#)

File Information**Attach File and View File**

Click to access a page where you can search for and upload the import file. After you attach a file, the button text changes to *View File*.

Process Additional Files

Click to upload one or more additional flat files. The system processes all attached flat files in parallel; this enables you to speed up the data import process by breaking up one large file into smaller files.

File Validation Only

Select to perform data validation tests of the Data Import process before you actually perform the process. This is a preventive step that is useful for new files from unknown vendors.

This option runs the Data Import process to validate data types that are within the file, but it doesn't perform the data update. For example, if a character string is mapped to a number field or a mapped date is not in the correct format, an error occurs. The process also checks whether mapped fields are longer than the target field. The end result is an error file that contains all of the input rows with detailed error messages so that you can make corrections.

Schedule

Select Future and enter a date and time when the Data Import process is to run, or select Now. If you enter a past date, the system runs the process immediately.

Character Set

Select the input data file type, for example, *UTF8*. All installed character sets are available for selection.

Update Matched Records

Select to specify that target data be updated with source data from the flat file when a match exists between a source record and an existing target record in the database. The rules that you set up on the Data Import - Step 4: Matching page determine the match.

If you do not select this check box, you must view the error file to see a list of the records that match but are not updated.

See [Data Import Page](#).

Note: Contact method fields are never updated with imported data; instead, the new information is added to the database.

Import Contact Methods as Primary

Select to enforce that an imported contact method is checked as *Primary*. This overwrites existing primary flags in the PeopleSoft CRM database. If you do not select this check box (which is deselected by default), the system still imports all mapped contact methods, but none are flagged as *Primary*.

Every PeopleSoft CRM business object supports multiple contact methods of each type. For example, a contact or consumer who is named John Doe can have multiple business email addresses, multiple home phone numbers, and so on. However, John Doe can have only one primary home phone number.

Overwrite Many-Rows Profile

Select to overwrite existing data if multiple rows of information can exist for a business object, for example, contact methods for a customer. If this check box is not selected, the Data Import process inserts new database records with the imported data.

Reuse Tables

Select to use existing stage and matching SQL tables that were generated in a previous run of the template.

Keep Tables

Select to retain the stage tables. This option is selected and disabled by default if the Reuse Tables option is selected.

Delete Old Tables

Select to remove all previous versions of the stage and matching tables, but keep the current one. This option is selected by default if stage and matching tables exist from a previous run.

Import Data

Click to run the Data Import process and open the Import Status group box, which displays the status of the Run Data Import process and contains a View Import Statistics link.

File Field List

The File Field List region displays the fields that are associated with the import template. This enables you to verify whether the import works in the case where you access the Data Import process directly from the menu and use an existing template.

Import As Audience

The fields in this section function similarly to the identical fields on the Define Import Template page. Values that you enter override the value on the import template.

Import Status

The Import Status group box appears only after you click the Import Data button.

View Import Statistics

Click to access the View Import Statistics page.

Note: New contacts who are imported for existing companies are reported as updates because this updates the company's contact data.

Viewing the Data Import Process Status

These topics discuss how to view the status of the Data Import process. You can:

- View the status of one data import process instance.
- View import statistics.
- View the data import process error file..

Pages Used to View the Data Import Process Status

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Data Import Page</u>	RB_IMP_VIEW_CONFSR	View instances, or runs, of the Run Data Import process.
Data Import	RB_IMP_VIEW_STATUS	View the status of one instance of the Data Import process.

Page Name	Definition Name	Usage
<u>View Import Statistics Page</u>	RB_IMP_VW_STATS	View import statistics.

Data Import Page

Use the Data Import page (RB_IMP_VIEW_CONFSR) to view instances, or runs, of the Run Data Import process.

Navigation

Customers CRM, Data Import, View Import Status

View File

Click to view the flat file that is used for the Data Import process.

View Error File

Click to download and view the error log file that the Data Import process creates. The error log contains details about the rows that are in error so that you can fix them and rerun the process. If the Update Matched Records option is not selected on the Data Import page, the error log also contains a listing of the records that match but are not updated.

View Import Statistics

Click to access the View Import Statistics page and view the import statistics, number of rows inserted, updated, and matched, and the total number of records that are processed.

View Import Statistics Page

Use the View Import Statistics page (RB_IMP_VW_STATS) to view import statistics.

Navigation

Click the View Import Statistics link on the Run Data Import page or the View Import Status page.

This page displays the import statistics from the Data Import process.

View Process Monitor

Click to access the Process Monitor - Process List page and monitor the Data Import process in detail.

See PeopleTools: PeopleSoft Process Scheduler.

View Error File

Click to download and view the error file that the Data Import process creates. The error file contains details about the rows that are in error so that you can fix them and rerun the process, if desired.

Viewing the Data Import Process Error File

Access the error file.

The error file looks just like the input flat file except that after every row messages appear about what is wrong with the input row. Correct the problems with data on this error file and then rerun the Data Import process by using this file.

Running the Basics AE Process

These topics provide an overview of the Basics AE process (BO_BASICCS) and discuss how to:

- Disable unnecessary roles, relationships, and contact methods.
- Optimize the database for performance.
- Submit the Basics AE process.

Page Used to Run the Basics AE Process

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Application Engine Request Page</u>	AE_REQUEST	Submit the Basics AE (BO_BASICCS) process.

Understanding the Basics AE Process

The Basics AE process reduces the complex tables and relationships contained in the BORM to two flat tables, BO_BASIC_IND (for data that is related to individuals) and BO_BASIC_ORG (for data that is related to organizations). For every customer business object that is enabled for Basics by role or relationship, the Basics AE finds all related business objects and writes the information to the relevant tables for use by the PeopleSoft Online Marketing and Marketing products.

For example, a customer company has four sites, each site has four contacts, and each contact has four contact methods. The process locates 64 (4 times 4 times 4) business objects to get contact information for the customer and organizes this information into a single BO_BASIC_IND record per role and relationship type keyed by the customer's business object identifier (BO_ID), role, and relationship ID. Rows for both the company and the site are populated in the BO_BASIC_ORG table.

On a large database, for example seven million rows, this process might run for several hours. You can significantly improve the performance of this process by enlisting the services of qualified implementation consultants or a database administrator (DBA). Working with these persons, you can tailor the Basics AE process to meet specific requirements and improve process performance.

The contact methods displayed in the Audience result grid are taken directly from the Basic Data tables. To show values for all the contact methods in the Audience result grid, Contact/Consumer contact methods must be set up to follow the corresponding mapping logic for Basic Data.

Step 1: When adding a person, you should ignore the description field, and concentrate on the Type fields. After doing that, remember that the first data entry you make by default becomes the primary contact information for all roles.

Step 2: Go to the Advanced Options section of the Address Book, and manually define the primary address, phone, and email info for each role.

Disabling Unnecessary Roles, Relationships, and Contact Methods

The Basics AE process dynamically reads all enabled roles, relationships, and mappings. To tailor the process for your particular requirements and improve process performance, you can disable or remove the following information:

- Basic data for roles.

You are not required to implement all delivered roles for an installation, or copy all implemented roles to basic data. To disable a role for basic data, deselect the Enabled for Basic Data option for the role on the Role Type page.

The roles that are enabled for basic data as delivered are:

- Company
- Site
- Worker
- Contact
- Individual Consumer

- Basic data for relationships.

You can also disable relationships for basic data if they are not used. Disable a relationship by deselecting the Enabled for Basic Data check box on the Relationship Type page. The relationships that are enabled for basic data as delivered are:

- Primary Contact / Company
- Contact / Company

- Remove basic data mappings for contact method purposes that are not needed. You can add or clone these mappings if they are needed in the future.

The basic data mappings are delivered with multiple contact method purpose types associated with each role and relationship. These are the contact method purpose types that are mapped as delivered, and they vary by role:

- Phone - Business
- Phone - FAX
- Phone - Home
- Email - Business
- Email - Home
- Address - Business
- Address - Home

To remove a contact method purpose from a role or relationship, display the role or relationship on the Basic Data Mappings page, scroll to the contact method purpose row, and use the Delete Row button.

Optimizing the Database for Performance

The DBA might perform some or all of the following actions:

Stripe the Disks on Which Data Resides

Striping is the process of dividing data into blocks and locating the blocks on different physical disks, which enables parallel database processing and speeds up the run.

Run SQL to Detect Problematic Data

The following data conditions can cause the Basics AE program to run inefficiently and can be detected and addressed prior to running the process:

- Duplicate primary contact methods.

Use this sample SQL to detect duplicates in the *Phone* table. You must run the same SQL for the *Address* and *Email* tables. To do so, replace each occurrence of the table name *PS_BO_SRCH_PHN* with *PS_BO_SRCH_ADD* (for address) and *PS_BO_SRCH_EML* (for email) before running.

```
SELECT BO_ID, ROLE_TYPE_ID, BO_REL_ID, COUNT(*) FROM PS_BO_SRCH_PHN BO_CM_VW →
WHERE BO_CM_VW.ROLE_TYPE_ID IN (2, 3, 4, 8, 9, 11) AND BO_CM_VW.BO_CM_START_DT →
<= { fn CURDATE() } AND BO_CM_VW.BO_CM_END_DT > { fn CURDATE() } AND BO_CM →
VW.CM_USE_START_DT <= { fn CURDATE() } AND BO_CM_VW.CM_USE_END_DT > { fn CURD →
ATE() } AND BO_CM_VW.PRIMARY_IND = 'Y' AND BO_CM_VW.PROFILE_CM_SEQ = (SELECT →
MAX(G2.PROFILE_CM_SEQ) FROM PS_BO_SRCH_PHN G2 WHERE G2.BO_ID = BO_CM_VW.BO →
ID AND G2.BO_CM_START_DT = BO_CM_VW.BO_CM_START_DT AND G2.CM_USE_START_DT = →
BO_CM_VW.CM_USE_START_DT AND G2.CM_USE_ID = BO_CM_VW.CM_USE_ID AND G2.ROLE_T →
YPE_ID = BO_CM_VW.ROLE_TYPE_ID AND G2.BO_REL_ID = BO_CM_VW.BO_REL_ID AND G2. →
BO_REL_POSITION = BO_CM_VW.BO_REL_POSITION) GROUP BY BO_ID, ROLE_TYPE_ID, BO_R →
EL_ID HAVING COUNT(*) > 1
```

- Duplicate BO_ID in the Person table.

Run this SQL to detect duplicates in the Person table.

```
SELECT BO_ID, COUNT(*) FROM PS_RD_PERSON GROUP BY BO_ID HAVING COUNT(*) > 1
```

Gather Runtime Statistics

The Basics AE process step *CDMXSTAT* gathers and updates runtime statistics that are used by the relational database engine to optimize queries and find free space. This provides information to the engine about the distribution of data and improves the chances of index usage. This step is recommended after large numbers of rows are inserted or tables are reorganized, or when indexes are added or removed.

The DBA can disable this step (by making it *Inactive* in Application Designer) prior to a run if the statistics are already updated.

Drop and Rebuild Indexes

Drop table indexes and re-create them manually after the Basics AE process runs successfully. This is especially helpful on *DB2UNIX* or *DB2* platforms. You can drop the indexes manually or enable the Basics AE process step *CDMXDROP* to drop indexes

This is the list of indexes to drop and re-create:

- PS0BO_BASIC_IND
- PS1BO_BASIC_IND
- PSABO_BASIC_IND
- PSBBO_BASIC_IND
- PSCBO_BASIC_IND
- PSDBO_BASIC_IND
- PSEBO_BASIC_IND
- PS0BO_BASIC_TMP1
- PS1BO_BASIC_TMP1
- PS0BO_BASIC_TMP2
- PS1BO_BASIC_TMP2
- PSABO_BASIC_ORG_TMP2
- PSABO_BASIC_ORG
- PSBBO_BASIC_ORG
- PSCBO_BASIC_ORG

Inactivate Scheduled Jobs That Can Conflict with the Basics Process

The jobs *CM_FLTM* (for 8.9 and prior releases) and *CM_MAINT* (for release 9) are regularly scheduled to synchronize the normalized BORM tables to the flattened contact method tables. This improves access to contact methods for online processing, but can cause performance issues when run concurrently with the Basics AE.

To inactivate these jobs and any others that might cause data conflicts, use the PeopleTools Schedule JobSet Definitions page located under PeopleTools, Process Scheduler. Search for the job name and select *Inactive* in the Status field. Save the job definition.

When the Basics process ends, reactivate this job.

Application Engine Request Page

Use the Application Engine Request page (AE_REQUEST) to submit the Basics AE (BO_BASIC) process.

Navigation

PeopleTools, Application Engine, Request AE, Application Engine Request

See the documentation for *PeopleTools: Application Engine*.

