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PEOPLESOFT ENTERPRISE

PeopleSoft Enterprise Sales 9 PeopleBook

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About This PeopleBook

PeopleSoft Enterprise PeopleBooks provide you with the information that you need to implement and use PeopleSoft Enterprise applications from Oracle.

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only elements, such as fields and check boxes, that require additional explanation. If an element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft Enterprise applications are defined in this preface.

PeopleSoft Enterprise Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft Enterprise applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

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The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your PeopleBooks Library. You'll find a variety of useful and timely materials, including updates to the full line of PeopleSoft Enterprise documentation that is delivered on your PeopleBooks CD-ROM.

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See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

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Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

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Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft Enterprise or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
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.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (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 (|).

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Typographical Convention or Visual Cue	Description
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft Enterprise system.

Note. Example of a note.

If the note is preceded by *Important!,* the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading "See Also" or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, 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 country-specific heading: "(FRA) Hiring an Employee"

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

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

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Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- 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 PeopleBooks:

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

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Once, Always, and **Don't Run**	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

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Oracle's PeopleSoft Enterprise CRM Sales Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleSoft CRM automation and configuration tools.
- PeopleTools PeopleBook.

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

PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise Sales 9 PeopleBook* provides implementation and processing information for your PeopleSoft Enterprise Sales application. However, additional essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook.* Each PeopleSoft product line has its own version of this documentation.

The *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook* contains these parts:

- CRM Multi-Product Foundation.

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

- Workforce Management.

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

- Interactions and 360-Degree Views.

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

- Self-Service for Customers.

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

- Relationship Management.

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

- Entitlement Management.

  This part discusses setting up agreements and warranties.

- SmartViews

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

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "PeopleSoft Enterprise Customer Relationship Management Application Fundamentals Preface"

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PeopleSoft Automation and Configuration Tools

The *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to your application PeopleBook.

The *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook* contains these parts:

- Correspondence management.

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

- Automation tools.

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

- Configuration tools.

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

- Knowledge management.

  This part discusses the setup of Natural Language Processing (NLP) and Verity search.

- Business process management.

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

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

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "PeopleSoft CRM Automation and Configuration Tools Preface"

PeopleSoft Enterprise CRM Business Object Management

The *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft CRM.

The PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook has these parts:

- Business Object Management Basics.

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

- Data Management for Organization Business Objects.

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

- Data management for Individual Business Objects.

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

- Business Object Management.

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

- Customer and Worker Data Integrations.

  This part discusses how to integrate customer and worker data with other systems. PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the Enterprise PeopleTools 8.48 PeopleBooks.

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PART 1

Setting Up PeopleSoft Enterprise Sales

Chapter 1
Getting Started with PeopleSoft Enterprise Sales

Chapter 2
Navigating in PeopleSoft Enterprise Sales

Chapter 3
Setting Up Business Units for PeopleSoft Enterprise Sales

Chapter 4
Setting Up Sales Security and Personalization

Chapter 5
Setting Up Sales Leads and Opportunities

Chapter 6
Setting Up Sales Forecasts

CHAPTER 1

Getting Started with PeopleSoft Enterprise Sales

This chapter provides an overview of PeopleSoft Enterprise Sales and discusses:

- PeopleSoft Enterprise Sales integrations.
- PeopleSoft Enterprise Sales implementation.

PeopleSoft Enterprise Sales Overview

To drive profitable revenue growth, you need to align your sales strategy with customer needs and corporate objectives. This strategy must be supported by the territory and incentive structure, and requires real-time visibility across multiple channels to optimize your sales processes in response to market changes. You also need to ensure that your sales force has the right capabilities and tools to execute the strategic plan. PeopleSoft Enterprise Sales enables you to:

- Leverage the right channels, resources, and offerings to differentiate your business from others and prevail over the competition.
- Motivate and track sales performance using metrics-driven planning and compensation tools.
- Increase operational efficiency by integrating sales processes across the enterprise.
- Extend your sales reach through partners and other channels.
- Maximize sales productivity and build profitable, loyal customer relationships.

PeopleSoft Enterprise Sales enables you to enter, assign, and track sales leads and opportunities. After you have entered sales opportunities into your database, you can view the opportunity pipeline and generate forecasts to manage your sales efforts successfully.

With this application, you can:

- Define a territory tree that represents the sales organization.
- Create or import sales leads.
- Convert a lead to an opportunity.
- Create sales opportunities.
- Assign a lead or opportunity to a sales representative by using the territory tree.
- Include opportunities in sales forecasts.
- Roll up forecasts in the territory tree.

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PeopleSoft Enterprise Sales Integrations

PeopleSoft Enterprise Sales integrates with these PeopleSoft applications:

- PeopleSoft Enterprise Order Capture.
- PeopleSoft Enterprise Telemarketing.
- PeopleSoft Enterprise Marketing.
- PeopleSoft Enterprise Online Marketing.
- PeopleSoft Enterprise Strategic Account Planning.
- PeopleSoft Enterprise Mobile Sales.
- PeopleSoft Enterprise Partner Sales.

We discuss integration considerations in the implementation chapters in this PeopleBook.

Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection website.

PeopleSoft Enterprise Sales Incentive Management

The Incentive Management solution addresses the definitive goals of mature incentive management software, which are to capture and calculate incentive pay data, to administer compensation information that can be communicated to incentive plan participants in a timely and accurate manner, and to adjust compensation information as needed before final payout. This solution supports global incentive management needs regardless of your organization's size.

Sales Incentive Management is the first product category offering within the Incentive Management solution and is designed to meet the needs of incentive management for sales organizations. This product category is built upon the EIM foundation and consists of the High Tech and Industrial market template and the Banking and Capital Markets market template.

See *PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook*

See *PeopleSoft Enterprise Sales Incentive Management for Banking and Capital Markets 8.9 PeopleBook*

See *PeopleSoft Enterprise Sales Incentive Management for High Tech and Industrial 8.9 PeopleBook*

PeopleSoft Enterprise Sales Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

PeopleSoft Enterprise Sales also provides component interfaces for loading data from an existing system into PeopleSoft Enterprise Sales tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have component interfaces:

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Component	Component Interface	Reference
Industry RSF_INDUSTRY	RSF_INDUSTRY_SCI	See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Control Values for Business Objects," Defining Industries.
Territory Node RSF_TERRITORY	RSF_TERRITORY_SCI	See Chapter 8, "Creating Territory Trees," Creating or Editing Territories, page 99.
Sales Users RSF_SUSER	RSF_SUSER_SCI	See Chapter 4, "Setting Up Sales Security and Personalization," Setting Up Sales Users, page 18.
Sales Team RSF_TEAM	RSF_TEAM_SCI	See Chapter 4, "Setting Up Sales Security and Personalization," Setting Up Sales Teams, page 25.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook,* with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "PeopleSoft Enterprise Customer Relationship Management Application Fundamentals Preface," Additional Resources

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

PeopleSoft Enterprise Setup Manager for CRM 9 PeopleBook

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CHAPTER 2

Navigating in PeopleSoft Enterprise Sales

This chapter discusses how to navigate in PeopleSoft Enterprise Sales.

Navigating in PeopleSoft Enterprise Sales

PeopleSoft Enterprise Sales provides custom functional area navigation pages that contain groupings of folders that support a specific business process, task, or user role.

Note. In addition to PeopleSoft Enterprise Sales custom navigation pages, PeopleSoft provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook

Pages Used to Navigate in PeopleSoft Enterprise Sales

This table lists the custom navigation pages that are used to navigate in PeopleSoft Enterprise Sales.

Sales Center

The Sales Center custom navigation pages are geared to the person in your organization who is focused on performing various sales related activities.

Page Name	Navigation	Usage
Sales Center	Main Menu, Sales Center	Access primary Sales Center menus.
Calendars, Tasks, and Call Reports	Click Calendars, Tasks, and Call Reports on the Sales Center page.	Review and update tasks, events that are recorded on the monthly calendar and call reports. Add or update call reports. Access the My Calendar, My Tasks, Search Call Reports, and Add Call Report pages.
Contacts	Click Contacts on the Sales Center page.	View and manage your hot contacts. Access the My Contacts, Add Person, Search Person, and My Accounts pages.

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Page Name	Navigation	Usage
Leads	Click Leads on the Sales Center page.	View leads and sort/filter leads based on selected criteria. Access the Add Lead and Search Leads pages.
Opportunities	Click Opportunities on the Sales Center page.	Create new opportunities and review and manage existing opportunities. Sort/filter based on selected criteria. Access the Add Opportunity, Search Opportunities, and Review Pipeline pages.
Forecasts	Click Forecasts on the Sales Center page.	Adjust and analyze revenue projections from alternative perspectives. Access the Search My Forecasts, Search Rollup Forecasts, and Lock Forecast pages.
Salesforce	Click Salesforce on the Sales Center page.	Adjust and redistribute leads, opportunities, tasks, and territories to accommodate changes in your team and organization. Access the Reassign Sales Activities, Search Reassignments, Reorganize Territories, and Search Reorganizations pages.

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CHAPTER 3

Setting Up Business Units for PeopleSoft Enterprise Sales

This chapter provides an overview of business units in PeopleSoft Enterprise Sales and discusses how to set up business units for PeopleSoft Enterprise Sales.

Understanding Business Units in PeopleSoft Enterprise Sales

Business units are used across PeopleSoft Enterprise product lines to define an organization for reporting purposes. Business units in PeopleSoft Enterprise Sales might be defined by geographic location, product line, fulfillment center, or some other organization-specific guideline. The Sales business unit also provides a mechanism for defining defaults and processing controls used when creating leads and opportunities.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Working with Business Units and TableSet Controls"

Setting Up Business Units for PeopleSoft Enterprise Sales

To set up business units for PeopleSoft Enterprise Sales, use the Sales Definition (RSF_BUS_UNIT_TBL) component.

This section discusses how to create business unit definitions for PeopleSoft Enterprise Sales.

Page Used to Set Up Business Units for PeopleSoft Enterprise Sales

Page Name	Object Name	Navigation	Usage
Sales Definition	RSF_BUS_UNIT_TBL	Set Up CRM, Business Unit Related, Sales Definition	Create business unit definitions for PeopleSoft Enterprise Sales.

Creating Business Unit Definitions for PeopleSoft Enterprise Sales

Access the Sales Definition page.

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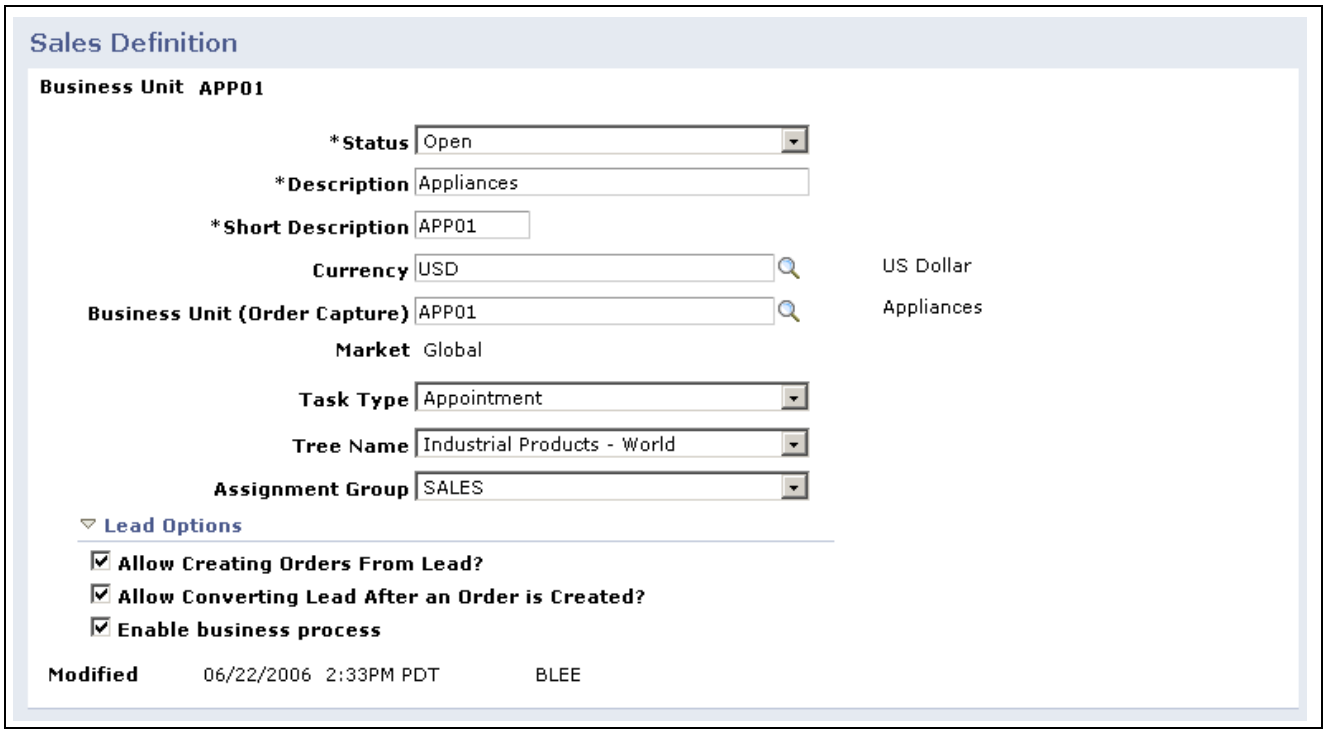

Sales Definition page

Status Select the business unit's status, either *Open* or *Closed*.

Default Set ID Select the default setID for the business unit. After you click the Create BU button, this field is no longer available.

Currency Enter the currency to use as the business unit's default currency.

Business Unit (Order Capture) Enter the PeopleSoft Order Capture business unit to use with the PeopleSoft Enterprise Sales business unit if you have also licensed PeopleSoft Order Capture. The Order Capture business unit defined here appears by default in the quotes and orders that are generated when a lead or opportunity is converted to a quote or order.

Note. In addition to entering the Order Capture business unit, you must specify the third-party tax vendor (such as Taxware, Vertex, or WorldTax) on the Order Capture Business Unit Definition page. If you don't specify a tax vendor for the Order Capture business unit, no tax calculations can be included in quotes and orders.

Market By default, the Market field is set to *Global*. You cannot change this value.

Task Type Select the type of task to use as the default task for the business unit. When you create a task in the Lead or Opportunity component, the system uses the default task type defined here.

Tree Name Select the territory tree name to use as the default territory tree for the business unit.

See Chapter 8, "Creating Territory Trees," page 95.

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Create BU (create business unit) Click this button to create the PeopleSoft Enterprise Sales business unit.

Assignment Group Select the assignment group to use as the default assignment group for the business unit. You must click the Create BU button before you can select the assignment group.

See Chapter 7, "Configuring Assignment Criteria," Creating Assignment Groups, page 86.

Lead Options

Allow Creating Orders From Lead Select to enable users to create orders from leads that belong to the business unit. When this check box is cleared, users cannot create orders from leads associated with the business unit. Depending on whether your organization has a short or long sales cycle, use this check box to control whether you can use a lead to create an order without converting the lead to an opportunity.

Allow Converting Lead After Order is Placed Select to enable users to convert leads in the business unit to opportunities, even if an order has been placed. When this check box is cleared, users cannot convert the business unit's leads to opportunities after an order is placed.

Enable business process Select to enable use of the Convert Leads or Opportunities automated business process.

See Appendix B, "Sales Delivered Business Processes and Web Services," page 271.

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CHAPTER 4

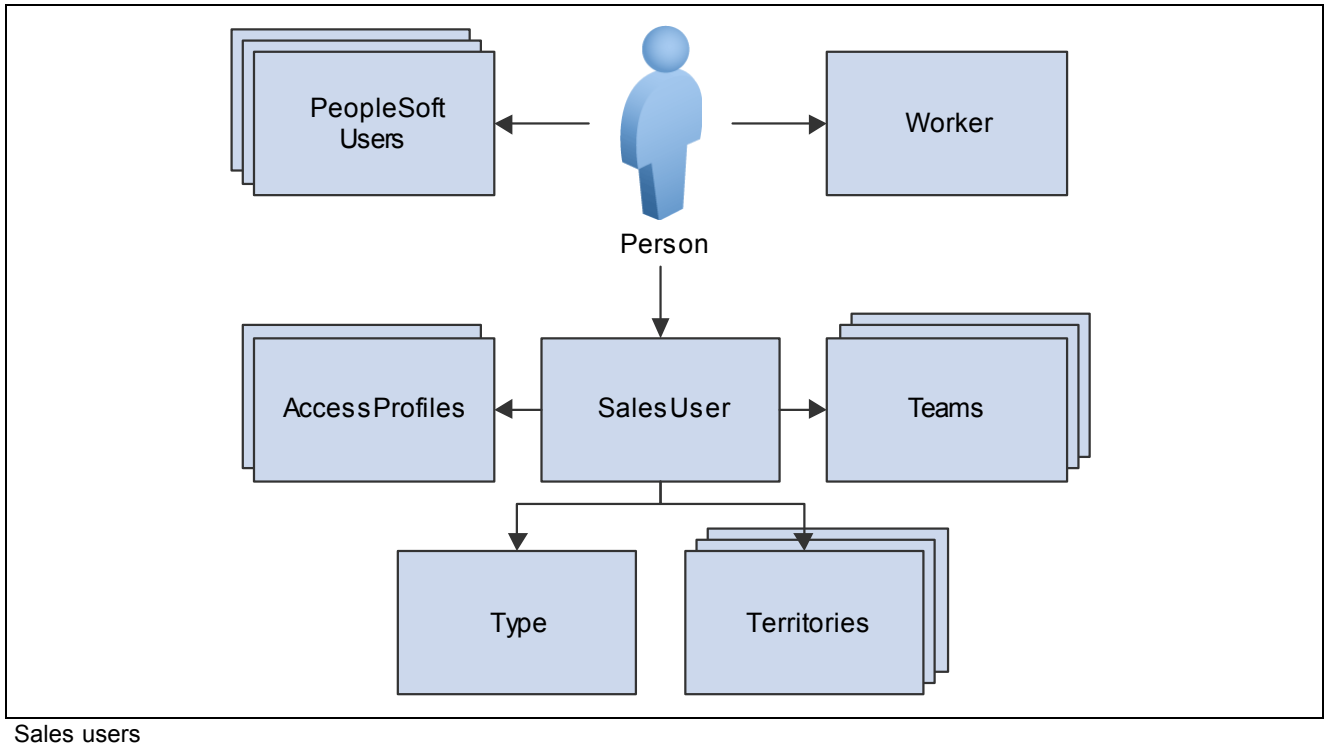
Setting Up Sales Security and Personalization

This chapter provides an overview of sales users and discusses how to:

- Set up sales access profiles.
- Set up sales users.
- Set up sales teams.
- Set up functional options.

Understanding Sales Users

This diagram shows that PeopleSoft Enterprise Sales users include sales people, sales managers, sales product managers, administrators, technical support staff, other members of the organization, and partners:



Sales users

To enable someone to use PeopleSoft Enterprise Sales, create the following IDs in the system:

- PeopleSoft user

  An individual must exist in the system as a PeopleSoft user with a user ID, which you set up in PeopleTools.

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- Person

  Access the Contact link by clicking Customers CRM and create the individual as a PeopleSoft Enterprise Customer Relationship Management (PeopleSoft CRM) contact with a person ID. Set the contact flag to *Internal* for employees and *External* for partners and consultants.

  If you use PeopleSoft Enterprise Partner Relationship Management, you can set up partners in that application.

  See *PeopleSoft Enterprise CRM 9 Partner Relationship Management PeopleBook.*

Note. You must also set up employees under Workforce as PeopleSoft CRM workers so that they have employee IDs.

- Sales user

  After you create an individual's PeopleSoft user ID and PeopleSoft CRM person ID (and employee ID, if appropriate), select Set Up CRM, Product Related, Sales, Security and Personalization, Sales Users to define the individual as a sales user in PeopleSoft Enterprise Sales.

When you define a sales user, you assign a sales access profile. Sales access profiles group actions that are granted to sales users regarding leads, opportunities, territory management, pipeline, and forecasts. Generally, these profiles correspond to employee roles in the organization. You can assign one or more sales access profiles to each sales user.

For example, you might create an access profile of Sales Manager and enable sales users with that access profile to adjust forecasts and to view and update calendars for all staff who are visible to them on the territory tree. Another sales access profile, Sales Administrator, might enable users with that sales access profile to view and edit revenue allocations. If you associate both Sales Manager and Sales Administrator with a sales user, that user has the combined privileges of both access profiles.

A person's characteristics are based on the teams and territories with which you associate the person in your system. You can associate a sales user with:

- Teams

  Sales teams are groups of sales users who work together to sell products or services. You can associate an entire sales team with a particular lead or opportunity.

  Account teams are groups of sales users who are responsible for sales and service to specific customer accounts. A sales user is also assigned to a territory team, which is the group of sales users who are assigned to a territory.

Note. Adding or removing a sales user from a lead or opportunity does not change the territory team to which that sales user belongs; it adds or removes the user only from the sales team for that opportunity.

- Territories

  Each sales user can belong to multiple territories. Territories represent functional divisions of an organization, often identified by geographical region or product line. Assign sales users to territories on the Territory Definition page or on the Sales User - Visibility page.

Use dataset rules to restrict visibility into territory trees. To create a dataset rule against a territory tree, use views that show a flattened tree: RSF_ACC_MGR_VW to see all the people on the territory tree below a specific manager and RSF_ACC_SUSER to see the territories below a specific territory.

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Most of the data security in Sales is driven by the person ID and where the sales user is located in the territory tree. Person ID is associated with user id. This enables *View as Owner* rules where every sales representative can see the leads and opportunities they own. %PersonID is set dynamically, based on the user who is signed in, as follows: SELECT PERSON_ID FROM PSOPRALIAS WHERE OPRID = %UserID AND OPRALIASTYPE = 'PER'. You can enable *View as Manager* on one of the flattened tree views mentioned above to permit a manager to see all leads and opportunities that are owned by the employees who report to the manager.

You can initiate a search for sales users from a business process.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences," Understanding PeopleSoft Enterprise CRM Security

Appendix B, "Sales Delivered Business Processes and Web Services," page 271

Setting Up Sales Access Profiles

To set up sales access profiles, use the Sales Access Profile (RSF_ACC_PROFILE) component.

This section discusses how to set up sales access profiles.

Page Used to Set Up Sales Access Profiles

Page Name	Object Name	Navigation	Usage
Sales Access Profile	RSF_ACC_PROFILE	Set Up CRM, Product Related, Sales, Security and Personalization, Sales Access Profiles	Set up sales access profiles by creating profile roles and assigning functional user privileges to them.

Setting Up Sales Access Profiles

Access the Sales Access Profile page.

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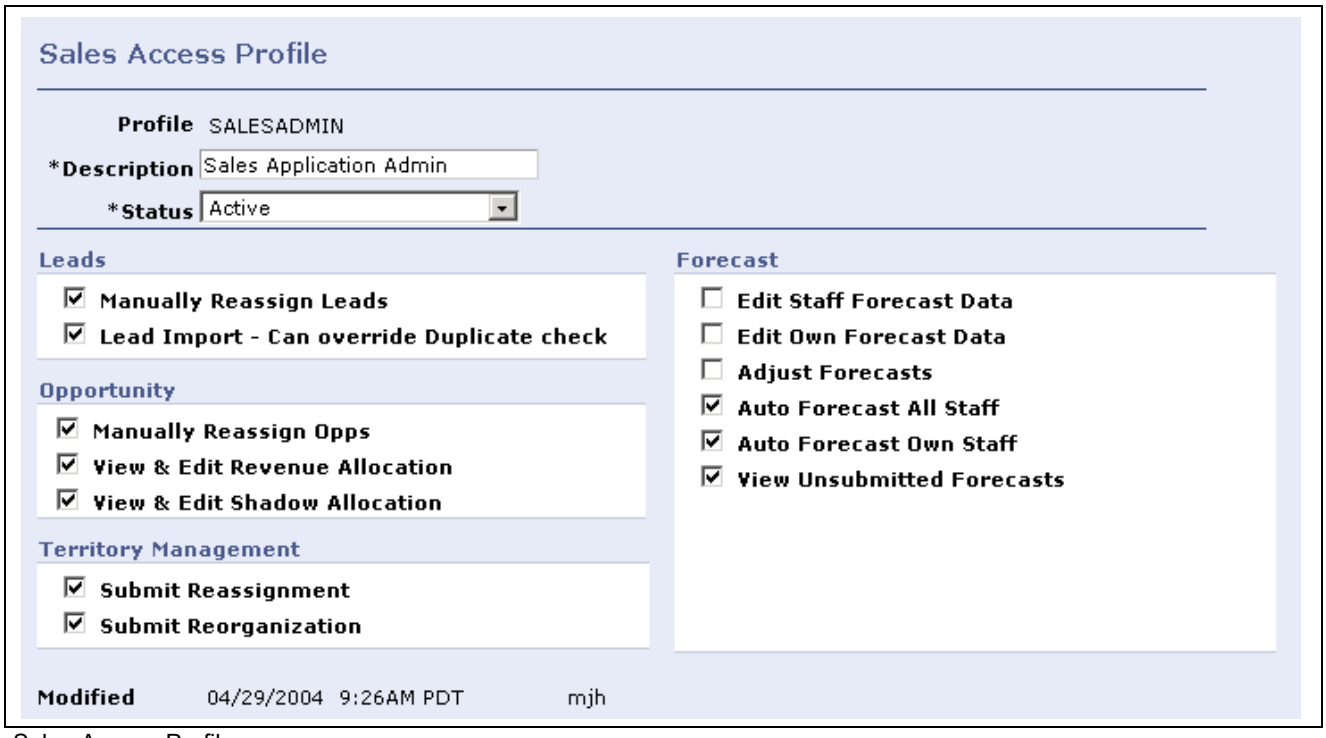

Sales Access Profile page

Create a sales access profile and select the access controls for users associated with that profile.

PeopleSoft Enterprise Sales delivers these predefined sales access profiles, which you can modify or supplement to meet your business needs:

- Financial Controller.
- Inside Sales Rep.
- Sales Lead Qualifier.
- Product Manager.
- Sales Application Admin.
- Sales Executive.
- Sales Manager w/Auto Forecast.
- Sales Manager - Limit Forecast.
- Sales User - Field Rep.
- Telemarketing Partner.

Leads

Manually Reassign Leads Select to enable the user to reassign leads to different sales representatives. If this check box is cleared, all assignment-related fields on a lead (Territory, Region, Sales Team, and so on) are unavailable to this user.

See Chapter 13, “Assigning a Lead or Opportunity,” Reassigning a Sales Representative’s Leads, Opportunities, and Accounts, page 166.

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Lead Import - Can override Duplicate check

Select to enable the user to override data when Dedup check boxes are selected on the Lead Import Template page. This permits the user to import data even if it is a duplicate.

See Chapter 12, "Importing Sales Leads," page 147.

Opportunity

Manually Reassign Opps (manually reassign opportunities)

Select to enable the user to reassign opportunities to different sales representatives.

If this check box is cleared, all assignment-related fields on an opportunity (Territory, Region, Sales Team, and so forth) are unavailable to this user.

See Chapter 13, "Assigning a Lead or Opportunity," Reassigning a Sales Representative's Leads, Opportunities, and Accounts, page 166.

View & Edit Revenue Allocation

Select to enable the user to view and edit the revenue allocation percentages that you allocate to the sales teams for an opportunity. Revenue percentage is used to allocate opportunity revenue for revenue forecasting.

See Chapter 20, "Including Opportunities in Forecasts and Closing Opportunities," Specifying Revenue Percentages for Forecasting, page 230.

View & Edit Shadow Allocation

Select to enable the user to view and edit the shadow percentages and shadow amounts that you allocate to individual members of the sales team for an opportunity. Shadow percentage and allocation are used to allocate opportunity revenue for shadow forecasting.

See Chapter 20, "Including Opportunities in Forecasts and Closing Opportunities," Specifying Revenue Percentages for Forecasting, page 230.

Territory Management

Submit Reassignment

Select to enable the user to modify the system's automated reassignment of leads or opportunities during the tree reorganization process.

See Chapter 9, "Reorganizing or Deleting a Territory Tree," Reorganizing a Territory Tree, page 104.

Submit Reorganization

Select to enable the user to reorganize territories and people on any of the organization's territory trees.

See Chapter 9, "Reorganizing or Deleting a Territory Tree," Reorganizing a Territory Tree, page 104.

Forecast

Edit Staff Forecast Data

Select to enable the user to edit forecast data for all staff that are visible to the user on any of the organization's territory trees.

See Chapter 22, "Using Forecasts," Managing Forecasts, page 249.

Edit Own Forecast Data

Select to enable the user to edit his or her own forecast data. Edit activity overwrites existing data.

See Chapter 22, "Using Forecasts," Adding and Adjusting Forecasts, page 244.

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Adjust Forecasts	Select to enable the user to add rows to adjust a forecast. Adjustment activity remains visible. See Chapter 22, "Using Forecasts," Adding and Adjusting Forecasts, page 244.
Auto Forecast All Staff	Select to enable the user to autogenerate forecasts at any time for all staff. See Chapter 22, "Using Forecasts," Generating Forecasts Automatically, page 248.
Auto Forecast Own Staff	Select to enable the user to autogenerate forecasts at any time for the user and all persons who fall below the viewer on a tree. See Chapter 22, "Using Forecasts," Generating Forecasts Automatically, page 248.
View Unsubmitted Forecasts	Select to enable the user to view forecasts that have been saved but not submitted for all staff that are visible to the user.

Setting Up Sales Users

To set up sales users, use the Sales Users (RSF_SUSER) component.

This section discusses how to:

- Create a sales user.
- Define a sales user's visibility.
- Define a sales user's pipeline targets.
- Define a sales user's revenue quotas.
- Define a sales user's product unit quotas.

Note. Before you can set up an individual as a sales user, the individual must exist as a PeopleSoft user with a user ID in PeopleTools and as a PeopleSoft CRM contact with a person ID.

See *Enterprise PeopleTools PeopleBook: PeopleTools Security.*

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Person Business Objects," Defining Information for Business Contacts.

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Pages Used to Set Up Sales Users

Page Name	Object Name	Navigation	Usage
Sales User	RSF_SUSER1	Set Up CRM, Product Related, Sales, Security and Personalization, Sales Users, Sales User	Create a sales user by defining defaults and associating sales and account access profiles with the user.
Sales Access Details	RSF_SUSER_ACC_SEC	Click the Sales Access Details link on the Sales User page.	View details of the selected sales access profile to determine whether it is the appropriate profile to assign.
Account Access Details	RSF_SUSER_CUST_SEC	Click the Account Access Details link on the Sales User page.	View details of the selected account access profile to determine whether it is the appropriate profile to assign.
Person (Business Contact), Worker,	RD_PRSN_PRIMARY	• Click the Address, Phone, Email details link on the Sales User page. • Customers CRM, Search Person, Person (Business Contact) • Workforce, Search Worker, Worker	Enter an employee's worker data, including address, phone, and email information.
Visibility	RSF_SUSER2	Set Up CRM, Product Related, Sales, Security and Personalization, Sales Users, Visibility	Define a sales user's visibility by identifying territories to which an individual has access.
Pipeline Targets	RSF_SUSER_QS	Set Up CRM, Product Related, Sales, Security and Personalization, Sales Users, Pipeline Targets	Define a sales user's pipeline targets.
Revenue Quota	RSF_SUSER_QR	Set Up CRM, Product Related, Sales, Security and Personalization, Sales Users, Revenue Quota	Define a sales user's quotas including both revenue and shadow.
Unit Quota	RSF_SUSER_QU	Set Up CRM, Product Related, Sales, Security and Personalization, Sales Users, Unit Quota	Define a sales user's product unit quotas.

Creating a Sales User

Access the Sales User page.

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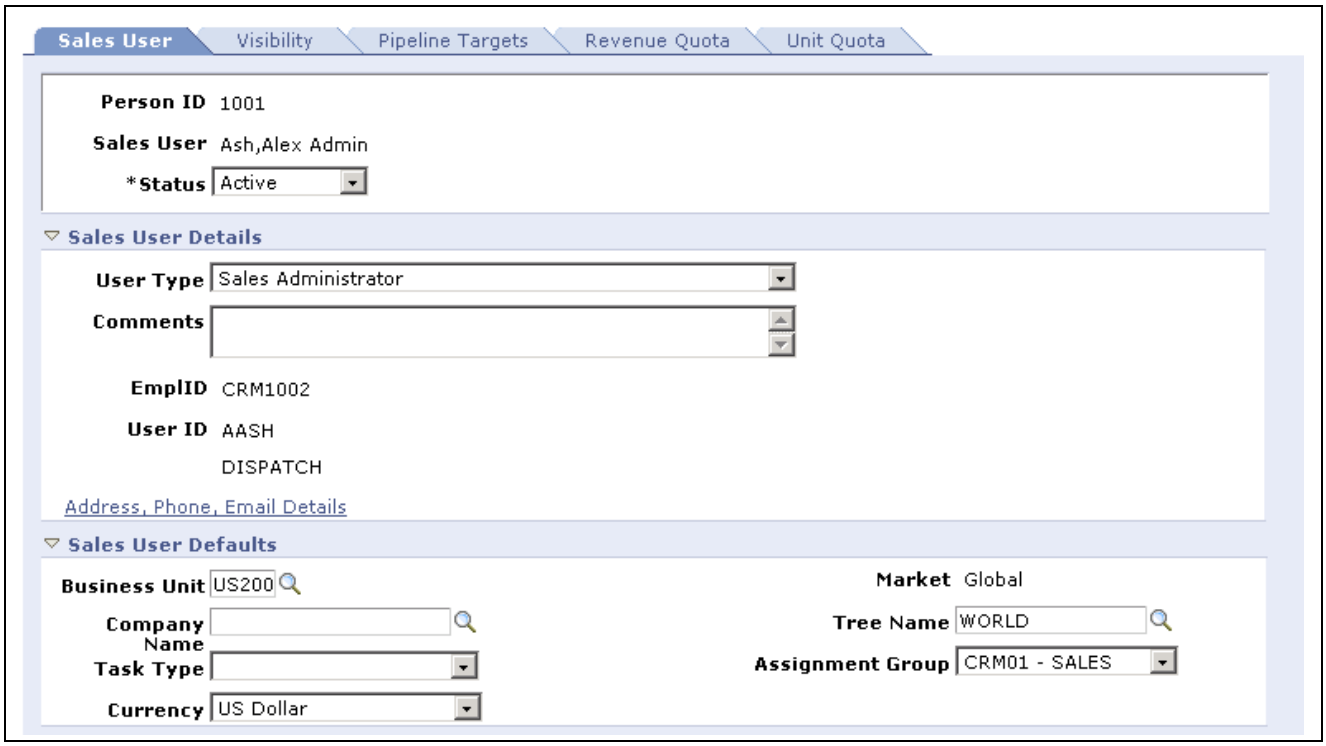

Sales User page (1 of 2)

Sales User page (2 of 2)

Person ID Displays the person ID of the sales user.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Person Business Objects," Defining Information for Business Contacts.

Sales User Details

User Type Select the type of sales user to create. Values are *Executive Sales Manager, Field Sales Rep, Inside Sales Rep, Pre-Sales Consultant, Sales Administrator, Sales Manager, Sales Tech Support,* and *Telesales Rep.*

Sales user types are translate values.

EmplID (employee ID) Displays the employee ID from the Worker page, if the individual is an employee.

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User ID Displays the user ID with which the individual is associated in PeopleTools.

Address, Phone, Email Details Click to access the Worker page, where you can view an individual's personal and employee contact data.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Workers".

Sales User Defaults

If a sales user is associated with multiple values for items in this section, the system displays the default value that you specify here and provides a drop-down list box (or a similar page control) with the sales user's other values.

Business Unit Enter the business unit for the leads and opportunities that the sales user creates. The business unit controls the setID, customers, and products to which the sales user has access.

Company Name Enter the name of the company whose accounts the sales user handles or with which the sales user is most often associated.

Task Type Select the type of task with which the sales user is most often associated.

Currency Select the currency in which to express revenues for the sales user.

Market By default, this field is set to *Global* for all sales users. You cannot change this value.

Tree Name Enter the default tree to use for the sales user. If you do not enter a default tree here, when a tree name is needed, the system uses the tree that is associated with the specified business unit on the Sales Definition page.

Assignment Group Select the assignment group to use for the sales user.

See Chapter 7, "Configuring Assignment Criteria," Creating Assignment Groups, page 86.

Sales Access Profiles

Profile Select a sales access profile to provide functional sales abilities for the sales user and to control the sales data that the sales user can view and modify. Set up sales access profiles on the Sales Access Profile page.

See Chapter 4, "Setting Up Sales Security and Personalization," Setting Up Sales Access Profiles, page 15.

Sales Access Details Click to access the Sales Access Details page.

Shadow Information

Default Shadow Percent and **Default Shadow Amount** Enter the percentage or amount to use as the allocation for the sales user. For example, suppose that an agreement specifies that the sales user earns a minimum 2 percent on all revenues that the user generates. In that case, you would enter *2* in the Default Shadow Percent field. If the agreement specifies that the sales user earns a minimum of 100.00 USD for each opportunity, then enter *100* in the Default Shadow Amount field.

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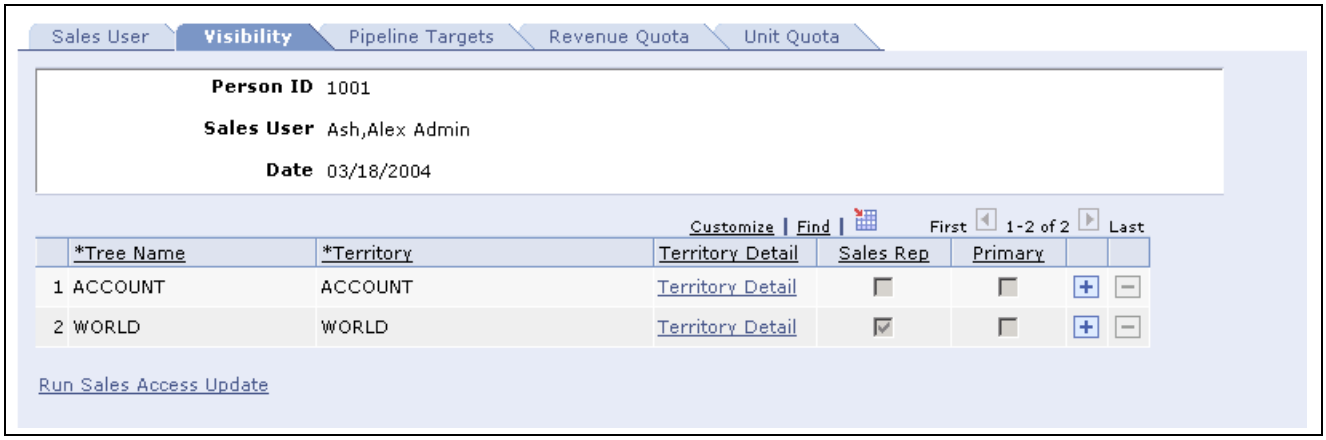
Managers can override the default percentage or amount at the transaction level.

See Also

Chapter 21, "Understanding Sales Forecasts," page 237

Defining a Sales User's Visibility

Access the Visibility page.



Visibility page

Tree Name and **Territory** — Displays the trees and territories to which the sales user has access and on which the sales user is a territory team member. Click the button with the plus sign to insert a row and add another tree or territory. You can click the button with the minus sign to delete the row before you save the page. After you save the page, the button with the minus sign is no longer available.

Territory Detail — Click to access the Territory Definitions page, where you can view information about the territory and click the button with the minus sign to remove the sales user from the territory team.

When you click OK, the system returns you to the Visibility page for the same sales user. The row for the removed territory no longer appears.

Sales Rep (sales representative) — Indicates that the sales user is a sales representative (as opposed to a partner, worker, or other position) and is available for territory assignment.

Primary — Indicates that the sales user is the primary sales representative for the territory.

Run Sales Access Update — Click to access the Sales Access Update page, where you can update sales users and their access.

Note. Each time that you create a sales user or change a user's visibility settings, you must run the Sales Access Update process to apply the changes.

Defining a Sales User's Pipeline Targets

Access the Pipeline Targets page.

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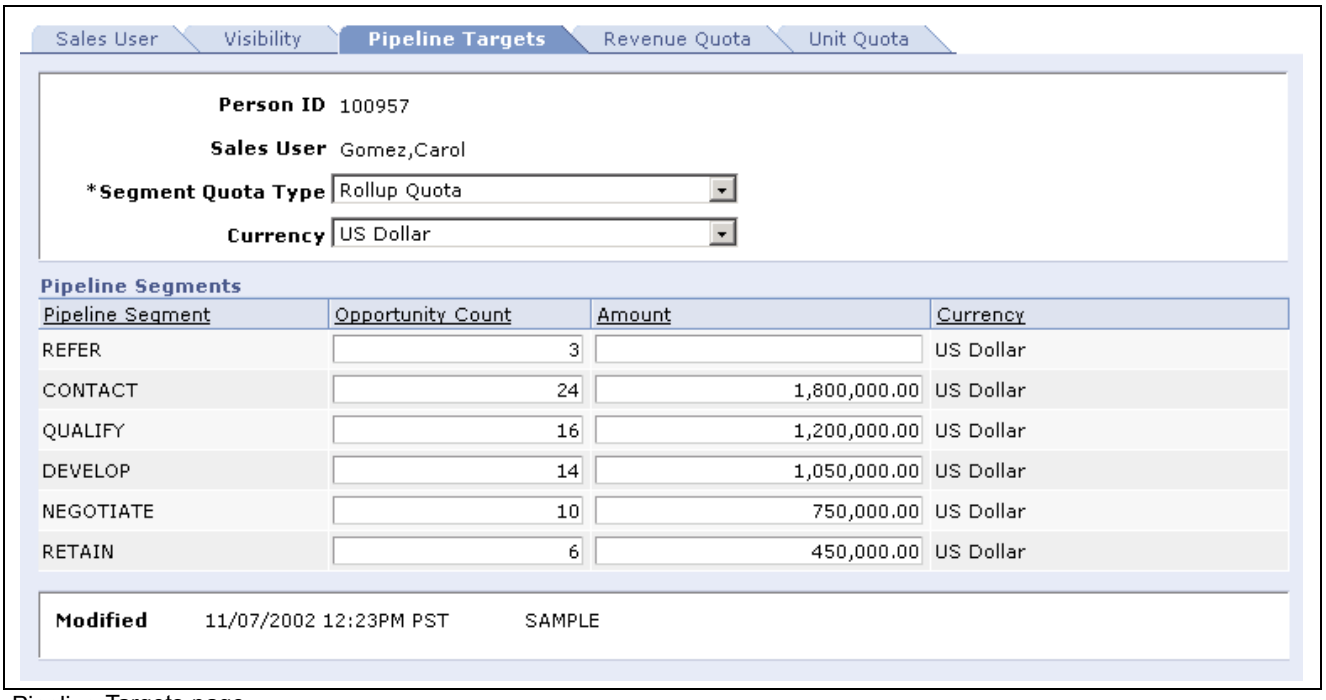

Pipeline Targets page

Pipelines compare real-time activities to the activity that is required to meet a quota. A pipeline includes segments that correlate to steps in your organization's sales process. In the example, the pipeline segments correlate to the steps in the PeopleSoft Knowledge-Enabled Sales (KES) process: Contact, Qualify, Develop, Negotiate, and Retain.

Use this page to specify the targets that the sales user must reach for each segment to meet the overall quota.

Segment Quota Type Select the type of quota to use for the sales user's pipeline segments. Values are:

Manager Quota: The manager's own quota.

Rollup Quota: The sum of quotas for all sales representatives who report to the manager.

Quota information is used in pipeline as well as in forecasting

Currency Displays the currency that you specified on the Sales User page. You can specify a different currency in which to express pipeline amounts.

Pipeline Segment Displays the pipeline segments that correlate to your sales process.

Opportunity Count and **Amount** Enter the number of opportunities that the sales user must have within this segment to meet quota for the pipeline segment. Enter the monetary amount required to meet quota for the segment. A segment can have an opportunity count, a monetary amount, or both.

For example, if the sales user must have a minimum of five opportunities in the Contact step of the process at any given time, then enter *5* in the Opportunity Count field. Typically, you do not use a monetary amount for this segment. However, for the Negotiate step, you might require an opportunity count of *10* or a monetary amount of *50,000* (to indicate $50,000) to meet quota for this step.

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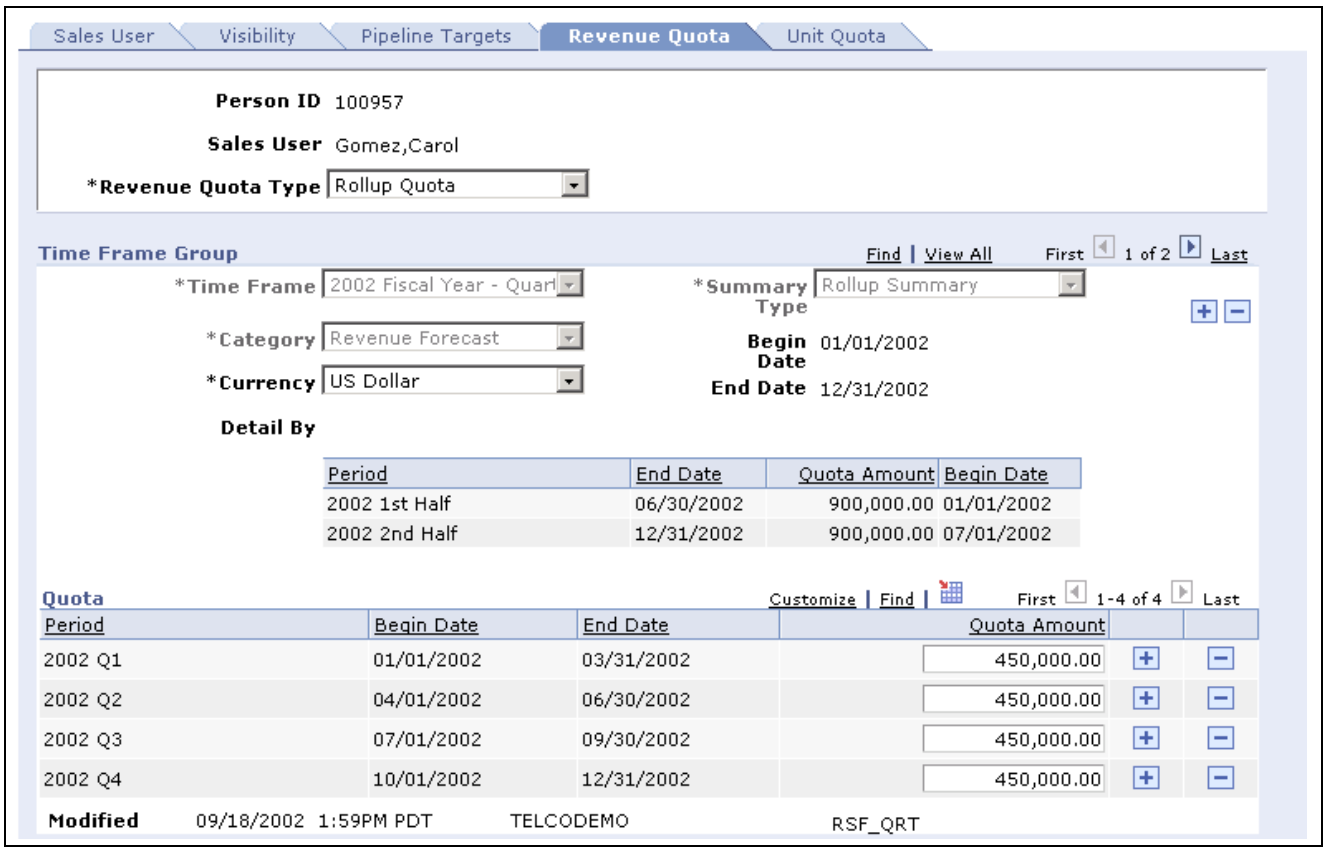
Defining a Sales User's Revenue Quotas

Access the Revenue Quota page.



Revenue Quota page

Revenue quotas specify how much revenue the sales user must generate for the division or the overall enterprise.

Revenue Quota Type

Select the type of quota to use for the sales user's revenue quota. Values are:

Manager Quota: The manager's own quota.

Rollup Quota: The sum of quotas for all sales representatives who report to the manager.

Quota information is used in pipeline as well as in forecasting

Time Frame

Select the time frame in which the sales user must meet the revenue quota.

Category

Select the forecast category, either *Revenue Forecast* or *Shadow Forecast,* for calculating the quota.

Detail By

Displays the criteria used to define the quotas, if the time frame has been established to define detail quotas.

For example, if you established the time frame to define detail quotas by revenue type, then *Revenue Type* appears here, and you can enter the quotas by time frame period and revenue type.

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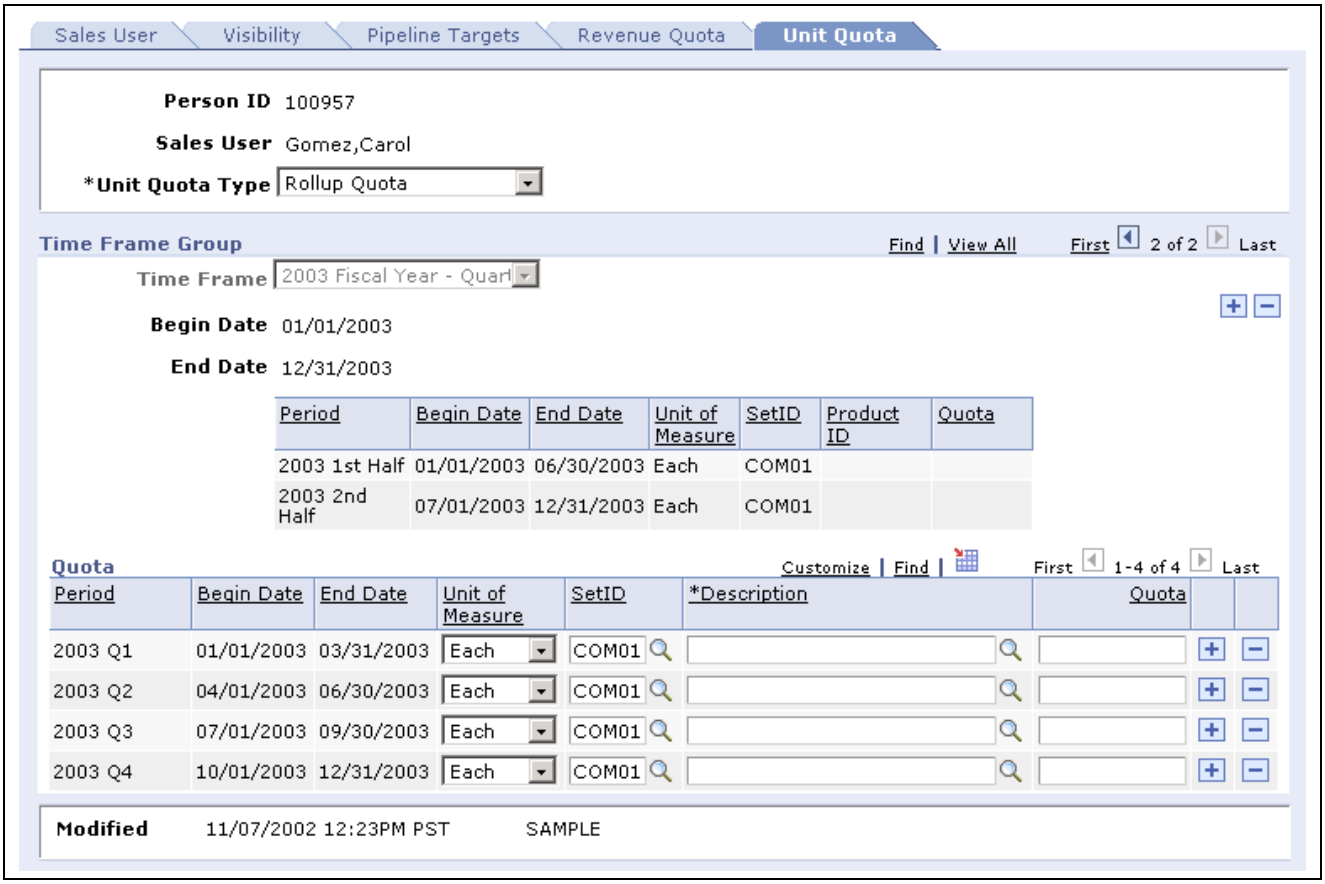
Defining a Sales User's Unit Quotas

Access the Unit Quota page.



Unit Quota page

Unit quotas specify how many products the sales user must sell.

Unit Quota Type Select the type of quota to use for the sales user's unit quota. Values are:

Manager Quota: The manager's own quota.

Rollup Quota: The sum of quotas for all sales representatives who report to the manager.

Quota information is used in pipeline as well as in forecasting

Time Frame Select the time frame in which the sales user must meet the unit quota.

Setting Up Sales Teams

To set up sales teams, use the Sales Team (RSF_TEAM) and Account Team Options components.

This section provides an overview of team types and discusses how to set up sales teams.

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Understanding Team Types

In PeopleSoft Enterprise Sales, there are four types of teams: sales teams, territory teams, account teams, and lead or opportunity teams.

The sales team, which you create here, is the group of sales users who typically work together and can be assigned to a specific lead or opportunity, as a whole team or individually.

The territory team is the group of sales users who are assigned to the same territory on the territory tree.

The account team is the group of sales users who are assigned responsibility for specific customer accounts.

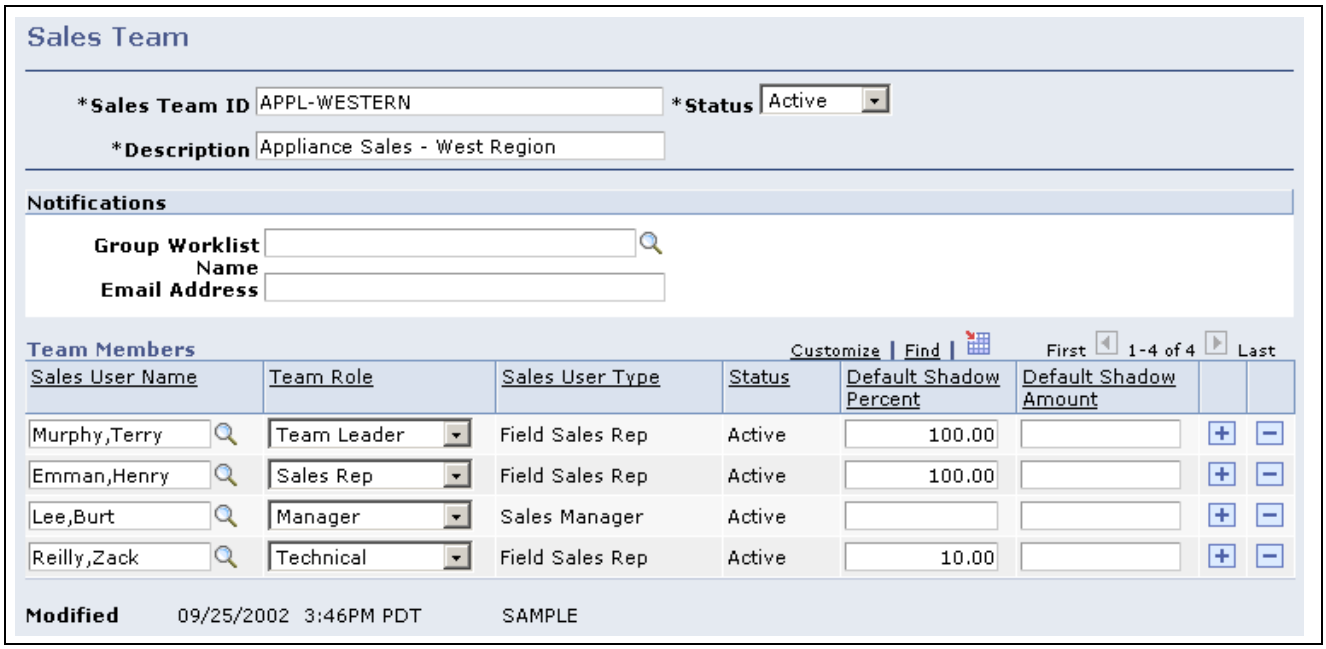
The lead or opportunity team is assigned to a specific lead or opportunity. This team can consist of any combination of members of the territory teams, sales teams, and account teams.

Page Used to Set Up Sales Teams

Page Name	Object Name	Navigation	Usage
Sales Team	RSF_TEAM	Set Up CRM, Product Related, Sales, Security and Personalization, Sales Team	Set up sales teams.

Setting Up Sales Teams

Access the Sales Team page.



Sales Team page

On the Sales Team page, you can select existing sales teams and sales team members to assign sales users to the lead or opportunity. After you add a sales team here, you can remove individuals from the lead or opportunity without removing them from the sales team.

Sales Team ID Enter an ID for the sales team. This ID should be unique and easily recognizable. Often, it is useful to include the name of the team manager and the business unit.

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Notifications

Group Worklist Name Enter the worklist that is relevant to the sales team that you are creating. Notifications that are triggered by workflow are sent to the worklists that are specified on the workflow event.

Email Address Enter the email address to which email messages for the team are sent.

Team Members

Sales User Name and **Sales User Type** Enter the name of the sales user to assign to the sales team. When you do so, the system displays the type of sales user from the individual's Sales User page.

See Chapter 4, "Setting Up Sales Security and Personalization," Creating a Sales User, page 19.

Team Role Select the individual's role on the sales team. Values include *Consultant, Legal, Manager,* and *Field Rep.*

See Chapter 4, "Setting Up Sales Security and Personalization," Creating a Sales User, page 19.

Default Shadow Percent and **Default Shadow Amount** Displays the individual's default shadow percentage and default shadow amount from the Sales User page.

See Chapter 4, "Setting Up Sales Security and Personalization," Creating a Sales User, page 19.

Setting Up Functional Options

PeopleSoft Enterprise Sales uses the PeopleSoft CRM application security framework to control functional access to particular fields, sections, and actions within the Lead and Opportunity components. Functional options define the functions that can be carried out by members of a membership list, such as sales representatives or sales managers. Functional options are grouped into functional option groups that are similar to sales access profiles. You associate a functional option group with a membership list that contains a list of PeopleTools roles. This creates a security profile. Unlike sales access profiles, functional option groups are associated with one or more PeopleTools roles. Sales access profiles are assigned to individual people.

You can set up functional options, functional option groups, membership lists, and security profiles in PeopleSoft CRM application security.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up Security and User Preferences," Defining Application Security.

Some of the functional options for PeopleSoft Enterprise Sales are linked to fields or sections in the Lead and Opportunity components. Display templates determine how the system displays the fields and sections.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates," Configuring Display Templates for Components.

This table lists the functional options available for PeopleSoft Enterprise Sales:

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Functional Option	Default and Revoked Settings
CORE_RSF_ADVANCED	Default setting: When the user enters a lead or opportunity, the system shows all the fields, sections, and tabs that are marked as controlled by display template security. Revoked setting: When the user enters a lead or opportunity, the system hides the fields, sections, and tabs that are marked as controlled by display template security. If you use this setting and the delivered display templates for leads and opportunities, the system displays the basic fields necessary for entering leads and opportunities. You can set up display template security in the Display Template Details component. See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Display Templates for Leads and Opportunities, page 69.
CORE_RSF_AUTO_ASSIGN_OFF	Default setting: When the user saves a lead or opportunity, the system does not automatically assign a sales representative to the lead or opportunity. Revoked setting: When the user saves a lead or opportunity, the system automatically assigns a sales representative to the lead or opportunity by using assignment criteria.
CORE_RSF_DEFAULT_OWNER	Default setting: When a user creates a new lead or opportunity, the system adds the user who creates the lead or opportunity to the Sales Team Member section as the primary sales representative. Revoked setting: When a user creates a new lead or opportunity, the system does not add a sales representative to the Sales Team Member section.
CORE_RSF_FCAST_ROLLUP	Default setting: The default value for the Forecast View field on the Forecast page in the Search Forecasts component is *Manager Review*. This is the view that sales managers use to roll up and analyze forecasts. Revoked setting: The default value for the field is *Subtotals*. This reduces load time and may be preferable for second-level and higher-level managers. See Chapter 22, "Using Forecasts," Managing Forecasts, page 249.
CORE_RSF_FCAST_SIMPLE	Default setting: The user has access to all views on the Forecast page in the Search Forecasts component. Revoked setting: The user has access to only the following views on the Forecast page in the Search Forecasts component: Combined Forecasts, Manager Review, and Subtotals.

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Functional Option	Default and Revoked Settings
CORE_RSF_SEARCH_PRODUCT_GROUP	Default setting: The system displays the product group search option in the Lead and Opportunity components. Revoked setting: The system does not display the product group search option in the Lead and Opportunity components.
CORE_RSF_SHOW_SITE	Default setting: The system displays the site field and search on the Discover page of the Lead and Opportunity components. Revoked setting: The system does not display the site field and search on the Discover page of the Lead and Opportunity components.
CORE_RSF_SUMMARY	Default setting: The system displays the summary page in the Lead and Opportunity components. Revoked setting: The system does not display the summary page in the Lead and Opportunity components.

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CHAPTER 5

Setting Up Sales Leads and Opportunities

This chapter discusses how to:

- Set up a sales process.
- Set up component field default values.
- Set up lead ratings.
- Set up assignment weights.
- Set up lead reject and turnback reasons.
- Set up sales contacts.
- Set up sales partners.
- Set up sales competitors.
- Set up buying criteria.
- Set up lead sources.
- Set up fallout reasons.
- Set up pipeline segments.
- Set up templates for importing leads.
- Set up the summary page for leads and opportunities.
- Set up display templates for leads and opportunities.

Setting Up a Sales Process

To set up a sales process, use the Sales Process (RSF_SALES_MODEL) component.

This section provides an overview of the sales process and discusses how to:

- Define a process.
- Clone a process.

Understanding the Sales Process

Sales efforts typically follow a defined series of stages and tasks. PeopleSoft Enterprise Sales provides the Knowledge Enabled Sales (KES) process, a ready-to-use proprietary sales process that enables you to identify the stages and tasks that an organization's sales process requires. The KES process can also help sales representatives learn how to perform tasks using the organization's best practices.

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The KES process includes several stages. Each stage is associated with an opportunity pipeline segment, and every stage includes one or more tasks. You can use the KES process that is provided or you can define sales stages and tasks based on your organization's preferred sales model.

Note that you can enable multiple sales processes at one time. For example, you might have one process for selling within a particular industry and another for selling a particular product or service line. You can relate all the various stages to common pipeline segments to ensure that you analyze pipeline information correctly.

This table lists the KES stages and their tasks. You can modify these stages and tasks to meet your business needs.

Note. The weights included in this table are provided as an example of how the KES process works.

Stage	Weight	Purpose	Task
Discover	10	Identify and review knowledge about the customer, industry, and competitors before making the initial sales call in the Qualify stage.	Complete these tasks during the Discover stage: 1. Review lead information. 2. Review opportunity information. 3. Review customer information. 4. Review customer contacts. 5. Review industry briefing. 6. Review customer briefing. 7. Perform customer research to identify recent news releases or financial statements that are pertinent to the customer. 8. Review competitor briefing.
Qualify	20	• Align the customer's buying process with the sales process based on information obtained during the initial sales call. • Identify the customer's needs. • Identify the decision makers, influences, and competitive landscape.	Complete these tasks during the Qualify stage: 1. Plan initial sales call. 2. Conduct initial sales call. 3. Update opportunity information. 4. Update customer information. 5. Assemble customer's buying team. 6. Assemble sales team. 7. Follow up on initial sales call. 8. Update competitor information. 9. Document customer's needs. 10. Create opportunity plan (needs analysis, product research, follow-up calls, and so on) and assign tasks to move the opportunity to the Develop Solution stage.

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Stage	Weight	Purpose	Task
Develop Solution	20	Define a set of products or services to meet the customer's needs and preferences, and obtain a quote for these products or services.	Complete these tasks during the Develop Solution stage: 1. Define solution. 2. Configure and quote solution. 3. Review solution with sales team. 4. Review solution with customer. 5. Finalize solution based on feedback from sales team and customer.
Develop Proposal	20	Create a comprehensive written proposal that identifies how the proposed solution addresses the customer's needs. The proposal includes the quote itself, product descriptions, support policies, and legal information such as warranties.	Complete these tasks during the Develop Proposal stage: 1. Update opportunity information. 2. Generate proposal based on the quoted solution. 3. Redefine proposal, if necessary. 4. Review proposal with sales team. 5. Refine and finalize proposal based on feedback from sales team. 6. Submit written proposal to customer and update the status.
Negotiate and Close	20	Discuss the written proposal with the customer and negotiate terms and conditions to win the business.	Complete these tasks during the Negotiate and Close stage: 1. Review negotiation strategies in preparation for meeting with the customer. 2. Conduct negotiation meeting to win the business. 3. Complete legal contracts. 4. Summarize the opportunity outcome, update the status, and identify why the opportunity was won or lost.
Retain	10	Prepare a plan to manage the customer relationship after closing the opportunity.	Complete these tasks during the Retain stage: 1. Update solution based on opportunity outcome. 2. Update customer information, including new contacts for implementation and ongoing customer relationship. 3. Prepare relationship plan. 4. Conduct relationship meeting to discuss relationship plan.

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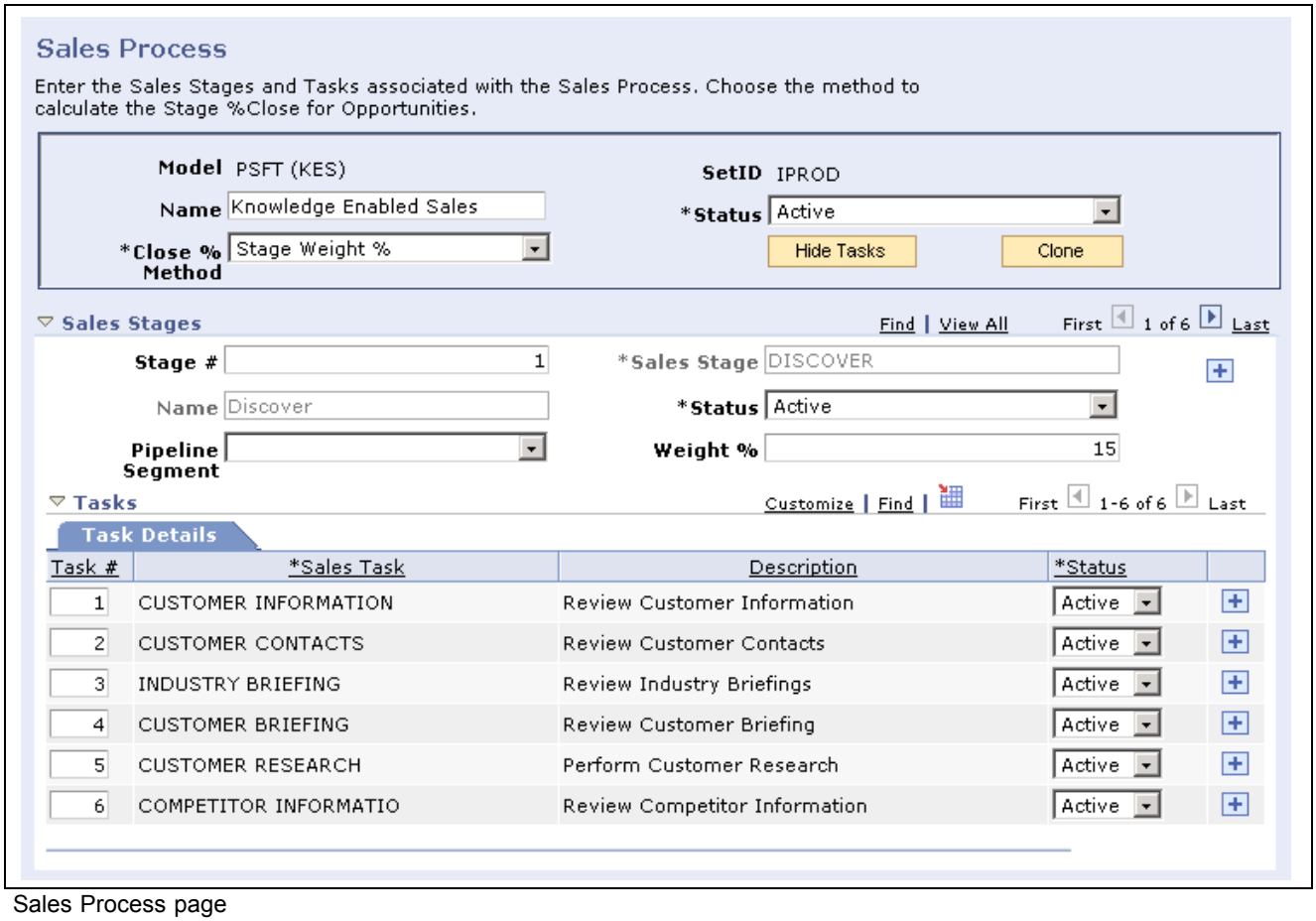
Pages Used to Set Up a Sales Process

Page Name	Object Name	Navigation	Usage
Sales Process	RSF_SALES_MODEL	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Process	Review the KES stages and tasks that make up the sales process delivered with the PeopleSoft system. Define other stages or tasks as necessary.
Clone Sales Process	RSF_SLSPRCS_CLONE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Process Click Clone on the Sales Process page.	Copy an existing sales process to use as the basis for a new process.

Defining a Process

Access the Sales Process page.



Sales Process page

Model and **Name** Displays *PSFT (KES)* and *Knowledge Enabled Sales* as the default values if you use the KES process. If you use a different sales process, the process and name appear. You can edit the name on this page.

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Close % Method (close percentage method)

Select a method for evaluating the progress of opportunities; 100% equals closed or completed. Values are:

- *Stage Weight %:* Expresses progress as a percentage of the weighted stages that are completed.

  For example, suppose that your sales model consists of three stages and you assign a weight of 50% to the first stage and 25% each to the second and third stages. When you complete the first two stages, the system calculates that you have completed 75% of the sales model.

- *Stage Level:* Expresses progress as a simple percentage of the stages completed.

  For example, suppose that your sales model consists of four stages. When you complete the first two stages, the system calculates that you have completed 50% of the sales model.

- *Task Type:* Expresses progress as a simple percentage of tasks completed.

  For example, suppose that your sales model consists of eight tasks. When you complete the first six tasks, the system calculates that you have completed 75% of the sales model.

Hide Tasks and **Show Tasks**

Click to hide or display tasks. If you use tasks associated with your sales process, display them. Otherwise, hide the tasks that appear here.

Clone

Click to access the Clone Sales Process page, where you can copy or clone the sales process to a different setID. You can clone the stages and tasks of the process.

Stage # (stage number) and **Sales Stage**

Displays the sequence number and stage of the process, and lists the associated tasks at the bottom of the page.

Click the Add button to create additional stages of the process and associate tasks with them. The system enters the stage sequence number. You can override the sequence numbers to reorder the stages.

Pipeline Segment

Identify the pipeline segment to associate with the stage.

In the KES process, pipeline segments include *Contact, Develop, Negotiate, Qualify,* and *Retain.* You must specify a pipeline segment to correlate with the stage if you set up pipeline targets for a sales user's pipeline segment quotas on the Sales User page.

See Chapter 4, "Setting Up Sales Security and Personalization," Defining a Sales User's Pipeline Targets, page 22.

Weight % (weight percentage)

Enter the weight percentage that represents that stage's portion of the sales model.

For example, if a stage represents half of the sales model, half of the work, half of the time, half of the important landmarks, or half of some other measure, then enter *50* (percent).

Tasks

Task # (task number) and **Sales Task**

Displays the sequence number and name of the discrete activity that runs as part of a sales stage.

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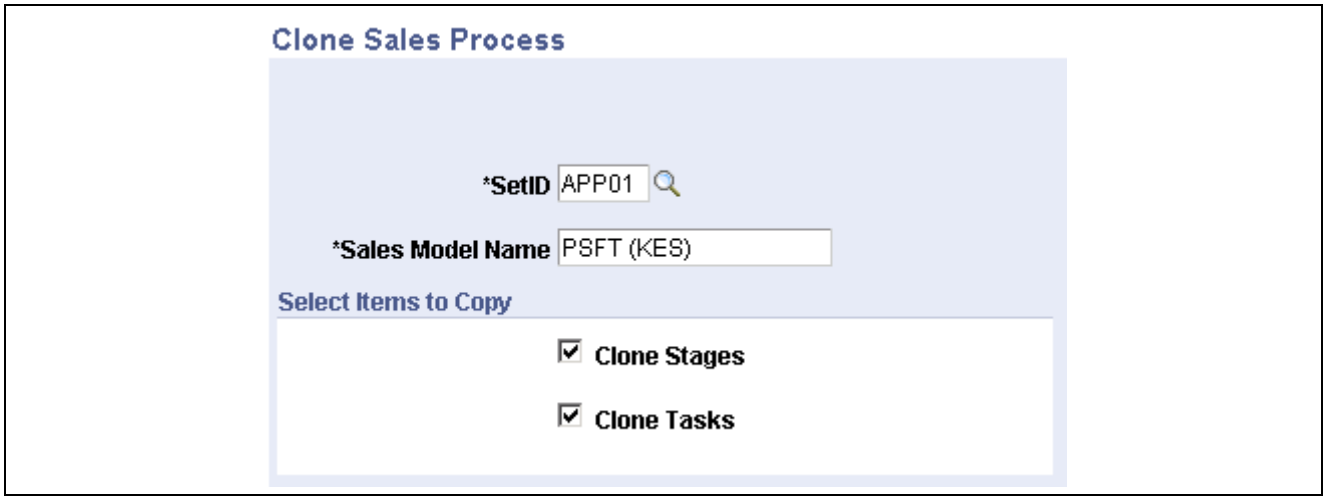
The system enters the sequence number when you add a task. You can override sequence numbers to reorder the tasks.

Cloning a Process

Access the Clone Sales Process page.



Clone Sales Process page

You can copy (or *clone*) an existing process with its stages and tasks and then make adjustments to create a new process.

Setting Up Component Field Default Values

When a sales user creates a lead or opportunity, the lead or opportunity description is a required field. The user can enter a description to identify the lead or opportunity. However, if the user does not enter a description and saves the lead or opportunity, the system saves a default value for the description based on a combination of fields set up on the Component Field Default page.

PeopleSoft Enterprise Sales delivers two default settings for component fields—one for the lead description and one for the opportunity description. These settings specify that the system populates the lead and opportunity descriptions with the name of the customer if the sales user does not enter a description. You can change these default settings by using the Component Field Default page.

Page Used to Set Up Component Field Default Values

Page Name	Object Name	Navigation	Usage
Component Field Default	RB_COMP_FLD_DFLT	Set Up CRM, Common Definitions, Component Configuration, Component Field Default	Set up default values for required fields.

Setting Up Default Values for Component Fields

Access the Component Field Default page.

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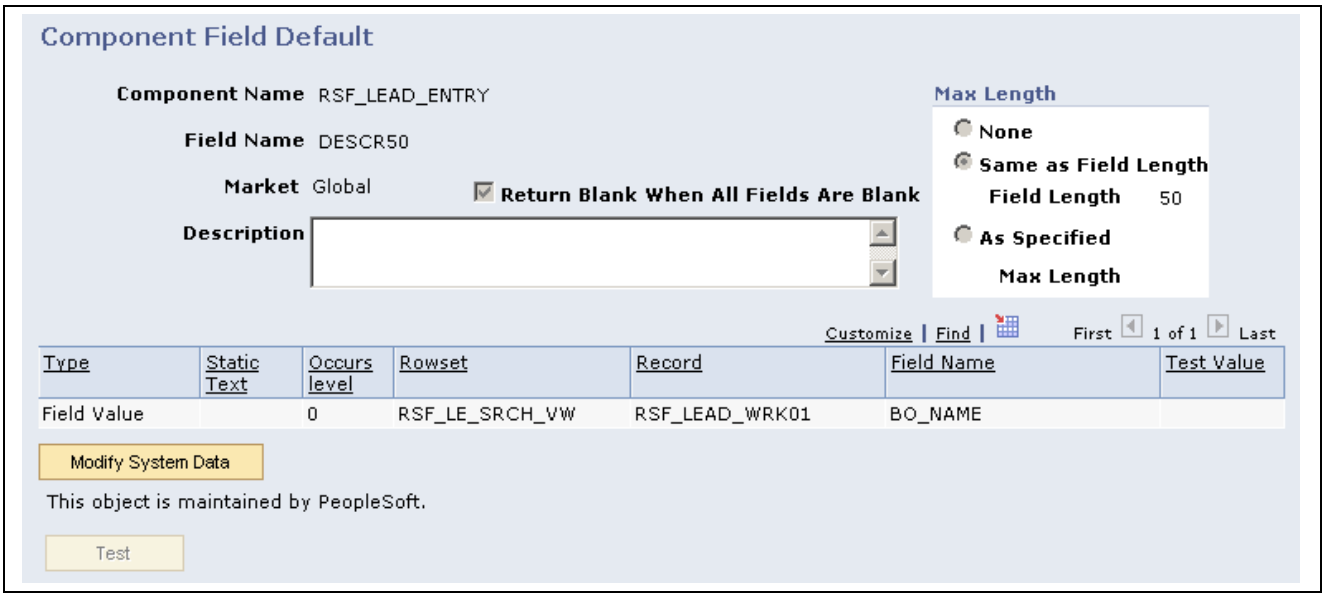

Component Field Default page

Select *RSF_LEAD_ENTRY* and *DESCR50* for the component name and field name, respectively, to modify the settings for the lead description. Select *RSF_OPPORTUNITY* and *OPPORTUNITY_NAME* to modify the settings for the opportunity description.

Click the Modify System Data button to edit the fields on the Component Field Default page.

If you enter multiple rows, the system concatenates the values from the rows to form the default value.

Return Blank When All Fields Are Blank Select this check box to have the system leave the field blank when all the fields in the criteria grid are blank for the transaction.

Max Length (maximum length) Select a value for the maximum character length of the default value. Values are *None, Same as Field Length,* and *As Specified.* If you select *As Specified,* enter a value in the Max Length field.

Type Values are *Field Value, Blank Space,* and *Static Text.* If you select *Field Value,* you must enter the rowset, record, and field name.

Occurs level Enter the level at which the field is located.

Rowset Enter the name of the rowset that contains the field.

Record Select the record that contains the field name that you use to populate the Description field.

Field Name Select the field name that you use to populate the Description field.

Test Value If you select *Field Value* for the type, enter a typical value in this field for testing purposes. Click the Test button to view a potential name. The system retrieves the actual value based on the field during live input.

Test Click this button to display the projected lead or opportunity default value, which appears to the right of the button. If you have multiple rows, the system concatenates the values from the rows.

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Setting Up Lead Ratings

This section provides an overview of ratings and rating rules and discusses how to:

- Define lead ratings and set workflow triggers.
- Set up lead rating rules.
- Build conditions for rating rules.
- Choose conditions to evaluate.
- Map survey values to lead ratings.

To set up lead ratings, use the Lead Ratings (RSF_LEAD_RATING) and Lead Rating by Rate Set Value (RT_RS_TO_LEAD_RATE) components.

Understanding Ratings and Rating Rules

Lead ratings assess the probability that a customer will buy and are usually represented by a term that describes temperature, such as *Hot, Warm,* or *Cold.* For leads generated through telemarketing, scripted questions and answers provide the information that is used to provide lead ratings. Lead ratings apply to a setID.

For leads that are automatically generated from marketing campaigns, you can automatically generate an initial lead rating from the information gathered by marketing: customer name, potential revenue, geographic region, and so forth. You select relevant information and set up rules that automatically evaluate leads that are generated from marketing campaigns. Rating rules, like ratings, are unique for a setID and are built using the Active Analytics Framework (AAF) in the context of lead management.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework," Understanding AAF

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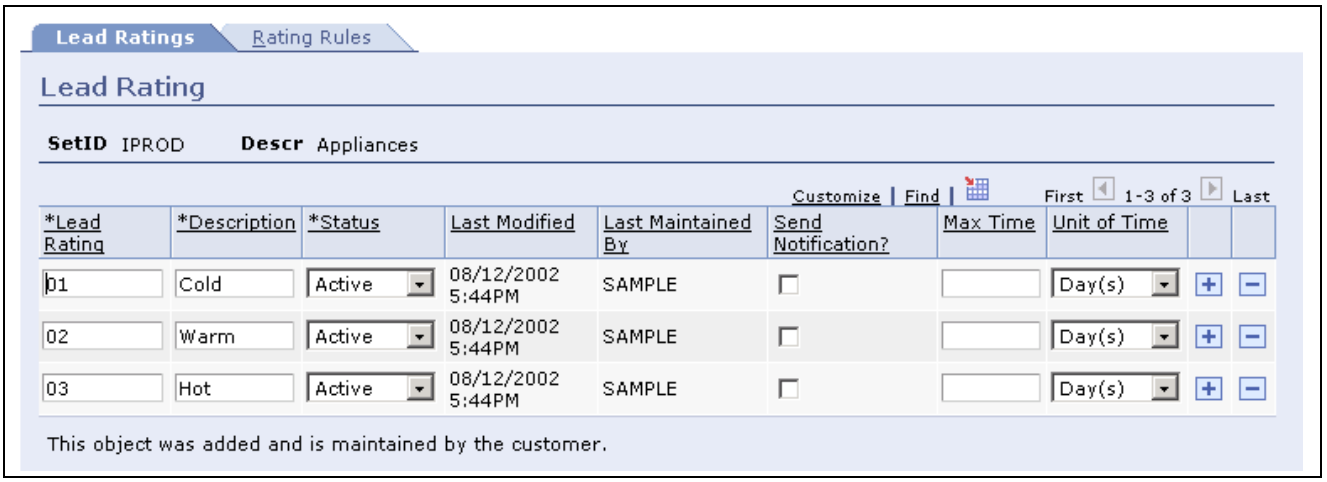
Pages Used to Set Up Lead Ratings

Page Name	Object Name	Navigation	Usage
Lead Rating	RSF_LEAD_RATING	Set Up CRM, Product Related, Sales, Lead and Opportunity, Lead Ratings, Lead Rating	Define ratings, also called *temperatures*, that identify the potential of a lead for becoming a sale, and set parameters for triggering workflow. The system sends notifications when a lead or opportunity is not accepted or rejected within a specified time period. Lead ratings are keyed by setID,
Rating Rules	RSF_RATING_RULES	Set Up CRM, Product Related, Sales, Lead and Opportunity, Lead Ratings, Rating Rules	Set up the conditions for assigning a rating to a lead. Lead rating rules are associated to a setID.
Edit Rules	RSF_CND_BLD_PG	Click the Add Rule button or the button on the Rating Rules page.	Build rating rules.
Edit Condition	RSF_SALE_TERM_PG	Click the Select Term link on the Edit Rules page.	Choose a condition to evaluate in the rating rule.
Rate Set Value to Lead Rating	RT_RS_TO_LEAD_RATE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Lead Rating by Rate Set Value	Map branch script rate-set values to lead ratings.

Defining Lead Ratings and Setting Workflow Triggers

Access the Lead Rating page.



Lead Rating page

Send Notification? Select to send an email notification to the worklist explaining that the lead or opportunity with the specified rating has not been accepted or rejected within the allowable time.

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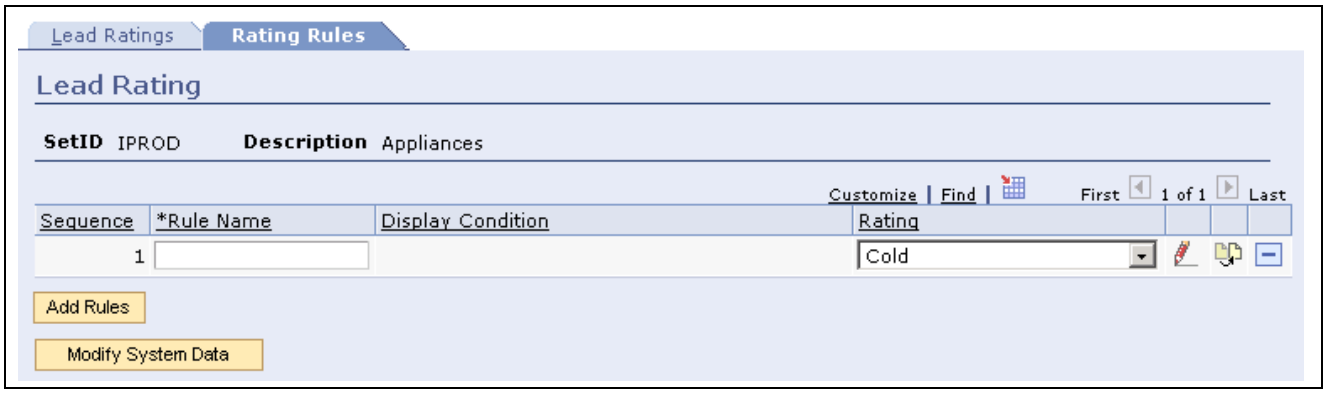
Max Time (maximum time) and **Unit of Time** — Specify the maximum delay period—expressed in days, hours, or minutes—by which a lead with that rating must either be accepted or rejected. If the lead is not accepted or rejected within that time, then the defined workflow is triggered.

Setting Up Lead Rating Rules

Access the Rating Rules page.



Rating Rules page

A lead rating rule is a condition and a rating that the lead received if the condition is met. Lead rating rules are associated to a setID.

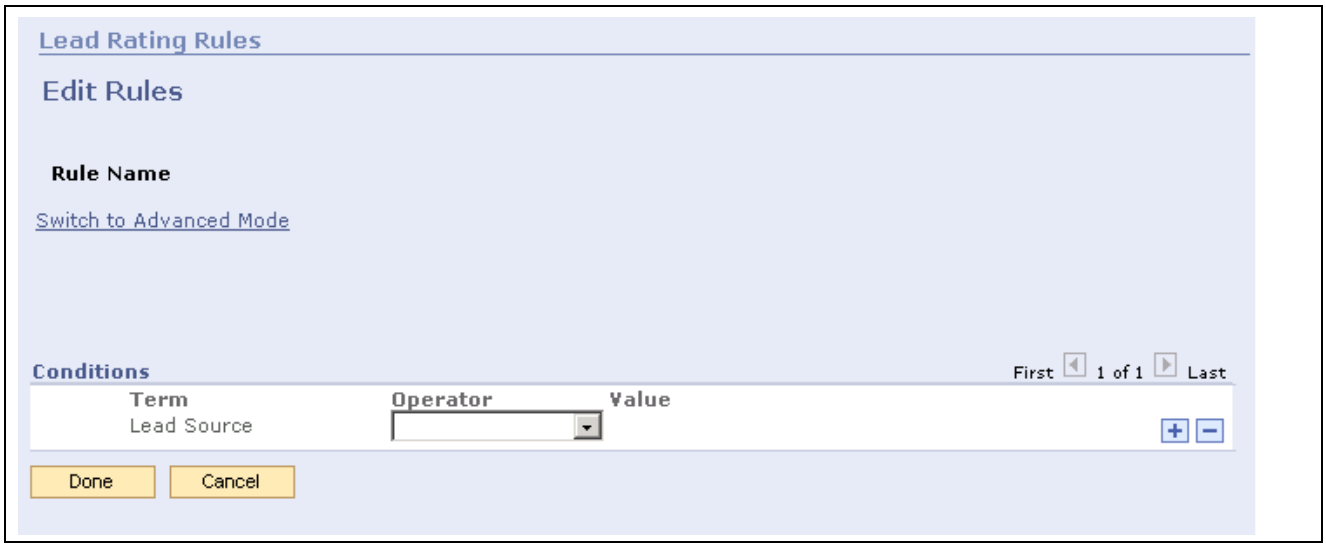
Rule Name — Enter a free-form text name for the rule.

Display Condition — Displays the rule for assigning the rating to the lead.

Rating — Displays the ratings that you set up on the Lead Ratings page.

Building Conditions for Rating Rules

Access the Edit Rules page.



Edit Rules page

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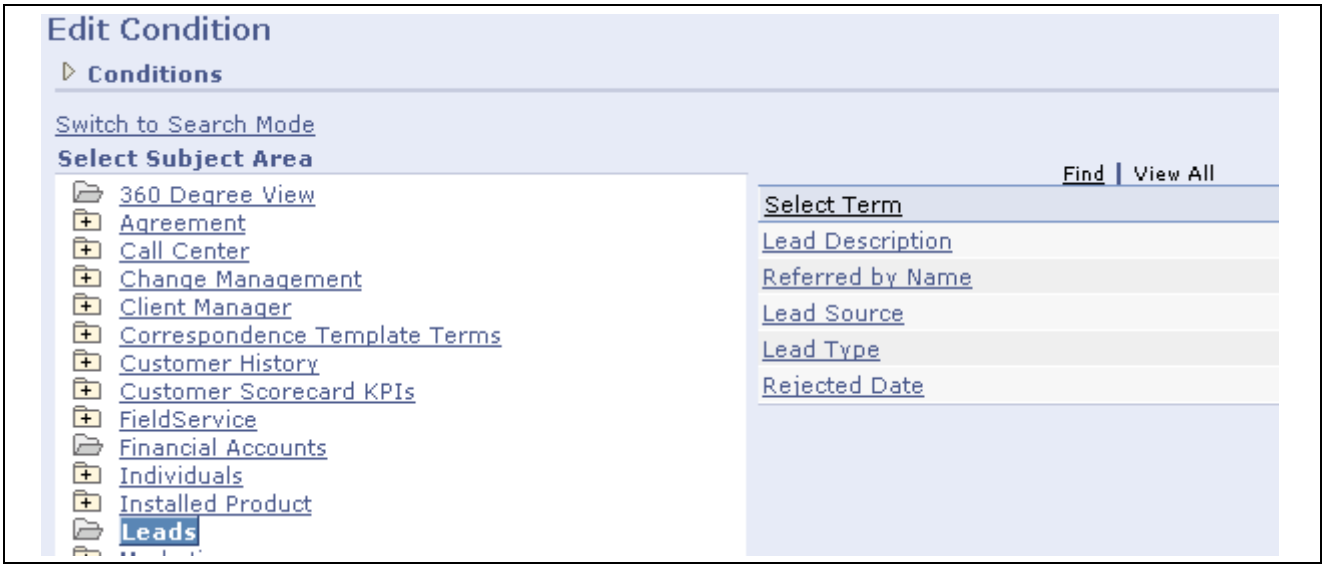
This page enables you to build the condition for a rule. On initial entry to the page, or when you add a term to the condition, the Select Term link appears. After you add a term to the condition, you select an operator from the available values and enter a value to build the condition.

Choosing Conditions to Evaluate

Access the Edit Condition page.

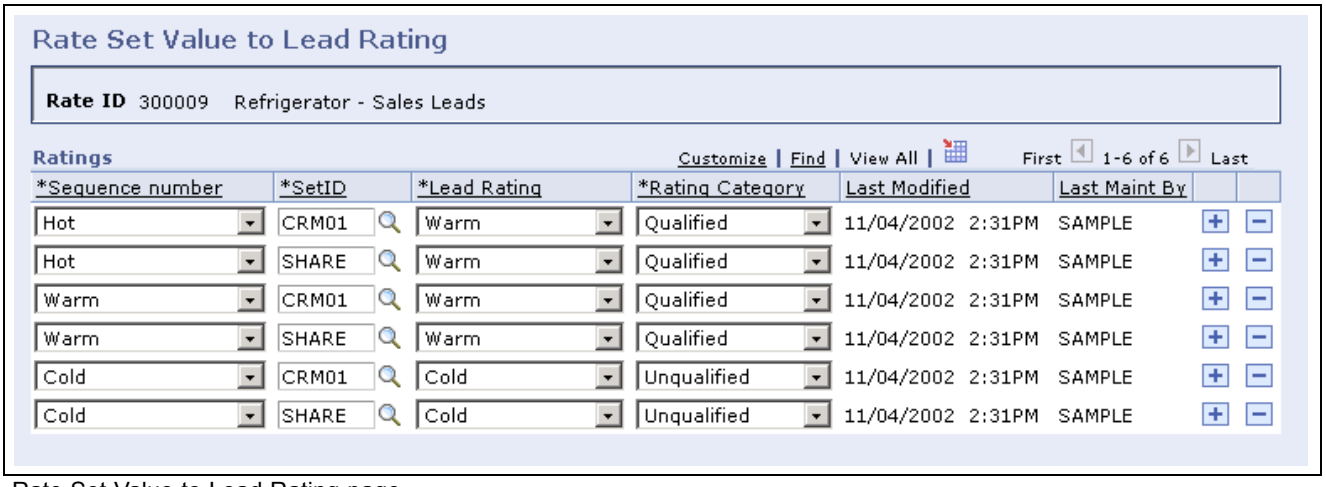


Edit Condition page

This page enables you to select a term that is evaluated as part of a rule. Only conditions that are applicable in the context of lead management appear on this page.

Mapping Survey Values to Lead Ratings

Access the Rate Set Value to Lead Rating page.



Rate Set Value to Lead Rating page

When a marketing (or telemarketing) group creates a branch script survey, it defines rate-set values so that the script can translate the overall score into a meaningful rating. You can map those rate-set values to lead ratings here. That way, if the survey score returns the equivalent of a lead rating with the rating category of *Qualified,* the marketing group can forward the prospect to the sales group as a qualified lead.

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See Also

PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook, "Using PeopleSoft Telemarketing"

Setting Up Assignment Weights

This section discusses how to define assignment weights.

To set up assignment weights, use the Assignment Weights (RSF_ASSIGN_W_TBL) component.

Page Used to Set Up Assignment Weights

Page Name	Object Name	Navigation	Usage
Assignment Weights	RSF_ASSIGN_W_TBL	Set Up CRM, Product Related, Sales, Lead and Opportunity, Assignment Weights	Define assignment weights to identify the importance of the criteria that the system uses to determine the assignment of a lead or opportunity to a territory.

Defining Assignment Weights

Access the Assignment Weights page.

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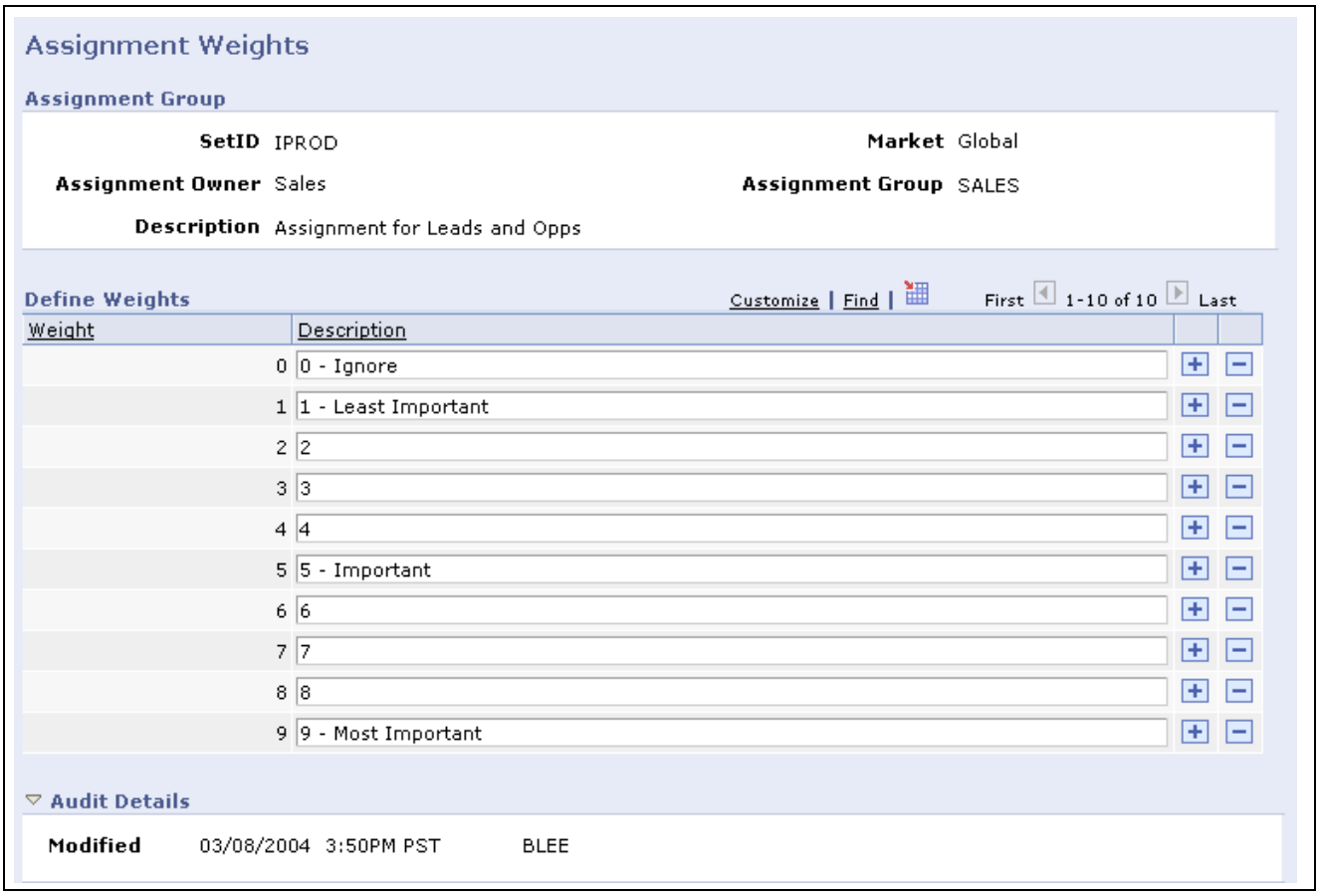

Assignment Weights page

Predefined assignment weights are delivered with the following anchor weights. You can use or modify these, and you can define different sets for different combinations of setIDs and assignment groups:

- *0* is ignore.
- *5* is important.
- *9* is most important.

Assignment weights are used, along with other criteria, when the system assigns leads and opportunities.

See Also

Chapter 7, “Configuring Assignment Criteria,” Defining Criteria and Their Weights, page 90

Setting Up Lead Reject and Turnback Reasons

This section discusses how to set up lead reject and turnback reasons.

To set up lead reject and turnback reasons, use the Lead Reject Reasons (RSF_LEAD_RJCT_RSN) component.

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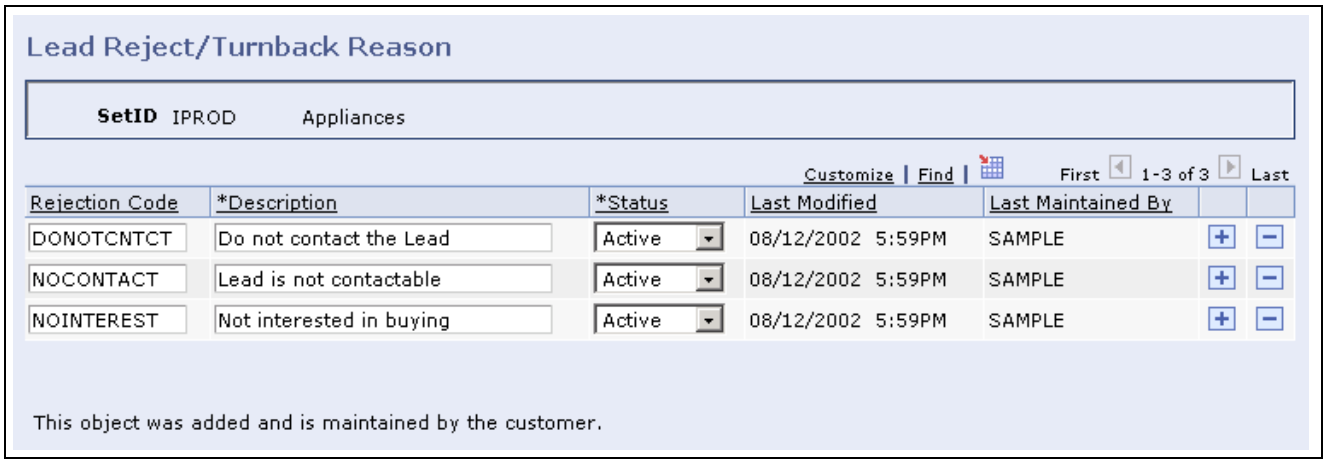
Page Used to Set Up Lead Reject and Turnback Reasons

Page Name	Object Name	Navigation	Usage
Lead Reject/Turnback Reason	RSF_LE_RJCT_RSN	Set Up CRM, Product Related, Sales, Lead and Opportunity, Lead Reject Reasons	Define reasons, keyed by setID, for sales representatives to use when rejecting or turning back a lead.

Setting Up Lead Reject and Turnback Reasons

Access the Lead Reject/Turnback Reason page.



Lead Reject/Turnback Reason page

Enter codes and descriptions for rejecting a lead.

To reject or turn back a lead, a sales user must identify a reject or turnback reason on the Lead - Summary page. On the Lead Reject/Turnback Reason page, you define the possible reasons that the sales user can select.

See Also

Chapter 13, “Assigning a Lead or Opportunity,” Accepting, Rejecting, or Turning Back a Lead Assignment, page 162

Setting Up Sales Contacts

This section discusses how to:

- Set up contact support levels.
- Set up contact impact levels.
- Set up contact titles.
- Set up contact departments.
- Set up contact roles.

To set up sales contacts, use the Sales Contact (RSF_CONT_SETUP) component.

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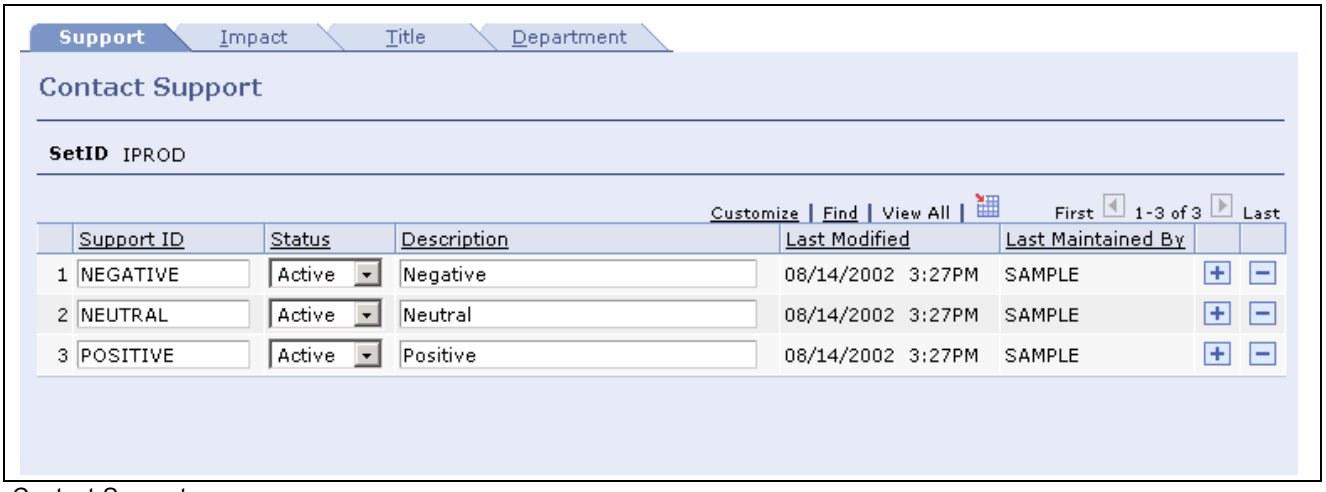
To set up contact roles, use the Contact Roles (RSF_ROLE_CD_TBL)component.

Pages Used to Set Up Sales Contacts

Page Name	Object Name	Navigation	Usage
Contact Support	RSF_CONT_SUPPORT	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Contacts, Contact Support	Set up support levels for describing contacts.
Contact Impact	RSF_CONT_IMPACT	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Contacts, Impact	Set up impact levels for describing contacts.
Contact Title	RSF_CONT_TITLE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Contacts, Title	Set up titles for describing contacts.
Contact Department	RSF_CONT_DEPART	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Contacts, Department	Set up departments for describing contacts.
Contact Roles	RSF_ROLE_CD_TBL	Set Up CRM, Product Related, Sales, Lead and Opportunity, Contact Roles, Contact Roles	Set up roles for describing contacts.

Setting Up Contact Support Levels

Access the Contact Support page.



Contact Support page

Create support levels (for example, *Negative, Neutral,* and *Positive*) that enable sales users to identify the type of support that a contact shows for moving the sale forward.

Support levels appear on the Impact tab on the Contact grid of the Discover page in the lead and opportunity details components.

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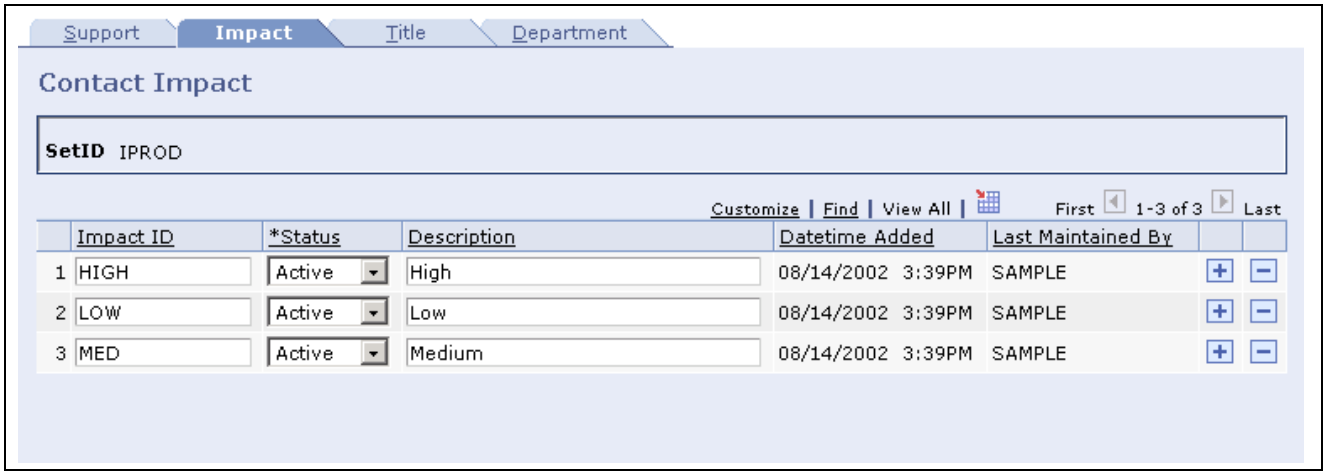
See Also

Chapter 11, “Creating Sales Leads and Opportunities,” Selecting Customer Contacts for a Lead or Opportunity, page 138

Setting Up Contact Impact Levels

Access the Contact Impact page.



Contact Impact page

Create impact levels (for example, *High, Low,* and *Medium*) that enable sales users to identify the impact that a contact might have on the customer’s decision to purchase.

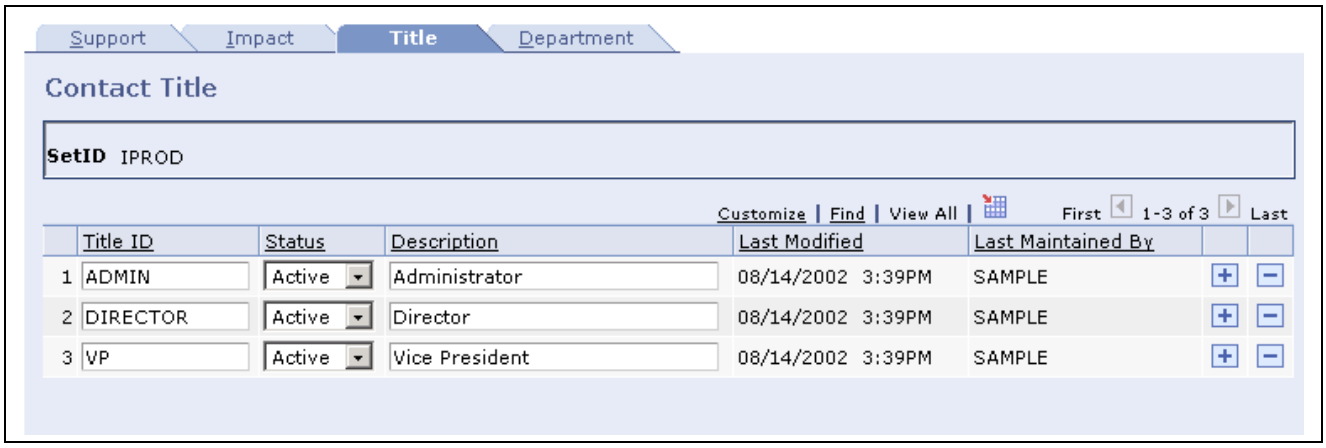
Impact levels appear on the Impact tab in the Contact grid of the Lead - Discover and Opportunity - Discover pages.

See Also

Chapter 11, “Creating Sales Leads and Opportunities,” Selecting Customer Contacts for a Lead or Opportunity, page 138

Setting Up Contact Titles

Access the Contact Title page.



Contact Title page

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Create titles (for example, *Administrator, Director,* and *Vice President*) that enable sales users to identify a contact's position in the customer's organization.

Titles appear on the Organization tab in the Contacts grid of the Lead - Discover and Opportunity - Discover pages.

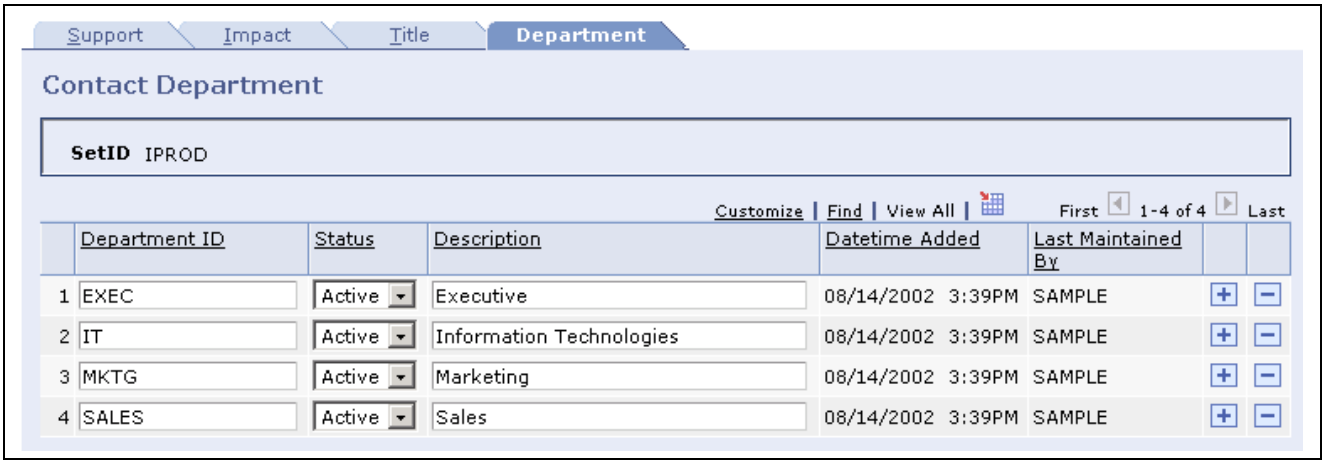
Note. The contact titles that you set up here are different from the contact roles, which are set up on the Contact Roles page and are used on the Impact tab in theContacts grid of the Lead - Discover and Opportunity - Discover pages. Contact roles are more detailed than titles. For example, you might set up *Vice President* as a title and *Vice President of Purchasing* as a role.

See Also

Chapter 11, "Creating Sales Leads and Opportunities," Selecting Customer Contacts for a Lead or Opportunity, page 138

Setting Up Contact Departments

Access the Contact Department page.



Contact Department page

Create departments (for example, *Executive, IT, Marketing,* and *Sales)* that enable sales users to identify the department that a contact belongs to in the organization.

Departments appear on the Organization tab in the Contact grid of the Lead - Discover and Opportunity - Discover pages.

See Also

Chapter 11, "Creating Sales Leads and Opportunities," Selecting Customer Contacts for a Lead or Opportunity, page 138

Setting Up Contact Roles

Access the Contact Roles page.

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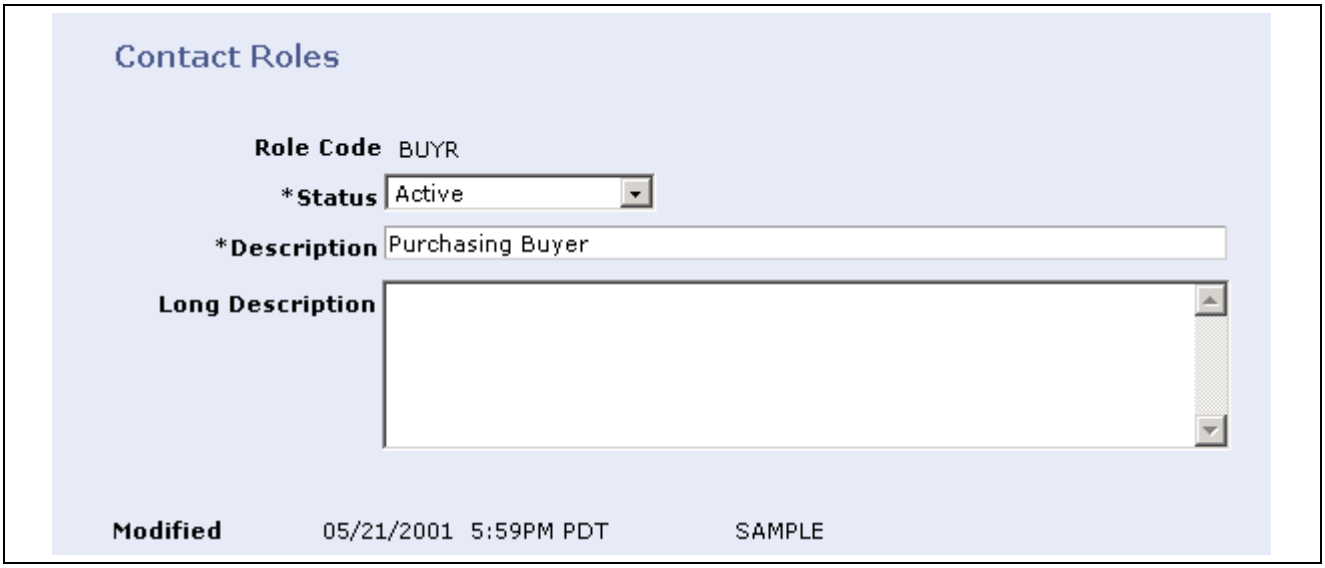

Contact Roles page

Define roles (for example, *Purchasing Manager, Purchasing Broker,* and *Vice President of Purchasing)* that enable sales users to identify the role that a contact has within the customer's organization.

Contact roles appear on the Contact tab in the Contacts grid of the Lead - Discover and Opportunity - Discover pages.

See Also

Chapter 11, "Creating Sales Leads and Opportunities," Selecting Customer Contacts for a Lead or Opportunity, page 138

Setting Up Sales Partners

This section discusses how to:

- Set up business partners and contacts.
- Set up partner roles.
- Set up partner status values.
- Set up partner types.
- Set up partner ratings.

To set up sales partners, use the Sales Partner (RSF_PARTNER) component.

Note. PeopleSoft Enterprise Sales provides basic functionality for sales partners. For more robust functionality, use PeopleSoft Partner Relationship Management. This section applies only to systems that do not use PeopleSoft Partner Relationship Management. If you use PeopleSoft Partner Relationship Management, set up sales partners in that application.

See *PeopleSoft Enterprise Partner Relationship Management 9 PeopleBook*

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Pages Used to Set Up Sales Partners

Page Name	Object Name	Navigation	Usage
Role Type	BO_ROLE_TYPE	Set Up CRM, Common Definitions, Customer, Role Type	Set up the role type of *Partner* to describe the relationship of sales partners.
Configure Relationship Views	BO_REL_VWCFG	Set Up CRM, Common Definitions, Customer, Configure Relationship Views	Configure the partner relationship.
Company	RD_COMPANY_DETAILS	Customers CRM, Add Company Customers CRM, Search Company	Create companies as sales partners.
Partner Role	RSF_PARTNR_ROLE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Partner, Partner Role	Define roles to describe partners on the sales team.
Partner Status	RSF_PARTNR_STAT	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Partner, Partner Status	Define statuses for partner activity on the sales team.
Partner Type	RSF_PARTNR_TYPE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Partner, Partner Type	Define types to describe partners on the sales team.
Partner Rating	RSF_PARTNR_RATE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Partner, Partner Rating	Define ratings to describe partners on the sales team.

Setting Up Business Partners and Contacts

Access the Company page.

Enter the following information for the external companies or consultants that you want to set up as partners: business names, addresses, phone numbers, and contact names.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “Defining Company Business Objects,” Maintaining General Company Information.

Setting Up Partner Roles

Access the Partner Role page.

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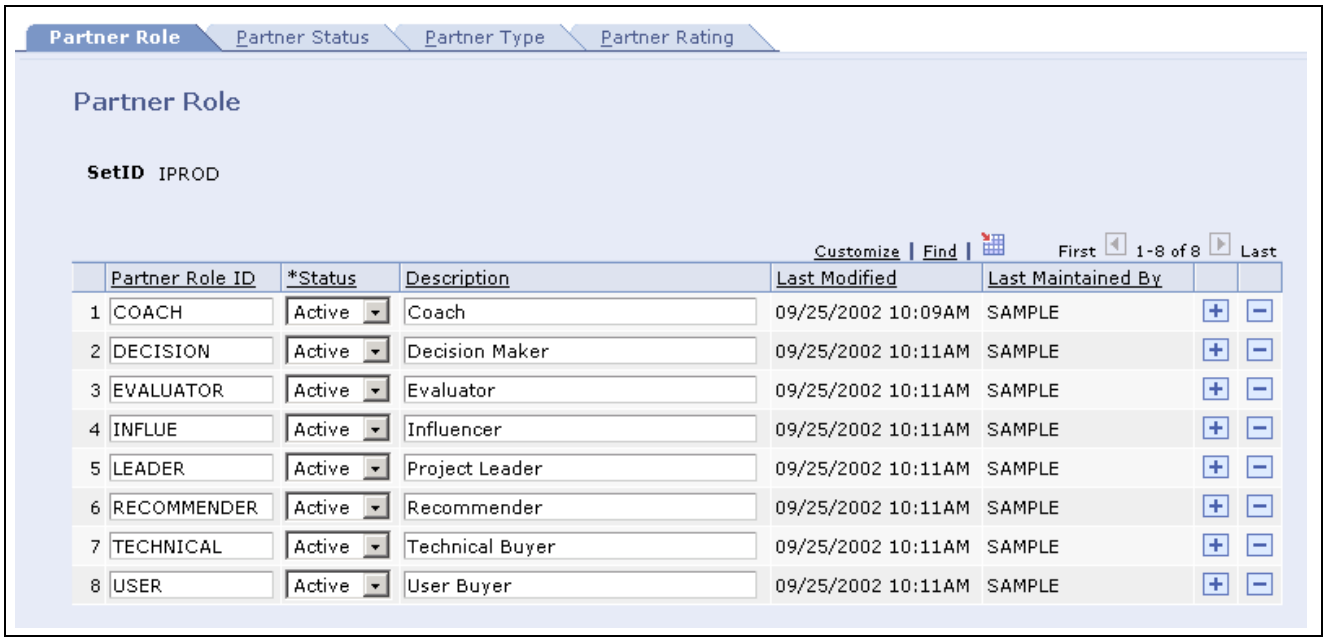
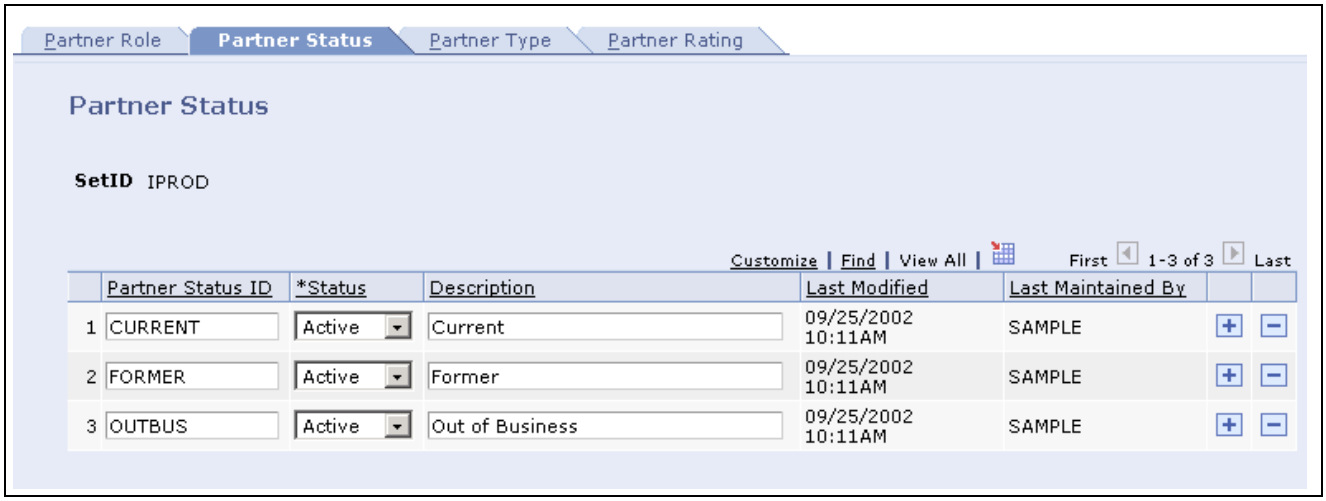


Partner Role page

Enter a partner role ID, status, and description (for example, *Coach, Decision Maker,* or *Evaluator)* to identify the roles of partners. Add rows to create as many partner roles as you need.

Setting Up Partner Status Values

Access the Partner Status page.



Partner Status page

Enter a partner status ID, status, and description (for example, *Current, Former,* or *Out of Business)* to identify the status of partners' relationship with the organization. Add rows to create as many partner statuses as you need.

Setting Up Partner Types

Access the Partner Type page.

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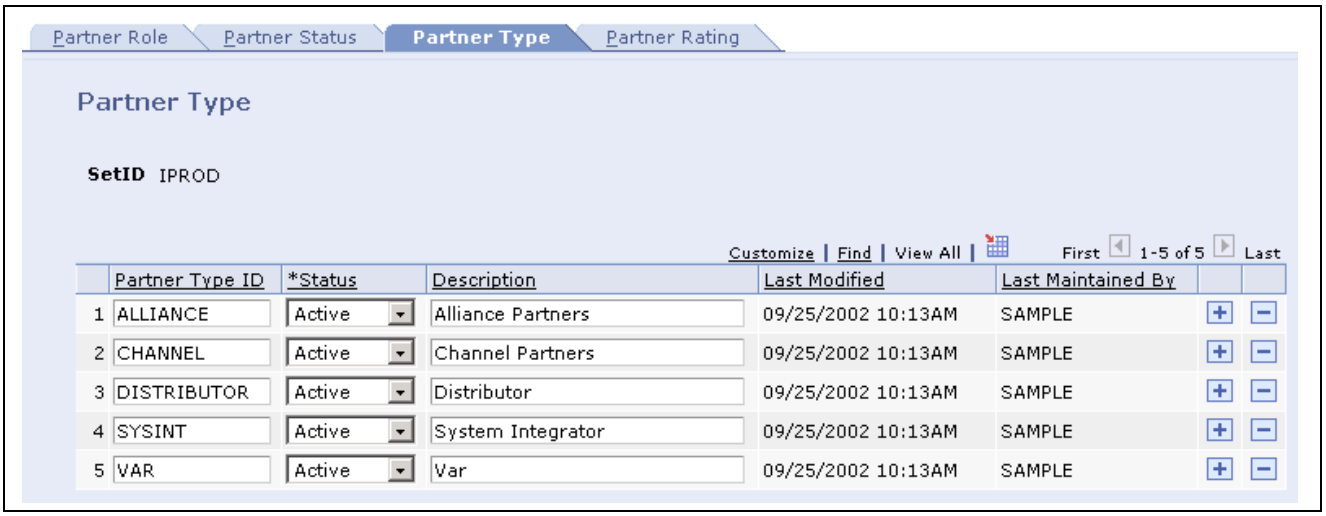
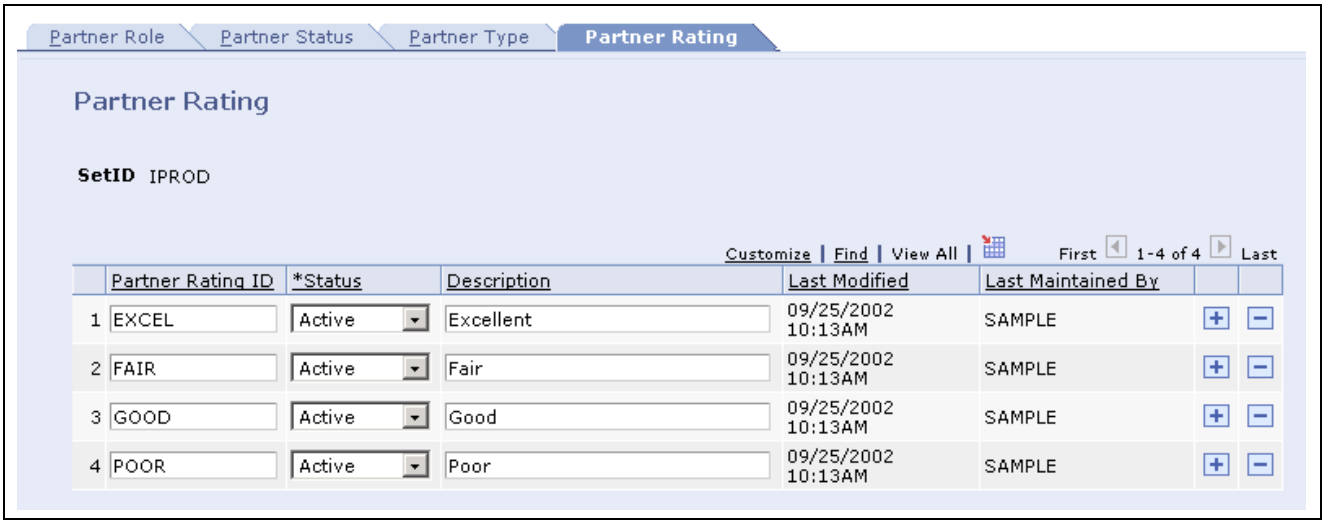


Partner Type page

Enter a partner type ID, status, and description (for example, *Alliance Partners, Channel Partners,* or *Distributor)* to identify the types of partners with which the organization interacts. Add rows to create as many partner types as you need.

Setting Up Partner Ratings

Access the Partner Rating page.



Partner Rating page

Enter a partner rating, status, and description (for example, *Excellent, Fair, Good,* or *Poor)* to rate partners' working relationships or history of success with the organization. Add rows to create as many partner ratings as you need.

Setting Up Sales Competitors

This section discusses how to:

- Set up the competitor relationship.

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- Set up business competitors and contacts.

Pages Used to Set Up Sales Competitors

Page Name	Object Name	Navigation	Usage
Role Type	BO_ROLE_TYPE	Set Up CRM, Common Definitions, Customer, Role Type	Set up the role type *Competitor,* which you can apply to various sales competitors.
Configure Relationship Views	BO_REL_VWCFG	Set Up CRM, Common Definitions, Customer, Configure Relationship Views	Configure the competitor relationship.
Company	RD_COMPANY_MAIN_2	Customers CRM, Company	Create companies as sales competitors.

Setting Up the Competitor Relationship

Access the Role Type page.

Set up the role type *Competitor* to identify the relationship of an external company or consultant with whom you compete for sales. You must also configure the competitor relationship before you apply it to competing businesses.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “Defining Control Values for Business Objects,” Defining Role Types and Role Categories.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “Defining Control Values for Business Objects,” Defining Relationship Types and Relationship Categories.

Setting Up Business Competitors and Contacts

Access the Company page.

Enter information about the external companies or consultants that you set up as competitors.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “Defining Company Business Objects,” Maintaining General Company Information.

Setting Up Buying Criteria

This section discusses how to:

- Set up buying criteria types.
- Set up buying criteria impact levels.
- Set up buying criteria priority levels.
- Set up buying criteria status values.

To set up buying criteria, use the Sales Buying Criteria (RSF_NEEDS) component.

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Note. The system does not display buying criteria fields on the Lead - Propose and Opportunity - Propose pages unless you use display templates to specify that you want to display the buying criteria fields.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Display Templates for Leads and Opportunities, page 69.

Pages Used to Set Up Buying Criteria

Page Name	Object Name	Navigation	Usage
Buying Criteria Type	RSF_NEED_TYPE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Buying Criteria, Buying Criteria Type	Define types to describe customer buying criteria.
Buying Criteria Impact	RSF_NEED_IMPACT	Set Up CRM, Product Related, Lead and Opportunity, Sales, Sales Buying Criteria, Buying Criteria Impact	Define impact levels to describe customer buying criteria.
Buying Criteria Priority	RSF_NEED_PRIORITY	Set Up CRM, Product Related, Lead and Opportunity, Sales, Sales Buying Criteria, Buying Criteria Priority	Define priority levels to describe customer buying criteria.
Buying Criteria Status	RSF_NEED_STATUS	Set Up CRM, Product Related, Lead and Opportunity, Sales, Sales Buying Criteria, Buying Criteria Status	Define statuses to describe customer buying criteria.

Setting Up Buying Criteria Types

Access the Buying Criteria Type page.

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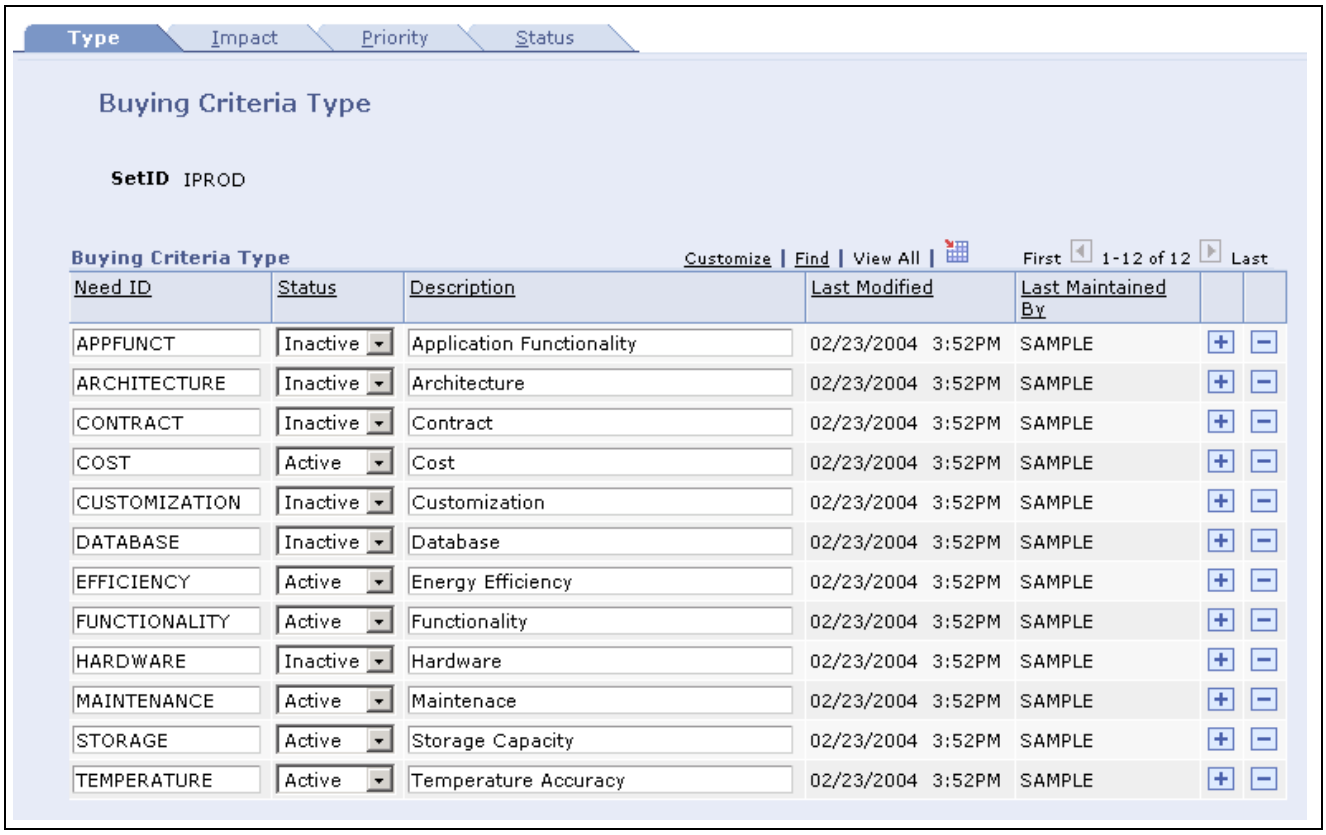


Buying Criteria Type page

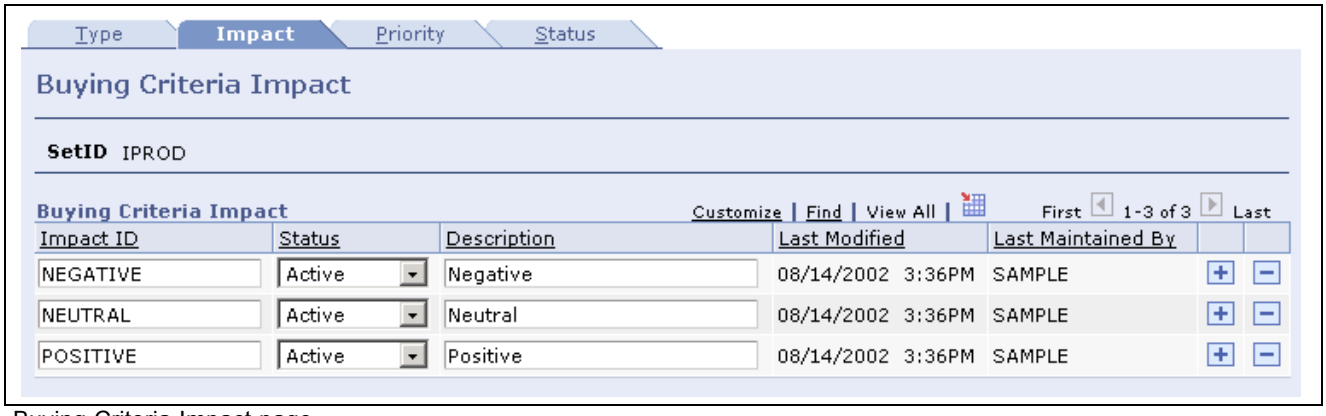
Enter a buying criteria ID, status, and description (for example, *Application Functionality, Contract Terms,* and *Customization*) to identify the types of criteria that influence customer decisions to purchase. Add rows to create as many types as you need.

See Also

Chapter 14, "Qualifying a Lead or Opportunity," page 171

Setting Up Buying Criteria Impact Levels

Access the Buying Criteria Impact page.



Buying Criteria Impact page

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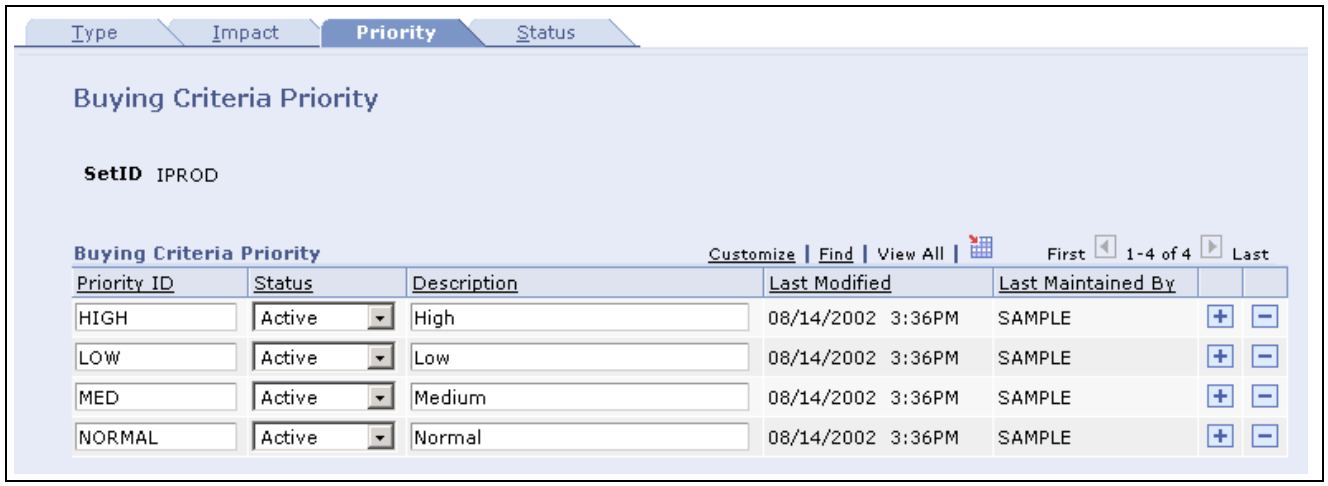
Enter an impact ID, status, and description (for example, *Negative, Neutral,* and *Positive)* to identify the impact of buying criteria on customer decisions to purchase. Add rows to create as many impact levels as you need.

See Also

Chapter 14, "Qualifying a Lead or Opportunity," page 171

Setting Up Buying Criteria Priority Levels

Access the Buying Criteria Priority page.



Buying Criteria Priority page

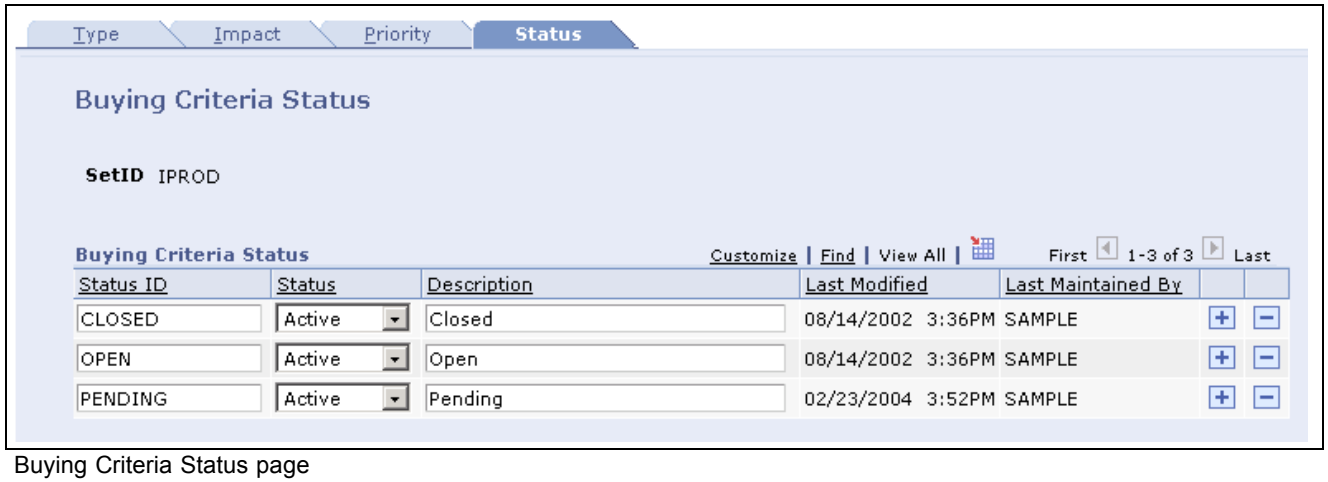
Enter a priority ID, status, and description (for example, *High, Low, Medium,* and *Normal)* to identify the priority of customers' need for a product. Add rows to create as many need priorities as necessary.

See Also

Chapter 14, "Qualifying a Lead or Opportunity," page 171

Setting Up Buying Criteria Status Values

Access the Buying Criteria Status page.



Buying Criteria Status page

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Enter a status ID, status (*Active* or *Inactive*), and description to identify the status of customers' need for a product. For example, you might create a buying criteria status of *Closed* or *Open.* Add rows to create as many status levels as you need.

See Also

Chapter 14, "Qualifying a Lead or Opportunity," page 171

Setting Up Lead Sources

This section discusses how to set up a lead source.

To set up a lead source, use the Lead Sources (RSF_LEAD_SOURCE) component.

Page Used to Set Up Lead Sources

Page Name	Object Name	Navigation	Usage
Lead Source	RSF_LEAD_SOURCE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Lead Sources, Lead Source	Identify common sources for leads.

Setting Up a Lead Source

Access the Lead Source page.

Lead Source page

Enter a description and status to identify each source that typically produces leads. PeopleSoft Enterprise Sales delivers several predefined lead sources, including *Agreement, Case, Marketing, Online Marketing, Partner, Sales,* and *Telemarketing.* You can modify or delete these, and you can create as many additional lead sources as you need.

When a sales user enters a lead, the system uses *Sales* as the lead source, on the Lead - Qualify page.

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Setting Up Fallout Reasons

This section discusses how to set up fallout reasons.

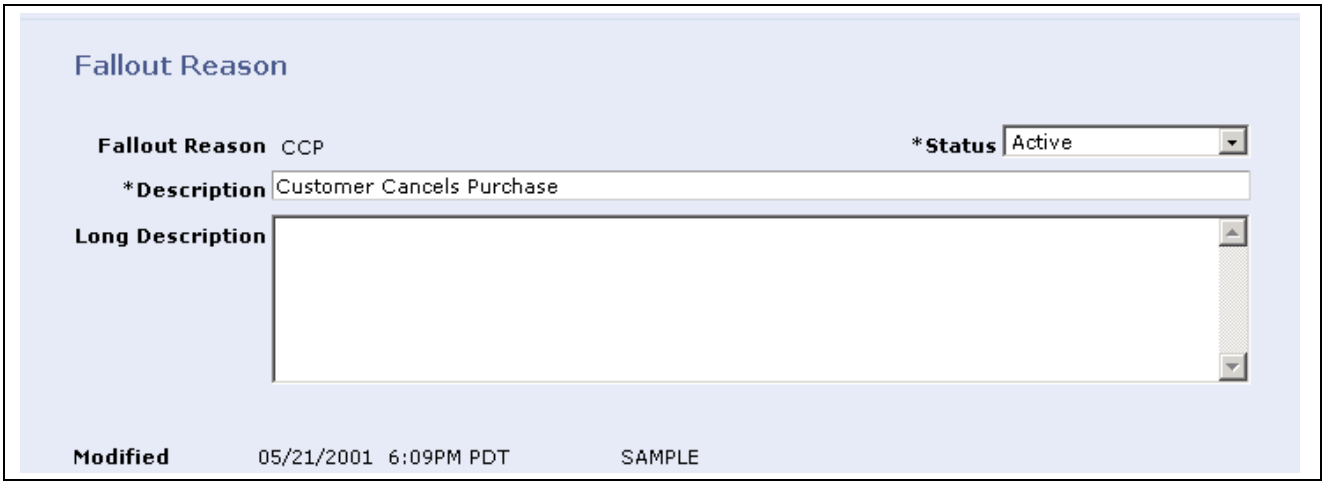
To set up fallout reasons, use the Fallout Reason (RSF_FALLOUT_RSN) component.

Page Used to Set Up Fallout Reasons

Page Name	Object Name	Navigation	Usage
Fallout Reason	RSF_FALLOUT_RSN	Set Up CRM, Product Related, Sales, Lead and Opportunity, Fallout Reason, Fallout Reason	Define reasons to describe why an opportunity is lost.

Setting Up Fallout Reasons

Access the Fallout Reason page.



Fallout Reason page

Enter a status, description, and long description (for example, *Customer Cancels Purchase, Lost Deal on Price,* and *Couldn't Meet Delivery Date)* to identify the reasons why an opportunity might be lost. Create as many fallout reasons as you need.

Setting Up Pipeline Segments

This section discusses how to define pipeline segments.

To set up pipeline segments, use the Pipeline Segments (RSF_SEGMENT) component.

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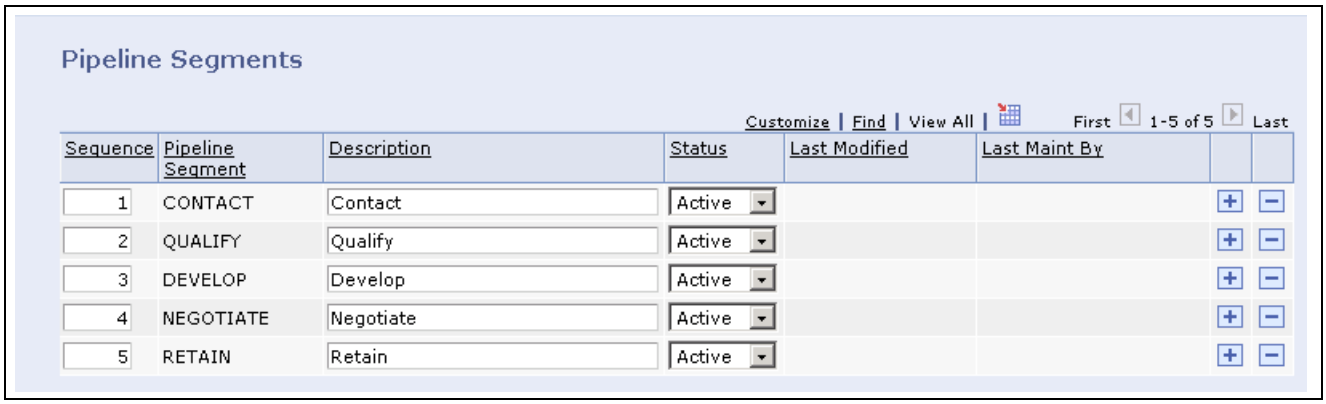
Page Used to Set Up Pipeline Segments

Page Name	Object Name	Navigation	Usage
Pipeline Segments	RSF_SEGMENT	Set Up CRM, Product Related, Sales, Lead and Opportunity, Pipeline Segment, Pipeline Segments	Define pipeline segments that correlate to stages of the sales process.

Defining Pipeline Segments

Access the Pipeline Segments page.



Pipeline Segments page

Pipeline segments correlate to stages of your sales process. The default segments correlate to the stages of the Knowledge Enabled Sales process: Contact, Qualify, Develop, Negotiate, and Retain.

Enter a description and status to identify each pipeline segment to correlate it to the stages of your business process.

Add rows to create additional segments. The system provides default sequence numbers. You can override the sequence numbers to reorder the stages.

Pipeline segments appear on the Segment Pipeline page in the Review Pipeline component.

See Chapter 19, "Viewing the Opportunity Pipeline," page 215.

Note. You can use other sales process definitions—for example, the Miller Heiman process—to define pipeline segments.

Setting Up Templates for Importing Leads

This section provides an overview of lead-import templates and discusses how to:

- Create a lead-import template.
- Rearrange fields on a template.
- View the import template map.

To set up templates for importing sales leads, use the Sales Lead Import Template (RB_IMP_TEMPLATE) component.

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Understanding Lead-Import Templates

When you import leads into PeopleSoft Enterprise Sales, the system copies data from a spreadsheet to the Leads table and the Customer Data Model tables. Before you can import leads, you must set up a lead-import template that specifies the mapping between the spreadsheet and the tables. PeopleSoft Enterprise Sales delivers a default template that can be used as delivered. You can create additional templates, if needed. When setting up a lead-import template, you use the Sales Lead Import Templates component to:

- Specify the fields to include during the import.
- Map the spreadsheet columns to fields in the Lead table.
- Set up duplicate checking for leads.
- Set up lookup criteria for Customer Data Model fields.

In addition, you can create a spreadsheet template that contains the column headings for fields that you import into PeopleSoft Enterprise Sales.

Pages Used to Set Up Templates for Importing Leads

Page Name	Object Name	Navigation	Usage
Import Template	RB_IMP_TEMPLATE	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Lead Import Templates, Import Template	Create templates for importing sales lead data from comma-delimited spreadsheets.
Maps	RB_IMP_TMPL_MAP	Set Up CRM, Product Related, Sales, Lead and Opportunity, Sales Lead Import Templates, Maps	View the import template map.
Import Resequencing Page	RB_IMP_SEQ_SEC	Click the Resequence Fields link on the Import Template page.	Override sequence numbers to rearrange fields on a template.

Creating a Lead Import Template

Access the Import Template page.

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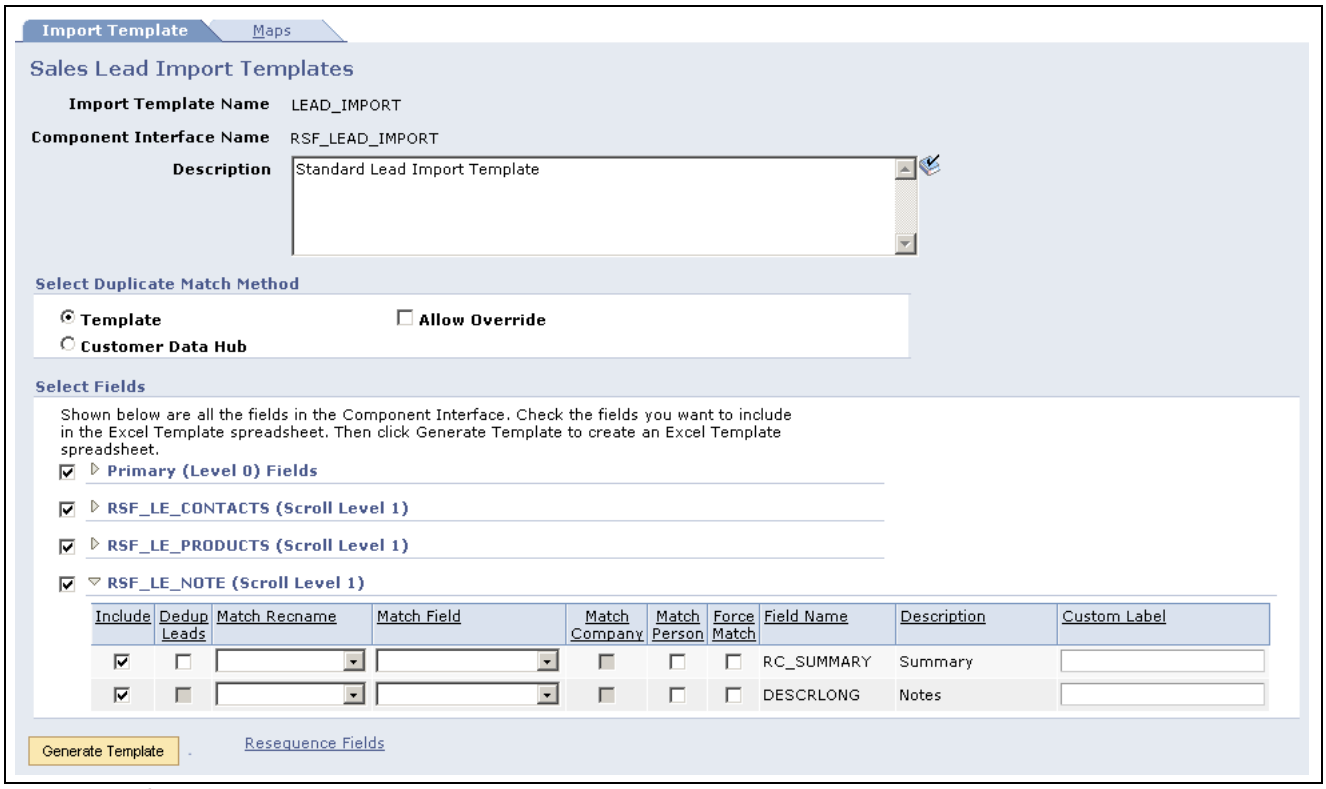

Import Template page

Each level of the Leads component interface is included as a collapsible section of the page. Each section lists all of the fields from that level. Select the fields to include in a Microsoft Excel spreadsheet to create a template for importing lead data.

Note. PeopleSoft Enterprise Sales delivers a default template called LEAD_IMPORT. In the default template, some fields do not have the Include check box selected. These are system fields that are part of the template for processing purposes but are typically not included in a spreadsheet containing data to be imported.

Note. Access the Address Format page to determine the fields used for address formats specific to a country.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up General Options," Setting Up Address Formats and Values.

Page Actions

Resequence Fields Click to access the Resequence Import Template page, where you can override sequence numbers to reorder the fields in the template.

Generate Template Click to generate the template, after selecting the fields, specifying the custom labels, and resequencing the fields (if necessary).

The system generates a Microsoft Excel spreadsheet template (only the column headers are provided) and opens it in a separate window. You can use this as a starting point to enter actual data into the spreadsheet.

Generating the template automatically saves the entire page. At any time after the page is saved, you can select the Maps tab to view a list of the column headings and see how the fields correlate to them.

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Warning! If you manually change a column heading in the Microsoft Excel spreadsheet, the mapping for that field is lost and the system cannot determine how to map that column to a database field.

Select Fields

Expand a component interface level.

Include	Select to include the field during the import of lead data.
Dedup Leads (deduplicate leads)	Select to enable the system to use this field when searching for duplicate sales leads. If the system finds a sales lead with data that matches the spreadsheet data for all the fields that are duplicate-checked, the lead is marked as a duplicate and held for review.
Match Recname (match record name)	Select the record in the Customer Data Model table in which the field is stored.
Match Field	Select the field in the Customer Data Model record that is equivalent to the field name for the lead.
Match Company	Select this check box for all fields that the system uses to compare existing company data in the Customer Data Model tables against imported data. For all fields with the Match Company check box selected, if the imported data matches existing data, then the system does not add the company to the Customer Data Model tables.
Match Person	Select this check box for all fields that the system uses to compare existing person data in the Customer Data Model tables against imported data. For all fields with the Match Person check box selected, if the imported data matches existing data, then the system does not add the person to the Customer Data Model tables.
Force Match	Select this check box to force a match of the imported data with the data in the Customer Data Model table. For example, an email address is typically unique and could be used to force a match of a contact.
Field Name and **Description**	Displays the name and description of the field in the Leads table into which the data is imported.
Custom Label	Enter the label or column heading in the spreadsheet from which the system retrieves data for the field.

Rearranging Fields on a Template

Access the Import Resequencing page - Resequence Import Template page.

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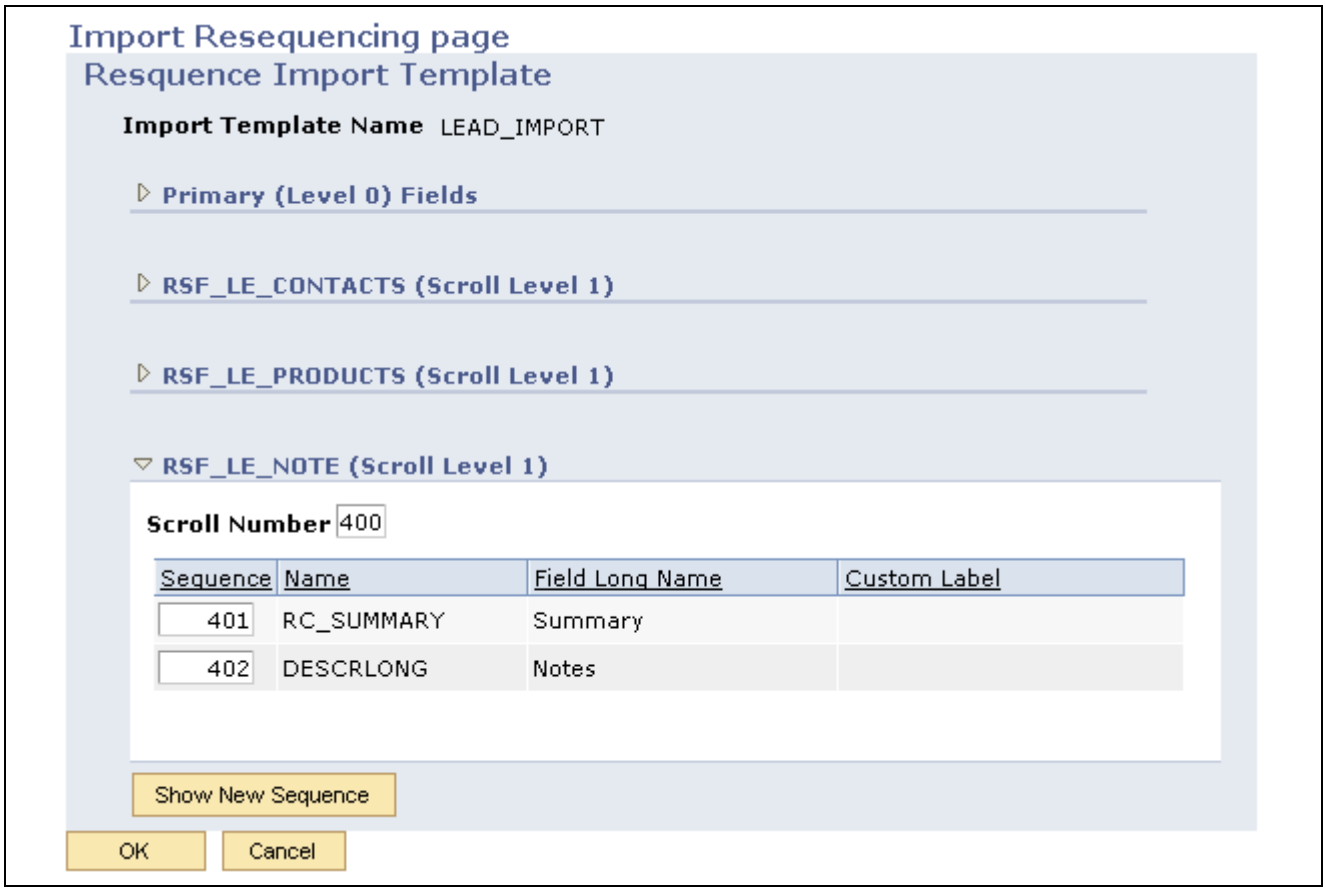

Import Resequencing page - Resequence Import Template page

Sequence Override the numbers to rearrange the component level fields, if necessary. This option resequences only the fields on the template. It does not affect how fields appear on pages in the components.

Show New Sequence Click to view the fields in the new order.

OK Click to accept the new sequence and return to the template page.

Cancel Click to return to the template page without resequencing.

Viewing the Import Template Map

Access the Maps page.

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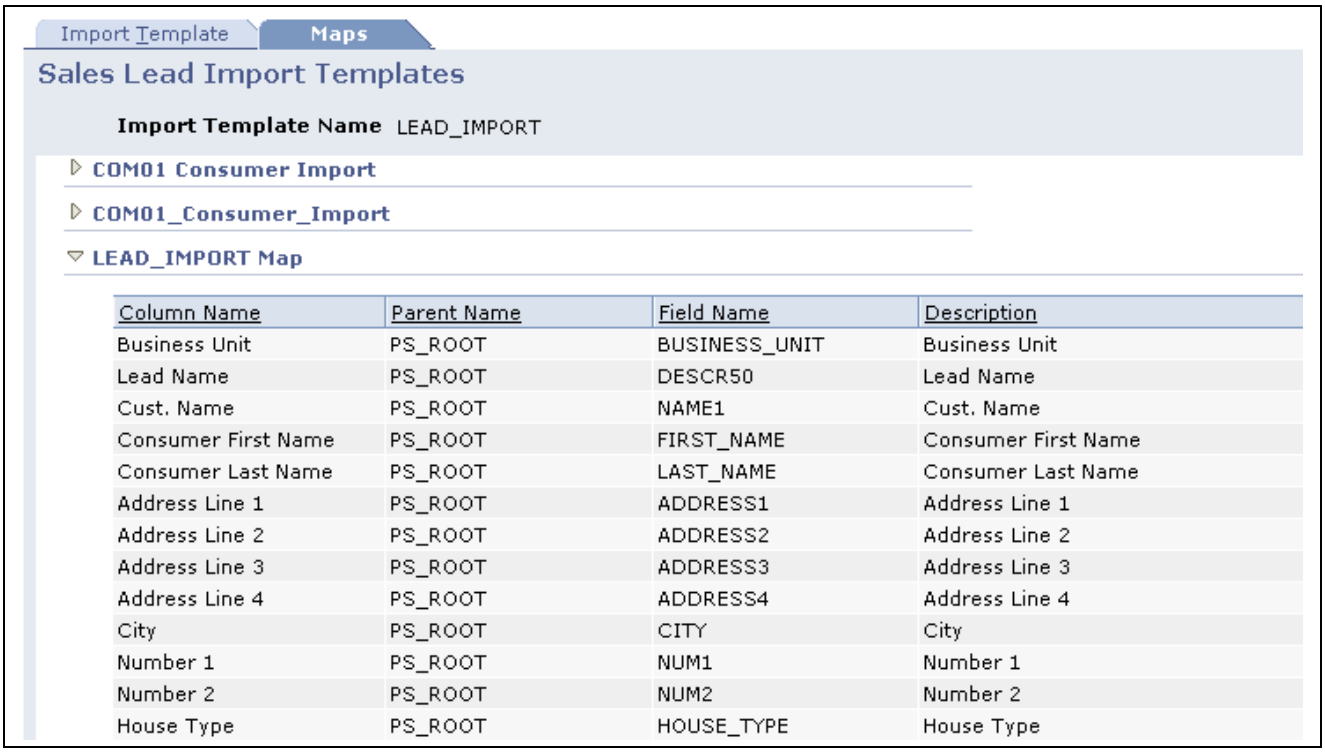

Column Name	Parent Name	Field Name	Description
Business Unit	PS_ROOT	BUSINESS_UNIT	Business Unit
Lead Name	PS_ROOT	DESCR50	Lead Name
Cust. Name	PS_ROOT	NAME1	Cust. Name
Consumer First Name	PS_ROOT	FIRST_NAME	Consumer First Name
Consumer Last Name	PS_ROOT	LAST_NAME	Consumer Last Name
Address Line 1	PS_ROOT	ADDRESS1	Address Line 1
Address Line 2	PS_ROOT	ADDRESS2	Address Line 2
Address Line 3	PS_ROOT	ADDRESS3	Address Line 3
Address Line 4	PS_ROOT	ADDRESS4	Address Line 4
City	PS_ROOT	CITY	City
Number 1	PS_ROOT	NUM1	Number 1
Number 2	PS_ROOT	NUM2	Number 2
House Type	PS_ROOT	HOUSE_TYPE	House Type

Maps page

After you generate the template, view a list of the column headings to see how the fields correlate.

Setting Up the Summary Page for Leads and Opportunities

This section provides an overview of summary pages for leads and opportunities and discusses how to:

- Configure the summary page for leads and opportunities.
- Precalculate terms that appear on the summary page.
- View a list of term updates.
- Update business object names.

See Chapter 17, "Managing Leads and Opportunities," Managing a Lead or Opportunity by Using Summary Information, page 201.

Understanding Summary Pages for Leads and Opportunities

The component summary page is the first page a user sees on displaying an existing lead or opportunity. Each summary page is composed of a header, which identifies the component as a lead or opportunity, and one or more sections.

Sales delivers a standard setup for leads and opportunities and provides a component for you to modify the delivered setup. The delivered summary page for leads includes the following sections: summary, contacts, tasks, notes, team, products, and quotes. You can add sections or modify sections.

RSF_LEAD_ENTRY is the component name for the lead summary page for leads, and *RSF_OPPORTUNITY* is the component name for the opportunity summary page.

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Pages Used to Set Up the Summary Page for Leads and Opportunities

Page Name	Object Name	Navigation	Usage
Summary Page Setup	RB_SMRY_GRID	Set Up CRM, Common Definitions, Component Configuration, Summary Page Setup, Summary Page Setup	Configure the summary page for leads or opportunities.
Term Selection	RB_SMRY_SEL_TERM	Add a new row to the Summary Text Bind Fields grid on the Summary Page Setup page. Select *Term* in the Type field. Click the Search button.	Search for a term to appear on the summary page.
Schedule Updates	RSF_TL_RUN	Set Up CRM, Product Related, Sales, Lead and Opportunity, Schedule Term Update, Schedule Updates	Precalculate terms that appear on the Summary page.
View Update Result	RSF_UPDATE_SRCH	Set Up CRM, Product Related, Sales, Lead and Opportunity, View Update Result, View Update Result	View a list of term updates.
Update Business Object Names	RSF_UPD_BO_ATTR	Set Up CRM, Product Related, Sales, Lead and Opportunity, View Update Result, Update Business Object Names	This program corrects the Customer, Site and Contact names in Lead and Opportunity tables to match with the customer master data.

Configuring the Summary Page for Leads and Opportunities

Access the Summary Page Setup page.

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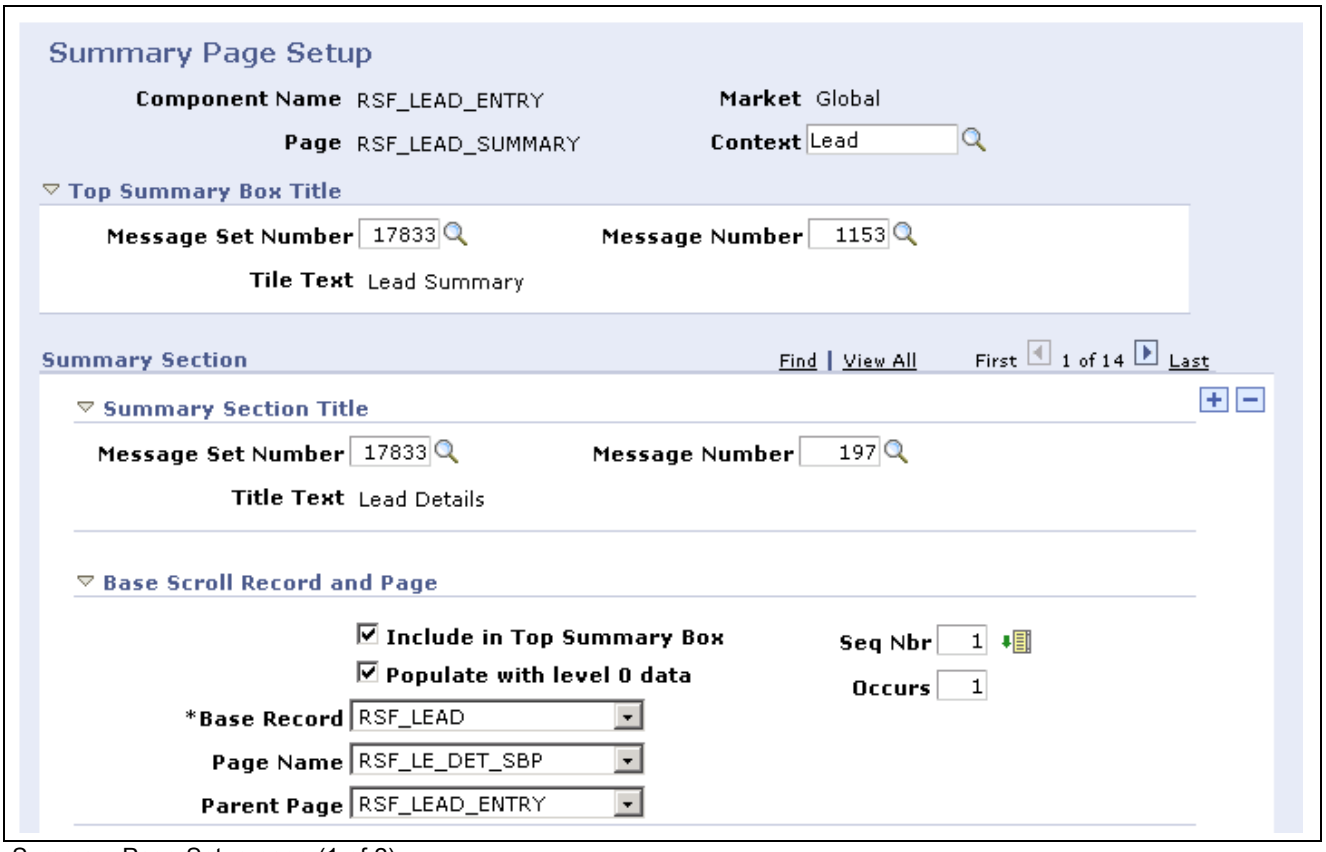
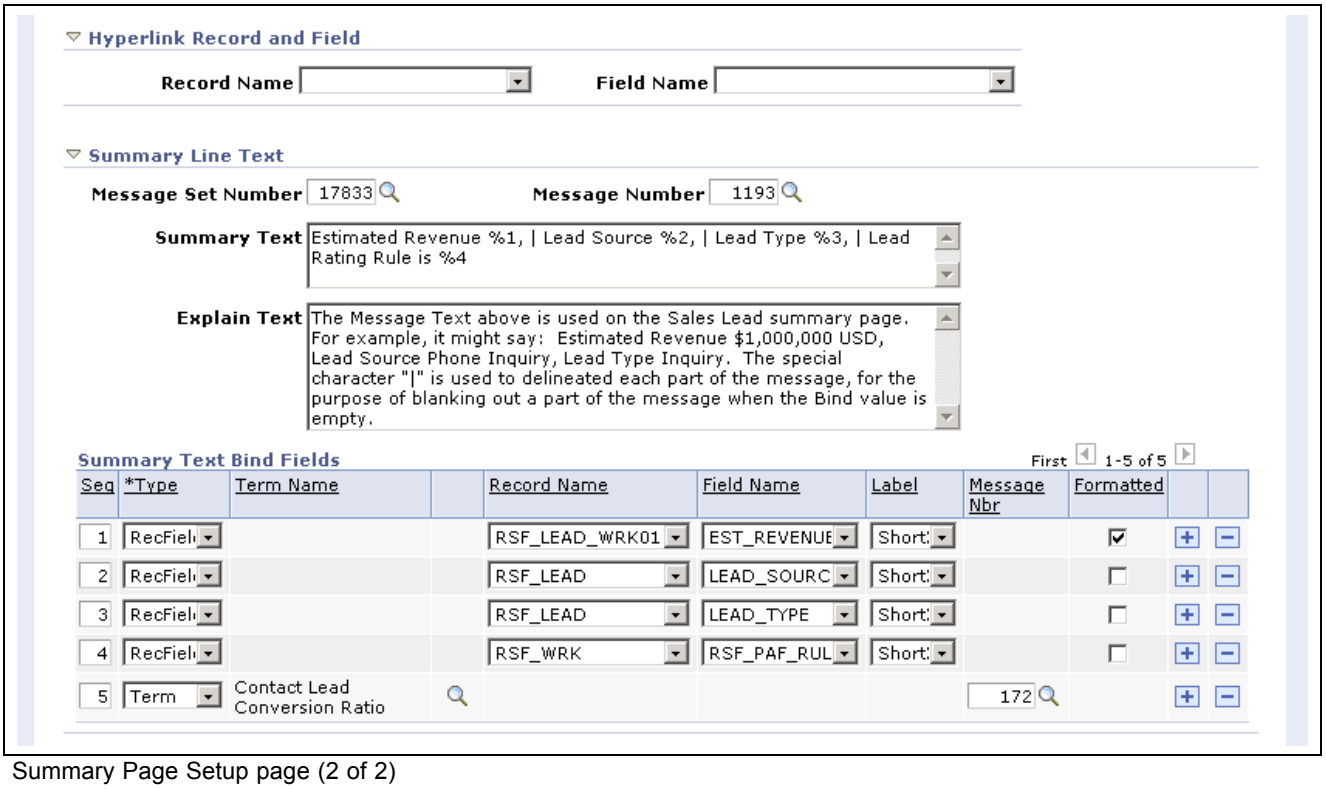


Summary Page Setup page (1 of 2)



Summary Page Setup page (2 of 2)

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Top Summary Box Title

These fields also appear in the Summary Section Title region. The values that you enter in these fields determine the information that displays in the title areas of the report. It is recommended that you do not change the information in the Top Summary Box Title collapsible section.

Message Set Number Enter the message set number for the PeopleSoft application. In most cases, you use *17833* (Sales Force Automation).

Message Number Enter the message number, which determines the section heading.

Title Text Displays the text that appears on the summary page. This text is based on the message number that you select.

Summary Sections

Create a summary section for each topic that you want to include in the summary.

Base Scroll Record and Page

The fields on this page region determine the source and placement of the information that appears in the section.

Include in Top Summary Box Select to include this section in the summary box at the top of the summary page.

Populate With level 0 data Select to indicate that the data that is displayed in the section comes from level 0, as opposed to a scroll of information. For example, on the Lead - Summary page, level 0 information is from the highest level RSF_LEAD record. Only the top summary box can contain level 0 information.

If this check box is not selected, lower level information from the record appears. For the RSF_LEAD record, this might be the list of contacts or products for the lead.

Seq Nbr (sequence number) Enter a sequence number for the section.

Occurs Enter the number of rows to include in the section. For example, if the section contains a list of contacts, enter the number of contacts to show.

Resequence Click to resequence the sections based on changes that you made to the Seq Nbr field.

Base Record Select the record that is the source of the data.

Page Name Select the sub-page, or page region, that is used to view and maintain the records that appear in the summary scroll area.

Parent Page Select the parent of the sub-page that you use to maintain and view the data. The system transfers to the parent page when the user clicks a link on the summary page.

Hyperlink Record and Field

Record Name To include a link in the section, enter the record containing the target field for the link.

Field Name To include a link in the section, enter the target field for the link.

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Summary Line Text

Message Set Number Enter the message set number for the PeopleSoft application. In most cases, you use *17833* (Sales Force Automation).

Message Number Enter the message number, which determines the text that the system displays in the section.

Summary Text The system displays the variables and text that appear in the section. The variables are designated by the percent sign followed by a number; for example, *%1*. The variables correspond to the numbers in the Summary Text Bind Fields section.

Explain Text The system displays an explanation of the text that appears in the section.

Summary Text Bind Fields

Seq (sequence) Enter the sequence number. This number is associated with the variable number in the Summary Text field.

Type Select *Record* (default) to enter record information and *Term* to enter term information.

If you select *Record,* then the Record Name, Field Name, Label, and Formatted fields are enterable. If you select *Term,* then you must click the Lookup Term button to select a Term Name and enter a value in the Message Nbr (Message Number) field.

Record/Term Name Select the record or term that contains the field that the system displays.

If you select the *Record* type, then you select the system name of the record from the available choices.

If you select the *Term* type, then you click the Lookup button to

Field Name Select the field that the system displays. This field appears only if you select the *Record* type.

Label Select the source of the field that appears on the summary page. This field appears only if you select the *Record* type. Values are:

- (blank)

  This is the default. Select it to display the field value as stored in the database on the component summary page.

- *Short XLAT*
- *Long XLAT*

For example, a lead type that is represented as *QU* (Qualified) in the database might have a Short XLAT (short translate) value of *Qualified* and a Long XLAT (long translate) value of *Qualified Lead.*

Format Display Select to display the formatted display-value of the field. For example, for a currency field, you might have the system display *$1,000.00* instead of the value *1000.* This field appears only if you select the *Record* type.

Term Name Displays the name of the term that you select.

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Click the Lookup Term button to access an untitled page where you can select the term that the system displays.

See Also

PeopleSoft Enterprise Components for CRM 9 PeopleBook

Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Lead Ratings, page 38

Precalculating Terms that Appear on the Summary Page

Access the Schedule Updates page.

Schedule Updates page

Enter the following information and click the Run button. You can save an update and run it multiple times.

Enable Select to calculate the term when you run the update.

Update Description Enter a description for the set of metrics you select to run.

SetID Select the setID whose data to use to calculate the term.

Term Select the term to calculate. Only terms that were added to the Summary Text Bind Fields for either the Lead or Opportunity component are available in this list.

Viewing a List of Term Updates

Access the View Update Result page.

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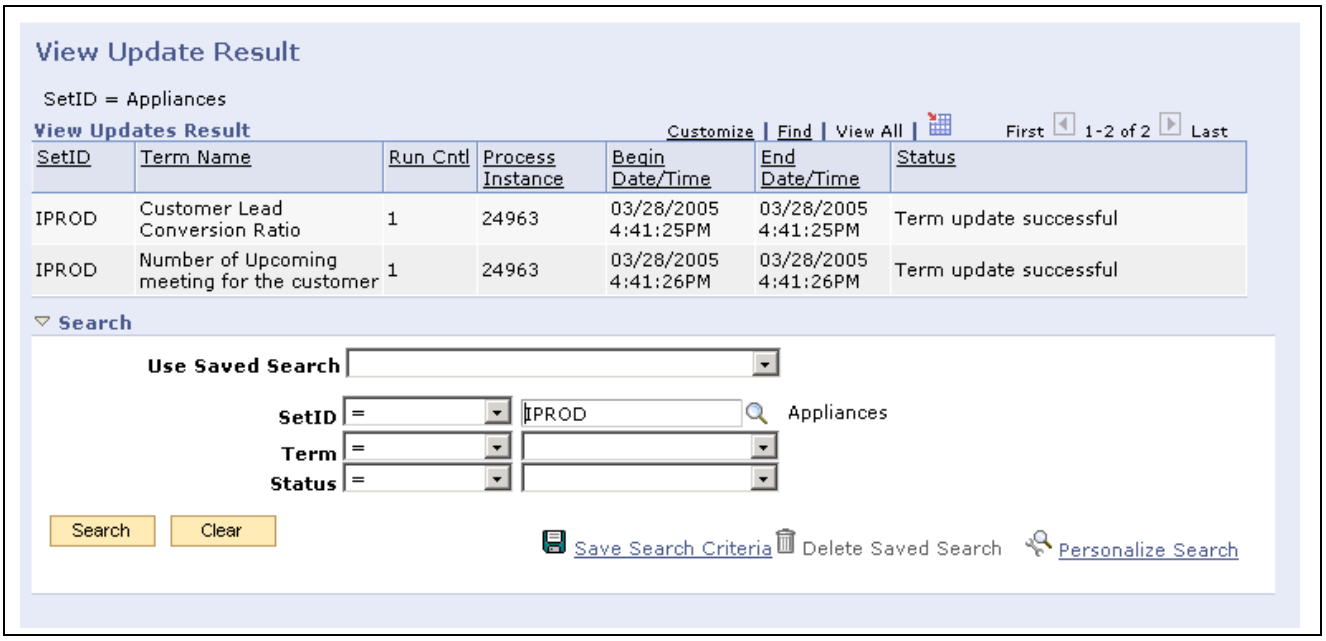

View Update Result page

This page displays a list of the term updates that were run for a given setID and information about the run.

Updating Business Object Names

Access the Update Business Object Names page.

This App Engine program syncs the Customer, Site and Contact names in Lead and Opportunity tables to match with the customer master data.

Setting Up Display Templates for Leads and Opportunities

PeopleSoft Enterprise Sales provides display templates that enable you to control the appearance and behavior of the Lead and Opportunity components for specific business needs. For the Opportunity component (RSF_OPPORTUNITY), PeopleSoft Enterprise Sales has one display template named *CORE*. For the Lead component (RSF_LEAD_ENTRY), PeopleSoft Enterprise Sales has three display templates:

- *CORE*

  Determines the appearance and behavior of the Lead component for enterprise users.

- *PRM_SALES*

  Determines the appearance and behavior of the Lead component for partner users.

- *FSI_SALES*

  Determines the appearance and behavior of the Lead component for wealth management referrals.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Configuring Display Templates”.

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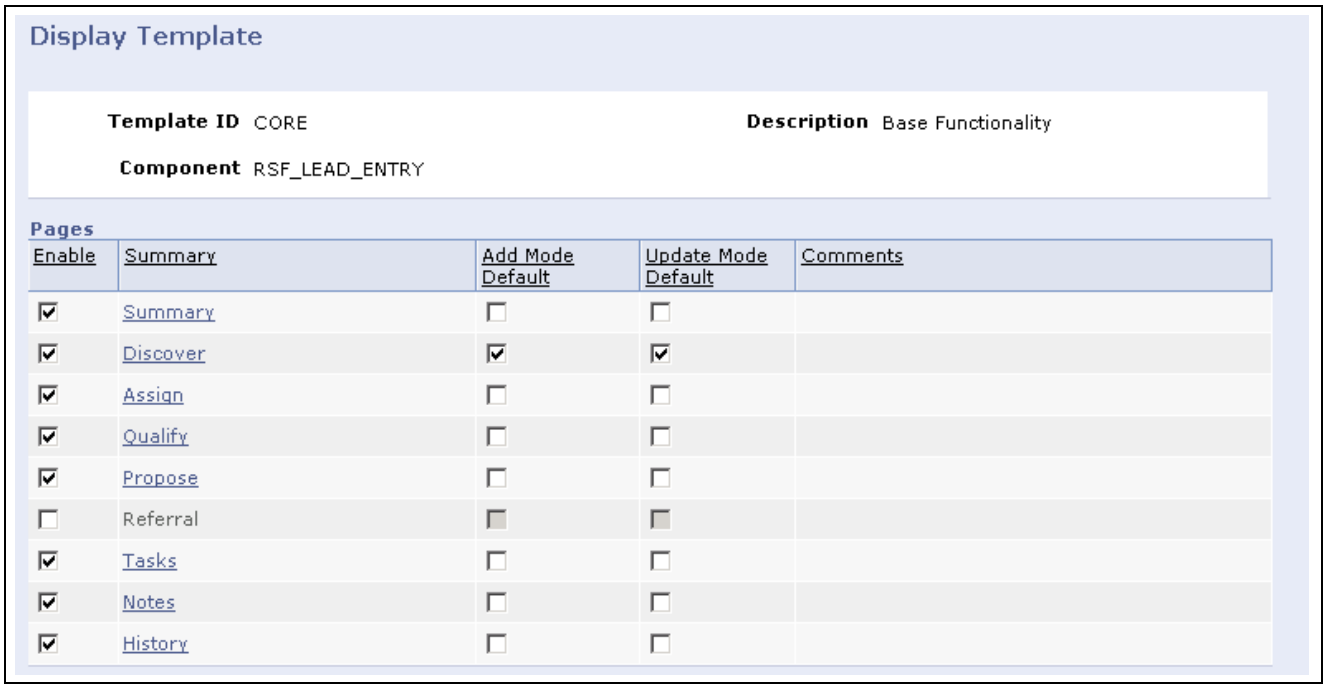
Pages Used to Set Up Display Templates for Leads and Opportunities

Page Name	Object Name	Navigation	Usage
Display Template	RDT_TMPL_PAGE	Set Up CRM, Common Definitions, Component Configuration, Display Templates, Display Template Details	Set up display templates for leads and opportunities.
Display Template - Page Definition	RDT_TMPL_SECTN	On the Display Template page, select a page. Click the Show Section Details link. Select the Security tab for a section.	Use a functional option with the display template.

Setting Up Display Templates for Leads and Opportunities

Access the Display Template page.



Display Template page (1 of 2)

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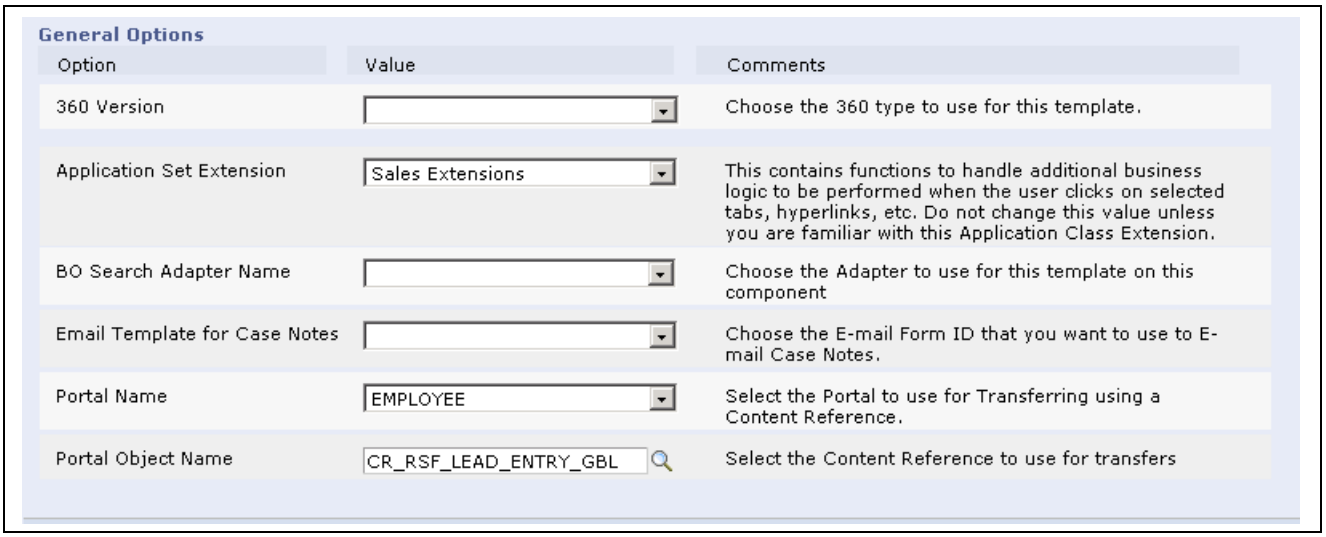

Display Template page (2 of 2)

This table lists the default configurations for the pages defined for the *CORE* display template for the Lead and Opportunity components:

Page	Configuration
Summary	Configure the Summary page by using the Summary Page Setup page. See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up the Summary Page for Leads and Opportunities, page 63. The functional option *CORE_RSF_SUMMARY* determines whether a user can view the Summary page. See Chapter 4, "Setting Up Sales Security and Personalization," Setting Up Functional Options, page 27.
Discover	Displays the Customer, Lead/Opportunity Details, Contacts, and Accept/Reject sections. If you have installed PeopleSoft Partner Relationship Management, enable the Partner section on the display template.
Assign	Displays the Sales Team Members and Partner sections. If you have installed Partner Relationship Management, disable the Partner section and enable the Add Partner Rep section on the display template.
Qualify	Displays the Campaign, Competition, and Survey sections.
Propose	Displays the Product and Quote/Order sections. For opportunities, it also displays the Forecast section.

Functional Option Used with the Display Template

Access the Display Template - Page Definition page.

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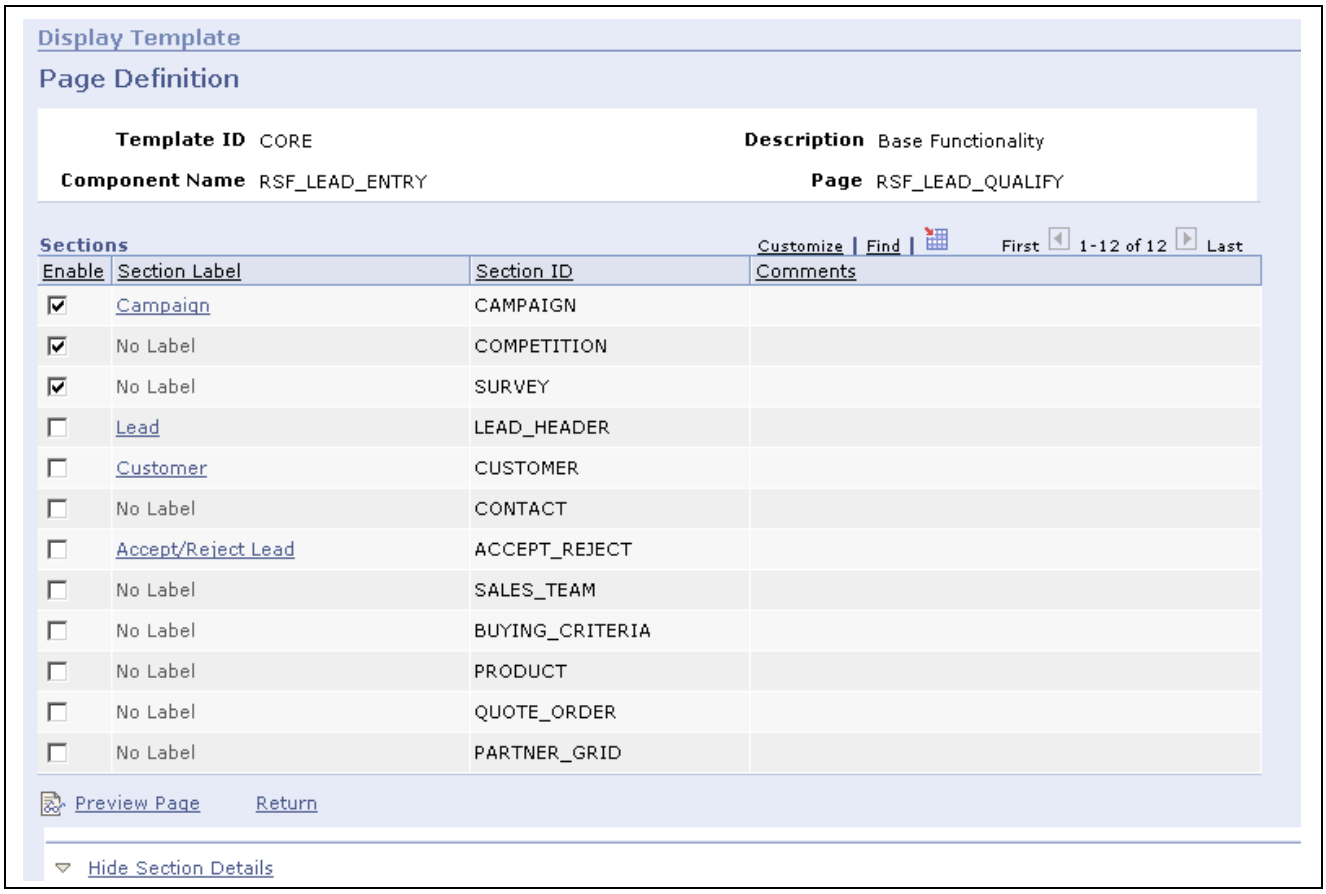
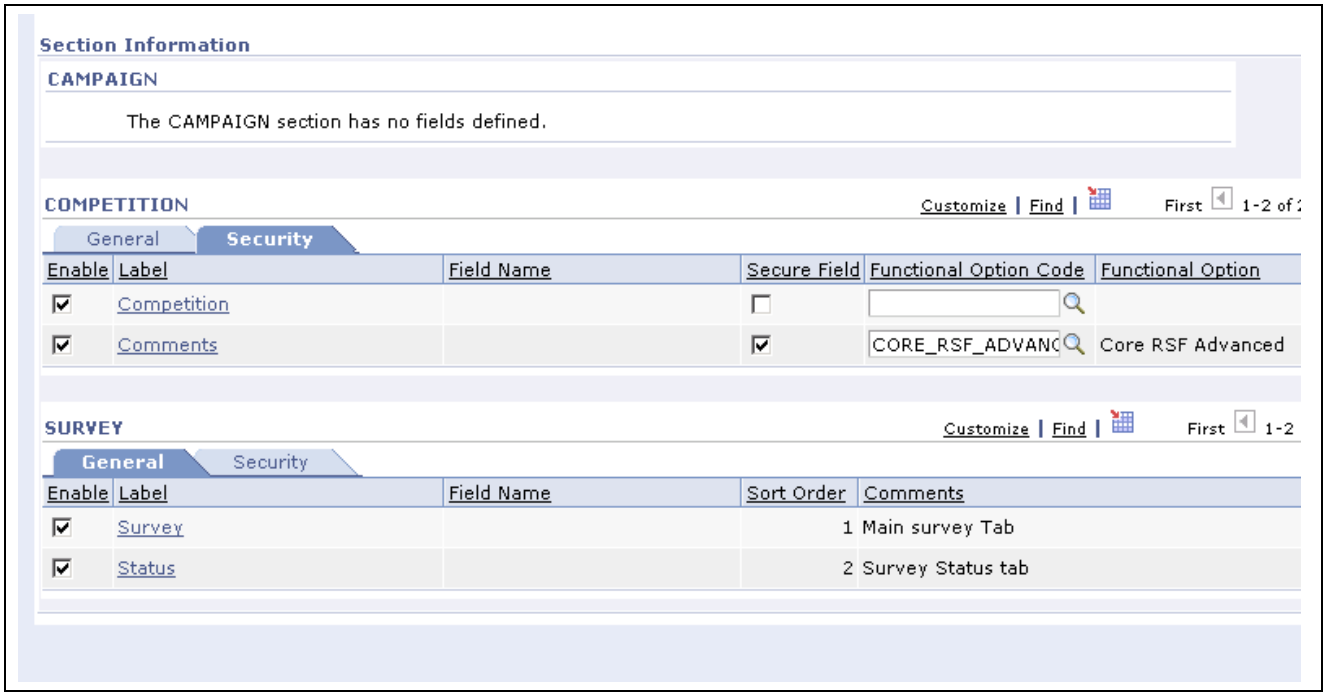


Display Template - Page Definition page (1 of 2)



Display Template - Page Definition page (2 of 2)

You can enter *CORE_RSF_ADVANCED* in the Functional Option Code field to either display or hide a field or grid tab in the Lead or Opportunity component, depending on the setting of the functional option for a user.

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See Chapter 4, "Setting Up Sales Security and Personalization," Setting Up Functional Options, page 27.

This table displays the grid tabs and fields in the delivered *CORE* display template for leads and opportunities that have the value *CORE_RSF_ADVANCED* in the Functional Option Code field.

Page - Section	Grid Tab or Field
Discover - Contacts	Phones tab, Impact tab, Organization tab, Correspondence tab
Assign - Sales Team Members	Territory tab, Additional Details tab, Comments tab
Qualify - Competition	Comments tab
Qualify - Survey	Status tab
Propose - Forecast (opportunity only)	Revenue Type field
Propose - Quote	Order tab, Audit tab

To hide or display specific fields or grid tabs in the Lead or Opportunity component, you can edit the *CORE* display template.

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CHAPTER 6

Setting Up Sales Forecasts

This chapter provides an overview of forecast setup and discusses how to define forecast elements.

Understanding Forecast Setup

Sales managers can use forecasts in PeopleSoft Enterprise Sales to predict sales for a specific time period. You create a forecast in PeopleSoft Enterprise Sales by uniquely identifying a forecast name and a time frame. The forecast name is a user-defined text field that describes characteristics of the forecast. The time frame specifies a particular week, month, quarter, or year.

For example, suppose the current date is April 1, 2004, and you are forecasting the sales of freezers for the third quarter of 2004 (July 1 to September 30). You generate forecasts monthly, so you expect to forecast again on May 1, 2004, and June 1, 2004. You can create three forecast names to meet your forecasting needs:

- Freezers: Apr
- Freezers: May
- Freezers: Jun

For the time frame, you must set up quarterly time frames in 2004. When you create a forecast, you select one of the forecast names and the third quarter 2004 time frame. Use the Time Frame component to set up time frames.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Defining Holiday Schedules," Defining Holiday Schedules, Time Frames, and Sales Quota Rollups.

Defining Forecast Elements

This section discusses how to:

- Define forecast names.
- Define forecast types.
- Define revenue types.

To define forecast names, use the Forecast Names (RSF_FCAST_ID) component.

To define forecast types, use the Forecast Type (RSF_FCAST_TYPE) component.

To define revenue types, use the Revenue Type (RSF_REV_TYPE) component.

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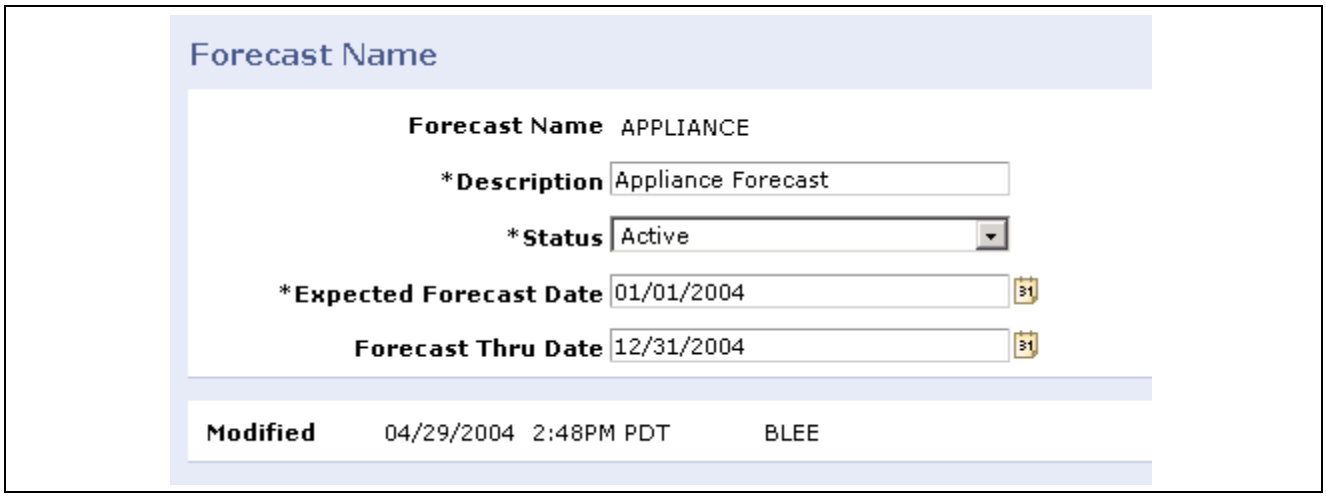
Pages Used to Define Forecast Elements

Page Name	Object Name	Navigation	Usage
Forecast Name	RSF_FCAST_ID	Set Up CRM, Product Related, Sales, Forecast, Forecast Names, Forecast Name	Define forecast names.
Forecast Type	RSF_FCAST_TYPE	Set Up CRM, Product Related, Sales, Forecast, Forecast Types, Forecast Type	Define forecast types, which are user-defined classifications.
Revenue Type	RSF_REV_TYPE	Set Up CRM, Product Related, Sales, Forecast, Revenue Types, Revenue Type	Define revenue types.

Defining Forecast Names

Access the Forecast Name page.



Forecast Name page

Expected Forecast Date

Enter the date on which sales users can use the forecast name to generate a forecast.

For example, suppose that the current date is May 1, 2004, and you are setting up a forecast name called *Freezers:June* for a forecast that will occur in June 2004. You do not want to make this forecast name available until June 2004, so you would enter an expected forecast date of June 1, 2004.

Forecast Thru Date (forecast-through date)

Enter the ending date for forecasting.

For example, suppose you are going to stop selling a product at the end of 2004. You would establish a forecast name with a forecast-through date of December 31, 2004. Sales users cannot use the forecast name to generate a forecast for the product for any time frames that begin after December 31, 2004.

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The system generates a list of possible forecasts for a forecast name when there are time frame periods defined. For example, suppose you enter an expected forecast date of July 1, 2004, and a forecast-through date of September 30, 2004. The system builds a list of possible forecasts using that forecast name and the following time frames:

- July, August, and September 2004 (if you use monthly time frames).
- Third quarter 2004 (if you use quarterly time frames).
- 2004 (if you use yearly time frames).

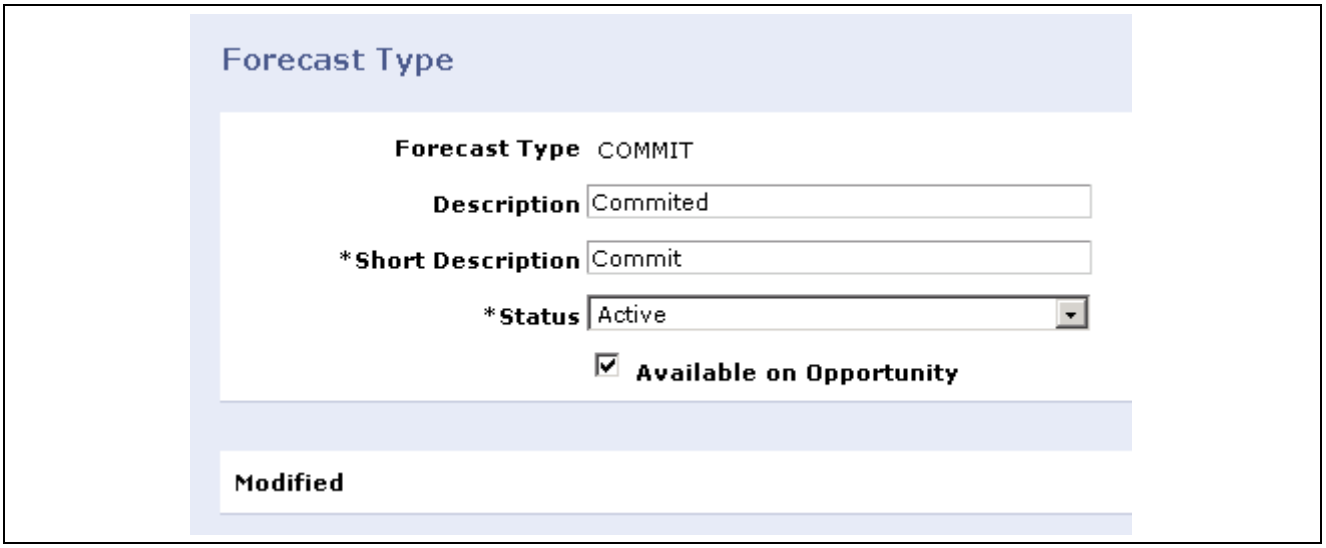
The system displays the list of possible forecasts on the Search My Forecasts and Search Rollup Forecasts components.

Use the Time Frame component to set up time frames.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up General Options," Setting Calendar Options.

Defining Forecast Types

Access the Forecast Type page.



Forecast Type page

Use forecast types to categorize opportunity forecast revenue activity according to the business needs. For example, you might define forecast types of *Adjusted, Confirmed, Committed,* and *Open.* Forecast types are not predefined; typically, they vary considerably for different kinds of businesses.

Available on Opportunity Select to make the forecast type available on the opportunity pages where you define and update opportunities.

When this check box is cleared, the forecast type is available only on forecast pages, where it is typically used to categorize types of adjustment activities.

Defining Revenue Types

Access the Revenue Type page.

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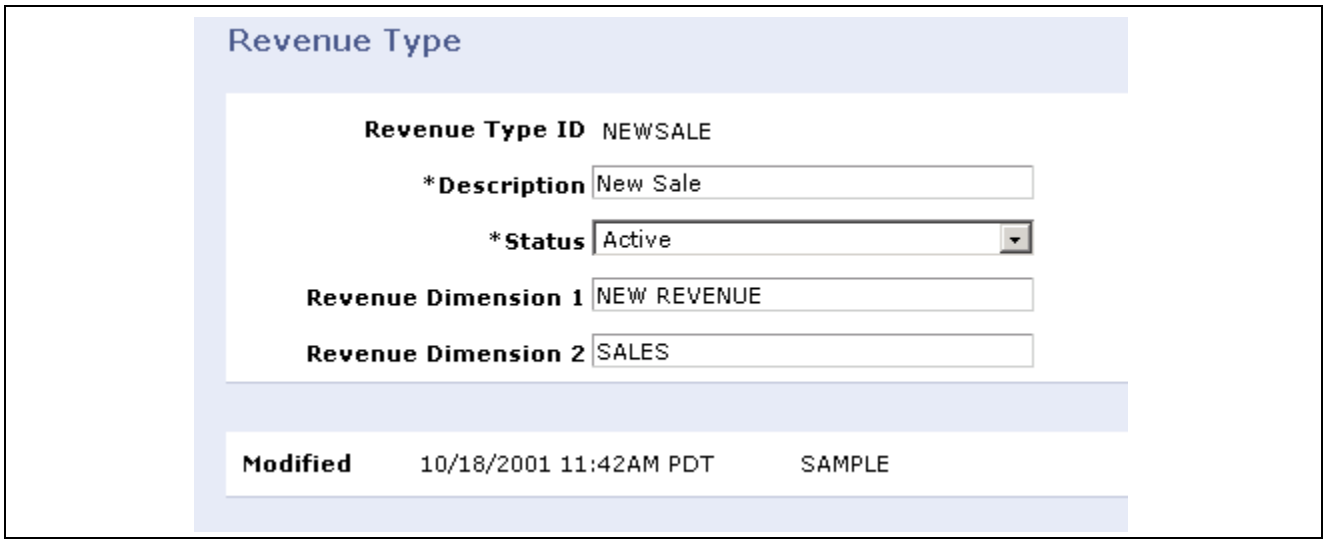

Revenue Type page

Revenue Dimension 1 and **Revenue Dimension 2**

Revenue dimensions provide a mechanism for consolidating revenue types to forecast revenue analysis. When many revenue types exist, you can group them by using revenue dimensions.

For example, one dimension might be the type of revenue (for example, *New, Upsell,* or *Repeat*) and the other dimension might be the type of product or service (for example, *License, Warranty,* or *Maintenance*).

- If the revenue type ID is *New License,* you might have dimensions of *New Revenue* and *License.*
- If the revenue type ID is *Warranty Add On,* you might have the dimensions of *Upsell* and *Warranty.*
- If the revenue type is *Renew License,* you might have the dimensions of *Repeat Revenue* and *License.*

When reviewing forecasts, you can generate subtotals for revenue types and revenue dimensions.

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PART 2

Working with Territories

Chapter 7
Configuring Assignment Criteria

Chapter 8
Creating Territory Trees

Chapter 9
Reorganizing or Deleting a Territory Tree

CHAPTER 7

Configuring Assignment Criteria

This chapter provides an overview of assignment groups and discusses how to configure lead, opportunity, and account assignment criteria.

Understanding Assignment Groups

An assignment group contains the criteria that the system uses to determine how to assign sales representatives to a lead or opportunity. After you create an assignment group, you can associate the assignment group with a territory tree. When a sales user adds a lead or opportunity and clicks the Assign Sales Rep button, the system uses the assignment group that is associated with the territory tree to select the sales representative and team. The system uses the following steps:

1. It selects one or more appropriate territories by evaluating the lead or opportunity.

   The system bases this evaluation on user-defined criteria and weights entered for the assignment group. The criteria might include the customer, product, region, and industry. The system uses these criteria and weights to generate a score for each territory.

2. If you specify manual selection on the assignment group, the system allows the user to choose a sales representative or team from a list that contains representatives or teams from the selected territories only.

3. If you specify automatic selection on the assignment group, the system evaluates the user-defined options for the assignment group to assign a sales representative or team from the selected territories.

This table illustrates the possible assignment configurations that you can enter for an assignment group:

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AssignmentConfigurations					Business Unit Restriction?	
					Yes	No
Single Territory	SingleRep		Automatic	PrimaryRep		
				RoundRobin-Time		
				RoundRobin-Availability		
			ManualSelection			
	WholeTeam		Automatic			
			ManualSelection			
Multiple Territory	Single Team	Single Rep	Automatic	RoundRobin-Time		
				RoundRobin-Availability		
			ManualSelection			
		Whole Team	Automatic	RoundRobin-Time		
				RoundRobin-Availability		
			ManualSelection			
	All Teams	Single Rep	Automatic	PrimaryRep		
				RoundRobin-Time		
				RoundRobin-Availability		
			ManualSelection			
		Whole Team	Automatic			
			ManualSelection			

Lead and opportunity assignment configurations

The following examples show how the system assigns the sales representative if you use the following assignment group settings:

- *Multiple Territories - 2 :* Search the tree to find the territories to which the sales representative is assigned.

  The two territories that most closely match the matching criteria are searched.
- *All Teams:* Within each territory in the top two weighted territories, the system identifies all sales representatives assigned .
- *Single Rep:* From each territory team, the system lists only one representative.
- *Primary Rep:* The primary representative from each top-weighted territory is selected.

  The system then identifies only the first representative in the list of possible primary representatives as the primary representative for the lead or opportunity team.
- *No Business Unit Restriction:* The system assigns the item to the primary representative who, because no restriction exists, might or might not be in the same business unit as the current sales representative.

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Consider a single tree for which the system determines the territories that are best suited to receive the assignment, based on the defined criteria and weights. The system finds the most suitable single representative or whole team by using the specified methods.

This table lists the data in the system and the criteria that the system uses to select the most suitable territories for the assignment:

Territory	Total Weight	Product	Weight	Region	Weight	Industry	Weight
Western	9	Freezers	5	West	4		
Eastern	5	Refrigerators	5				
Northern	3					Computers	3

Territory

- For a single territory, the system selects *Western* because, with a total weight of 9, it is the highest weighted territory.
- For multiple territories, by default the system uses the two best suited territories, but you can increase the number of territories. Assume that the system uses the default number of territories. In this case, the system selects the territories of *Western,* with a total weight of 9, and *Eastern,* with a total weight of 5.

Note. For multiple territories, you can have the system search within a single team (group of sales representatives in a given territory) in each territory that matches the assignment criteria with the highest total weight, or you can have the system search within all teams or groups of sales representatives associated to multiple territories that matched the assignment criteria with the highest total weight .

In the single-territory scenario, the system uses the Western territory data, as described in the following table, to select the most suitable single representative or whole team within that territory:

Territory	Sales Representative	Last Assigned Date	Availability Count	Primary in Team?
Western	ABC	6/1/2002	10	Yes
Western	LMN	5/1/2002	2	No
Western	XYZ	4/1/2002	8	No

Based on the modes and options specified, the system returns the following values:

Automatic Assignment For each option in the automatic assignment mode, the system returns the following values:

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- Primary Rep: The system selects *ABC* because this representative is designated as the primary team member.
- Round Robin, Time: The system selects *XYZ* because, with a last-assigned date of April 1, 2002, this representative has waited the longest without a new assignment.
- Round Robin, Availability: The system selects *LMN* because, with only two leads, this representative has the highest availability.

Manual Assignment

The system finds the single territory of *Western* as well as its sales representatives—*ABC, LMN,* and *XYZ.*

Select the sales representatives to assign.

Here is another example. Consider a tree on which territories overlap. The system determines which territories in the territory tree are most suited based on common factors and the defined criteria and weights. It also finds the most suitable single representative or whole team using the specified methods.

This table lists the data in the system and the criteria from which the system must select the matrix territory most suitable for the assignment:

Territory	Total Weight	Product	Weight	Region	Weight	Industry	Weight
Osborne Western	9	Pianos	5	West	4		
Osborne Trucking	7	Pianos	5			Trucking	2
Trucking	2					Trucking	2

Territory

The system selects *Osborne Western* and *Osborne Trucking* because these are the highest weighted territories with common factors. Together, they form the matrix organization of *Osborne* and the matrix product of *Pianos.*

The system then uses the matrix territory data, which is listed in this table, to select the most suitable single representative or whole team within the territory:

Territory	Sales Representative	Last Assigned Date	Availability Count	Primary in Team?
Osborne Western	A	6/1/2002	2	Yes
Osborne Western	B	5/1/2002	1	No

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Territory	Sales Representative	Last Assigned Date	Availability Count	Primary in Team?
Osborne Trucking	AA	5/1/2002	8	Yes
Osborne Trucking	BB	5/16/2002	6	No

The system must review all teams in the multiple territories. Based on the specified modes and options, the system returns values.

Return Search Results for

For the automatic assignment mode, the system returns the following values for each option:

- Single Rep: The system selects one candidate for each team.

  The system selects *A* and *AA* because these are designated as the primary team members for each territory.

  - Primary Rep: The system selects *A* as the primary matrix team member because this representative is the first in the list.
  - Round Robin, Time: The system selects *B* and *AA* because these representatives have waited the longest on their teams without a new assignment.
  - Round Robin, Availability: The system selects *B* and *BB* because these representatives have the least number of assignments on their teams and, therefore, have the highest availability.
- Whole Team: The system selects the whole team from each territory.

  The system selects *A, B, AA,* and *BB*. It adds the whole team to the lead's sales team and selects *A,* the first representative in the list, as the primary sales representative for the sales team.

Manual Assignment

The system finds the multiple territories of *Osborne Western* and *Osborne Trucking,* as well as all members of each team—*A, B, AA,* and *BB*. Select the sales representatives to add to the sales team, and select the primary sales team representative. You can have only one primary.

Configuring Assignment Criteria

This section discusses how to:

- Create assignment groups.
- Identify component records to use.
- Define criteria and their weights.

To configure assignment groups, use the Configure Assignment Groups (RSF_ASSIGN_CONFIG) component.

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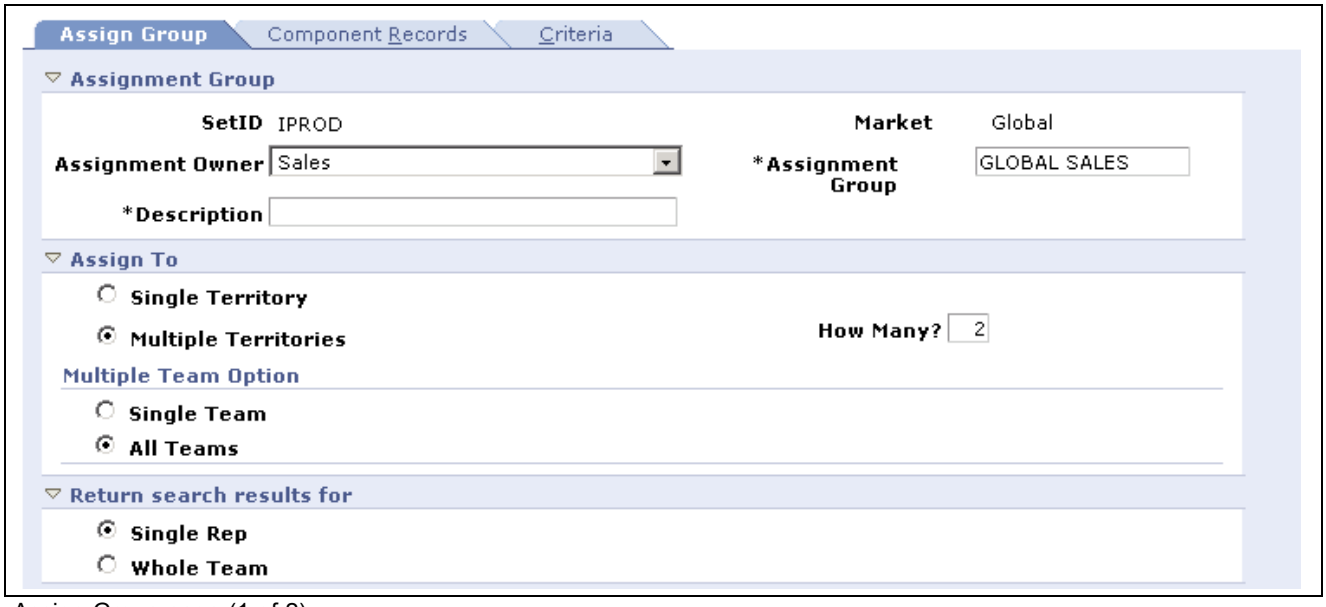
Pages Used to Configure Assignment Criteria

Page Name	Object Name	Navigation	Usage
Assign Group	RSF_ASSIGN_GROUP	Set Up CRM, Product Related, Sales, Territory, Configure Assignment Groups	Identify parameters for assigning leads or opportunities within a specified group.
Component Records	RSF_ASSIGN_RECS	On the Assign Group page, select the Component Records tab.	Identify components for defining a tree and its territories, and define records and fields for the round-robin assignment method.
Criteria	RSF_ASSIGN_CRIT	On the Assign Group page, select the Criteria tab.	Identify weighted search and match criteria to find candidates for assignment.
Component	RSF_ASSIGN_COMP	On the Criteria page, click the Component link.	Determine which components use the specified field.

Creating Assignment Groups

Access the Assign Group page.



Assign Group page (1 of 2)

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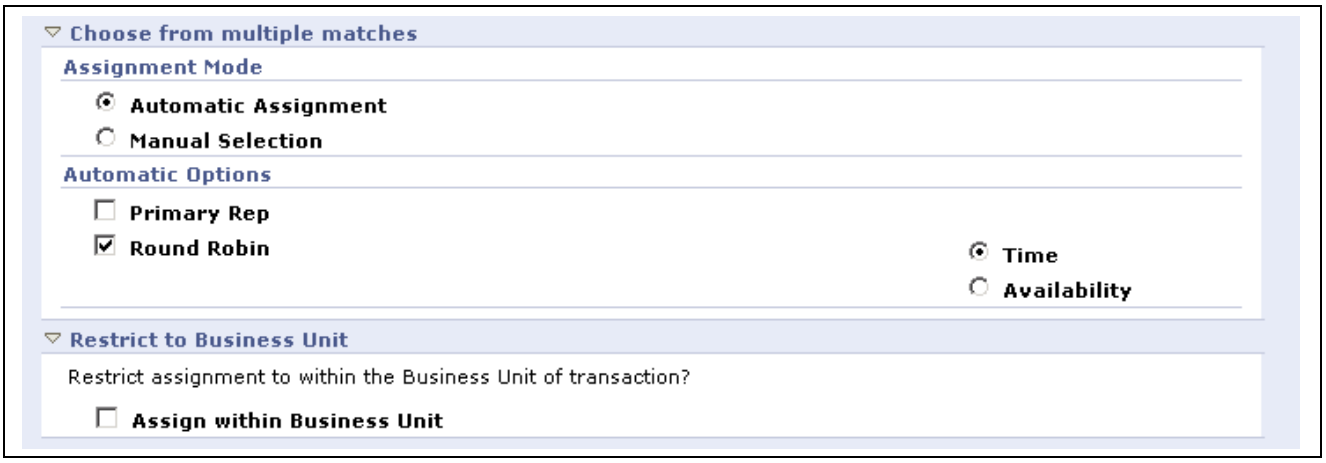

Assign Group page (2 of 2)

Assignment Group

Assignment Owner Select an owner for the assignment group. Select *Sales* if you use the assignment group to assign sales representatives to leads and opportunities. Select *Account Management* if you use the assignment group to assign sales representatives to accounts.

If you select *Account Management,* the system sets the following defaults and makes the fields unavailable for editing:

- Assign To: *Single Territory*
- Return search results for: *Entire Team*

Assign To

Single Territory Select to have the system assign sales representatives or teams in the single top-weighted territory.

Multiple Territories Select to have the system assign sales representatives or teams in multiple top-weighted territories.

How Many? If you select Multiple Territories, enter the number of territories to search.

Single Team or **All Teams** If you select Multiple Territories, you can select Single Team to assign representatives only from within the single team that best fits the assign criteria, or you can select All Teams to assign representatives from within all teams that match the assignment criteria.

If you select Multiple Territories, the system selects All Teams by default. You can override this setting.

Return search results for

Single Rep (single representative) Select to make the assignment to a single territory team member of the specified territory.

Whole Team Select to make the assignment to all territory team members of the specified territory.

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Note. PeopleSoft Enterprise Sales uses territory teams, sales teams, account teams, and lead or opportunity teams. The territory team, which is the team that you use here, is the group of individual sales users who are assigned to a territory.

Choose from multiple matches

Use the Assignment Mode group box to select the assignment mode.

Automatic Assignment Select to allow the system to assign leads or opportunities within the assignment group.

When you select this option, the Automatic Options group box becomes available.

Manual Selection Select to enable sales users to assign leads or opportunities manually within the assignment group.

When you select this option, search results are listed as candidates for assignment when the user clicks the Find Sales Rep (find sales representative) button on the Lead - Assign or Opportunity - Assign page.

Note. To enable sales users to assign sales representatives manually to leads or opportunities, you must select the Manual Selection check box, and select the Manually Reassign Leads, Manually Reassign Opportunities, and the assignment group Manual Selection check boxes on the Sales Access profile.

Use the Automatic Options group box to evaluate multiple matches automatically to narrow the selections to a single representative. This area is unavailable if you select any of these options:

- Manual Selection.
- Single Territory and Whole Team.
- Multiple Territories, All Teams, and Whole Team.

Primary Rep (primary representative) Select to have the system evaluate the territory team and select only the team member who is designated as the primary member on the Territory page.

Round Robin and **Time** or **Availability** Select to have the system evaluate the territory teams to select candidates based on either time or availability parameters.

- Select Time to identify the sales representatives who have waited the longest without a recent assignment, according to the record and field set on the Round Robin - Last Assigned tab on the Component Records page and the time stamp on the Territory Definitions page.
- Select Availability to identify, according to the record and field set on the Round Robin - Availability tab on the Component Records page, the representatives who have the least number of leads or opportunities assigned to them with the following status:
  - For leads, the status of *New, Open, Accepted, Referred, Imported, Working, Converted to Opportunity, Rejected, Deferred* or *Turnback.*
  - For opportunities, the status of *Open.*

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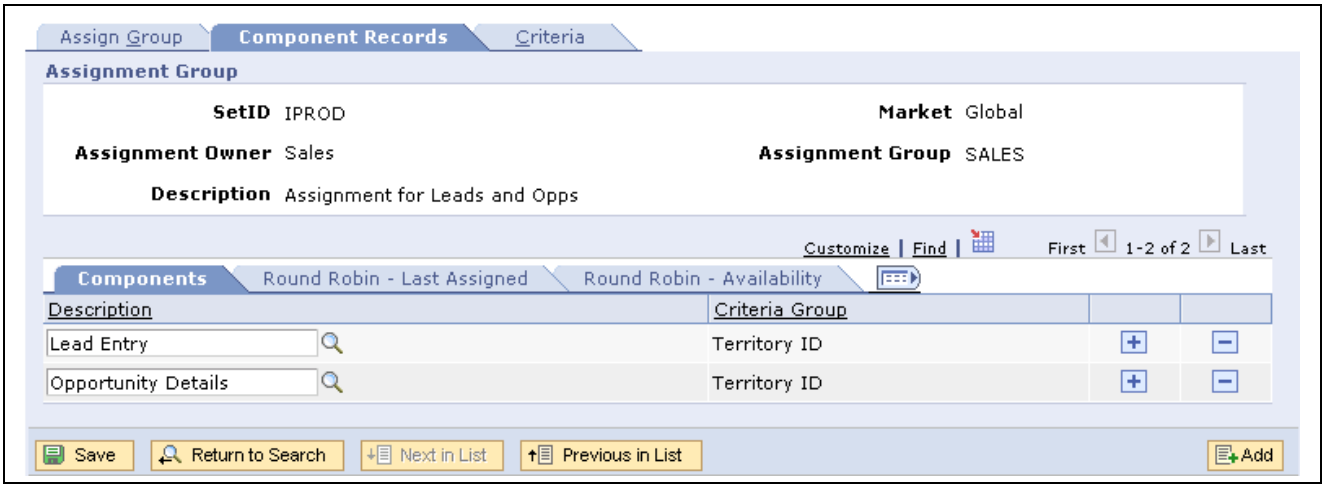
Restrict to Business Unit

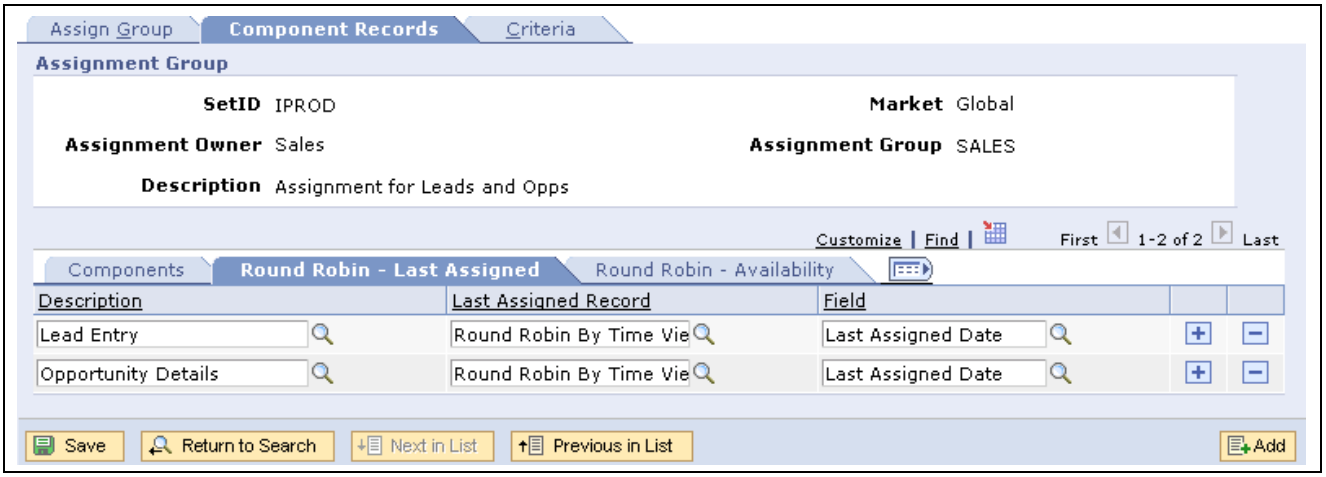
Assign within Business Unit Select to permit assignments only to sales representatives in the same business unit as the business unit to which the lead or opportunity belongs.

Identifying Component Records

Access the Component Records page.



Component Records page: Components tab



Component Records page: Round Robin - Last Assigned tab

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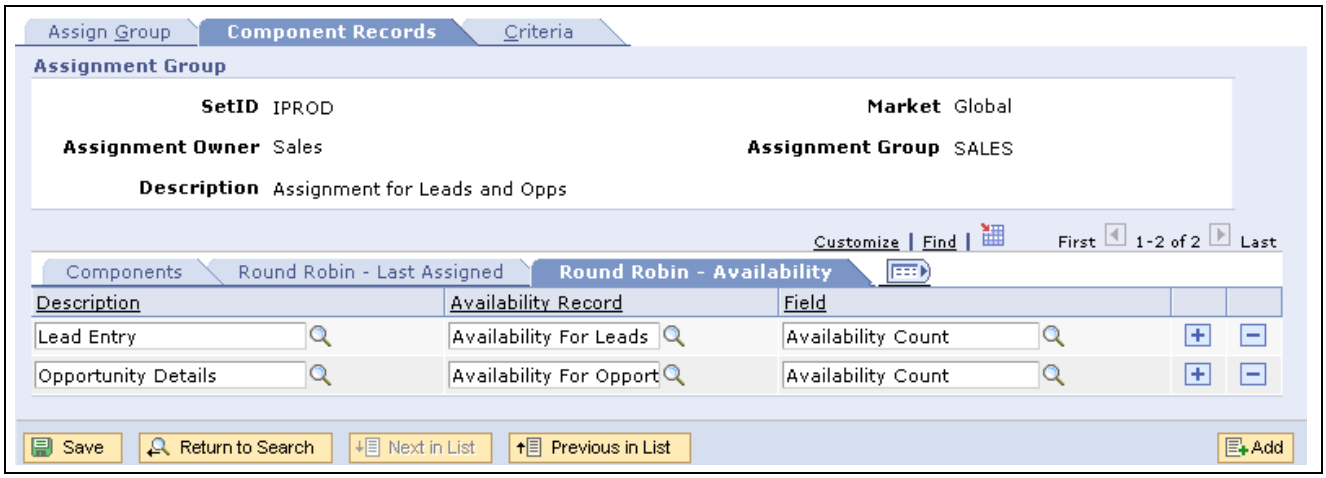

Component Records page: Round Robin - Availability tab

Components Tab

Description Enter the components to use for the assignment group. The components that you enter appear on the Round Robin - Last Assigned and Round Robin - Availability tabs, and they populate the Components field on the Criteria page.

Round Robin - Last Assigned Tab

Last Assigned Record and **Field** Enter the record and field to use in the specified component to determine which representative has waited the longest without a recent assignment.

The last-assigned date in the Lead Entry and Opportunity Details components is used in the Round Robin - Time assignment method. The time stamp on the Territory Definitions page is initially set to *01/02/1000,* and it is updated each time that a sales user is assigned to the territory and each time that a lead or opportunity is assigned to that individual.

See Chapter 8, "Creating Territory Trees," Creating or Editing Territories, page 99.

Round Robin - Availability Tab

Availability Record and **Field** The system counts the available leads and opportunities. Enter the record and field for the system to use (from the specified component) to determine which representatives have the least number of leads or opportunities assigned to them.

Defining Criteria and Their Weights

Access the Criteria page.

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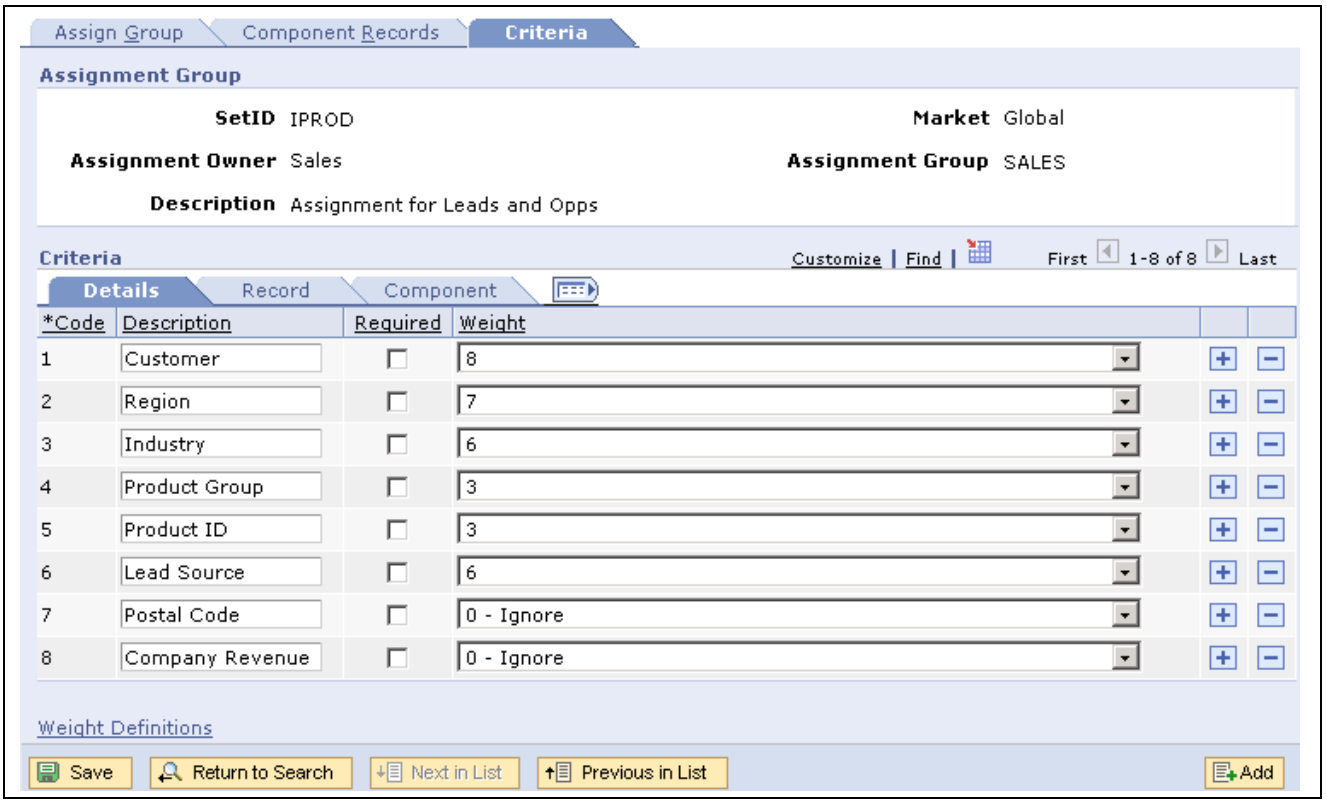
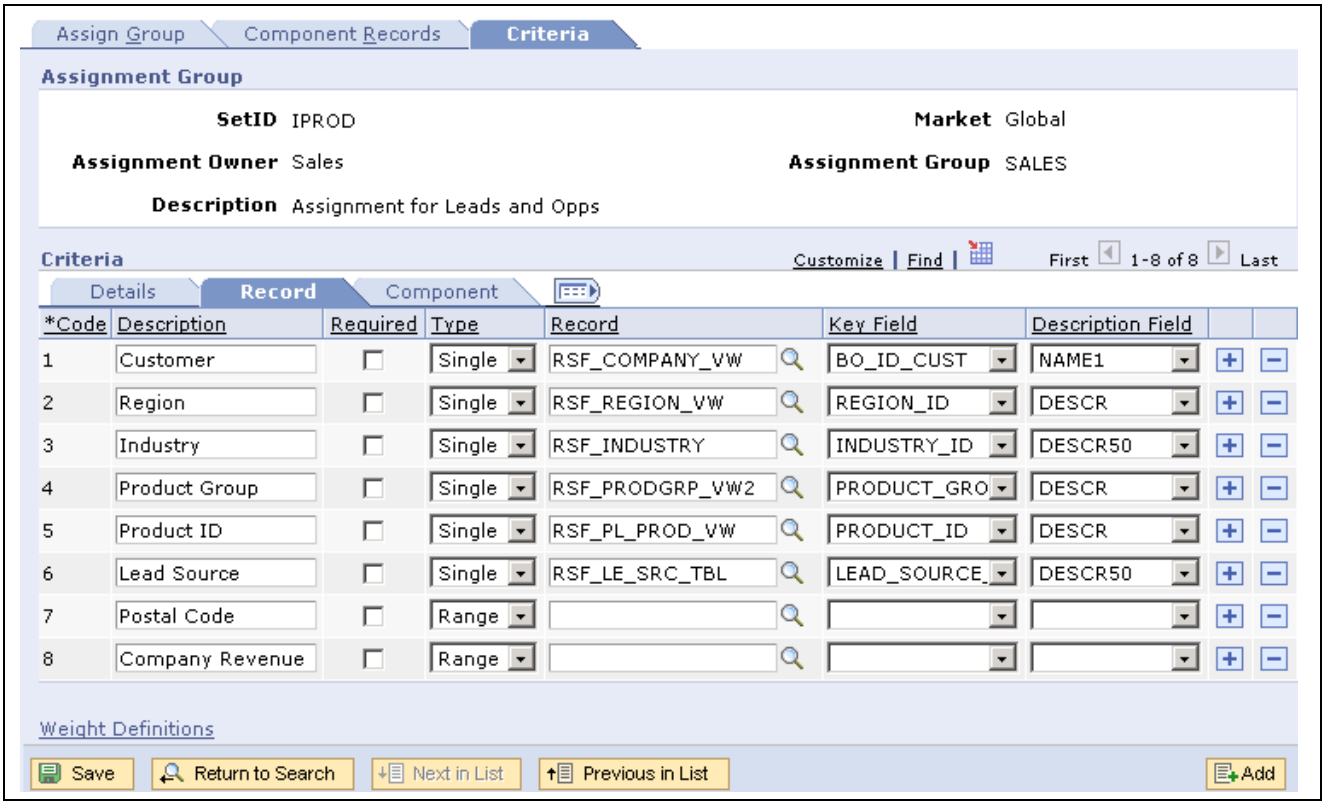


Criteria page: Details tab



Criteria page: Record tab

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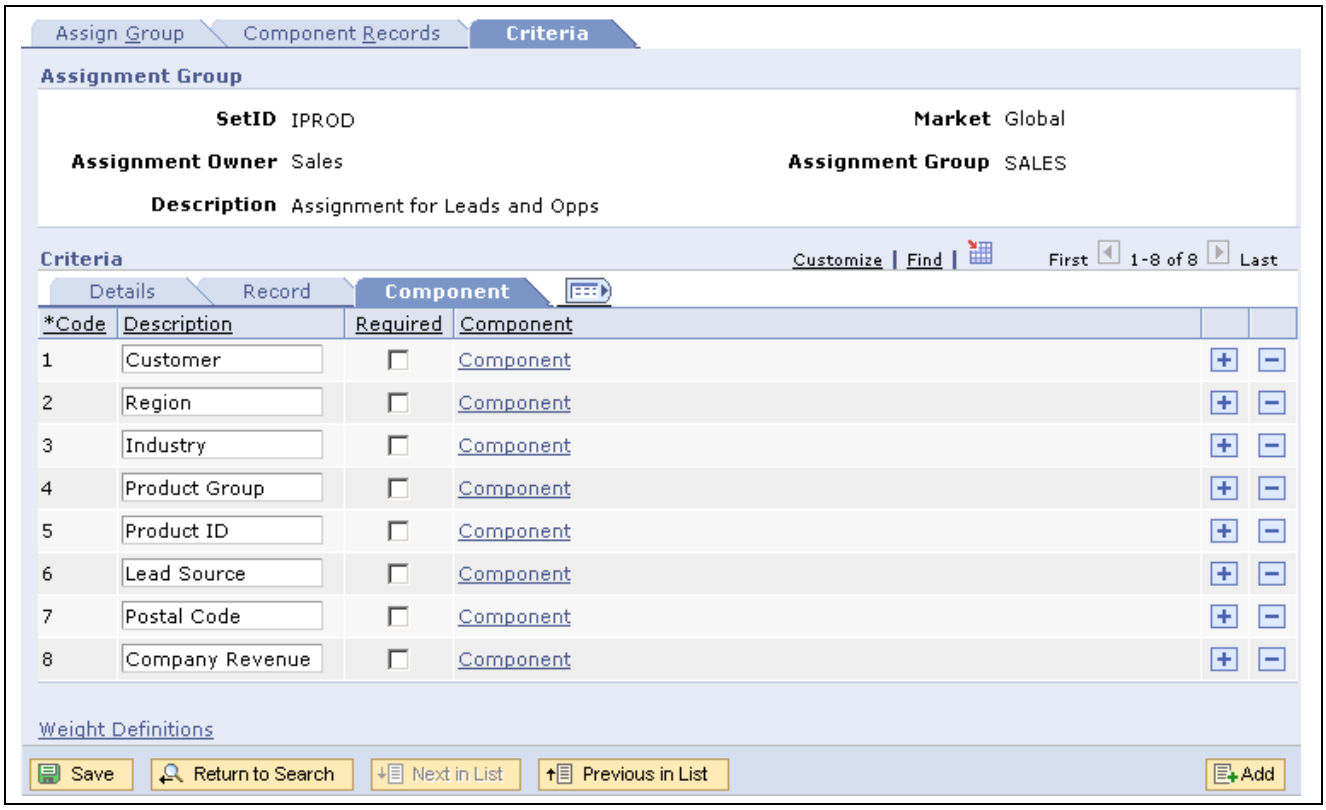

Criteria page: Component tab

Weight Definitions Click to access the Assignment Weights page to specify the weights that you can give to assignment criteria or to add new weights to the assignment group.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Assignment Weights, page 42.

Details Tab

Code and **Description** Enter a code and description for the criteria used for the assignment group.

Required Select to identify data that must exist to allow an assignment.

For example, if you indicate that a product ID is required and you do not specify a product ID, when you click the Find Sales Rep button on the Lead - Assign or Opportunity - Assign page an error message appears indicating that a required criterion (product ID) is missing and that you must enter required criteria before the system can make the assignment.

Required data must have an assigned weight. The default assigned weight is *0 - Ignore*. Typically, you change the default weight for required data.

Warning! You must identify required data and assign weights for all required data.

Weight Specify the importance of criteria when the system makes a match.

Some weight lists have anchors—that is, low, middle, and high values—with other values in between. For example, the predefined weights for the SHARE setID (as shown in the example) are in increments of one (0, 1, 2, 3, 4, 5, 6, 7,

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8, 9). These weights have anchors of *0 = Ignore, 1 = Least Important, 5 = Important,* and *9 = Most Important.*

Click the Weight Definitions link to determine weight definitions.

Record Tab

Type

Select to specify whether a single value or a range of values is permitted for a match.

For example, suppose that you want to search for representatives who work with a particular customer (as the logged in sales user or specified sales representative information). In that case, you would select the customer type *Single.* To have the system to search for representatives within a range of postal codes, select the postal code type *Range.*

Specify the beginning and end of a range on the Territory Definitions page.

Note. Currently, the system does not process dates as criteria ranges.

See Chapter 8, "Creating Territory Trees," Creating Territory Trees, page 97.

Record and **Key Field**

Enter the specific record and field that the system uses when prompting for the criteria data that is available for an assignment group.

Component Tab

Component

Click to access the Component page to view the components that use the criteria field and to determine the location in the component buffer from which the criteria field comes.

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CHAPTER 8

Creating Territory Trees

This chapter provides an overview of territory trees and discusses how to:

- Create territory trees.
- Run the Sales Access Update process.

Understanding Territory Trees

A territory tree is a model of the sales structure. The structure of the territory tree depends on how you structure sales activities. A company can segment its sales activities by product lines, geographic regions, customer accounts, industries, partners, or other criteria. A territory in a territory tree represents a segment of the sales activities. Many companies segment their sales geographically. For example, a company might divide a state into a northern region and a southern region, and define a territory for each region. However, a territory does not have to represent a geographic region. If you structure sales activities by industry, three territories might exist in the tree representing, for example, the manufacturing, insurance, and transportation industries. If you have licensed PeopleSoft Strategic Account Planning, you can have territories represent different company accounts. If you have licensed PeopleSoft Partner Relationship Management (PeopleSoft PRM) for Sales, you can have territories represent different partner companies.

Territory trees are hierarchical and can contain multiple levels. This diagram shows an example of a territory tree for a European sales organization:

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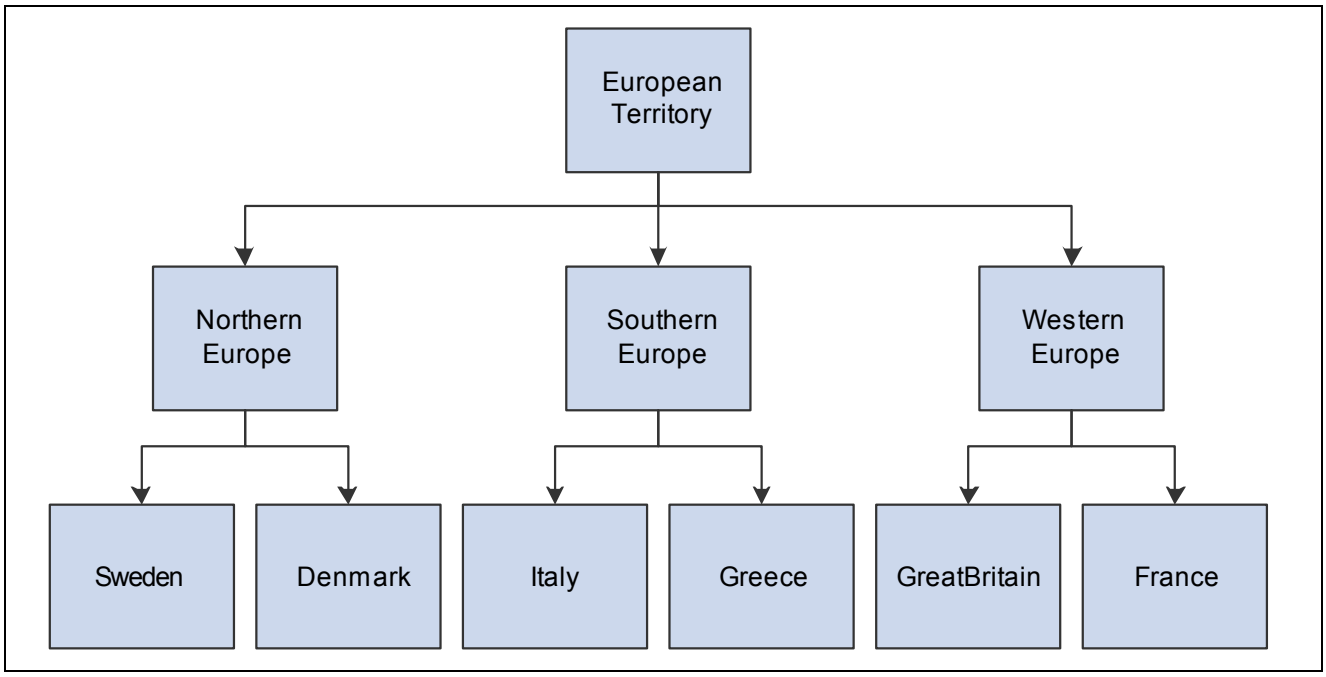

Territory tree for a European sales organization

PeopleSoft Enterprise Sales uses territory trees to:

- Assign leads and opportunities to sales representatives.
- Determine a user's ability to view leads, opportunities, and forecasts.
- Roll up sales forecasts.

Before the system can use a territory tree to assign leads and opportunities to sales representatives, you must assign at least one sales representative to each territory. Note that you can assign multiple sales representatives to a territory and then have the system select a representative for each lead or opportunity.

In addition, you must define specific values for the assignment criteria of each territory. For example, to have the system assign leads and opportunities to the France territory based on the geographic region, you must specify *Region* as a criteria code and *France* as the criteria value.

See Chapter 7, "Configuring Assignment Criteria," page 81.

To provide a manager with visibility to sales data for a particular territory, you must associate the manager with the territory. When you associate a manager with a territory, the manager can view leads, opportunities, and forecasts for that territory and the territories that are subordinate to the territory. In the preceding example, if a manager is associated with the Western Europe territory, then the manager can view sales data for Western Europe and the territories that Western Europe encompasses—Great Britain and France.

Note. A sales user (such as a manager) must have the proper sales access profile to view other users' data.

Note. Before you can create criteria to define a tree, you must set up setIDs and business units, and map them to the PeopleSoft Enterprise Sales RSF06 tableset record.

Setting up the sales territory tree for the assignment of leads using the criteria of Region only works when you define the same Region Code in both the Geography and Territory categories. Geography can be selected as the region code (Category Geographic code) for a customer and Territory is used in Territory tree Criteria definition (Category Territory code).

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See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Working with Business Units and TableSet Controls"

Creating Territory Trees

This section discusses how to:

- Create trees.
- Define trees.
- Create or edit territories.

To create territory trees, use the Create Territory Tree (RSF_TR_NEW_TREE) component.

To manage territory trees, use the Manage Territories (RSF_TR_MANAGER) component .

To create or edit territories, use the Territory (RSF_TERRITORY) component.

Pages Used to Create Territory Trees

Page Name	Object Name	Navigation	Usage
Create Territory Tree	RSF_TR_NEW_TREE	Set Up CRM, Product Related, Sales, Territory, Add Territory Tree, Create Territory Tree	Create territory trees.
Tree Manager	PSTREEMGR	• On the Create Territory Tree page, click the Create Territory Tree button. • Sales, Manage Territories	Define the hierarchical structure of territory trees.
Territory Definitions	RSF_TERRITORY	Click the Edit Data button on the Tree Manager page.	Define and update territories.

Creating Trees

Access the Create Territory Tree page.

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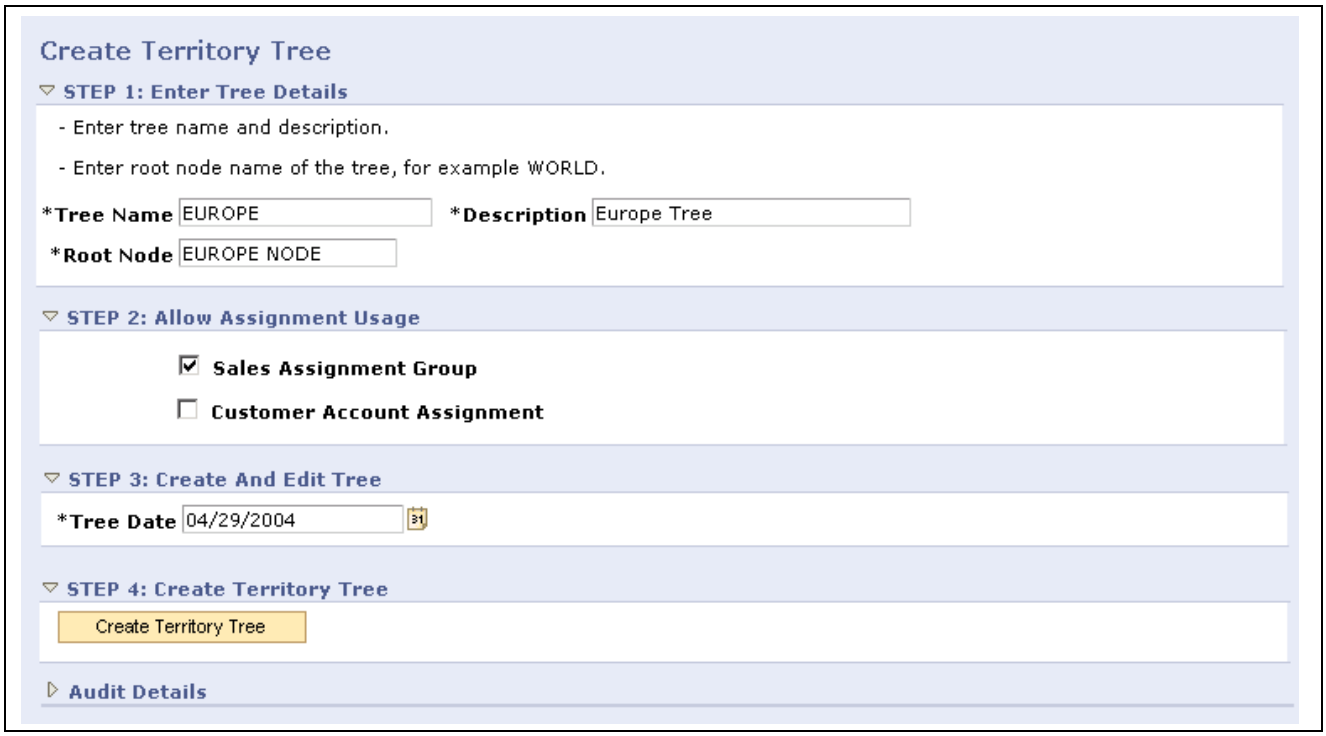

Create Territory Tree page

STEP 1: Enter Tree Details

Enter a tree name, description, and root node (the topmost territory level of the tree).

Tree names and effective dates are especially important when you create multiple trees. You can create two trees with the same name and the same root node; but only if they have different effective dates. You can also create two trees with different names but with the same root node.

For example, you might create one tree with the name of the organization and another tree with the name of a subsidiary. The root node for both trees might be World, because that is the broadest possible territory that each covers. However, if a tree with the same name and same root node already exists with that effective date, the system displays an error message.

STEP 2: Allow Assignment Usage

Sales Assignment Group — Select to enable the system to use the territory tree to assign sales representatives.

Customer Account Assignment — Select to enable the system to use the territory tree to assign account team members.

STEP 3: Create And Edit Tree

Effective Date — Enter the date when the tree becomes effective. Several trees can have the same name as long as they have different effective dates.

If you set an effective date in the future, run the Update Sales Access process on or after that date to change territory visibility settings.

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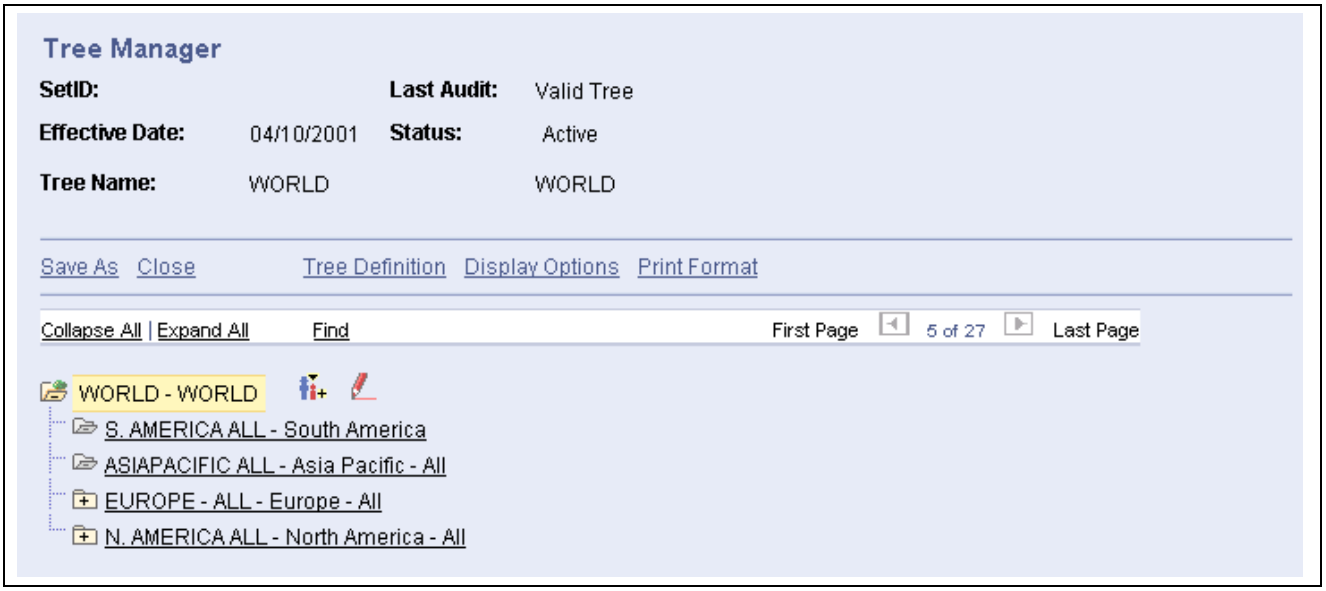
STEP 4: Create Territory Tree

Create Territory Tree Click to access the Tree Manager page to create nodes to add territories to the tree.

In PeopleSoft Enterprise Sales, when you create a node in Tree Manager and click the button with the pencil icon to edit the node, the system displays the Territory Definitions page.

Defining Trees

Access the Tree Manager page.



Tree Manager page

Use the Tree Manager page to add nodes and define territories.

Note. After you make changes to a tree, run the Sales Access Update process to apply the changes. The Sales Access Update process updates the access that sales users have in a territory tree and the structure for rolling up forecasts. However, it does not reassign leads or opportunities; use the reorganization or reassignment features of PeopleSoft Enterprise Sales for that purpose.

See Also

Chapter 9, "Reorganizing or Deleting a Territory Tree," page 103

Chapter 13, "Assigning a Lead or Opportunity," Reassigning a Sales Representative's Leads, Opportunities, and Accounts, page 165

Creating or Editing Territories

Access the Territory Definitions page.

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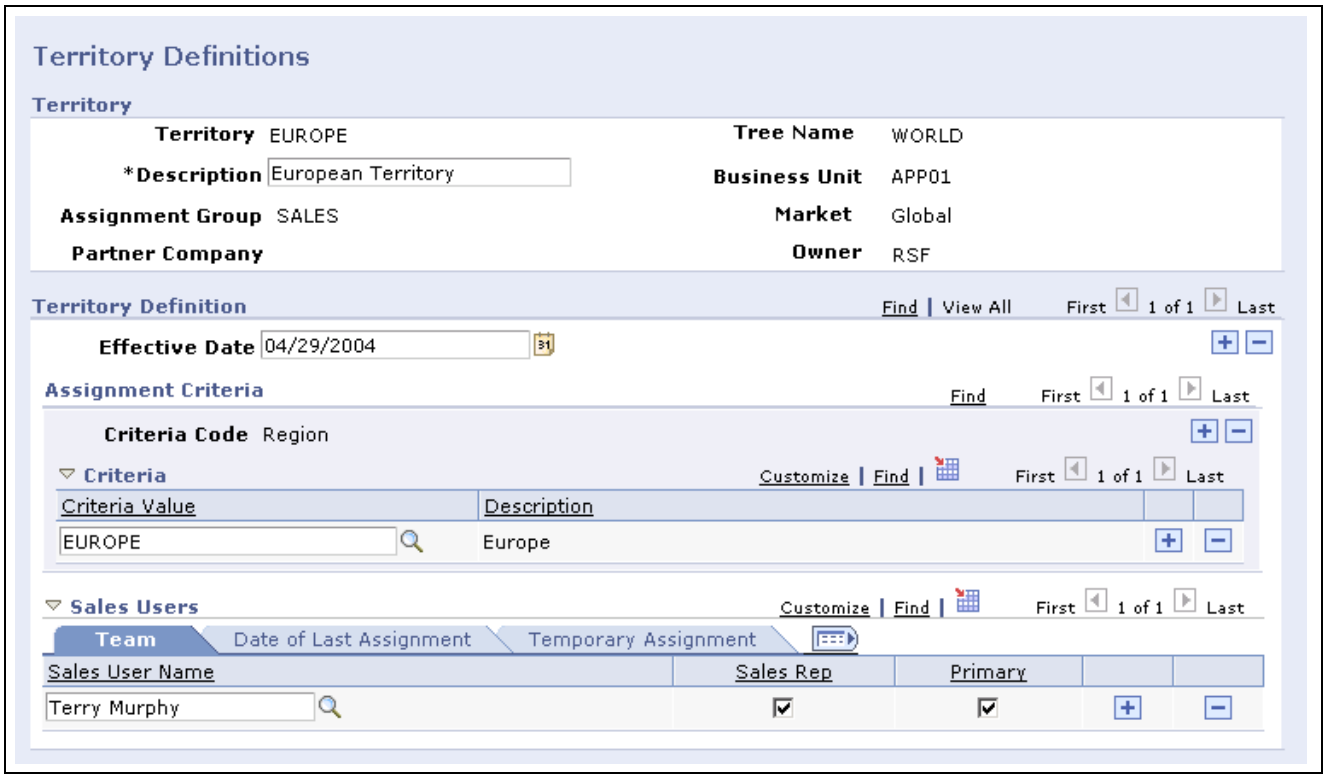

Territory Definitions page

Specify assignment criteria to define which leads or opportunities can be assigned to the territory.

Business Unit, Assignment Group, and **Market**

The system displays the business unit, assignment group, and market defined in the User Preferences component for the sales user who created the territory. If the system does not find an assignment group and market for the user, it displays the assignment group and market that are associated with the business unit on the Sales Business Unit Definition page.

Criteria Code

Select the assignment group's criteria (set on the Criteria page) to define which values are assigned to the territory.

For example, if the assignment group criteria includes *Customer, Product ID,* and *Lead Source,* you might specify that only *Customer* and *Lead Source* from the lead or opportunity are used to match to this territory.

Criteria Value

Enter values to use for the specified criteria.

For example, if you select the criteria code of *Customer,* you might specify that all leads from the customers *Johnson Brothers, Inc., ABC Corporation,* and *Acme Imports* are assigned to this territory.

If the criteria value permits a range, the From Criteria Value and To Criteria Value fields appear.

Note. Setting up the sales territory tree for the assignment of leads using the criteria of *Region* only works when you define the same Region Code in both the Geography and Territory categories.

From Criteria Value and **To Criteria Value**

Specify the beginning and end of the range of values to accept for the criteria value.

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For example, you can select a criteria code of *Product ID.*and specify a criteria value of *0001.* If you also want to accept products with IDs between 0001 and 0099, you would enter a From Criteria Value of *0001* and a To Criteria Value of *0099.*

Sales User Name Select a sales user to assign to the territory.

Sales Rep (sales representative) Select to have the system consider the sales user for assignment to a lead or opportunity if the system automatically assigns sales representatives. When a sales user is added to the territory team, the system automatically selects *Sales Rep.* If you don't want the system to assign leads and opportunities to the sales user, clear this check box. If you have PeopleSoft PRM installed, you must select this check box for lead assignment purposes although the partner sales representative is not required to be an actual sales user.

Note. If you add sales managers or sales administrators to a territory tree to give them visibility to sales representatives' leads and opportunities in the tree, you typically do not select the *Sales Rep* (sales representative) check box. To give a user visibility of other's leads and opportunities, you must assign the data distribution rules *View Leads as Manager* and *View Opportunities as Manager* to the user. You can set up data distribution rules on the Dataset Rules and Dataset Roles pages in the Enterprise Components menu.

See *PeopleSoft Enterprise Components for CRM 9 PeopleBook.*

Primary Select to identify a sales user as the primary sales representative for the territory. Each territory can have only one primary sales representative. The system uses this option when the assignment method indicates that items are assigned only to the primary representative.

Note. PeopleSoft Enterprise Sales has two types of *primary* representatives. One is the primary representative for the lead or opportunity team. The other, specified here, is the primary representative for the territory team.

Assigned TimeStamp When you click Apply to apply the territory to the tree, the system displays the date and time:

- If the *Sales Rep* check box is selected for a sales user, the system displays the generic date of *01/01/1900* with the time of *12:00:00 AM.*

  This indicates that the sales user was successfully added to the territory but has not been assigned a lead or opportunity. When a lead or opportunity is assigned to the sales representative, the system updates the date and time to reflect when the assignment takes place using the round robin, time assignment method.

- If the *Sales Rep* check box is cleared for a sales user, the system displays no date or time.

  This setting applies to sales users who are administrators, managers, executives, or in similar positions that are not eligible for lead or opportunity assignments but who require visibility to sales data.

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Temporary Assignment

If the primary sales user is temporarily unavailable due to vacation or some other reason, you can assign another sales user for a specific time period. For the sales user who is unavailable, enter the following information:

Date From Enter the beginning date for the temporary assignment.

Date To Enter the ending date for the temporary assignment.

Assigned To Select the sales user who is temporarily assigned to the territory during the time period.

Running the Sales Access Update Process

This section discusses how to run the Sales Access Update process.

To run the Sales Access Update process, use the Sales Access Update (RSF_ACCESS_RUN) component.

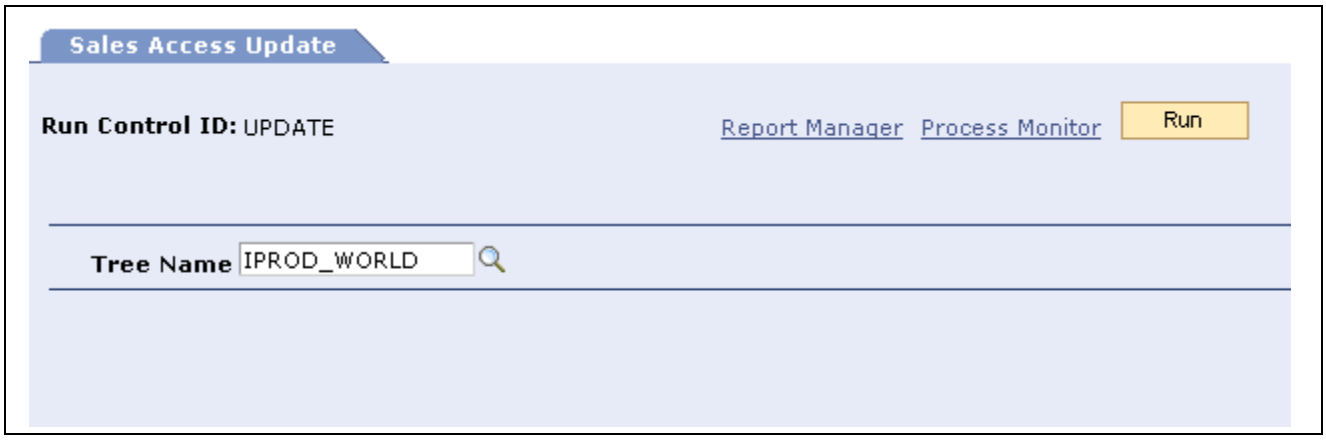
When you make changes that affect a tree, territory nodes, or a sales user's visibility of a tree, you must apply the changes and update security by running this process.

Page Used to Run the Sales Access Update Process

Page Name	Object Name	Navigation	Usage
Sales Access Update	RSF_ACCESS_RUN	Set Up CRM, Product Related, Sales, Security and Personalization, Sales Access Update	Run the sales access update process to apply changes to a tree.

Run the Sales Access Update Process

Access the Sales Access Update page.



Sales Access Update page

Select the tree that you want to update, and click Run.

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CHAPTER 9

Reorganizing or Deleting a Territory Tree

This chapter provides an overview of tree reorganization and discusses how to:

- Review reorganizations.
- Reorganize a territory tree.
- Delete trees or tree nodes.

Understanding Tree Reorganization

Occasionally, you may need to change the structure of a territory tree due to a reorganization or expansion of sales activities. For example, you might add or delete territories, or restructure a part of the territory tree. Use the tree reorganization process to make changes to a tree. Typically, you use the reorganization process to clone an existing tree and then make modifications to the new tree. You can give the new tree the same name as the existing tree, as long as you assign it a new effective date. Alternatively, you can give the new tree an entirely different name. You can then view and edit the new tree as needed. The system uses the tree with the most recent effective date as the default tree.

You reorganize territory trees by using the process template provided in the Reorganize Territories component (RSF_TR_REORG). Each step of the process is keyed to the completion of the previous step. Typically, system administrators run the tree reorganization process. Users with branch access to a territory can run the tree reorganization process for the territory. You can give system administrators access to specific branches within a tree.

Note. Branch access is distinct from territory visibility. A PeopleSoft Enterprise Sales user does not need branch access to access territories within a branch; the user needs only territory visibility.

When you reorganize territory trees, the system enables you to reassign the sales users for leads and opportunities. The reorganization process suggests a new territory and a new primary sales user for each lead or opportunity in a territory that you change or delete. When you clone a tree and make changes, you can generate a worksheet based on these changes so that you can see how the system would reassign the leads and opportunities. You can then override or adjust the changes, select which changes to accept, and then submit them to update the leads and opportunities.

In addition to the mass reassignment that is integral to reorganizing a tree, at any time you can individually reassign a representative's leads and opportunities to a different sales representative. For example, if the current representative is promoted or otherwise moved out of the sales representative position, that representative's leads and opportunities must be reassigned.

See Chapter 13, "Assigning a Lead or Opportunity," Reassigning a Sales Representative's Leads, Opportunities, and Accounts, page 165.

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The worksheets use predefined configurable assignment criteria to suggest the best fit for lead or opportunity reassignment. You might decide not to accept the system's suggestions; at this stage, you can make those changes. The reorganization worksheets are designed for fast performance, and they display a specified number of leads or opportunities.

The setup of the Configurable Search feature for the reorganization component returns a maximum of 300 leads or opportunities per search. The system displays a notification message if more than 300 are found. You may need to change this setting depending on the number of leads or opportunities that your sales force is handling at the time of reorganization. The system takes longer to present large result sets.

The Personalize Search feature is activated by default. It enables users to save searches and reuse them.

The Configurable Search feature can provide visual prompts about a search result set. At the top of the page, the system displays the criteria on which the result set is based. For example, if the data result set is filtered first by the lead assigned to the current representative (Stu Marx) and then by the new representative (Edward Allen), then this criteria would appear:

- Current Rep = *Marx, Stu Manager* AND
- New Rep = *Allen, Edward*

If you need to assign members of the results set to more than just Edward Allen, you can do so on this page.

Reviewing Reorganizations

This section provides an overview of reorganization review and lists the page used to review reorganizations.

Understanding Reorganization Review

The reorganization ID is one of the search criteria for the reorganization that you are reviewing. Because you might test a variety of structures while planning a reorganization, the system stores the structures under unique IDs. If you exclude the reorganization ID from a search or saved search, the resulting data sets might include information from any of the reorganization structures stored in the system. Always include the reorganization ID in the selected criteria on the Personalize Search page.

Page Used to View Reorganizations

Page Name	Object Name	Navigation	Usage
Reorganize Sales Activities	RSF_TR_REO_SRCH	Sales, Search Reorganizations	View a list of submitted territory reorganizations and enter search parameters.

Reorganizing a Territory Tree

This section discusses how to:

- Clone and reorganize a tree.
- Review reorganization worksheets.

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- Select the territory team and primary representatives.
- Submit the reorganization.
- View submitted reorganizations.

Pages Used to Reorganize a Territory Tree

Page Name	Object Name	Navigation	Usage
Reorg Territories	RSF_TR_REORG	Sales, Reorganize Territories, Reorg Territories	Follow the steps to reorganize territories on a tree.
Tree Manager	RSF_TR_MANAGER	Click the View and Restructure Territory Tree link on the Reorg Territories page.	View or make changes to a territory tree.
Tree Manager	PSTREEMANAGER	Tree Manager, Tree Manager	View or make changes to a territory tree.
Lead Reorganization	RSF_TR_REORG_LEAD	Sales, Reorganize Territories, Reorg Leads	Review and adjust the system's reassignment of leads in the new structure.
Lead Reorganization - Current Team	RSF_TR_LE_TEAM	Click the Current Team link on the Reorg Leads page.	Review a lead's current team before reorganization.
Lead Reorganization - New Team	RSF_TR_REORG_LETM	Click the New Team link on the Reorg Leads page.	Review and adjust a lead's new territory team after reorganization, and select the primary representatives.
Opportunity Reorganization	RSF_TR_REORG_OPP	Sales, Reorganize Territories, Reorg Opportunities	Review and adjust the system's reassignment of opportunities in the new structure.
Opportunity Reorganization - Current Team	RSF_TR_OP_TEAM	Click theCurrent Team link on the Reorg Opportunities page.	Review an opportunity's current team before reorganization.
Opportunity Reorganization - New Team	RSF_TR_REORG_OPTM	Click the New Team link on the Reorg Opportunities page.	Review and adjust an opportunity's new territory team after reorganization, and select the primary representatives.
Account Reorganization	RSF_TR_REORG_ACCT	Sales, Reorganize Territories, Reorg Accounts	Review and adjust the system's reassignment of accounts in the new structure.
Account Reorganization - Current Team	RSF_TR_ACC_TEAM	Click the Current Team link on the Reorg Accounts page.	Review an account's current team before reorganization.

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Page Name	Object Name	Navigation	Usage
Account Reorganization - New Team	RSF_TR_REORG_ACTM	Click the New Team link on the Reorg Accounts page.	Review and adjust an opportunity's new territory team after reorganization, and select the primary representatives.
Submit Reorg	RSF_TR_SUBMIT	Sales, Reorganize Territories, Submit Reorg	Follow the steps for submitting a territory tree reorganization.
Sales User	RSF_SUSER1	Click the Look Up Sales User link on the Submit Reorg page.	View or adjust each sales user's territory accessibility after reorganizing a tree.
Sales Access Update	RSF_ACCESS_RUN	Sales, Territories, Reorganize Territory Trees Click the Update Security Access link.	Run the Update Sales Access process to update security.
Reorganize Sales Activities	RSF_TR_REO_SRCH	Sales, Search Reorganizations	View a list of submitted territory reorganizations and enter search parameters.

Cloning and Reorganizing a Tree

Access the Reorg Territories page.

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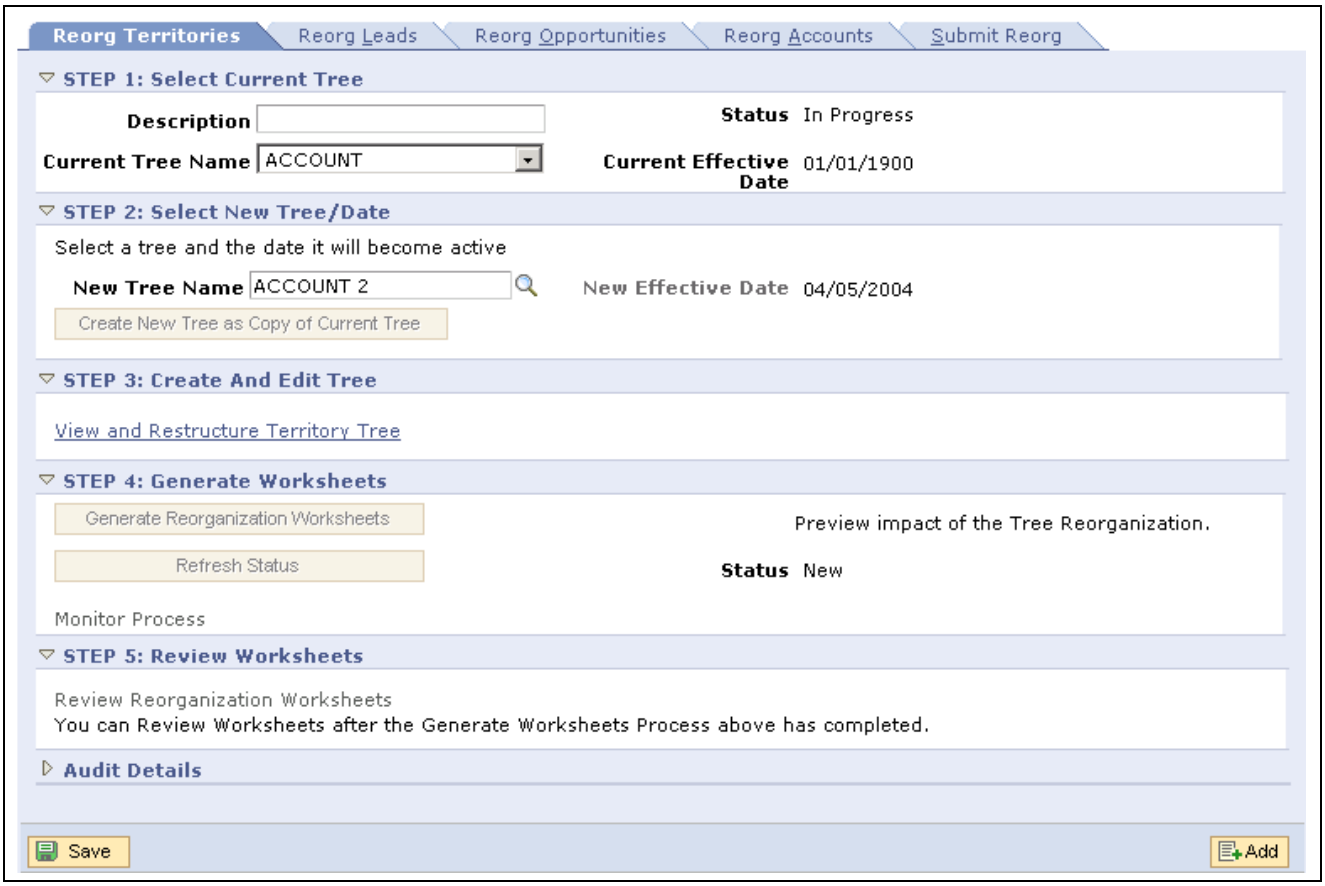

Reorg Territories page

Note. The links and buttons on this page become available dynamically as you complete the steps.

STEP 1: Select Current Tree

Current Tree Name

Select the tree to clone.

If the sales user is assigned to a single tree, the system displays the name of that tree and makes the field unavailable.

If the sales user is assigned to multiple trees, the tree name is available and the trees to which that user is assigned are available so that the user can select a tree.

Note. Sales users can clone or reorganize only trees to which they are assigned. Sales users can also reorganize only the leads and opportunities of the sales representatives that they can view on the territory tree.

For example, a sales administrator for the Europe tree can reorganize only the Europe tree, and that administrator can view only the European leads and opportunities on the reorganization worksheets.

See Chapter 4, "Setting Up Sales Security and Personalization," Defining a Sales User's Visibility, page 22.

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STEP 2: Select New Tree/Date

New Tree Name Enter or select the name for the tree that you are creating.

If you have access to multiple trees, you can select from those tree names or enter a new tree name.

New Effective Date Enter the date on which the new tree becomes effective. The system enters the current date as the effective date, which you can override.

You can enter a future effective date to allow yourself time to reorganize the tree, review the worksheets, and adjust the leads and opportunity assignments for sales representatives to which you have visibility on the new tree.

Create New Tree as Copy of Current Tree Click to clone the tree specified in the Current Tree Name field in the STEP 1: Select Current Tree group box and name it according to the name specified in the New Tree Name field.

The system copies the tree and makes the View and Restructure Territory Tree link available in the STEP 3: Create and Edit Tree group box.

STEP 3: Create and Edit Tree

View and Restructure Territory Tree Click to access the Tree Manager page, where you can create new nodes, delete nodes, and make other changes to the cloned tree.

Note. If you delete nodes, be sure to clean up the residual territory data.

See Chapter 9, "Reorganizing or Deleting a Territory Tree," Deleting Residual Territory Definitions From PeopleSoft Enterprise Sales, page 113.

STEP 4: Generate Worksheets

Run the Tree Reorganization process (RSF_TR_REORG).

Note. Before generating the worksheets, you must specify assignment groups for all accounts that are affected by the reorganization.

Generate Reorganization Worksheets This button is available only after you complete the previous step.

Click to reassign all of your leads and opportunities for the specified new tree and territory definitions, based on the assignment criteria configuration.

Worksheets enable you to view how the system reassigned the leads and opportunities based on the criteria. Worksheets also enable you to adjust the assignments, if necessary.

Refresh Status Click to refresh the status display.

Monitor Process Click to access the Process List page, where you can identify the status of the reorganization worksheet generation process to determine when it is completed.

When it is completed, the next step is available.

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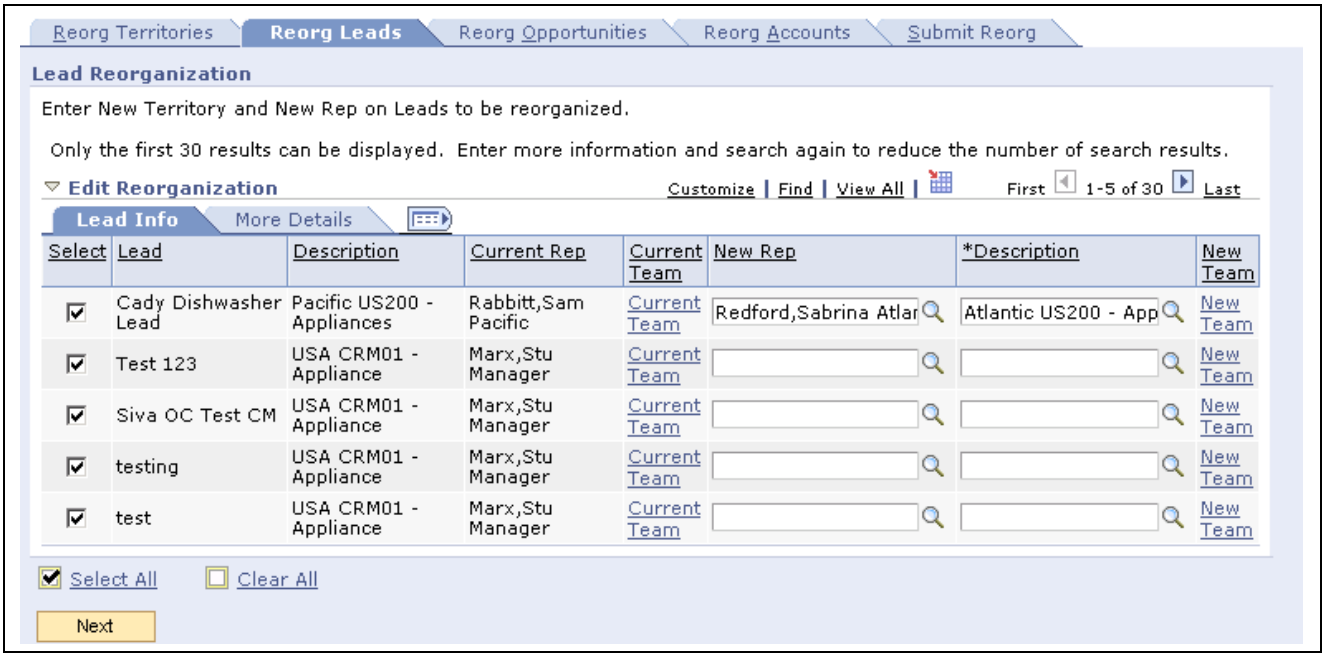
STEP 5: Review Worksheets

Review Reorganization Worksheets Click to review the worksheets that are generated by using the STEP 4: Generate Worksheets group box. You must review the lead, opportunity, and account reorganization worksheets in order. The Next button on each worksheet is programmed to move you to the next worksheet.

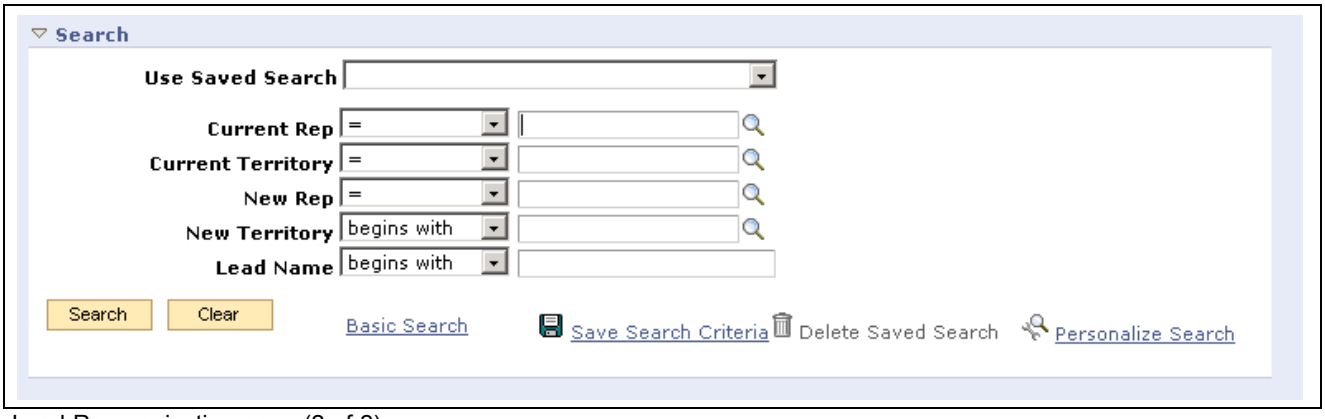
Reviewing Reorganization Worksheets

Access the Lead Reorganization page, the Opportunity Reorganization page, or the Account Reorganization page.

Note. This example shows the Lead Reorganization page. The Opportunity Reorganization and Account Reorganization pages are similar in appearance and usage.



Lead Reorganization page (1 of 2)



Lead Reorganization page (2 of 2)

Review the results of the system's reassignment of leads, opportunities or accounts in the new tree structure. Select new representatives to assign the items, if necessary.

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Select	Select each reassignment that you want to accept.
Current Team	Click to access the Lead Reorganization - Current Team, Opportunity Reorganization - Current Team, or Account Reorganization - Current Team page, where you can view the current team for the lead, opportunity, or account before reorganization. Viewing this page enables you to determine the changes that are required.
New Team	Click to access the Lead Reorganization - New Team, Opportunity Reorganization - New Team, or Account Reorganization - New Team page, where you can view the new team for the lead, opportunity, or account after reorganization. Viewing this page enables you to identify the sales representatives to add to the sales team. You can also use these pages to select the primary representative. Click OK for the system to update the new primary representative from this page to the leads, opportunities, or accounts.
Next	Click to access the Submit Reorg page, where you can click Submit Reorganization to complete the reassignments.

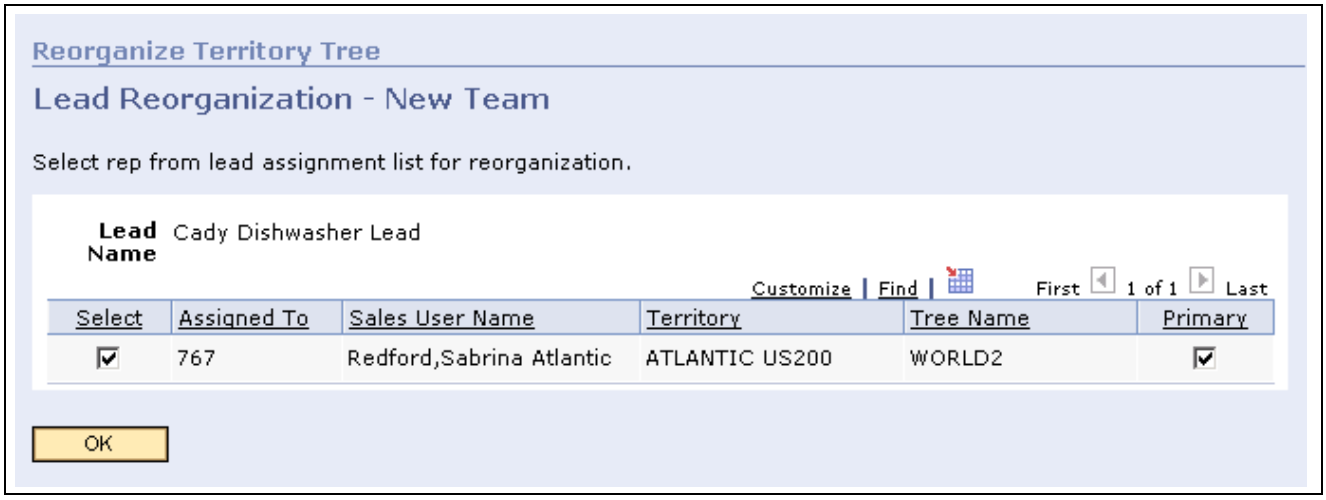
Using the Configurable Search

You can filter the search criteria to limit the information that appears on each worksheet. The delivered Configurable Search feature for territory tree reorganization enables you to filter searches based on the Current Rep, Current Territory, New Rep, New Territory, and Lead or Opportunity fields. Filtering a search based on these fields provides a focused set of leads and opportunities to review.

The Current Rep and Current Territory prompt values are based on the current tree. The Current Rep prompt values list the representatives who report directly to the manager or administrator responsible for processing reorganization. The New Rep and New Territory prompt values are based on the new tree. The New Rep prompt values enable a manager to assign leads and opportunities to representatives who might not be direct reports of that particular manager.

Selecting the Territory Team and Primary Representatives

Access the Lead Reorganization - New Team page, Opportunity Reorganization - New Team page, or Account Reorganization - New Team page.



Lead Reorganization - New Team page

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The Lead, Opportunity, and Account Reorganization - Current Team pages have a similar format to the New Team pages, but they are read-only.

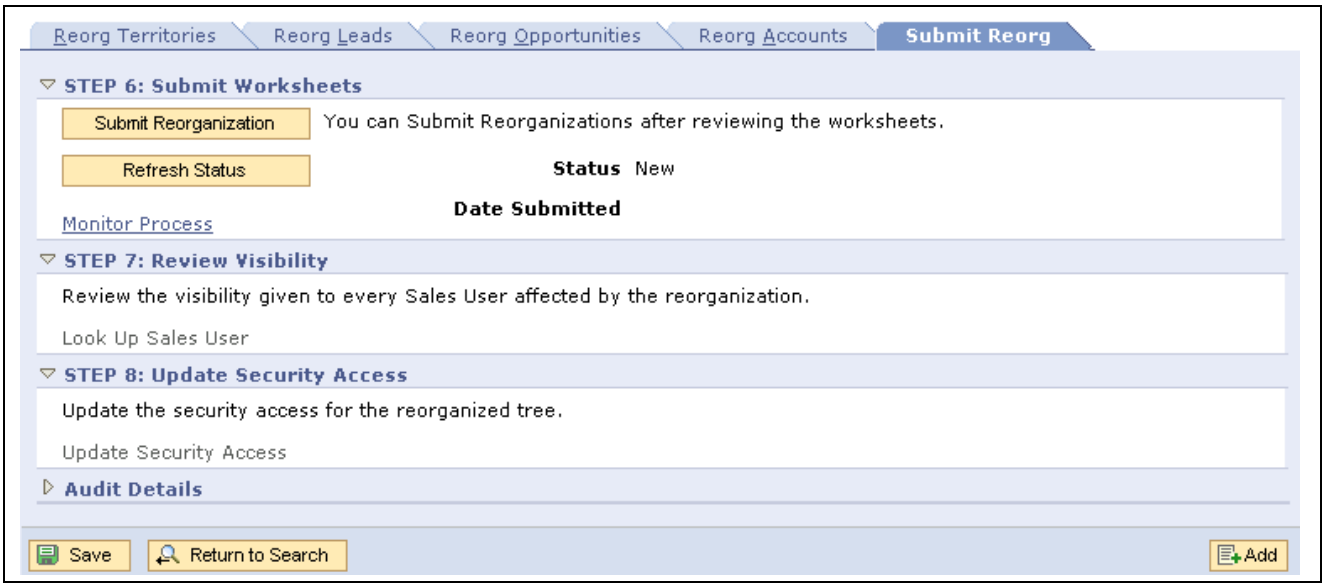
Select Select a check box for each member that you want to retain on the new team after the reorganization.

Primary Select to specify the primary sales representative for each territory. This column appears on the Lead Reorganization - Current Team, Lead Reorganization - New Team, Opportunity Reorganization - Current Team, and Opportunity Reorganization - New Team pages.

Owner Select to specify the account owner or owners. This column appears on the Account Reorganization - Current Team and Account Reorganization - New Team.

Submitting the Reorganization

Access the Submit Reorg page.



Submit Reorg page

STEP 6: Submit Worksheets

Submit Reorganization Click to apply the reorganizations from the worksheet to the leads, opportunities, and accounts by updating the new territory and sales representatives.

STEP 7: Review Visibility

Look Up Sales User Click to access the Sales User page for each sales user affected by the reorganization. View or adjust the user's territory visibility settings.

STEP 8: Update Security Access

Update Security Access Click to access the Sales Access Update page, where you can run the process to apply the changes and update the security settings.

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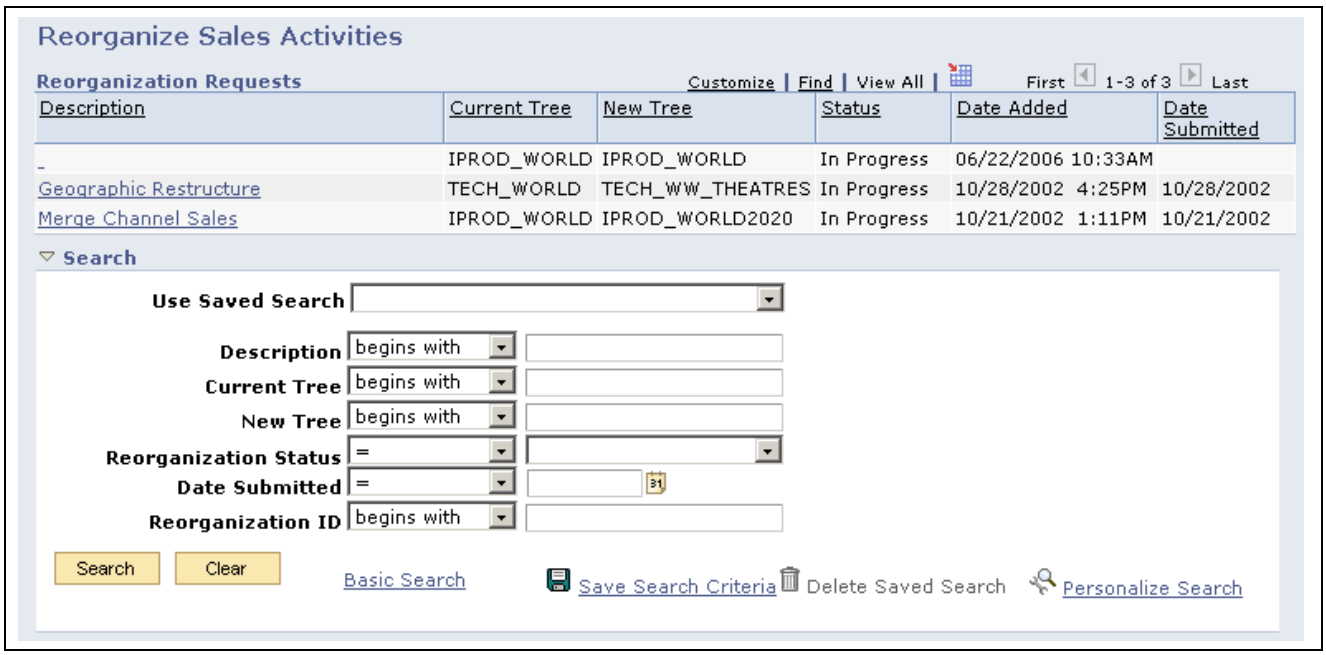
Viewing Submitted Reorganizations

Access the Reorganize Sales Activities page.



Reorganize Sales Activities page

The reorganization ID is one of the search criteria for the reorganizations that are listed on this page. Because you might test a variety of structures while planning a reorganization, the system stores the structures under unique IDs. If you exclude the reorganization ID from a search or saved search, the resulting data sets might include information from any of the reorganization structures stored in the system. Always include the reorganization ID in the selected criteria on the Personalize Search page for this search.

Deleting Trees or Tree Nodes

This section discusses how to:

- Use Tree Manager to delete tree items.
- Delete residual territory definitions from PeopleSoft Enterprise Sales.

Note. Be extremely cautious about deleting an entire tree. Generally, you delete an entire tree only if it is a draft that you created while practicing tree setup.

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Pages Used to Delete Trees or Tree Nodes

Page Name	Object Name	Navigation	Usage
Tree Maintenance	PSTREEMAINT	Tree Manager, Tree Utilities, Copy/Delete Tree, Tree Maintenance	Delete a tree.
Tree Structure Maintenance	PSTREESTRCMAINT	Tree Manager, Tree Utilities, Copy/Delete Tree, Tree Structure Maintenance	Delete tree nodes.
Delete Territory	RSF_TR_DEL_TREE	Set Up CRM, Product Related, Sales, Territory, Delete Territory	Delete residual tree and territory data from the application after deleting trees or nodes in Tree Manager.

Using Tree Manager to Delete Tree Items

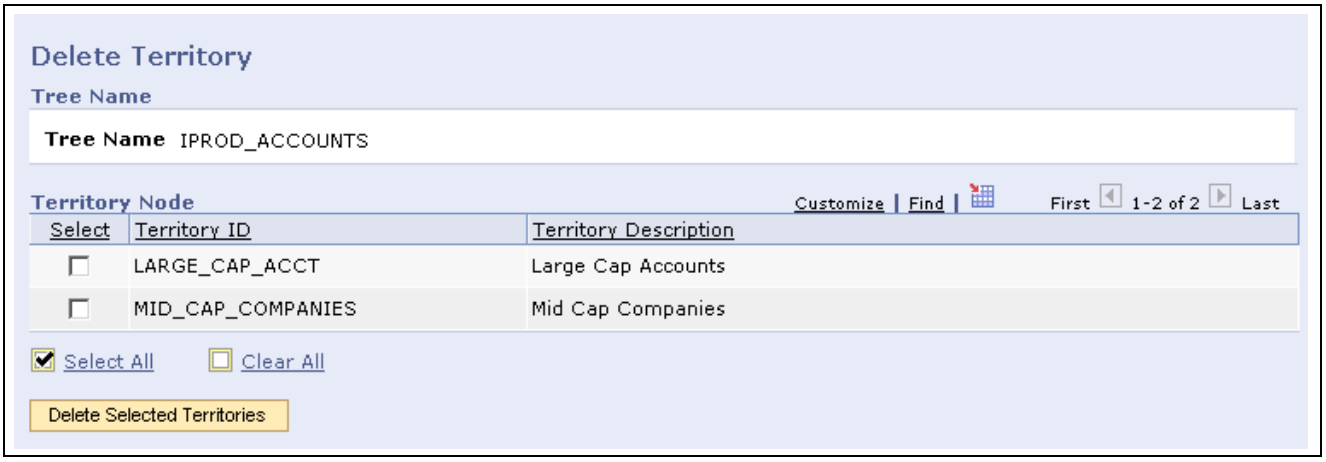
Access the Tree Maintenance and Tree Structure Maintenance pages in Tree Manager.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager*

Using Tree Manager, you can delete nodes from a tree or delete an entire tree. Tree Manager does not, however, delete the territory data associated with trees or nodes across applications. This residual territory data still exists in PeopleSoft Enterprise Sales and can be included in prompt lists as if actively assigned to a tree. For example, you might delete the node for the Western territory, but the Western territory and its data still exist. You must delete this residual territory data from PeopleSoft Enterprise Sales by using the Delete Territory page.

Deleting Residual Territory Definitions From PeopleSoft Enterprise Sales

Access the Delete Territory page.



Delete Territory page

All territories that are deleted from a tree in PeopleSoft PeopleTools are listed on this page. Deleted territories are no longer used for visibility or assignment. Use this page to delete residual territory data from PeopleSoft Enterprise Sales.

Select Select the territory tree or node for which you want to delete residual data.

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Delete Selected Territories When you click this button, the system prompts you to confirm the deletion of residual data for the selected items. If you proceed, the system deletes the selected items and returns you to the Delete Territory page, which lists any territories that still exist for the tree.

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PART 3

Managing Sales Leads and Opportunities

Chapter 10
Understanding Sales Leads and Opportunities

Chapter 11
Creating Sales Leads and Opportunities

Chapter 12
Importing Sales Leads

Chapter 13
Assigning a Lead or Opportunity

Chapter 14
Qualifying a Lead or Opportunity

Chapter 15
Creating a Proposal for a Lead or Opportunity

Chapter 16
Creating Sales Tasks and Adding Notes for a Lead or Opportunity

Chapter 17
Managing Leads and Opportunities

Chapter 18
Sending Sales Email Messages and Correspondence

Chapter 19
Viewing the Opportunity Pipeline

Chapter 20
Including Opportunities in Forecasts and Closing Opportunities

CHAPTER 10

Understanding Sales Leads and Opportunities

This chapter provides an overview of leads and opportunities, and discusses:

- Differences between leads and opportunities.
- Workflow for leads and opportunities.
- History tracking for leads and opportunities.

Understanding Leads and Opportunities

This section discusses:

- Lead and opportunity management.
- Leads.
- Opportunities.
- Prospects.

Lead and Opportunity Management

The key to a successful sales cycle is efficiently managing leads and opportunities toward the closing of a sale. You start by bringing leads into the system, qualifying them, and then converting them to opportunities. Then, you assign potential revenue figures and expected close dates to the opportunities, and you review the opportunities within pipelines and forecasts to estimate individual and company revenue.

Some companies have fast transaction cycles with no distinction between a lead and an opportunity. Other companies have longer sales cycles, and tracking opportunity information becomes critical. Whether a company uses leads only, opportunities only, or both leads and opportunities, sales representatives typically enter and track all of the information. PeopleSoft Enterprise Sales is a management tool that enables you to do that. It provides a flexible, configurable way for sales users to enter and track lead and opportunity data and for sales managers to view that data to manage sales progress and predict close sales ratios, as shown in this diagram:

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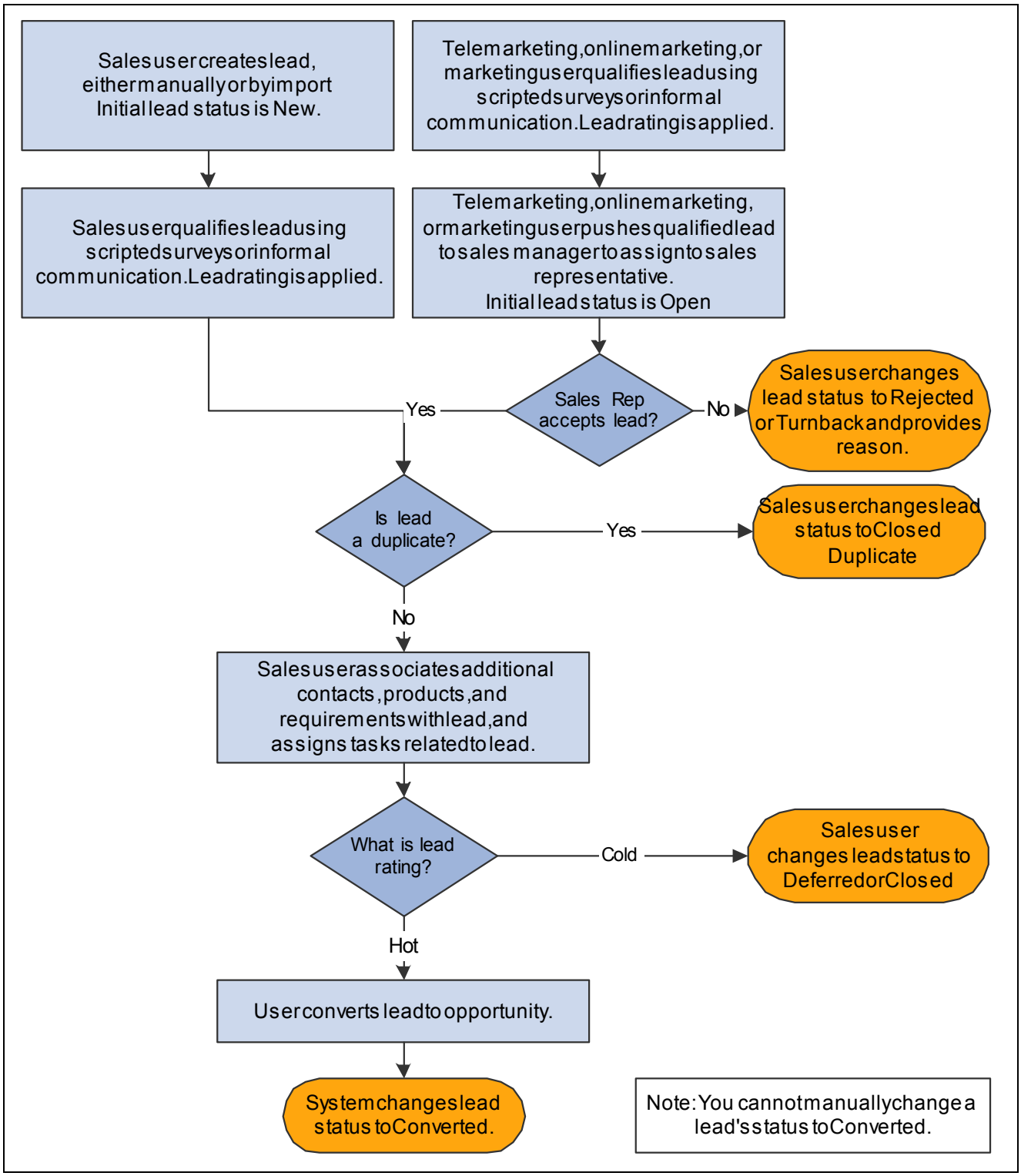

Managing leads to opportunities

Sales users can:

- Search for and organize leads and opportunities by virtually any criteria: sales representative, status, lead rating, and so on.

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- Look up company and contact information, identify competitors, associate partners, and include notes and attachments for each deal.
- Capture the supporting efforts required for handling any lead or opportunity by adding tasks and assigning them to the appropriate team members.
- View their tasks on the My Tasks page or by using the automated calendar.

  Tasks that are added to a lead or opportunity appear automatically in the task list and calendar of the person to whom the task is assigned.
- View task history for any lead or opportunity to quickly identify which tasks are in process, canceled, or completed.
- View a summary of the marketing campaign that generated the lead or opportunity.

  This information is conveyed in sales and not marketing terminology and includes suggestions for appropriate follow-up actions.
- Generate a call report.

Additionally, managers can identify sales teams and assign sales team members.

Several sales leads and opportunity functions can be initiated from within a BPEL business process.

See Appendix B, "Sales Delivered Business Processes and Web Services," page 271.

See Also

Chapter 5, "Setting Up Sales Leads and Opportunities," Understanding the Sales Process, page 31

Leads

A lead represents a potential customer for the sale of the company's products and services. In some sales organizations—especially those that sell products and services over the telephone as part of a call center operation—the lead can be used to track all elements of the sales transaction, from qualification to closure. In other sales organizations, a telemarketing organization might use the lead to track and qualify potential customers that are then handed over to an inside sales or field sales organization as opportunities.

PeopleSoft Enterprise Sales enables you to manage leads and track them from beginning through closures. When a lead is qualified, it can be converted into an opportunity for pursuit by selling organizations. A single person can be a lead sales representative for multiple opportunities. An opportunity can also be associated with multiple leads.

The minimum requirements for creating a lead in PeopleSoft Enterprise Sales include:

- A description of the lead
- A lead status
- The business unit

It is recommended that you also include the customer name and at least one contact name and phone number for follow-up. You can enter as much additional information as needed.

You can enter leads into PeopleSoft Enterprise Sales by:

- Creating a new lead and entering the data directly.
- Copying or cloning an existing lead, changing the necessary data, and saving it as a new lead.

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- Importing data from an external comma-delimited spreadsheet, such as one that you receive from the telemarketing department or that you create from trade show data.
- Integration with PeopleSoft Marketing and Telemarketing

See *PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook*, "PeopleSoft Marketing Applications Preface".

You qualify leads to determine how likely it is that the potential customer will make a purchase. With PeopleSoft Enterprise Sales, you can use a branch script, or survey, to do this. A survey is a set of questions with specified score levels to rate the customer's response. When you finish entering the customer's responses, the system tallies a total of the scores and rates the lead; for example, it might rate a lead as hot, warm, or cold. The marketing or telemarketing department often administers the survey as part of a marketing campaign, or a sales representative might select a survey script to run.

In many organizations, the telemarketing organization is responsible for qualifying leads to a certain point. They can then transfer the lead to the territory management and configurable assignment criteria system to assign it to the sales representative who can accept it, reject it, or turn it back. Sales managers can establish rating rules that automatically assign a rating—for example, hot, warm, or cold—to each lead that is generated from telemarketing.

Opportunities

You can add an opportunity directly to PeopleSoft Enterprise Sales, or you can convert an existing lead to an opportunity.

If the organization does not use leads, you can add opportunities and manage and track them as you do leads, including qualifying and assigning them and developing the sales proposals. You cannot, however, accept, reject, or turn back an opportunity; these actions are relevant to assignment of leads by telemarketing to sales.

If you use leads and a lead meets the organization's requirements, you can convert the lead to an opportunity.

Note. Opportunities are included in pipelines and forecasts, but leads are not.

As with leads, the minimum requirements for creating an opportunity include:

- A description of the opportunity
- An opportunity status
- The business unit

Prospects

Sometimes you might want to enter a potential customer or contact into the system so that you can capture their information, but because adding unnecessary information to the database can affect performance, you do not want to commit their information to your database until they become actual customers or contacts. These potential customers or contacts are called *prospects*, and only the minimal information necessary to identify them is included. Prospects are associated with leads and opportunities (and referrals, in Client Management), but cannot be assigned to partner representatives.

These sales pages display prospect information for leads and opportunities:

- Lead import results.
- Online entry of leads and opportunities.
- Search list for leads and opportunities.

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You can edit prospect information directly on these pages. Customers and contacts from CDM, however, appear as hyperlinks that enable you to access the CDM component for editing.

When a lead is converted to an opportunity or an opportunity is set to Closed/Won, the prospect information is transferred (*pushed*) to the Customer Data Model (CDM), converting the prospect to a contact or customer. A prospect is also pushed to CDM when you use quick create to manually convert prospects from leads and opportunities to customers or contacts.

Prospect information appears on Sales components only (Lead, Opportunity, Referral) and does not appear on these elements:

- My Contacts.
- Tasks.
- Strategic Account Planning/SmartViews.
- Call Reports.
- Audiences.
- Segments.
- 360–Degree View.
- Partner Relationship Management.

Differences Between Leads and Opportunities

A significant difference between leads and opportunities is their relation to pipelines and forecasts. Opportunities but not leads are rolled up into pipelines and forecasts. If you integrate PeopleSoft Enterprise Incentive Management with the system, you can include opportunities (but not leads) in the compensation calculations of Enterprise Incentive Management.

For the most part, the Lead component has the same pages (Summary, Discover, Assign, Qualify, Propose, Tasks, Notes, History, and Call Reports) and the same sections as the Opportunity component. The following exceptions relate specifically to forecasting, which uses products, prices, and revenue allocations:

- On the Opportunity - Propose page, sales users can click the Create Forecast button to copy products to the Forecast section and make them available for inclusion in forecasts.
- On the Revenue Percentage tab on the Opportunity - Assign page, sales users with the appropriate sales access profile can specify revenue allocations and shadow allocations to identify the amounts of revenue that are assigned to individuals.
- Because the system does not roll up leads into forecasts, no Revenue Percentage tab appears on the Lead - Assign page, and no Forecast section exists on the Lead - Propose page.

Here are some additional differences between leads and opportunities:

- You can create opportunities only in PeopleSoft Enterprise Sales.

  However, you can create leads in other PeopleSoft products (for example, Telemarketing, Marketing, and Support).
- You can accept, reject, or turn back a lead but not an opportunity.
- You can track the stage of the sales process on the Opportunity - Discover page but not on the Lead - Discover page.

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Workflow for Leads and Opportunities

You can set up workflow to send notifications when certain events occur in the Lead and Opportunity components. For example, the system can send a workflow notification to a sales manager if a sales representative rejects a lead. PeopleSoft delivers several policies that specify the details for workflow:

Policy Name	Description
Lead is Rejected or Turnback	The system sends notification if a sales user rejects or turns back a lead.
Lead ESA Pricing Info Received	The system sends notification when it receives pricing information from the PeopleSoft Enterprise Service Automation application for a quote created from within a lead.
Lead not accepted in due time	The system sends notification when a lead is not accepted in due time, which is defined for the lead rating.
Opportunity ESA Pricing Info Received	The system sends notification when it receives pricing information from the PeopleSoft Enterprise Service Automation application for a quote created from within an opportunity.

Like other PeopleSoft Customer Relationship Management applications, PeopleSoft Enterprise Sales uses the Active Analytics Framework to configure workflow.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Setting Up PeopleSoft CRM Workflow".

History Tracking for Leads and Opportunities

You can set up history tracking to maintain records of events that occur in the Lead and Opportunity components. For example, the system can log a record if a sales manager changes the sales representative assignment for a lead. PeopleSoft Enterprise Sales delivers several policies that specify the details for history tracking:

Policy Name	Description
Lead Assigned To Changed	The system logs a history record if a sales user changes the sales representative assignment for a lead.
Lead Rating Changed	The system logs a history record if a sales user changes the rating for a lead.
Lead Status Changed	The system logs a history record if a sales user changes the status for a lead.
Opportunity Assigned To Changed	The system logs a history record if a sales user changes the sales representative assignment for an opportunity.

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Policy Name	Description
Opportunity Sales Stage Changed	The system logs a history record if a sales user changes the sales stage for an opportunity.
Opportunity Status Changed	The system logs a history record if a sales user changes the status for an opportunity.

The configuration process for history tracking is similar to that for workflow.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Setting Up PeopleSoft CRM Workflow"

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CHAPTER 11

Creating Sales Leads and Opportunities

This chapter discusses how to:

- Create a sales lead.
- Create a sales opportunity.
- Select the customer for a lead or opportunity.
- Select customer contacts for a lead or opportunity.
- Clone a sales lead or opportunity.
- Convert a lead to an opportunity.

Creating a Sales Lead

This section discusses how to create a sales lead.

Warning! If you use a Sybase database and your user role has data distribution rules with 16 or more subqueries, you may receive an error message when you access a lead or opportunity. If an error occurs, reduce the number of data distribution rules for the user role, or reduce the complexity of the data distribution rules.

You can set up data distribution rules in Enterprise Components.

See *PeopleSoft Enterprise Components for CRM 9 PeopleBook*

Page Used to Create a Sales Lead

Page Name	Object Name	Navigation	Usage
Lead - Discover	RSF_LEAD_ENTRY	Sales, Add Lead	Enter details about a sales lead, including the name, status, and rating, and the customer's name, address, and contact people.

Creating a Sales Lead

Access the Lead - Discover page.

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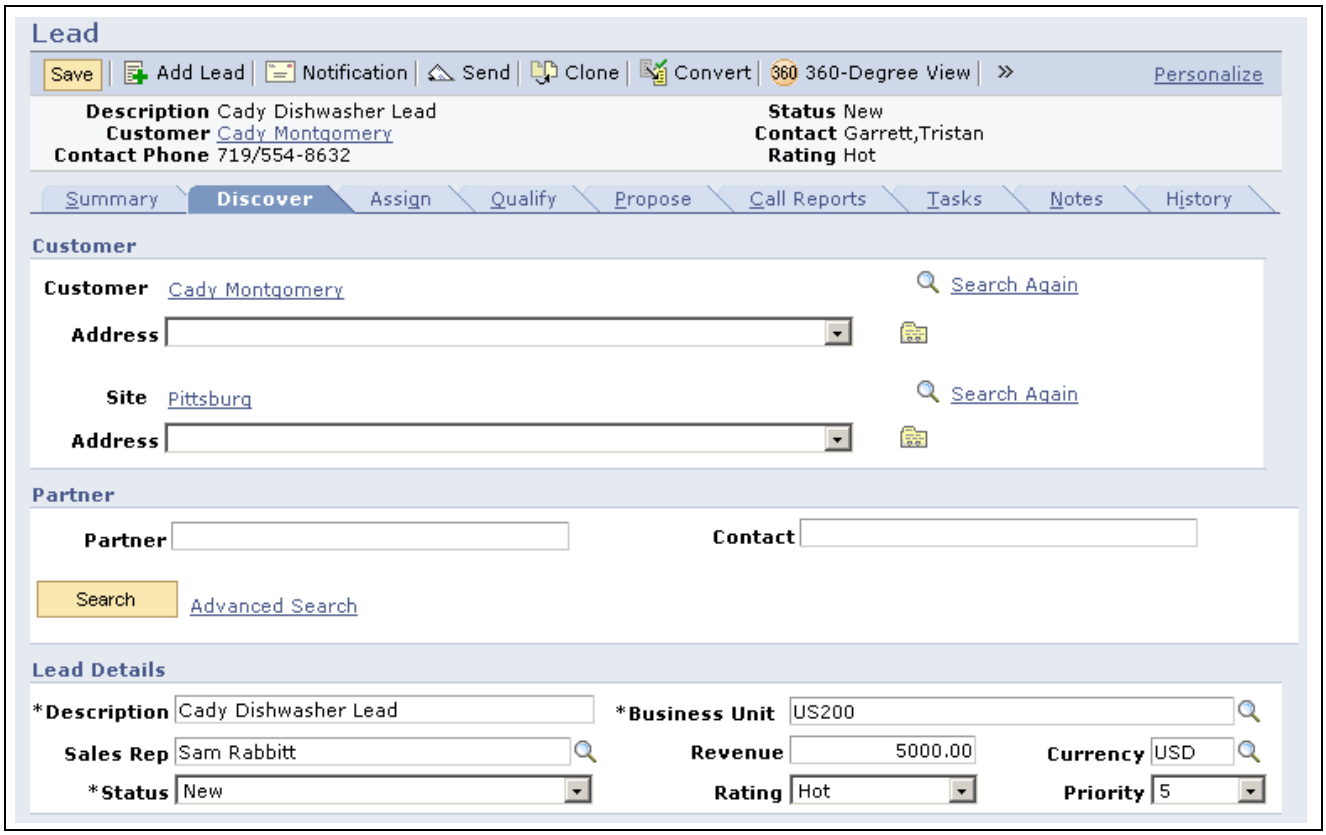
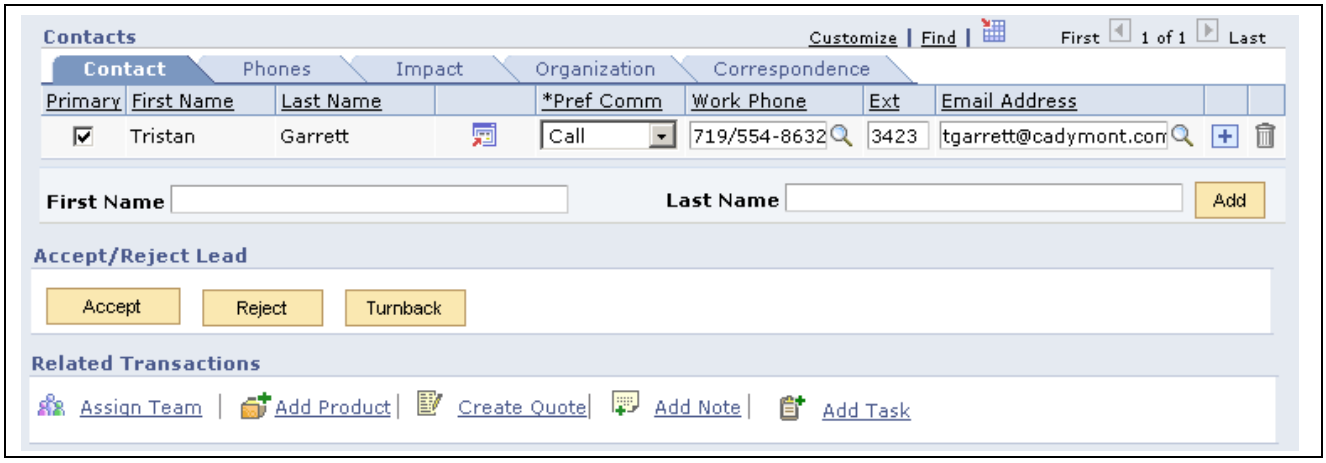


Lead - Discover page (1 of 2)



Lead - Discover page (2 of 2)

Customer

The Type field indicates whether a lead is a company or a consumer. Depending on which you choose, different fields appear. For company customers, you can enter Customer and Site; for consumers, the fields are First Name, Last Name, and Site.

See Chapter 11, "Creating Sales Leads and Opportunities," Selecting the Customer for a Lead or Opportunity, page 132.

When a customer is present on the lead, the Address field is populated with the primary address for the customer. Use the drop-down box to select whether to use an existing address, search for an existing address not in the list, or add a new address. Then, click the Go button to search for an address or add a new address.

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Note that if the customer for a lead is a prospect, the name of the customer is editable on the Lead - Discover page. Otherwise, the customer name is displayed as a hyperlink that you can click to view more information about the customer.

When you manually create a lead, a text entry field and a search button appear next to for the Customer and Site or First Name/Last Name and Site fields. You can enter or search for a customer and site. Before clicking the Search button, you can optionally enter characters in the Customer or First Name and Last Name fields to limit the search.

See Chapter 11, "Creating Sales Leads and Opportunities," Selecting the Customer for a Lead or Opportunity, page 132.

If you display an existing lead, the relevant fields (Customer or First Name and Last Name are displayed when lead is for a prospect customer.) If the lead is for an existing customer, a hyperlink is displayed that can be clicked to launch an existing customer's information on either the Company or Person (Consumer) components. The Search button becomes a Search Again link.

When a customer is present on the lead, the Address field is populated with the primary address for the customer. Use the drop-down box to select whether to use an existing address, search for an existing address not in the list, or add a new address. Then, click the Go button to search for an address or add a new address.

Partner

The Partner section is enabled through the Display Template when Partner Relationship Management is installed. It appears following the Customer section.

Fields in this page region act similarly to those in the Customer region. If you have already selected a customer when you search for a partner, the system limits your search to the partners associated with the customer.

Lead Details

Description — Enter a description of the lead. This can be the customer name, the product, or other descriptive information.

You can define the default value for this field on the Component Field Default component.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Component Field Default Values, page 36.

Business Unit — Enter the business unit with which the lead is associated. The default is the business unit that is associated with the sales user on the Sales User page. If the person who is signed in is not a sales user, then the system uses the business unit that is specified on the person's User Preference page.

Sales Rep (sales representative) — Enter the primary sales representative (in the format *last name, first name*) who is assigned for this lead. The default is the name of the sales user who is currently signed in. If your sales access profile permits you to reassign leads, you can override the default value.

You can enter the desired sales person's name by entering a few letters of the sales user's last name and clicking the Lookup button to search for that person, or you can click Lookup without entering any letters to select from the list of all sales users that are within the specified business unit.

Revenue and **Currency** — Enter the estimated amount of revenue that you anticipate from this lead and the currency code for the revenue. When you add products to the lead on the Propose page, this currency is used for pricing information and to calculate

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a total price. You cannot change the currency code if products are already associated with the lead.

The default currency code is the code that is associated with the sales user on the Sales User page.

Status

Select the current status of the lead.

Note. Status values are delivered as translate values; do not modify or delete them. However, if you have the required security permissions, you can create additional status values.

Delivered values are:

- *Accepted:* The lead is accepted by the assignee.
- *Closed - Duplicate:* The lead is a duplicate of an existing, active lead. (Fields remain display-only.)
- *Closed - Lost:* The lead should not be worked or updated because the sale was lost. (Fields remain display-only.)
- *Closed - Won:* The lead should not be worked or updated because the sale was won. (Fields remain display-only.)
- *Converted to Opportunity:* The lead is converted to an opportunity and is available for pipelines and forecasts.

  Use the Convert button in the toolbar to convert a lead to an opportunity. When a lead is converted, the fields on the Lead pages remain display-only. You must access the opportunity to enter or update data.
- *Deferred:* The assignee cannot accept the lead at this time. For example, a sales representative might select this value when attempts to contact the customer are unsuccessful and the representative wants to handle other leads and then return to this one later.
- *Imported:* The lead is imported from an external spreadsheet.
- *New:* The lead is recently created.

  Note. The system assigns this value when you add a new lead. Then, when you enter data and save the page, the system changes the status to *Open.*

- *Open:* The lead is available but is not yet accepted, rejected, or turned back.
- *Referred:* The assignee refers the lead to another specified sales representative.
- *Rejected:* The assignee does not accept the lead and enters a rejection reason. When you select this value, the Reason and Comments fields appear; you must enter a reason.
- *Turnback:* The assignee resubmitted the lead for assignment to another sales representative. When you select this value, the Reason and Comments fields appear, and the Sales Rep (sales representative) field is cleared; you must enter a reason.
- *Working:* The assignee accepted the lead and is currently working on it.

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Note. If the lead came from PeopleSoft Telemarketing, the status of *New* or *Open* must be changed to *Accepted* or *Rejected* before you can change it to any other status.

Rating Indicates the degree of the customer's interest or the potential for making a sale; for example, *Hot, Warm,* or *Cold.*

Define rating values on the Lead Ratings page. Also, you can map scripted survey ratings to lead ratings to qualify a lead and move it from PeopleSoft Marketing or Telemarketing to Sales. If a lead is not accepted or rejected within the specified time for its rating, PeopleSoft Enterprise Sales workflow can be triggered to send an email notification to the assigned sales representative and to the representative's manager. Workflow can also send an email notification to the telemarketing agent who transferred the lead and to that agent's manager.

Note. If the lead source is PeopleSoft Telemarketing or PeopleSoft Marketing, this value in this field is automatically generated. You can override this value.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Lead Ratings, page 38.

Priority Select a priority to indicate the urgency of working this lead. Priority values are translate values.

Contacts

This page region enables you to view and enter information about the contacts for the lead.

If the Allow Prospects option is enabled, you can use the + button to enter new prospects, or run a search to find already-entered contacts.

See Chapter 11, "Creating Sales Leads and Opportunities," Selecting Customer Contacts for a Lead or Opportunity, page 138 and *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up General Options," Understanding PeopleSoft Enterprise CRM General Options.

Accept/Reject Lead

Click a button to accept, reject, or turn back the lead. If you click the Reject or Turnback buttons, the Reason (required) and Comments (optional) fields appear on the page.

See Also

Chapter 15, "Creating a Proposal for a Lead or Opportunity," page 179

Creating a Sales Opportunity

This section discusses how to create a sales opportunity.

Warning! If you use a Sybase database and the user role has data distribution rules with 16 or more subqueries, you may receive an error message when you access a lead or opportunity. If an error occurs, reduce the number of data distribution rules for the user role, or reduce the complexity of the data distribution rules.

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You can set up data distribution rules in Enterprise Components.

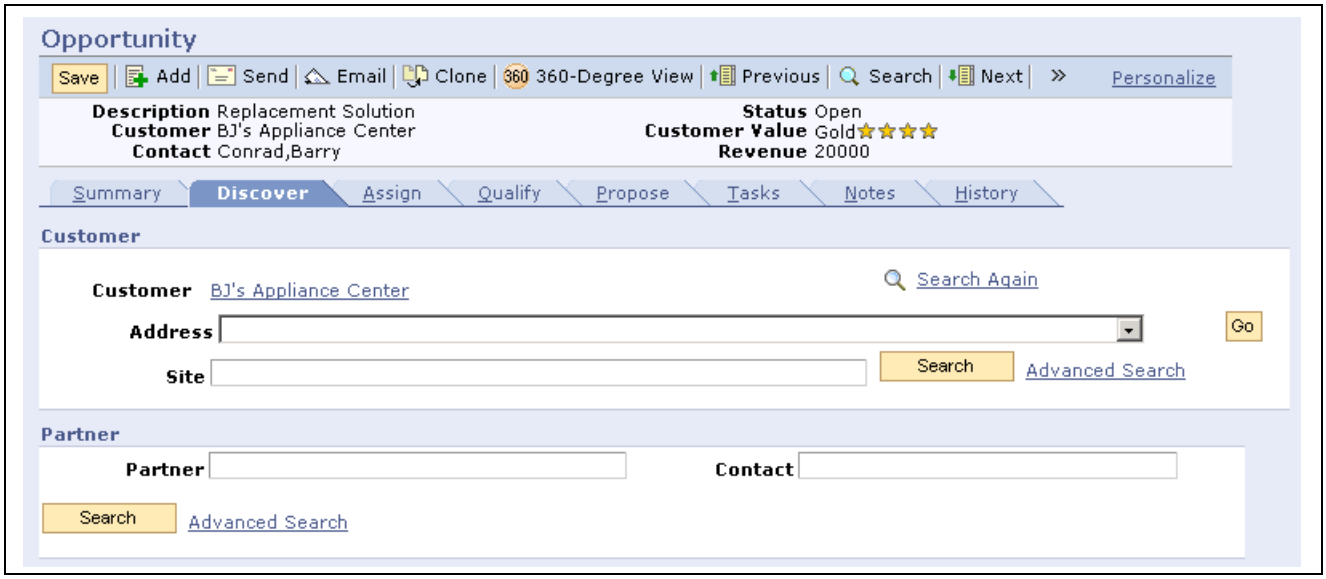
See *PeopleSoft Enterprise Components for CRM 9 PeopleBook*

Page Used to Create a Sales Opportunity

Page Name	Object Name	Navigation	Usage
Opportunity - Discover	RSF_OPP_DETAIL	Sales, Add Opportunity	Identify details about a sales opportunity, including the name, status, and rating, and the customer's name, address, and contact people.

Creating a Sales Opportunity

Access the Opportunity - Discover page.



Opportunity - Discover page (page 1 of 2)

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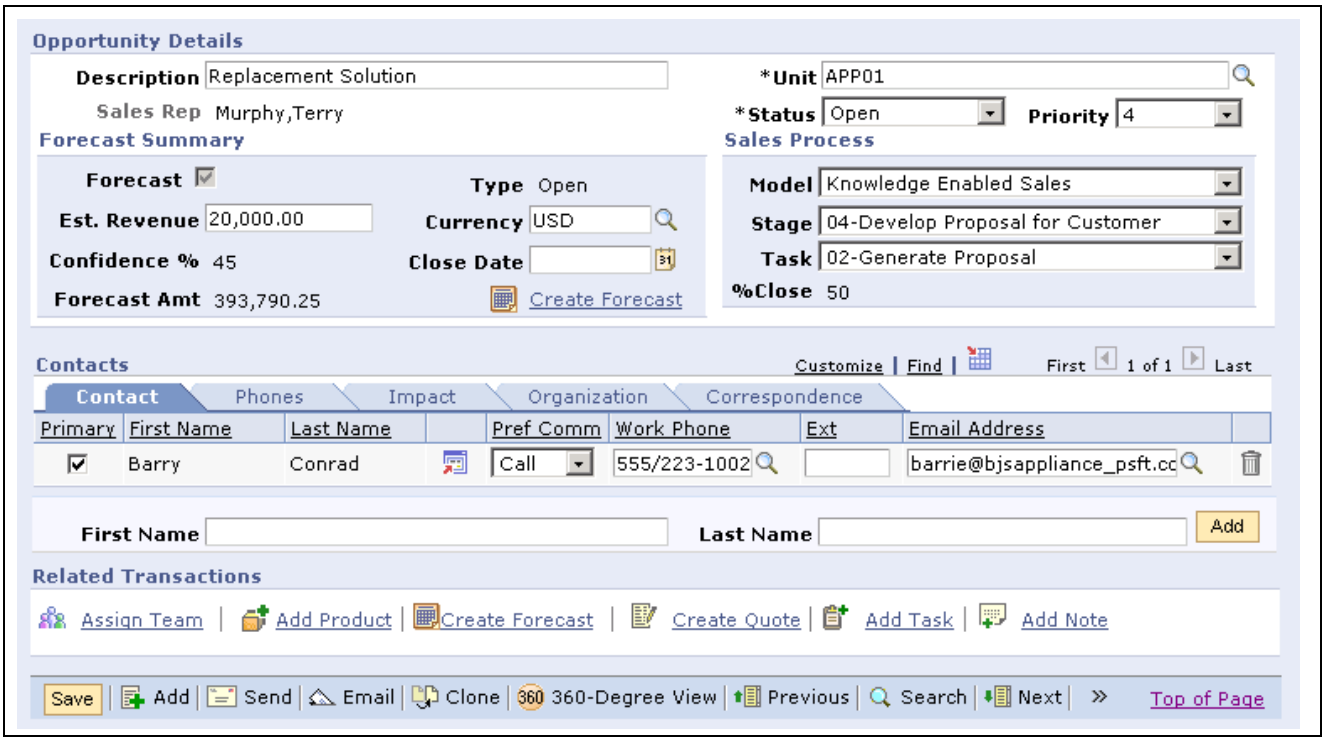

Opportunity - Discover page (page 2 of 2)

This page is similar in appearance and usage to the Lead - Discover page with the following exceptions:

- The Opportunity Details page region includes a Forecast Summary.
- You cannot accept, reject, or turn back an opportunity.

Note that, as with a lead, if the customer for an opportunity is a prospect, the name of the customer is editable on the Opportunity - Discover page. Otherwise, the customer name is displayed as a hyperlink that you can click to view more information about the customer.

Forecast Summary

Model

Select the overall sales process to use for this opportunity; for example, the proprietary Knowledge-Enabled Sales (KES) process.

Set up sales processes on the Sales Process page.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up a Sales Process, page 31.

Stage

Select the current stage of the sales process for this opportunity. The system populates this drop-down list box with values that are based on the specified sales process.

Set up sales stages on the Sales Process page.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up a Sales Process, page 31.

Task

Select the current task to perform for this opportunity. The system populates the drop-down list box with values that are based on the specified sales process and sales stage.

Set up sales tasks on the Sales Process page.

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See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up a Sales Process, page 31.

%Close (percentage close) The system calculates this value after you enter the sales task and save the opportunity. The calculation is based on the %Close method that is associated with the specified sales process.

See Chapter 20, "Including Opportunities in Forecasts and Closing Opportunities," Using the Forecast Summary, page 224.

Selecting the Customer for a Lead or Opportunity

This section discusses how to:

- Select a customer for a lead or opportunity.
- Search for customer information.
- Use the Quick Create feature to create a customer.
- Select the customer address.
- Select the customer site address.

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Pages Used to Select the Customer for a Lead or Opportunity

Page Name	Object Name	Navigation	Usage
Lead - Discover	RSF_LEAD_ENTRY	• Sales, Add Lead • Sales, Search Leads	Select the customer for a sales lead.
Opportunity - Discover	RSF_OPP_DETAIL	• Sales, Add Opportunity • Sales, Search Opportunities	Select the customer for a sales opportunity.
Search for Customer, Search for Partner	RBQ_BOSRCH	On the Lead - Discover or Opportunity - Discover page, click the Search button.	Search for a customer or a partner.
Create Company	RBQ_QCREATE	On the Search for Customer page, select the Company tab and click the Add a New Company link.	Create a new company and save it in the database.
Create Consumer	RBQ_QCREATE	On the Search for Customer page, select the Consumer tab and click the Add a New Consumer link.	Create a new consumer and save it in the database.
Customer Address	RSF_LE_ADDR_SEC	On the Lead - Discover page, select —> *add address* in the first Address field and click Go.	Enter the customer's address for a lead.
Customer Address	RSF_OPP_ADDR_SEC	Sales, Add Opportunity On the Opportunity - Discover page, select —> *add address* in the Address field and click Go.	Enter or review the customer's address for an opportunity.
Site Address	RSF_LE_SITE_SEC	From the Lead - Discover page, select *Add* in the second Address field. Click Go.	Enter or review the customer site address for a lead.

Selecting a Customer for a Lead or Opportunity

Access the Leads - Discover page or the Opportunity - Discover page.

Note. The Customer section appears on the Discover page in the Lead component and in the Opportunity component. Although the following example shows the Lead component, the information here applies to both leads and opportunities.

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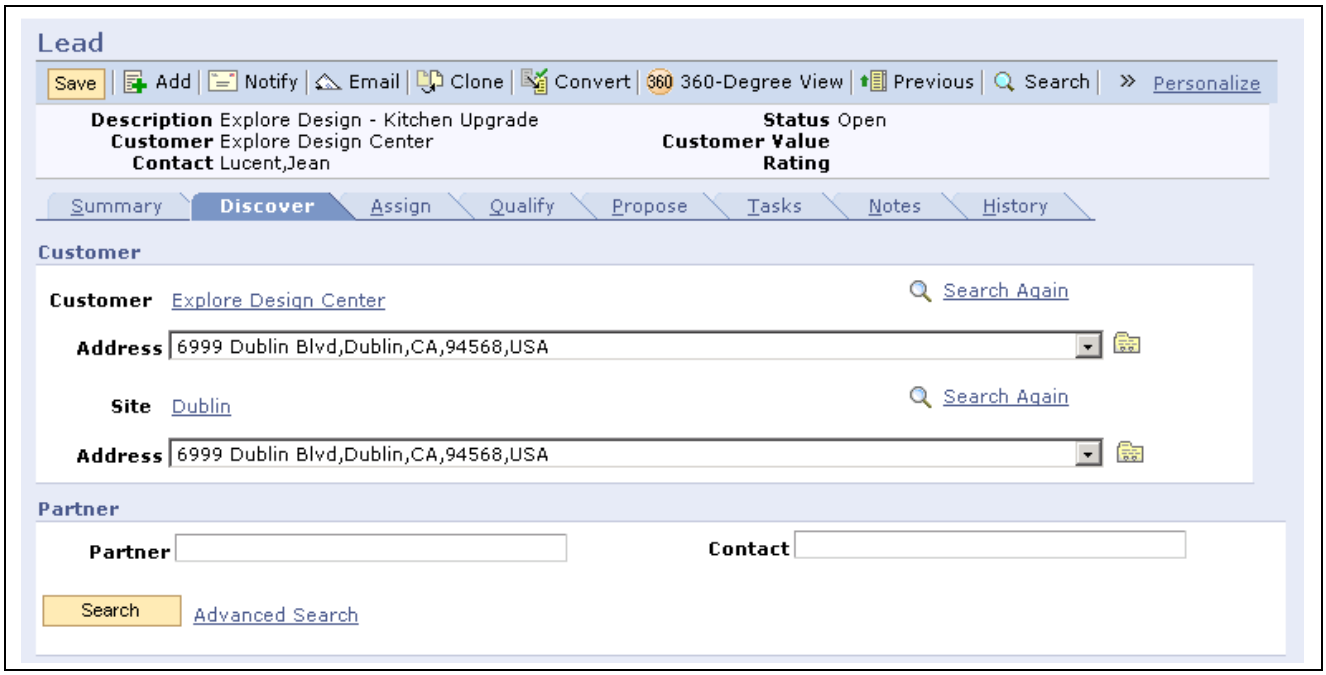

Lead - Discover page

Search Before clicking a Search button, you must enter a business unit. Also, you have the option to enter characters in the Customer or Site field. Click the Search button to search for customer or site data and to determine if a customer or site already exists. If it does not exist, you can quickly create a customer or site.

If you select a site before a customer, then the system automatically populates the Customer field. If you select a customer before a site, then you can only search for sites of that customer. If you have already selected a partner when you search for a customer, the system limits your search to the customers associated with the partner.

Advanced Search Click the Advanced Search link to search for customer or site data. You can enter specific criteria to use in the search.

Address After you select a customer, the system populates the Address field with the primary address for the customer. Use the drop-down box to select whether to use an existing address, search for an existing address not in the list, or add a new address. Then, click the Go button to search for an address or add a new address.

Note. If you already selected a customer or a site, the system displays a Search Again link instead of the Search box and Advanced Search link.

Searching for Customer Information

Access the Search For Customer page.

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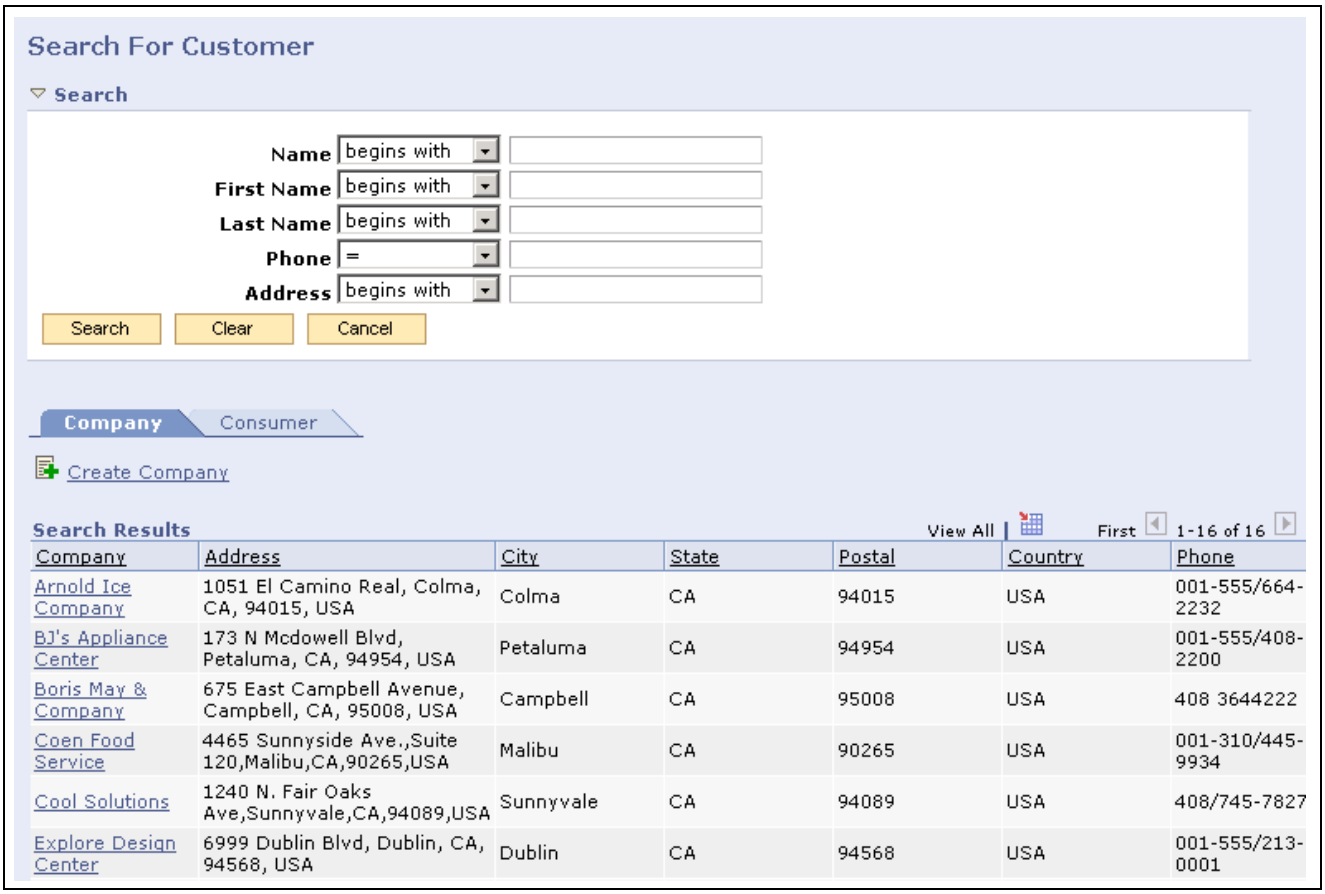

Search for Customer page

To select a customer, click on a company or consumer in the Search Results section. To add a new company or consumer, click the Create a New Company link or Create a New Consumer link.

Using the Quick Create Feature to Create a Customer

Access the Create Company page or the Create Consumer page.

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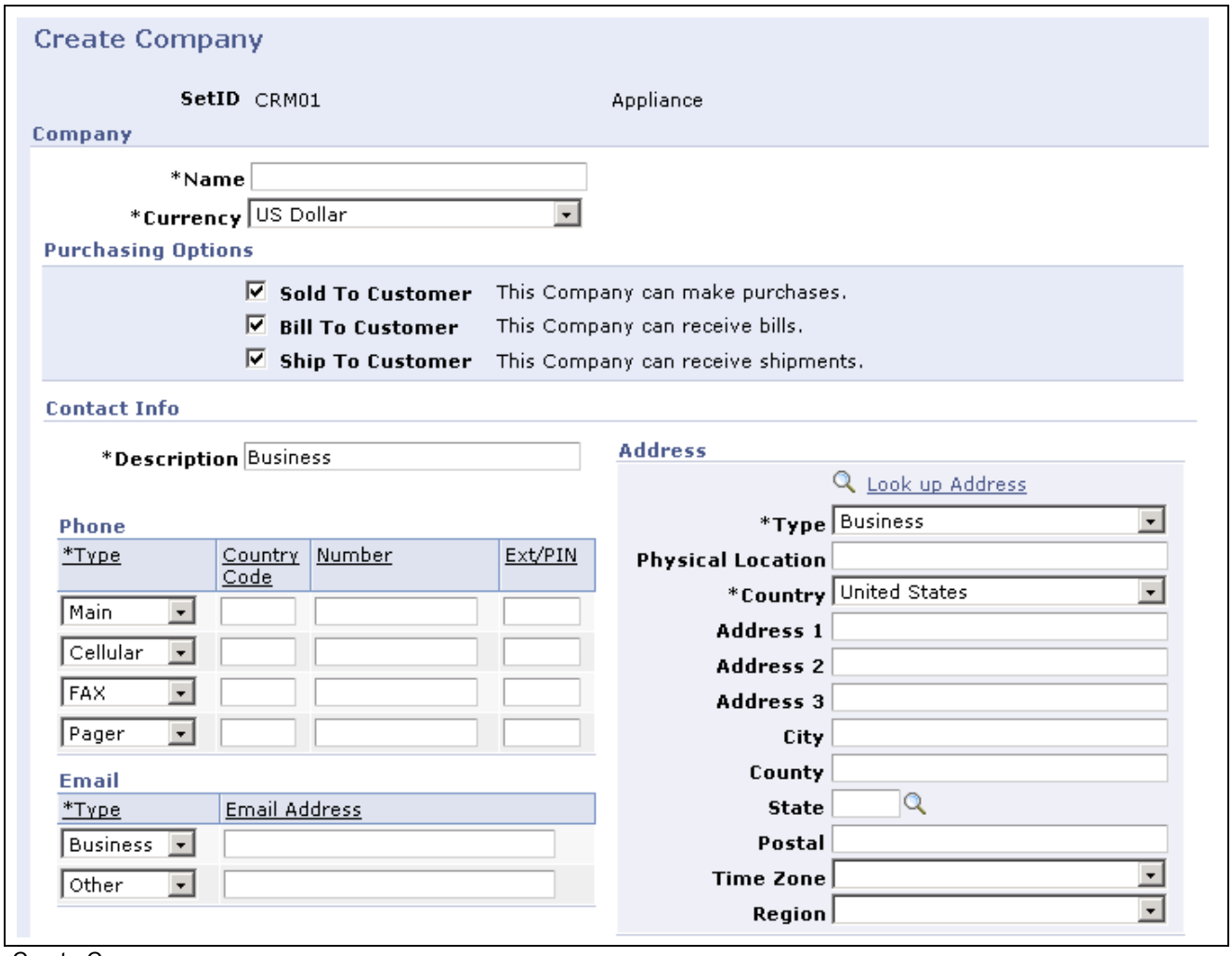

Create Company page

When you use the Quick Create feature, you enter the customer information directly into the database, and the customer entry immediately becomes available for searching.

Note. When you use Quick Create to create a new company or consumer all applicable information from the lead or opportunity will be passed to it.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Using Business Object Search and Quick Create Functionality," Creating Business Objects by Using the Quick Create Component

Selecting the Customer Address

Access the Lead - Discover page or the Opportunity - Discover page.

Note. Although the following example shows a customer address, the information applies to both the Customer Address page and the Site Address page.

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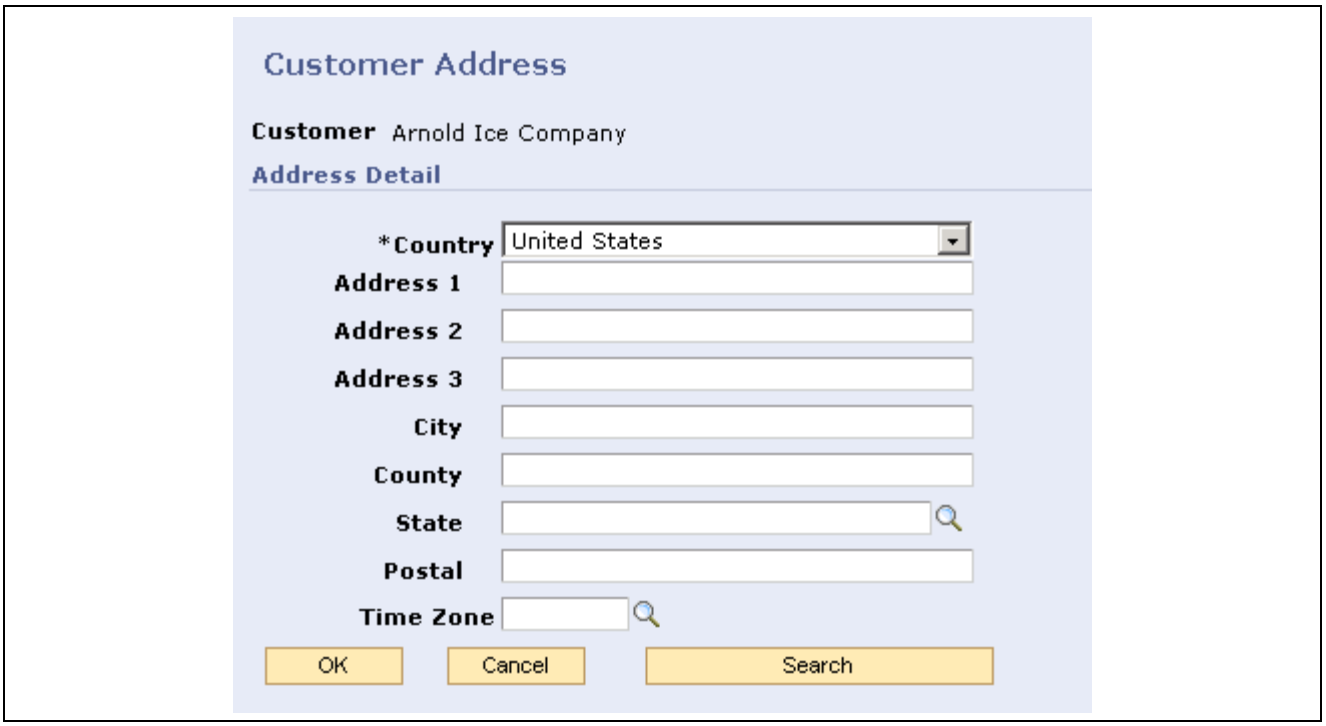

Customer Address page

Note. In PeopleSoft Enterprise Sales, you can save only one customer address and one customer site address for each customer for the lead or opportunity. However, you can create multiple addresses for the same customer in the database. To add or update addresses in the database, use the Quick Create pages or customer information pages under the CRM Customer menu.

OK Click to save data on this page and make it available for viewing or updating later. The system displays the beginning of the address in the Address drop-down box for the Customer or Site field on the Lead - Discover page or Opportunity - Discover page.

Search Click to search for an address to determine if it already exists.

Note. If an address already exists and you enter it again, the system creates a duplicate entry in the database. To avoid duplicates, always search first to determine if the address exists before adding it.

If the address already exists, select it from the list. The system displays the Customer Address page and with the address and its associated purchasing options designations *(Sold To Address, Billing Address,* and *Shipping Address).*

The Enter New Address button becomes available.

Selecting the Customer Site Address

Access the Site Address page.

Note. Fields on the Site Address page function in the same way as the fields on the Customer Address page.

See Chapter 11, "Creating Sales Leads and Opportunities," Selecting the Customer Address, page 136.

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Selecting Customer Contacts for a Lead or Opportunity

This section discusses how to:

- Search for customer contacts.
- Use the Quick Create feature to create a contact.
- Update customer contact information.

Pages Used to Select Customer Contacts for a Lead or Opportunity

Page Name	Object Name	Navigation	Usage
Lead - Discover	RSF_LEAD_ENTRY	• Sales, Add Lead • Sales, Search Leads	Enter or view data for a lead.
Opportunity - Discover	RSF_OPP_DETAIL	• Sales, Add Opportunity • Sales, Search Opportunities	Enter or view data for an opportunity.
Search for Contact	RBQ_BOSRCH	On the Lead - Discover page or the Opportunity - Discover page, click the Add button.	Search for a contact. You can optionally enter a first and last name on the component's Discover page to narrow the search.
Create Contact	RBQ_QCREATE	On the Search for Contact page, click the Create Contact link.	Create a new contact and save it in the database.

Searching for Customer Contacts

Access the Search For Contact page.

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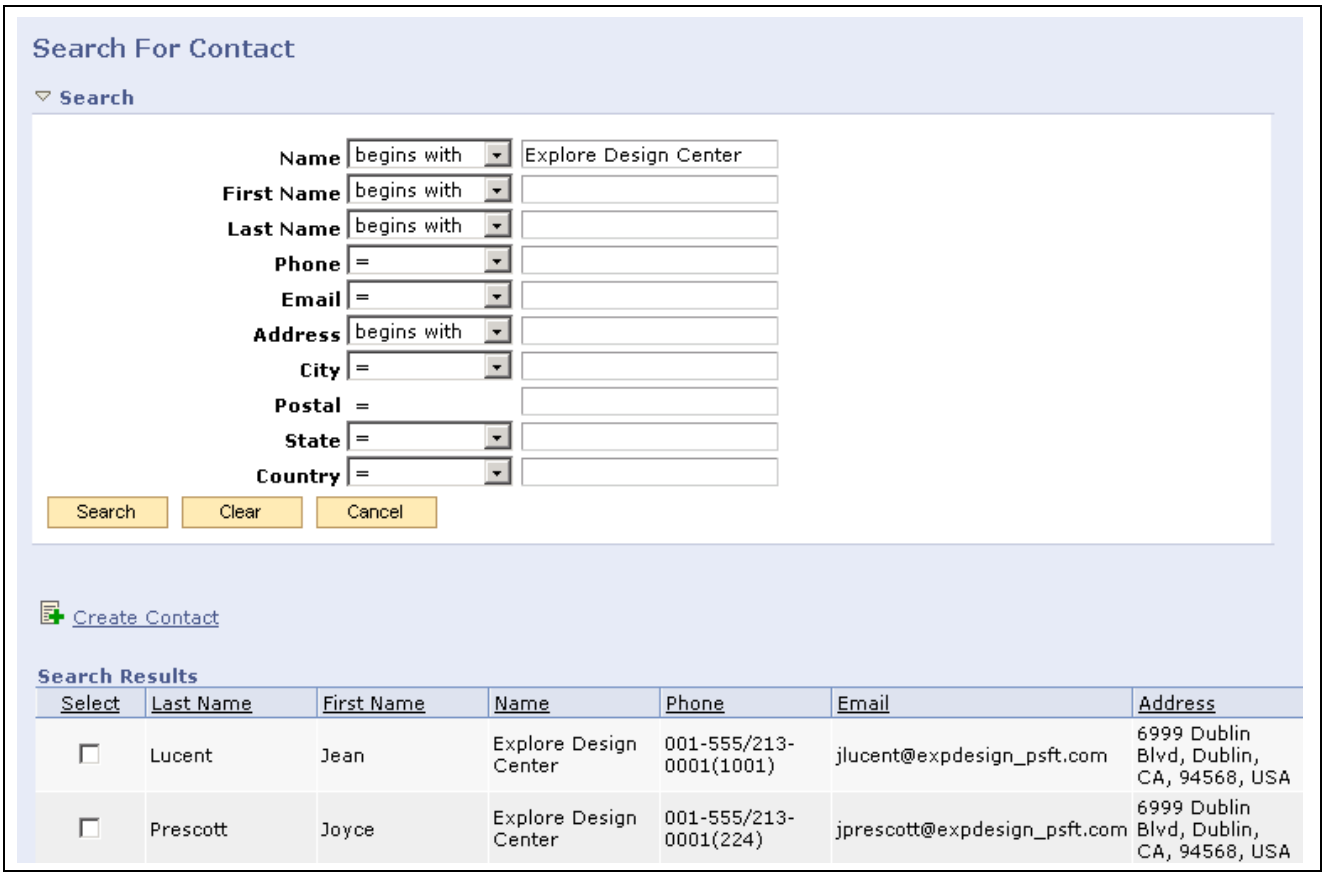

Search for Contact page

If you select a customer before searching for a contact, the system adds the name of the customer to the Name field. This limits the search to contacts of the specific customer. The system carries over the text that you enter on the Lead - Discover page or Opportunity - Discover page for the contact name to search. You can override the text here. You can also enter search criteria for a phone number, email address, or person ID. If you select a contact that is not associated with the customer specified on the lead or opportunity, the system adds the relationship of the contact to the customer when you save.

Search — Click Search to launch the search and display results in the grid at the bottom of the page.

Select (check box) — Select the contacts to associate with the customer. If the system finds an exact match for the search criteria, it hides the Select check box and changes the Last Name and First Name field value into a link. Select the link to select the user and return to the Discover page.

Select (button) — Click this button to associate the selected contacts with the customer and to return to the Discover page, where the system displays data for the contacts that you select.

Create a New Contact — Click to access the Create Contact page to create a new contact if, after searching, you determine that a contact does not exist.

Using Quick Create to Create a Contact

Access the Create Contact page.

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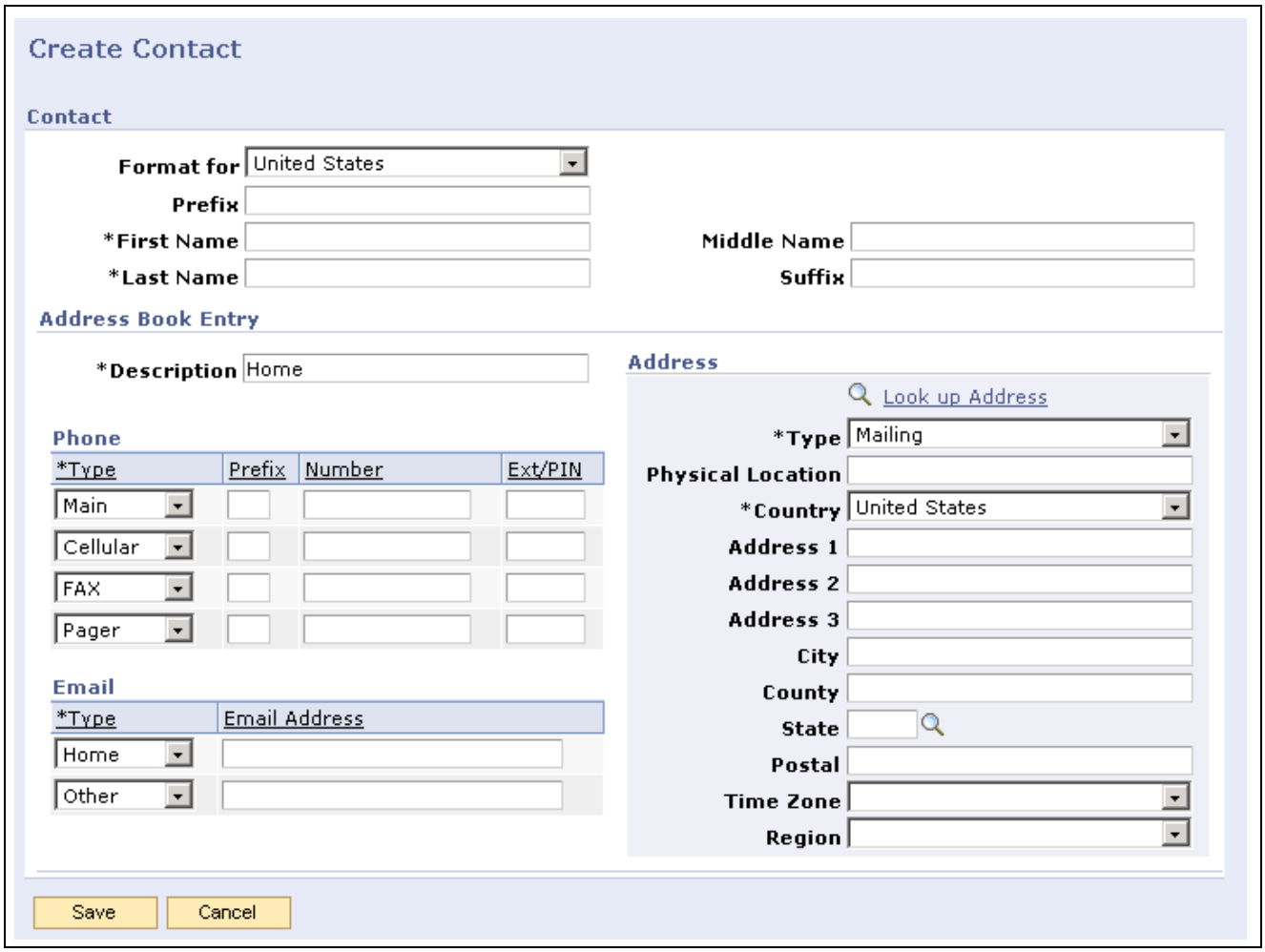

Create Contact page

When you use the Quick Create feature, you enter the customer contact directly into the database, and that contact becomes available immediately for searching.

Note. When you use Quick Create to create a new contact, only the first name and last name are passed to quick create. When the user returns from quick create, the information in the contact row is refreshed from the information that was entered on the quick create page. For example, if a user enters a work phone and email address in the contact grid, and then transfers to quick create and provides a different work phone, the work phone in the contact grid will be refreshed from the one that was provided in quick create. The email address still exists in the contact row and is saved to CDM when the user saves the lead.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Using Business Object Search and Quick Create Functionality," Creating Business Objects by Using the Quick Create Component

Updating Customer Contact Information

Access the Lead - Discover page or the Opportunity - Discover page.

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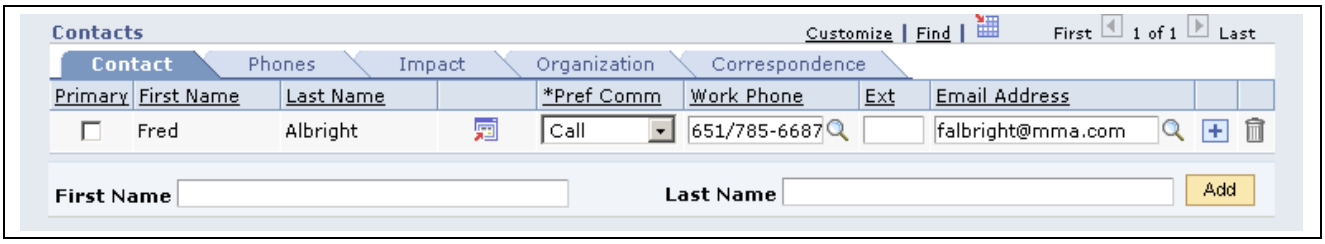


Lead - Discover page: Contact tab

Note. If you edit contact information in PeopleSoft Enterprise Sales, the system updates the contact information in the Customer Data Model tables.

Note. The Contacts section appears on the Discover page in the Lead and Opportunity components. Although the example shows lead details, the information here applies to both leads and opportunities.

Contact

Primary — Select to indicate the primary contact for this lead. You can create only one primary contact.

Pref Comm (preferred communication) — Select the contact person's preferred method of communication.

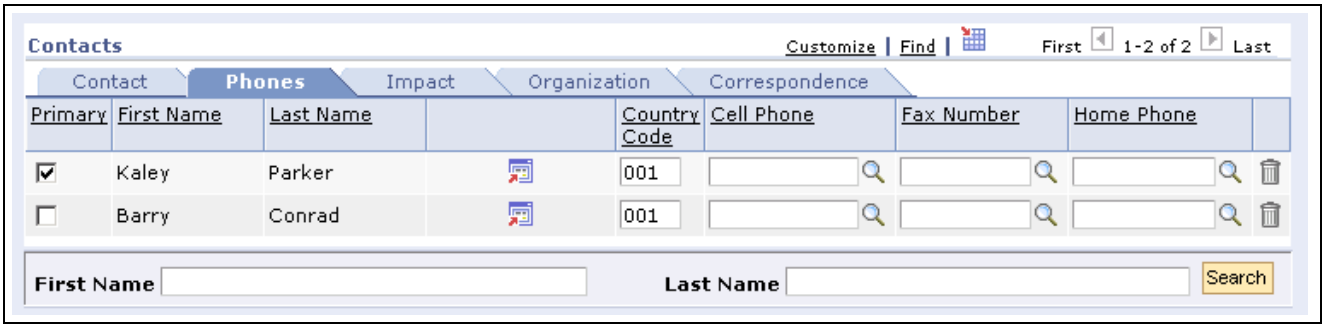
Communication methods are delivered as translate values that you can modify if you have the necessary permissions.

Work Phone and **Ext** (extension) — Enter the contact's work phone number here. (Enter additional phone numbers on the Phones tab.)

Email Address — Enter the contact's email address. This address is required if you plan to email the proposal.

Phones

Access the Phones tab.



Lead - Discover page: Phones tab

Enter all phone numbers except the contact's work phone number. Enter the contact's work phone number on the Contact tab.

Impact

Access the Impact tab.

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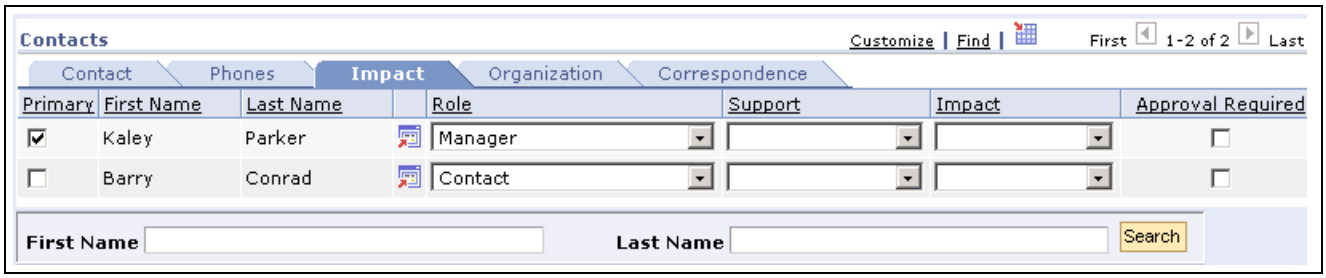


Lead - Discover page: Impact tab

Enter information to identify the contact's impact on the customer's decision to make the purchase.

Note. You identify the contact's decision-making role on the Contact tab, and the contact's business title on the Organization tab.

Role Select a role that best identifies the role of the contact.

Note. Do not confuse roles with business titles, which you enter on the Organization tab.

Support Select the type of support that the contact shows for this purchase.

Define support values on the Supports page.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Contact Support Levels, page 45.

Impact Select the impact that this contact has on the customer's decision to make the purchase.

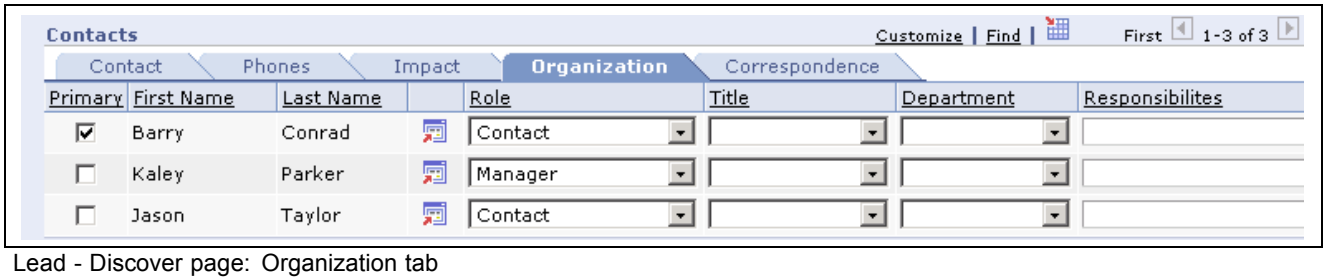
Define impact values on the Impacts page.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Contact Impact Levels, page 46.

Approval Required Select to indicate that the contact must grant approval on behalf of the customer for the sale to go through. For example, if the individual is influential in the company but does not have final approval, clear this check box.

Organization

Select the Organization tab.



Lead - Discover page: Organization tab

Enter the contact's business title, department, and responsibilities. Set up contact titles and departments on the Titles page and the Departments page.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Contact Titles, page 46.

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Cloning a Sales Lead or Opportunity

This section discusses how to clone an existing sales lead or opportunity.

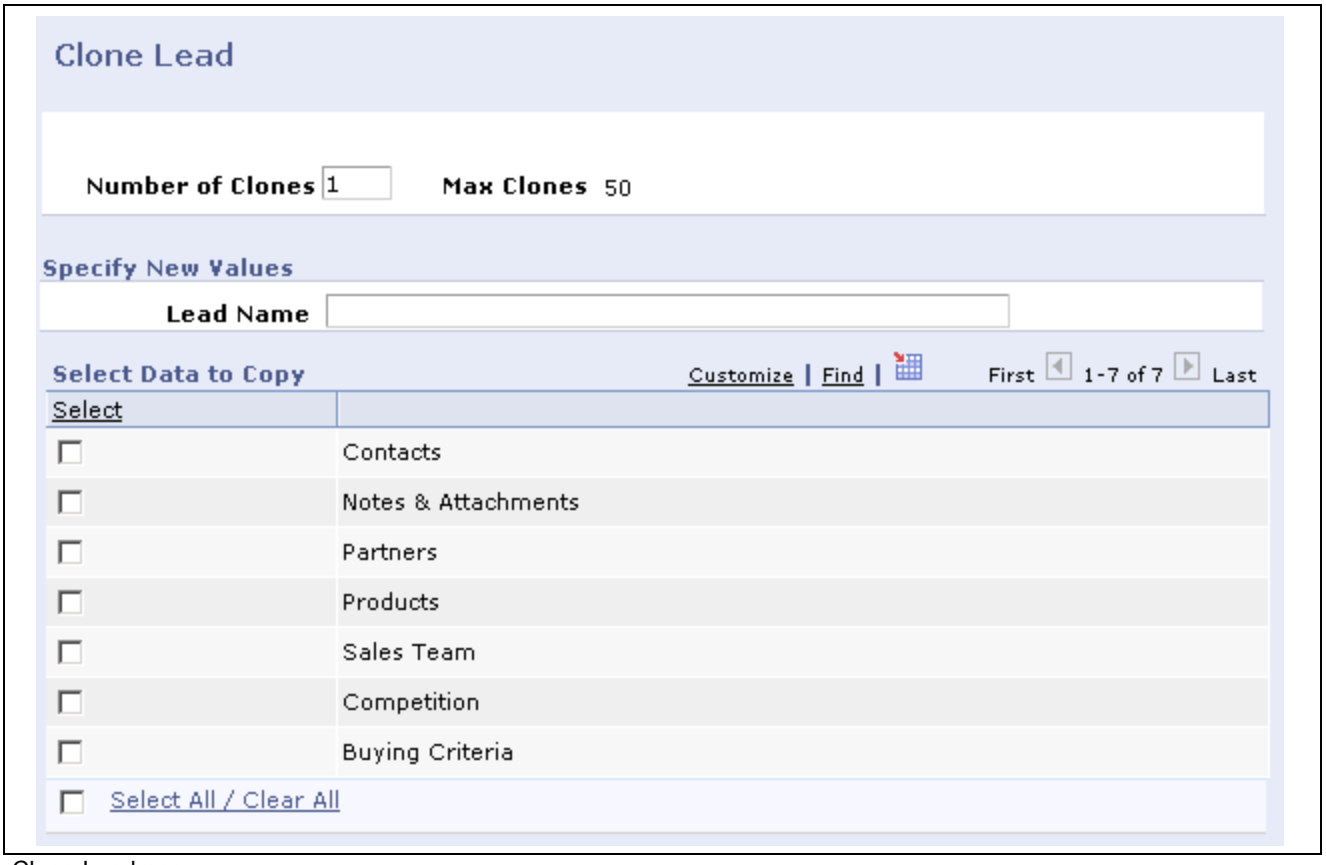
Page Used to Clone a Sales Lead or Opportunity

Page Name	Object Name	Navigation	Usage
Clone Lead	RB_CLONE_TXN_SEC	Sales, Search Leads Select a lead and click the Clone link on the toolbar.	Clone a lead.
Clone Opportunity	RB_CLONE_TXN_SEC	Sales, Search Opportunities Select an opportunity and click the Clone link on the toolbar.	Clone an opportunity.

Cloning an Existing Lead or Opportunity

Access the Clone Lead page or the Clone Opportunity page.

Note. Although the following example shows the Clone Lead page, the information also applies to the Clone Opportunity page.



Clone Lead page

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Number of Clones	Enter the number of copies that you want to make from the original lead or opportunity. The system creates the clones and appends the number of copies to the lead description.
Lead Name	Enter a name or description for the new lead or opportunity.
Select	Select the data to copy from the original to the clone.

Converting a Lead to an Opportunity

This section discusses how to convert a lead to an opportunity.

Page Used to Convert a Lead to an Opportunity

Page Name	Object Name	Navigation	Usage
Convert Lead to Opportunity	RSF_LE_OPP_SEC	Click the Convert link on any page in the Lead component.	Convert a lead to an opportunity.

Converting a Lead to an Opportunity

Access the Convert Lead to Opportunity page.

Convert Lead to Opportunity page

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Converting Prospects to Customers

When converting a lead to an opportunity, if the lead is a prospect, a new CDM customer is created using the prospect's information (the prospect is "pushed" to CDM). The lead and the opportunity are linked to the customer, and a hyperlink that allows navigation to the newly-created CDM customer appears. When converting a prospect lead to an opportunity, the customer name (for a company) or the first and last name (for a contact) must be present to push the prospect's information to CDM. If these are not present, the lead is converted to an opportunity but the information is not transferred to CDM.

Note. When converting a lead to an opportunity, if the lead is a prospect, a new CDM customer is created using the prospect's information (in other words, the prospect is "pushed" to CDM). The lead and the opportunity are linked to the customer, and a hyperlink is displayed to allow navigation to the newly-created CDM customer. Note also that when converting a prospect lead to an opportunity, the customer name (for a company) or the first and last name (for a contact) must be present in order to push the prospect's information to CDM. If these are not present, the lead is converted to an opportunity but the information is not transferred to CDM.

STEP 1: Link to Existing or Create a new Opportunity

Create New Opportunity Select to convert the lead into a new opportunity.

Link an Existing Opportunity Select to convert the lead by merging it into an existing opportunity.

Select Existing Opportunity If you select the Link to an Existing Opportunity check box, select one of the opportunities in this grid. The grid displays a list of opportunities that have the same customer and business unit as the lead that is converted. You can only select opportunities to which you have security access; the Select check box is not available for other opportunities.

Note. This region appears only if there are opportunities.

STEP 2: Select Data to Copy

(Check boxes) Select the data to copy from the lead to the opportunity.

If you associate the lead with an existing opportunity, the system adds the selected information from the lead to the selected opportunity.

STEP 3: Complete Conversion

Transfer to New Opportunity Select to transfer to the opportunity when you click OK.

If this check box is cleared, the system returns to the Leads page on which you clicked the OK button.

OK Click to have the system save the opportunity to the opportunities list and the Opportunities details component. The opportunity is available for you to continue updating and managing it.

To immediately access the new opportunity upon successful conversion, select the Transfer to Opportunity check box before clicking OK.

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CHAPTER 12

Importing Sales Leads

This chapter discusses how to import sales lead data.

Importing Sales Lead Data

You can import lead data into your system from an external comma-separated values (CSV) file. However, before you can import the data, you must create a database template to receive the data. You must also create an import map to identify the items from the spreadsheet that populate the various fields in the database template. A default template and map exist in the delivered database. You can use these as a model for creating other templates or maps.

This section provides an overview of the data import process and discusses how to:

- Import lead data from an external file.
- View a template definition.
- View lead-import results.
- View lead-import errors.
- Search for imported data.

See Also

Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Templates for Importing Leads, page 58

Understanding the Data Import Process

You can upload a CSV spreadsheet (such as a Microsoft Excel spreadsheet), map the columns on the spreadsheet to fields in your database, and run an automated process to import the data from the spreadsheet into PeopleSoft Enterprise Sales. You can import data from any comma-delimited spreadsheet, including telemarketing spreadsheets, spreadsheets from trade shows, or your own personal spreadsheets. When you import leads, the system stores the data in the Leads table and the Customer Data Model tables.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*

PeopleSoft Enterprise Sales is shipped with a predefined lead-import template and map for importing lead data. When you upload a spreadsheet and select the import template and import map, the system displays a list of the column headings and the closest matching database field name. The system also provides other field names from which to choose for each column. If the system's automatic mapping produces the correct results, then select the columns to use and run the import process.

If the results of the automatic mapping are not correct, use the fields to select a different field name and column mapping. Then, name and save the map to make it available from the specified template in the future.

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You can create and save as many maps as you want. You can also create new templates. When you create a template, the system automatically creates a default import map for you.

Note. To create import templates, you must have the proper security permissions in your sales access profile.

See Also

Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Templates for Importing Leads, page 58

Pages Used to Import Sales Lead Data

Page Name	Object Name	Navigation	Usage
Import Sales Leads	RB_IMP_RUN	Sales, Import Leads	Select the template, map, and spreadsheet for importing lead data and run the import process.
Lead Import Template	RB_IMP_TEMPL_DISPL	Click the View Template Definition link on the Import Sales Leads page.	View a display-only version of the specified template's definition.
Sales Leads Import Results	RSF_LE_IMP_RESULTS	Sales, Import Leads Click the View Results button.	View results of the lead data import process.
Import Error Information	RSF_LE_VIV_ERR	Sales, Leads, Import Sales Leads Click the View Errors button on the Sales Lead Import Results page.	View results of the lead data import process.
Batch Info, , All Imported Leads	RB_IMP_SEARCH	Sales, Search Imported Leads	Search for imported lead data.

Importing Lead Data from an External File

Access the Import Sales Leads page.

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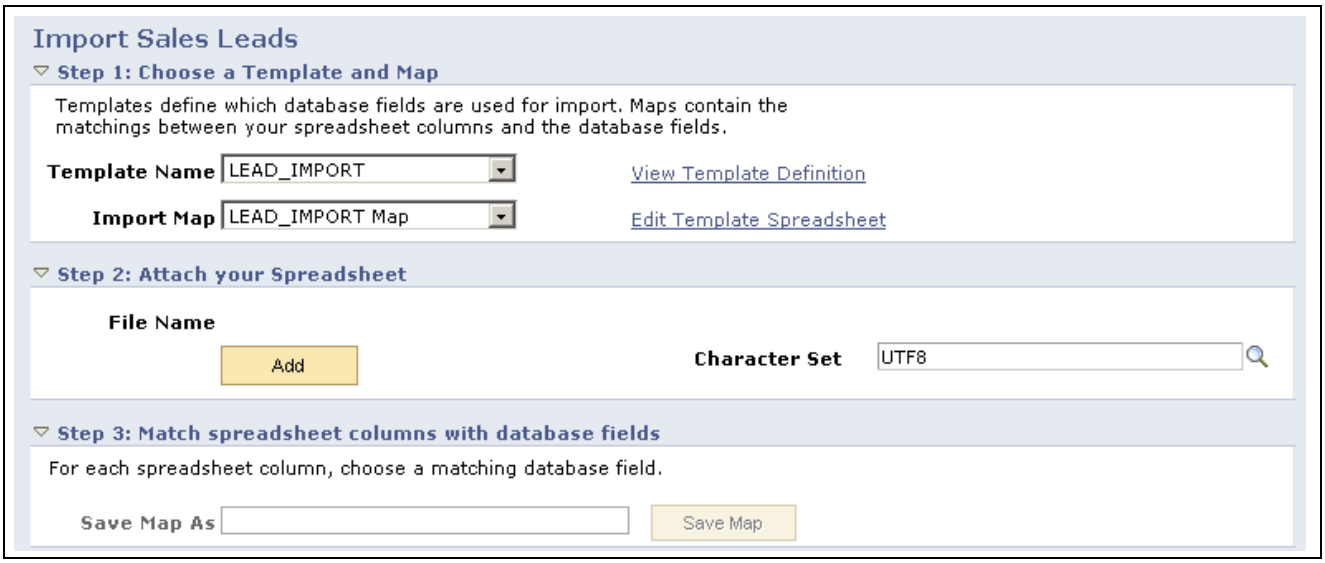

Import Sales Leads page (1 of 2)

Import Sales Leads page (2 of 2)

Step 1: Choose a Template and Map

Template Name Select the import template to use. Import templates identify the components that provide the database fields.

View Template Definition Select to access a display-only version of the Import Template page for a specified template.

Import Map Select the import map to use. The import map identifies which spreadsheet columns populate the various fields in your database, and it identifies which columns to import.

Edit Template Spreadsheet Select to launch a new window with the Microsoft Excel spreadsheet template with column headings only. You can enter data (including placeholder data for required fields) or paste data from another spreadsheet.

Note. If you make changes, be sure to save the spreadsheet before closing the window.

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Step 2: Attach the Spreadsheet

Add Click to access the search page, where you can enter or browse for the path to the comma-delimited file of lead data to import.

Upload Click to upload the file after identifying the path to the file. The system loads the spreadsheet and attempts to map the spreadsheet columns to the database fields identified on the selected template and map. The system accesses the Import Sales Leads page and displays the name of the uploaded file and mapping results.

Delete Click to delete the uploaded file. The Add button appears. Click Add to browse for a different file to upload.

View Click to open a new window where you can view the uploaded spreadsheet to confirm that it is the correct spreadsheet to use.

Step 3: Match spreadsheet columns with database fields

If the columns and fields are acceptable as mapped, run the import process by selecting options in the Step 4: Run the Import group box.

If the automatic mapping is not acceptable, use the fields labeled Parent Name and Database field name to select the correct field for each column. Then, enter a map name in the Save Map As field, and click Save Map. The map appears in the map drop-down list for that template.

Note. The Dedup check boxes indicate data that the system uses to check for duplicates. You specify the data for determining duplicates when you create the template definition. If you have the necessary permissions, you can edit the Dedup check boxes used for determining duplicates.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Templates for Importing Leads, page 58.

Step 4: Run the Import

Specify how the import runs—in real time or in a batch process at a later time.

Run Import Click to submit the run request to the system.

View Results Click to view import results after the process has run.

Process Monitor Click to access the Process List page, where you can confirm that the request was received and determine its status.

Execute AAF during Lead Import Select to launch AAF policies when an imported lead contains the necessary conditions to trigger execution.

Viewing a Template Definition

Access the Lead Import Template page.

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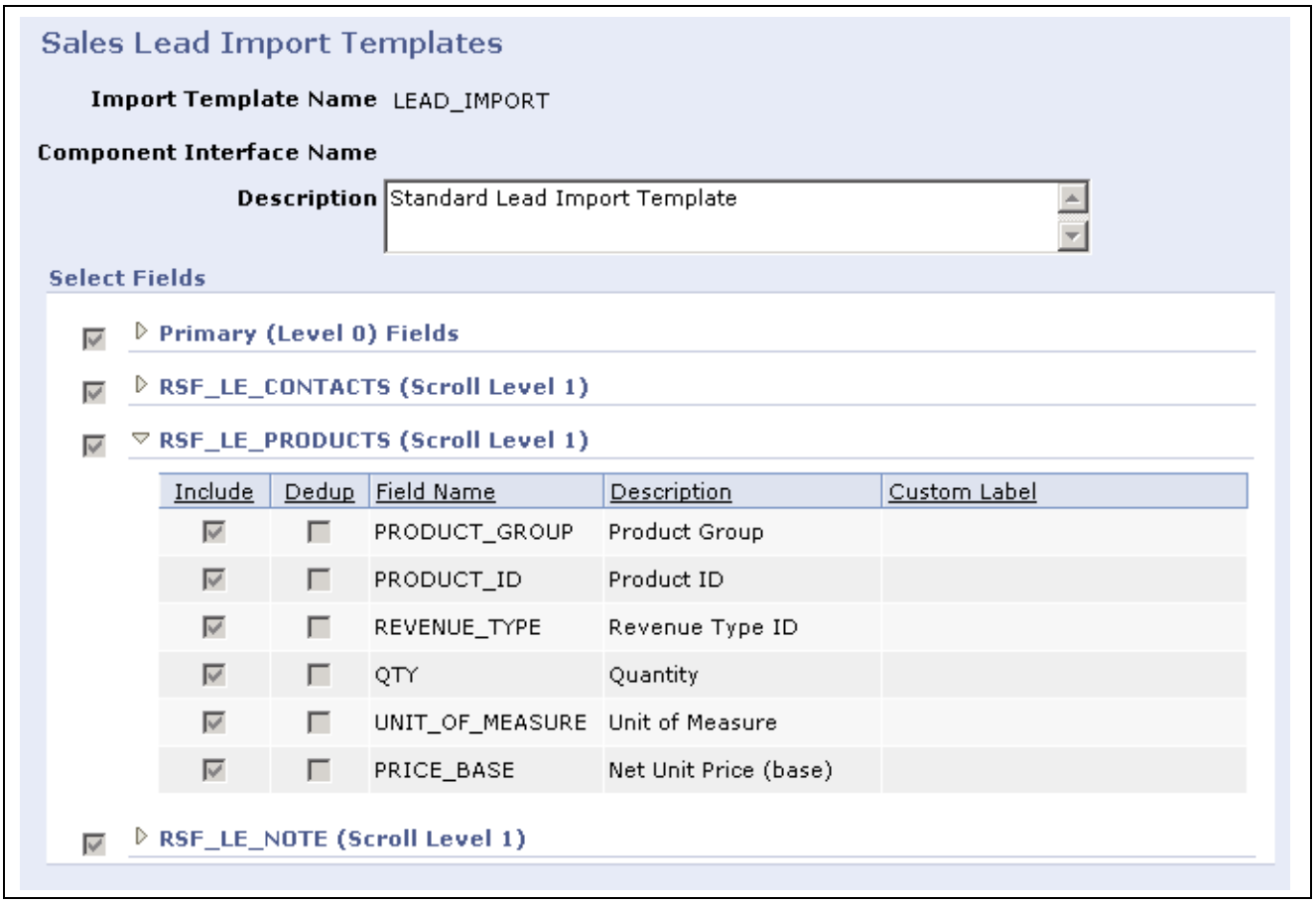

Sales Lead Import Templates page

This page is a display-only version of the Import Template page, so that you can view the template definition. To create or edit an import template, you must access the editable version of this page if your PeopleSoft Enterprise Sales access profile permits.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Templates for Importing Leads, page 58.

Viewing Lead Import Results

Access the Sales Leads Import Results page.

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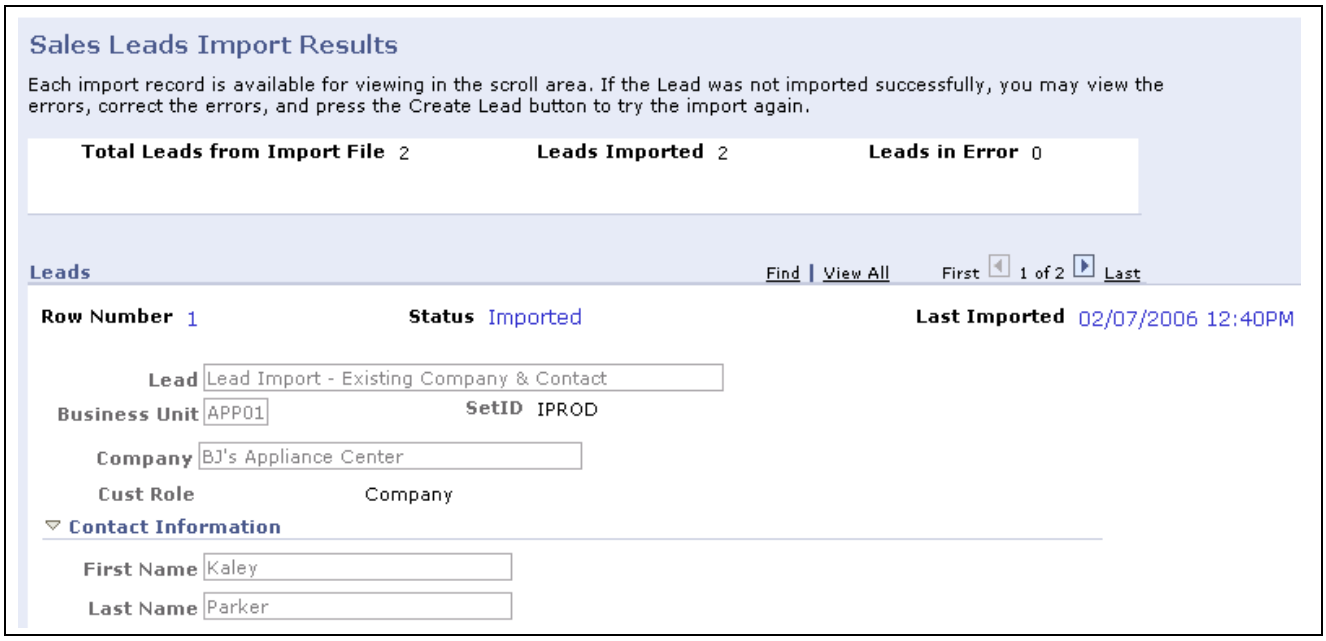

Sales Leads Import Results page

View the details of each lead that was imported. Edit imported data as necessary.

When the data is correct, click Submit All to submit all lead data without further adjustment.

If a lead is a prospect, you can leave it as a prospect or push it to the CDM.

Note. For customers, the Customer field is displayed as a hyperlink; for prospects, it is displayed as an editable field.

Note. If an imported lead has a sales representative's person ID in an ID column, the system assigns the lead to that representative. If the imported lead has no person ID and the Auto Assign check box is selected, the system assigns a sales representative by using a territory tree. If the imported lead has no person ID and the Auto Assign check box is not selected, the lead is not assigned. You can search for unassigned leads on the Search Leads page.

If the imported lead does not have a rating, it is subject to auto rating.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Assignment Weights, page 42 and Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Lead Ratings, page 38.

Import Zone

If errors occurred during the import process, the Import Zone group box appears.

View Errors Click to access the Lead Import Errors page, where you can determine the errors that occurred.

Create Lead Click to import leads one by one. Each time that you click this button, the system submits only the lead that appears in the Sales Leads group box.

See Also

Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Templates for Importing Leads, page 58

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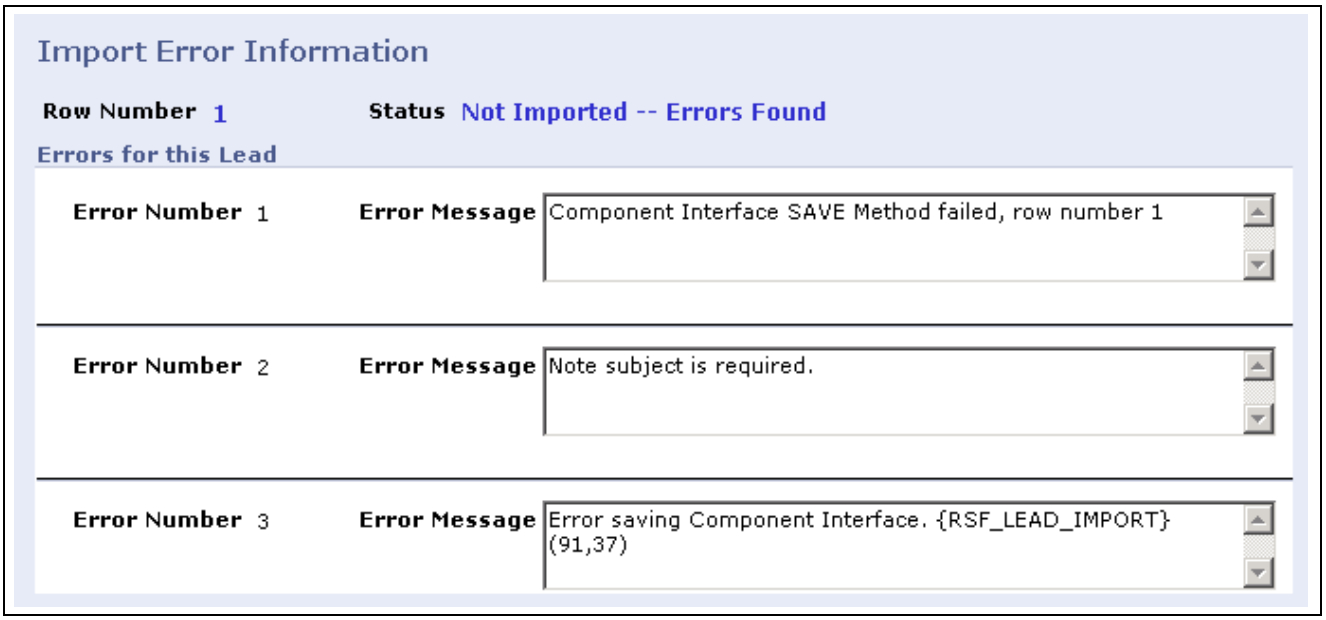
Viewing Lead Import Errors

Access the Import Error Information page.



Import Error Information page

Determine the nature of each import error so that you can decide how to fix it.

Searching for Imported Data

Access the Batch Info page.

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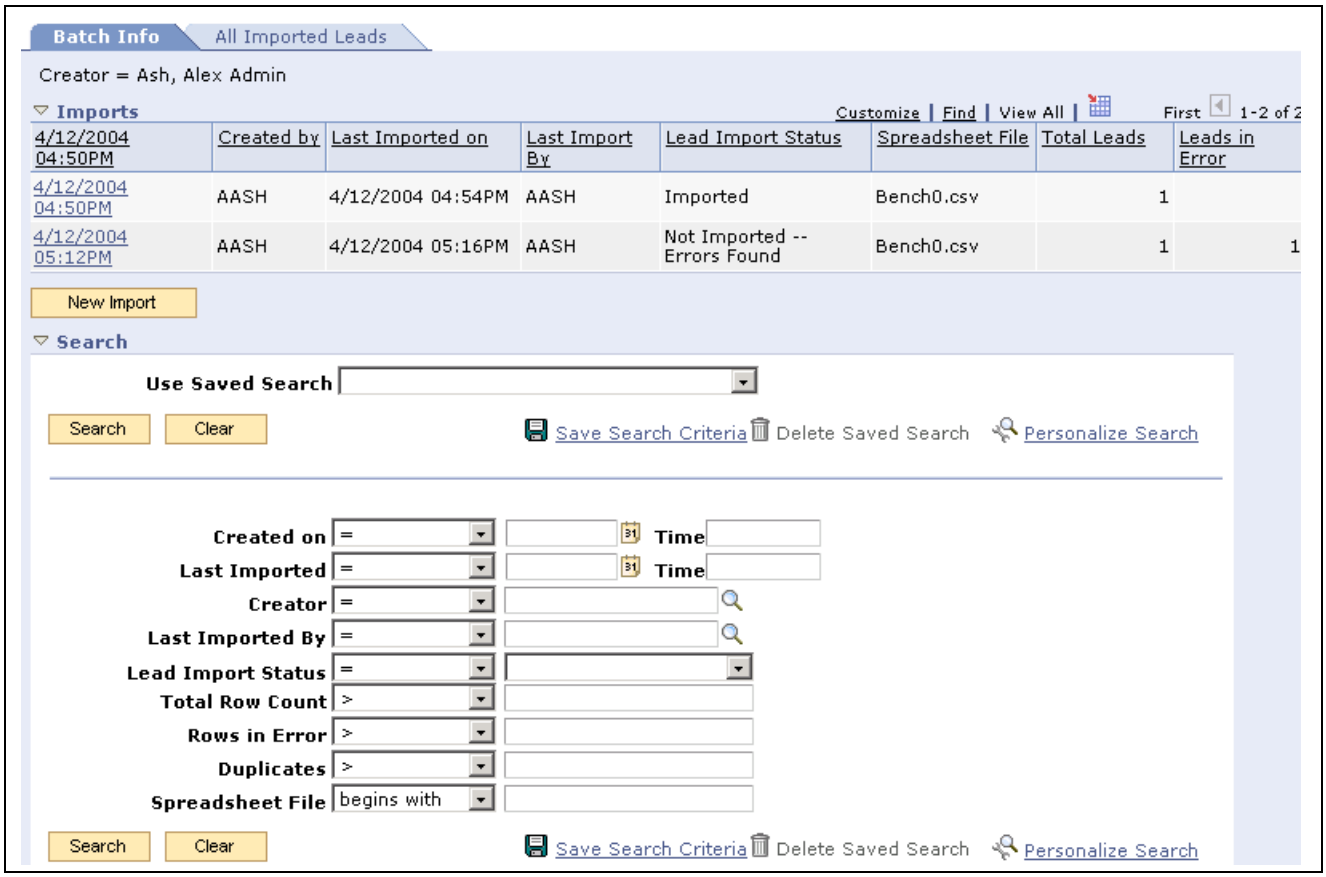

Batch Info (batch information) page

Use the Batch Info page to search for and view a list of imported lead data by run parameters.

Use the All Imported Leads page to search for and view a list of imported leads data by lead parameters.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Configuring Search Pages”

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CHAPTER 13

Assigning a Lead or Opportunity

This chapter provides an overview of sales representative assignment, lists common elements, and discusses how to:

- Assign sales representatives to a lead or opportunity.
- Accept, reject, or turn back a lead assignment.
- Assign partners to a lead or opportunity.
- Reassign a sales representative's leads, opportunities, and accounts.

Common Elements Used in This Chapter

New Rep (new representative)	Select the sales representative to assign to a lead, opportunity, or account on a reassignment worksheet.
New Territory	Select the territory for a sales representative on a reassignment worksheet.

Understanding Sales Representative Assignment

PeopleSoft Enterprise Sales offers three methods of assigning sales representatives to the sales team for a lead or opportunity:

- You can manually choose sales representatives or a sales team to assign to the lead sales team or the opportunity sales team.
- You can use the assignment engine to generate a list of sales representatives from the highest ranked territories and then manually select representatives from the list.

  The assignment engine uses options and criteria specified for the assignment group to determine the highest ranked territories.
- You can use the assignment engine to select a sales representative automatically based on options and criteria that you specify for the assignment group.

See Chapter 7, "Configuring Assignment Criteria," page 81.

Assigning Sales Representatives to a Lead or Opportunity

This section discusses how to:

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- Assign the sales representative.
- Select sales representatives to assign.
- Maintain data for the sales representative assignment.

Pages Used to Assign Sales Representatives to a Lead or Opportunity

Page Name	Object Name	Navigation	Usage
Search Leads	RSF_LEADS_HOME_GRD	Sales, Search Leads	Search for leads.
Lead - Assign	RSF_LEAD_ASSIGN	Select a lead on the Search Leads page. Select the Assign tab.	Assign a sales representative to the lead.
Search Opportunities	RSF_OPP_HOMEPAGE	Sales, Search Opportunities	Search for opportunities.
Opportunity - Assign	RSF_OPP_ASSIGN	• Select an opportunity on the Search Opportunities page. Select the Assign tab. • Select an opportunity on the Search Opportunities page. Click the Add Team link on the Opportunity - Summary page.	Assign a sales representative to the opportunity.
Assign Sales Representative	RSF_ASSIGN_TEAM_L	On the Lead - Assign page, click the Assign Sales Rep button. The page appears only if the assignment configuration is set to manual selection.	Manually select sales representatives for the lead, and specify the primary lead team representative.
Assign Sales Representative	RSF_ASSIGN_TEAM_O	On the Opportunity - Assign page, click the Assign Sales Rep button. The page appears only if the assignment configuration is set to manual selection.	Manually select sales representatives for the opportunity, and specify the primary opportunity team representative.
Organization	RSF_TR_HTREE_SEC	On the Lead - Assign page or the Opportunity - Assign page, click the View Sales Organization button.	View the organization or territory to which the representative belongs.

Assigning the Sales Representative

Access the Lead - Assign page or the Opportunity - Assign page.

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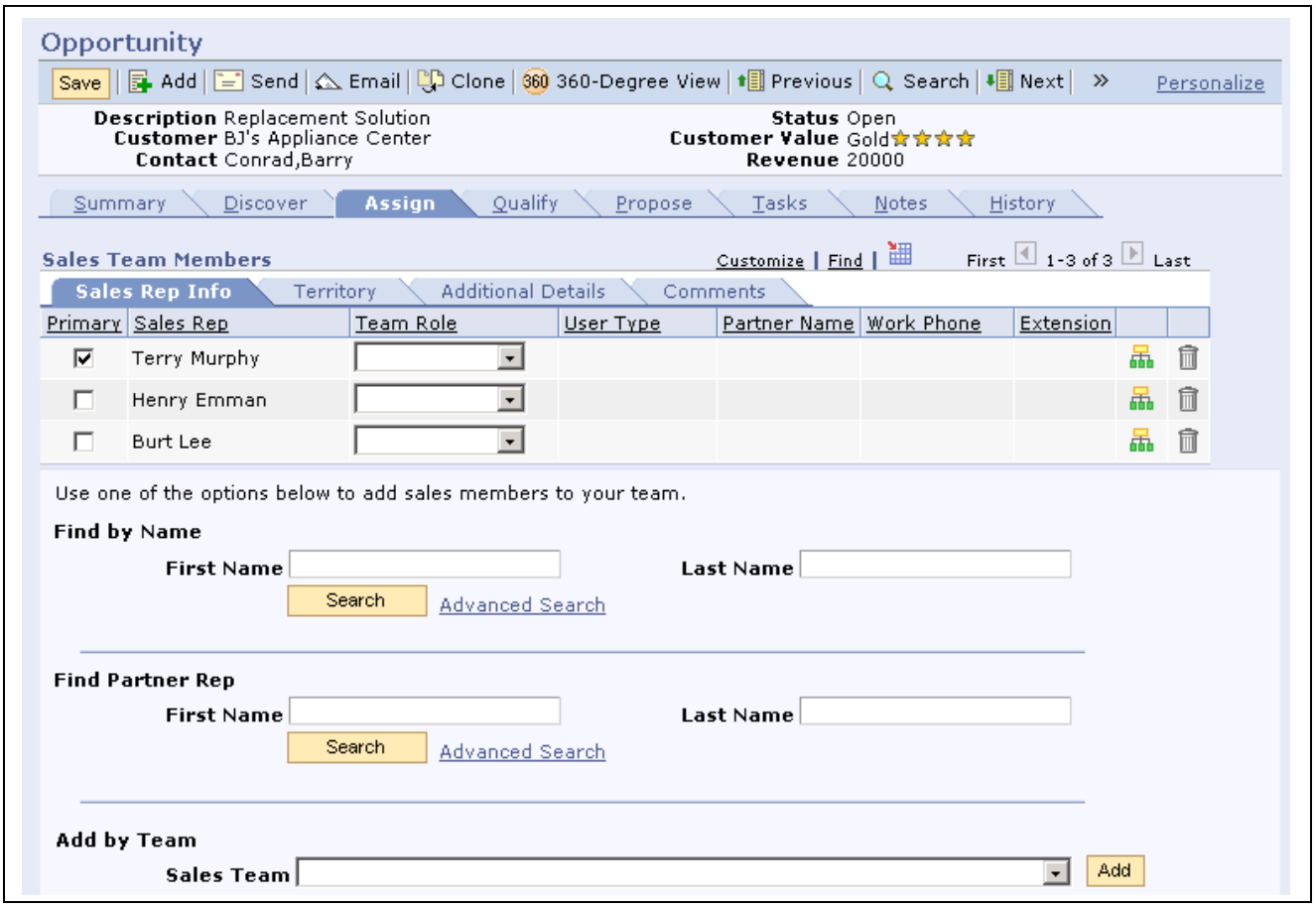
Note. The Assign page appears in both the Lead component and the Opportunity component. Although the following example shows the Opportunity component, the information provided applies to both leads and opportunities.



Opportunity - Assign page (1 of 2)

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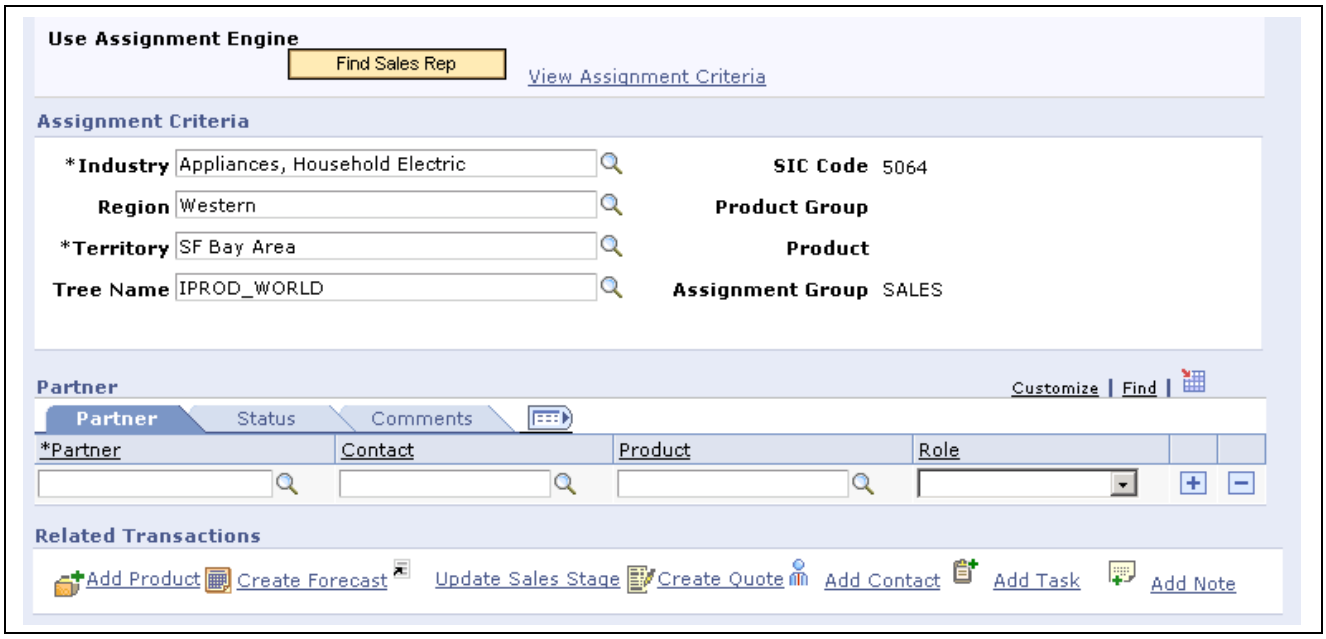

Opportunity - Assign page (2 of 2)

Note. If the lead was converted to an opportunity, fields are unavailable on the Lead - Assign page. Access the Opportunity - Assign page to update the data.

If you do not want to use the assignment engine, you can search for and assign a sales representative to the sales team of the lead or opportunity by using the Find by Name section of the page. Similarly, you can search for and assign a partner representative to the sales team of the lead or opportunity by using the Find Partner Rep (find partner representative) section of the page. Also, you can assign a sales team to the lead or opportunity by using the Add by Team section of the page.

Define sales teams on the Sales Team page.

See Chapter 4, "Setting Up Sales Security and Personalization," Setting Up Sales Teams, page 25.

Find Sales Rep (find sales representative)

Click to initiate the assignment engine.

If you have set the assignment mode on the assignment group to *Automatic Assignment,* the system finds the best suited sales representative based on the assignment criteria and enters that sales representative's data in the Sales Team Members section of the page.

If you have set the assignment mode on the assignment group to *Manual Selection,* the list of sales representatives on the Assign Sales Representative page appears so that you can select the sales representative for assignment to the lead or opportunity.

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Note. If the lead or opportunity has one existing primary sales representative and the assignment engine returns a new primary sales representative, the system replaces the old primary representative with the new primary representative and moves the revenue allocation from the old primary representative to the new primary representative.

If the lead or opportunity has multiple existing primary sales representative and the assignment engine returns a new primary sales representative, the system adds the new representative as the primary representative and keeps the existing representatives.

View Assignment Criteria Click to display the assignment criteria on the page. Typically, you do not change the fields in the Assignment Criteria section. However, the system does allow you to edit the Industry, Region, Territory, and Tree Name fields.

This link acts as a toggle. If the Assignment Criteria section is currently displayed, clicking the link causes it to not display.

Industry The system populates this field with the industry, if any, associated with the customer on the Discover page.

SIC Code (standard industrial classification code) Displays the SIC code, if any, associated with the industry.

Region The system populates this field with the region, if any, associated with the customer on the Discover page.

Territory If you used the assignment engine to assign a primary sales representative, the system populates this field with the territory associated with the primary sales representative.

Product Group and **Product** Displays the primary product information from the Product grid on the Propose page.

Tree Name The system populates this field with the default territory tree for the primary sales representative.

Assignment Group Displays the default assignment group for the business unit.

Selecting Sales Representatives to Assign

Access the Assign Sales Representative page.

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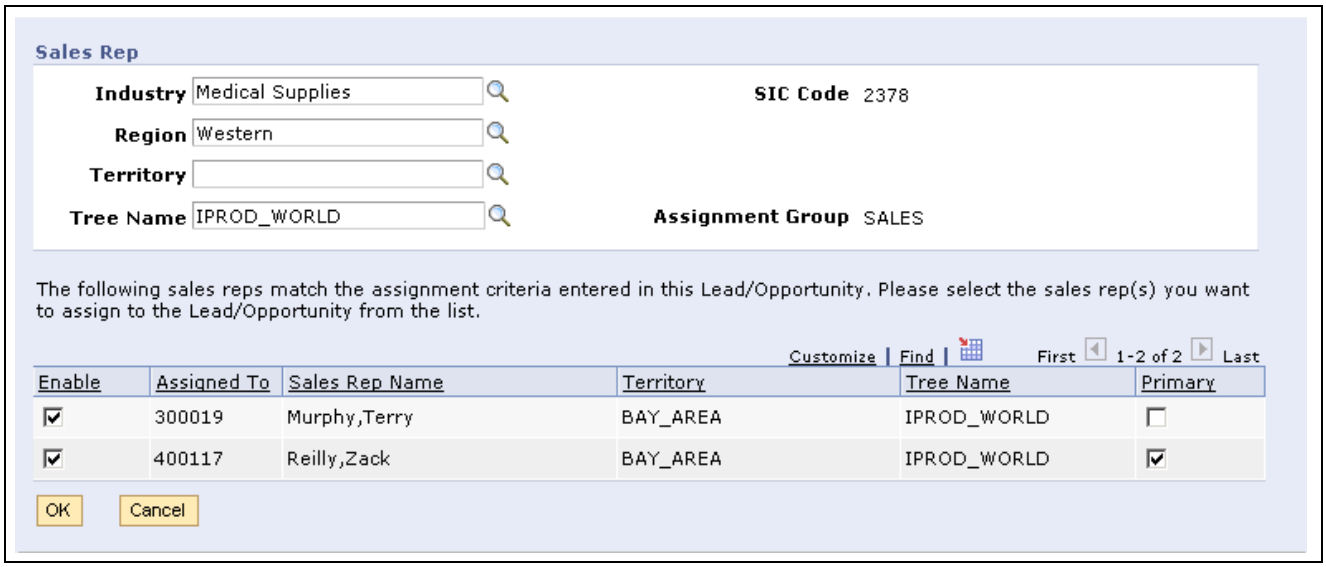

Assign Sales Representative page

This page, with the list of candidates for assignment, is available only in manual selection assignment mode. Select the sales representatives and the primary representative for the lead or opportunity.

If you want to select a sales representative who does not appear on this page, enter the representative's name in the Sales Rep field and click the Assign Sales Rep button.

Select Select to indicate the sales representatives for assignment to the lead or opportunity.

Primary Select to indicate the primary sales representative for the lead or opportunity. You can have only one primary representative for each lead or opportunity unless a partner is involved. In that case, you can have two primary representatives—one external and one internal.

Click OK to access the Assign page, which displays the primary representative's name, territory, and associated industry and region, if any.

Maintaining Data for the Sales Representative Assignment

Access the Lead - Assign page or the Opportunity - Assign page.

Sales Rep Info Tab

Select the Sales Rep Info (sales representative information) tab in the Sales Team Members section.

Primary Select to indicate the primary member of the sales team. Only one primary member can be selected, and that person should be the sales representative to whom the lead or opportunity is assigned. Only the primary sales representative is listed on many pages for the lead or opportunity.

Team Role Select the role of the sales representative on the team (for example, *Legal, Partner, Manager, Team Leader,* and so on).

See Chapter 4, "Setting Up Sales Security and Personalization," Setting Up Sales Teams, page 26.

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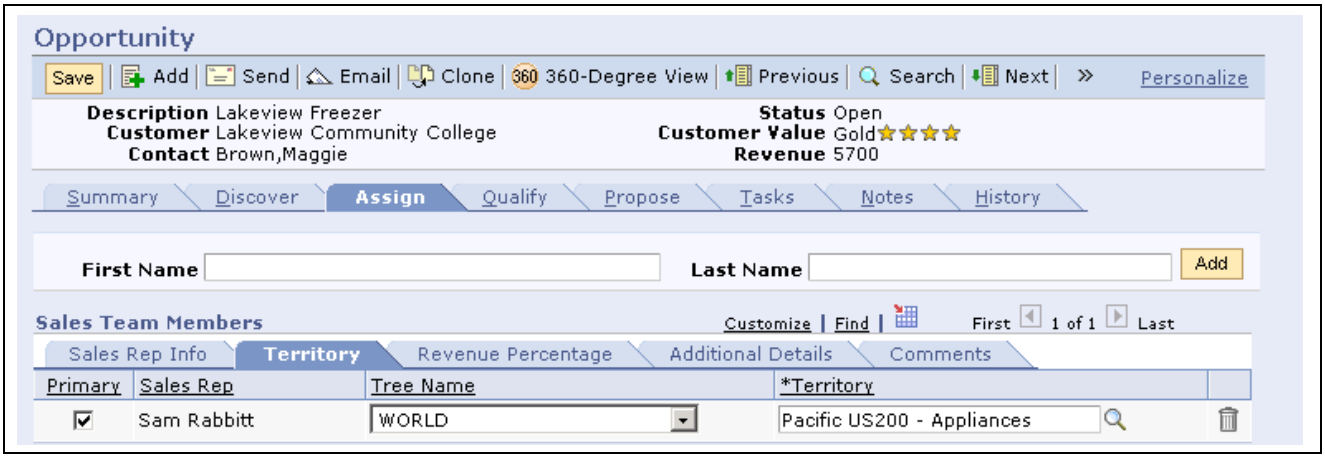
Sales User Type Displays the sales user type associated with the sales representative on the Sales User page.

See Chapter 4, "Setting Up Sales Security and Personalization," Setting Up Sales Users, page 18.

Click to access the Organization page, where you can view the organization or territory to which the representative belongs.

Territory Tab

Select the Territory tab in the Sales Team Members section.



Opportunity - Assign page: Territory tab

Tree Name After a sales representative is added to the lead or opportunity, the system displays the tree name for the sales representative as defined on the Sales User page.

Territory After a sales representative is added to the lead or opportunity, the system displays the primary territory for the sales representative as defined on the Sales User page.

Revenue Percentage Tab (Opportunities Only)

Select the Revenue Percentage tab in the Sales Team Members section of the Opportunity - Assign page. On this tab, you specify how revenues for the opportunity are allocated among the sales team. Revenue allocations are required for forecasting and for compensation calculations when you integrate with PeopleSoft Enterprise Incentive Management (PeopleSoft EIM).

See Chapter 21, "Understanding Sales Forecasts," page 237.

Note. Revenue allocations are required for an opportunity to roll up into pipelines and forecasts. Only opportunities roll up into pipelines and forecasts. You cannot include leads in pipelines and forecasts. Therefore, the Revenue Percentage tab appears in the Opportunity component only. The Revenue Percentage tab has no equivalent for the sales team in the Lead component.

Typically, only sales managers and administrators have access to the Revenue Percentage tab. Access depends on the setting in the user's sales access profile.

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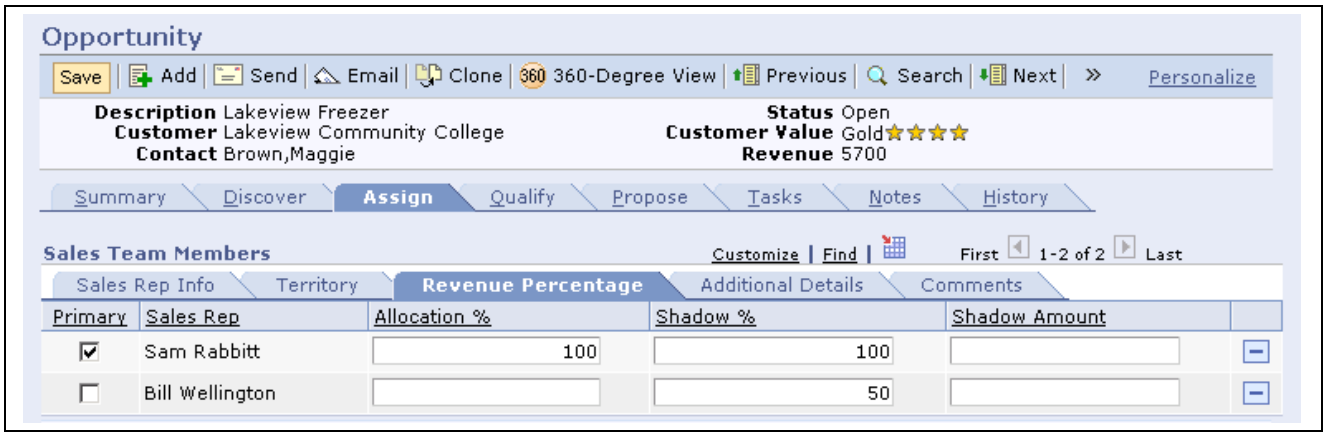

Opportunity - Assign page: Revenue Percentage tab

Allocation % (allocation percentage) Enter the percentage of the opportunity's revenue that is credited to the sales representative. The sum of the allocation percentages must equal 100 percent.

Shadow %(shadow percentage) Enter the percentage of the opportunity's revenue that is credited to the sales representative when calculating performance against quotas. The sum of the allocation percentages does not need to equal 100 percent. You can use this field to give a secondary sales representative partial credit for an opportunity's revenue.

Shadow Amount Enter a dollar amount that is credited to the sales representative when calculating performance against quotas. The system calculates the total shadow forecast for a sales representative by multiplying the estimated revenue by the shadow percentage and then adding the shadow amount.

Additional Details Tab

Select the Additional Details tab in the Sales Team Members section.

The system displays additional information about each team member, including company name, country code, and cell phone number. The information comes from the Person record or the Sales User page. If the team member is a partner, the information comes from the Company record. If the team member is a partner contact, the information comes from the Contact component.

Comments Tab

Select the Comments tab in the Sales Team Members section.

Enter comments to describe a sales team member.

Accepting, Rejecting, or Turning Back a Lead Assignment

This section discusses how to accept, reject, or turn back a lead assignment.

Note. Only the assignment of a lead can be accepted, rejected, or turned back. You cannot accept, reject, or turn back the assignment of an opportunity. Therefore, the Accept/Reject Lead section appears on the Assign page in the Lead component only. The Accept/Reject page has no equivalent in the Opportunity component.

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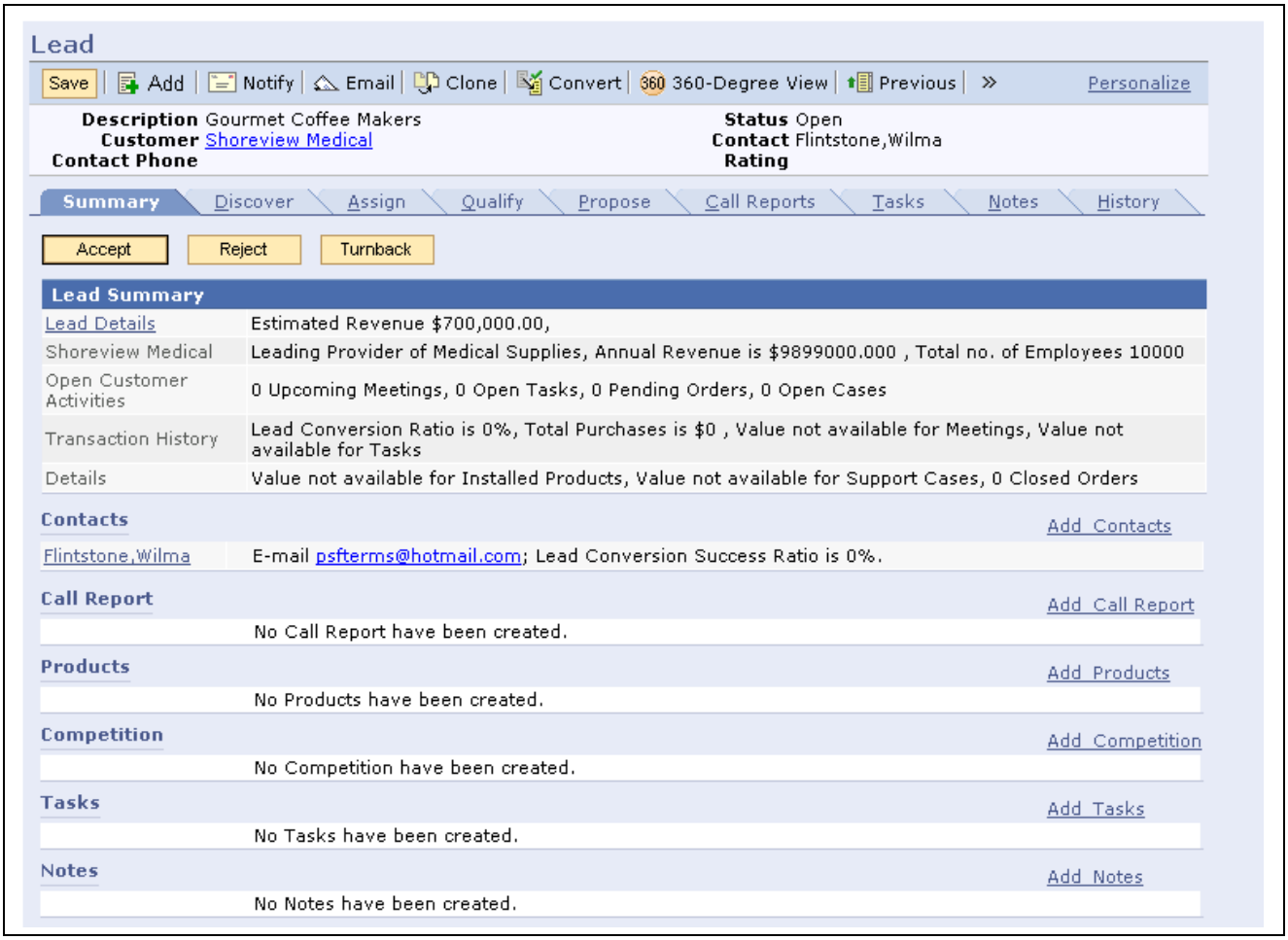
Pages Used to Accept, Reject, or Turn Back a Lead Assignment

Page Name	Object Name	Navigation	Usage
Search Leads	RSF_LEAD_ENTRY	Sales, Search Leads	Search for an existing lead.
Lead - Summary	RSF_LEAD_SUMMARY	Select a lead on the Search Leads page.	Accept, reject, or turn back a lead assignment.

Accepting, Rejecting, or Turning Back Lead Assignments

Access the Lead - Summary page.



Lead - Summary page

You can accept, reject, or turn back a lead that has the status of *New* or *Open.* Lead workflow rules trigger the appropriate email or worklist notifications when a lead is not accepted or is rejected within the maximum delay time associated with the lead rating.

Accept

Click to accept the lead.

The system changes the lead status to *Accepted* and makes the lead available for you to work on, convert to an opportunity, and close the sale.

You cannot leave an accepted lead unassigned. If the lead is unassigned when it is accepted, the system assigns it to the sales user who accepts it. That user

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can assign the lead to another representative only if the Manually Reassign Leads option is selected on the user's sales access profile.

Reject Click to reject the lead.

If your sales access profile enables you to reassign leads manually, you can assign the lead to another representative.

Turnback Click to clear your name from the lead and turn back the lead to the list of active unassigned leads so that it can be assigned to someone else.

If your sales access profile allows you to reassign leads manually, you can assign the lead to another representative.

Reason and **Comments** These fields appear when you reject or turn back a lead. Select reasons for not accepting the lead. You can also enter comments to describe the reason.

Assigning Partners to a Lead or Opportunity

This section discusses how to assign partners to a lead or opportunity.

Pages Used to Assign Partners to a Lead or Opportunity

Page Name	Object Name	Navigation	Usage
Search Leads	RSF_LEADS_HOME_GRD	Sales, Search Leads	Search for leads.
Lead - Assign	RSF_LEAD_ASSIGN	Select a lead on the Search Leads page. Select the Assign tab.	Assign partners to the lead.
Search Opportunities	RSF_OPP_HOMEPAGE	Sales, Search Opportunities	Search for opportunities.
Opportunity - Assign	RSF_OPP_ASSIGN	• Select an opportunity on the Search Opportunities page. Select the Assign tab. • Select an opportunity on the Search Opportunities page. Select the Add Team link on the Opportunity - Summary page.	Assign partners to the opportunity.

Assigning Partners to a Lead or Opportunity

Access the Lead - Assign page or the Opportunity - Assign page.

Note. This page appears only if PeopleSoft Partner Relationship Management (PeopleSoft PRM) is not installed.

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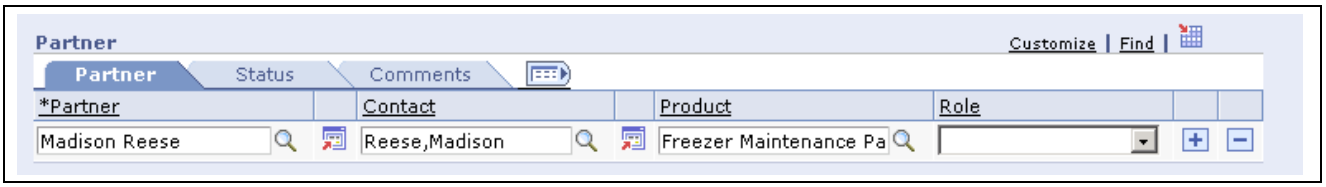

Opportunity - Assign page: Partner tab

Partner Tab

For each partner associated with the lead or opportunity, enter or select the partner's name, the contact person's name, the product, and the contact's role.

To use this page, the role type *Partner* must be set up, the partner relationship must be configured, and information about sales partners and their contacts must already be entered.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Sales Partners, page 48.

Status Tab

Enter the partner's status *(Current, Former,* or *Out of Business),* type *(Alliance Partners, Channel Partners, Distributor,* or *System Integrator),* and rating *(Excellent, Fair, Good,* or *Poor).*

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Sales Partners, page 48.

Comments Tab

Enter notes about the partner.

Reassigning a Sales Representative's Leads, Opportunities, and Accounts

This section discusses how to reassign a sales representative's leads, opportunities, and accounts.

Note. When you reorganize a tree, the system automatically reassigns leads, opportunities, and accounts within the new structure. You can generate worksheets to view the automated reassignments and adjust them. This reassignment is discussed in the documentation on tree reorganization.

See Chapter 9, "Reorganizing or Deleting a Territory Tree," page 103.

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Pages Used to Reassign a Sales Representative's Leads, Opportunities, and Accounts

Page Name	Object Name	Navigation	Usage
Reassign Sales Activities	RSF_TR_REASSIGN	Sales, Reassign Sales Activities	Reassign all of a sales user's leads and opportunities to another sales representative.
Lead Reassignment Worksheet	RSF_TR_REASS_LEAD	Click the Review Worksheets button on the Reassign Sales Activities page.	Preview the system's reassignment selections for a sales representative's leads and make changes before submitting. You can manually assign the leads to different sales representatives.
Opportunity Reassignment Worksheet	RSF_TR_REASS_OPP	Click Next on the Lead Reassignment Worksheet page.	Preview the system's reassignment selections for a sales representative's opportunities and make changes before submitting. You can manually assign the opportunities to different sales representatives.
Account Reassignment Worksheet	RSF_TR_REA_ACCT	Click Next on the Opportunity Reassignment Worksheet.	Preview the system's reassignment selections for a sales representative's accounts and make changes before submitting. You can manually assign the accounts to different sales representatives.

Reassigning a Sales Representative's Leads, Opportunities, and Accounts

Access the Reassign Sales Activities page.

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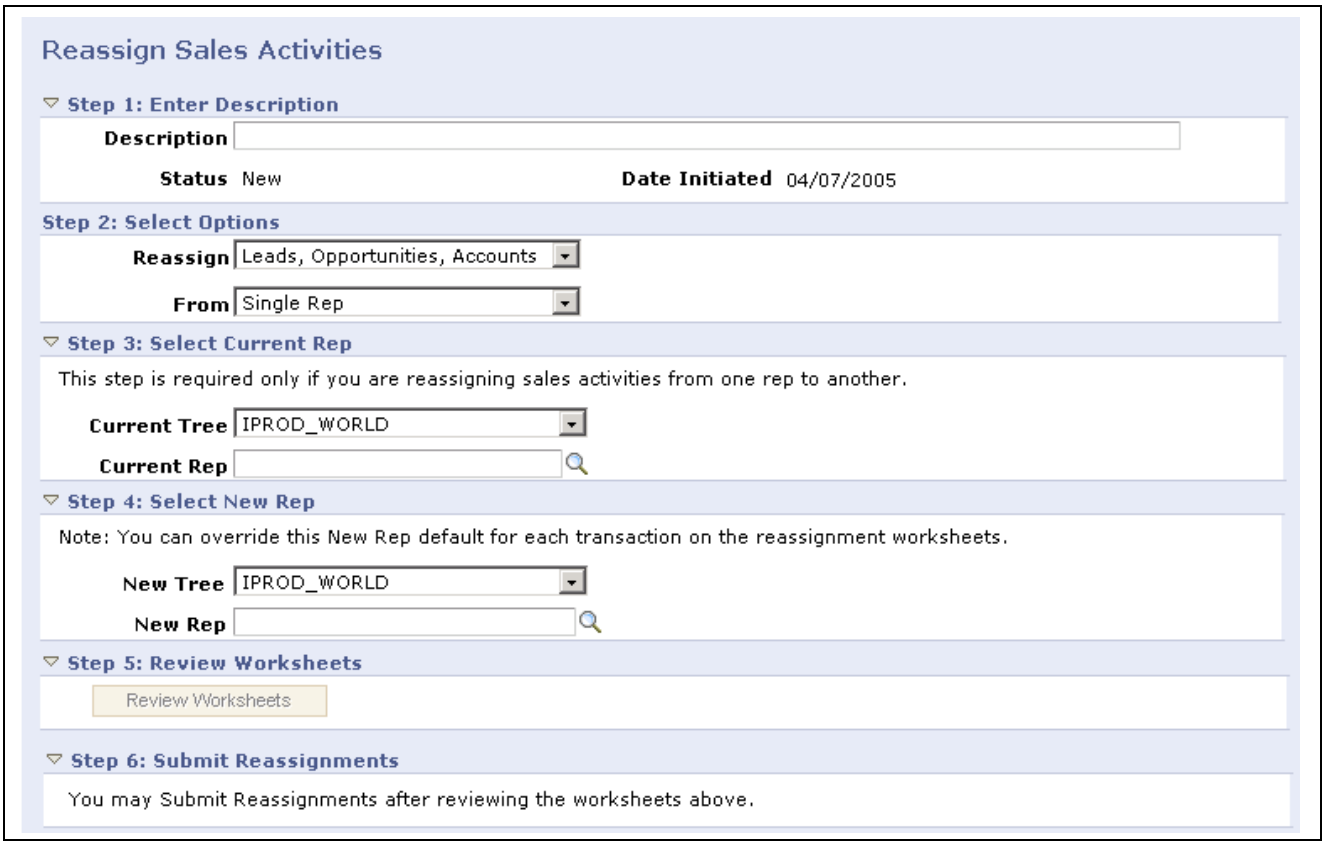
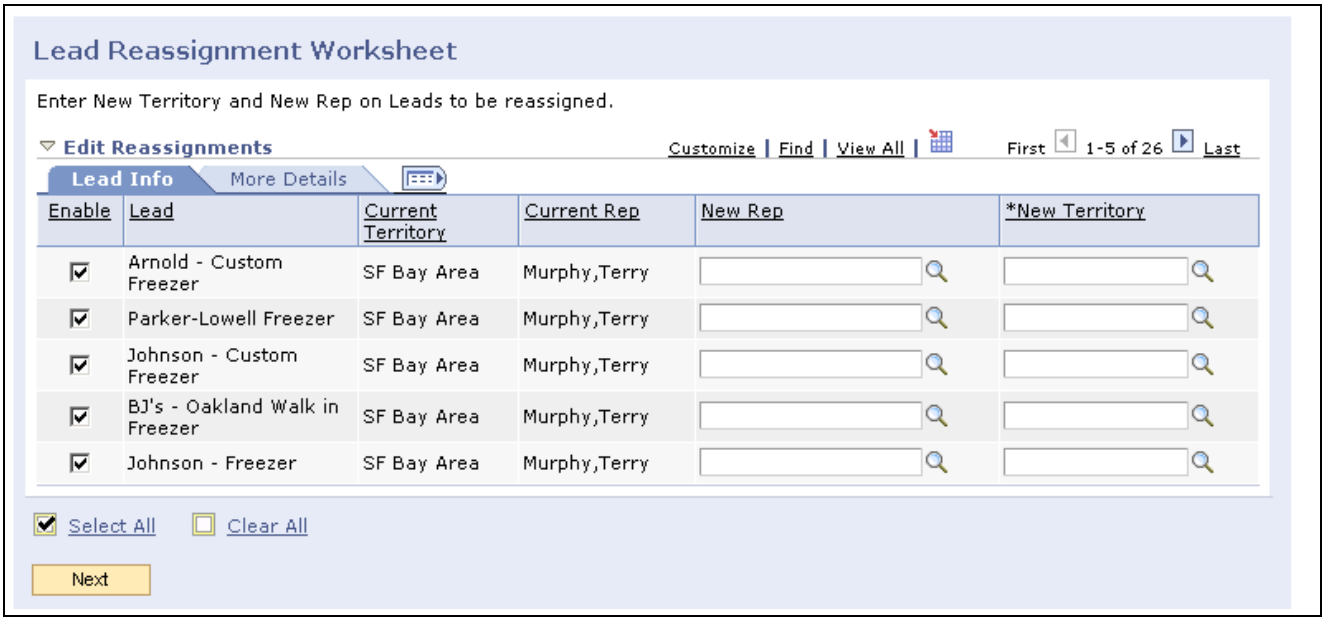


Reassign Sales Activities page



Lead Reassignment Worksheet page

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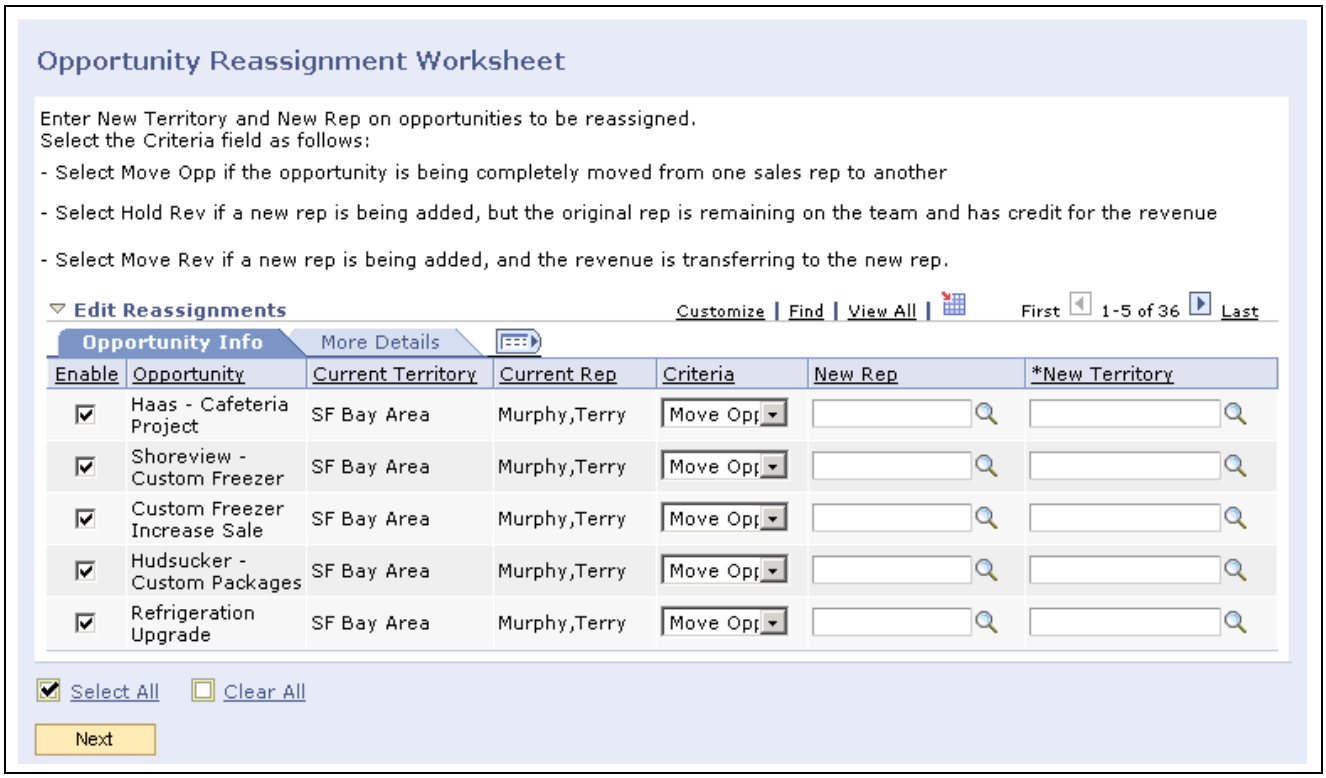
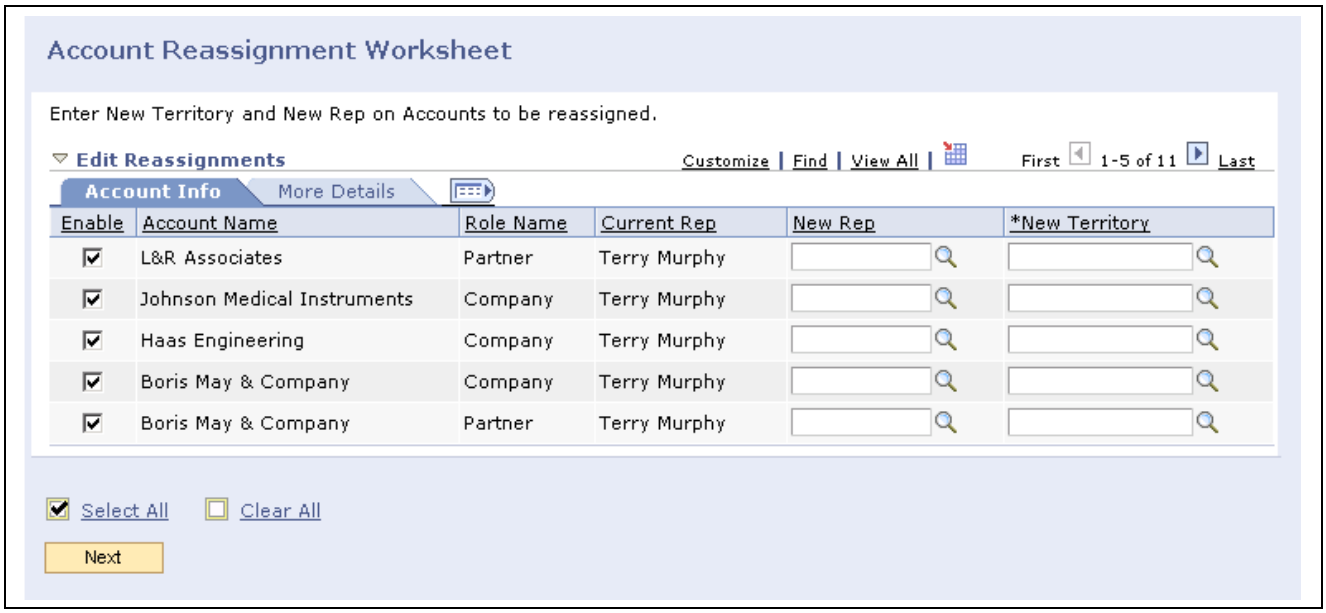


Opportunity Reassignment Worksheet page



Account Reassignment Worksheet page

The steps, which are represented by group boxes on the page, enable you to reassign leads and opportunities to one or more sales representatives. Buttons and links change dynamically as you complete the steps.

STEP 1: Enter Description

Description Enter a description for the reassignment.

Status Displays the current status of the reassignment. Values are *New, In Progress, Reviewed,* and *Submitted.*

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STEP 2: Select Options

Reassign Select one or more of the following values: *Leads, Opportunities,* and *Accounts.*

From Select *Single Rep* to reassign leads, opportunities, and accounts for one sales representative. Select *Unassigned* to assign leads, opportunities, and accounts that have not been assigned to a sales representative.

STEP 3: Select Current Rep

Current Tree Displays the default tree associated with the sales user. If you have access to only one tree, you cannot change this tree. If you have access to multiple trees, you can select a tree using this field.

A sales user cannot make reassignments from one tree to another—only from one territory to another on the same tree.

Current Rep(current representative) Select the name of the sales representative whose leads, opportunities, and accounts you want to reassign.

STEP 4: Select New Rep

New Tree Displays the default tree associated with the sales user. If you have access to only one tree, you cannot change this tree. If you have access to multiple trees, you can select a tree using this field.

A sales user cannot make reassignments from one tree to another—only from one territory to another on the same tree.

New Rep (new representative) If you want to reassign all of the current representative's leads and opportunities to one sales representative, select that representative here.

If not, then proceed to the next step and view the reassignment worksheets, where you can manually assign each lead or opportunity to a different sales representative.

STEP 5: Review Worksheets

Review Worksheets Click this button to access the reassignment worksheets for the reassign options that you selected in Step 2. The worksheets enable you to view the details of current assignments for each lead, opportunity, or account and assign it to a new representative. When you finish editing the selected worksheets, the Next button returns you to the Reassign Sales Activities page.

For lead reassignment worksheet, reassignment replaces Current Rep (current representative) and current territory with New Rep and New Territory, and marks the new representative as *primary.*

For opportunity reassignment worksheet:

Criteria Select the way that you want to assign revenue for each opportunity. Values are:

Move Opportunity: Removes the current representative from the opportunity, which moves the entire opportunity—with revenue allocations—from the current representative to the new representative.

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Hold Revenue: Adds the new sales representative to the opportunity but holds the revenue credit for the original sales representative.

Move Revenue: Preserves the current representative as a member of the opportunity sales team but adds the new sales representative as the primary representative for the opportunity. This action moves the revenue credit from the original sales representative to the new primary representative.

STEP 6: Submit Reassignments

Submit Reassignments Click to submit all selected assignments. The system updates the leads and opportunities with the new sales representatives and their territories, and returns you to the Territory Reassignment page.

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CHAPTER 14

Qualifying a Lead or Opportunity

This chapter discusses how to:

- Associate a lead or opportunity with a source campaign.
- Run a survey for a lead or opportunity.

Associating a Lead or Opportunity with a Source Campaign

This section discusses how to:

- Associate a lead or opportunity with a source campaign.
- View a summary of the marketing activity for the lead.

Pages Used to Associate a Lead or Opportunity with a Source Campaign

Page Name	Object Name	Navigation	Usage
Lead - Qualify	RSF_LEAD_QUALIFY	Sales, Search Leads Select a sales lead and select the Qualify tab.	Associate a lead with a source campaign.
Opportunity - Qualify	RSF_OPP_QUALIFY	Sales, Search Opportunities Select a sales opportunity and select the Qualify tab.	Associate an opportunity with a source campaign.
Marketing Activity Summary	RA_ACT_SUMM	Click the Marketing Activity Summary link that appears in the Campaign section of the Lead - Qualify page or the Opportunity - Qualify page.	View a summary of the marketing campaign with which the lead or opportunity is associated. **Note.** This link is available only if the lead contains marketing information.

Associating a Lead or Opportunity with a Source Campaign

Access the Lead - Qualify page or the Opportunity - Qualify page.

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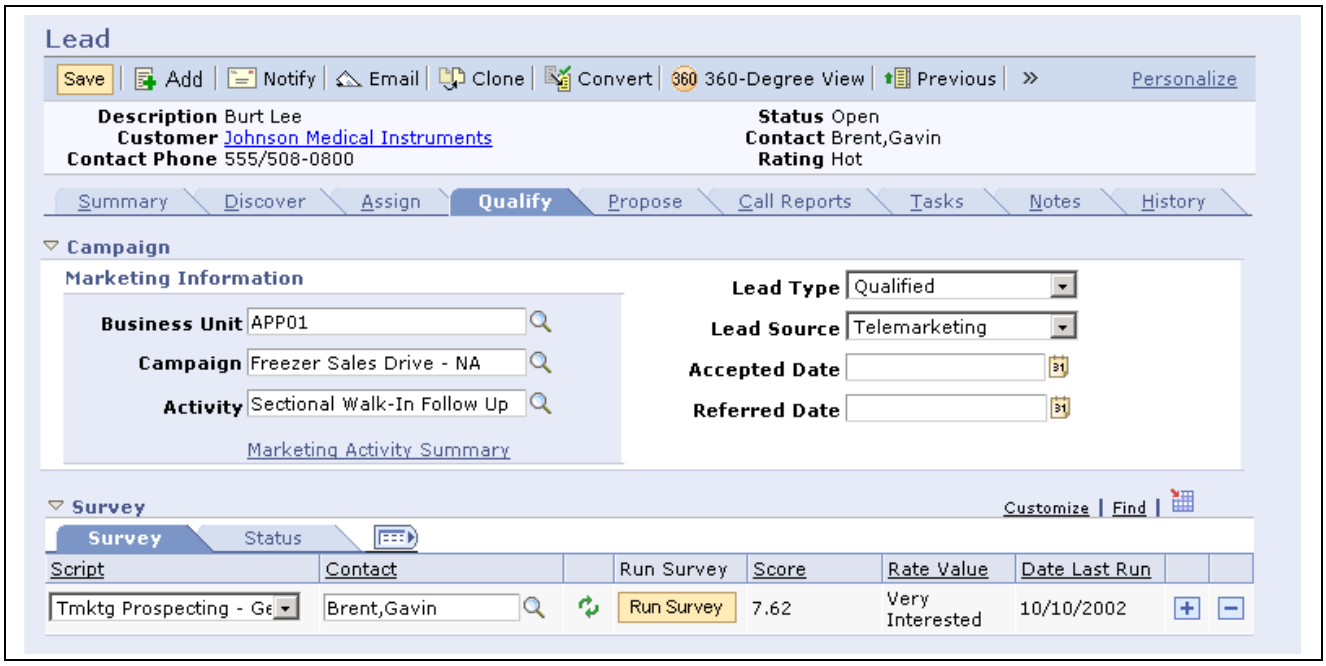
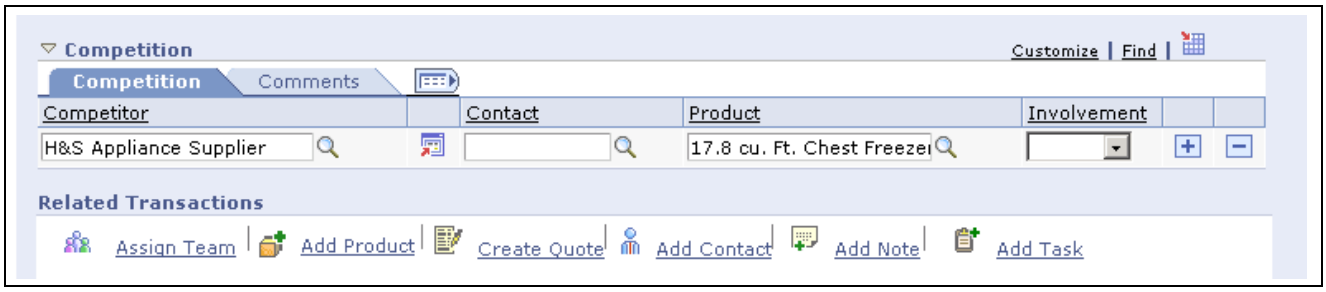
Note. The Campaign section appears on the Qualify page in both the Lead component and the Opportunity component. Although the following example shows the Lead component, the information here applies to both leads and opportunities.



Lead - Qualify page (1 of 2)



Lead - Qualify page (2 of 2)

If the lead or opportunity originates from a PeopleSoft Marketing or Telemarketing campaign, the system populates the Lead Source field and displays information that is relevant—including the marketing business unit, campaign name, and wave name—to the campaign here. If the lead or opportunity does not originate from a campaign, these fields are blank. If a sales user creates the lead, the system enters the lead source of *Sales*.

You can override these values. If you enter a marketing business unit, campaign name, or wave name, you must also enter the other two items.

Note. If PeopleSoft FieldService and PeopleSoft Customer Relationship Management (PeopleSoft CRM) for High Technology are integrated with the system, the system generates sales leads for agreements that are expired (or about to expire) according to the user-defined time period. The system creates a sales lead with the source of *Agreement* for every agreement that is eligible for the process.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Managing Agreements and Warranties," Generating Sales Leads for Agreement Renewal.

Business Unit Enter the business unit that incurs the cost of the campaign.

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Campaign Name Enter the campaign from which the lead or opportunity originated. When you specify a business unit, the system populates this field with the campaigns from that business unit.

Activity Name Enter the activity from which the lead or opportunity originated. When you specify a campaign, the system populates this field with the activities from that campaign only.

Marketing Activity Summary Click to access the Marketing Activity Summary page, where you can view a summary of the marketing campaign that generated the lead.

Lead Type Select a type to indicate the nature of the lead. Possible values are *Inquiry, Lead, Qualified, Turnback Qualified,* and *Turnback.* These lead types are translate values that are delivered with the system. Except for *Qualified,* which is required to transfer leads from Telemarketing or other PeopleSoft Enterprise products, you can modify these or define additional values.

Lead Source Select the source from which the lead originated. Possible values are *Sales, Marketing, Telemarketing, Online Marketing,* and *High Technology Agreement.* If a sales user creates the lead, the source is *Sales.*

Lead sources are predefined in the system. You can modify the descriptions on the Lead Source setup page. You can define additional values also, but do not delete the predefined ones. They are required for transferring leads between integrated system applications.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Lead Sources, page 56.

Note. When you clone a lead, the system sets the lead source to *Sales* for the new lead. However, the new lead continues to be tracked with the campaign and wave of the original lead.

Accepted Date Enter the date when the sales representative accepted the lead.

When you change the lead status to *Accepted* on any page, the system changes the status here and sets the accepted date to the system's current date.

Referred Date Enter the date when you received the prospect information (for example, from a trade show).

When you change the lead status to *Referred* on any page, the system changes the status here and sets the referred date to the system's current date.

Competition

Enter the competitor's name, the contact name, and the product, and select the involvement, which can be *Equal, Strong,* or *Weak.* Set up competitors in the Customers CRM menu.

To select a company as a competitor, you must set up the role type of *Competitor*, and set up companies and their contacts with a role type of *Competitor*.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Sales Competitors, page 51.

Comments

Select the Comments tab.

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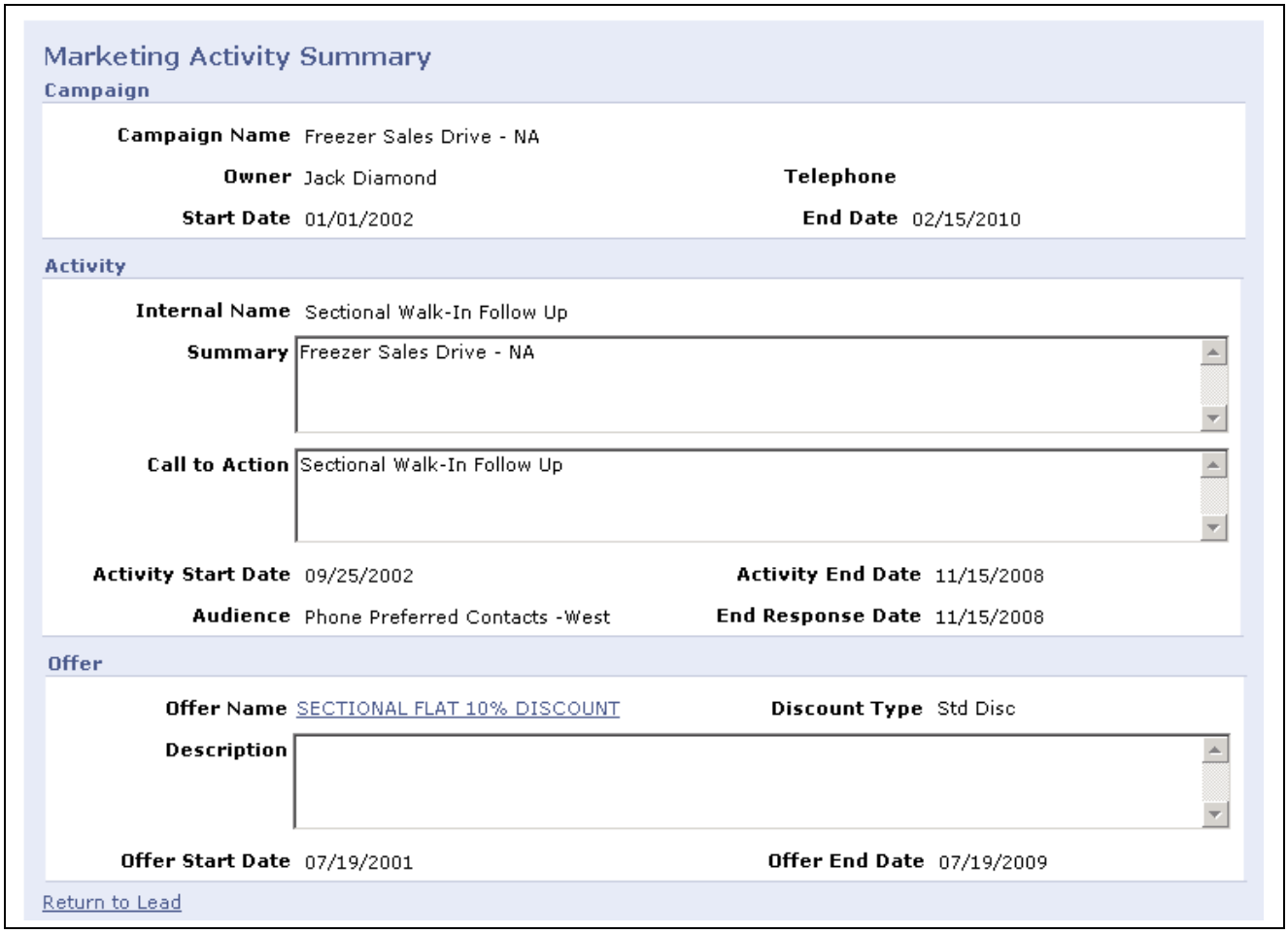
Enter notes to describe a competitor's pricing, product, or offering.

Viewing a Marketing Activity Summary

Access the Marketing Activity Summary page.



Marketing Activity Summary page

This page is read-only and displays information that you can use when deciding whether to accept the lead or not. You can click a link to view details of any promotional offers associated with the marketing campaign.

Running a Survey for a Lead or Opportunity

This section discusses how to:

- Select a survey script.
- Administer a scripted survey.

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Pages Used to Run a Survey for a Lead or Opportunity

Page Name	Object Name	Navigation	Usage
Lead - Qualify	RSF_LEAD_QUALIFY	Sales, Search Leads Select a sales lead, and select the Qualify tab.	Select the survey script for the lead.
Opportunity - Qualify	RSF_OPP_QUALIFY	Sales, Search Opportunities Select a sales opportunity, and select the Qualify tab.	Select the survey script for the opportunity.
Execute Script	RC_BS_EXECUTE_MAIN	In the Survey section of the Lead - Qualify page or the Opportunity - Qualify page, select the survey to administer, select a contact, and click the Run Survey button.	Administer a scripted survey to identify the customer's interests and to qualify the lead or opportunity.
Add Script Comment	RC_BS_COMMENT	Click the View Script Comments link on the Execute Script page.	View comments, add script comments, or delete question comments.

Selecting a Survey Script

Access the Lead - Qualify page or the Opportunity - Qualify page.

Note. The Qualify page appears in the both the Lead component and the Opportunity component. Although the following example shows the Lead component, the information here applies to both leads and opportunities.

If the lead is transferred from marketing or telemarketing, where a survey is run, information that is relevant to that survey appears here. You can run additional surveys.

Script Displays the list of scripted questions.

Contact Displays the name of the contact who answers the questions.

You can click Refresh to update the search list with the contacts for this lead and then select the appropriate contact from that list.

Run Survey Click to access the Execute Script page, where the system leads you through scripted questions and assigns a score and rating to the prospect based on the contact's answers.

Note. After you run a survey, you cannot delete it from this page.

See Chapter 14, "Qualifying a Lead or Opportunity," Administering a Scripted Survey, page 176.

Score Displays the score from the Execute Script page. As you enter a customer's answer to each scripted question, the system determines a score that is based on values set within that script. When you are finished administering the script, the system adds those scores and displays the total here.

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See Chapter 14, "Qualifying a Lead or Opportunity," Administering a Scripted Survey, page 176.

Rate Value Displays the rate value from the Execute Script page. Rate values are based on the total script scores. Examples include *Cold, Warm, Hot, Satisfied, Somewhat Satisfied,* and *Very Satisfied.*

If a rate value from the survey is not mapped to a lead rating, the user can interpret it and manually set the lead rating to the appropriate value. For example, you might map survey rate values to lead ratings such that only leads with a survey rating of either *Warm* or *Hot* are given a status of *Qualified.* When the survey rate value of a lead is *Very Satisfied,* the user can manually change the lead rating to *Hot* to change the status to *Qualified.*

Date Last Run Displays the date when the script was last run.

Script Status Displays the current status of the script with this contact. Values are *Completed, Processing,* and *Started.*

Delete You can delete a script row before running the script. However, you cannot delete the script or its results after it has been run.

Administering a Scripted Survey

Access the Execute Script page.

Note. The Execute Script page is part of both the Lead component and the Opportunity component. Although the following example shows the Lead component, the information applies to both leads and opportunities.

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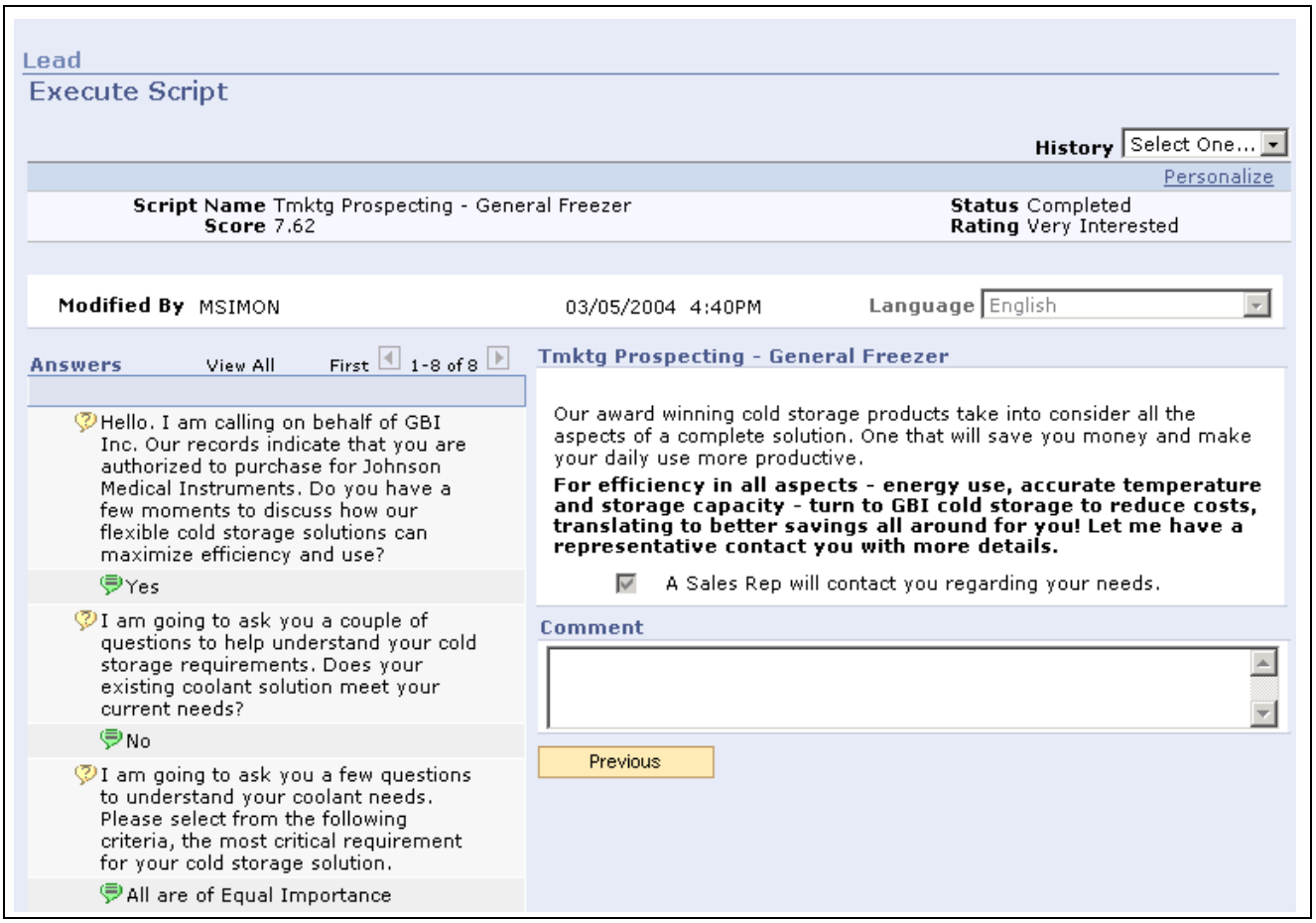

Execute Script page

Ask the scripted question, select the contact's response to the question, enter relevant comments, and then ask the next question. If the contact provides an answer that no longer promotes the sale of the product, the system displays a thank you message and ends the survey.

You can also enter and view script comments.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Running Scripts," Understanding Script Types and Script Actions.

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CHAPTER 15

Creating a Proposal for a Lead or Opportunity

This chapter provides an overview of proposals for a lead or opportunity and discusses how to:

- Select products and prices for a proposal.
- Generate quotes and orders.

Understanding Proposals for a Lead or Opportunity

After you have generated and qualified a lead or opportunity, you can create a proposal and send it to the potential customer. On the Propose page of the Lead component (RSF_LEAD_ENTRY) or the Opportunity component (RSF_OPPORTUNITY), you can add the specific products, quantities, and prices to include in the proposal. If you have licensed PeopleSoft Order Capture, you can create a quote that includes the information you entered on the Propose page. Then, you can put together a package of information to send to the potential customer. If the lead or opportunity becomes an actual sale and you have licensed Order Capture, you can create an order from the information entered on the Propose page.

See Chapter 18, "Sending Sales Email Messages and Correspondence," Sending a Proposal or Quote to a Customer, page 209.

Selecting Products and Prices for a Proposal

This section discusses how to select products and prices for a proposal.

Pages Used to Select Products and Prices for a Proposal

Page Name	Object Name	Navigation	Usage
Lead - Propose	RSF_LEAD_PROPOSE	Sales, Search Leads Select a lead, and select the Propose tab.	Select products and prices for a proposal for the lead.
Opportunity - Propose	RSF_OPP_PROPOSE	Sales, Search Opportunities. Select an opportunity, and select the Propose tab.	Select products and prices for a proposal for the opportunity.

Selecting Products and Prices for a Proposal

Access the Lead - Propose page or the Opportunity - Propose page.

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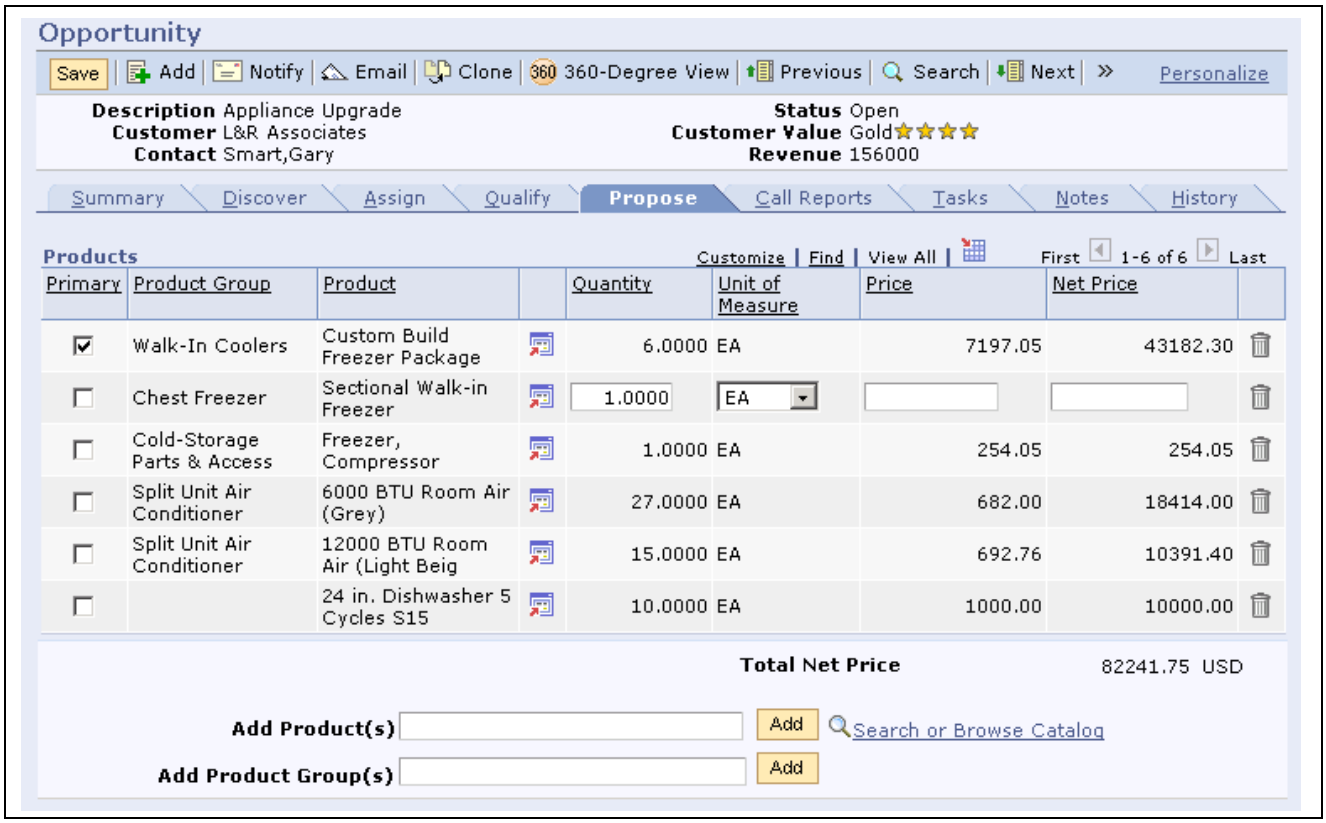
Note. The Products section appears on the Propose page in both the Lead component and the Opportunity component. Although the following example shows the Opportunity component, the information applies to both leads and opportunities unless otherwise indicated.



Opportunity - Propose page

Primary Select to identify a product as the customer's primary interest.

Product Group Displays the product group. If you add a product and a product group is associated with the product, the system populates this field.

Product If you add a product using the Add Product(s) field and the Add button, this field displays the product that you added. If you add a product group using the Add Product Group(s) field and the Add button, this field is editable, and you can search for a product that is associated with the product group.

Price Displays the price of each unit. Overriding the price here applies a price override only to the opportunity or lead.

When you enter a product, the system displays the product's unit of measure or default unit of measure. The system also displays the product's list price based on the combination of the product ID, currency code, and unit of measure. If you override the unit of measure and a price is calculated for the new unit that you enter, the system displays that price when you refresh the page. Price calculations or adjustments are performed by the PeopleSoft Enterprise Pricer.

Net Price Displays the price multiplied by the quantity. When you press the TAB key to exit this field, the system calculates and displays the new subtotal.

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Add Product(s) and **Add** — Enter a product and click Add to add the product to the list. You can also leave the text field blank and click Add to select a product from a list.

Add Product Group(s) and **Add** — Enter a product group and click Add to add the product group to the list. You can also leave the text field blank and click Add to select a product group from a list.

Search or Browse Catalogs — Click to access the online catalog to locate the product and view product details in the product catalog.

Note. All sales users can browse the catalog and add products to opportunities; however, you cannot add a product to an order unless you have licensed PeopleSoft Order Capture.

See Also

PeopleSoft Enterprise CRM Enterprise Pricer 9 PeopleBook, "PeopleSoft Enterprise Pricer for CRM Preface"

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook, "PeopleSoft Enterprise CRM Product and Item Management Preface"

Generating Quotes and Orders

This section discusses how to generate quotes and orders.

Pages Used to Generate Quotes and Orders

Page Name	Object Name	Navigation	Usage
Lead - Propose	RSF_LEAD_PROPOSE	Sales, Search Leads. Select a lead, and then select the Propose tab.	Generate quotes and orders for a lead.
Opportunity - Propose	RSF_OPP_PROPOSE	Sales, Search Opportunities. Select an opportunity, and then select the Propose tab.	Generate quotes and orders for an opportunity.

Generating Quotes and Orders

Access the Lead - Propose page or the Opportunity - Propose page.

Note. The Quotes and Orders section appears on the Propose page in both the Lead component and the Opportunity component. Although the following example shows the Lead component, the information applies to both leads and opportunities.

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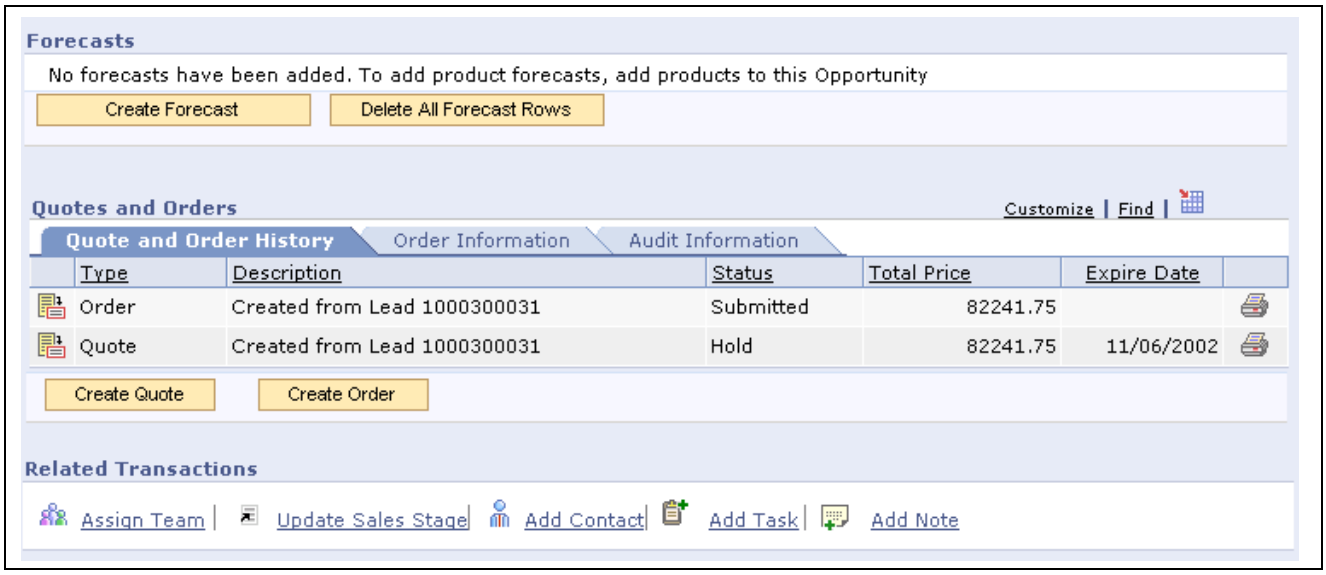

Lead - Propose page

Create Quote and **Create Order**

Click to create a quote or order with the products displayed in the products grid. The system transfers the user to the Order Capture quote or order component.

If the lead or opportunity is associated with a marketing campaign and the product selected is in that campaign's marketing offer, the system copies the promotion code to the Order Capture pages for that product.

These buttons are available only if you are licensed and integrated with PeopleSoft Order Capture.

Note. You must designate a third-party tax vendor (such as Taxware, Vertex, or WorldTax) on the Order Capture Business Unit Definition page for taxes to be calculated as part of the quote or order. If you don't specify a tax vendor, no tax calculations are included.

See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, "Defining Order Capture Business Units".

Quote and Order History

This tab shows the status, total price, and expiration date of the requests for quotes and orders that are submitted from the Products section of the Propose page.

Click the View Quote Details button to access the Quote component to review or edit this quote's details.

Click the Create Sales Order button to create a sales order from a quote. You can use this button only if the expiration date for the quote is later than the current date.

Click the Print button to access the Correspondence Request page, where you can compose and send an email message containing a quote for a customer.

See Chapter 18, "Sending Sales Email Messages and Correspondence," Sending a Proposal or Quote to a Customer, page 209.

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Order Information

Select the Order information tab.

View the order ID and quote ID.

Audit

Select the Audit tab.

Review this information to determine who created or modified quotes and orders and to see when the changes occurred.

Related Transactions

Use this toolbar to quickly access other pages that update information for the lead.

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CHAPTER 16

Creating Sales Tasks and Adding Notes for a Lead or Opportunity

This chapter provides an overview of sales tasks and discusses how to:

- Create and assign sales tasks.
- View and manage tasks.
- Add notes and attachments.

Understanding Sales Tasks

A task is any day-to-day activity, such as a meeting or a conference call, that you add to your calendar. You use tasks in many PeopleSoft Enterprise Customer Relationship Management (PeopleSoft CRM) applications.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Working with Tasks".

A sales task is any day-to-day activity associated with managing a lead or an opportunity. Sales tasks might include making sales calls, attending meetings, or following up on prospects. You can use functionality in the Lead component (RSF_LEAD_ENTRY) and the Opportunity component (RSF_OPPORTUNITY) to manage sales tasks.

Creating and Assigning Sales Tasks

This section discusses how to create and assign sales tasks.

Pages Used to Create and Assign Sales Tasks

Page Name	Object Name	Navigation	Usage
Lead - Tasks	RB_TSK_EDIT_GRID	Sales, Search Leads. Select a lead, and select the Tasks tab.	Create and track sales tasks to follow up on a lead, close a sale, or convert a lead to an opportunity.
Opportunity - Tasks	RB_TSK_EDIT_GRID	Sales, Search Opportunities. Select an opportunity, and select the Tasks tab.	Create and track sales tasks that are needed to follow up on an opportunity and close the sale.

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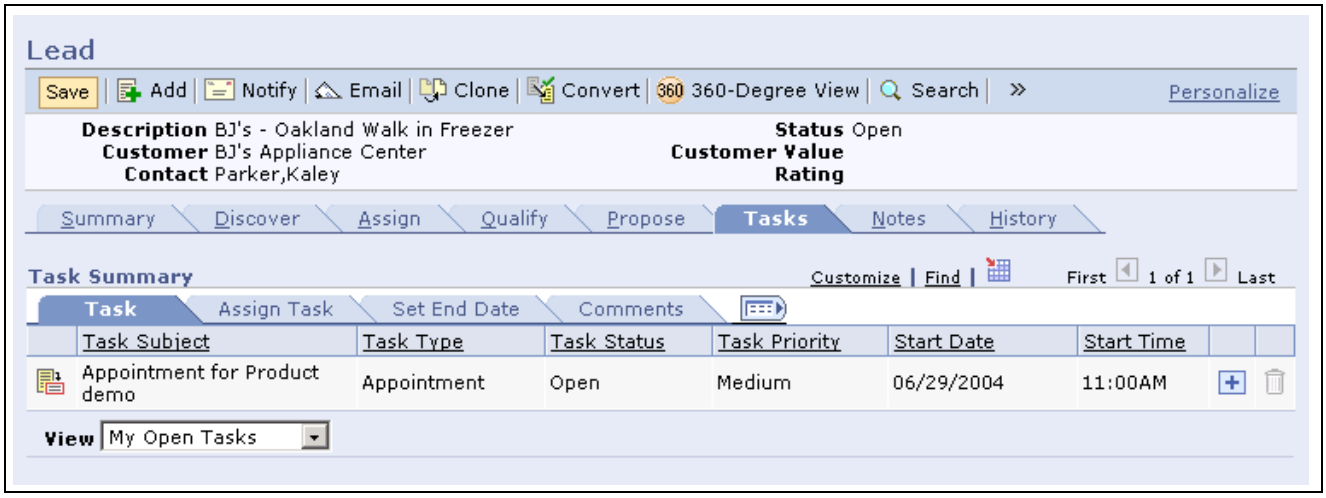
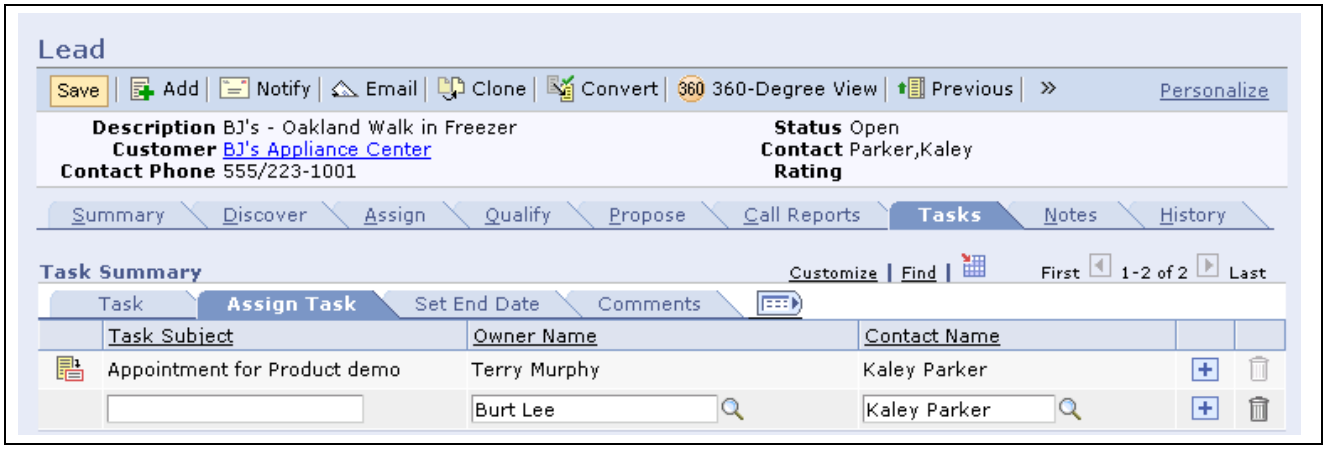
Creating and Assigning Sales Tasks

Access the Lead - Tasks page or the Opportunity - Tasks page.

Note. The Tasks page appears in both the Lead component and the Opportunity component. While the following example shows the Lead component, the information applies to both leads and opportunities unless otherwise indicated.



Lead - Tasks page: Task tab



Lead - Tasks page: Assign Task tab

Identify each task that is required to manage the lead or opportunity and close the sale. When you identify tasks and save the page, the system saves the task to the calendar and to the task list.

	Click the Task Details button to access the Task Details page and enter or view detailed information about the task.
Task Subject	Enter a description of the task.
Task Type	Select a task type. Set up task types on the Tasks Type page under Common Definitions, Task Management.
Task Status	Select the task status. Values are *Cancelled, Completed, In Process,* and *Open.*
Task Priority	Select the task priority. Values are *High, Medium,* and *Low.*

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Start Date Enter a start date for the task.

Start Time Enter a start time for the task.

View Filter the tasks that appear in the Task Summary list. Values are *All My Tasks, My Closed Tasks,* and *My Open Tasks*. The default is *My Open Tasks*.

Assign Task

Task Subject Enter a description of the task.

Owner Name Enter the user to whom the task is assigned.

Contact Name Enter the name of the contact person for the task.

Set End Date

End Date and **End Time** Enter the date and time when you expect to complete the task.

Comments

Enter comments describing the task.

Managing and Viewing Tasks

This section discusses how to:

- Manage and view tasks.
- Associate a task with a lead or opportunity.

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Pages Used to Manage and View Tasks

Page Name	Object Name	Navigation	Usage
Task Details	RB_TSK	• Sales, Search Leads or Sales, Search Opportunities Select a lead or opportunity, select the Tasks tab, and then click the Task Details icon next to the task that you want to view or edit. • Click the Add Calendar Entry button in the My Calendar component. • Click the Add Task button on the My Tasks page.	View task details.
Transactions for the Task	RB_TSK_TXNS	On the Task Details page, click the View or Link Transactions link.	Associate a task with a lead or opportunity.
My Tasks	RB_TSK_MY_TASKS	My Tasks	Manage and view tasks.
Monthly Calendar	RB_TSK_CALENDAR	My Calendar	View tasks in calendar format.

Managing and Viewing Tasks

You can view tasks in several ways:

- Access the Lead - Tasks page or the Opportunity - Tasks page for a specific lead or opportunity.
- Click the Task Details icon next to a task on the Lead - Tasks page or the Opportunity - Tasks page to access the Task Details page, where you can view or edit details for the task.
- View the calendar to determine the tasks that are due to begin on various dates, and click a task to access the corresponding Tasks page.

  See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Using Calendars”.
- Access the My Tasks page for a list of tasks.

Access the Task Details page.

Note. When you enter and save a task on the Lead - Tasks page or the Opportunities - Tasks page, the system associates the task with a lead or opportunity and writes that task to the calendar (if applicable for the selected task type). However, when you enter a task directly into the My Calendar component or the My Tasks component, the system does not associate it with a lead or opportunity. You must click the View or Link Transactions link on the Task Details page to associate the task with a lead or opportunity.

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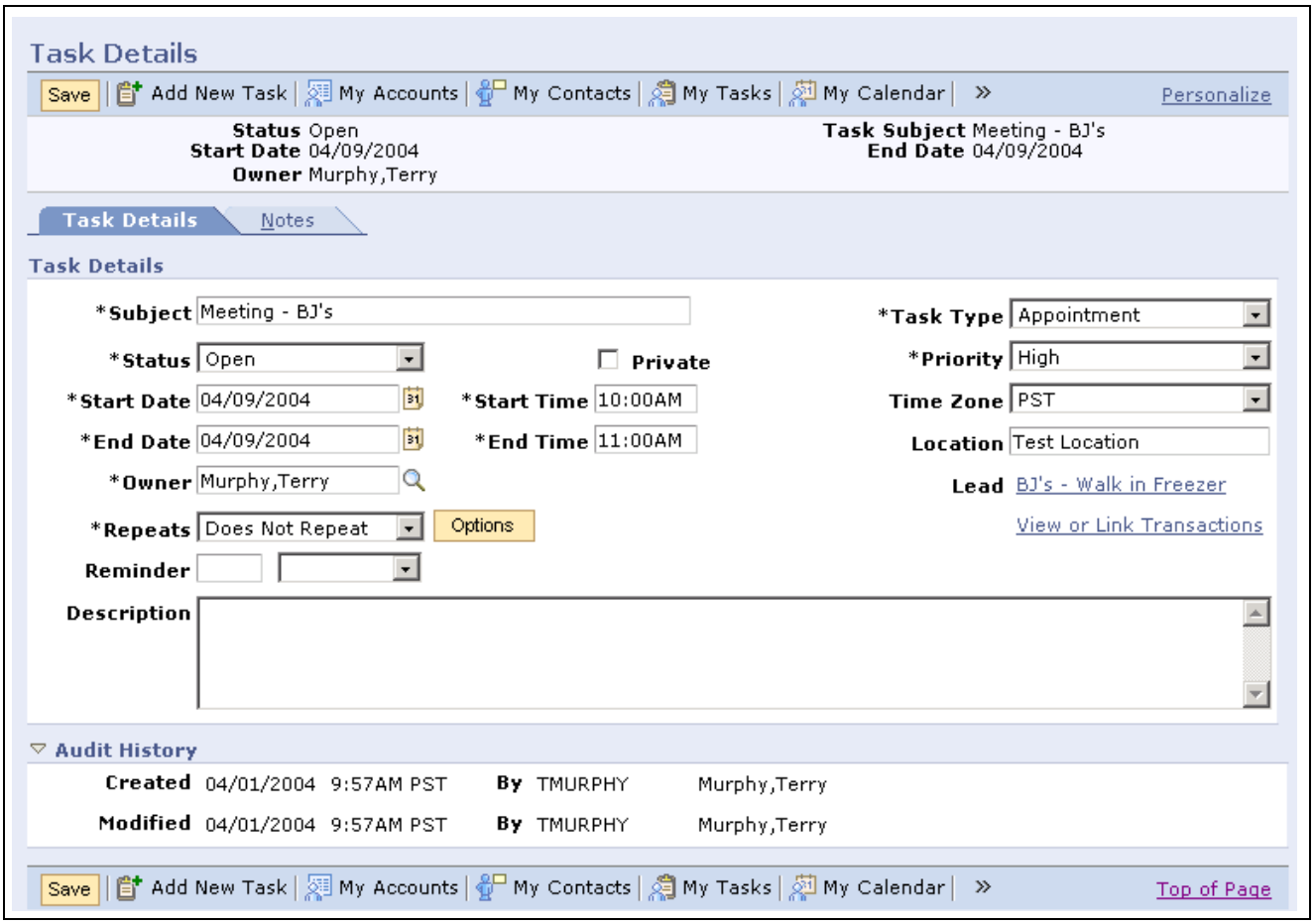


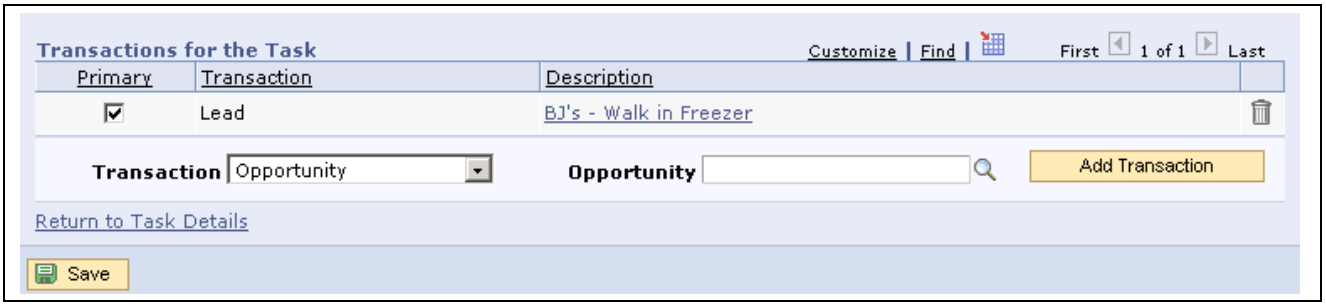
Task Details page

Lead and **Opportunity** The systems displays a link to the lead or opportunity with which the task is associated. Click the link to view the lead or opportunity.

View or Link Transactions Click this link to access the Transactions for the Task page, where you can associate the task with a lead or opportunity.

Associating a Task with a Lead or Opportunity

Access the Transactions for the Task page.



Transactions for the Task page

Primary Select this check box to indicate the primary transaction to which the task belongs. A task can be associated with multiple transactions. In that case, one transaction must be designated as the primary transaction for the task.

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Transaction	Select *Lead* or *Opportunity* to link the task with a lead or opportunity.
Lead or **Opportunity**	The system displays one of these fields after you make a selection in the Transaction field. Select a lead or opportunity with which the task is associated.
Add Transaction	Click this button to associate the task with the lead or opportunity that you selected.

Adding Notes and Attachments

This section discusses how to enter and view notes and attachments.

Pages Used to Add Notes and Attachments

Page Name	Object Name	Navigation	Usage
Lead - Notes	RSF_LEAD_NOTES	Sales, Search Leads Select a lead, and then select the Notes tab.	Enter notes and attachments related to the lead.
Opportunity - Notes	RSF_OPP_NOTES	Sales, Search Opportunities Select an opportunity, and then select the Notes tab.	Enter notes and attachments related to the opportunity.

Entering and Viewing Notes and Attachments

Access the Lead - Notes page or the Opportunity - Notes page.

Note. The History page appears in both the Lead component and the Opportunity component. Although the following example shows the Opportunity component, the information applies to both leads and opportunities.

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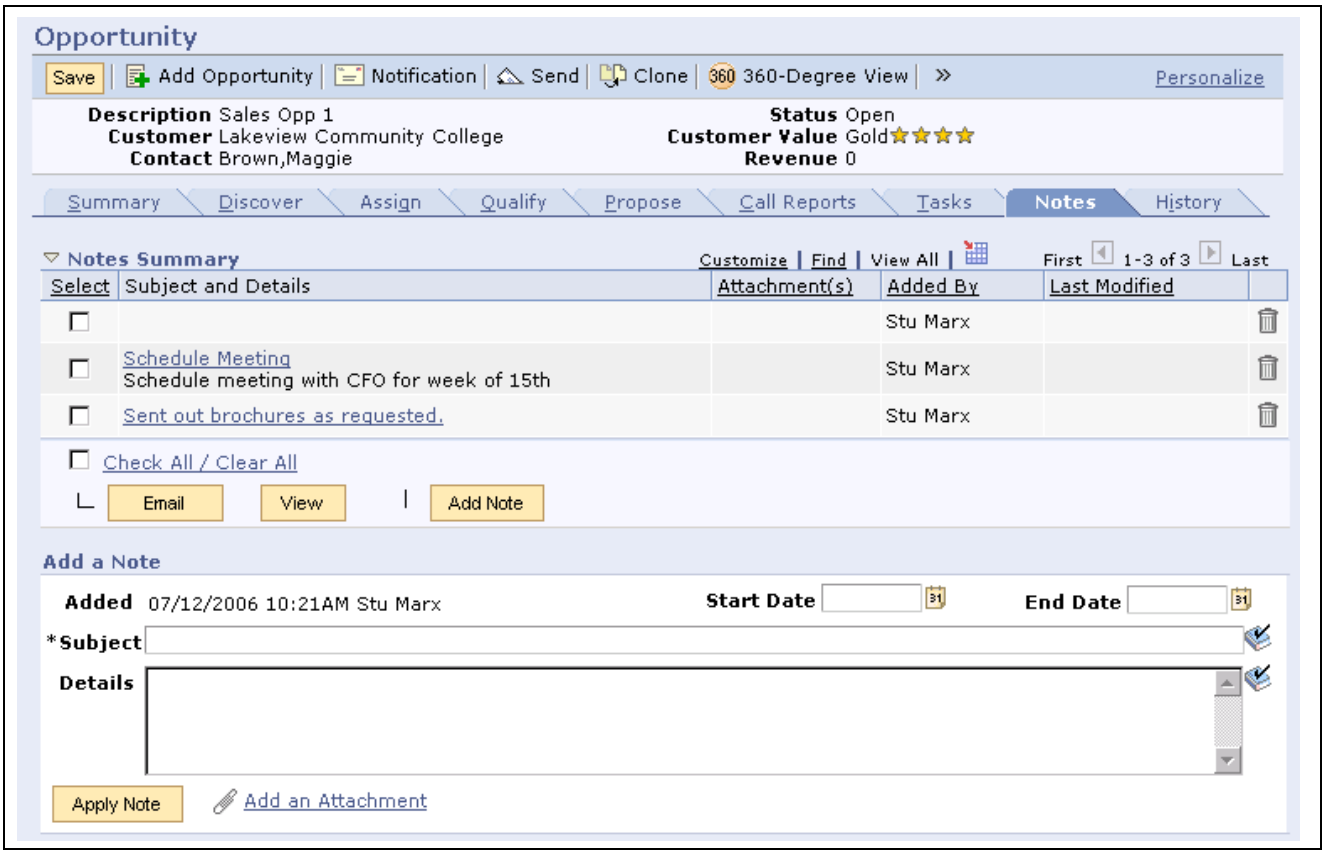

Opportunity - Notes page

Select	Select this check box to indicate that you want to send the note to the customer by email or to view the entire note.
Subject	Click to display the Note Details section at the bottom of the page.
Email	Click this button to access the Outbound Email page, where you can send an email message with notes and attachments to the customer.
View	Click to view the entire note.
Add Note	Click to display the Add a Note section at the bottom of the page.
Apply Note	Click to add the note to the Notes Summary section of the page.
Add an Attachment	Click this link to add an attachment to the lead or opportunity.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Notes and Attachments”.

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CHAPTER 17

Managing Leads and Opportunities

This chapter discusses how to:

- Search for leads and opportunities.
- Manage leads and opportunities on the search page.
- Manage a lead or opportunity by using the summary.
- View history.

Searching for Leads and Opportunities

This section discusses how to search for existing leads and opportunities.

Pages Used to Search for Leads and Opportunities

Page Name	Object Name	Navigation	Usage
Search Leads	RSF_LEADS_HOME_GRD	Sales, Search Leads	Search for leads.
Search Opportunities	RSF_OPP_HOMEPAGE	Sales, Search Opportunities	Search for opportunities.

Searching for Leads and Opportunities

Access the Search Leads page or the Search Opportunities page.

Note. The search pages for leads and opportunities are similar. Although the following example shows the Lead component, the information applies to both leads and opportunities.

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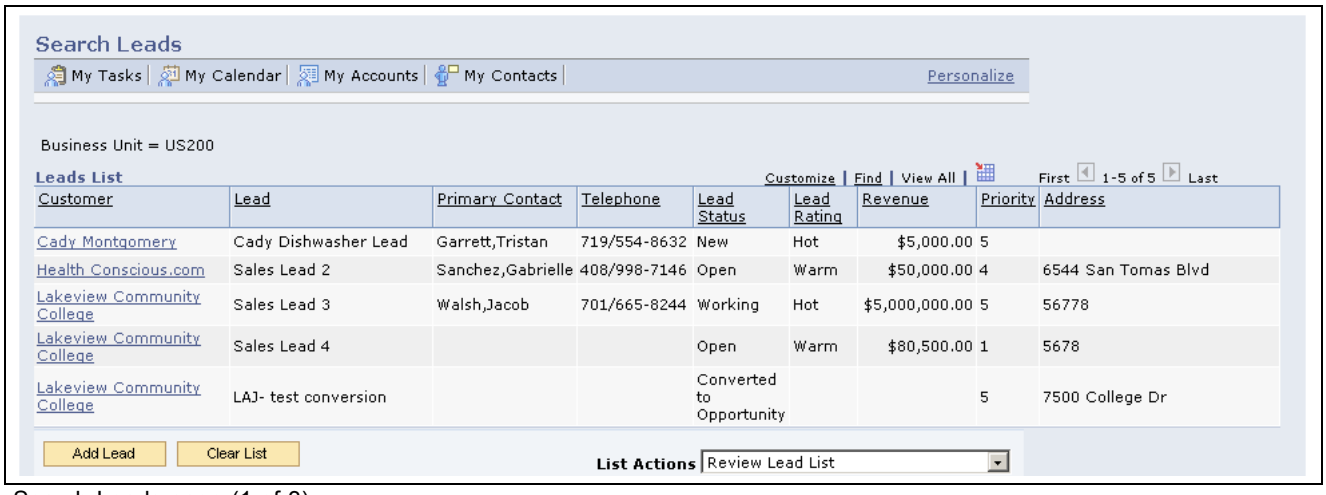
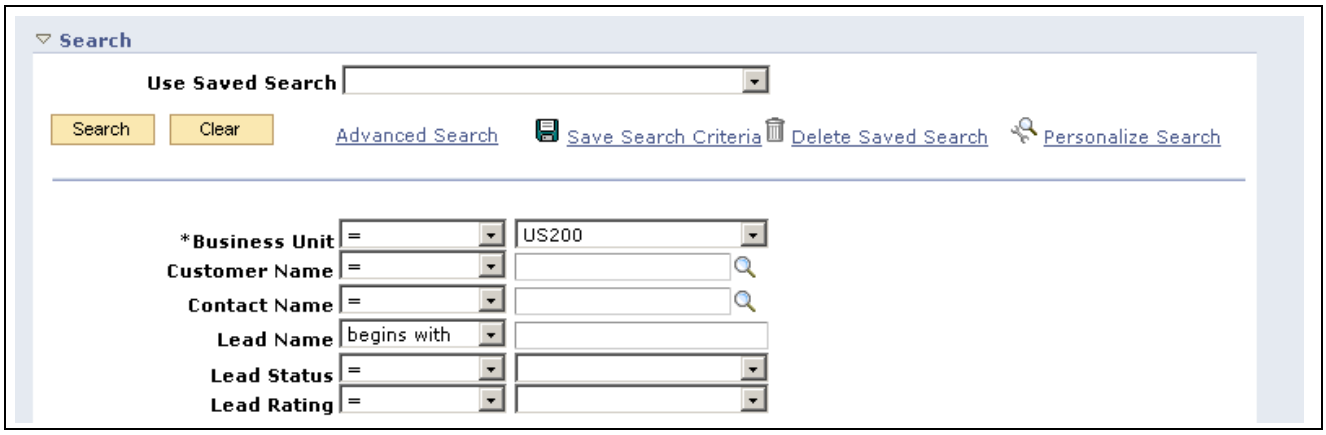


Search Leads page (1 of 3)



Search Leads page (2 of 3)

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Search Leads page (3 of 3)

Prospects as well as CDM customers are listed in the search results.

Important! The fields that appear in the results grid are determined by the List Action that you select and not by the configurable search pages.

Appears when the Convert Lead to Opportunity business process is running for the listed lead.

See Appendix B, "Sales Delivered Business Processes and Web Services," page 271.

List Actions

Select an action that you will perform using the list. The fields that appear in the list change to reflect the action you select. For example, you can change priorities, change the sales representative assignment, and reject or accept leads on the search page.

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Show in Results

Select the following check boxes to specify the leads or opportunities that appear when you perform a search.

Note. The search fields that are available in the Search section and the check boxes that are available in the Show in Results section depend on how you configure the search pages for leads and opportunities.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Configuring Search Pages".

Leads as Added by User	Select to display leads that you added.
Leads as Cust Account Owner (leads as customer account owner)	Select to display leads for customers whose accounts you own.
Leads as Cust Account Member (leads as customer account member)	Select to display leads for customers on whose accounts you are a team member.
Leads as Manager	Select to display leads that are assigned to a sales representative that you manage. The territory tree determines the sales representatives that you manage.
Leads by Partner Manager	Select to display leads associated with a specific partner manager.
Leads as Owner	Select to display leads for which you are the primary sales representative.
Leads as Partner Account Owner	Select to display leads that have a partner whose account you own.
Leads as Partner Acct Member (leads as partner account member)	Select to display leads that have a partner on whose account you are a team member.
Leads as Site Account Owner	Select to display leads that are for a site for which you are the account owner.
Leads as Site Account Member	Select to display leads that are for a site for which you are an account member.
Leads as Task Owner	Select to display leads that have a task that is assigned to you.
New Leads as Owner	Select to display new leads for which you are the primary sales representative.
My New Leads Since Last Viewed	Select to display new leads that have been added since the last time you viewed the search page.
Leads as Parent Account Team	Select to display leads for specific customers for which you are a member of the parent account team.
Leads as Team Member	Select to display leads for which you are a team member.
Leads as Team Member Manager	Select to display leads for which you are the team member manager.
Unassigned Leads	Select to display unassigned leads.

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Unassigned Leads by Bus Unit (unassigned leads by business unit) Select to display unassigned leads sorted by business unit.

Managing Leads and Opportunities on the Search Page

This section discusses how to:

- Prioritize leads and opportunities.
- Change the sales representative assignment.
- Reject or accept leads.
- Update the forecast for opportunities.
- Update the sales stage for opportunities.

Note. The search pages for leads and opportunities are similar. Although the following example shows the Lead component, the information applies to both leads and opportunities.

Pages Used to Manage Leads and Opportunities

Page Name	Object Name	Navigation	Usage
Search Leads	RSF_LEADS_HOME_GRD	Sales, Search Leads	Manage leads.
Search Opportunities	RSF_OPP_HOMEPAGE	Sales, Search Opportunities	Manage opportunities.

Prioritizing Leads and Opportunities

Access the Search Leads page or the Search Opportunities page.

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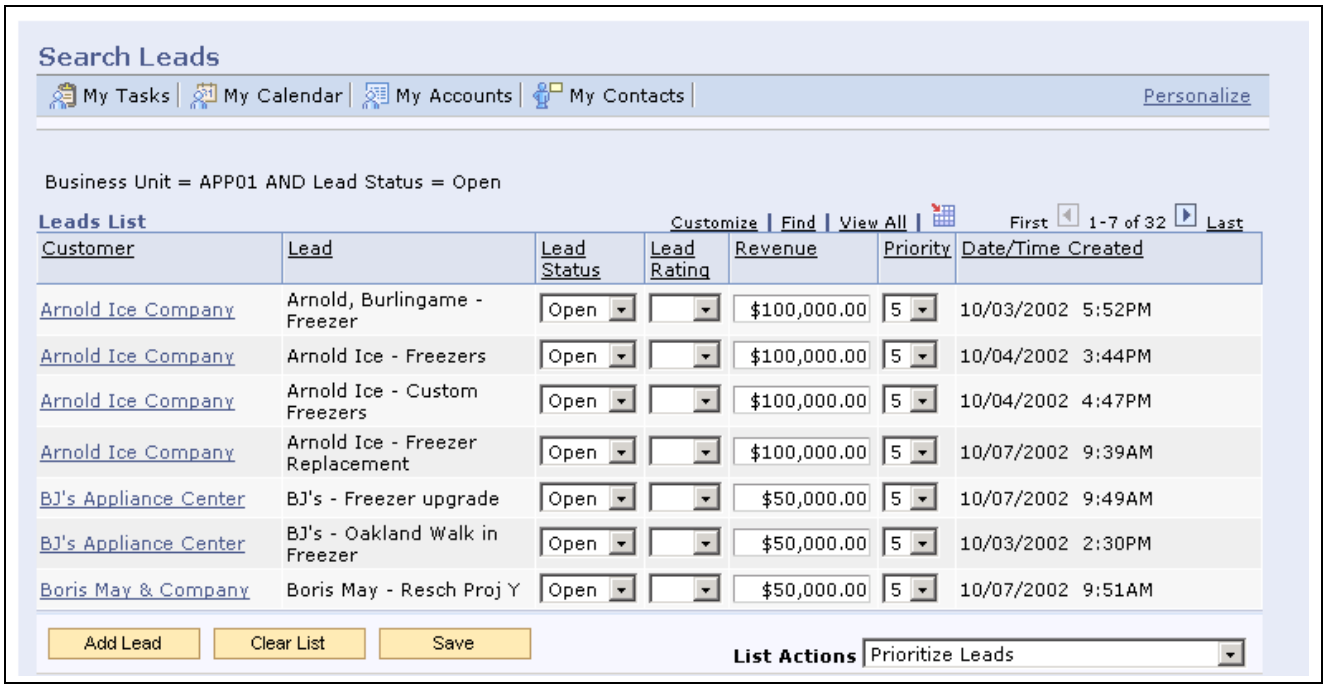

Search Leads page

Select *Prioritize Leads* in the List Actions field.

Lead Rating Indicates the degree—*Hot, Warm,* or *Cold*—of the customer's interest or the potential for making a sale.

Define rating values on the Lead Ratings page.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Lead Ratings, page 38.

Revenue Enter the revenue for the lead.

Priority Select a priority to indicate the urgency of handling this opportunity. Priority values are translate values.

Note. If the lead has been converted to an opportunity, you cannot change the rating, revenue, or priority for the lead.

Changing the Sales Representative Assignment

Access the Search Leads page or the Search Opportunities page.

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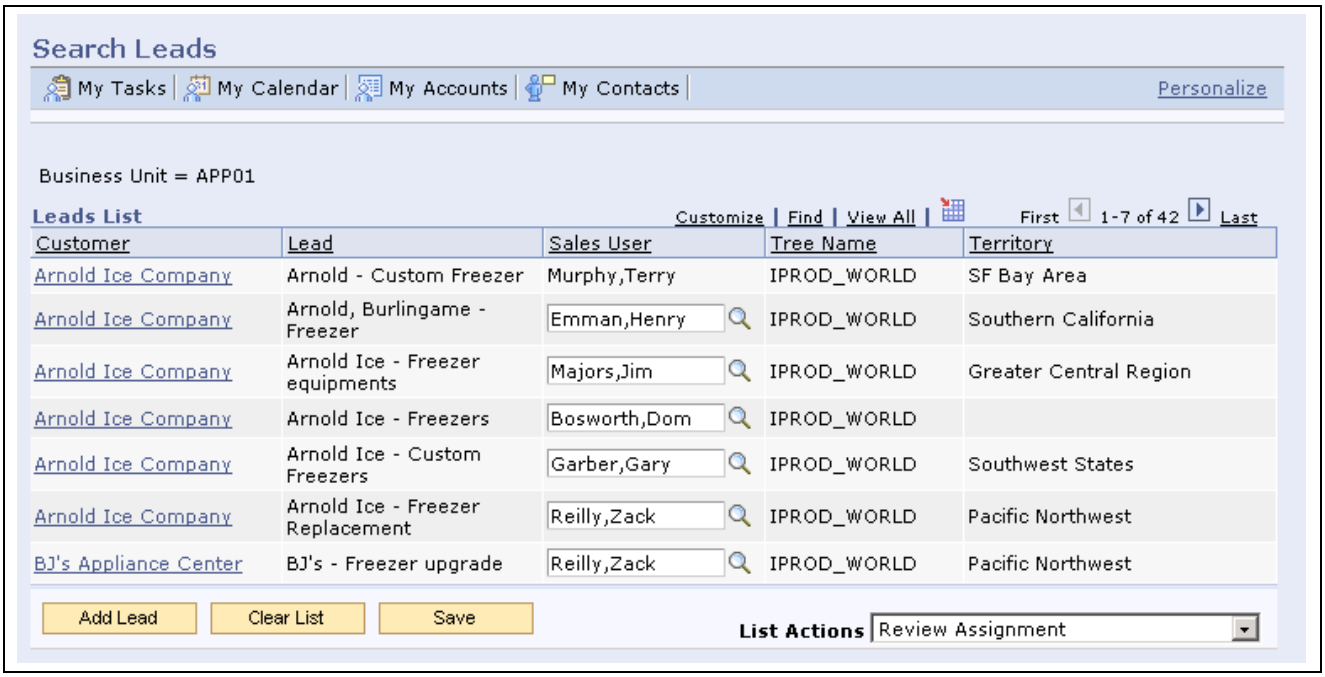


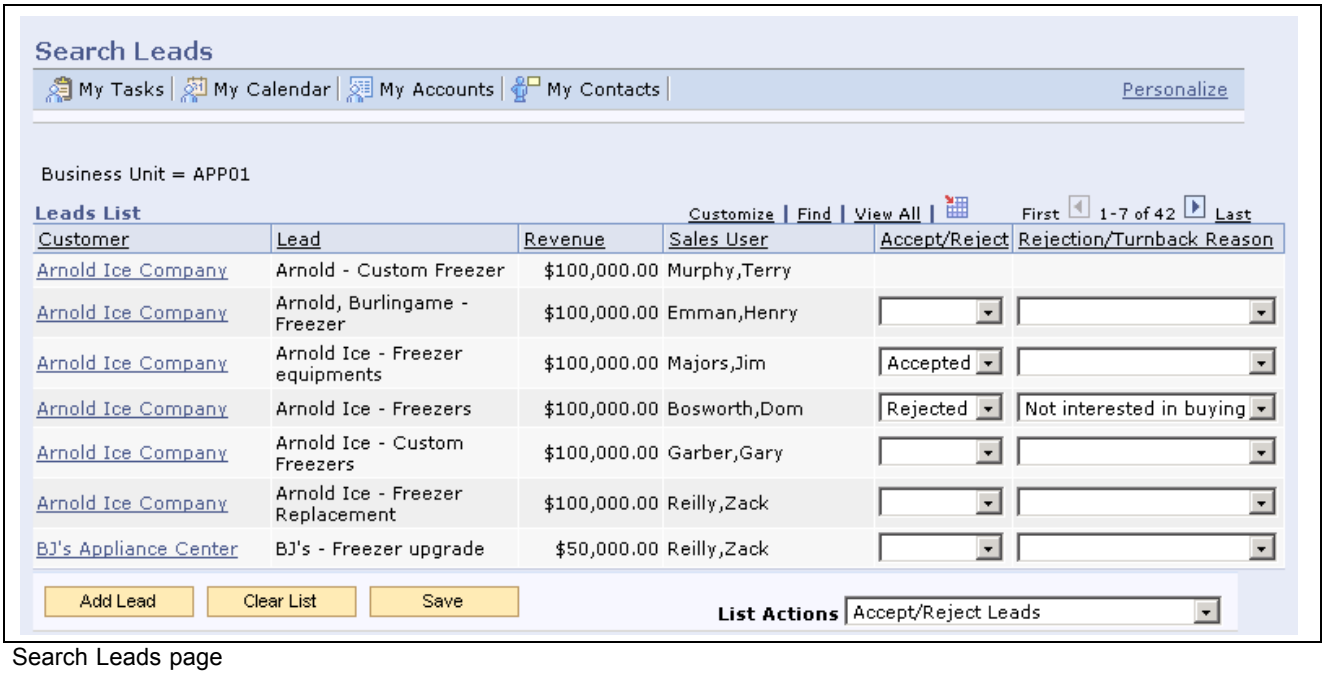
Search Leads page

Select *Review Assignment* in the List Actions field.

To change the sales representative, select a different person in the Sales User field.

Rejecting or Accepting Leads

Access the Search Leads page.



Search Leads page

Select *Accept/Reject Leads* in the List Actions field.

Accept/Reject Select whether to accept the lead. Values are *Accepted, Rejected* and *Turnback*.

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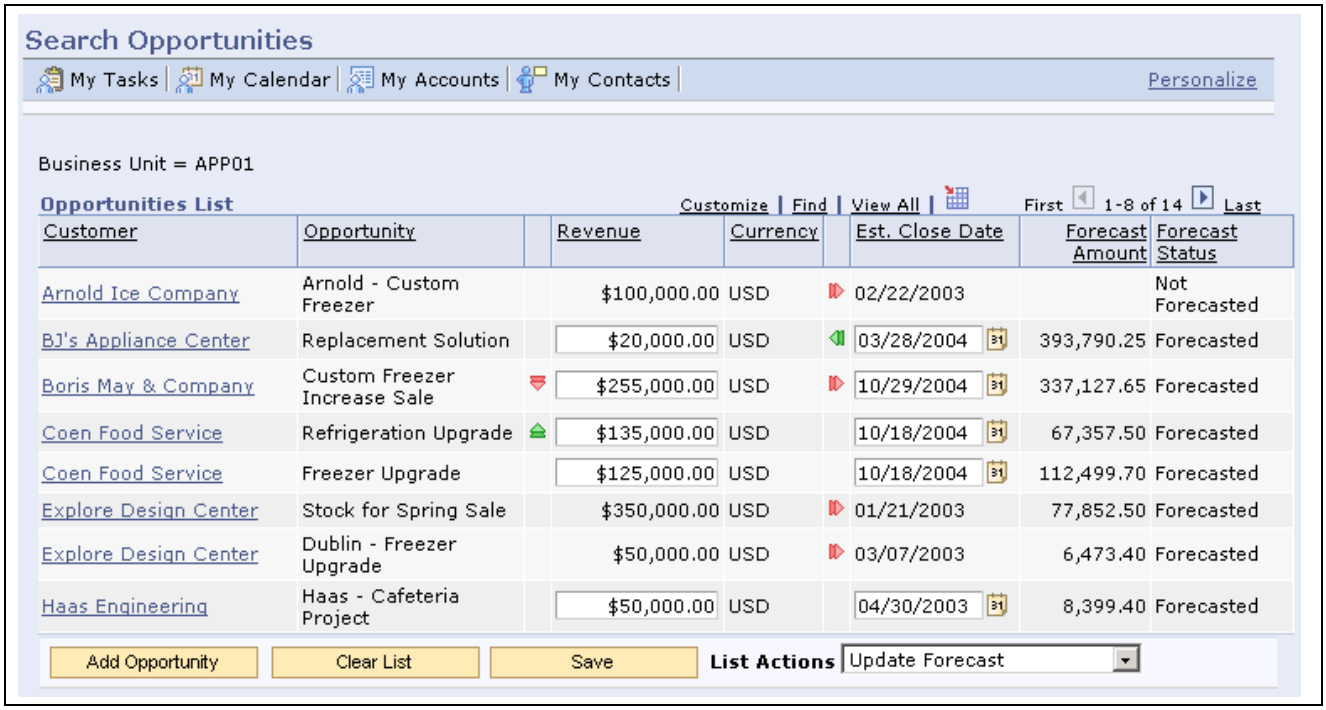
Rejection/Turnback Reason Select a reason for rejecting or turning back the lead.

Updating the Forecast for Opportunities

Access the Search Opportunities page.



Search Opportunities page

Select *Update Forecast* in the List Actions field.

Revenue Enter the amount of revenue that is anticipated from the sale.

The system displays arrows in the column to the left of the Revenue column. An upward-pointing green arrow signifies that the revenue has increased, and a downward-pointing red arrow signifies that the revenue has decreased.

Est. Close Date (estimated close date) Enter a date that the system uses to determine whether to include the opportunity in the pipeline or forecast based on the time period that is specified for that pipeline or forecast.

The system displays arrows in the column to the left of the Est. Close Date column. A right-pointing green arrow signifies that the estimated close date has changed to an earlier date, and a left-pointing red arrow signifies that the estimated close date has changed to a later date.

Forecast Amount If you have created a forecast for the opportunity, the system displays the forecast amount.

Updating the Sales Stage for Opportunities

Access the Search Opportunities page.

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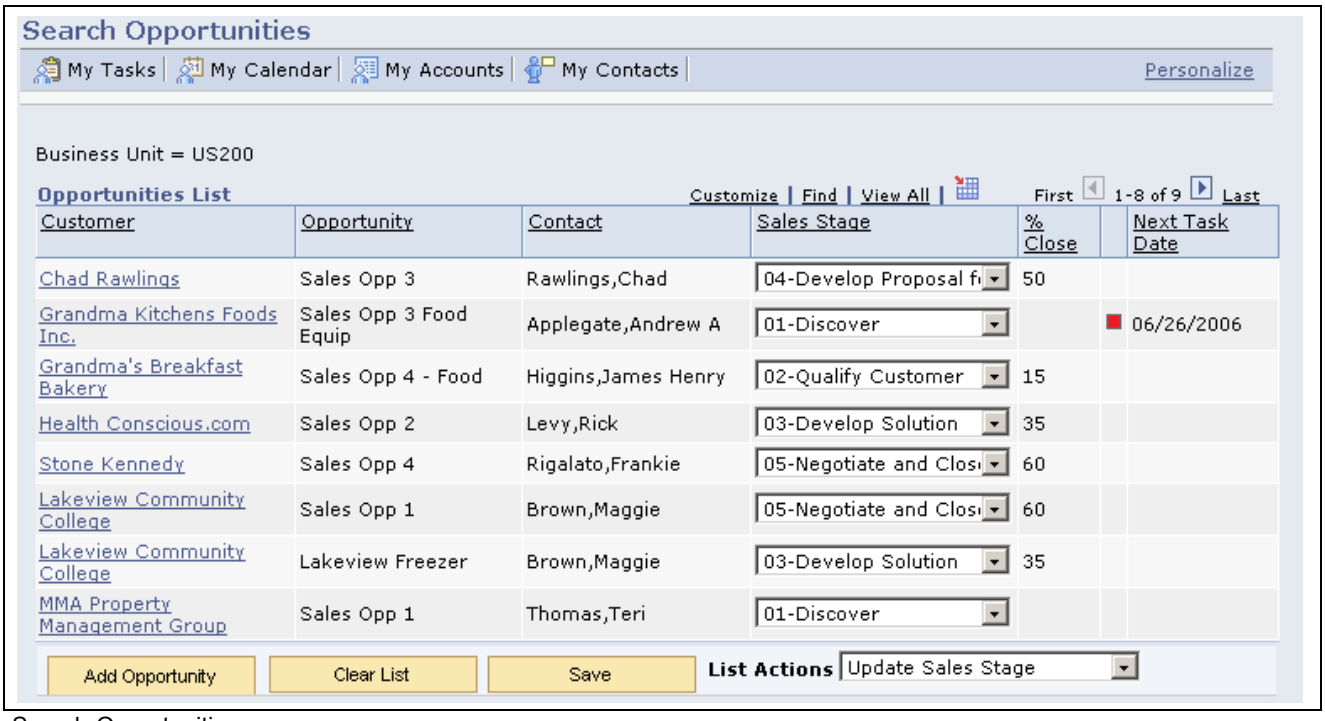

Search Opportunities page

Select *Update Sales Stage* in the List Actions field.

Sales Stage Select the current stage of the sales process for the opportunity. The system populates this drop-down list box with values that are based on the specified sales process.

Set up sales stages on the Sales Process page.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up a Sales Process, page 31.

Managing a Lead or Opportunity by Using Summary Information

This section provides an overview of the Summary page in the Lead and Opportunity components and discusses how to manage a lead or opportunity on the Summary page.

Understanding the Summary Page in the Lead and Opportunity Components

The Summary page in the Lead component and the Opportunity component enables sales representative and managers to view high-level information for a lead or opportunity. The Summary page displays the sales stage, forecast (for opportunities), contacts, tasks, notes, sales team, products, call reports, and quotes. In addition, the page displays links that you can click to access a page with detailed information for the particular type of data that you want to access.

You can configure the Summary page to meet your particular needs.

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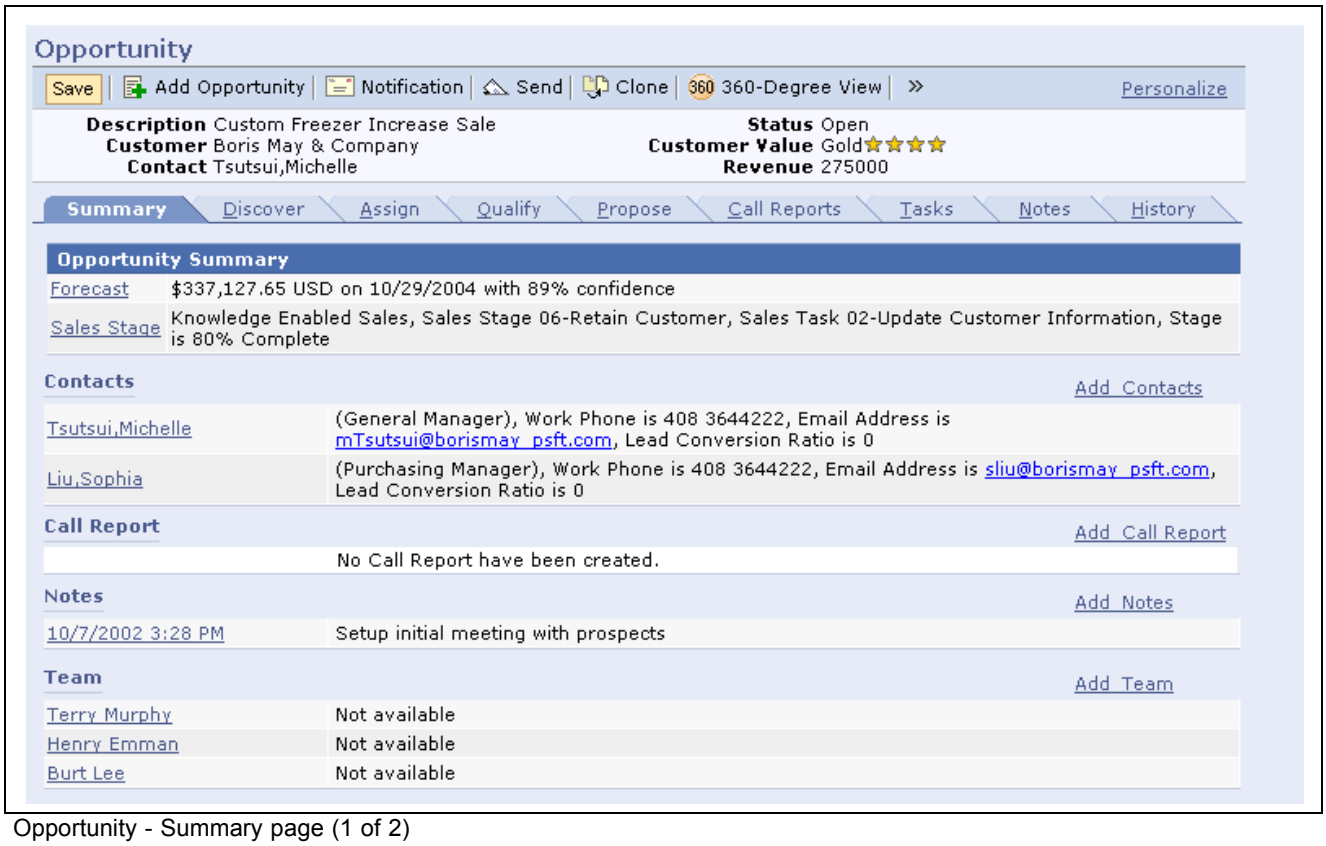
See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up the Summary Page for Leads and Opportunities, page 63.

Pages Used to Manage a Lead or Opportunity by Using Summary Information

Page Name	Object Name	Navigation	Usage
Lead - Summary	RSF_LEAD_SUMMARY	Sales, Search Leads Select a lead. On the Lead component, select the Summary tab.	Manage a lead.
Opportunity - Summary	RSF_OPP_SUMMARY	Sales, Search Opportunities Select an opportunity. On the Opportunity component, select the Summary tab.	Manage an opportunity.

Managing a Lead or Opportunity on the Summary Page

Access the Lead - Summary page or the Opportunity - Summary page.



Opportunity - Summary page (1 of 2)

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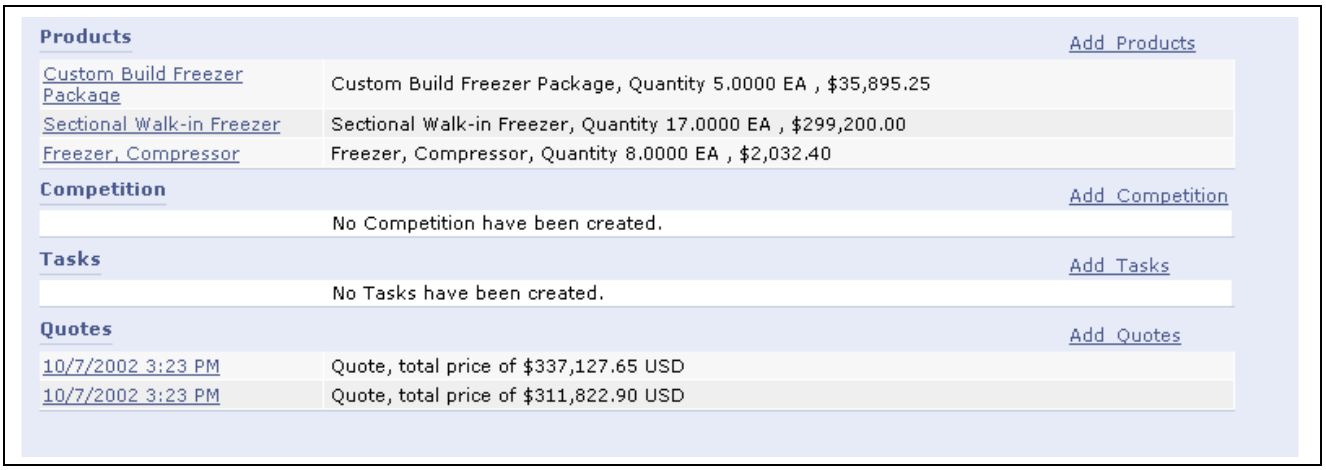

Opportunity - Summary page (2 of 2)

The Summary page appears in both the Lead and the Opportunity components. As delivered, the page contents differ slightly between the two components. You can modify the page contents in the Summary Page Setup component. Both prospects and CDM customers and contacts are displayed on the Summary page.

Summary Information

This information appears on both the Lead Summary and the Opportunity Summary.

Contacts Click the link for an existing contact or click the Add Contacts link to access the Contact section of the Discover page.

Call Report Click the link to an existing call report or click the Add Call Report link to access the Call Reports page.

Notes Click the date-time link for an existing note or click the Add Notes link to access the Notes page.

Team Click the link for an existing team member or click the Add Team link to access the Assign page.

Note. As delivered, this section appears on the Opportunity Summary only.

Products Click the date-time link for an existing product or click the Add Products link to access the Propose page.

Competition Click the link for an existing competitor or click the Add Competition link to access the Qualify page, where you can add competitors.

Tasks Click the date-time link for an existing task or click the Add Tasks link to access the Qualify page, where you can add tasks.

Quotes Click the date-time link for an existing quote or click the Add Tasks link to access the Tasks page.

Note. As delivered, this section appears on the Opportunity Summary only.

Opportunity Summary

Forecast Click to access the Forecast Summary section of the Discover page.

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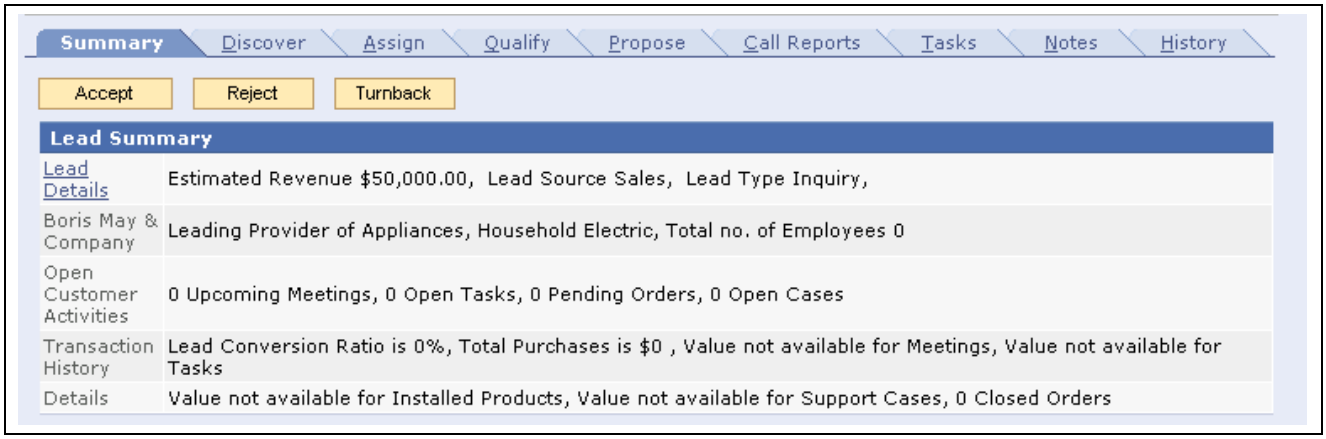
Sales Stage Click to access the Sales Stage section of the Discover page.

Lead Summary

This information appears on the Lead Summary,



Lead Summary page

Lead Details Click to access the Details section of the Discover page.

Click the customer name to access the Customer section of the Discover page.

If the lead source is *Marketing* or *Telemarketing* and the lead status is *Now* or *Open*, this information appears:

- Marketing Activity

  Click this link to access the Campaign section of the Qualify page. From the Qualify page, you can view details of the Marketing activity that is associated with the lead. You can view marketing activity even if the Activity End Date is past, as long as the End Response Date is greater than today's date.

- Call to Action
- Offer Description

See Also

Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up the Summary Page for Leads and Opportunities, page 63

Viewing Call Reports for a Lead or Opportunity

This section discusses how to view call reports.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Working with Call Reports," Understanding Call Reports

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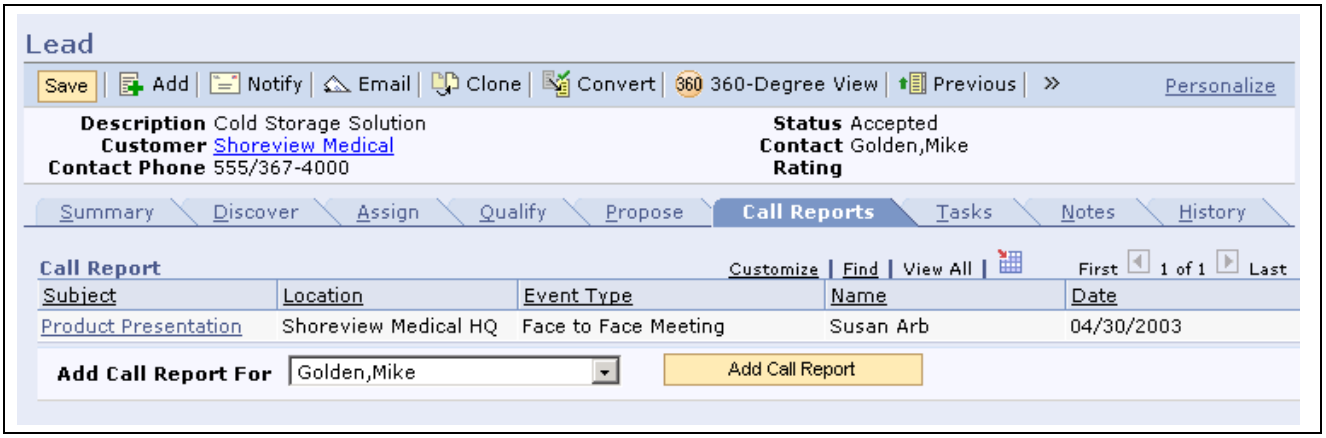
Pages Used to View Call Reports for a Lead or Opportunity

Page Name	Object Name	Navigation	Usage
Call Reports	RSF_CALL_RPTS	• Sales, Search Leads Select a lead and select the Call Reports tab. • Sales, Search Opportunities Select an opportunity and select the Call Reports tab.	View and add call reports for a lead or opportunity.

Viewing Call Reports

Access the Lead - Call Reports page or the Opportunity - Call Reports page.



Lead - Call Reports page

Click the link for an existing call report or select a person from the Add Call Report list and click the Add Call Report button. Only persons who are assigned to the lead or opportunity are available for selection.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Working with Call Reports"

Viewing History for a Lead or Opportunity

This section discusses how to view the history for a lead or opportunity.

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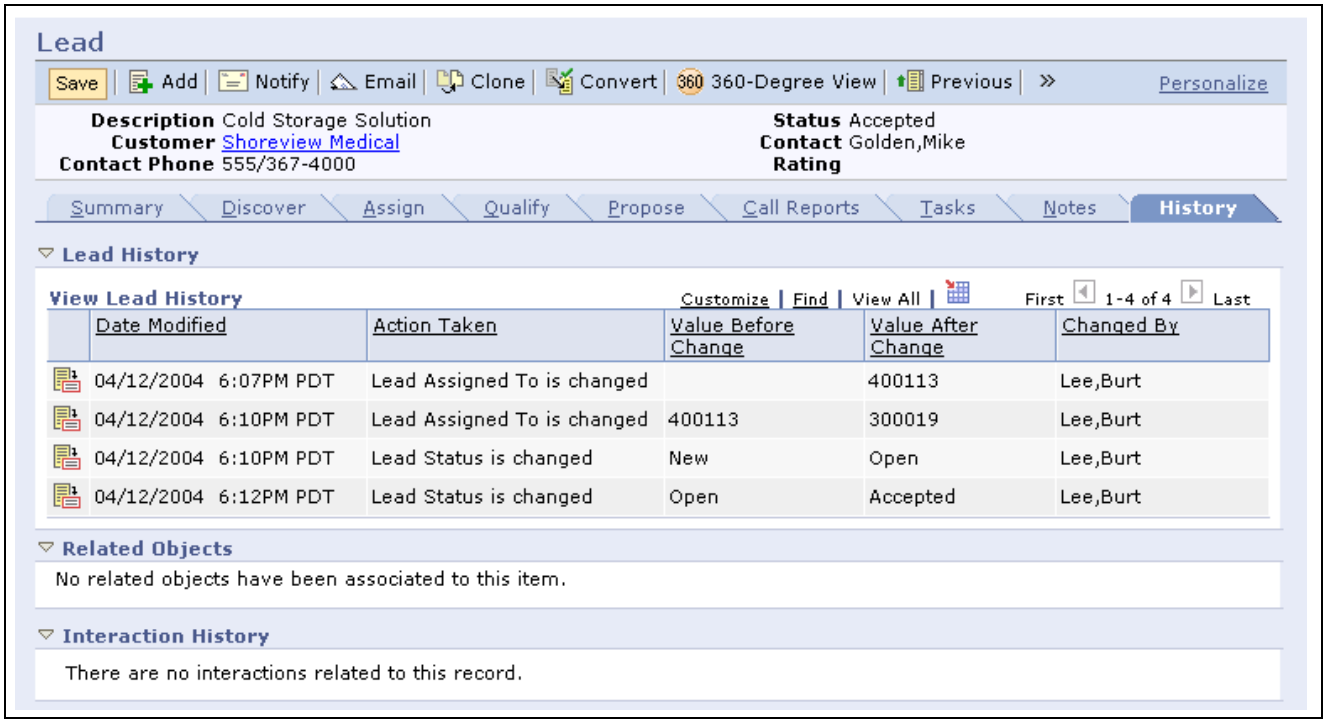
Pages Used to View History for a Lead or Opportunity

Page Name	Object Name	Navigation	Usage
Lead - History	RSF_LE_HISTORY	Sales, Search Leads Select a lead, and select the History tab.	View a history of system actions regarding a lead.
Opportunity - History	RSF_OPP_HISTORY	Sales, Search Opportunities Select an opportunity, and select the History tab.	View a history of system actions regarding an opportunity.

Viewing History

Access the Lead - History page or the Opportunity - History page.

Note. The History page appears in both the Lead component and the Opportunity component. Although the following example shows the Lead component, the information applies to both leads and opportunities.



Lead - History page

In the Related Objects section, you can view the associated opportunity if the lead was converted to an opportunity or the cloned object if the lead was cloned.

In the Interaction History section, you can view information about interactions (such as email messages or other correspondence) related to the lead or opportunity.

<Lead / Opportunity> History

The history of changes, such as status changes, that were made by members of the sales team appears here.

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See Also

Chapter 10, “Understanding Sales Leads and Opportunities,” History Tracking for Leads and Opportunities, page 122

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CHAPTER 18

Sending Sales Email Messages and Correspondence

This chapter discusses how to:

- Send a proposal or quote to a customer.
- Send a worklist notification to a sales user or team.
- Generate ad hoc email notifications.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Correspondence Management"

Sending a Proposal or Quote to a Customer

PeopleSoft Enterprise Sales enables you to send a quote or a proposal package to a customer by emailing it or by sending a hard copy. A proposal package might include a cover letter, a quote, and attachments.

This section discusses how to:

- Select the recipient of a proposal or quote.
- Create the correspondence.

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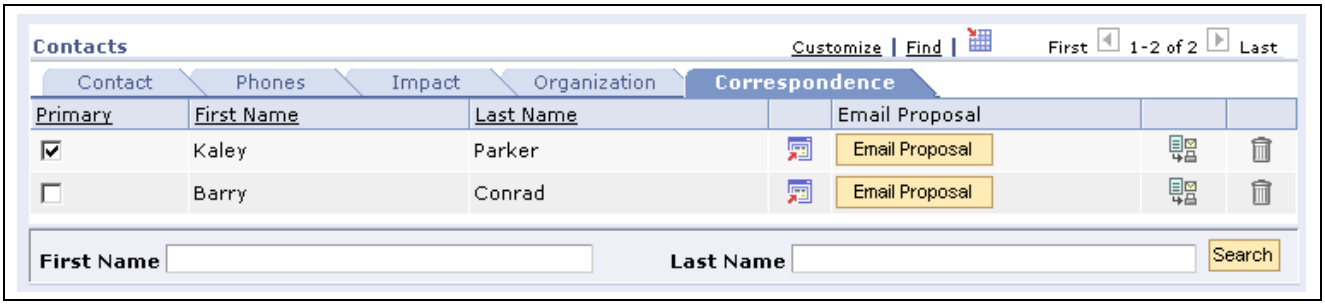
Pages Used to Send a Proposal or Quote to a Customer

Page Name	Object Name	Navigation	Usage
Lead - Discover	RSF_LEAD_DETAIL	Sales, Search Leads Select a lead, and select the Correspondence tab in the Contacts region.	Send email to a customer contact.
Opportunity - Discover	RSF_OPP_DETAIL	Sales, Search Opportunities Select an opportunity, and select the Correspondence tab in the Contacts region.	Send email to a customer contact.
Correspondence Request	RBC_REQST_FORM	• Click the Email Proposal button on the Lead - Discover or Opportunity - Discover page. • Click the Correspond button on the toolbar. • On the Discover page, Click the View Proposal Request icon on the Correspondence tab of the Contacts section.	Create correspondence to send to a customer.
Correspondence Request: Templates	RBC_REQST_TEMPLATE	Click the Personalize Templates button on the Correspondence Request page.	Edit the group of templates for the correspondence that you send to the contact.
Correspondence Request: Correspondence Summary	RBC_REQST_PREVIEW	• Click the Preview link on the toolbar. • Click the Submit link on the toolbar.	Review the correspondence request.
Search Correspondence Request	RBC_REQST_SEARCH	Click the Search button on the toolbar of any Correspondence Request page.	Search for correspondence requests.

Selecting the Recipient of a Proposal or Quote

Access the Opportunities - Discover: Correspondence page.



Opportunities - Discover: Correspondence page

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Email Proposal

Click to access the Create Correspondence page, where you can instruct the system to send an email message with the sales proposal package to the contact. The proposal package consists of a personalized cover letter and quote with related proposal documents. The cover letter is the body of the email message; and the quote and related proposal documents are attachments.

View and personalize the merged data on the Create Correspondence page.

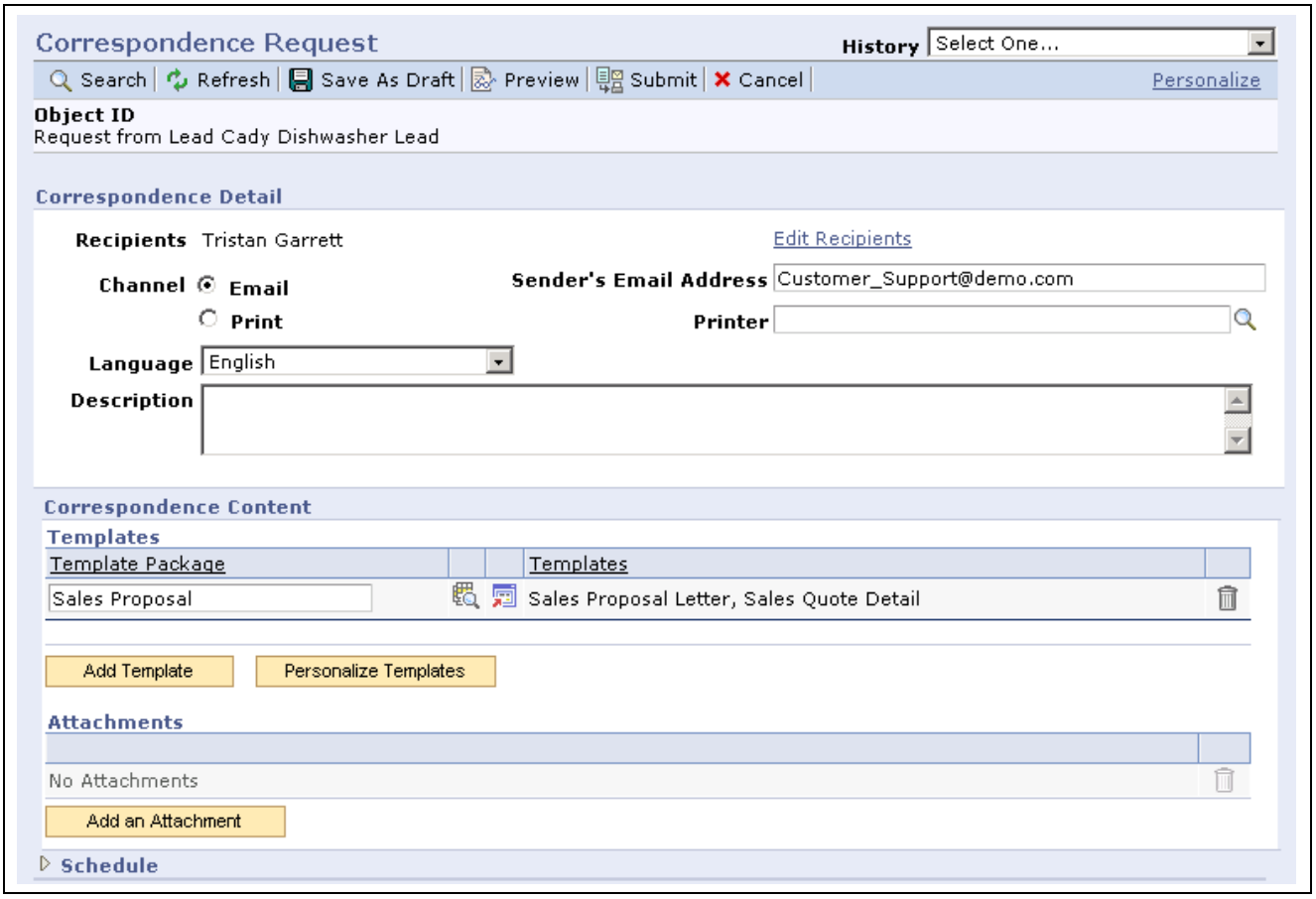
Click the View Proposal Request icon to access the Correspondence Request Detail, where you can confirm that the request is logged, determine its status, and view the error log, if any. This icon becomes active after you click the Email Proposal button.

After sending the proposal by email, access the History page to confirm that the proposal was sent and to view a list of all correspondence that was sent to any contact for the lead or opportunity. You can also access the correspondence to view its contents.

Note. You can access the Correspondence Request page by clicking the Correspond button on the toolbar. When you access the Correspondence Request in this way, the system adds all the contacts for the lead or opportunity to the recipient list of the correspondence.

Creating the Correspondence

Access the Correspondence Request page.



Correspondence Request page (1 of 2)

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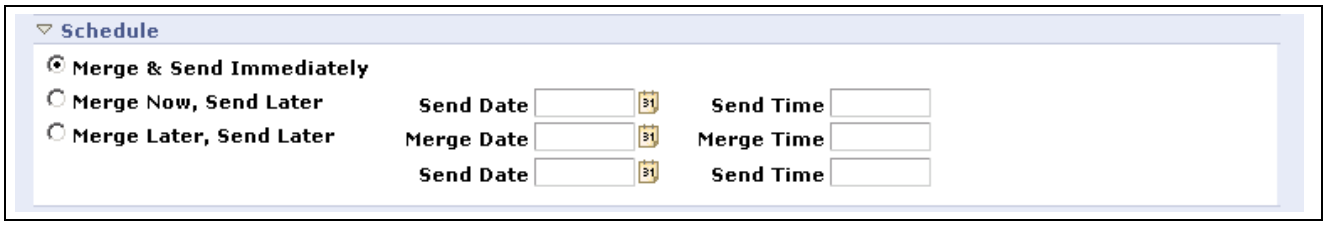

Correspondence Request page (2 of 2)

Template Package Select a group of templates that defines the set of documents that you send to the contact.

Personalize Templates Click to edit the template package that is sent to the contact.

In the Schedule section, you can specify when to merge and send the proposal.

Sending a Worklist Notification to a Sales User or Team

Use PeopleSoft Enterprise Sales to send a worklist notification with a text message and link to the current lead or opportunity. This section discusses how to send a worklist notification to a sales user or team.

Pages Used to Send a Workflow Notification to a Sales User or Team

Page Name	Object Name	Navigation	Usage
Send Notification	RSF_LEAD_WORKLIST	Click the Notify link on the toolbar in the Lead component.	Send a worklist notification to a sales user or team.
Send Notification	RSF_OPP_WORKLIST	Click the Notify button on the toolbar in the Opportunity component.	Send a worklist notification to a sales user or team.

Sending a Worklist Notification to a Sales User or Team

Access the Send Notification page.

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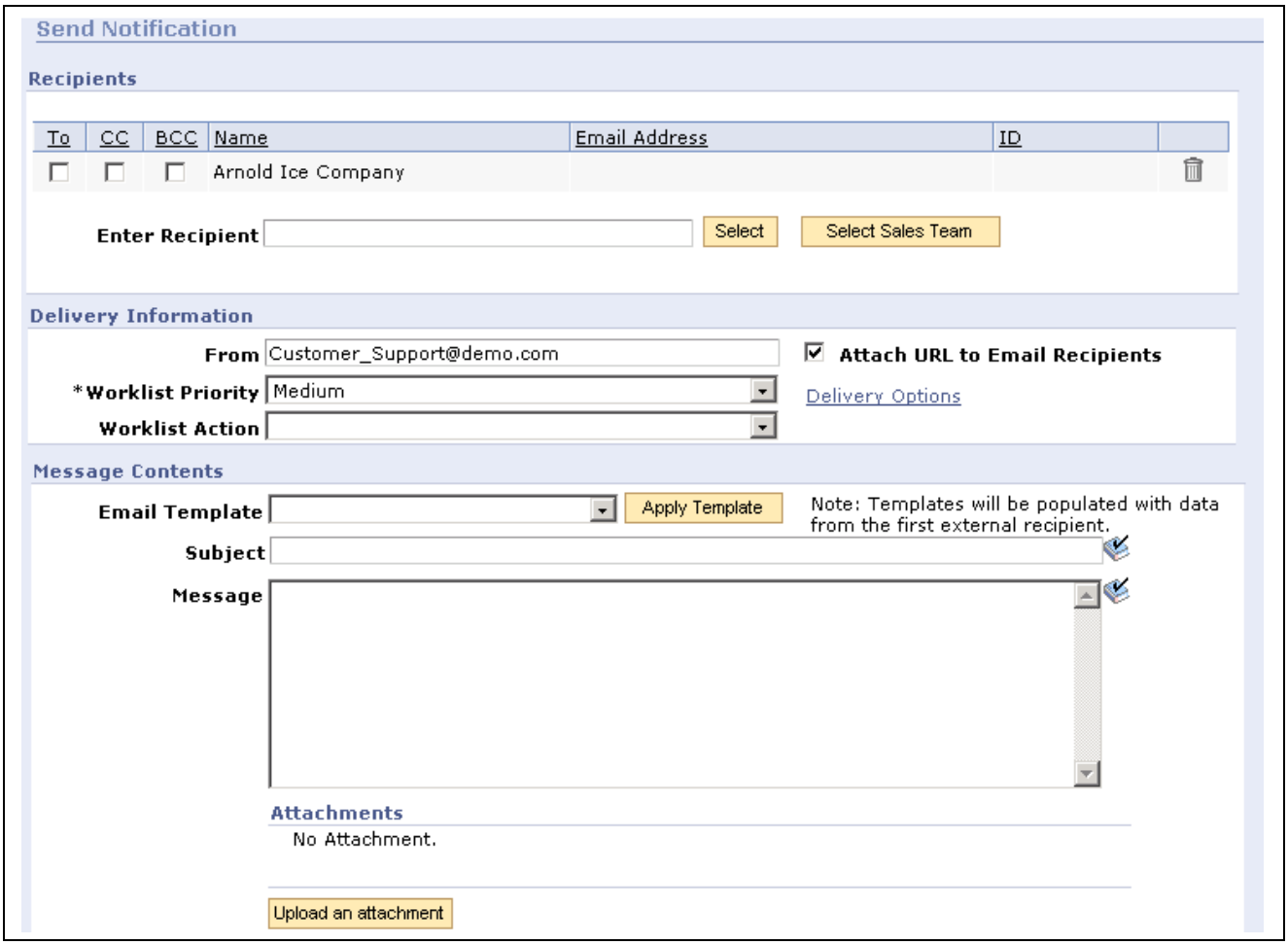

Send Notification page

Select	Click this button to select a sales user.
Select Sales Team	Click this button to select a sales team.
Worklist Priority	Select a priority for the worklist notification. Values are *Low, Medium,* and *High.*
Worklist Action	Select the action that you want the recipient to take.
Email Template	Select a template to use for the notification.
Apply Template	Click this button to apply the template to the page.

Generating Ad Hoc Email Notifications

This section discusses how to generate ad hoc email notifications.

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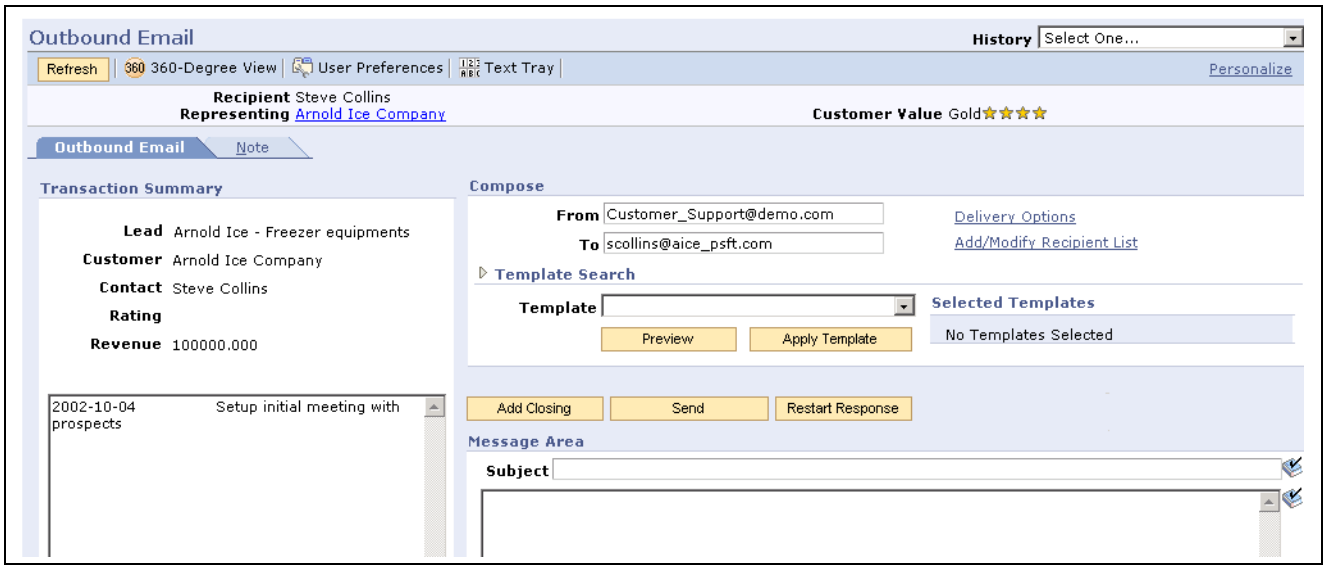
Page Used to Generate Ad Hoc Email Notifications

Page Name	Object Name	Navigation	Usage
Outbound Email	RB_EM_OB_ADD	Click the Email link on the toolbar of any page in the Lead component or the Opportunity component.	Generate and send an ad hoc email notification to a customer contact or a member of the sales team.

Generating Ad Hoc Email Notifications

Access the Outbound Email page.



Outbound Email page

Template Select a template to use for the email message.

Preview Click this button to preview the email message with the template applied.

Apply Template Click this button to apply the template to the page.

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CHAPTER 19

Viewing the Opportunity Pipeline

This chapter provides an overview of the opportunity pipeline, lists common elements, and discusses how to view the opportunity pipeline.

Understanding the Opportunity Pipeline

The opportunity pipeline is a real-time view of an organization's current sales activities. It is based on opportunities only. Leads are not included in the pipeline.

The pipeline does not include opportunities with an inactive status. Pipeline charts include activity from closed-lost opportunities as negative activity or leaks.

PeopleSoft Enterprise Sales enables you to view the following types of information:

- Segment pipeline.

  This pipeline reflects current activity based on opportunities with an open status. This perspective is not constrained by time frame or period. Opportunities with the status of inactive, closed-won, or closed-lost are not included in this perspective.

  Segment pipeline types include:

  - Opportunity count
  - Revenue

- Opportunity Revenue pipeline.

  This pipeline represents estimated revenue, based on opportunities with open, closed-won, or closed-lost status.

  Opportunity Revenue pipeline types include:

  - Revenue
  - Shadow

- Product Detail pipeline.

  This pipeline represents product activity based on opportunities with open, closed-won, or closed-lost status.

  Product Detail pipeline types include:

  - Unit count
  - Revenue
  - Shadow

Use pipeline types to configure different perspectives of the specified pipeline. Pipeline types include:

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- Opportunity count.

  This pipeline type reflects the total number of opportunities.

- Revenue.

  This pipeline type represents estimated revenue based on allocation percentages of the opportunity sales teams.

- Shadow.

  This pipeline type represents estimated revenue based on shadow percentages of the opportunity sales team members.

- Unit count.

  This pipeline type reflects product quantities for current opportunities.

Note. You cannot save real-time views of dynamic data. Therefore, if you need to preserve a particular pipeline view, use the screen capture or print function that you use to capture or print an image of the computer screen. Alternatively, you can produce a list of the opportunities that make up the pipeline by clicking the Pipeline Opportunity List button and downloading the data to a spreadsheet.

Common Elements Used in This Chapter

Click the Chart Information button to have the page display a message with information about the chart.

View Pipeline As To view the pipeline as another person would view it, select that person's name. You must have visibility of the person on the territory tree to use this feature. Viewing a pipeline as someone else enables managers to review sales users' pipelines before meeting to discuss the pipelines.

Quota Type Select the type of quota for revenue allocation comparison. Values are:

*Rollup Quota:*The sum of quotas for all sales representatives who report to the manager. This is the default.

Manager Quota: The manager's own, individual quota.

Chart Type Select the type of chart to use when viewing the pipeline. Values are *Bar Chart* (default), *Horizontal Bar Chart, Horizontal Stacked Bar Chart* and *Stacked Bar Chart.*

Pipeline Opportunity List Click to access the opportunities list, where you can view lists of the opportunities that make up the pipeline chart and select opportunities to view in detail.

Viewing the Opportunity Pipeline

This section discusses how to:

- View the segment pipeline.
- View the opportunity revenue pipeline.

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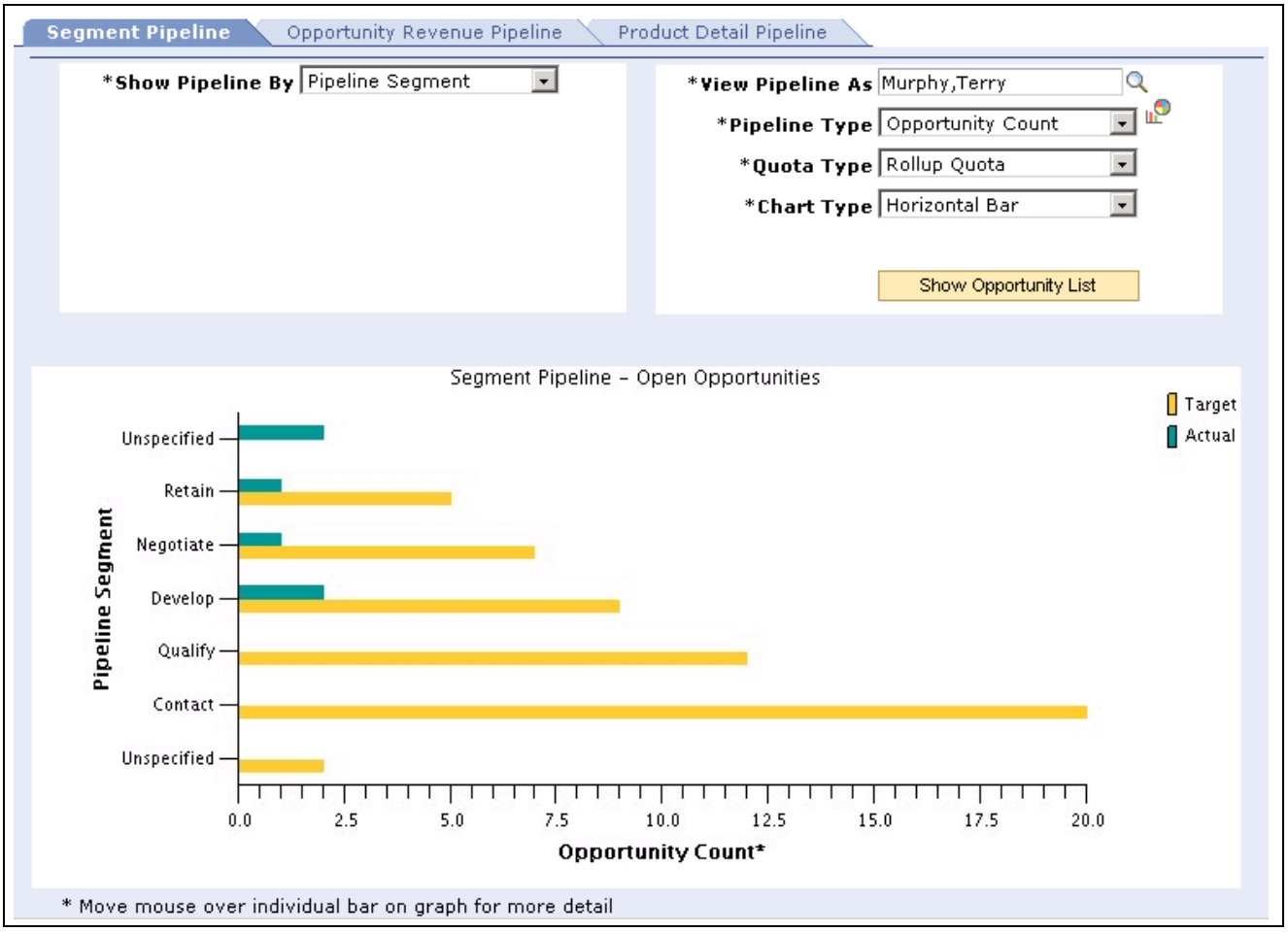
- View the product detail pipeline.

Pages Used to View the Opportunity Pipeline

Page Name	Object Name	Navigation	Usage
Segment Pipeline	RSF_PL_SEG	Sales, Review Pipeline, Segment Pipeline	Configure and view the pipeline of opportunities at different stages of the sales process.
Opportunity Revenue Pipeline	RSF_PL_OPP	Select the Opportunity Revenue Pipeline tab on the Segment Pipeline page.	Configure and view the pipeline of revenue from opportunities.
Product Detail Pipeline	RSF_PL_PROD	Select the Product Detail Pipeline tab on the Segment Pipeline page.	Configure and view the pipeline of products that are associated with active opportunities.

Viewing the Segment Pipeline

Access the Segment Pipeline page.



Segment Pipeline page

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Show Pipeline By Select how to organize data for the pipeline. Values are:

Business Unit.

Industry.

Pipeline Segment. Pipeline segments correlate with stages in the sales process. This is the default.

See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Pipeline Segments, page 57.

Region.

Sales User.

Territory.

Pipeline Type Select the type of pipeline to render. Values are:

Opportunity Count: This count is based on the number of opportunities with the status of *Open.*

Revenue: This pipeline shows the estimated opportunity revenue from the opportunity sales teams' revenue allocation percentages. (You cannot render a pipeline from shadow allocations.)

Viewing the Opportunity Revenue Pipeline

Access the Opportunity Revenue Pipeline page.

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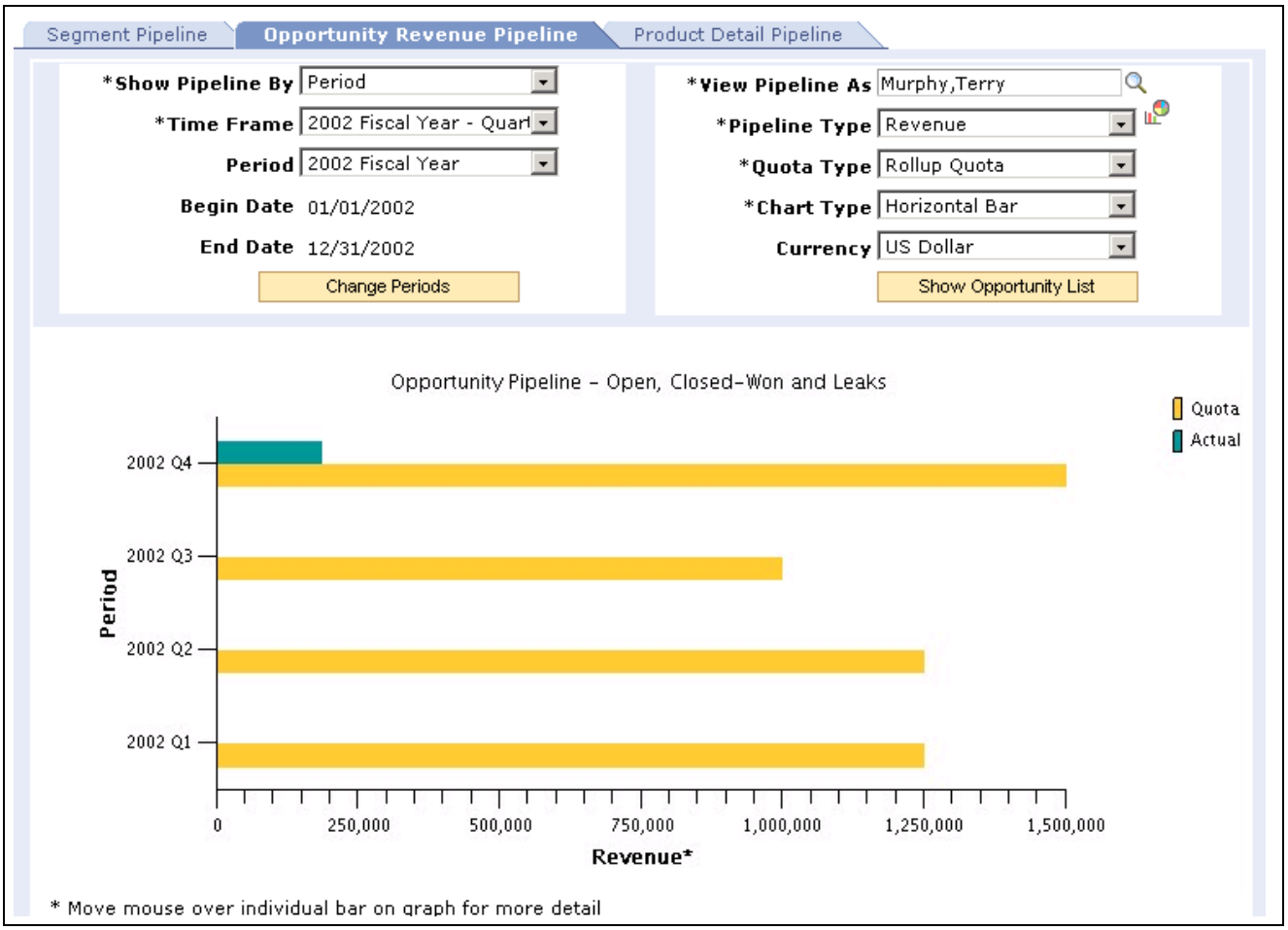

Opportunity Revenue Pipeline page

The Opportunity Revenue pipeline includes opportunities with estimated close dates that are within the specified time frame and with a status of open, closed-won, or closed-lost. Inactive opportunities are not included. Closed-lost opportunities appear as leaks in the pipeline.

Show Pipeline By Select how to organize data for the pipeline. Values are:

- *Business Unit.*
- *Industry.*
- *Opportunity Status.*
- *Period.*
- *Pipeline Segment.*

  Pipeline segments correlate with stages in your sales process. This is the default.

  See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Pipeline Segments, page 57.
- *Region.*
- *Sales User.*
- *Territory.*

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Pipeline Type Select the type of pipeline to render. Values are:

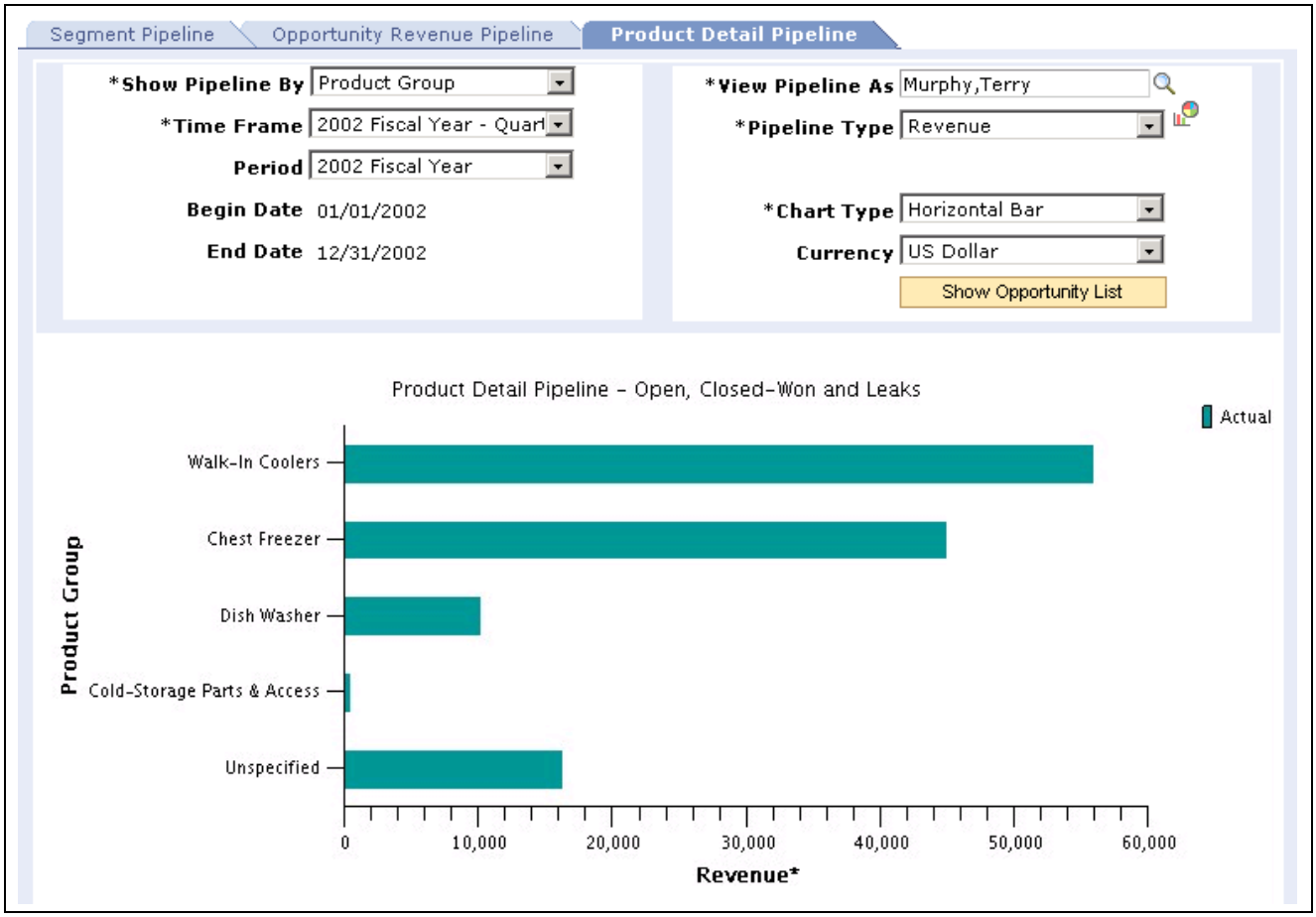
- *Revenue:* This shows the estimated revenue based on opportunity sales team revenue allocations.
- *Shadow:* This shows the estimated revenue based on opportunity sales team member shadow allocations.

Time Frame and **Period** Select the time frame and reporting period to use for determining revenue in the pipeline.

Currency Select the currency used for the pipeline revenue amounts.

Viewing the Product Detail Pipeline

Access the Product Detail Pipeline page.



Product Detail Pipeline page

Show Pipeline By Select how to organize data for the pipeline. Values are:

- *Business Unit.*
- *Industry.*
- *Opportunity Status.*
- *Period.*

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- *Pipeline Segment.*

  Pipeline segments correlate with stages in the sales process. This is the default.

  See Chapter 5, "Setting Up Sales Leads and Opportunities," Setting Up Pipeline Segments, page 57.

- *Product.*

  When you select the pipeline type of *Unit Count,* the system sets the Show Pipeline By field to *Product.*

- *Product Group.*
- *Region.*
- *Revenue Type.*
- *Sales User.*
- *Territory.*

Pipeline Type Select the type of pipeline to render. Values are:

- *Revenue:* This shows the estimated product cost based on opportunity sales team revenue allocations. This is the default.
- *Shadow:* This shows the estimated product cost based on opportunity sales team member shadow allocations.
- *Unit Count:* This shows the estimated product quantities.

Time Frame and **Period** Select the time frame and reporting period to use for determining opportunities in the pipeline.

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CHAPTER 20

Including Opportunities in Forecasts and Closing Opportunities

This section provides an overview of opportunities included in forecasts, and discusses how to:

- Include opportunities in forecasts.
- Close opportunities.

Understanding Opportunities Included in Forecasts

To include an opportunity's potential revenue in a sales forecast, the sales representative must update forecasting data for the opportunity. The sales representative can copy the products from the opportunity's proposal to the forecast for the opportunity.

Some companies offer products that generate recurring revenue. For example, an internet service provider may offer a one-year service contract that generates $20 per month in revenue. Other companies, such as wireless companies, offer products with both one-time and recurring revenue. For example, a wireless company might offer a package with a cellular phone (nonrecurring revenue) and a monthly calling plan (recurring revenue). PeopleSoft Enterprise Sales enables you to forecast for both of these scenarios.

If an opportunity has multiple sales representatives assigned to it, the sales manager uses the Revenue Percentage tab on the Opportunity - Assign page to specify how to allocate the forecast among the sales representatives.

After the customer has made a decision, you can close the opportunity. If you have open forecasts for an opportunity that was closed-won, you can specify whether you want to continue to forecast revenue for the opportunity.

Including Opportunities in Forecasts

This section discusses how to:

- Use the forecast summary.
- Copy products to the forecast.
- Use recurring forecasts.
- Specify revenue percentages for forecasting.
- Include forecast items in compensation calculations.

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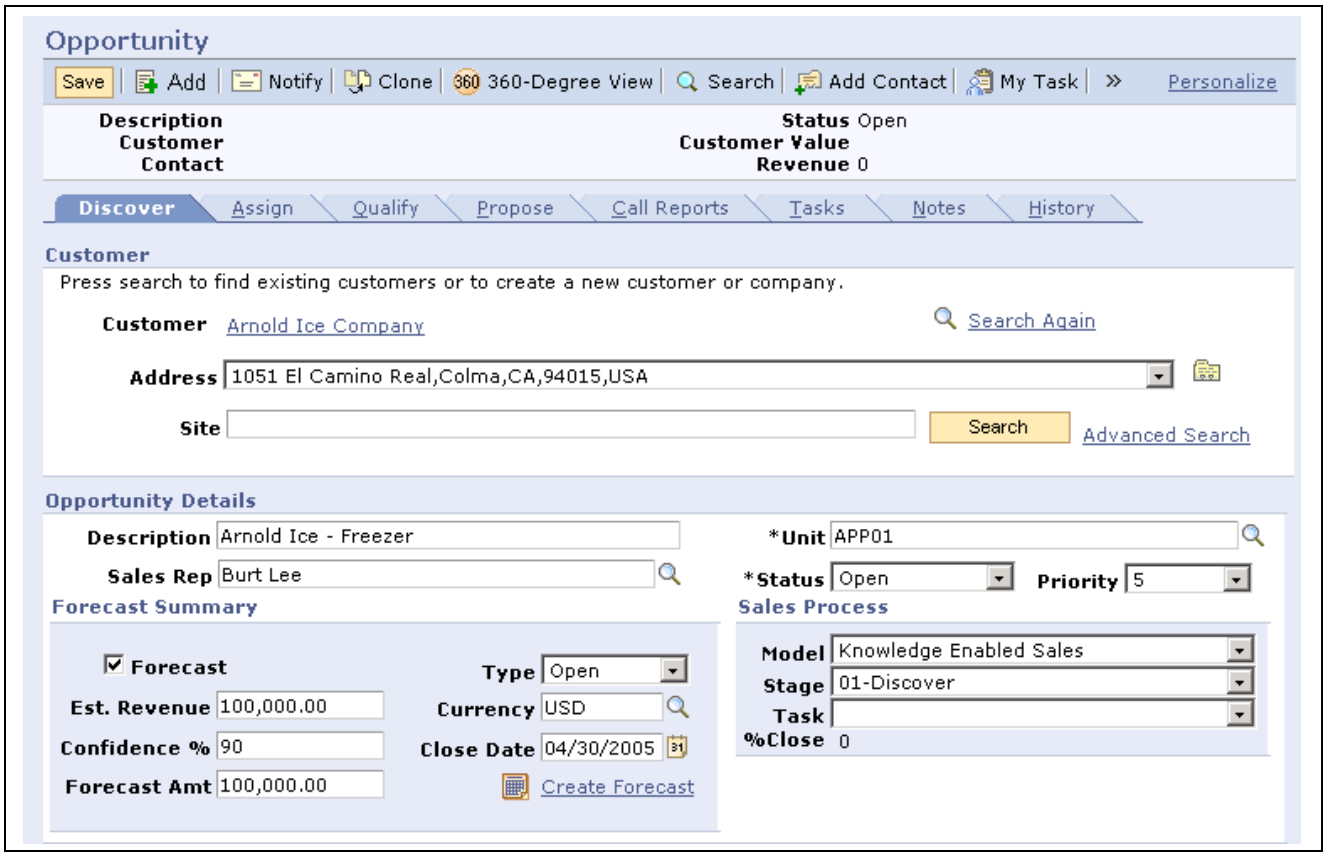
Pages Used to Include Opportunities in Forecasts

Page Name	Object Name	Navigation	Usage
Opportunity - Discover	RSF_OPP_DETAIL	Sales, Search Opportunities Select an opportunity, and select the Discover tab.	Enter information for the forecast summary.
Opportunity - Propose	RSF_OPP_PROPOSE	Sales, Search Opportunities Select an opportunity, and select the Propose tab.	Include an opportunity in the forecast.
Copy Products to Forecast	RSF_OPP_COPYFCAST	On the Opportunity - Propose page, click the Create Forecast button.	View and verify products to copy to forecasts.
Distribute Recurring Revenue	RSF_OPP_DISTRIB	Click the Distribute link from the Recurring tab of the Copy Products to Forecast page.	Enter recurring revenue.
Send to EIM	RSF_SENDTO_EIM_SEC	On the Opportunity - Propose page, click the Compensate Selected button.	Send forecast information to PeopleSoft Enterprise Incentive Management.

Using the Forecast Summary

Access the Opportunity - Discover page.



Opportunity - Discover page (1 of 2)

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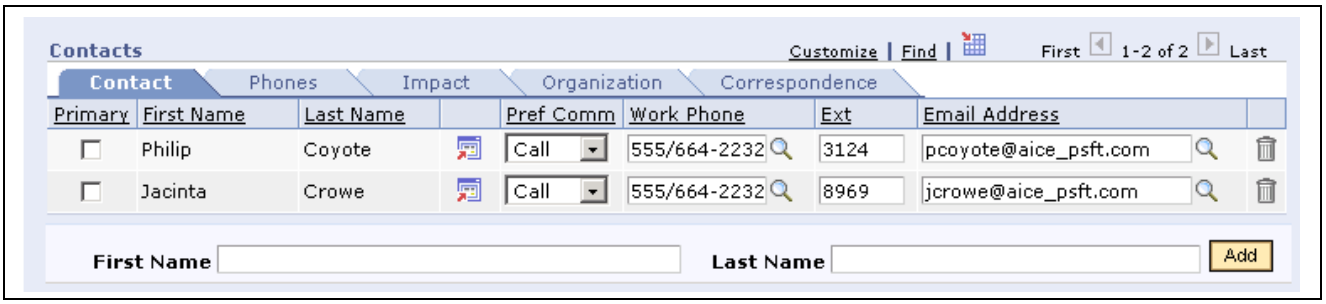

Opportunity - Discover page (2 of 2)

If you want to include an opportunity's revenue on a forecast but don't want to specify the actual products, you can use the Forecast Summary group box on the Opportunity - Discover page.

Forecast

Select to include this opportunity in generated forecasts. When you save the page, the system copies the estimated revenue into the Forecast Amount field on this page, and it adds the opportunity in the Forecast grid of the Opportunity - Propose page.

Type

If you select Forecast, you must select the type of forecast to use.

You define forecast types on the Forecast Type page.

See Chapter 6, "Setting Up Sales Forecasts," Defining Forecast Types, page 77.

Est. Revenue (estimated revenue)

Enter the amount of revenue that is anticipated from the sale.

Currency

Enter the currency code for the revenue. The default currency code is the code that is associated with the sales user on the Sales User page.

If no products are associated with the opportunity, you can override the default currency code. Doing so changes the currency here and on the Product page.

Confidence % (confidence percentage)

Displays the average degree of confidence (expressed as a percentage) that the assigned sales representative feels that the opportunity will result in a closed sale. If you have not entered product forecast rows on the Opportunity - Propose page, you can manually enter the confidence percentage here.

After products are forecast, this field is display-only and shows the average of all confidence percentages for the opportunity from the Forecast grid of the Opportunity - Propose page.

For example, if there are three products identified for forecasting from this opportunity—the first with a confidence of 70 percent, the second with 80 percent, and the last with 90 percent—the system calculates the average, as follows: (70 + 80 + 90) ÷ 3 = 80. The system displays that result here.

Close Date

Enter a date for the amount that is forecast.

Forecast Amt (forecast amount)

If you select the Forecast check box, a forecast amount must be specified. There are two ways that this can happen:

- If the opportunity is not yet forecast and you select the Forecast check box, then the system copies the estimated revenue amount into this field when you save the page.

  You can override this value.

- You can enter the forecast amount.

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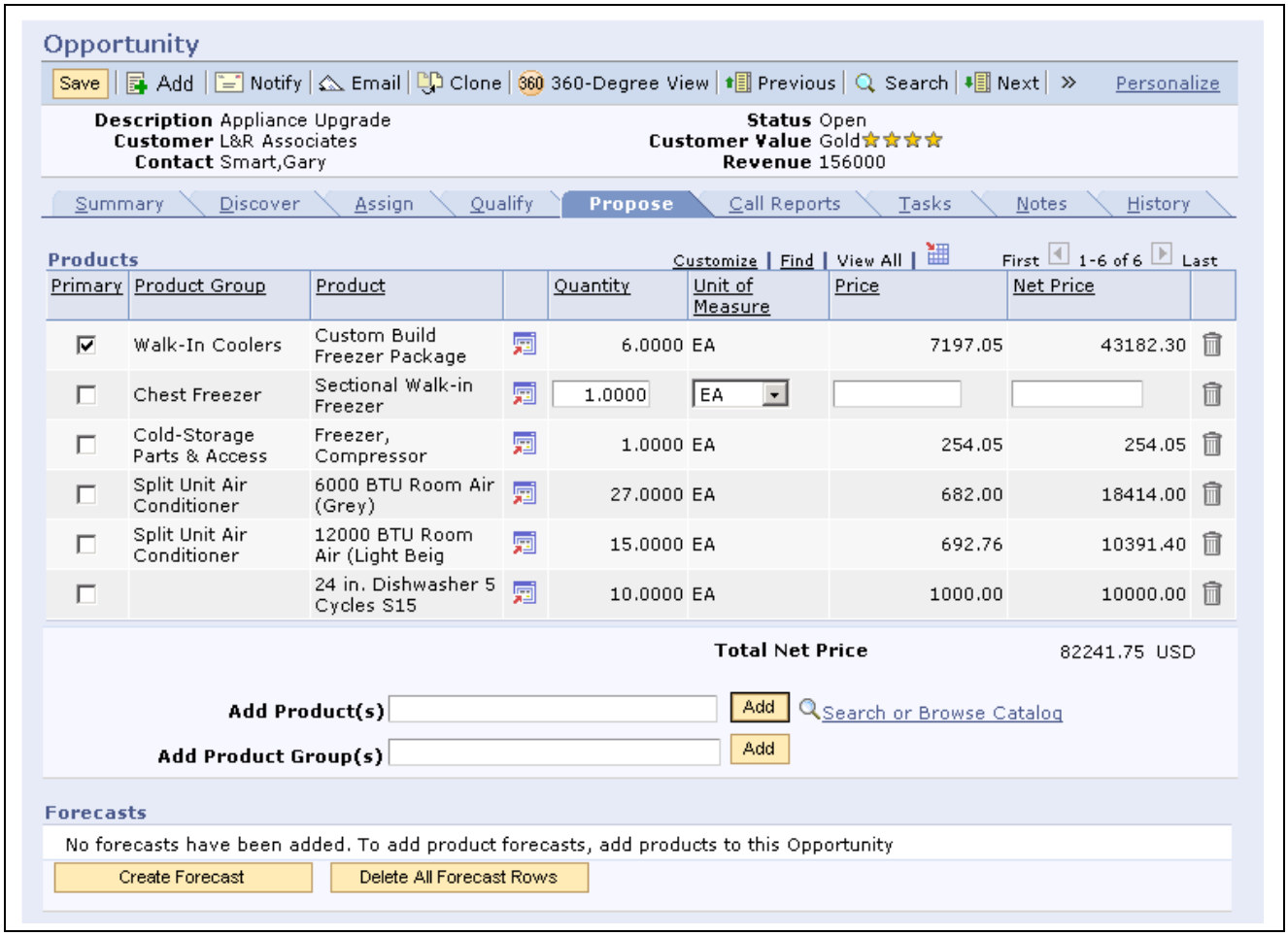
Create Forecast Click this link to create a forecast on the Opportunity - Propose page.

Copying Products to Forecast

Access the Opportunity - Propose page.



Opportunity - Propose page

If you want to include an opportunity's products on a forecast, you can copy the products to the Forecast grid of the Opportunity - Propose page.

Click the Create Forecast button to access the Copy Products to Forecast page.

Note. If there is existing forecast information when you click the Create Forecast button, the system displays the existing forecast on the Copy Products to Forecast page. You cannot copy products to the forecast if the forecast already exists for the products.

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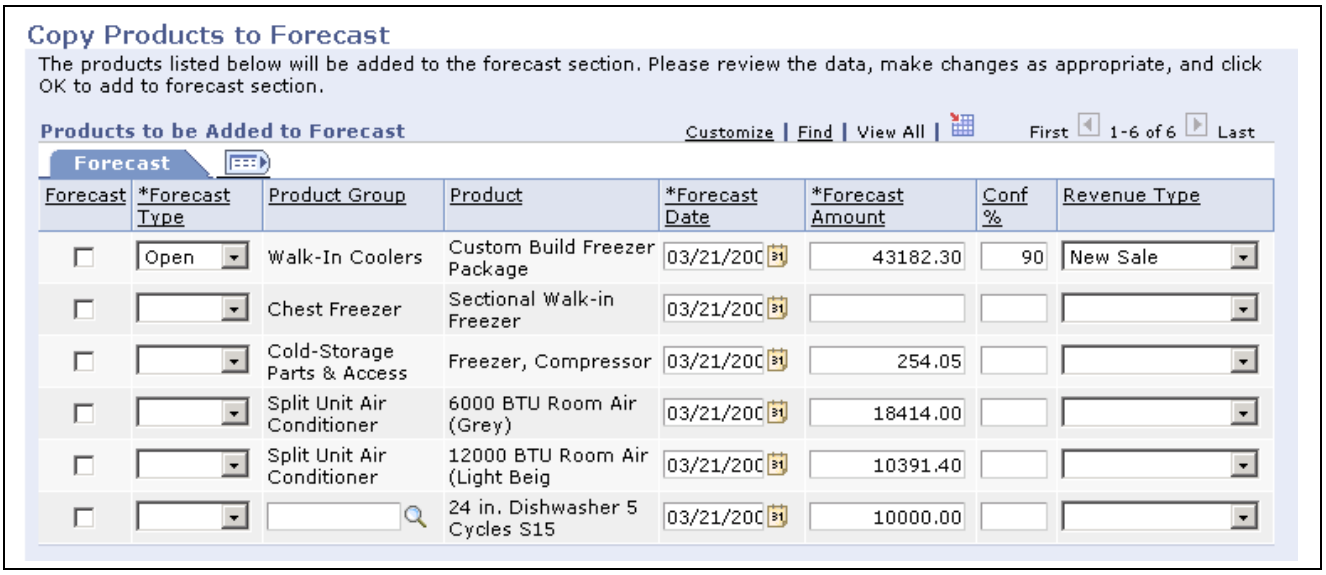

Copy Products to Forecast page

After you enter forecast information on the Copy Products to Forecast page and click OK, the system adds the information to the Forecast grid of the Opportunity - Propose page.

Forecast Select this check box to include the revenue in the forecast.

Forecast Type Select a user-defined forecast type.

See Chapter 6, "Setting Up Sales Forecasts," Defining Forecast Types, page 77.

Forecast Amount Enter a forecast amount.

Confidence % (confidence percentage) Enter a whole number the specifies the probability that the forecast will become an actual sale.

Revenue Type Select a user-defined revenue type. This is an optional field.

See Chapter 6, "Setting Up Sales Forecasts," Defining Revenue Types, page 77.

Using Recurring Forecasts

Access the Opportunity - Propose page.

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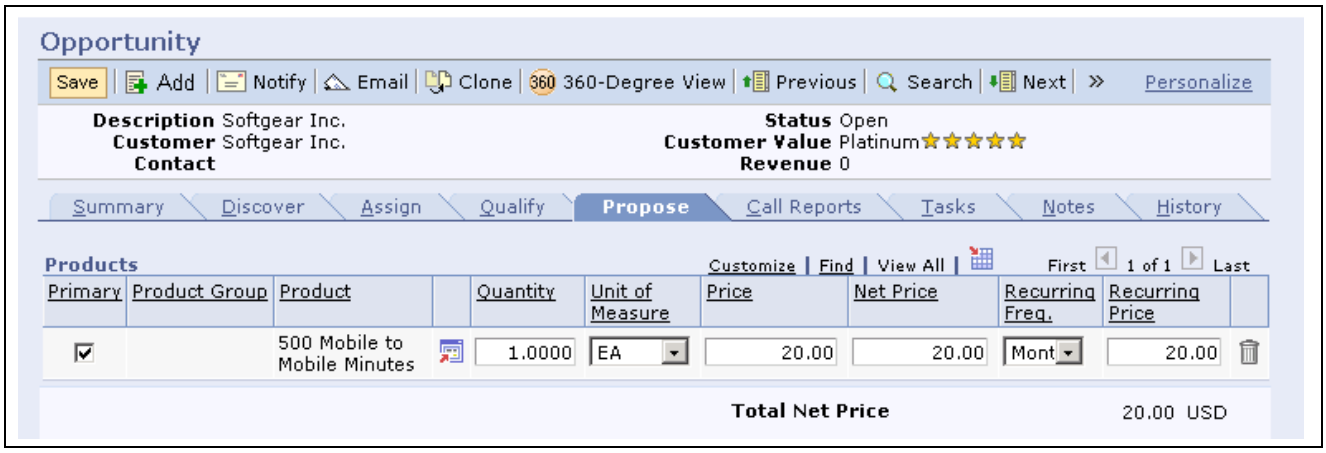


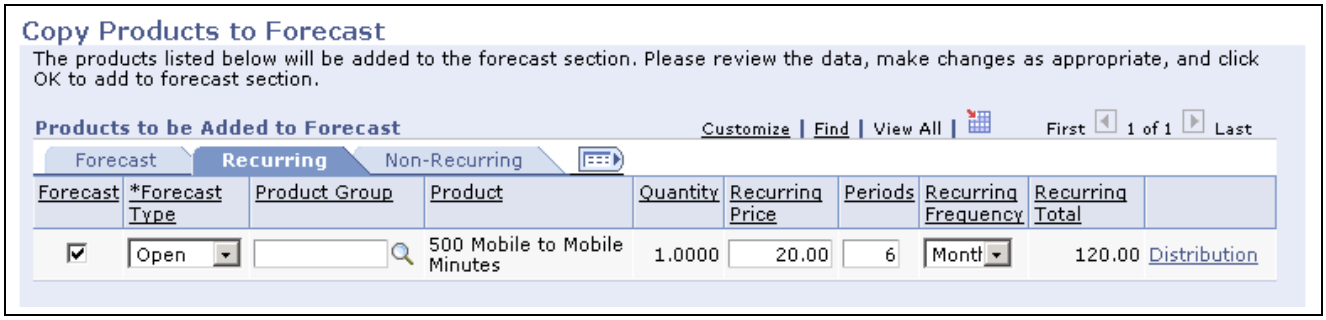
Opportunity - Propose page

If the product has recurring revenue, the system displays the following fields:

Recurring Freq. (recurring frequency) Select the period of time for the recurring revenue. Values are *Daily, Weekly, Monthly, Quarterly,* and *Yearly*.

Recurring Price Enter the recurring revenue for each period of time.

To create a forecast for recurring revenue, click the Create Forecast button to access the Copy Products to Forecast page, and select the Recurring tab.



Copy Products to Forecast page: Recurring tab

Enter the forecast information, including the number of periods for the recurring revenue. You can click the Distribution link to access the Distribute Recurring Revenue page, where you can view or modify the distribution of recurring revenue over a period of time. If you do not access this page but you select the Forecast check box, the system populates the Forecast grid on the Opportunity - Propose page with recurring revenue based on the values specified on the Recurring tab.

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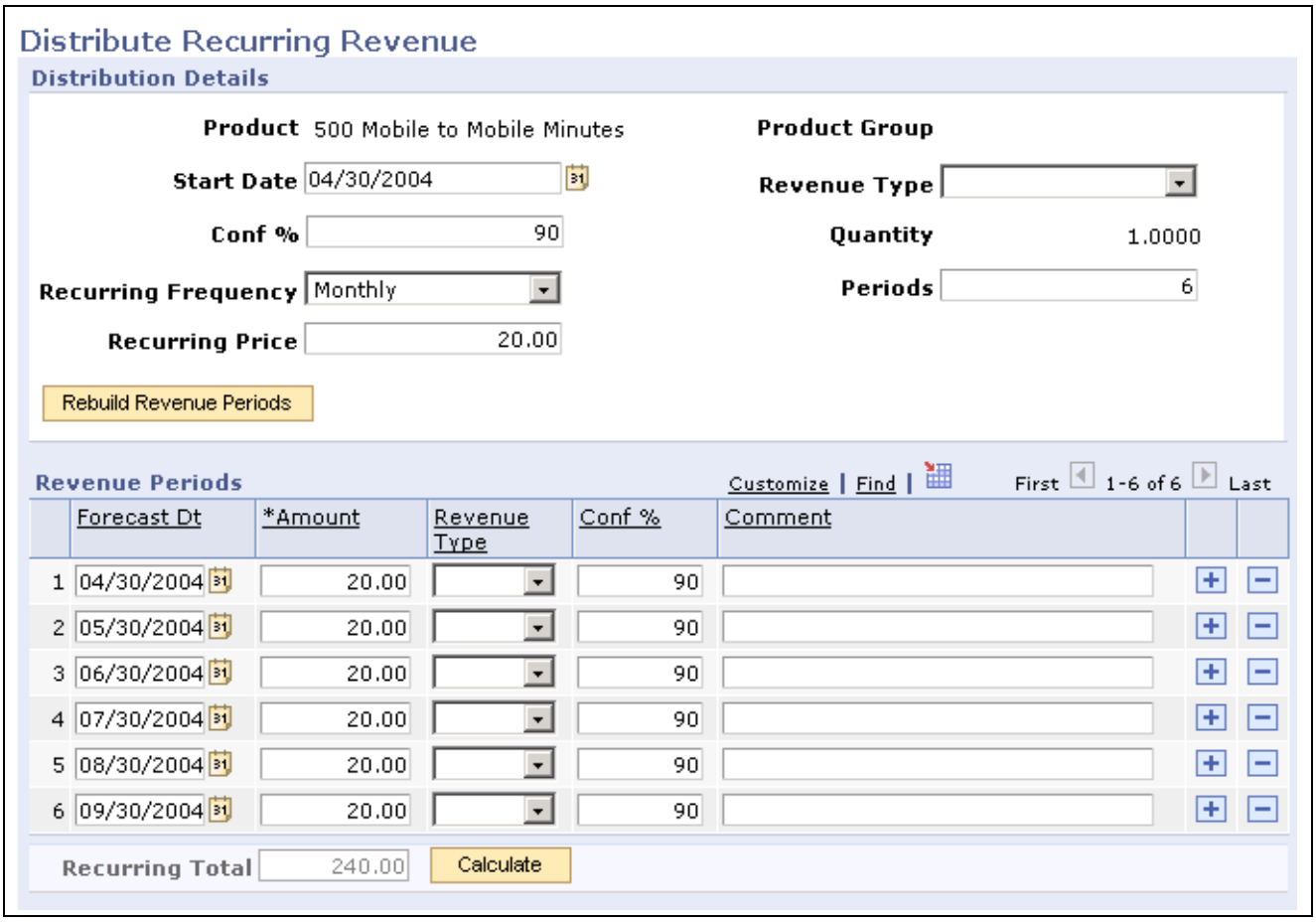
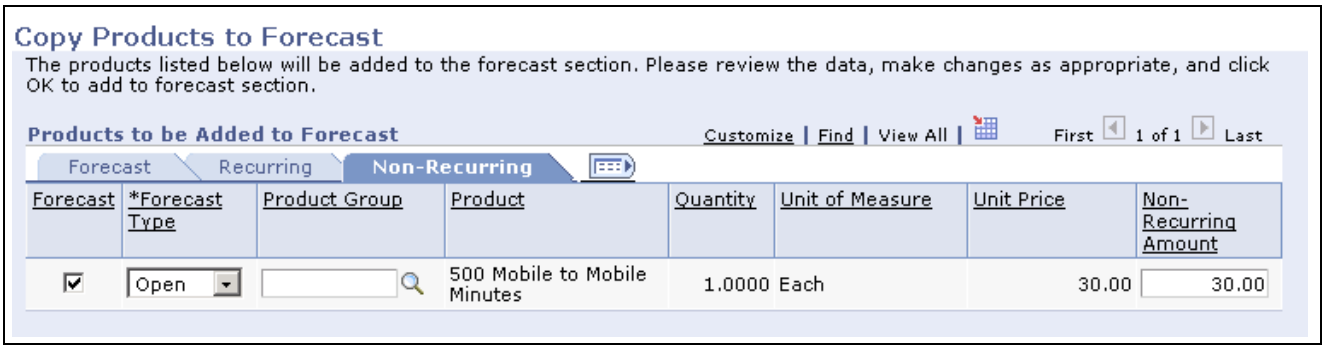


Distribute Recurring Revenue page

Make any changes in the Distribution Details group box, and then click the Rebuild Revenue Periods button to refresh the data in the Revenue Periods grid. The system populates the first forecast date with the value in the Start Date field and then creates additional forecast dates based on the value in the Recurring Frequency field. Click the Calculate button to generate a value for the Recurring Total field.

If you change the forecast amount, then when you access the Recurring tab of the Copy Products to Forecast page, the system displays a Review link instead of the Distribute link to indicate that manual changes have occurred.

To enter nonrecurring revenue, select the Non-Recurring tab of the Copy Products to Forecast page.



Copy Products to Forecast page: Non-Recurring tab

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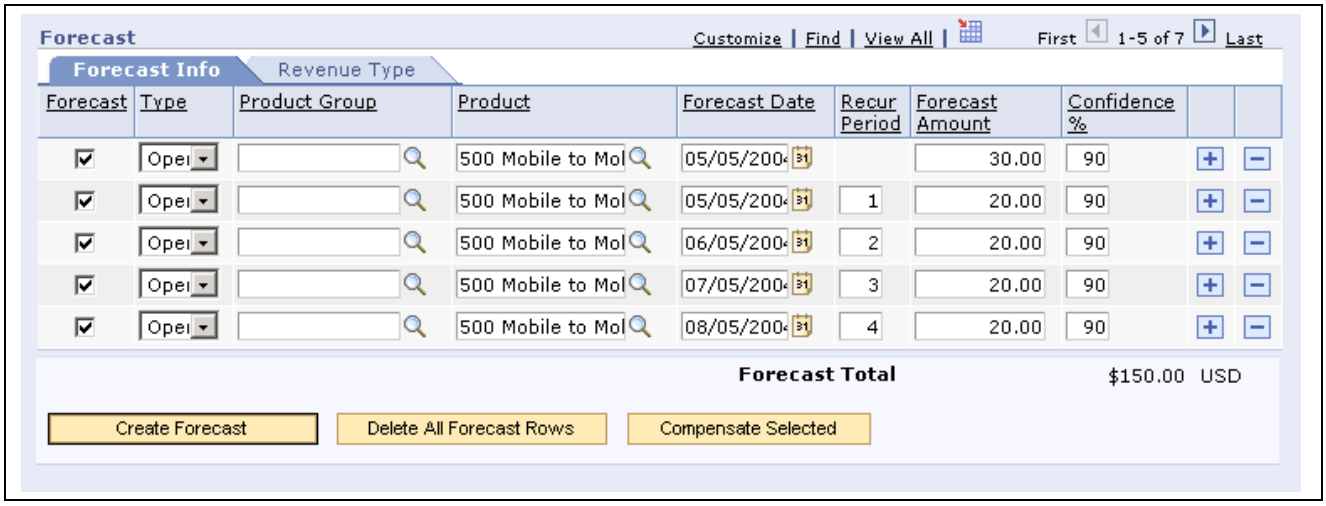
The system populates the Forecast grid of the Opportunity - Propose page with both the recurring and nonrecurring revenue. The nonrecurring revenue does not have a value in the Recur Period field. This grid contains the data that system uses to populate the Forecast page when a sales representative uses the Add Forecast component or when a sales manager uses the Search Forecasts component to auto-forecast.



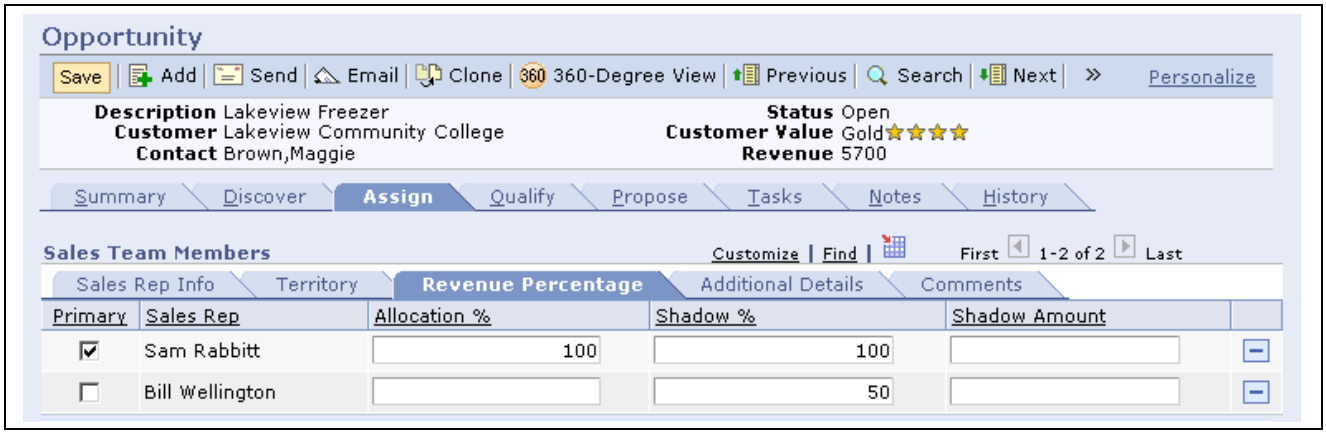
Opportunity - Propose page: Forecast grid

Compensate Selected Click to send the selected forecasts to PeopleSoft Enterprise Incentive Management. This button appears only if you have selected Incentive Management as an installation option.

Specifying Revenue Percentages for Forecasting

Access the Opportunity - Assign page. Select the Revenue Percentage tab.

Note. The Revenue Percentage tab may be hidden in the Opportunities component, depending on the access profile of the user. Typically, only sales managers have access to this tab.



Opportunity - Assign page: Revenue Percentage tab

Note. Revenue allocations are required for the system to roll up an opportunity into pipelines and forecasts. Only opportunities can be rolled up into pipelines and forecasts. You cannot include leads in pipelines and forecasts. Therefore, the Revenue Percentage tab appears in the Opportunity component only. There is no equivalent tab in the Lead component.

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Allocation % (allocation percentage) Enter the percentage of the total revenue to allocate to this member of the sales team for forecasting.

Often, 100 percent of the revenue is allocated to the primary member of the sales team, but it can also be distributed across two or more members of the team. The sum of the allocation percentages must total 100 percent.

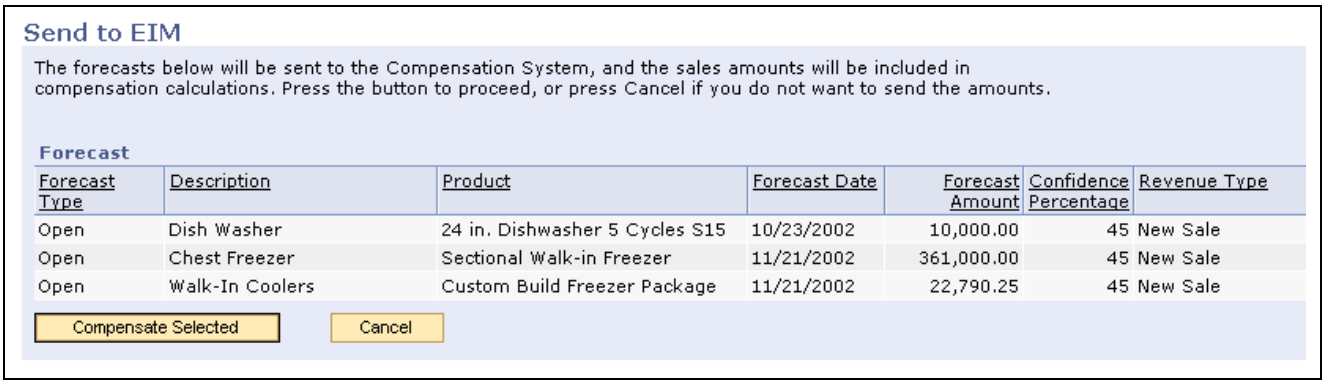
Shadow % (shadow percentage) Enter the percentage of revenue that the individual is expected to earn.

Note. The sum of the shadow percentages does not have to equal 100 percent.

Shadow Amount Enter a lump sum amount that the individual is expected to earn.

Including Forecast Items in Compensation Calculations

Access the Send to EIM page.


Send to EIM

The forecasts below will be sent to the Compensation System, and the sales amounts will be included in compensation calculations. Press the button to proceed, or press Cancel if you do not want to send the amounts.

Forecast

Forecast Type	Description	Product	Forecast Date	Forecast Amount	Confidence Percentage	Revenue Type
Open	Dish Washer	24 in. Dishwasher 5 Cycles S15	10/23/2002	10,000.00	45	New Sale
Open	Chest Freezer	Sectional Walk-in Freezer	11/21/2002	361,000.00	45	New Sale
Open	Walk-In Coolers	Custom Build Freezer Package	11/21/2002	22,790.25	45	New Sale

Compensate Selected Cancel

Send to EIM page

You can integrate PeopleSoft Enterprise Incentive Management with PeopleSoft Enterprise Sales to include opportunity revenues in compensation calculations. You can set up a single sign-on between the two databases and exchange opportunity forecasting data between PeopleSoft Enterprise Sales and PeopleSoft Enterprise Incentive Management. To enable Incentive Management, access the General Options page by navigating to Set Up CRM, Install, Installation Options. Select the Incentive Management check box.

On the Send to EIM page, click the Compensate Selected button to send the forecasts to PeopleSoft Enterprise Incentive Management.

See *PeopleSoft Enterprise Components for PeopleSoft Enterprise Incentive Management 9 PeopleBook*

Closing Opportunities

This section discusses how to close opportunities.

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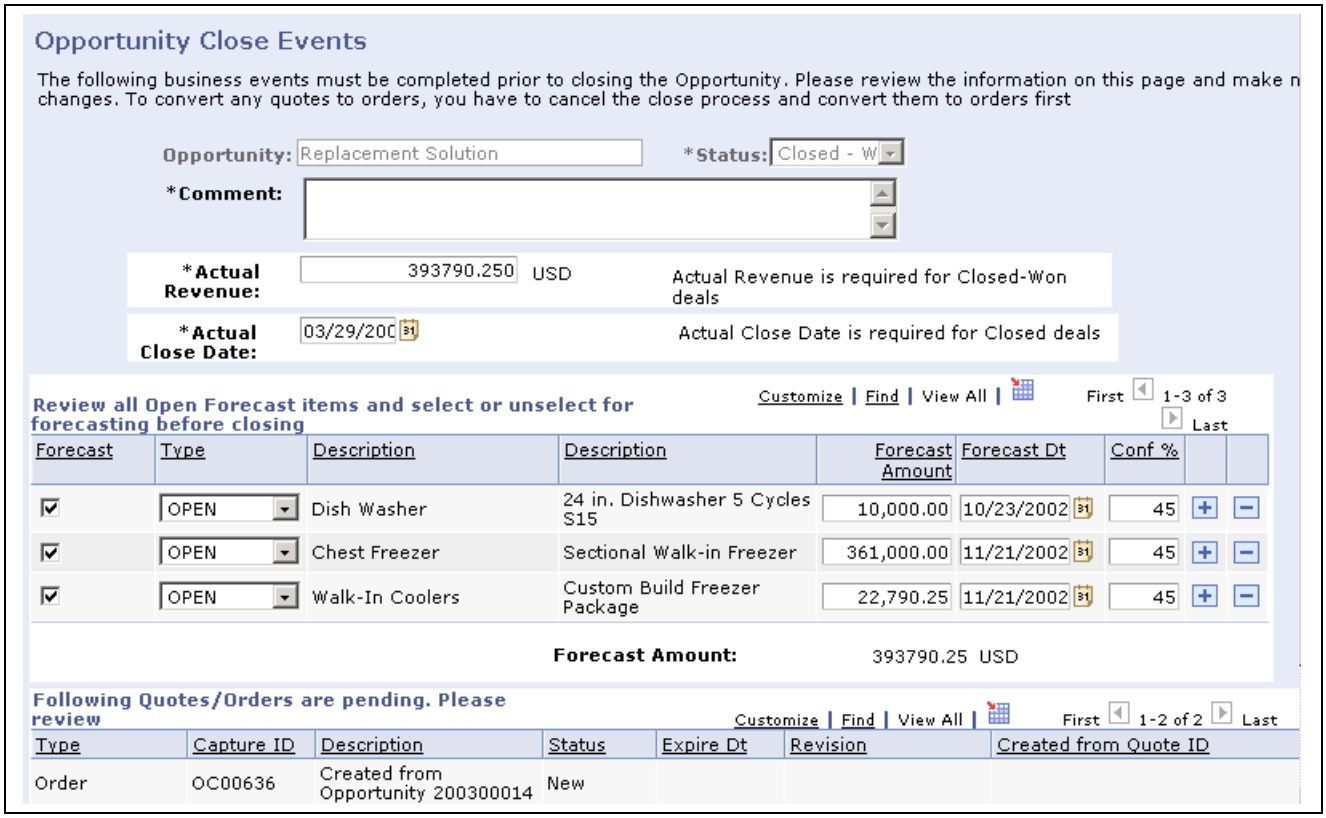
Page Used to Close Opportunities

Page Name	Object Name	Navigation	Usage
Opportunity Close Events	RSF_OPP_CLOSE_SEC	Sales, Search Opportunities Select an opportunity, and select the Discover tab. On the Opportunity - Discover page, select a status of *Closed - Won* or *Closed - Lost,* Click Save.	Close an opportunity.

Closing Opportunities

To close an opportunity, access the Opportunity - Discover page, and enter the appropriate value in the Status field. Values are *Closed - Won* and *Closed - Lost.* When you save the page, the Opportunity Close Events page appears.



Opportunity Close Events page

Note. When an opportunity includes a prospect customer and you change its status to *Closed - Won*, you must either create a new CDM customer using quick create or select an existing customer. You also have the option to push any prospect contacts to CDM when saving the opportunity.

You must enter comments and other data here to close an opportunity successfully. Also, you must review the forecast items and either select or clear the Forecast check box to include them in the forecast or exclude them.

After you close the opportunity, the system displays the actual close date and actual revenue on the Close tab of the Opportunities List page for the opportunity.

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Comment Enter a reason for the win or loss.

Actual Revenue Displays the actual revenue from the closed-won opportunities.

An actual revenue amount is required to close the opportunity successfully.

Actual Close Date Enter the close date; the system's current date is the default.

Forecast Select for each item that you want to include in forecasting from the closed opportunity. Ensure that the check box is cleared for all items that you do not want to include in forecasting.

Items from a closed-lost opportunity that have the Forecast check box selected appear in the pipeline as leaks. You can not forecast revenue for a closed-lost opportunity.

See Chapter 20, "Including Opportunities in Forecasts and Closing Opportunities," Including Opportunities in Forecasts, page 223.

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PART 4

Using Forecasts

Chapter 21
Understanding Sales Forecasts

Chapter 22
Using Forecasts

CHAPTER 21

Understanding Sales Forecasts

This chapter discusses:

- Forecasts.
- Revenue and shadow forecasts.

Forecasts

In PeopleSoft Enterprise Sales, forecasts are estimates of future sales revenues based on current opportunities, their projected revenue estimates, closing dates, and other factors. If your access profile permits, you can edit forecast data and add rows to make adjustments to forecasts. You might combine the forecasts of 10 team members to produce one roll-up forecast for the team. You can view forecasts at a summary level and then filter and sort summaries for analysis.

You can generate forecast subtotals, and you can create charts to view forecasts graphically. You can also use the Combined Forecasts page and the standard download feature to export forecast data to financial modeling programs outside the database.

PeopleSoft Enterprise Sales enables you to configure forecasting to your organization's business processes and reporting period needs. Sales representatives can generate and view their own forecasts and submit them to management at the appropriate reporting times. Managers can generate forecasts for sales representatives that are visible to them on the territory tree. Senior managers can view an overall forecast of all their groups by generating one high-level roll-up forecast that provides an overview of the organization's outlook.

In PeopleSoft Enterprise Sales, sales representatives, managers, and financial analysts work with sets of data determined by their user access profiles and territory tree visibility. In this way, managers in one division have access to their staff's data but not to the data of another division.

PeopleSoft Enterprise Sales forecasts are based on:

- The structure of sales territory trees.
- Opportunity details managed by sales representatives.
- Revenue and shadow forecast allocations, which reflect the percentages of opportunity activity attributed to each opportunity team member's forecast.

Revenue and Shadow Forecasts

PeopleSoft Enterprise Sales provides two forecast variants, each with a different focus:

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- Revenue forecasts are projections of an organization's opportunity activity from a financial perspective; they provide information about the amount of revenue coming into the enterprise.

  A revenue forecast is based on the opportunity team's allocation percentage. Typically, 100 percent is allocated to one sales representative on an opportunity for the purpose of revenue forecasts. However, you can distribute the allocation percentage across two or more opportunity team members. The allocation percentage for an opportunity team must total 100 percent.

  Revenue forecasts are also known as split revenues. Revenue forecast amounts are calculated by multiplying the estimated revenue amount by the team member's allocation percentage.

- Shadow forecasts are projections of an organization's opportunity activity from an operational perspective; they enable you to evaluate the performance of sales staff by comparing quotas to shadow revenue allocations.

  A shadow forecast is based on the opportunity team's shadow percentages. The shadow forecast is operational in nature. The shadow percentage for an opportunity team does not have to total 100 percent. In the event that the total is greater than 100 percent, the amount over 100 percent is double-counted.

  Shadow forecasts are also known as double counts; however, not every shadow forecast includes a double count. Shadow forecast amounts are calculated by multiplying the estimated revenue amount by the sales user's shadow percentage and then adding the shadow amount.

The following table shows three ways that you might assign revenue and shadow allocations to two representatives, SREP1 and SREP2, who are working on an opportunity. The table shows how those allocations affect corresponding forecasts:

	Opportunity 1	Opportunity 2	Opportunity 3
Customer	Lakeview Community College	Grandma's Foods	MMA Property Management
Product Group	Air Conditioners	Freezers	Refrigerators
Forecast Amount	100,000 USD	600,000 USD	1,000,000 USD
Close Date	March 31, 2001	March 31, 2001	March 31, 2001
Revenue Allocation	SREP1 = 100 percent	• SREP1 = 50 percent • SREP2 = 50 percent	• SREP1 = 100 percent • SREP2 = 0 percent

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	Opportunity 1	Opportunity 2	Opportunity 3
Shadow Allocation	SREP1 = 100 percent	• SREP1 = 50 percent • SREP2 = 50 percent	• SREP1 = 100 percent • SREP2 = 25 percent
Scenario and Forecast Results	One representative handles the deal and receives all of the credit: • 100,000 USD appears on SREP1's Revenue forecast. • 100,000 USD appears on SREP1's Shadow forecast.	Two representatives handle the deal and split the amount equally: • 300,000 USD appears on SREP1's Revenue forecast. • 300,000 USD appears on SREP2's Revenue forecast. • 300,000 USD appears on SREP1's Shadow forecast. • 300,000 USD appears on SREP2's Shadow forecast.	SREP1 owns the deal. SREP2 assists and receives partial shadow credit: • 1,000,000 USD appears on SREP1's Revenue forecast. • 0 USD appears on SREP2's Revenue forecast. • 1,000,000 USD appears on SREP1's Shadow forecast. SREP1 receives full credit toward the representative's quota. • 250,000 USD appears on SREP2's Shadow forecast. SREP2 receives partial credit toward the representative's quota for assisting with the deal.

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CHAPTER 22

Using Forecasts

This chapter provides an overview of forecast functionality in PeopleSoft Enterprise Sales and discusses how to:

- Select a forecast.
- Add and adjust forecasts.
- Generate forecasts automatically.
- Manage forecasts.
- Inactivate and lock forecasts.
- Archive and restore forecasts.

Understanding Forecast Functionality in PeopleSoft Enterprise Sales

PeopleSoft Enterprise Sales offers forecast functionality for two groups of users:

- Sales representatives can add a new forecast or adjust their own forecasts using the Search My Forecasts component.
- Sales managers can roll up, adjust, and analyze forecasts using the Search Rollup Forecasts component.

These two components use a similar interface to select a forecast.

Typically, sales managers ask sales representatives to create and adjust forecasts by a certain date. When the sales representatives are comfortable with their forecast numbers, they submit their forecasts. Alternatively, sales managers might ask sales representatives to update their opportunities, for example, by the last day of each month, and then use autoforecasting to build forecasts directly from the opportunities. In either case, the sales managers can roll up forecasts for all their sales representatives and analyze the forecast for a territory. The forecasts that roll up under a manager depend on the structure of the territory tree.

Selecting a Forecast

This section discusses how to view forecast lists.

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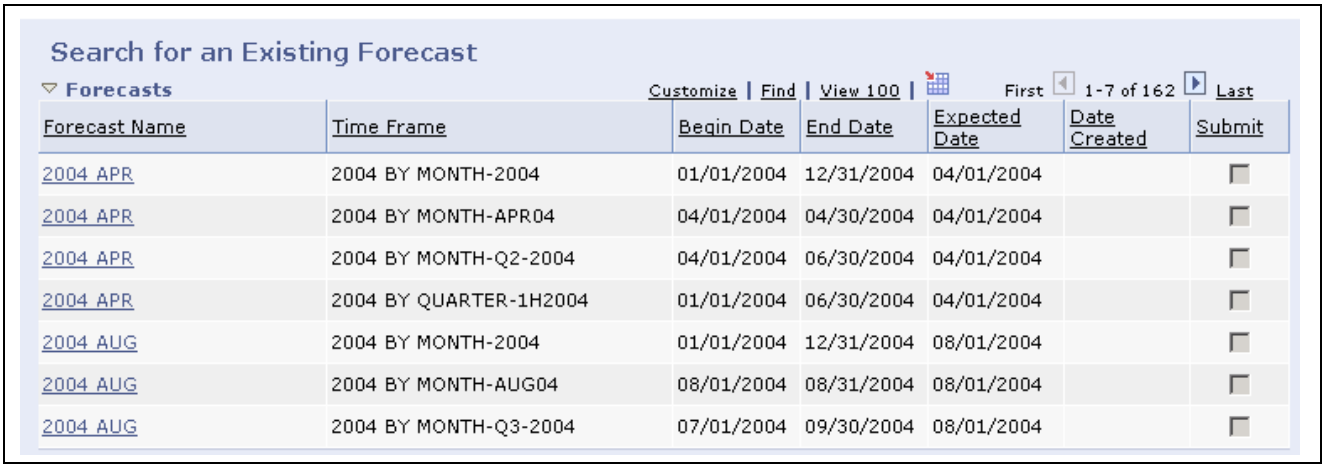
Pages Used to Select a Forecast

Page Name	Object Name	Navigation	Usage
Search for an Existing Forecast	RSF_FCAST_SEARCH	Sales, Search Rollup Forecasts	View a list of revenue or shadow forecasts. You can select a forecast to view it in more detail.
Search for an Existing Forecast	RSF_FCAST_R_SEARCH	Sales, Search My Forecasts	View a list of revenue forecasts, shadow forecasts, and empty forecasts. You can select a forecast to view it in more detail, or you can select an empty forecast for use in generating a new revenue forecast.

Viewing Forecast Lists

Access the Search for an Existing Forecast page.



Search for an Existing Forecast page (1 of 2)

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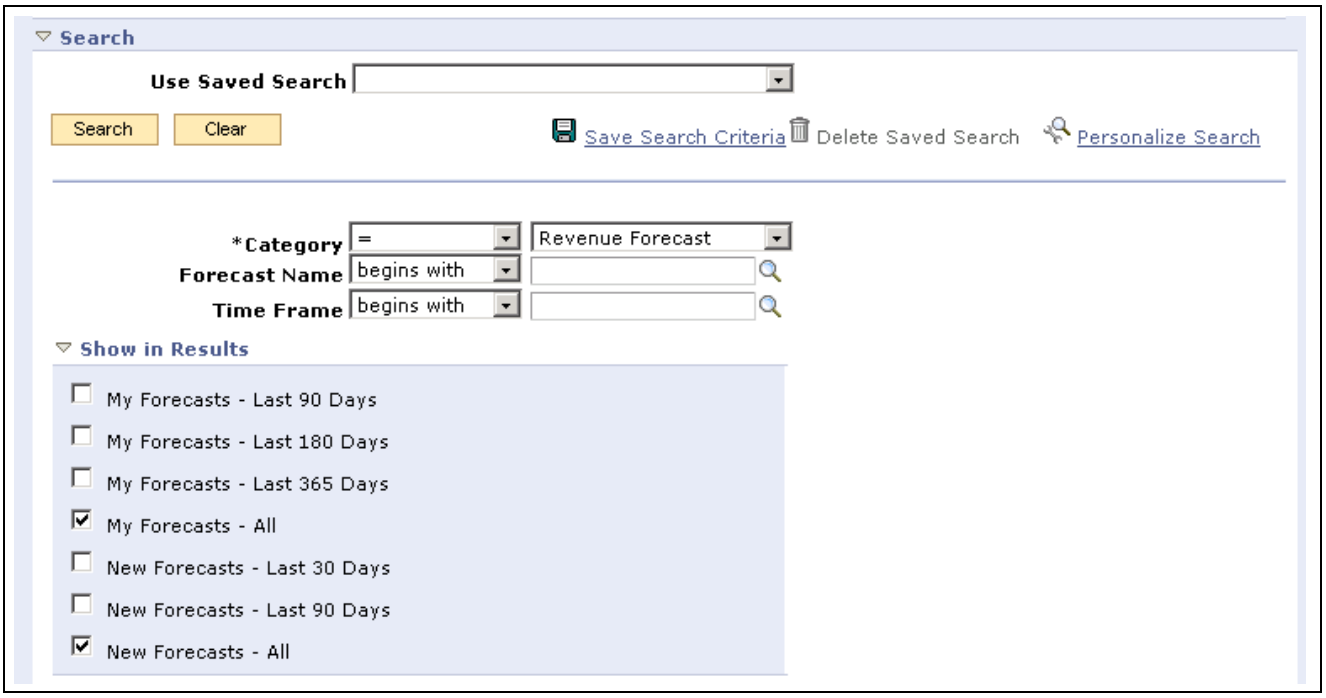

Search for an Existing Forecast page (2 of 2)

Entering Search Parameters

Select filter options in the Show in Results group box. When you click Search, the system lists the search results at the top of the page.

Category Select *Revenue Forecast* or *Shadow Forecast.*

My Forecasts Select any My Forecasts option to search for generated forecasts that contain forecast data for a sales user. These forecasts have an entry in the Date Created column.

New Forecasts Select any New Forecasts option to search for forecasts that are empty or do not have data for a sales user. Use these empty forecasts to generate a new forecast.

Note. The search results list does not separate the generated forecasts and the new forecasts. If you select options to display both types of forecasts, you can click the Date Created link to sort the empty forecasts from those that have data.

Viewing Generated Forecasts

Forecast Name Click to access the Forecast page to either view data for a generated forecast or enter data to generate a new forecast. If your access profile permits you to adjust forecasts and you have not submitted the forecast, you can also edit forecast data.

Time Frame, Begin Date, End Date, and **Expected Date** Displays values from the corresponding generated forecast or new forecast template.

Date Created Identifies the date when the forecast was generated. New forecasts that have not yet been generated and have no data do not have forecast dates.

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Submit When selected, indicates that the forecast was submitted to a manager and its detail is not editable.

Selecting a New Forecast

Select the type of forecast to create from the items that begin with the words *New Forecast* in the Show in Results group box.

Note. When you search for new forecasts, the system displays combinations of forecast names and time frames. If you have defined a forecast name but the system does not display it, check the expected start date and status of the forecast name.

See Chapter 6, "Setting Up Sales Forecasts," Defining Forecast Names, page 76.

Adding and Adjusting Forecasts

This section discusses how to:

- Add and adjust sales forecasts.
- Calculate forecast subtotals.
- Generate forecast charts.

Pages Used to Add and Adjust Forecasts

Page Name	Object Name	Navigation	Usage
Forecast	RSF_FCAST_ENTER	Sales, Search Rollup Forecasts Select a forecast.	Adjust a sales forecast that is based on an individual sales representative's revenue allocations for working opportunities.
Forecast - Subtotals	RSF_FCAST_SUMMARY	Sales, Search Rollup Forecasts Select a forecast, and then select the Subtotals tab.	Calculate and view the subtotals of a revenue forecast.
Forecast - Chart	RSF_FCAST_CHART	Sales, Search Rollup Forecasts Select a forecast, and then select the Chart tab.	Generate a chart of the revenue forecast.

Adding and Adjusting Sales Forecasts

Access the Forecast - Forecast page.

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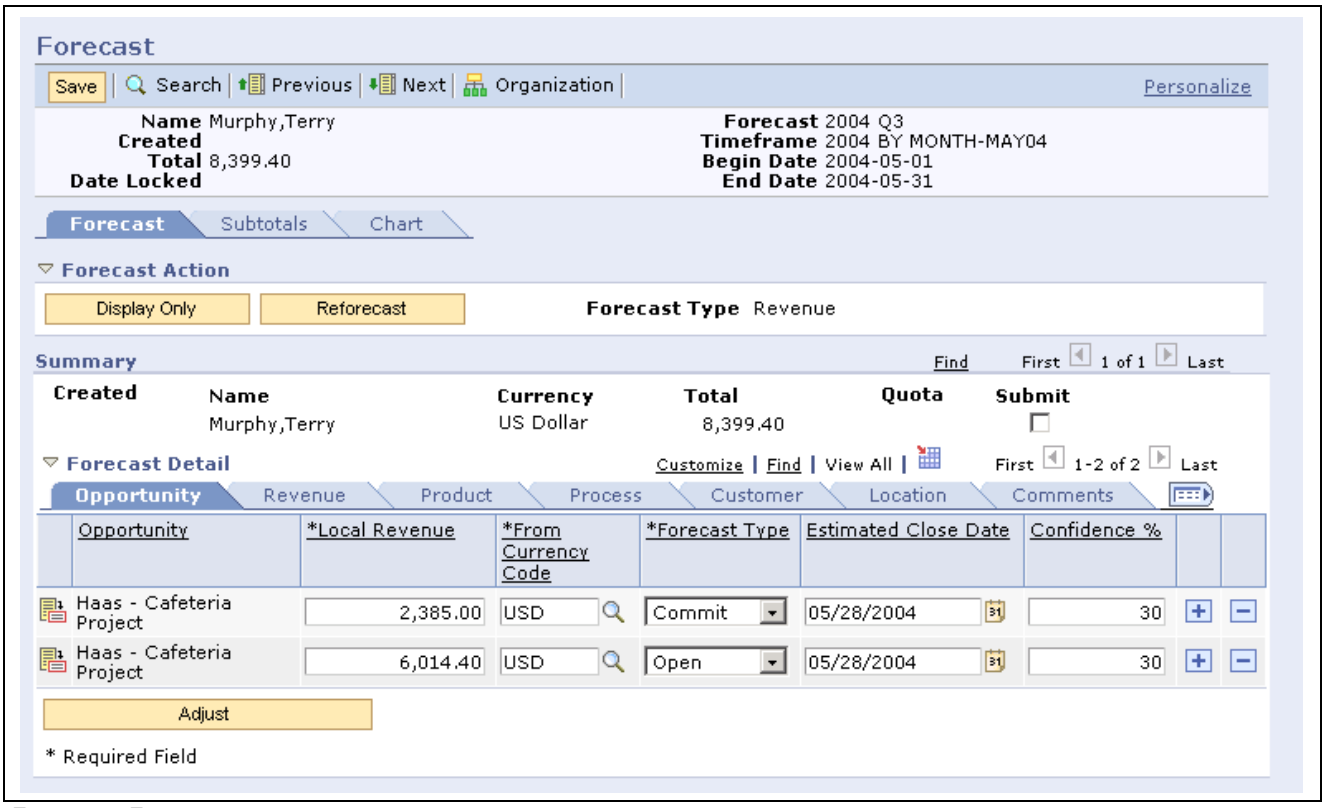

Forecast - Forecast page

This page displays the selected sales users' opportunities that have forecasted dates within the specified time frame and a status of either *Open* or *Closed - Won.* Forecasts do not include opportunities with the status *Closed - Lost* or *Inactive.*

You can view forecast data on each of the tabs on this page.

Edit Data and **Display Only** — Click the Edit Data button to access edit mode and then enter and modify data. After you access edit mode, the system renames the button Display Only. You can return to display-only mode by clicking this button. The Edit Data button is enabled only if your access profile permits you to edit forecasts.

Reforecast — Click to regenerate the forecast. This action eliminates all modifications and adjustments, and reruns the forecast based on current opportunity data. You cannot reforecast or make changes to a forecast once it is submitted.

Submit and **Submit All** — Select to submit the forecast when you save the page. Submitting a forecast makes it available to managers. Managers can view all forecasts, submitted or not, if the sales access profile is set to permit viewing unsubmitted forecasts.

You cannot make changes to a forecast once it is submitted.

Note. The Submit All check box appears only if your user profile permits you to submit multiple forecasts.

Local Revenue — Enter the amount of revenue that is anticipated from the sale.

From Currency Code — Enter the sales user's currency code.

Forecast Type — Select a user-defined forecast type.

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See Chapter 6, "Setting Up Sales Forecasts," Defining Forecast Types, page 77.

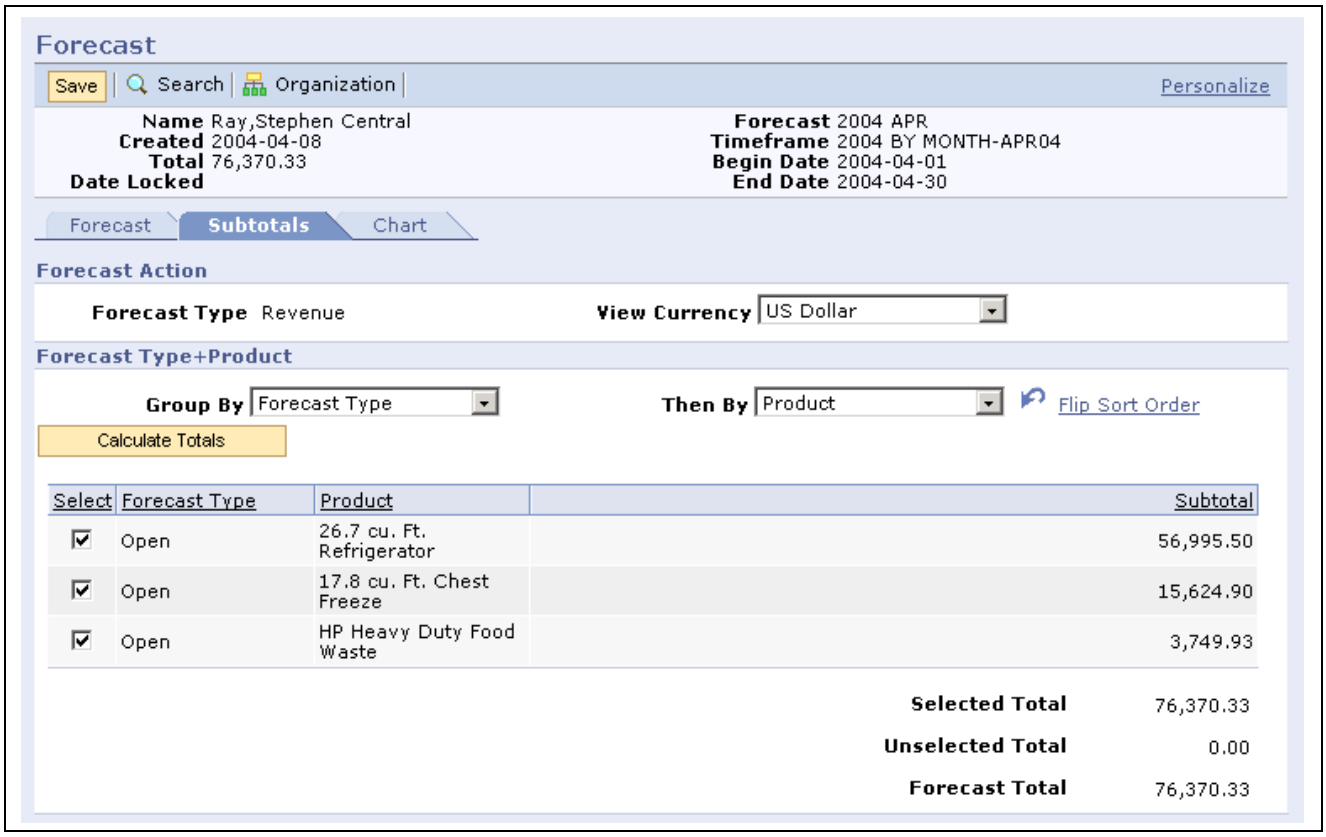
Estimated Close Date Enter the forecast estimated date that the sale will occur.

Confidence % (confidence percentage) Enter a whole number that specifies the probability that the forecast will become an actual sale.

Adjust Click to add a row and make adjustments to the sales user's forecast data. Adjustments affect the totals and are directly associated with the sales representative who makes the adjustment.

Calculating Forecast Subtotals

Access the Forecast - Subtotals page.



Forecast - Subtotals page

View Currency Select the currency in which to express the forecast amounts. The default is the sales user's default currency.

Group By and **Then By** You can use subtotals to generate and view a forecast's subsets. For example, suppose that the overall forecast is for November 2004 and you want to know the confidence levels that make up the forecast and you want to know those levels by region. In that case, you would select *Confidence %* in the Group By field and *Region* in the Then By field.

Note. You must enter a value in the Group By field to use subtotals.

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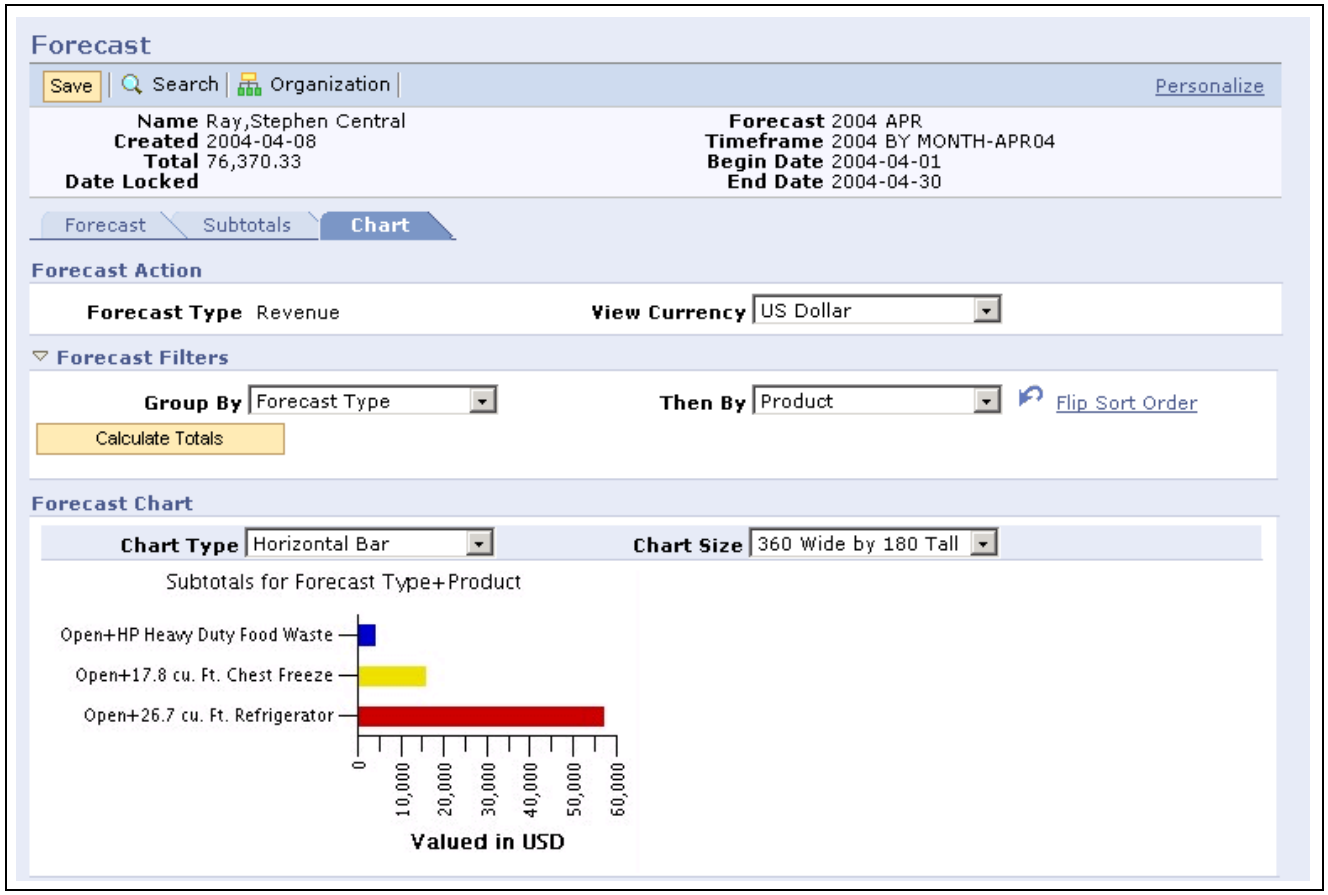
Select Select the check box next to each item that you want to group into a separate subtotal. The sum for the selected items appears as the selected total, and the sum of items that are not selected is the unselected total.

For example, if 10 rows appear and you select this check box for the first, third, and fifth rows, then the selected total is the sum of the first, third, and fifth rows. The unselected total is the sum of the seven rows that you did not select.

Generating Forecast Charts

Access the Forecast - Chart page.



Forecast - Chart page

View Currency If you specified the currency on the Subtotals page, the system carries it over to here. If you did not, specify it here.

Group By and **Then By** If you specified subtotals on the Subtotals page, the system carries them over to here. If you did not, specify them here.

Note. You must have a value in the Group By field to generate a chart.

Chart Type Specify the type of chart to generate. Values include *Bar Chart, Horizontal Bar Chart, Horizontal Stacked Bar Chart,* and *Stacked Bar Chart.*

Chart Size Specify the size of the chart.

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Generating Forecasts Automatically

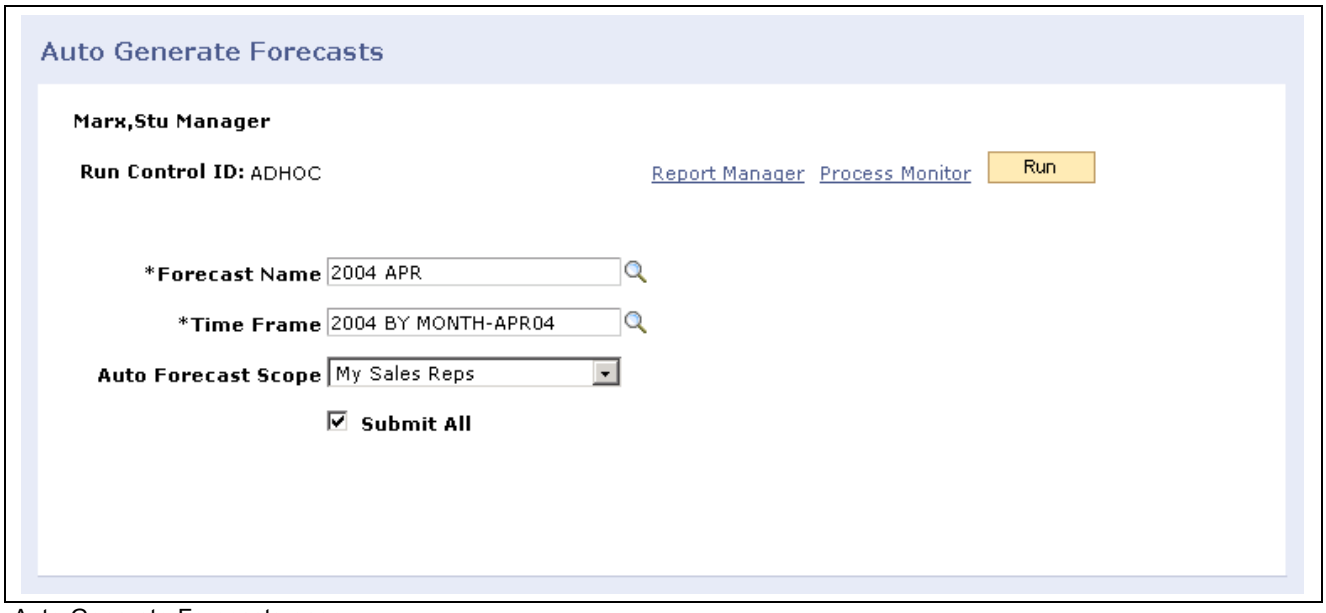
This section discusses how to automatically generate forecasts.

Page Used to Automatically Generate Revenue or Shadow Forecasts

Page Name	Object Name	Navigation	Usage
Auto Generate Forecasts	RSF_FCAST_RUN	• Set Up CRM, Product Related, Sales, Forecast, Auto Generate Revenue Forecast • Set Up CRM, Product Related, Sales, Forecast, Auto Generate Shadow Forecast	Run the Auto Generate Forecast Application Engine process (RSF_FCST) to generate revenue or shadow forecasts for direct reports or for all people who are visible to you on the territory tree.

Automatically Generating Forecasts

Access the Auto Generate Forecasts page.



Auto Generate Forecasts page

Forecast Name Enter the forecast to generate. You define forecasts on the Forecast Names setup page.

See Chapter 6, "Setting Up Sales Forecasts," Defining Forecast Names, page 76.

Time Frame Enter the time frame from which to pull data for forecasting. Define forecast time frames on the Time Frames page.

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See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Defining Holiday Schedules," Defining Holiday Schedules, Time Frames, and Sales Quota Rollups.

Auto Forecast Scope Select the data to forecast. Values are *My Sales Reps* (my sales representatives) and *All Sales Reps* (all sales representatives). Typically, sales managers can select *My Sales Reps* to automatically generate forecasts for sales representatives for whom they have visibility. However, only sales or forecast administrators can select *All Sales Reps* to automatically generate forecasts for the entire sales organization.

Submit All Select to submit all of the automatically generated forecasts to manager visibility, in which case the sales representative cannot modify the forecasts.

When cleared, the forecasts remain unsubmitted and available for editing, adjusting, and reforecasting.

After running the autogenerate process, select the autogenerated forecasts on the Forecast page in the Search Rollup Forecasts component to review and adjust them. Autogenerated forecasts are useful for determining sales representatives' revenue activities at a given time. However, autogenerated forecasts might not represent a true picture of a reporting period unless you are sure that sales representatives updated their opportunities and revenue projections before you ran the process.

Note. You can also autogenerate forecasts from the Forecast page in the Search Rollup Forecasts component by clicking the Auto Forecast button there. When using the button on the Forecast page, the system lists the autogenerated forecasts on that page, where you can view and adjust them.

Managing Forecasts

This section discusses how to:

- Select the forecast action.
- Roll up and analyze forecasts.
- Analyze forecast subtotals.
- View details of all forecasts.

Note. Usually, access to the Search Rollup Forecasts component is limited to managers. Depending on access profile limitations, you may not be able to view these menu options and page fields. The views available to a manager depend on the setting of the CORE_RSF_FCAST_SIMPLE functional option.

See Also

Chapter 4, "Setting Up Sales Security and Personalization," Setting Up Sales Access Profiles, page 15

Chapter 4, "Setting Up Sales Security and Personalization," Setting Up Functional Options, page 27

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Pages Used to Manage Forecasts

Page Name	Object Name	Navigation	Usage
Forecast	RSF_FCAST_REVIEW	Sales, Search Rollup Forecasts Select *Manager Review* as the forecast view.	Manage and review forecasts.
Forecast	RSF_FCAST_ALLS	Sales, Search Rollup Forecasts Select *Combined Forecasts* as the forecast view.	Edit and review forecast details.
Forecast	RSF_FCAST_SUMMARY	Sales, Search Rollup Forecasts Select *Subtotals* as the forecast view.	Analyze forecast subtotals.
Select Columns to Display	RSF_FCAST_FILTER	Sales, Search Rollup Forecasts Select *Subtotals* as the forecast view. Select Set Filters.	Select filters for data to display for the subtotals view.
Forecast	RSF_FCAST_CHART	Sales, Search Rollup Forecasts Select *Chart* as the forecast view.	Display summary data on a chart.

Selecting the Forecast Action

Access the Forecast page.

Forecast View Select a view for the page. Values are *Charts, Combined Forecasts, Interactive Reports, Manager Review,* and *Subtotals.*

See Appendix A, "Understanding Sales Interactive Reports," page 267.

View as Enter a sales user for the forecast view.

Forecast of Select either *Forecast* or *Shadow.*

View Currency Select the currency in which to express the forecast amounts. The default is the sales user's default currency.

Rolling Up and Analyzing Forecasts

Access the Forecast page.

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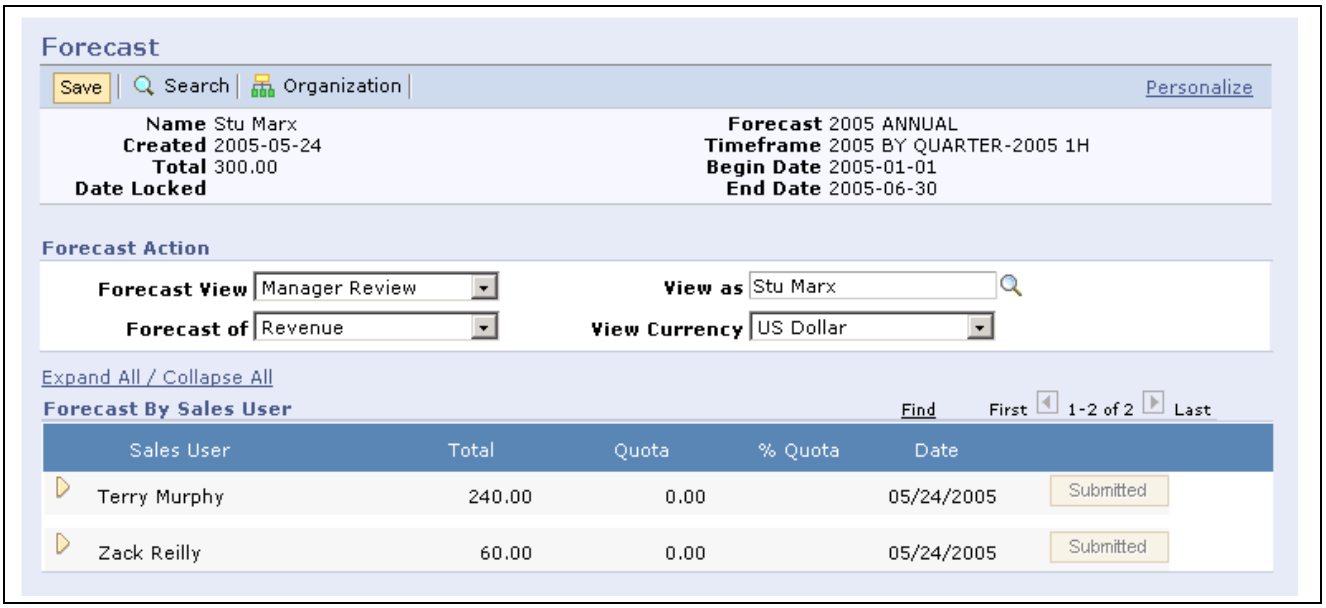
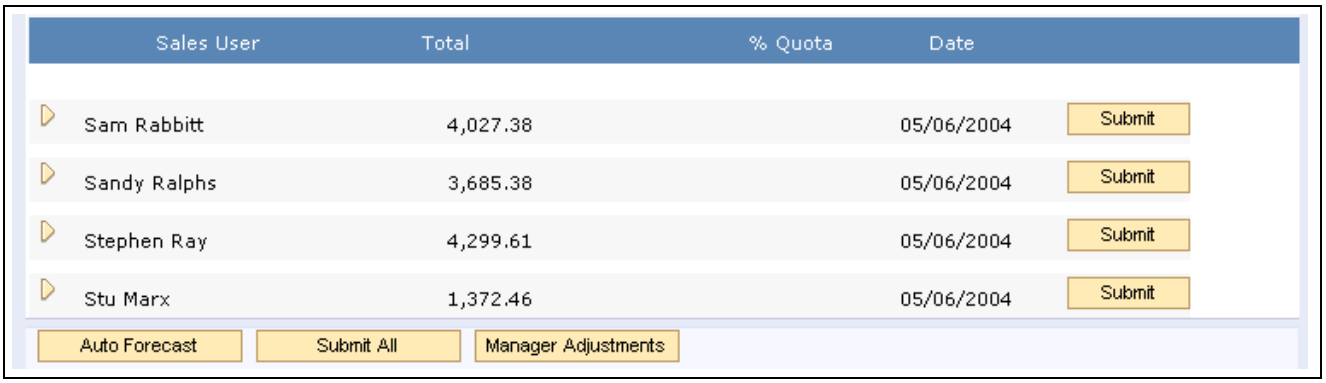


Forecast: Manager Review page (1 of 2)



Forecast: Manager Review page (2 of 2)

Select *Manager Review* as the forecast view.

Note. The system displays forecast amounts in the default currency of the sales user who accesses the forecast, not in the default currencies of the sales users whose forecasts are listed.

Expand All / Collapse All Click this link to display forecast details and view or adjust data for all sales users who are listed on the page. If the details are displayed, click this link to hide forecast details for all sales users.

Note. You can display or hide the details for an individual sales user by clicking the triangle next to the user.

Submit Click this button for each forecast that you want to submit. After you have submitted the forecast for a sales user, the Submit button becomes unavailable and changes to Submitted. A submitted forecast cannot be edited.

Revenue Enter the amount of revenue that is anticipated from the sale.

Currency Enter the currency code.

Forecast of Select a user-defined forecast type.

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See Chapter 6, "Setting Up Sales Forecasts," Defining Forecast Types, page 77.

Forecast Date Enter the estimated date that the sale will occur.

Conf % (confidence percentage) Enter a whole number which specifies the probability that the forecast will became an actual sale.

Adjust <sales user> Click this button to add a row and make adjustments to a particular sales user's forecast data if it has not previously been submitted.

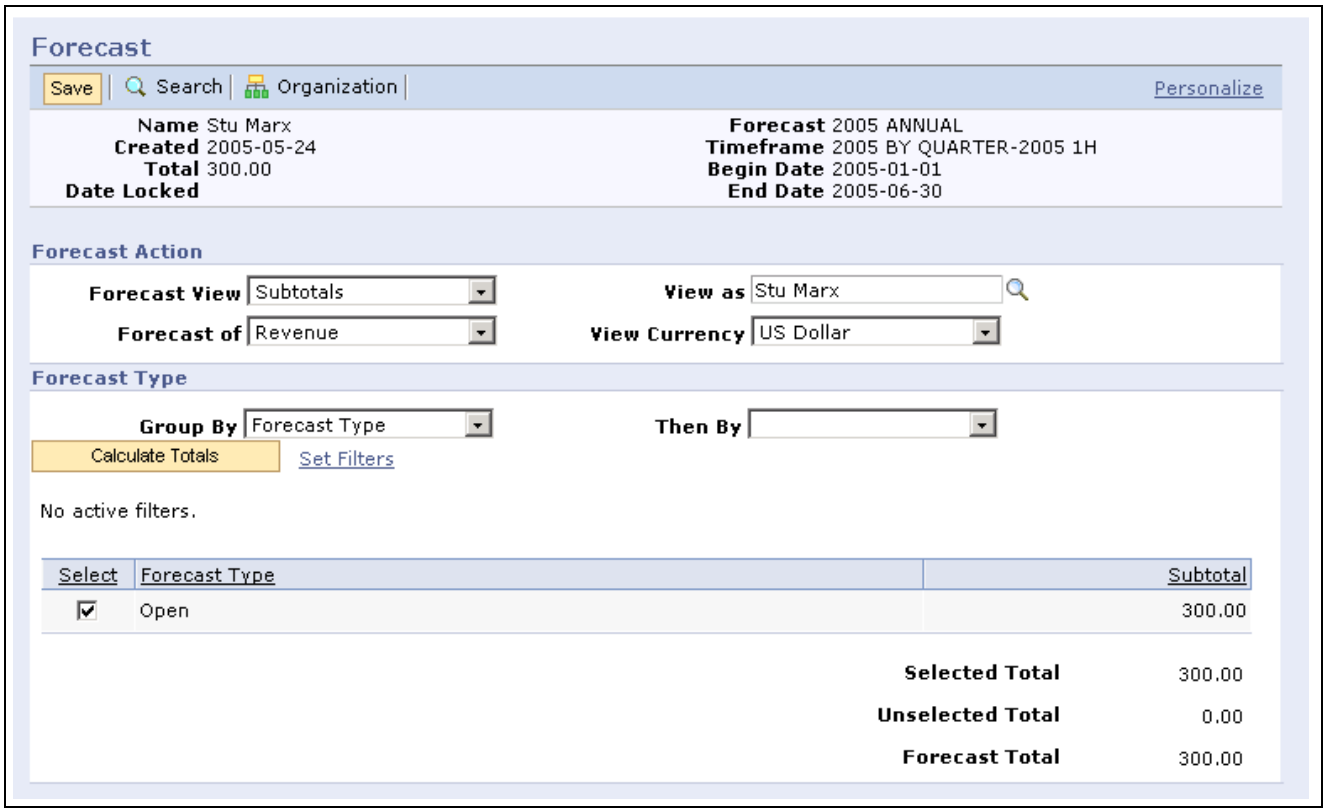
Auto Forecast Click to generate a forecast for each direct report who has opportunity activity but does not already have a forecast listed. You cannot automatically generate the same forecast for an individual more than once.

Submit All Click to submit all forecasts. You cannot edit forecasts after they have been submitted.

Manager Adjustments Click this button to add a row and make adjustments to the overall forecast total. The system inserts manager adjustments under the manager's name.

Analyzing Forecast Subtotals

Access the Forecast page.



Forecast page

Select *Subtotals* as the forecast view.

Group By and **Then By** You can use subtotals to generate and view a forecast's subsets. For example, suppose that the overall forecast is for November 2004 and you want to know the confidence levels that make up the forecast and you want to know those

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levels by region. In that case, you would select *Confidence %* in the Group By field and *Region* in the Then By field.

Note. You must enter a value in the Group By field to use subtotals.

Calculate Totals After you have selected the subtotal groupings, click this button to calculate the subtotals for the groupings.

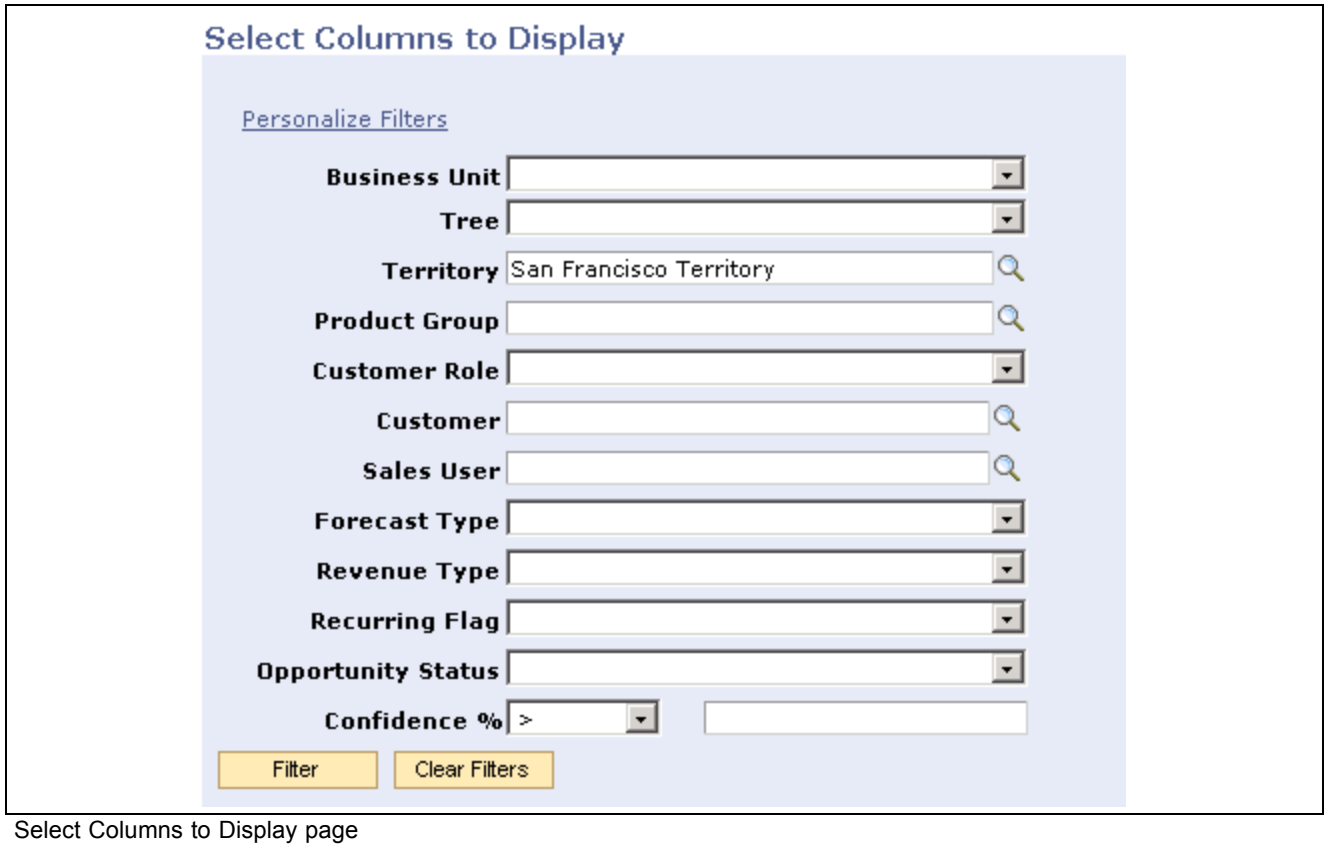
Set Filters Click this link to access the Select Columns to Display page, where you can filter the data to be displayed.

Select Select the check box next to each item that you want to group into a separate subtotal. The sum for the selected items appears as the selected total, and the sum of items that are not selected is the unselected total.

For example, suppose that 10 rows appear and you select this check box for the first, third, and fifth rows. The selected total is the sum of the first, third, and fifth rows, and the unselected total is the sum of the seven rows that you did not select.

Filtering Data

Access the Select Columns to Display page.



Select Columns to Display page

After you select values to use as filters for the data displayed for the subtotals view, click the Filter button to filter the data. You can choose to use other available filters by clicking the Personalize Filters link.

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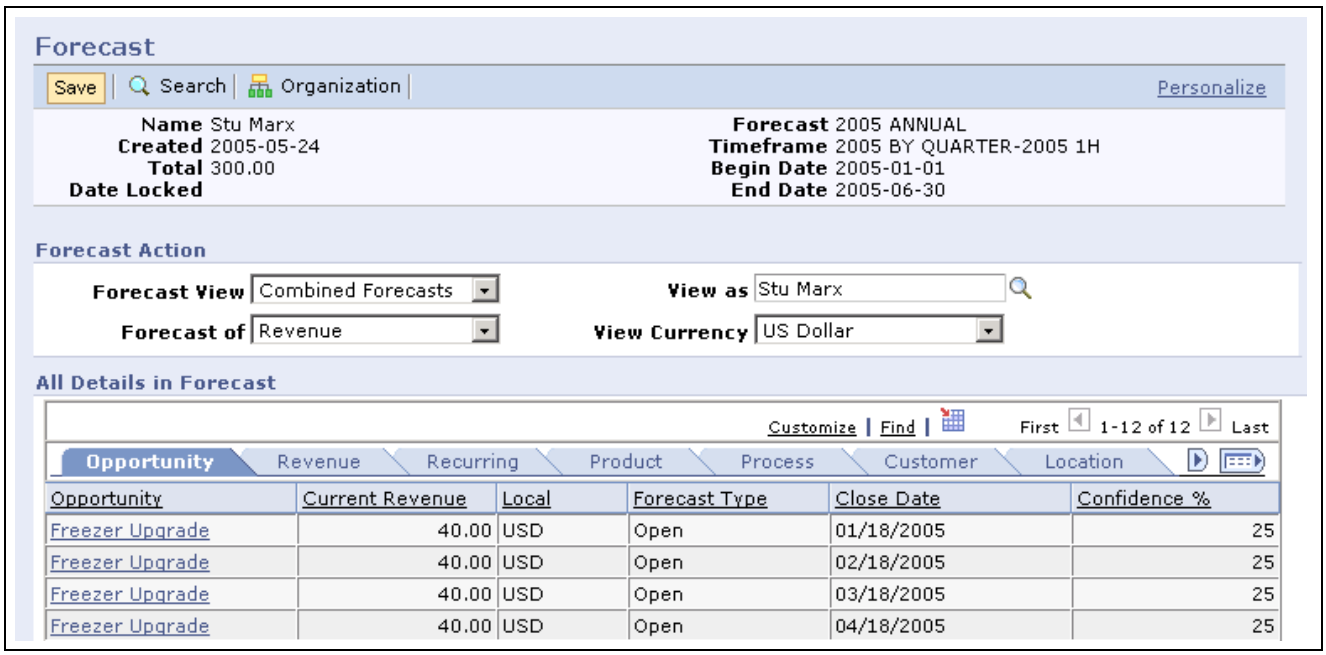
Viewing Details of All Forecasts

Access the Forecast page.



Forecast page

Select *Combined Forecasts* as the forecast view.

This view enables the manager to see information for all the sales users' opportunities. The manager can sort the data to view, for example, the opportunities with the highest revenue. Also, the manager can click the Download button to download the opportunities to a spreadsheet.

Inactivating and Locking Forecasts

This section discusses how to inactivate and lock sales forecasts.

Page Used to Inactivate and Lock Forecasts

Page Name	Object Name	Navigation	Usage
Maintain Forecast	RSF_FCAST_MAINT	Set Up CRM, Product Related, Sales, Forecast, Lock Forecast	Inactivate and lock sales forecasts.

Inactivating and Locking Sales Forecasts

Access the Maintain Forecast page.

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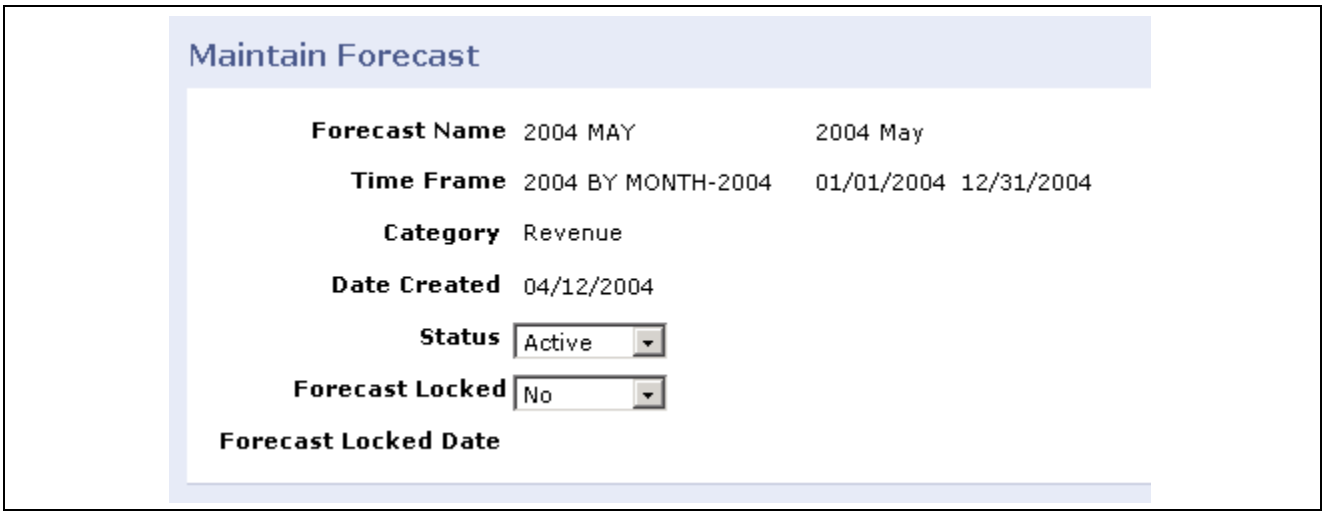

Maintain Forecast page

Warning! You cannot unlock a forecast once it is locked.

Status Select *Inactive* to inactivate the forecast. You can only access an inactive forecast on the Maintain Forecast page. You cannot view or modify an inactive forecast or include it in a forecast summary, rollup, or report.

You can reactivate a forecast at any time.

Forecast Locked Select *Yes* to lock the forecast. On a locked forecast, you cannot:

- Edit
- Adjust rows
- Autoforecast
- Reforecast

A locked forecast remains visible unless you inactivate it. You cannot derive forecast summaries, rollups, reports, or other objects from locked forecasts.

Locked forecasts are permanently unavailable for editing. When you lock a forecast, you freeze the currency conversion rates for that forecast.

Archiving and Restoring Forecasts

This section discusses how to archive and restore forecasts.

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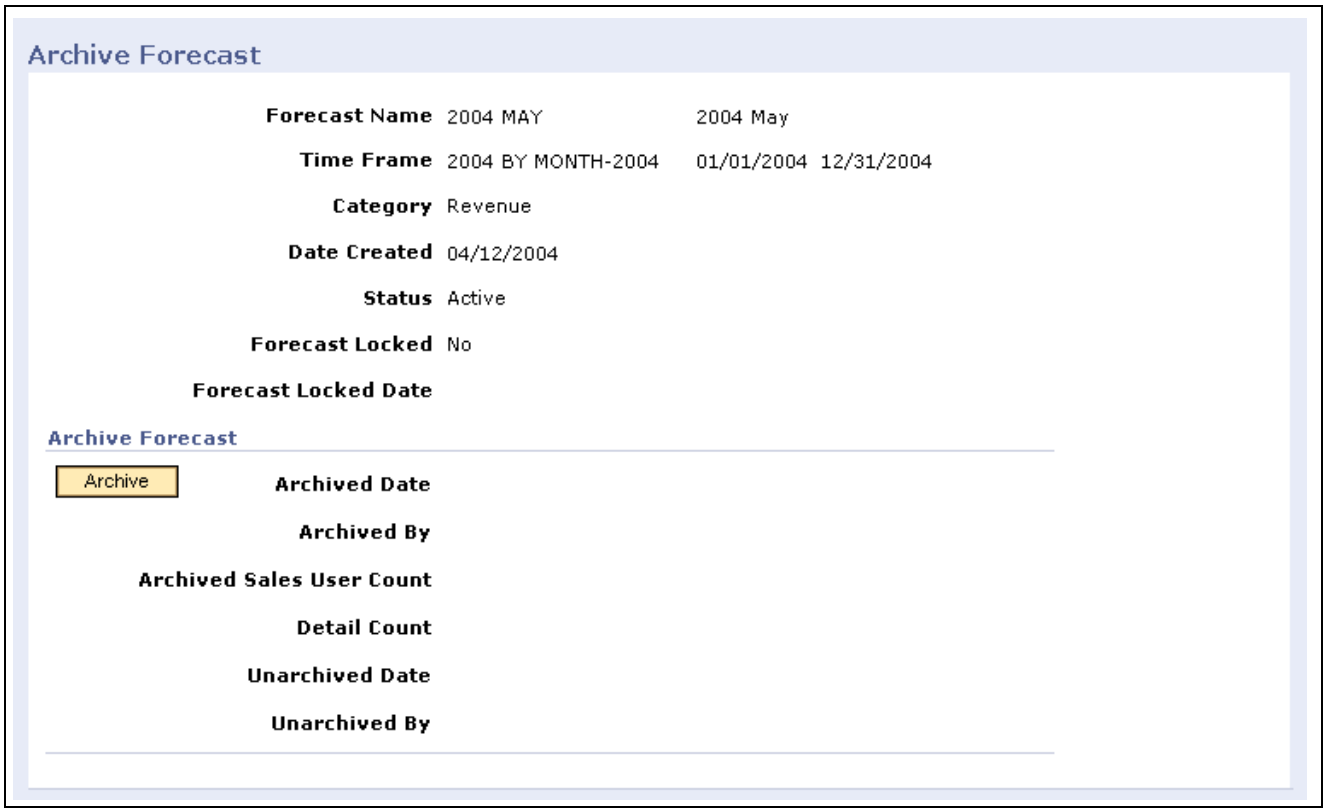
Pages Used to Archive and Restore Forecasts

Page Name	Object Name	Navigation	Usage
Archive Forecast	RSF_FCAST_ARCH	Set Up CRM, Product Related, Sales, Forecast, Archive Forecast	Archive a forecast.
Unarchive Forecast	RSF_FCAST_UNARCH	Set Up CRM, Product Related, Sales, Forecast, Unarchive Forecast	Restore an archived forecast.

Archiving and Restoring a Forecast

Access the Archive Forecast page.



Archive Forecast page

To increase system performance, you can periodically archive forecasts. Archiving maintains forecasts in duplicate sets of forecast data tables, enabling the system to access current forecasts faster than it can if all forecasts remain in the original table. You can restore a forecast after it is archived.

Archive

Click to archive the forecast. You can only access an archived forecast on the Unarchive Forecast page. You cannot view or modify an archived forecast or include it in a forecast summary, rollup, or report.

When you archive a forecast, you move it from the original tables (the tables where you create and edit forecasts) to the archiving tables. The system is able to process unarchived forecasts faster from these tables. All archived forecasts have a status of *Inactive.*

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Archived Date	Displays the date when you click Archive to archive the forecast.
Archived By	Displays the name of the logged-in user when you click Archive to archive the forecast.
Archived Sales User Count	Displays the total number of sales users that included in the sales forecast.
Archived Detail Count	Displays the total number of opportunity details in the sales forecast.

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PART 5

Working with Customer Accounts

Chapter 23
Working with Customer Accounts

CHAPTER 23

Working with Customer Accounts

This chapter provides an overview of customer accounts and discusses how to:

- Flatten customer hierarchies.
- Manage customer accounts.

Understanding Customer Accounts

PeopleSoft Enterprise Sales enables you to plan and manage customer accounts. Before you can use the account functionality, you must define a company or consumer business object.

Use PeopleSoft Strategic Account Planning if you need more robust functionality for account management. Strategic Account Planning enables you to plan and manage complex accounts for customers, sites, and partners.

See Also

Chapter 4, "Setting Up Sales Security and Personalization," page 13

Flattening Customer Hierarchies

When you sell products and services to several subsidiaries or locations of a company, you might establish a different sales account and sales team for each. In PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM), each object that represents an entity of a customer company can have its own account information. The objects are related in a customer hierarchy that is often complex and time-consuming to navigate.

The Flatten Customer Hierarchy process (RB_CUST_FLAT) captures all of the parent and child customer relationships and consolidates the data in a table that is optimized for quick searches on the My Accounts page. The data that you can view on the My Accounts page and on the Account page in the Company component is determined by the flattener process as well as account access profiles and data-distribution rules for roles.

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Page Used to Flatten Customer Hierarchies

Page Name	Object Name	Navigation	Usage
Customer Access Update	RB_CUST_FLAT_RUN	Customers CRM, Flatten Customer Hierarchy	Run the Flatten Customer Hierarchy process to structure account data and provide easy access.

Managing Accounts

This section discusses how to:

- Access accounts. (An Account is not always a customer. An account could be company, consumer, site or Partner.
- Assign representatives to accounts.
- Create account plans.

Pages Used to Manage Accounts

Page Name	Object Name	Navigation	Usage
My Accounts	RD_ACCOUNTS	My Accounts	View a list of customer accounts, and select accounts to view in detail.
Company - Account Team, Person (Individual Consumer) - Account Team	RD_ACCOUNT_TEAM	Select a customer on the My Accounts page.	Assign the account team for a customer.
Account Plan	RSP_PLANNING	• My Accounts Select one or more accounts and click the Create Plans for Selected Accounts button. • Access the Plans page in the Company, Site, Person (Individual Consumer), or Partner Company components. Click the Create Plan button.	Create an account plan.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Company Business Objects"

Accessing My Accounts Page

Access the My Accounts page.

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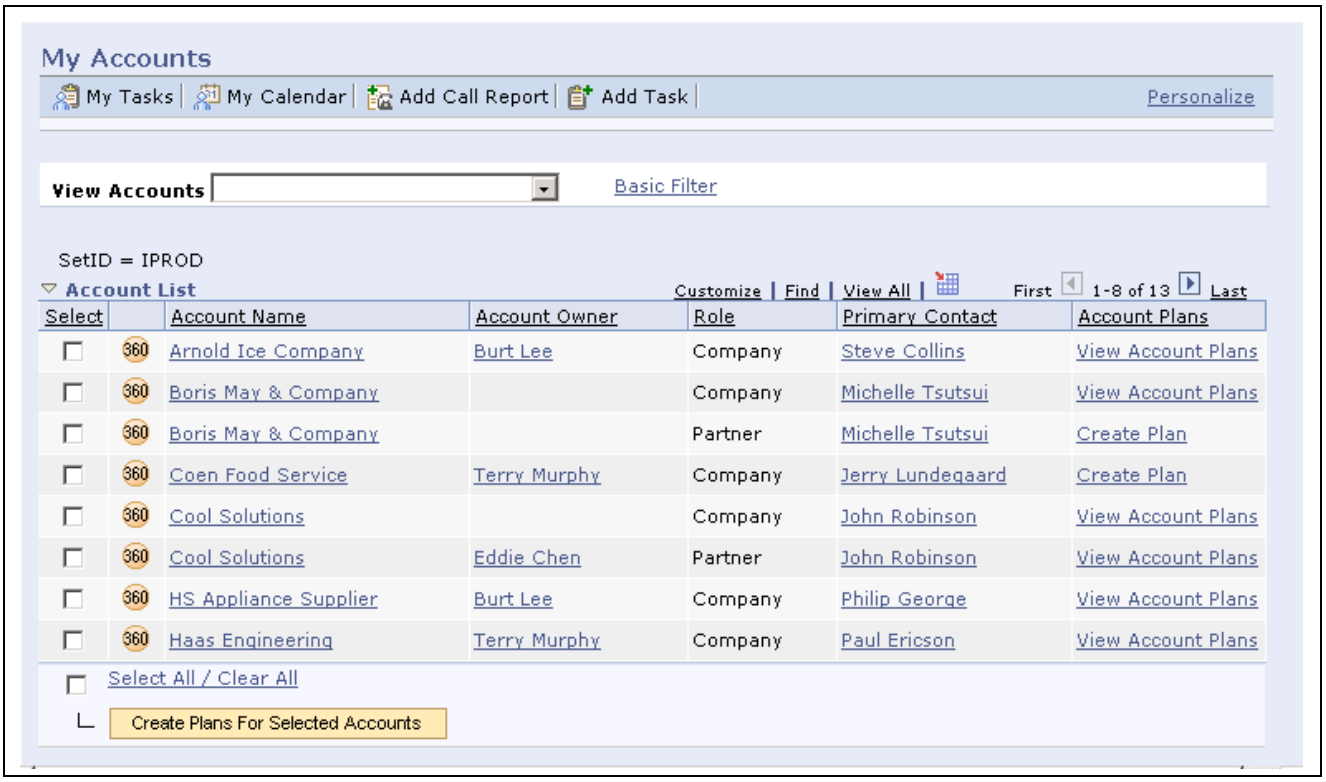
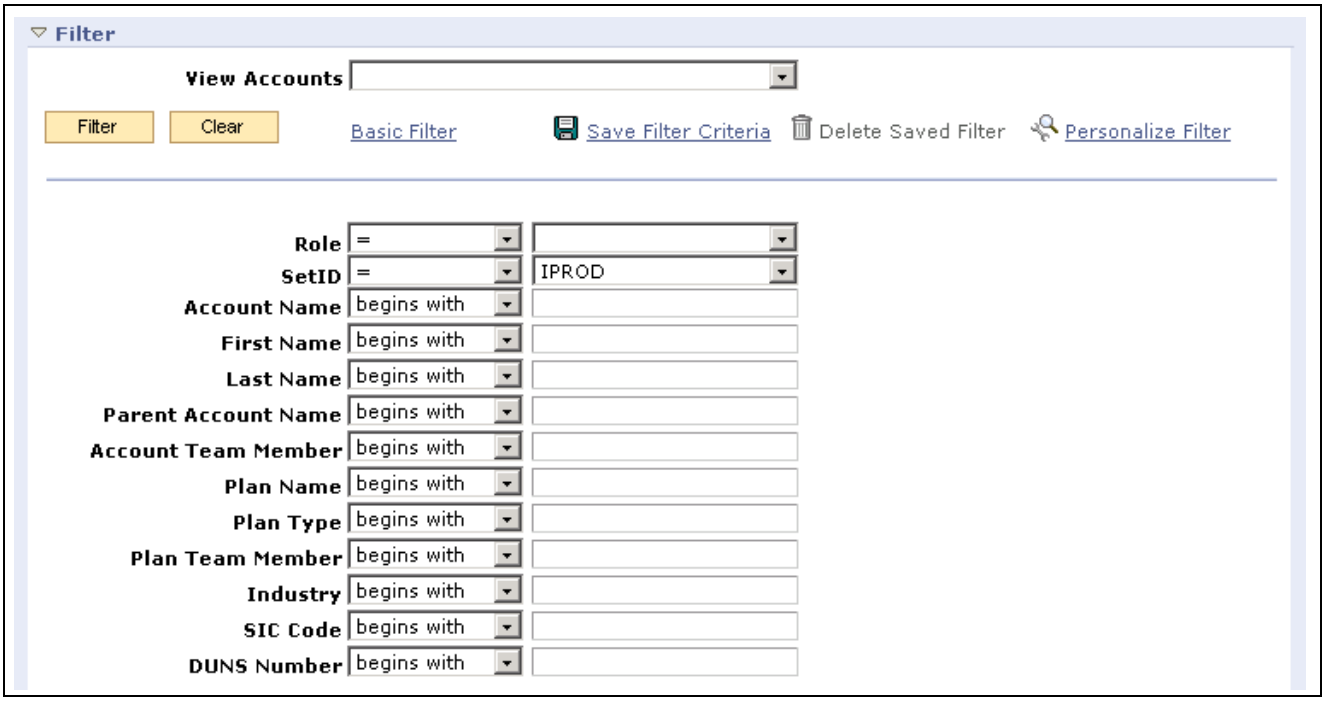


My Accounts page (1 of 3)



My Accounts page (2 of 3)

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My Accounts page (3 of 3)

Basic Filter and **Advanced Filter**

Click the Basic Filter link to access the account list alphabetically. When you click this link, an index appears on the page, and you can click a letter to jump to the accounts that begin at that index. The default basic index is alphabetic. You can change this at system setup time.

Click the Advanced Filter link to search for accounts using search criteria. When you click this link, the Filter and Show in Results page sections appear for you to specify search criteria. You have the option of naming and saving an advanced search.

The Basic Filter and Advanced Filter links act as toggles; that is, either the basic or advanced filter criteria are accessible, but not both at the same time.

Create Plans for Selected Accounts

Click this button to create plans for the accounts you selected from the account list. When creating plans for multiple account, The selected accounts must have same Role and SetID.

View Accounts

Select a saved search by which to filter the account list.

Show in Results

Select the following check boxes to specify the accounts that the system displays when you perform a search.

Note. The check boxes available in the Show in Results section depend on how you set the configurable search options.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Configuring Search Pages”.

Accounts as Plan Owner

Select to display accounts for which you are the plan owner.

Accounts as Manager

Select to display accounts for which you are the manager.

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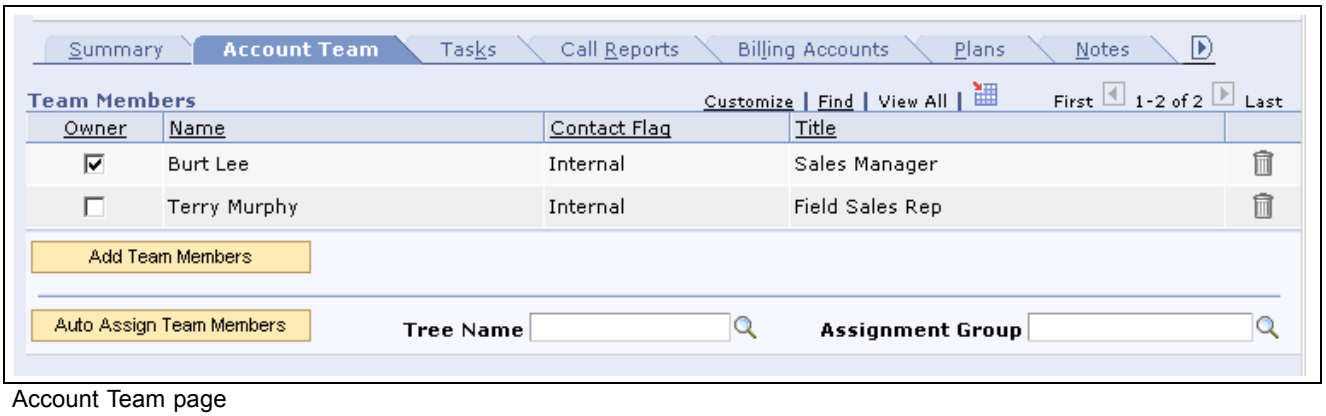
Accounts as an Owner	Select to display accounts for which you are the owner.
Accounts as Plan Team Member	Select to display accounts for which you are a member of the plan team.
Accounts as Team Member	Select to display accounts for which you are a team member.
Customers as Lead Team Member	Select to display customer accounts that are associated with a lead on which you are a team member.
Customers as Oppy Team Member (customers as opportunity team member)	Select to display customer accounts that are associated with an opportunity on which you are a team member.
Partners as Lead Team Member	Select to display partner accounts that are associated with a lead on which you are a team member.
Partners as Oppy Team Member (partners as opportunity team member)	Select to display partner accounts that are associated with an opportunity on which you are a team member.
Sites as Lead Team Member	Select to display site accounts that are associated with a lead on which you are a team member.
Sites as Oppy Team Member (sites as opportunity team member)	Select to display site accounts that are associated with an opportunity on which you are a team member.
Accounts as Temporary Assignee	Select to display accounts on which you are a temporary assignee.
View All Accounts	Select to display all accounts.

Assigning Team to an Account

Access the Account Team page for a company or consumer.



Account Team page

Click Add Team Members to manually add sales representatives to the account team or Auto Assign Team Members to have the system automatically assign the team members using predefined assignment criteria.

You must have one of these roles to maintain account teams:

- Account Administrator
- Account Manager

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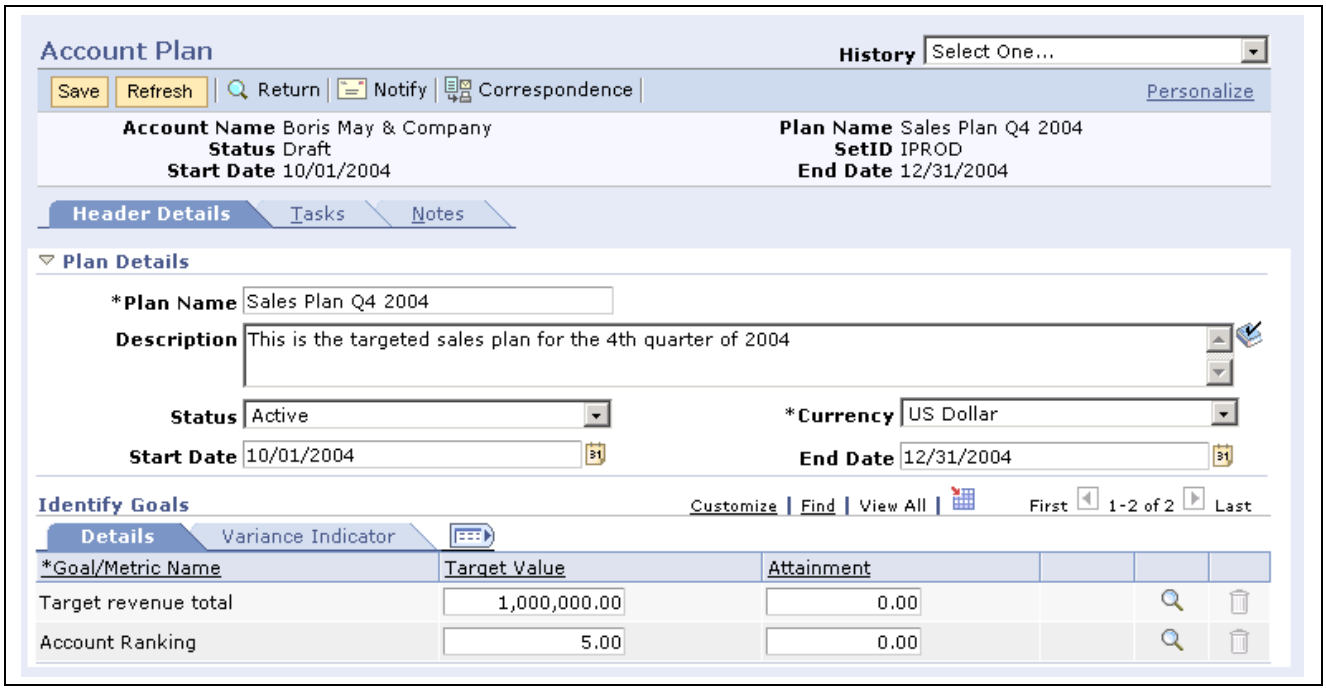
- UPG_ALLPAGES

See Also

Chapter 7, “Configuring Assignment Criteria,” page 81

Creating Account Plans

Access the Account Plan page.



Account Plan page

Plan Name Enter a name for the plan.

Description Enter a description for the plan.

Status Select a status for the plan. Values are *Active* and *Inactive*.

Currency Select a currency for the plan.

Start Date Enter the start date for the plan.

End Date Enter the end date for the plan.

Goal Name Displays a goal name for the plan.

Target Value Enter the expected value for the goal.

Attainment Enter the actual value for the goal.

See Also

PeopleSoft Enterprise Strategic Account Planning 9 PeopleBook, “Oracle’s PeopleSoft Enterprise CRM Strategic Account Planning Preface”

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APPENDIX A

Understanding Sales Interactive Reports

This appendix provides an overview of interactive reports and discusses how to launch and work with forecast interactive reports.

Understanding Interactive Reports

Interactive reports are a high-level implementation of the Analytic Calculation Environment (ACE). Interactive reports do not require an analytic logic server or a separate database to store data. These reports are dynamic, interactive analytic reports that enable you to view and organize data in a wide variety of ways for analysis of forecast activity.

Looking at reports from different perspectives affords an opportunity to gather valuable information about your business. You can save interactive reports, export them to Microsoft Excel for further analysis, and print them.

You run interactive reports for PeopleSoft Enterprise Sales by using the Forecast component. They are in-context views that are driven directly from the particular forecast ID. These reports are multidimensional, displaying operational data such as revenue by region and sales representative. You can rearrange data elements on a report, filter the data in various ways, and use different dimensions to view data. You can also compare forecasts for the same time period. The changes that you make to the online report do not affect the PeopleSoft Customer Relationship Management database where the data is stored.

Interactive reports run in separate windows. User roles and access profiles control access to forecasts and, consequently, to interactive PeopleSoft Enterprise Sales reports.

PeopleSoft Enterprise Sales provides two types of interactive reports:

- Forecast summary reports, which enable you to view previously created forecasts organized by sales representative, territory, region, and business unit.
- Forecast comparison reports, which enable you to select and compare any two forecasts for the same time period, showing the variance and revenue line items that were added or omitted in the forecasts.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Using Interactive Reports"

Launching and Working with Forecast Interactive Reports

This section discusses how to:

- Generate interactive reports.

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- Work with the Forecast Summary report.
- Work with the Forecast Comparison interactive report.

Pages Used to Launch and Work with Forecast Interactive Reports

Page Name	Object Name	Navigation	Usage
Forecast: Interactive Reports	RSF_FCAST_SAI	Sales, Search Rollup Forecasts Select *Interactive Reports* as the Forecast View. Select a Forecast of value.	Generate an interactive report summary of a revenue forecast or compare the current forecast to a previous forecast for the same time frame.
Forecast Summary	RS_FCAST_BU	Select a Forecast Type. Click the Launch Interactive Report button in the Forecast Summary group box.	Work with a forecast summary report.
Forecast Comparison	RSF_FCAST_COMP	Select a Forecast Type. Click the Launch Interactive Report button in the Forecast Comparison group box.	Work with the forecast comparison report.

Generating Interactive Reports

Access the Forecast page.

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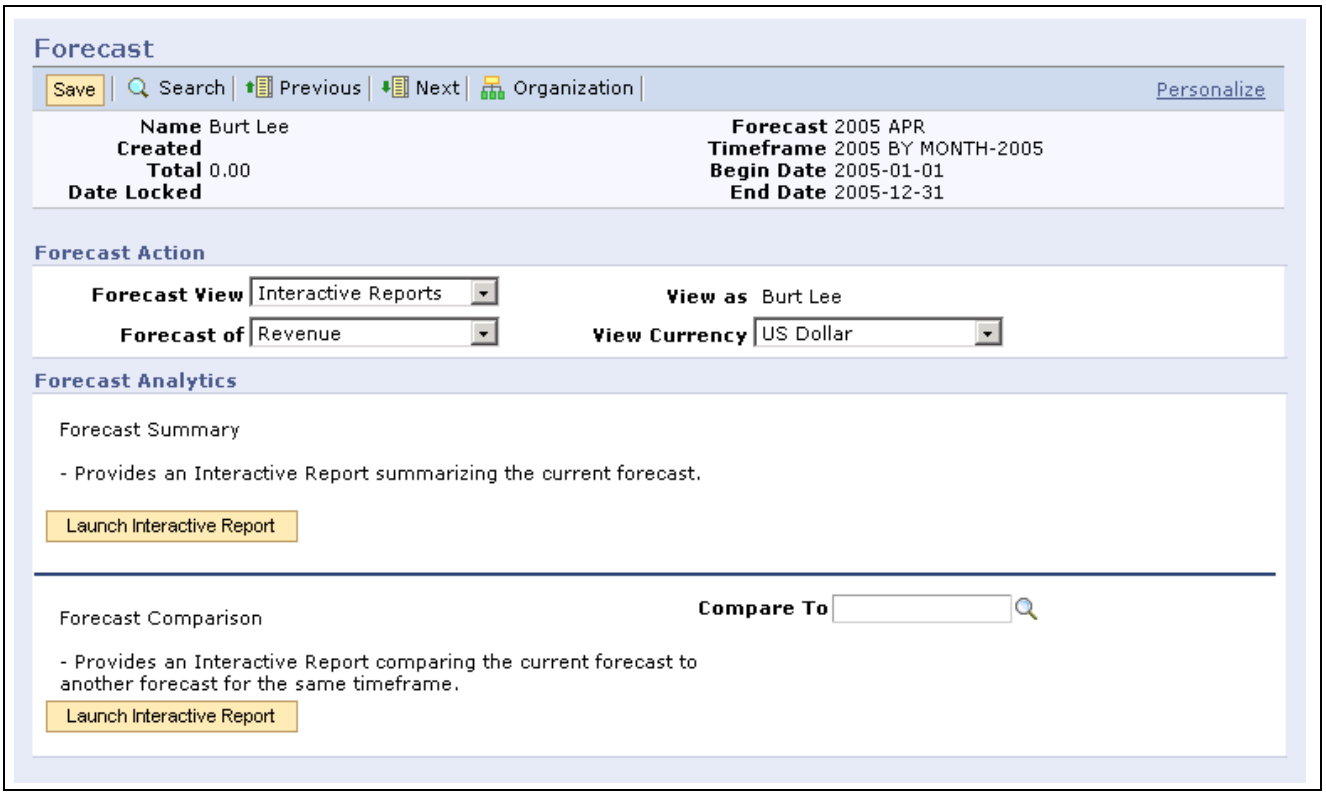


Forecast: page

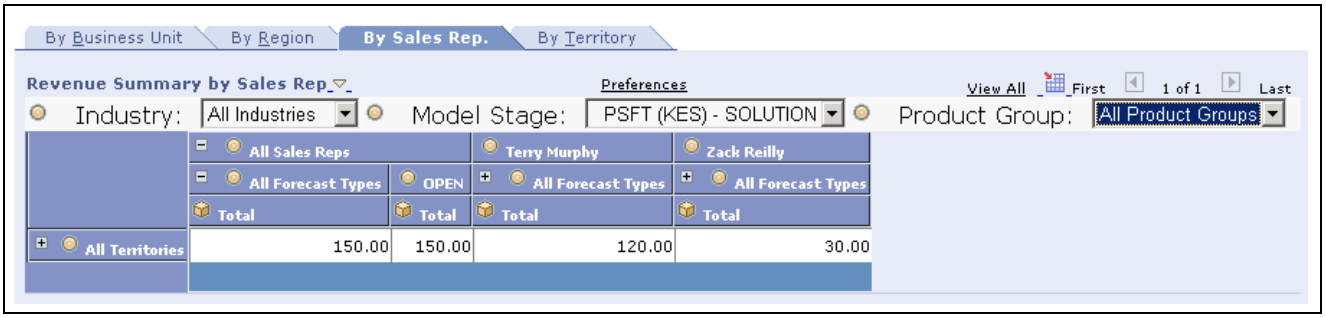
Forecast of Select *Revenue* or *Shadow.*

Note. You can use interactive reports only if the functional option CORE_RSF_FCAST_SIMPLE is set to full functionality.

See Chapter 4, "Setting Up Sales Security and Personalization," Setting Up Functional Options, page 27.

Working with the Forecast Summary Report

Access the Forecast Summary page.



Forecast Summary page

Select a dimension to view and analyze the forecast data from different perspectives. Within each dimension, you can organize the data by industry, model stage, or product group and drill down on various dimensions.

Industry and **Product Group** The options for each of these fields are based on the industries and product groups.

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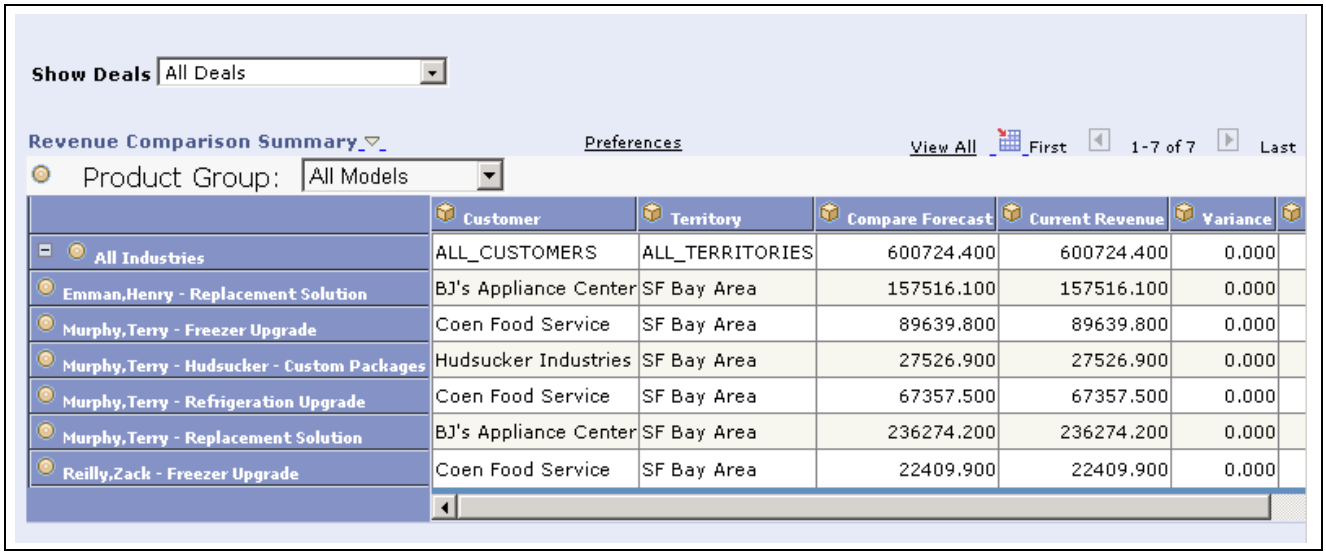
Model Stage Select the stage in the sales process for which you want to view data.

Working with the Forecast Comparison Interactive Report

Access the Forecast Comparison Summary page.



	Customer	Territory	Compare Forecast	Current Revenue	Variance
All Industries	ALL_CUSTOMERS	ALL_TERRITORIES	600724.400	600724.400	0.000
Emman,Henry - Replacement Solution	BJ's Appliance Center	SF Bay Area	157516.100	157516.100	0.000
Murphy,Terry - Freezer Upgrade	Coen Food Service	SF Bay Area	89639.800	89639.800	0.000
Murphy,Terry - Hudsucker - Custom Packages	Hudsucker Industries	SF Bay Area	27526.900	27526.900	0.000
Murphy,Terry - Refrigeration Upgrade	Coen Food Service	SF Bay Area	67357.500	67357.500	0.000
Murphy,Terry - Replacement Solution	BJ's Appliance Center	SF Bay Area	236274.200	236274.200	0.000
Reilly,Zack - Freezer Upgrade	Coen Food Service	SF Bay Area	22409.900	22409.900	0.000

Forecast Comparison Summary page

This summary compares the current forecast for a time frame with an earlier forecast for the same time frame.

Use these dimensions to rearrange the forecast comparison and analyze it from different perspectives:

Show Deals Select the data to show in the comparison. Values are *All Deals, Only revenue declines, Only revenue increases, Only fallout* and *Only new revenue.*

Product Group Select from product groups associated with the opportunities in the particular forecast.

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APPENDIX B

Sales Delivered Business Processes and Web Services

This appendix discusses the delivered BPEL processes and web services for the PeopleSoft CRM Sales.

Referral or Lead-Related Business Process Flow

This process is launched when customers import leads from external sources into the CRM system.

A lead or referral is generated in the system from any one of the various sources available, such as lead import or employee referral.

This diagram illustrates the referral or lead-related business process flow:

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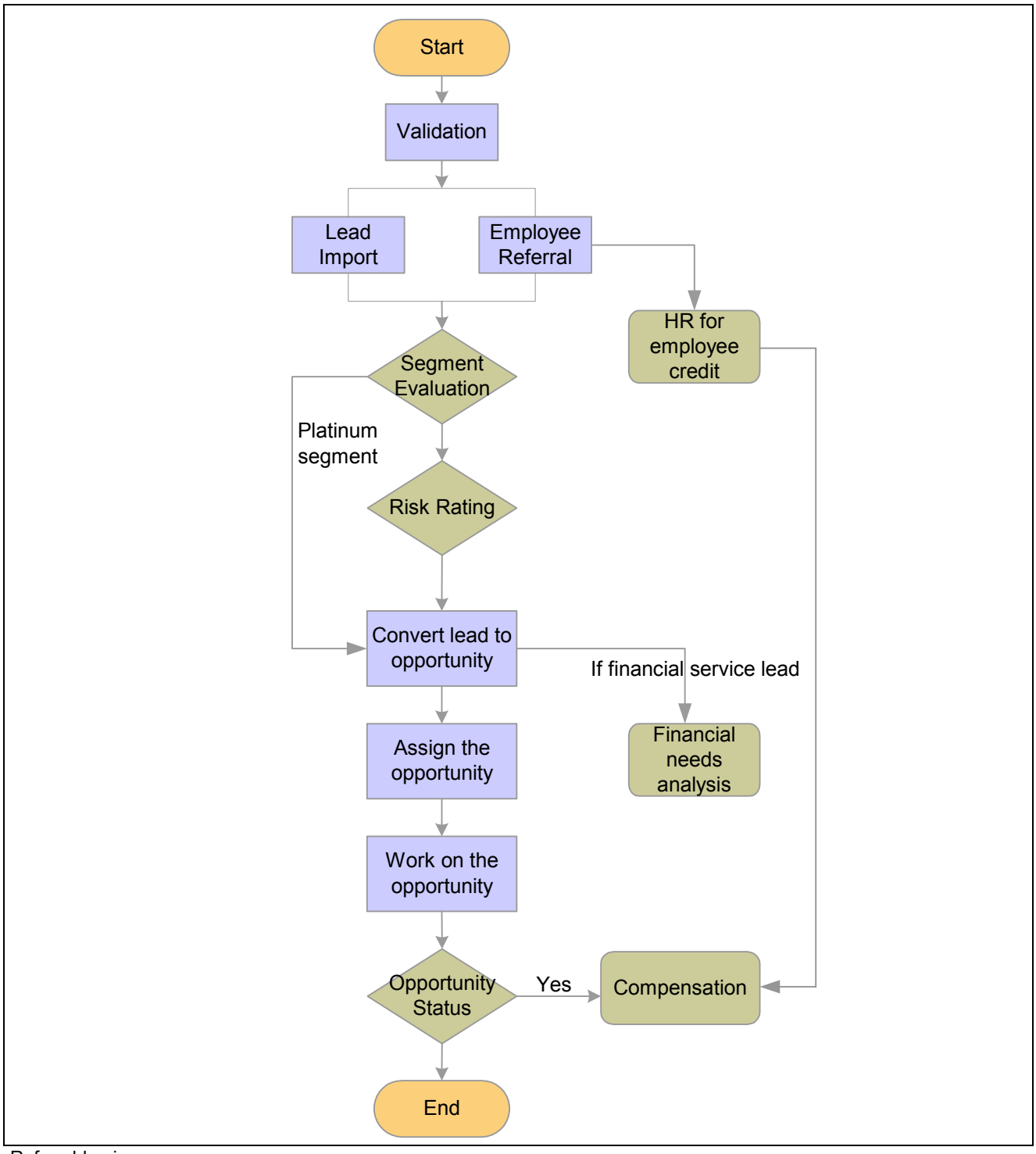

Referral business process

When the business process is initiated, it:

1. Sends the lead data to the lead service for validation.

   If the data is validated, a lead is created and the lead record is returned back to the process.

   This returned data is used to launch the main BPEL process. If the validation fails, an error is returned to the BPEL process and the process ends with an exception routine.

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2. Examines the lead source.

   If the source of the lead is an employee, the process status is set to *Employee Credit* and metric information is sent to the BPEL end user monitor for display on the history page.

   Employee information is sent to the HR web service for crediting the employee with the referral.

3. Evaluates the customer segment.

   If the customer segment is *Platinum*, then the lead is not sent to the risk rating system.

   Any other segment is sent for risk rating.

4. Sends the lead information to a risk rating system.

   Status is set to *Risk Rating*. The risk rating service sends the rating in the response and the BPEL process receives the risk rating. If the lead is considered to be risky, the process is stopped.

5. Converts the lead to an opportunity.

   Status is set to *Converting Lead*. The data is sent to the PeopleSoft Lead web service to convert the lead to an opportunity.

   The response message returns the opportunity number.

   If the process returns an error, then the process stops.

6. Assigns the opportunity.

   The process evaluates if the opportunity has a sales team member.

   If there is no sales team member , the status is set to *Waiting Assignment*. A task entry is created for the administrator to assign a sales team member to the opportunity.

   If the administrator assigns a sales team member, a confirmation that the assignment is done is returned to the process.

   If the administrator cancels the task, that information is returned to the process.

7. Performs a financial need analysis.

   A financial needs analysis is triggered if the lead is identified as a financial services lead. This task is identified with the opportunity number and is assigned to the primary sales team member of the opportunity. The analysis itself is a manual task. When the task is finished, the representative marks the task as complete. A message is sent to the BPEL process to indicate that the step is completed. This task will not delay or stop the process.

8. Creates a task for working on the opportunity.

   Status is set to *Working on Opportunity*. A task entry is created for the primary sales team member for the opportunity. The sales team member works on the opportunity and updates the status. This task will not delay or stop the process.

   Note. Warn the users to close the Opportunity first before marking the Working on Opportunity Task as *Completed*. If all the tasks associated with an opportunity are marked as completed, but the opportunity status is Open, the business process will end. The risk is, if the Opportunity is *Closed-Won* and Lead Source is *Employee*, then the employee won't get compensated

   ---

9. Gets the opportunity status.

   The process evaluates whether the opportunity is won or lost.

   If the process is won, then the lead sources is evaluated. If the lead source is an employee, the status is set to *Compensation*.

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If the opportunity is lost, the process status is set to *End*.

10. Compensates the employee.

    If the process is won, and the lead sources is an employee, then a message is sent to the compensation web service to credit the employee.

    Note. For this step, an employee compensation application must be part of your implementation.

Delivered Web Services

This section discusses the following web services:

- Lead
- Opportunity
- Search Sales User

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Working with Business Processes and Web Services," Understanding Web Services.

Lead

The Lead web service consists of these operations:

- Create Lead
- Search Leads
- Get Single Lead
- Convert Lead to Opportunity

Create Lead

Creates a lead in the CRM system. The input message contains the elements required to create the lead record. The output message contains either the Lead ID, if the operation succeeds, or validation errors, if the operation fails. Depending on the information passed, this information is created:

- Header (always created)
- Contacts
- Products
- Notes
- Partners
- Sales team

Note. To create tasks on a lead: first create the lead, then call the task web service, passing the Lead ID.

Search Leads

Returns a set of leads based on the criteria passed. The input message contains the search criteria elements; the output message contains zero or more leads and their associated attributes. If no lead is found based on the search criteria, an empty result set is returned. The passed userid determines the leads that the user is authorized to view.

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Get Single Lead

Returns a single lead based on the criteria passed.

- Header
- Contacts
- Products
- Notes
- Partners
- Sales team

Convert Lead to Opportunity

Converts a lead to an opportunity. The input message contains the Lead Identifier and an indicator for each type of lead information to copy. The output message contains the converted Opportunity Id.

Opportunity

The Opportunity web service functions similarly to the Lead web service; except that it does not contain an equivalent for the Convert Lead to Opportunity operation.

Search Sales User

The Search Sales User web service returns a set of sales users based on the criteria passed in the input message. If no sales user is found based on the supplied parameters, an empty result set is returned. Sales User's First Name or Last Name is required for this Search Operation

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APPENDIX C

PeopleSoft Enterprise Sales Reports

This appendix provides an overview of PeopleSoft Enterprise Sales reports in a summary table of all reports.

Note. For samples of these reports, see the PDF files provided on the documentation CD-ROM.

Report Description

This table lists the PeopleSoft Enterprise Sales reports, sorted alphanumerically by report ID.

Report ID and Report Name	Description	Navigation	Run Control Page
RSFC1000 Task Summary Report	Lists information about a sales representative's tasks on leads and opportunities, including task start date, end date, customer, and status.	Sales, Reports, Task Summary	RUN_RSFC1000
RSFC1001 Company	Lists information about the companies with which you do business, including the customer ID, name, website, and phone number.	Sales, Reports, Company	RUN_RSFC1001
RSFC1002 Customer Revenue Ranking By Product Group	Lists customers by revenue generated and product group. Includes customer name, revenue, percentage, total by product group, and grand total.	Sales, Reports, Customer Rev Rank	RUN_RSFC1002
RSFC1003 Forecast By Product Group	Lists forecast information by product group.	Sales, Reports, Forecast by Product Group	RUN_RSFC1003
RSFC1004 Forecast By Sales Users	Lists information about the activities of sales users.	Sales, Reports, Forecast by Sales Rep	RUN_RSFC1004
RSFC1005 Opportunity	Lists information about opportunities.	Sales, Reports, Opportunity	RUN_RSFC1005
RSFC1007 Product Group Review Revenue Analysis	Lists information about revenue, sorted by product group, including forecast name and type, sales model and stage, and total by product group.	Sales, Reports, Product Group Revenue	RUN_RSFC1007

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Report ID and Report Name	Description	Navigation	Run Control Page
RSFC1009 Revenue Fallout Analysis	Lists information about revenue fallout, including customer name, opportunity, close date, revenue, fallout reason, and totals by sales stage, territory, and business unit.	Sales, Reports, Revenue Fallout Analysis	RUN_RSFC1009
RSFC1010 Customer Revenue Ranking By Industry	Lists information about generated revenue, sorted by industry.	Sales, Reports, Rank By Industry	RUN_RSFC1010
RSFC1011 Customer Revenue Ranking By Region	Lists customer information, sorted by revenue.	Sales, Reports, Rank By Region	RUN_RSFC1011
RSFC1013 Product for Open Opportunities	Lists information about product lines and products, including associated opportunity name, quantity, unit of measure, and price.	Sales, Reports, Products Open Opportunity	RUN_RSFC1013

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Glossary of PeopleSoft Enterprise Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Enterprise Human Resources, PeopleSoft Enterprise Benefits

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Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account A feature in PeopleSoft Enterprise General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

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	for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met.

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	For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business process	A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also *detailed business process.*
business task	The name of the specific function depicted in one of the business processes.
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth.

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ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

collection To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

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compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

cost-plus contract line A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.

cost profile A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

cost row A cost transaction and amount for a set of ChartFields.

course In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and

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credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

course share set In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

data acquisition In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data cube In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.

data elements Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

directory information tree In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

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division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

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exclusive pricing In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

generic process type In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit.*

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

group In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to

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	run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects.
incentive rule	In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also *update access*.
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

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joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft Enterprise data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a

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	common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
load	In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also *3C engine.*
match group	In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single

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	transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also *compensation object.*
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.
PeopleCode event	See *event.*
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates

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	a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also *division* and *cohort.*
portal registry	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

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primacy number In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

primary name type In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

process definition Process definitions define each run request.

process instance A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

process job You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.

product line The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

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progress log In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

recname The name of a record that is used to determine the associated field to match a value or set of values.

recognition In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.

reference object In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

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reference transaction In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data Data that is extracted from a separate database and migrated into the local database.

REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

role Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

run control A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

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seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

serial genealogy In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

single signon With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

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source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

source transaction In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

speed key See *communication key.*

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

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system function In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

template A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

third party A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

TimeSpan A relative period, such as year-to-date or current period, that can be used in various PeopleSoft Enterprise General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Enterprise Projects.

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trace usage In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.

Translate table A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access.*

user interaction object In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

VAT exception Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

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VAT exoneration Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worker A person who is part of the workforce; an employee or a contingent worker.

workset A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.

worksheet A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

worklist The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML link The XML Linking language enables you to insert elements into XML documents to create a links between resources.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

XPI Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

yield by operation In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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