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PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook

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PeopleSoft Enterprise CRM 9 Industry Application Fundamentals 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.

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.

Important! Before you upgrade, you must check Oracle's PeopleSoft Customer Connection for updates to the upgrade instructions. Oracle continually posts updates as the upgrade process is refined.

See Also

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

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, http://www.oracle.com/technology/documentation/psftent.html.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

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

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 (|).

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.

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.

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.

PeopleSoft Enterprise CRM Industry Application Fundamentals Preface

This preface discusses:

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

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

PeopleSoft Enterprise CRM Application Fundamentals

The *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line.

The *PeopleSoft 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 PeopleSoft CRM workflow, the Active Analytics Framework (AAF), business projects, and scripts.
- Interactions and 360-Degree Views.

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

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

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

  This part discusses setting up agreements and warranties.
- SmartViews.

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

See Also

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

PeopleSoft Enterprise CRM 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.

There are four parts to the PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook:

- Correspondence management.

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

  This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (AAF), business projects, and scripts.
- Configuration tools.

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

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

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook

PeopleSoft Enterprise CRM Services Foundation

The *PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook* discusses configuration options that are common to PeopleSoft Enterprise Integrated FieldService, PeopleSoft Enterprise Order Capture, and the PeopleSoft call center applications (PeopleSoft Enterprise Support, PeopleSoft Enterprise HelpDesk, and PeopleSoft Enterprise HelpDesk for Human Resources).

There are three parts to the *PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook:*

- Solution management.

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

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

- Environmental Systems Research Institute (ESRI) integration.

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

See Also

PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook, “Oracle’s PeopleSoft CRM Services Foundation 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.

  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, “PeopleSoft Enterprise Customer Relationship Management Business Object Management Preface”

PeopleSoft Enterprise Product and Item Management

The *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook* discusses how to set up products in PeopleSoft CRM, including installed products, product packages, and products that are service offerings such as service agreements and warranties.

See Also

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook, “PeopleSoft Enterprise CRM Product and Item Management Preface”

PeopleTools PeopleBooks

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

CHAPTER 1

Getting Started with PeopleSoft Enterprise CRM 9 Industry Applications

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

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

PeopleSoft Enterprise CRM Industry Application Fundamentals Overview

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

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

Note. This book documents the mechanics of setting up and using industry - specific PeopleSoft CRM functionality. The use of that functionality within a business process, such as order capture or support, is discussed in the application PeopleBook.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook

PeopleSoft Enterprise CRM Applications Implementation

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

- A list of components that you must set up.

  This list is the order in which you must setup the components and enter data into them.
- Links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface of the *PeopleSoft Enterprise CRM Business Object Management PeopleBook,* with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook

PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Component Interfaces

PeopleSoft Enterprise Setup Manager for Customer Relationship Management

CHAPTER 2

Understanding PeopleSoft CRM Industry-Specific Applications

This chapter discusses:

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

PeopleSoft CRM Industry-Specific Application Design

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

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

PeopleSoft CRM Industry-Specific Documentation Structure

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

Core Documentation

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

Industry-Specific Documentation

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

- Business objects
- Sites and service locations
- Churn

- Fraud
- Business projects
- Products and services
- Case management
- Self-service

Documentation Roadmap

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

What to Read When

You can approach the documentation in the following way:

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

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

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

CHAPTER 3

Understanding Industry Solutions

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

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

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

PeopleSoft Enterprise CRM Industry Solutions

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

- Extended and enhanced data models.

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

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

- Prebuilt business processes.

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

  - Service activation.
  - Order prequalification.
  - Complex and simple service configuration.
  - Claims and policy administration.
  - First notice of loss submissions.

  - Phone number assignments.
- Prebuilt integration and integration points.

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

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

PeopleSoft Enterprise CRM Communication Solution

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

Business Processes for Communications

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

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

Order Management for Communications

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

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

Business Process	Reference
Order Capture	See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “PeopleSoft Order Capture”.
Order Capture Self-Service	See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “PeopleSoft Order Capture Self Service”.

Business Process	Reference
Bill Presentment and Account Management	See *PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook*, “Setting Up Billing Integration for the Communication and Energy Industries”.
Service Management	See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Working with PeopleSoft Service Management”.
Phone Number Administration	See *PeopleSoft Enterprise Number Management 9 PeopleBook*, “Getting Started with PeopleSoft Enterprise Phone Number Administration”.

Contact Center for Communications

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

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

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

Business Process	Reference
Support	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Business Processes”.
Support Self-Service	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Self-Service Application”.
Bill Presentment and Account Management	See *PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook*, “Setting Up Billing Integration for the Communication and Energy Industries”.

Partner Management for Communications

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

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

Business Process	Reference
Sales	See *PeopleSoft Enterprise Sales 9 PeopleBook*, “Oracle’s PeopleSoft Enterprise CRM Sales Preface”.
Order Capture	See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “PeopleSoft Order Capture”.
Services Management	See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Working with PeopleSoft Service Management”.
Phone Number Administration	See *PeopleSoft Enterprise Number Management 9 PeopleBook*, “Administering Phone Numbers”.
Partner Platform	See *PeopleSoft Enterprise CRM 9 Partner Relationship Management PeopleBook*, “Understanding PeopleSoft Partner Relationship Management”.
Partner Sales	See *PeopleSoft Enterprise CRM 9 Partner Relationship Management PeopleBook*, “Executing Partner Relationship Management Transactions”.

PeopleSoft Enterprise CRM Financial Services Solution

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

Business Processes for Financial Services

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

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

Multichannel Sales for Banking

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

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

Business Process	Reference
Sales	See *PeopleSoft Enterprise Sales 9 PeopleBook*, "Oracle's PeopleSoft Enterprise CRM Sales Preface".
Strategic Account Planning	See *PeopleSoft Enterprise Strategic Account Planning 9 PeopleBook*, "Oracle's PeopleSoft Enterprise CRM Strategic Account Planning Preface".
Order Capture	See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, "PeopleSoft Order Capture".
Order Capture Self-Service	See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, "PeopleSoft Order Capture Self Service".
Configurator	See *PeopleSoft Enterprise Advanced Configurator 9 PeopleBook*, "Getting Started with PeopleSoft Enterprise Advanced Configurator".

Contact Center for Banking

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

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

Business Process	Reference
Support	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Business Processes".
Support Self-Service	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Self-Service Application".
Banking Transactions	See *PeopleSoft Enterprise Banking Transactions 9 PeopleBook*, "Getting Started with PeopleSoft Enterprise Banking Transactions".

Wealth Management

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

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

Business Process	Reference
Client Management	See *PeopleSoft Enterprise Client Management 9 PeopleBook*, “Getting Started with PeopleSoft Enterprise Client Management”.
Strategic Account Planning	See *PeopleSoft Enterprise Strategic Account Planning 9 PeopleBook*, “Oracle’s PeopleSoft Enterprise CRM Strategic Account Planning Preface”.
Sales	See *PeopleSoft Enterprise Sales 9 PeopleBook*, “Oracle’s PeopleSoft Enterprise CRM Sales Preface”.
Portfolio Management	See *PeopleSoft Enterprise Client Management 9 PeopleBook*, “PeopleSoft Enterprise Client Management Preface”.

Agent Sales for Insurance

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

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

Business Process	Reference
Policy Management	See *PeopleSoft Enterprise Policy and Claims Presentment 9 PeopleBook*, “Working with Policies”.
Sales	See *PeopleSoft Enterprise Sales 9 PeopleBook*, “Oracle’s PeopleSoft Enterprise CRM Sales Preface”.
Order Capture	See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “PeopleSoft Order Capture”.
Configurator	See *PeopleSoft Enterprise Advanced Configurator 9 PeopleBook*, “Getting Started with PeopleSoft Enterprise Advanced Configurator”.
Partner Platform	See *PeopleSoft Enterprise CRM 9 Partner Relationship Management PeopleBook*, “Executing Partner Relationship Management Transactions”.
Partner Sales	See *PeopleSoft Enterprise CRM 9 Partner Relationship Management PeopleBook*, “Executing Partner Relationship Management Transactions”.
Partner Commerce	See *PeopleSoft Enterprise CRM 9 Partner Relationship Management PeopleBook*, “Executing Partner Relationship Management Transactions”.

Contact Center for Insurance

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

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

Business Process	Reference
Policy and Claims Presentment	See *PeopleSoft Enterprise Policy and Claims Presentment 9 PeopleBook*, "Getting Started with PeopleSoft Enterprise Policy and Claims Presentment".
Support	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Business Processes".
Support Self-Service	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Self-Service Application".
Bill Presentment and Account Management	See *PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook*, "Getting Started with PeopleSoft Enterprise Bill Presentment and Account Management".
Partner Platform	See *PeopleSoft Enterprise CRM 9 Partner Relationship Management PeopleBook*, "Understanding PeopleSoft Partner Relationship Management".
Partner Service	See *PeopleSoft Enterprise CRM 9 Partner Relationship Management PeopleBook*, "Executing Partner Relationship Management Transactions".

PeopleSoft Enterprise CRM Government Solution

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

Business Processes for Government

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

- Revenue Management for Government

- Constituent Services for Government
- Constituent Outreach for Government

Revenue Management for Government

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

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

Business Process	Reference
Marketing	See *PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook*, “Getting Started with PeopleSoft Marketing”.
Support	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Business Processes”.
Support Self-Service	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Self-Service Application”.
Order Capture	See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Getting Started with PeopleSoft Enterprise CRM Order Capture Applications”.

Constituent Services for Government

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

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

Business Process	Reference
Support	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Business Processes”.
Support Self-Service	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Self-Service Application”.

Business Process	Reference
FieldService	See *PeopleSoft Enterprise Integrated FieldService 9 PeopleBook*, “Getting Started with PeopleSoft Integrated FieldService”.
Mobile FieldService	See *PeopleSoft Enterprise CRM 9 Mobile Applications PeopleBook*, “Using PeopleSoft Enterprise Mobile FieldService”.

Constituent Outreach for Government

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

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

Business Process	Reference
Marketing	See *PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook*, “PeopleSoft Marketing Applications Preface”.
Online Marketing	See *PeopleSoft Enterprise Online Marketing 9 PeopleBook*, “PeopleSoft Online Marketing User Guide”.
Telemarketing	See *PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook*, “Using PeopleSoft Telemarketing”.

PeopleSoft Enterprise CRM Energy Solution

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

Business Processes for Energy

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

Contact Center for Energy

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

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

Business Process	**Reference**
Order Capture	See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “PeopleSoft Order Capture”.
Support	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Business Processes”.
Bill Presentment and Account Management	See *PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook*, “Getting Started with PeopleSoft Enterprise Bill Presentment and Account Management”.

PeopleSoft Enterprise CRM High Technology Solution

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

Business Processes for High Technology

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

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

Multichannel Sales for High Technology

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

Business Process	**Reference**
Marketing	See *PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook*, “Getting Started with PeopleSoft Marketing”.

Business Process	Reference
Online Marketing	See *PeopleSoft Enterprise Online Marketing 9 PeopleBook*, “Getting Started with PeopleSoft Online Marketing”.
Sales	See *PeopleSoft Enterprise Sales 9 PeopleBook*, “Getting Started with PeopleSoft Enterprise Sales”.
Order Capture	See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Getting Started with PeopleSoft Enterprise CRM Order Capture Applications”.
Order Capture Self-Service	See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “PeopleSoft Order Capture Self Service”.

Contact Center for High Technology

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

Business Process	Reference
Support	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Getting Started with PeopleSoft Enterprise CRM Call Center Applications”.
Support Self-Service	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Self-Service Application”.
FieldService	See *PeopleSoft Enterprise Integrated FieldService 9 PeopleBook*, “Getting Started with PeopleSoft Integrated FieldService”.
Quality	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Setting Up PeopleSoft Quality Management”.

CHAPTER 4

Setting Up Industry-Specific Functionality

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

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

Understanding Industry-Specific Setup

Industry-specific setup consists of three setup steps:

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

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

Requirements Applicable to All Industries

This section discusses:

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

Roles and User IDs

PeopleSoft provides several roles with predefined user profiles and permission lists in the demonstration database. You can use these sample security configurations as they are delivered, or you can modify them to meet your specific security requirements. The roles and permissions are part of the system data, and the users are part of the sample data delivered in the demonstration database.

Communications is delivered with four roles:

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

Energy is delivered with three roles:

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

Financial services is delivered with three roles:

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

Insurance is delivered with three roles:

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

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up Security and User Preferences,” Predefined Security Roles and Sample Users.

Markets

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

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

Industry-Specific Page Setup

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

Industry-Specific Translate Values

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

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Configuring Field Values," Modifying Industry-Specific Translate Values.

Attributes

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

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Configuring Attributes," Understanding Attributes.

Display Templates

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

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

Requirements for Financial Services

This section discusses setIDs and autonumbering.

Set IDs and Autonumbering

Autonumbering is generally controlled by setID. Certain objects that are not keyed by business unit or setID are hard-coded to use rules that are set up under the SHARE or NONE setIDs.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up General Options,” Automatic Numbering.

Requirements for Insurance

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

See Chapter 18, “Working with Self Service Transactions for Insurance,” Reporting an FNOL, page 186.

Requirements for Communications

This section discusses:

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

Call Center Business Unit Setup for Communications

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

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

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

See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Defining Call Center Business Units and Display Template Options”.

Order Capture for Communications

When you prepare Order Capture for communications, consider:

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

  This automatically links each new customer with a price list.
- Order Capture supports business event logic, in the form of application class sets. These events are used out-of-the-box in the communications industry.

Label Change

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

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Configuring Field Values,” Understanding the Label Change Utility.

Service Management

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

See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Working with PeopleSoft Service Management”.

Requirements for Energy

This section discusses installed services used for energy related industries.

Installed Services

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

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

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

Order Capture provides the functionality to automatically update an installed service record when the order capture process takes place, which is achieved by the three business project templates delivered in energy for Order Capture: *ENRGY_START_SVC*, *ENRGY_STOP_SVC*, and *ENRGY_TRSFR_SVC*.

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

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

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

See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Working with PeopleSoft Service Management”.

See *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, “Tracking Installed Products and Assets”.

Setting Up Common Industry Functionality

This section discusses how to:

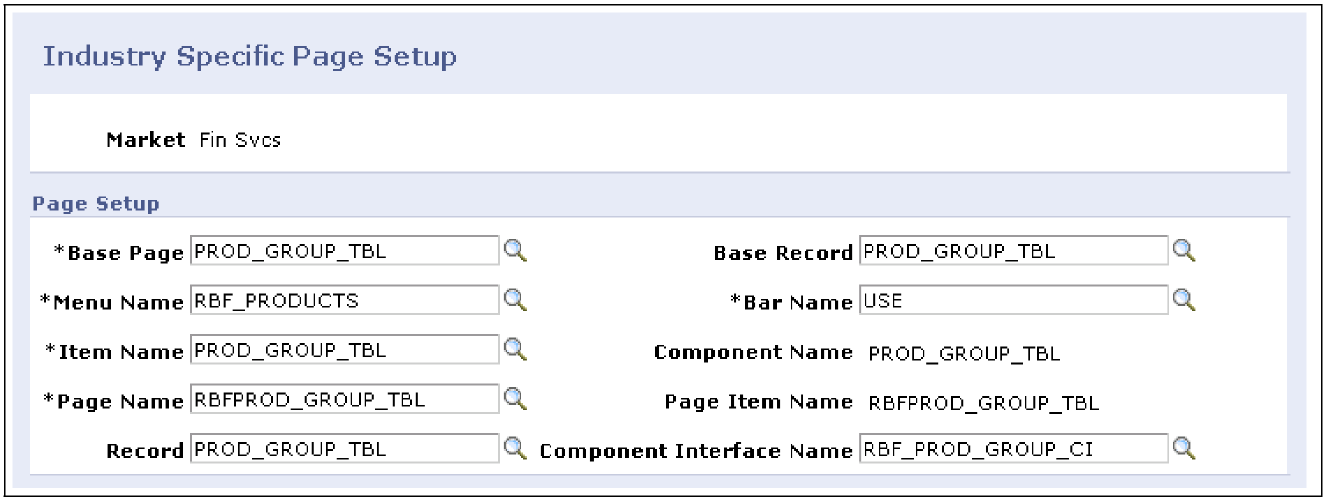
- Set up industry-specific pages.
- Set up industry-specific translate values.

Pages Used to Set Up Common Industry Functionality

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

Setting Up Industry-Specific Pages

Access the Industry-Specific Page Setup page.



Industry Specific Page Setup

Market Fin Svcs

Page Setup

*Base Page PROD_GROUP_TBL

Base Record PROD_GROUP_TBL

*Menu Name RBF_PRODUCTS

*Bar Name USE

*Item Name PROD_GROUP_TBL

Component Name PROD_GROUP_TBL

*Page Name RBFPROD_GROUP_TBL

Page Item Name RBFPROD_GROUP_TBL

Record PROD_GROUP_TBL

Component Interface Name RBF_PROD_GROUP_CI

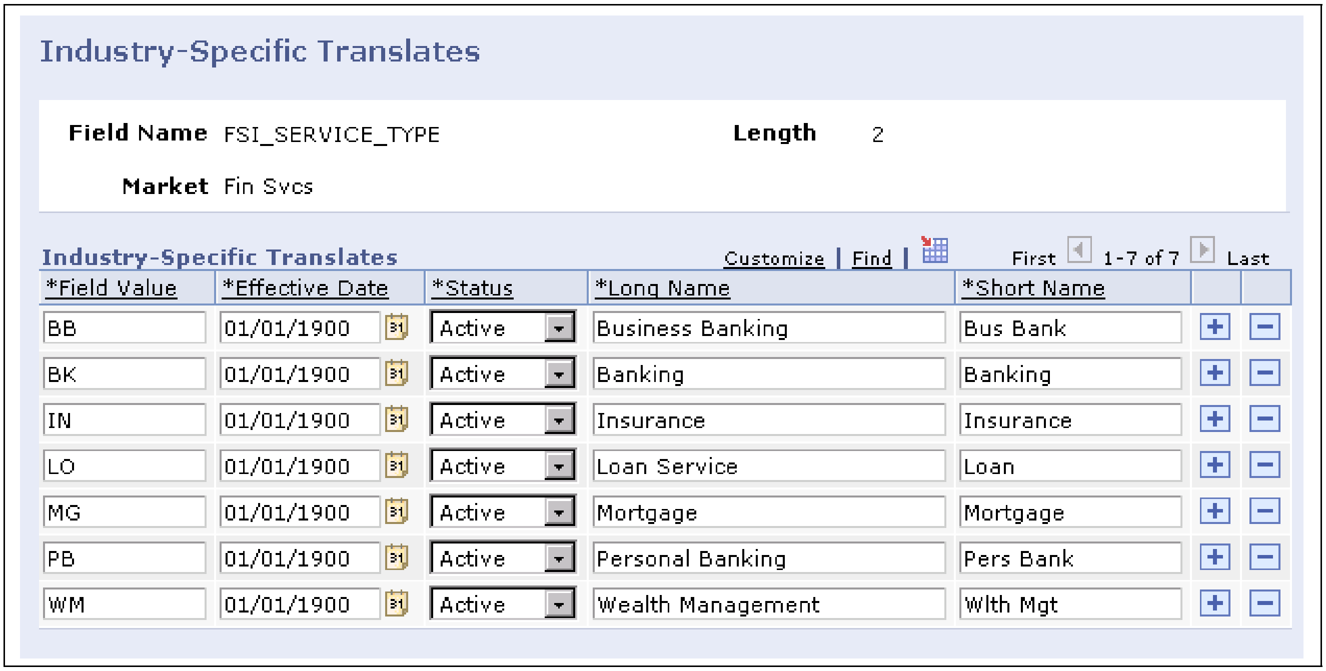
Industry-Specific Page Setup page

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

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

Setting Up Industry-Specific Translate Values

Access the Industry-Specific Translates page.



Industry-Specific Translates

Field Name FSI_SERVICE_TYPE **Length** 2

Market Fin Svcs

Industry-Specific Translates

*Field Value	*Effective Date	*Status	*Long Name	*Short Name
BB	01/01/1900	Active	Business Banking	Bus Bank
BK	01/01/1900	Active	Banking	Banking
IN	01/01/1900	Active	Insurance	Insurance
LO	01/01/1900	Active	Loan Service	Loan
MG	01/01/1900	Active	Mortgage	Mortgage
PB	01/01/1900	Active	Personal Banking	Pers Bank
WM	01/01/1900	Active	Wealth Management	Wlth Mgt

Industry-Specific Translates page

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

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Business Units and TableSet Controls”.

Setting Up Insurance Industry Translate Values

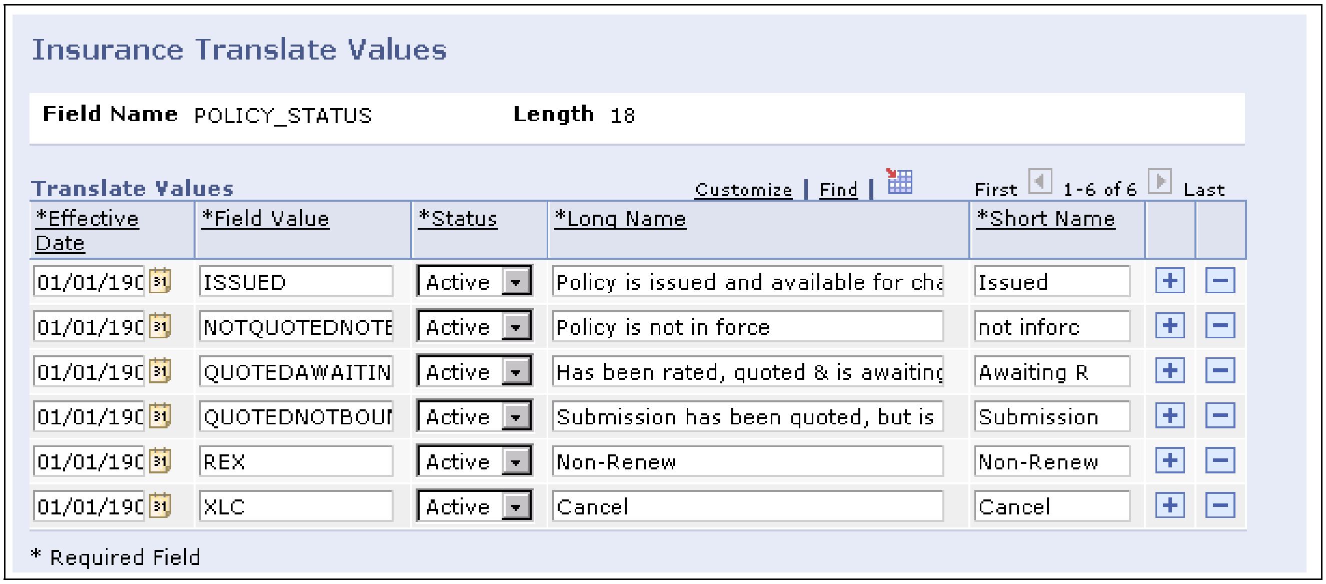
This section discusses how to set up insurance industry translate values.

Page Used to Set Up Insurance Industry Translate Values

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

Setting Up Insurance Industry Translate Values

Access the Insurance Translate Values page.



Insurance Translate Values

Field Name POLICY_STATUS **Length** 18

Translate Values

*Effective Date	*Field Value	*Status	*Long Name	*Short Name
01/01/190	ISSUED	Active	Policy is issued and available for cha	Issued
01/01/190	NOTQUOTEDNOTE	Active	Policy is not in force	not inforc
01/01/190	QUOTEDAWAITIN	Active	Has been rated, quoted & is awaiting	Awaiting R
01/01/190	QUOTEDNOTBOUI	Active	Submission has been quoted, but is	Submission
01/01/190	REX	Active	Non-Renew	Non-Renew
01/01/190	XLC	Active	Cancel	Cancel

* Required Field

Insurance Translate Values page

Effective Date	Enter the date on which you want this value to take effect. The default is today's date. If you want the effective date to predate all rows on your database, enter 01011900 (January 1, 1900).
Field Value	Enter the translate value for the field. The number of characters entered in this field cannot exceed the number specified in the Length field.
Status	Select *Active*. When a value for a field becomes obsolete, select *Inactive* rather than deleting it. Deactivating a value enables fields in the database that still contain the value to use the correct long and short names. If you delete an obsolete code from the Translate table and you still have records in the database that contain that value, you must change all of those values to active values.
Long Name	Enter up to 30 characters. Field values are sorted by their long names at run time and appear in the system in ascending order. For example, if the long names entered for the three field values are *Activated*, *Suspended*, and *Disconnected*, they appear in the corresponding drop-down list box in this order: *Activated*, *Disconnected*, and *Suspended*.
Short Name	Enter up to 10 characters.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Working with Business Units and TableSet Controls,” Defining Business Units and TableSet Controls

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Setting Up Online Application Forms for FNOL

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

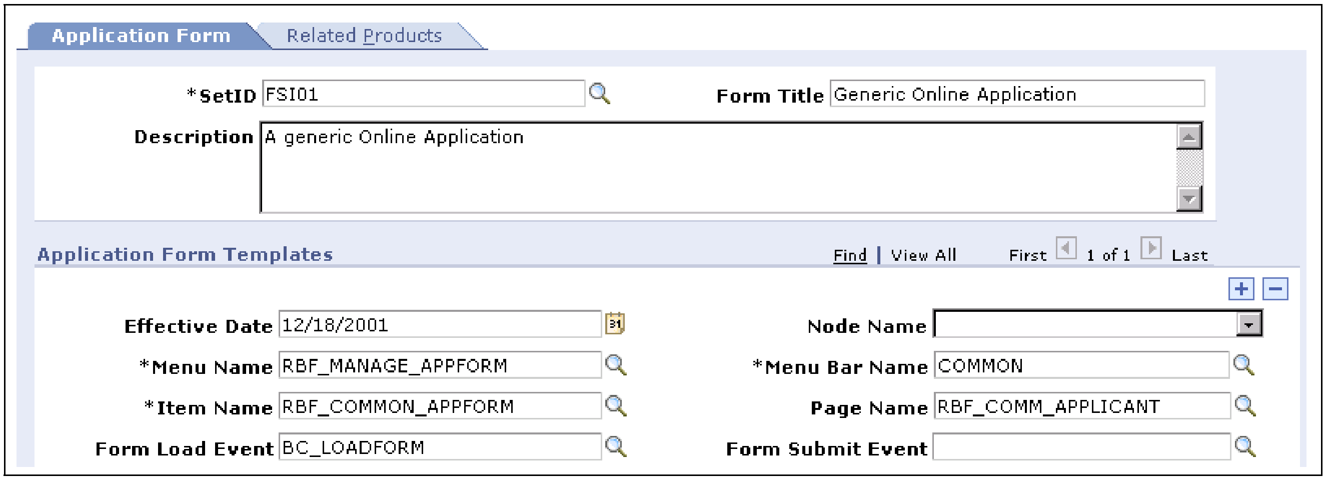
This section discusses how to set up online application forms.

Pages Used to Set Up Online Application Forms

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

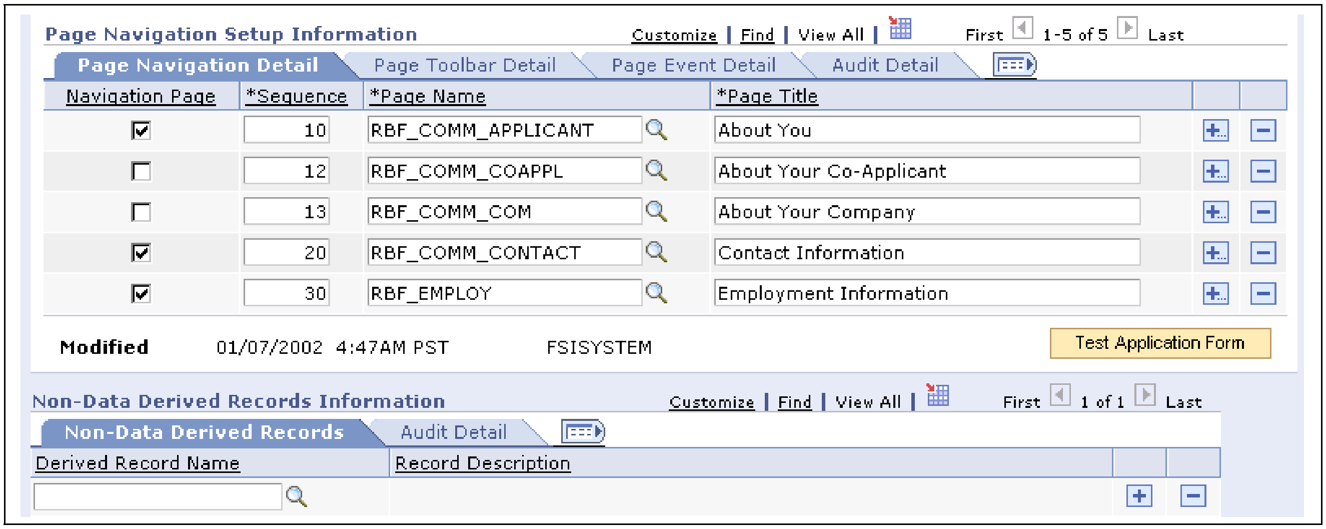
Setting Up Online Application Forms

Access the Application Form page.


Application Form
Related Products
Application Form Templates
Find | View All First 1 of 1 Last

*SetID	FSI01	Form Title	Generic Online Application
Description	A generic Online Application		
Effective Date	12/18/2001	Node Name	
*Menu Name	RBF_MANAGE_APPFORM	*Menu Bar Name	COMMON
*Item Name	RBF_COMMON_APPFORM	Page Name	RBF_COMM_APPLICANT
Form Load Event	BC_LOADFORM	Form Submit Event	

Application Form page (1 of 2)


Page Navigation Setup Information
Customize | Find | View All | First 1-5 of 5 Last
Page Navigation Detail
Page Toolbar Detail
Page Event Detail
Audit Detail
Test Application Form
Non-Data Derived Records Information
Customize | Find | View All | First 1 of 1 Last
Non-Data Derived Records
Audit Detail

Navigation Page	*Sequence	*Page Name	*Page Title
☑	10	RBF_COMM_APPLICANT	About You
☐	12	RBF_COMM_COAPPL	About Your Co-Applicant
☐	13	RBF_COMM_COM	About Your Company
☑	20	RBF_COMM_CONTACT	Contact Information
☑	30	RBF_EMPLOY	Employment Information

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Derived Record Name	Record Description

Application Form page (2 of 2)

SetID	Select the setID that will have access to the application form.
Form Title	Enter the application title to be used when the application form is processed.
Description	Enter the application form usage and any specifications.

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

Effective Date	Displays the application form effective date.
Node Name	Select the node in which the application form is processed. This functionality is not supported for this release.
Menu Name	Specify the menu where the application form component is added.
Menu Bar Name	Specify the menu bar name where the application form component is added.
Item Name	Specify the item name where the application form component is added.
Page Name	Specify the first page to appear when the application form is processed.

Form Load Event	Specify the action set to be triggered when the application form is processed. For example, this could be a function call to pre-fill information.
Form Submit Event	Specify the action set to be triggered when the Submit button is clicked.

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

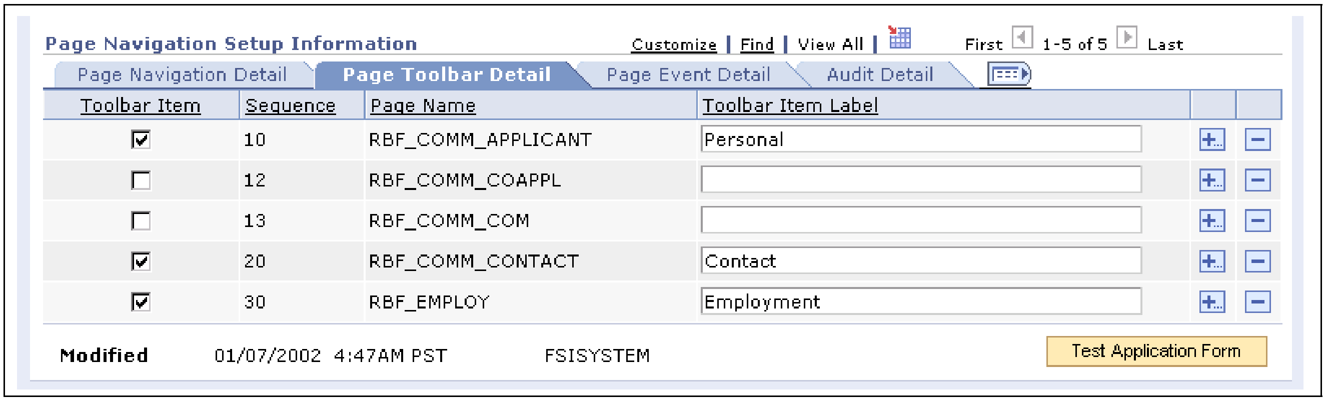
Navigation Page	Select or clear to specify if this page is navigable or not.
Sequence	Enter the order of the navigable pages.
Page Name	Specify the page to appear.
Page Title	Enter the title to appear when the page is loaded.
Test Application Form	Click to preview the form.

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

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

Page Toolbar Detail

Select the Application Form page: Page Toolbar Detail tab.



Toolbar Item	Sequence	Page Name	Toolbar Item Label
☑	10	RBF_COMM_APPLICANT	Personal
☐	12	RBF_COMM_COAPPL	
☐	13	RBF_COMM_COM	
☑	20	RBF_COMM_CONTACT	Contact
☑	30	RBF_EMPLOY	Employment

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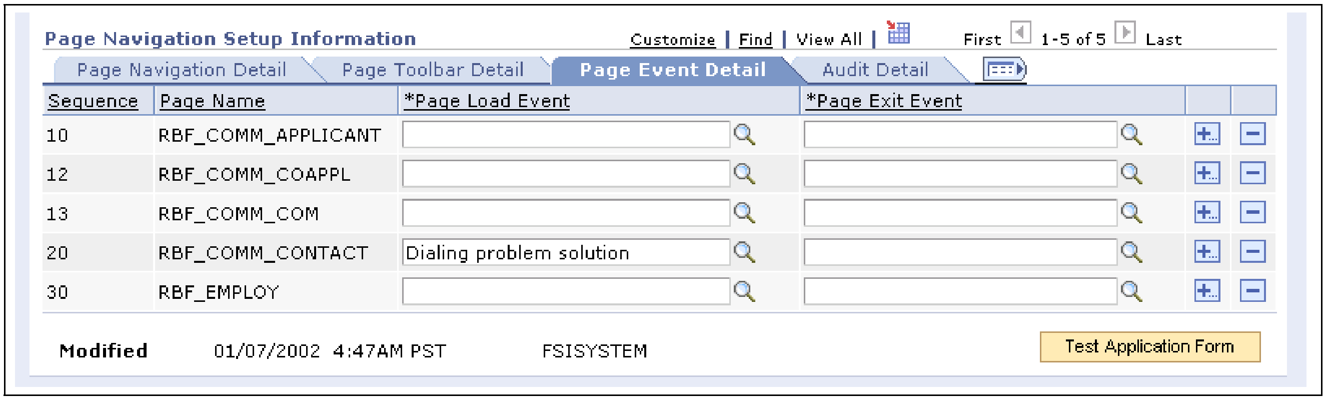
Application Form page: Page Toolbar Detail tab

Toolbar Item	Select the check box, if the page is accessible from the toolbar.
Toolbar Item Label	Enter the toolbar title that appears as the link's tooltip for the page. When the user moves the mouse on the link, the name appears. When the user clicks the link, the system loads the related page.

Page Event Detail

Select the Application Form page: Page Event Detail tab.


Customize | Find | View All |
First 1-5 of 5 Last
Page Navigation Detail
Page Toolbar Detail
Page Event Detail
Audit Detail
Test Application Form

Page Navigation Setup Information

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

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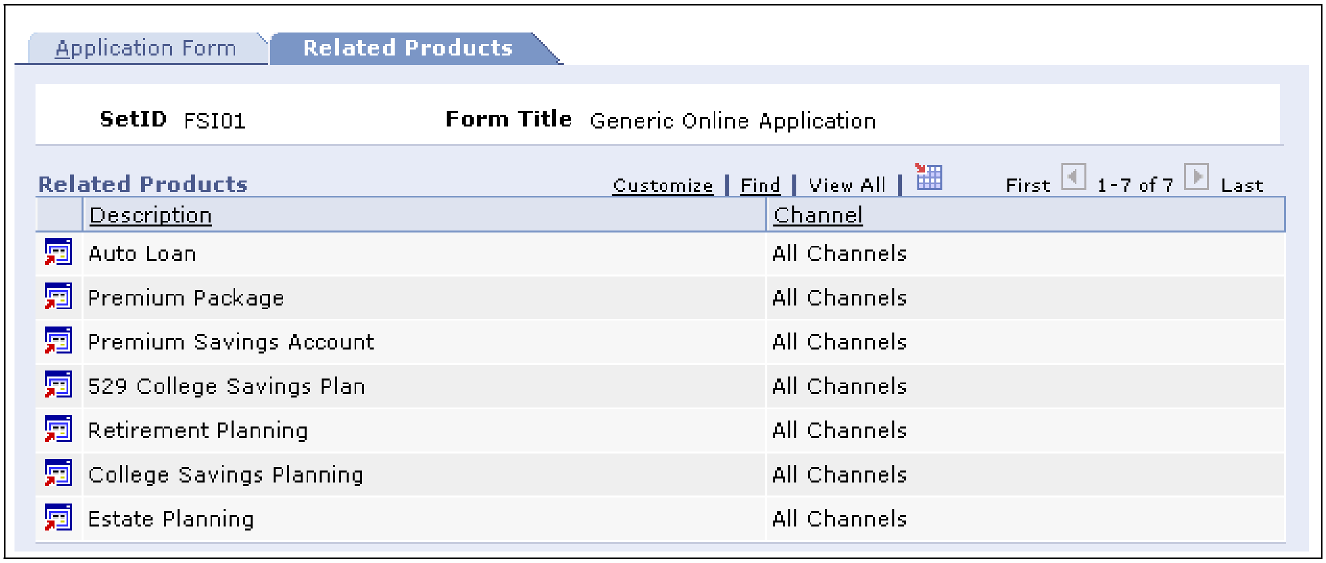
Application Form page: Page Event Detail tab

Page Load Event	Specify the action set that is triggered when the page is loaded and before the page appears. For example, you might transfer data from one page to another.
Page Exit Event	Specify the action set that is triggered before the page is unloaded. For example, you might validate data on the current page before moving to the next page.

Viewing Related Products

Access the Related Products page.


Application Form
Related Products
Customize | Find | View All |
First 1-7 of 7 Last

SetID FSI01 **Form Title** Generic Online Application

Related Products

Description	Channel
Auto Loan	All Channels
Premium Package	All Channels
Premium Savings Account	All Channels
529 College Savings Plan	All Channels
Retirement Planning	All Channels
College Savings Planning	All Channels
Estate Planning	All Channels

Related Products page

View a list of all products using the application form.

See Also

Chapter 18, “Working with Self Service Transactions for Insurance,” Reporting an FNOL, page 186

Setting Up Configuration Tables for Energy and Communications

When setting up the Configuration table for communications, consider:

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

When setting up the Configuration table for energy, RBT_CONFIG_TBL, consider the following:

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

See Also

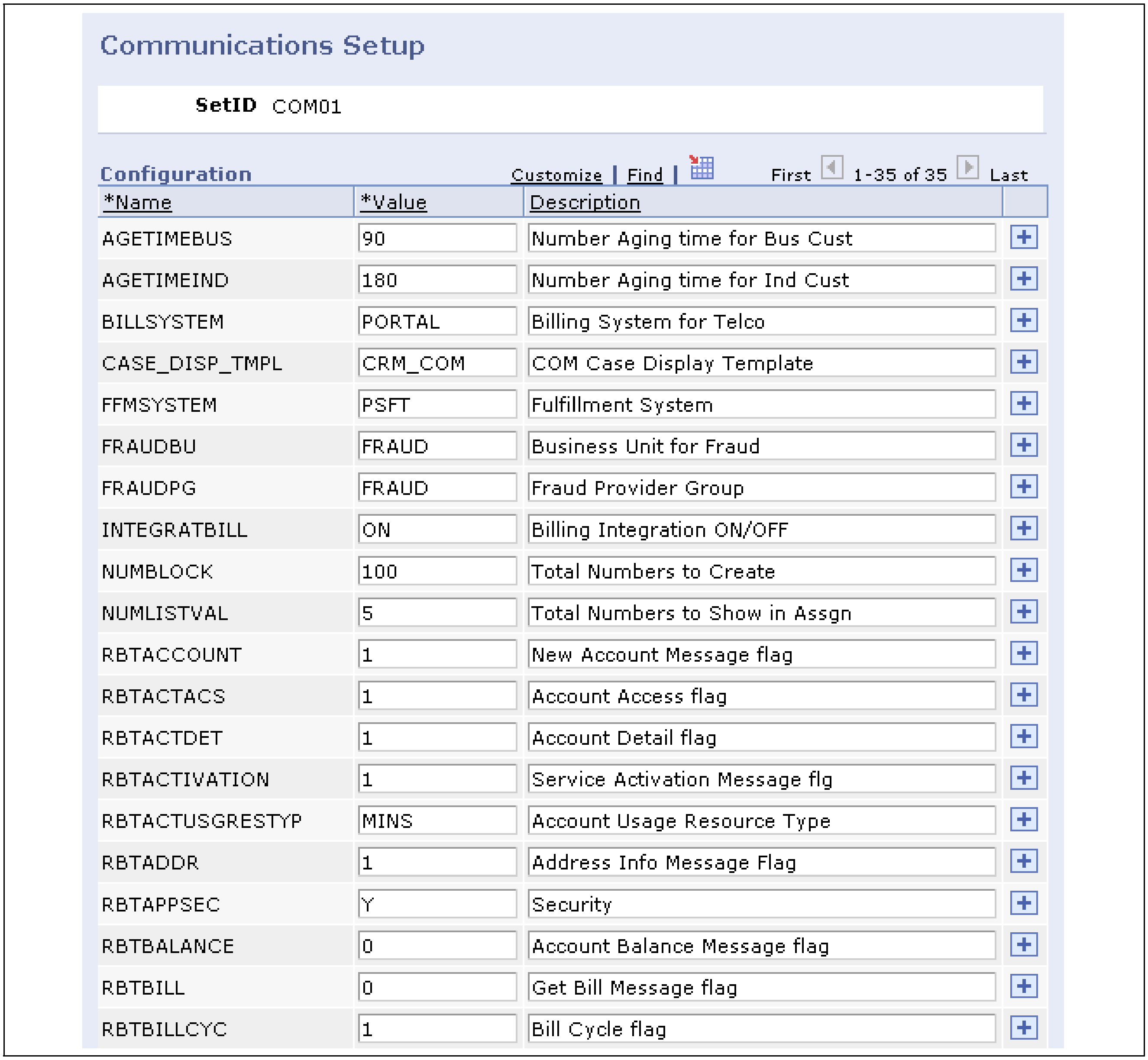
PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Understanding Configuration Tools”

Page Used to Set Up the Configuration Table for Energy or Communications

Page Name	Object Name	Navigation	Usage
Communications Setup	RBT_CONFIG_PG	Set Up CRM, Product Related, Communications, Communications Setup, Communications Setup	Set up the configuration parameters for the communications industry.
Energy Setup	RBT_CONFIG_PG	Set Up CRM, Product Related, Energy, Energy Setup, Energy Setup	Set up the configuration parameters for the energy industry.

Setting Up the Communications or Energy Configuration Table

Access the Communications (or Energy) Setup page.



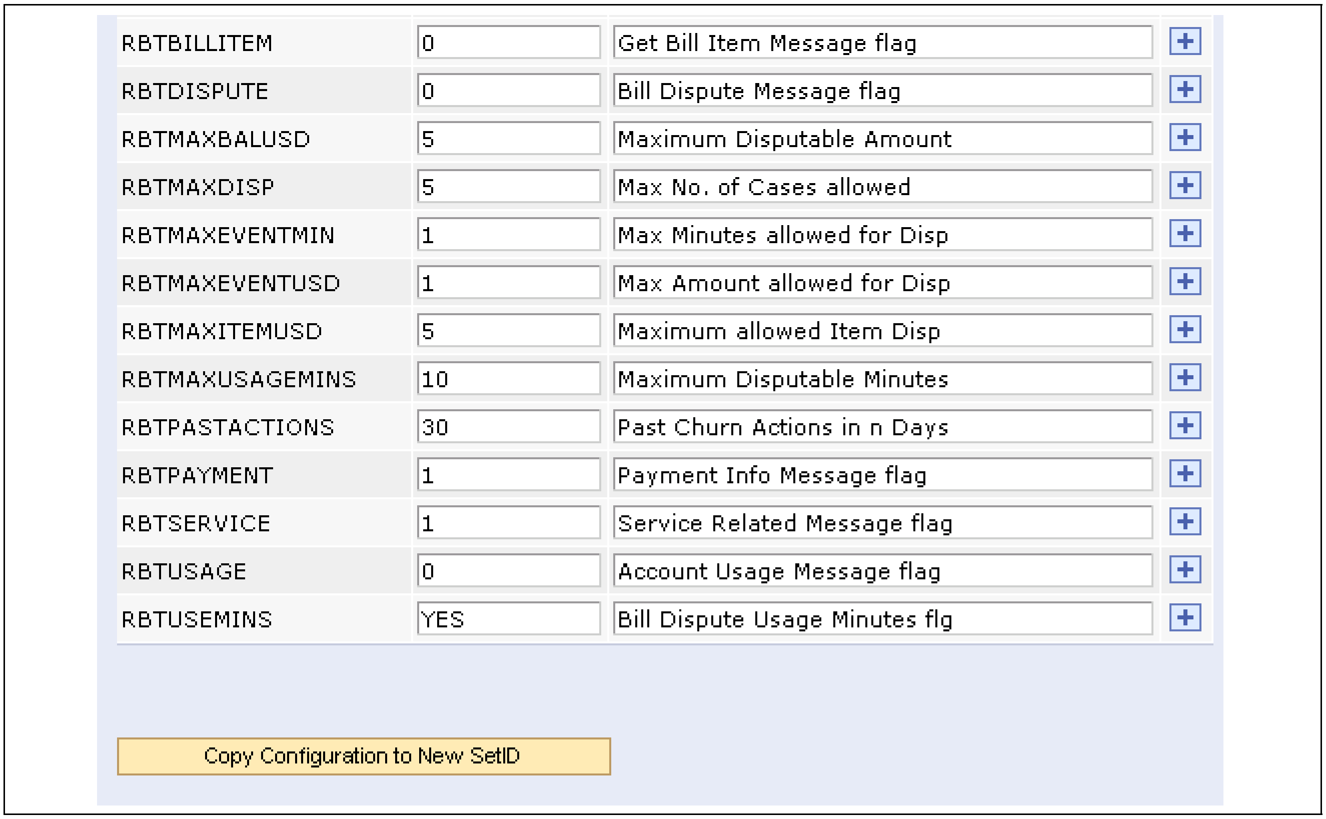
Communications Setup

SetID COM01

Configuration

*Name	*Value	Description	
AGETIMEBUS	90	Number Aging time for Bus Cust	+
AGETIMEIND	180	Number Aging time for Ind Cust	+
BILLSYSTEM	PORTAL	Billing System for Telco	+
CASE_DISP_TMPL	CRM_COM	COM Case Display Template	+
FFMSYSTEM	PSFT	Fulfillment System	+
FRAUDBU	FRAUD	Business Unit for Fraud	+
FRAUDPG	FRAUD	Fraud Provider Group	+
INTEGRATBILL	ON	Billing Integration ON/OFF	+
NUMBLOCK	100	Total Numbers to Create	+
NUMLISTVAL	5	Total Numbers to Show in Assgn	+
RBTACCOUNT	1	New Account Message flag	+
RBTACTACS	1	Account Access flag	+
RBTACTDET	1	Account Detail flag	+
RBTACTIVATION	1	Service Activation Message flg	+
RBTACTUSGRESTYP	MINS	Account Usage Resource Type	+
RBTADDR	1	Address Info Message Flag	+
RBTAPPSEC	Y	Security	+
RBTBALANCE	0	Account Balance Message flag	+
RBTBILL	0	Get Bill Message flag	+
RBTBILLCYC	1	Bill Cycle flag	+

Communications Setup page (1 of 2)



RBTBILLITEM	0	Get Bill Item Message flag
RBTDISPUTE	0	Bill Dispute Message flag
RBTMAXBALUSD	5	Maximum Disputable Amount
RBTMAXDISP	5	Max No. of Cases allowed
RBTMAXEVENTMIN	1	Max Minutes allowed for Disp
RBTMAXEVENTUSD	1	Max Amount allowed for Disp
RBTMAXITEMUSD	5	Maximum allowed Item Disp
RBTMAXUSAGEMINS	10	Maximum Disputable Minutes
RBTPASTACTIONS	30	Past Churn Actions in n Days
RBTPAYMENT	1	Payment Info Message flag
RBTSERVICE	1	Service Related Message flag
RBTUSAGE	0	Account Usage Message flag
RBTUSEMINS	YES	Bill Dispute Usage Minutes flg

Communications Setup page (2 of 2)

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

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

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Understanding Configuration Tools”

Setting Up Communications Industry-Specific Tables

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

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

Understanding Call Center Business Unit Setup for Communications

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

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

Setting Up Case Creation for Self-Service Users

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

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

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

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

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

3. Associate the person with the user profile.

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

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “Defining Call Center Business Units and Display Template Options,” Defining Call Center Business Units

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “Configuring Self-Service Applications,” Understanding PeopleSoft Call Center’s Self-Service Application Configuration

Understanding Order Capture for Communications

When you prepare Order Capture for communications, consider:

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

  This automatically links each new customer with a price list.

See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Defining Order Capture Business Units,” Defining Order Capture Business Units.

Pages Used to Set Up Communications Industry-Specific Tables

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

CHAPTER 5

Setting Up Business Objects

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

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

Understanding Business Objects

This section lists prerequisites and discusses:

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

Core Application Business Objects

PeopleSoft delivers these core application business objects:

- Company
- Person
- Consumer
- Contact
- Site

For complete details about the setup and management of core application business objects, refer to *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “Business Object Management Basics”; *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “Data Management for Organization Business Objects” and *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “Data Management for Individual Business Objects”.

Business Objects for Industry-Specific Applications

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

Company

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

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

Partnership

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

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

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

See *PeopleSoft Enterprise CRM 9 Partner Relationship Management PeopleBook*, “Understanding PeopleSoft Partner Relationship Management”.

Alternate Capacity

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

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

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

Household

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

Note. Household is designed specifically for Wealth Management functionality.

See *PeopleSoft Enterprise Client Management 9 PeopleBook*, “Working with Wealth Management,” Understanding Household Relationships.

Roles and Relationships

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

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

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

- *Relationships* further define the customer.

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

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

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Control Values for Business Objects," Defining Role Types and Role Categories

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Control Values for Business Objects," Defining Relationship Types and Relationship Categories

Prerequisites

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

Process	Details	More Information
Understanding business object management	• Business object relationship model components. • Integration with other systems. • Control values. • Relationship viewer. • Business object directory searches. • Quick Create.	See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Understanding Business Object Relationship Model Components".

Process	Details	More Information
Setting up core business objects	• Company. • Person • Consumer. • Contact. • Site. • Ad hoc business objects.	See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Understanding Business Object Relationship Model Components"; *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Control Values for Business Objects"; *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Site Business Objects" and *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Ad Hoc Business Objects".
Setting up details for business objects	• Name information. • Contact information.	See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Name and Address Information for Business Objects"; *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Control Values for Business Objects," Setting Up Contact Methods and *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Company Business Objects," Defining Company Contacts.

Setting Up Companies

This section discusses how to:

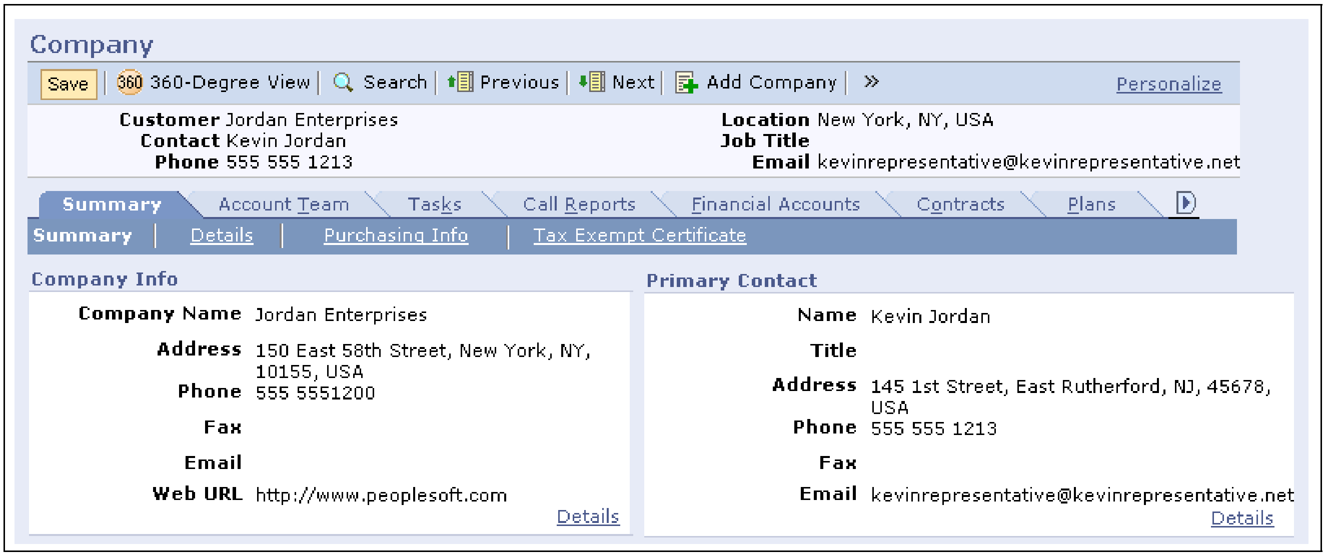
- Define company general information.
- View and maintain contracts.
- View company financial accounts.

Pages Used to Set Up Companies

Page Name	Object Name	Navigation	Usage
Company - Company	RDF_COMPANY_MAIN_2	Customers CRM, Company, Company	View and define primary information about the company.
Company - Contracts	RDFCOMPANY_ACNT	Customers CRM, Company, Contracts	View and maintain contracts associated with the company.
Company - Financial Accounts	RDFCOMPANY_ACCT	Customers CRM, Company, Financial Accounts	View financial accounts associated with the company.

Viewing Summary Company Information

Access the Company - Summary page.


Company
Save
360-Degree View
Search
Previous
Next
Add Company
Personalize
Summary
Account Team
Tasks
Call Reports
Financial Accounts
Contracts
Plans
Summary
Details
Purchasing Info
Tax Exempt Certificate
Company Info
Primary Contact
Details
Details

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

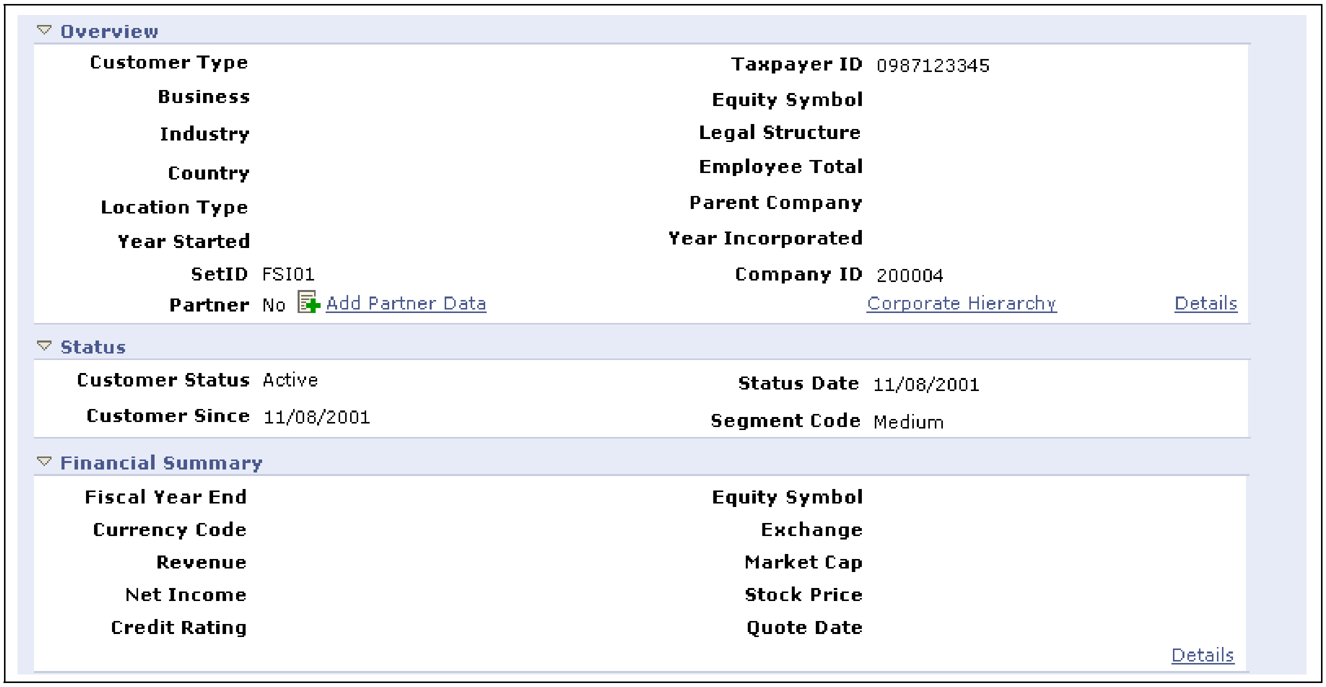
Company Info

Company Name Jordan Enterprises
Address 150 East 58th Street, New York, NY, 10155, USA
Phone 555 5551200
Fax
Email
Web URL http://www.peoplesoft.com

Primary Contact

Name Kevin Jordan
Title
Address 145 1st Street, East Rutherford, NJ, 45678, USA
Phone 555 555 1213
Fax
Email kevinrepresentative@kevinrepresentative.net

Company - Details page (1 of 2)



Customer Type		Taxpayer ID	0987123345
Business		Equity Symbol	
Industry		Legal Structure	
Country		Employee Total	
Location Type		Parent Company	
Year Started		Year Incorporated	
SetID	FSI01	Company ID	200004
Partner	No Add Partner Data	Corporate Hierarchy	Details

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

Fiscal Year End		Equity Symbol	
Currency Code		Exchange	
Revenue		Market Cap	
Net Income		Stock Price	
Credit Rating		Quote Date	

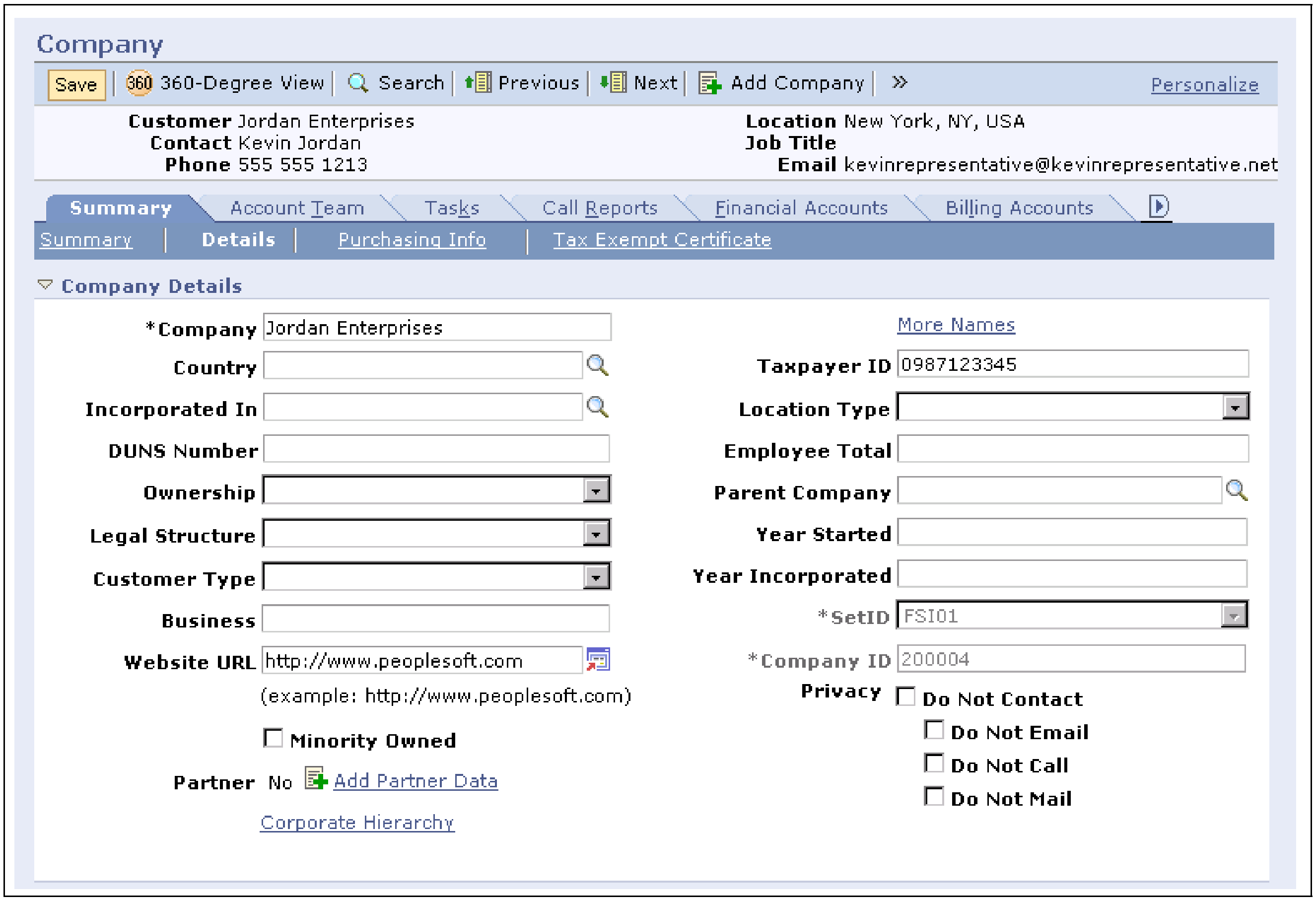
Company - Details page (2 of 2)

Explanations of these fields are provided in the *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook.*

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

Maintaining General Company Information

Access the Company - Details page.

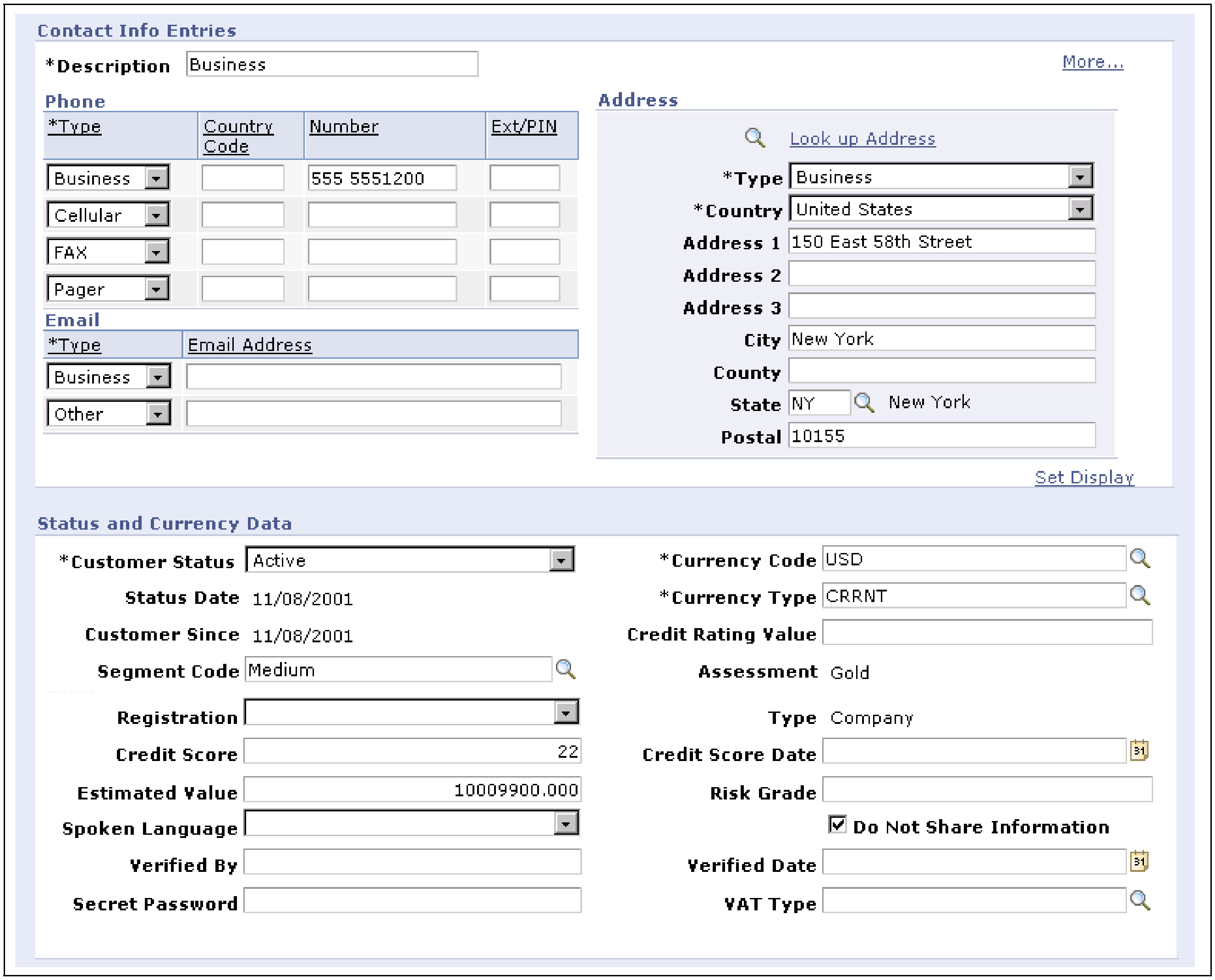

Company
Save
360-Degree View
Search
Previous
Next
Add Company
Personalize
Summary
Account Team
Tasks
Call Reports
Financial Accounts
Billing Accounts
Summary
Details
Purchasing Info
Tax Exempt Certificate
Company Details
More Names
Add Partner Data
Corporate Hierarchy

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

***Company** Jordan Enterprises
Country
Incorporated In
DUNS Number
Ownership
Legal Structure
Customer Type
Business
Website URL http://www.peoplesoft.com
(example: http://www.peoplesoft.com)
☐ **Minority Owned**
Partner No

Taxpayer ID 0987123345
Location Type
Employee Total
Parent Company
Year Started
Year Incorporated
***SetID** FSI01
***Company ID** 200004
Privacy ☐ **Do Not Contact**
☐ **Do Not Email**
☐ **Do Not Call**
☐ **Do Not Mail**

Company - Details page (1 of 3)



Contact Info Entries

*Description: Business

More...

Phone

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

Email

*Type	Email Address
Business	
Other	

Address

Look up Address

*Type: Business
*Country: United States
Address 1: 150 East 58th Street
Address 2:
Address 3:
City: New York
County:
State: NY New York
Postal: 10155

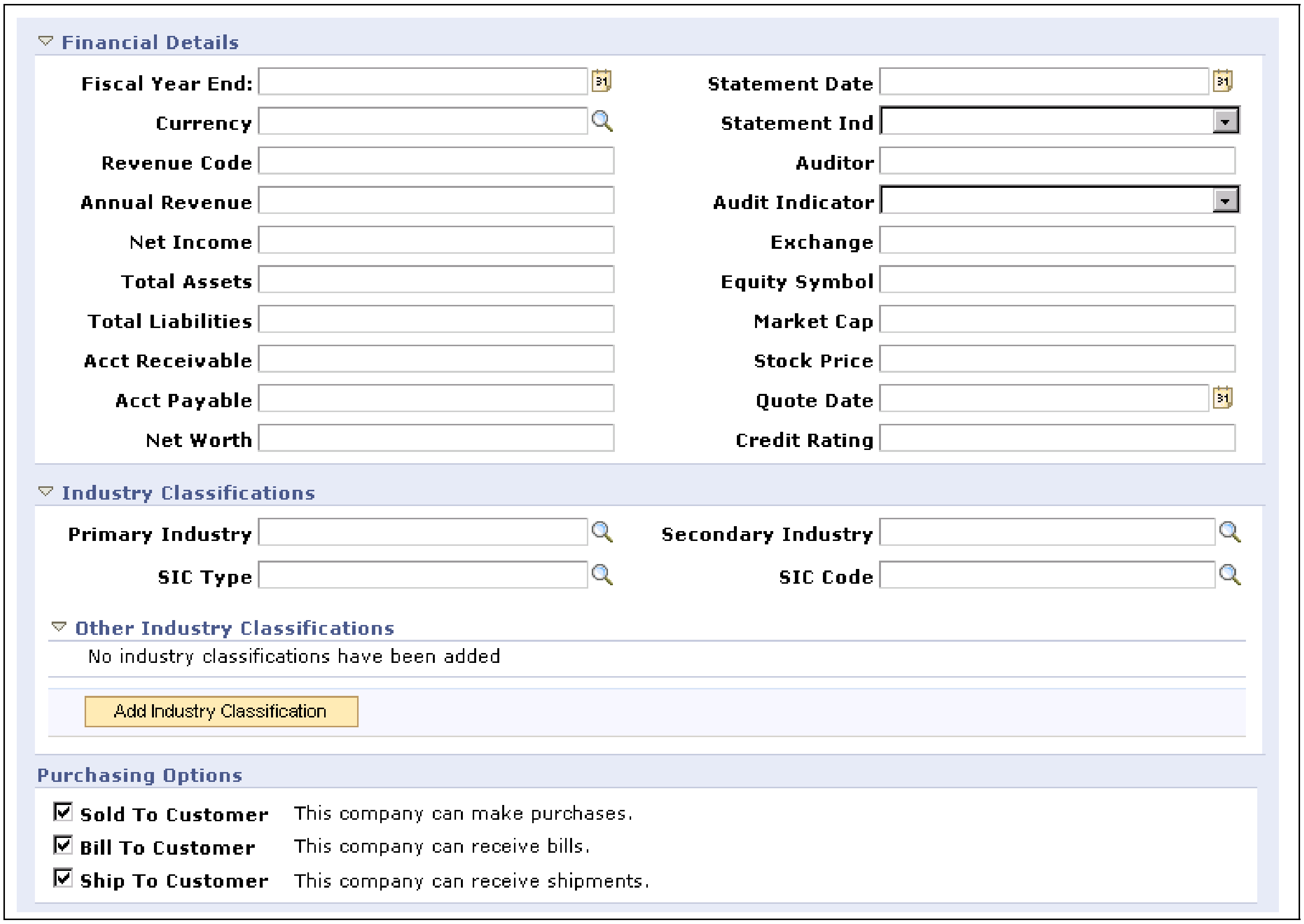
Set Display

Status and Currency Data

*Customer Status: Active
Status Date: 11/08/2001
Customer Since: 11/08/2001
Segment Code: Medium
Registration:
Credit Score: 22
Estimated Value: 10009900.000
Spoken Language:
Verified By:
Secret Password:

*Currency Code: USD
*Currency Type: CRRNT
Credit Rating Value:
Assessment: Gold
Type: Company
Credit Score Date:
Risk Grade:
☑ Do Not Share Information
Verified Date:
VAT Type:

Company - Details page (2 of 3)


Financial Details
Fiscal Year End:
Statement Date
Currency
Statement Ind
Revenue Code
Auditor
Annual Revenue
Audit Indicator
Net Income
Exchange
Total Assets
Equity Symbol
Total Liabilities
Market Cap
Acct Receivable
Stock Price
Acct Payable
Quote Date
Net Worth
Credit Rating
Industry Classifications
Primary Industry
Secondary Industry
SIC Type
SIC Code
Other Industry Classifications
Add Industry Classification
Purchasing Options

No industry classifications have been added

☑ **Sold To Customer**	This company can make purchases.
☑ **Bill To Customer**	This company can receive bills.
☑ **Ship To Customer**	This company can receive shipments.

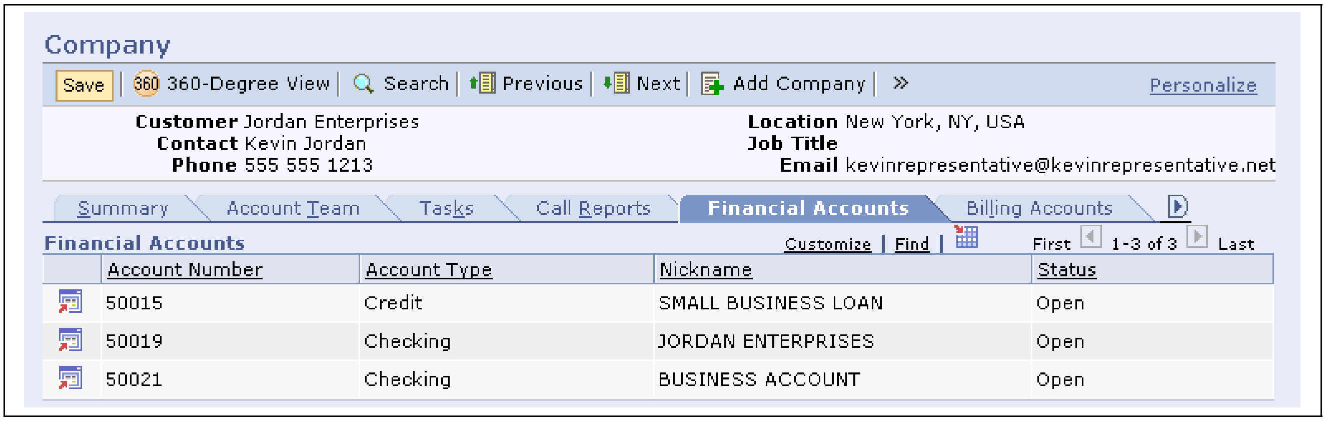
Company - Details page (3 of 3)

Explanations of these fields are provided in the *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook.*

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

Viewing Company Financial Accounts

Access the Company - Financial Accounts page.


Company
Save
360-Degree View
Search
Previous
Next
Add Company
Personalize
Summary
Account Team
Tasks
Call Reports
Financial Accounts
Billing Accounts
Customize | Find |
First 1-3 of 3 Last

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

Financial Accounts

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

Company - Financial Accounts page

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

See Also

Chapter 16, "Working with Financial Accounts," page 153

Setting Up and Maintaining Partnerships and Alternate Capacities

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

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

Understanding Set Up and Maintenance for Partnerships and Alternate Capacities

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

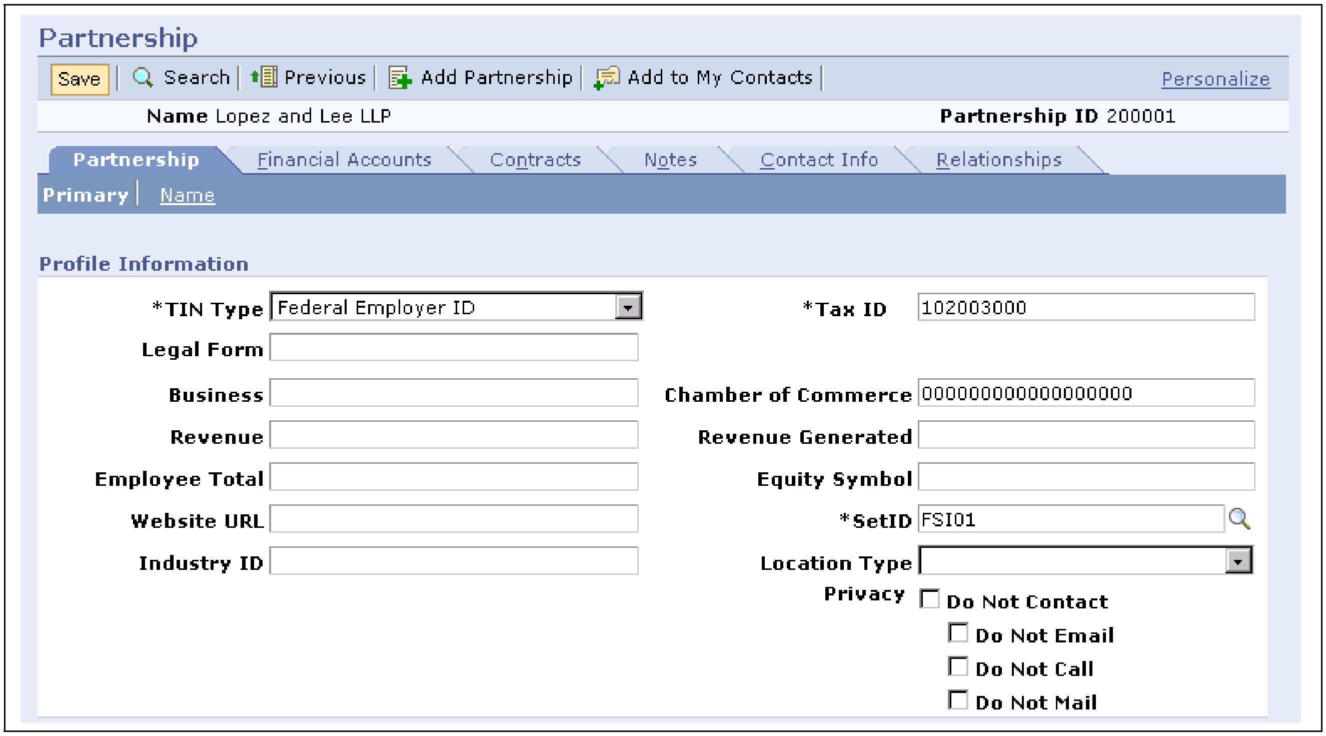
Pages Used to Set Up and Maintain Partnerships and Alternate Capacities

Page Name	Object Name	Navigation	Usage
Partnership	RBF_PARTSHP_2	Customers CRM, Partnership, Partnership	View and maintain name, profile, and contact information for a partnership.
Partnership - Financial Accounts	RBF_PARTSHP_ACCT	Customers CRM, Partnership, Partnership, Financial Accounts	View financial accounts associated with the partnership.
Partnership - Contracts	RBF_PARTSHP_ACNT	Customers CRM, Partnership, Partnership, Contracts	View contracts associated with the partnership.

Page Name	Object Name	Navigation	Usage
Partnership - Notes	RBF_PARTSHP_NOTE_2	Customers CRM, Partnership, Partnership, Notes	View and maintain notes and attachments associated with the partnership. This page uses core PeopleSoft CRM functionality.
Partnership - Contact Info	RBF_PRTSHP_CNTCT_2	Customers CRM, Partnership, Partnership, Contacts	View and maintain contacts associated with the partnership. This page uses core PeopleSoft CRM functionality.
Partnership - Relationships	RBF_PARTSHP_REL	Customers CRM, Partnership, Partnership, Relationships	View and maintain relationships associated with the partnership. This page uses core PeopleSoft CRM functionality.
Alternate Capacity	RBF_ALTCAP_MAIN_2	Customers CRM, Alternate Capacity, Alternate Capacity	View and maintain name, profile, and contact information for an alternate capacity.
Alternate Capacity - Financial Accounts	RBF_ALTCAP_ACCT	Customers CRM, Alternate Capacity, Alternate Capacity, Financial Accounts	View and maintain financial accounts associated with the alternate capacity.
Alternate Capacity - Contracts	RBF_ALTCAP_ACNT	Customers CRM, Alternate Capacity, Alternate Capacity, Contracts	View and maintain contracts associated with the alternate capacity.
Alternate Capacity - Notes	RBF_ALTCAP_NOTE_2	Customers CRM, Alternate Capacity, Alternate Capacity, Notes	View and maintain notes and attachments associated with the alternate capacity. This page uses core PeopleSoft CRM functionality.
Alternate Capacity - Contacts	RBF_ALTCAP_CNTCT_2	Customers CRM, Alternate Capacity, Alternate Capacity, Contacts	View and maintain contacts associated with the alternate capacity. This page uses core PeopleSoft CRM functionality.
Alternate Capacity - Relationships	RBF_ALTCAP_REL	Customers CRM, Alternate Capacity, Alternate Capacity, Relationships	View and maintain relationships associated with the alternate capacity. This page uses core PeopleSoft CRM functionality.

Viewing and Maintaining General Information

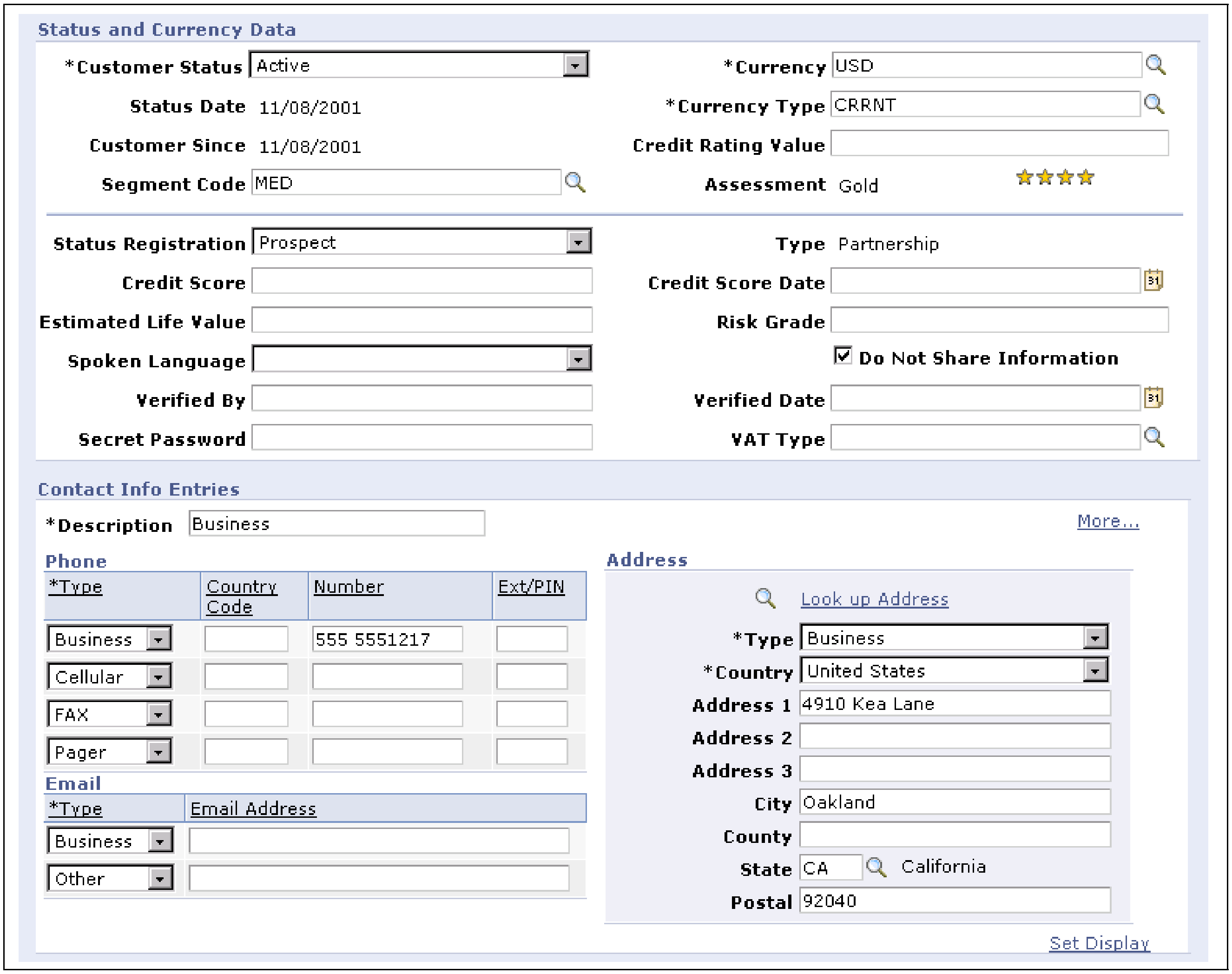
Access the Partnership page.


Partnership
Save
Search
Previous
Add Partnership
Add to My Contacts
Personalize
Partnership
Financial Accounts
Contracts
Notes
Contact Info
Relationships
Primary
Name
Profile Information

Name Lopez and Lee LLP
Partnership ID 200001

***TIN Type** Federal Employer ID
***Tax ID** 102003000
Legal Form
Business
Chamber of Commerce 000000000000000000
Revenue
Revenue Generated
Employee Total
Equity Symbol
Website URL
***SetID** FSI01
Industry ID
Location Type
Privacy ☐ Do Not Contact
☐ Do Not Email
☐ Do Not Call
☐ Do Not Mail

Partnership page (1 of 2)



Status and Currency Data

*Customer Status: Active
*Currency: USD
Status Date: 11/08/2001
*Currency Type: CRRNT
Customer Since: 11/08/2001
Credit Rating Value:
Segment Code: MED
Assessment: Gold ★★★★

Status Registration: Prospect
Type: Partnership
Credit Score:
Credit Score Date:
Estimated Life Value:
Risk Grade:
Spoken Language:
☑ Do Not Share Information
Verified By:
Verified Date:
Secret Password:
VAT Type:

Contact Info Entries

*Description: Business

Phone

*Type	Country Code	Number	Ext/PIN
Business		555 5551217	
Cellular			
FAX			
Pager			

Email

*Type	Email Address
Business	
Other	

Address

*Type: Business
*Country: United States
Address 1: 4910 Kea Lane
Address 2:
Address 3:
City: Oakland
County:
State: CA California
Postal: 92040

Partnership page (2 of 2)

Profile Information

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

TIN Type (taxpayer identification number type)	Select the taxpayer identification number type.
Taxpayer Identification Number	Enter the taxpayer identification number.
Legal Form	Enter the legal form of the partnership.
Business(Partnership only)	Define the partnership's business type for informational purposes.
Chamber of Commerce	Enter the Chamber of Commerce membership number.
Revenue(Partnership only)	Enter the annual revenue of the partnership.
Revenue Generated(Partnership only)	Enter the revenue generated by the partnership.

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

Status and Currency Data

Customer Status	Displays the status of the partnership record. Values are: *Active* or *Inactive.* The default value is *Active.*
Currency	Displays the currency code used for a monetary transaction with the partnership.
Status Date	Displays the date on which the current status value was specified.
Currency Type	Displays the exchange rate used to calculate monetary transaction amounts in alternate currencies.
Customer Since	Displays the date on which the partnership became a customer for your business.
Credit Rating Value	Displays the credit rating assigned to the partnership.
Segment Code	Displays the partnership's business segment for marketing purposes.
Assessment	Displays a graphical representation of the partnership rating.
Status Registration	Displays the status of the partnership's registration.
Type	Displays the type of business contact. Values are: *Person, Company, Partnership, Contact,* or *Alternate Capacity.*
Credit Score	Displays the partnership's credit score.
Credit Score Date	Displays the date on which the partnership's credit score was determined.
Estimated Life Value	Displays the total value of the partnership based on value in all accounts.
Risk Grade	Displays the risk to which the partnership exposes the financial services institution.
Spoken Language	Displays the language in which the partnership wants to interact.

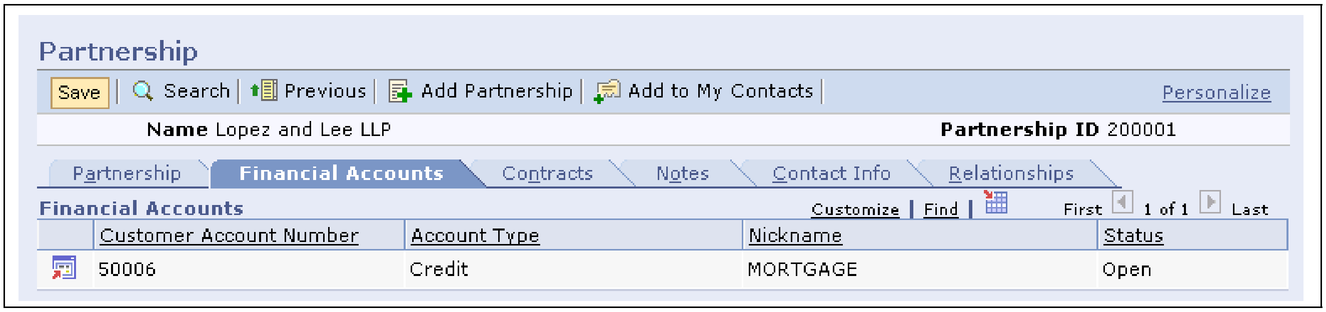
Do Not Share Information	Select if business contact information cannot be shared with any other department or telemarketers.
Verified By	Displays the financial services employee who verified the partnership's identification.
Verified Date	Displays the date on which the partnership identification took place.
Secret Password	Enter the password provided by the partnership to confirm identity.
VAT Type	Enter the VAT type if applicable.

Contact Info (Information) Entries

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

Viewing Financial Accounts

Access the Partnership - Financial Accounts page.


Partnership
Save
Search
Previous
Add Partnership
Add to My Contacts
Personalize
Partnership
Financial Accounts
Contracts
Notes
Contact Info
Relationships
Financial Accounts
Customize
Find
First
1 of 1
Last

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

Customer Account Number	Account Type	Nickname	Status
50006	Credit	MORTGAGE	Open

Partnership - Financial Accounts page

The page displays all financial accounts associated with the partnership.

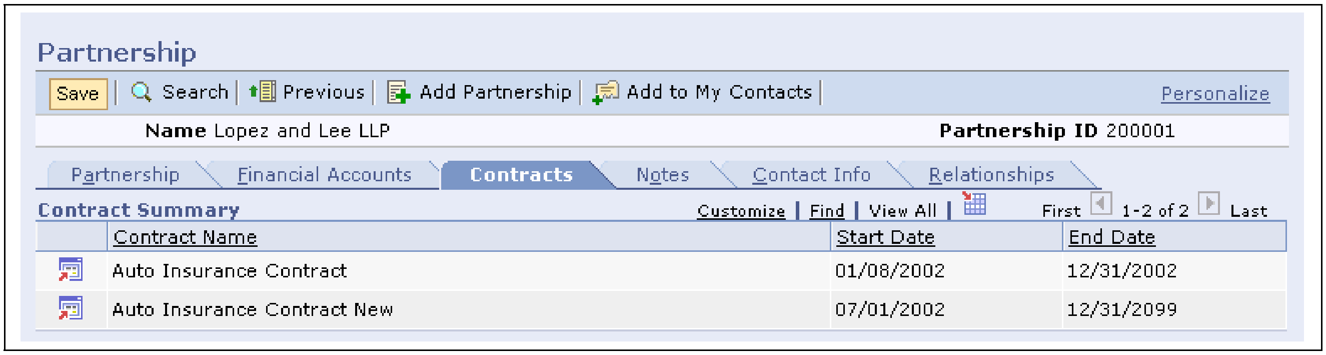
Viewing and Maintaining Contacts

Access the Partnership - Contact Info page.

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

Viewing Contracts

Access the Partnership - Contracts page.


Partnership
Save
Search
Previous
Add Partnership
Add to My Contacts
Personalize
Partnership
Financial Accounts
Contracts
Notes
Contact Info
Relationships
Customize | Find | View All
First 1-2 of 2 Last

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

Contract Summary

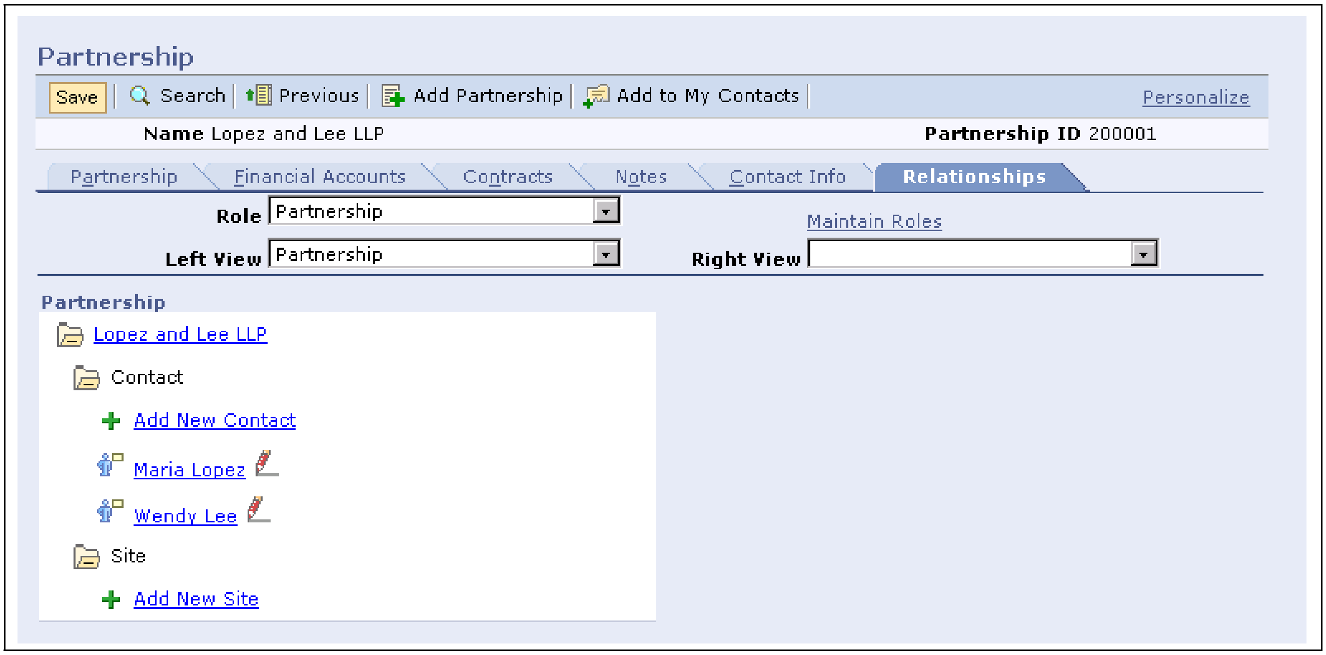
Contract Name	Start Date	End Date
Auto Insurance Contract	01/08/2002	12/31/2002
Auto Insurance Contract New	07/01/2002	12/31/2099

Partnership - Contracts page

The page displays all contracts associated with the partnership.

Maintaining Relationships

Access the Partnership - Relationships page.


Partnership
Save
Search
Previous
Add Partnership
Add to My Contacts
Personalize
Partnership
Financial Accounts
Contracts
Notes
Contact Info
Relationships
Maintain Roles
Partnership
Lopez and Lee LLP
Contact
Add New Contact
Maria Lopez
Wendy Lee
Site
Add New Site

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

Role Partnership

Left View Partnership **Right View**

Partnership - Relationships page

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “Working with the Relationship Viewer”.

Viewing and Maintaining Notes

Access the Partnership - Notes page.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Notes and Attachments”.

Setting Up Households

For complete information on setting up and maintaining households, see the *PeopleSoft Enterprise Client Management 9 PeopleBook.*

See *PeopleSoft Enterprise Client Management 9 PeopleBook*, “Working with Wealth Management,” Understanding Household Relationships.

CHAPTER 6

Setting Up Sites and Service Locations

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

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

Understanding Service Locations

This section discusses service locations and lists common elements.

Service Locations

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

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

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

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

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

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

A *service* is an object that is maintained on the RBF_SERVICE table. For each service location in your system you can associate services that are available at that location. The associated records are stored in RDFSITE_SERVICE, a child table of RD_SITE. You can also define the hours of operation for the location. Records for hours of operation are maintained on RDFSITE_OPERATE, a child table of site.

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

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Site Business Objects"

Common Elements Used in This Chapter

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

Setting Up and Maintaining Sites

This section discusses how to:

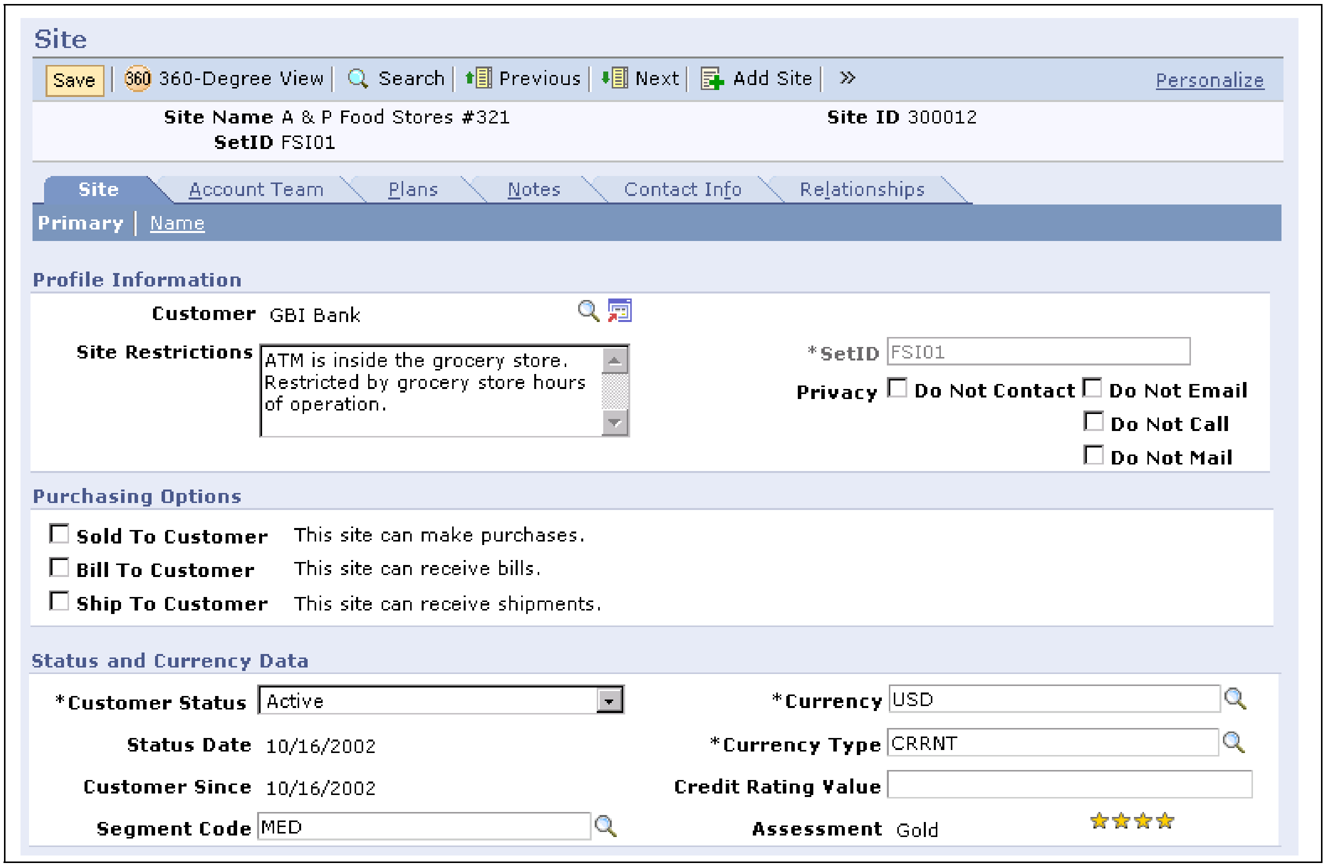
- Set up and maintain sites.
- Manage account teams.
- View account plans.
- Define notes.
- Define site contacts.
- Define site relationships.

Pages Used to Set Up and Maintain Sites

Page Name	Object Name	Navigation	Usage
Customers CRM - Site	RDFSITE_MAIN_2	• Customers CRM, Add Site, Site • Customers CRM, Search Site, Site	View and update primary information about the site, including name, address, phone, and email information.
Site - Account Team	RD_ACCOUNT_TEAM	• Customers CRM, Add Site, Account Team • Customers CRM, Search Site, Account Team	Manage the account team that is assigned to the site.
Site - Plans	RD_ACCOUNT_PLAN	• Customers CRM, Add Site, Plans • Customers CRM, Search Site, Plans	Create a new plan or view existing account plans for the site.
Site - Notes	RD_SITE_NOTE_2	• Customers CRM, Add Site, Site, Notes • Customers CRM, Search Site, Site, Notes	Add notes and attachments for the specified site.
Site - Contacts page	RD_SITE_CNTCT_2	• Customers CRM, Add Site, Contacts • Customers CRM, Search Site, Contacts	View and update site contact information.
Site - Relationships	RD_SITE_REL_2	• Customers CRM, Add Site, Relationships • Customers CRM, Search Site, Relationships	View site relationships.

Setting Up and Maintaining Sites

Access the Site page.


Site
Save
360-Degree View
Search
Previous
Next
Add Site
Personalize
Site
Account Team
Plans
Notes
Contact Info
Relationships
Primary
Name
Profile Information
Purchasing Options
Status and Currency Data

Site Name A & P Food Stores #321
SetID FSI01
Site ID 300012

Customer GBI Bank

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

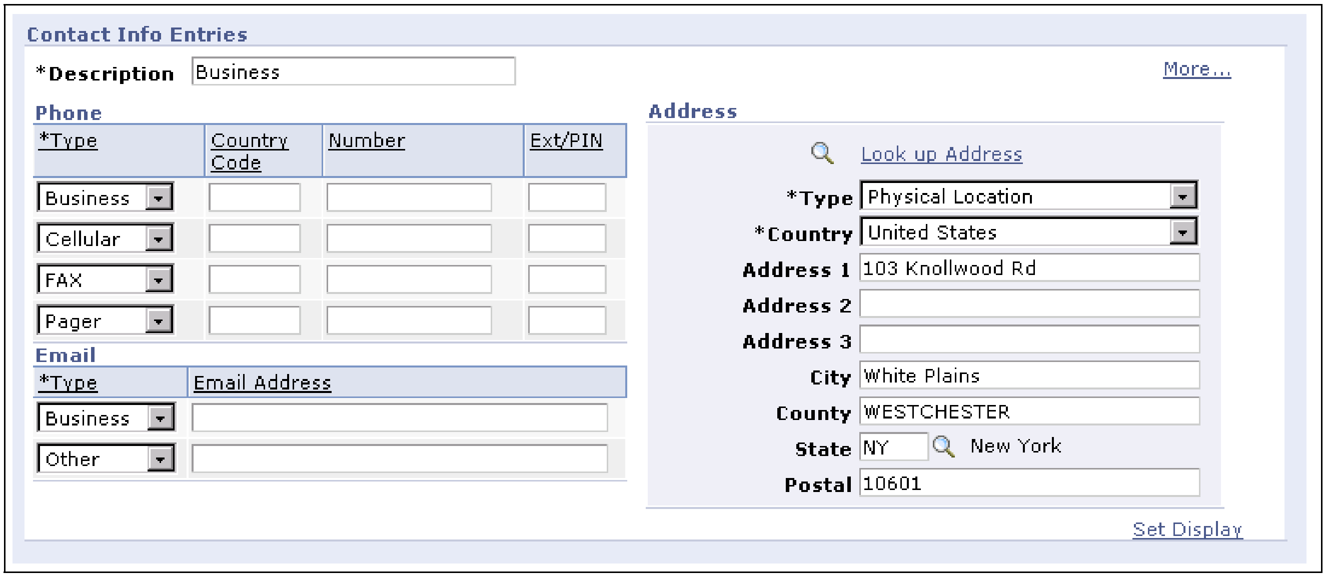
***SetID** FSI01

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

☐ **Sold To Customer**	This site can make purchases.
☐ **Bill To Customer**	This site can receive bills.
☐ **Ship To Customer**	This site can receive shipments.

***Customer Status** Active
Status Date 10/16/2002
Customer Since 10/16/2002
Segment Code MED
***Currency** USD
***Currency Type** CRRNT
Credit Rating Value
Assessment Gold ★★★★

Site page (1 of 2)


Contact Info Entries
More...
Phone
Email
Address
Look up Address
Set Display

***Description** Business

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

*Type	Email Address
Business	
Other	

***Type** Physical Location
***Country** United States
Address 1 103 Knollwood Rd
Address 2
Address 3
City White Plains
County WESTCHESTER
State NY New York
Postal 10601

Site page (2 of 2)

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

Managing the Account Team

Access the Site - Account Team page.

See *PeopleSoft Enterprise Strategic Account Planning 9 PeopleBook*, “Managing Accounts,” Assigning a Team to an Account.

Viewing Account Plans

Access the Site - Plans page.

See *PeopleSoft Enterprise Strategic Account Planning 9 PeopleBook*, “Creating Account Plans,” Creating Account Plans.

Defining Notes

Access the Site - Notes page.

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

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Notes and Attachments”.

Defining Site Contacts

Access the Site - Contacts page.

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

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “Defining Site Business Objects,” Maintaining Site Contacts.

Defining Site Relationships

Access the Site - Relationships page.

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

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “Defining Site Business Objects,” Defining Site Relationships.

Setting Up and Maintaining Service Location Information

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

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

- Define service location attributes.

Understanding Hours of Operation

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

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

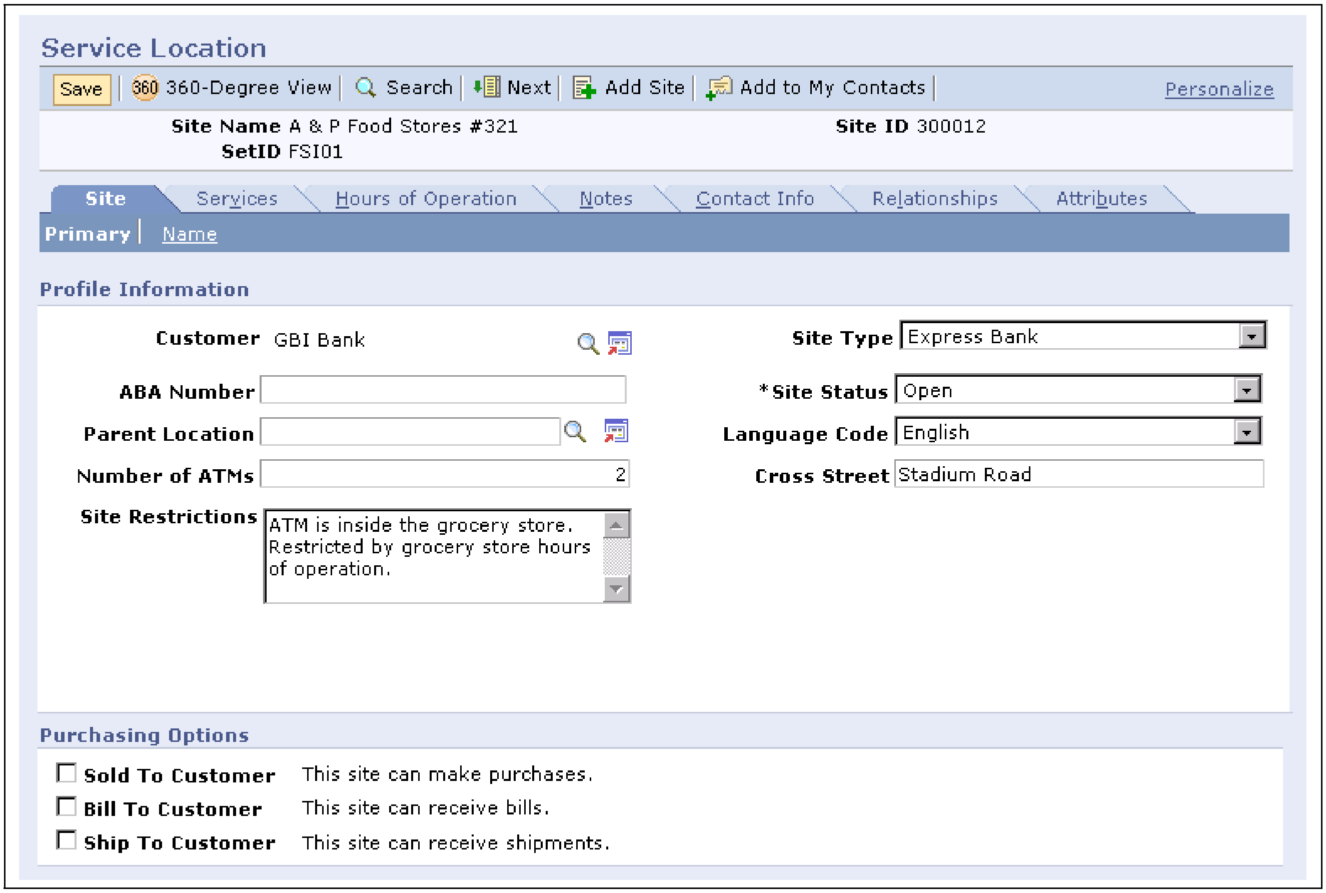
Pages Used to Set Up and Maintain Service Location Information

Page Name	Object Name	Navigation	Usage
Service Location - Site: Primary	RDFSITE_MAIN_2	• Financial Services, Add Service Location, Site Click the Primary link. • Financial Services, Search Service Location, Site Click the Primary link.	View and maintain name, profile, hours of operation, status and currency information for the service location.
Service Location - Site: Name	RDFSITE_MAIN_2	• Financial Services, Add Service Location, Site Click the Name link. • Financial Services, Search Service Location, Site Click the Name link.	View and maintain name.
Service Location - Services	RDFSITE_SERVICE_2	• Financial Services, Add Service Location, Site, Services • Financial Services, Search Service Location, Site, Services	Link the service locations to services that you have defined.
Service Location - Hours of Operation	RDFSITE_OPERATE_2	Financial Services, Service Location, Site, Hours of Operation	Set up the hours of operation and holidays for the service location.
Service Location - Notes	RD_SITE_NOTE_2	• Financial Services, Add Service Location, Site, Notes • Financial Services, Search Service Location, Site, Notes	Add notes and attachments for the service location.

Page Name	Object Name	Navigation	Usage
Service Location - Contact Info	RD_SITE_CNTCT_2	• Financial Services, Add Service Location, Site, Contacts • Financial Services, Search Service Location, Site, Contacts	Associate contacts with the service location.
Service Location - Relationships	RD_SITE_REL_2	• Financial Services, Add Service Location, Relationships • Financial Services, Search Service Location, Relationships	Define relationships for the service location.
Service Location - Attributes	RB_ATTR_RUN_SITE	• Financial Services, Add Service Location, Attributes • Financial Services, Search Service Location, Attributes	Define attributes for the service location.

Defining Service Location Sites

Access the Service Location - Site page.


Service Location
Save
360-Degree View
Search
Next
Add Site
Add to My Contacts
Personalize
Site
Services
Hours of Operation
Notes
Contact Info
Relationships
Attributes
Primary
Name

Site Name A & P Food Stores #321
SetID FSI01
Site ID 300012

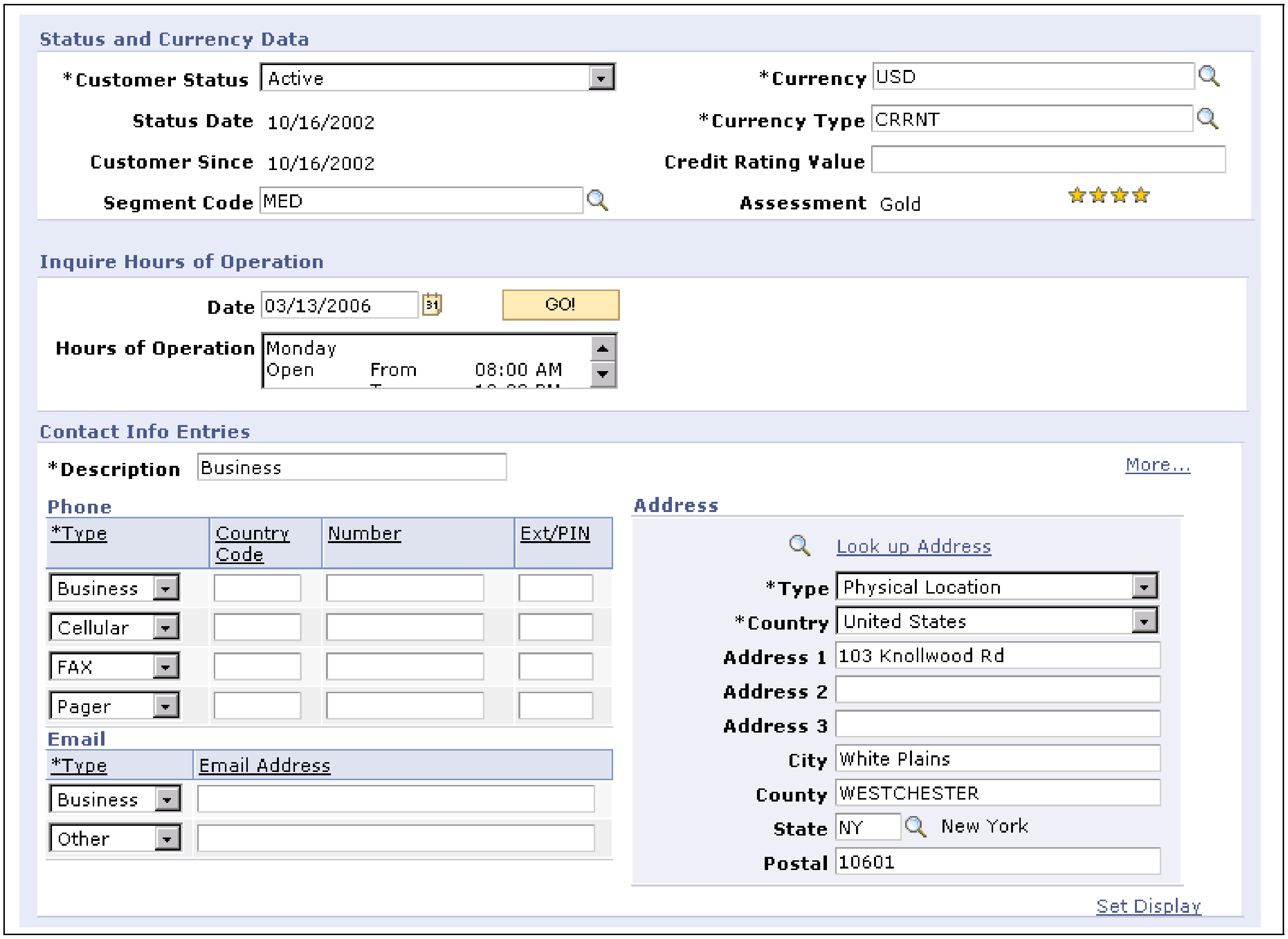
Profile Information

Customer GBI Bank
ABA Number
Parent Location
Number of ATMs 2
Site Restrictions ATM is inside the grocery store. Restricted by grocery store hours of operation.
Site Type Express Bank
***Site Status** Open
Language Code English
Cross Street Stadium Road

Purchasing Options

☐ **Sold To Customer** This site can make purchases.
☐ **Bill To Customer** This site can receive bills.
☐ **Ship To Customer** This site can receive shipments.

Service Location - Site page (1 of 2)



Status and Currency Data

*Customer Status: Active
*Currency: USD
Status Date: 10/16/2002
*Currency Type: CRRNT
Customer Since: 10/16/2002
Credit Rating Value:
Segment Code: MED
Assessment: Gold ★★★★

Inquire Hours of Operation

Date: 03/13/2006
Hours of Operation: Monday Open From 08:00 AM

Contact Info Entries

*Description: Business

Phone

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

Email

*Type	Email Address
Business	
Other	

Address

*Type: Physical Location
*Country: United States
Address 1: 103 Knollwood Rd
Address 2:
Address 3:
City: White Plains
County: WESTCHESTER
State: NY New York
Postal: 10601

Service Location - Site page (2 of 2)

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

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

Customer	Enter the name of the financial institution that is associated with the location.
Site Type	Select the site type from the drop-down list. Delivered values are: *ATM Machine, Corporate Bank, Corporate Insurance, Express Bank, Full Service Bank, Insurance Estimate Office,* and *Personal Insurance.* Site types are configurable based on setID.
ABA Number	Enter the American Banker's Association number.
Site Status	Select the site status from the drop-down list. Delivered values are: *Open, Closed, Pending Open,* and *Targeted for Closure*. Additional status types can be added to suit your organization's requirements.
Parent Location	Enter the location of the parent organization of the site.
Language Code	Select the language used in the service location.
Number of ATMs	Enter the number of ATMs available at the site.

Cross Street	Enter the name of the closest main intersection.
Site Restrictions	Enter information on restrictions at this site.

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

Date	Select a date and click Go to display the hours of operation for that date.

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

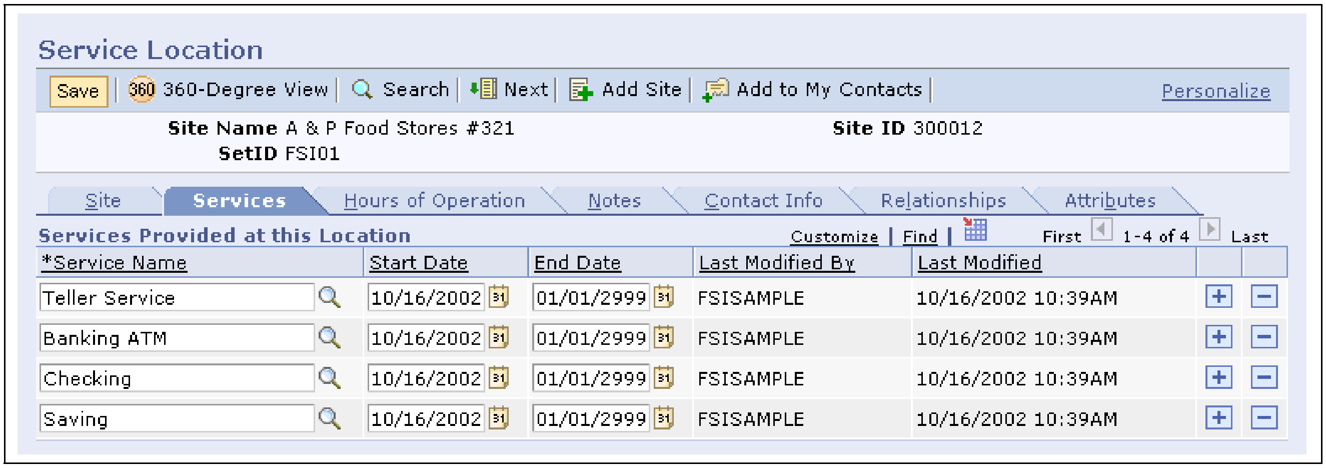
Customer Status	Indicate whether the service location record is *Active* or *Inactive.* The default value is *Active.*
Status Date	The date that the current customer status value was specified.
Customer Since	The date the service location became a customer for your business.
Currency Code	Enter the code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

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Company Business Objects," Defining Company Contacts

Defining Service Location Services

Access the Service Location - Services page.



Site Name A & P Food Stores #321 **Site ID** 300012
SetID FSI01

Services Provided at this Location

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

Service Location - Services page

Service Name	Select a service that will be available at the service location. Services are defined on the Services page.
Start Date and **End Date**	Select the start date for the service and end date, if applicable.

Defining Service Location Hours of Operation

To set up hours of operation:

1. Set up record for majority hours of operation.

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

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

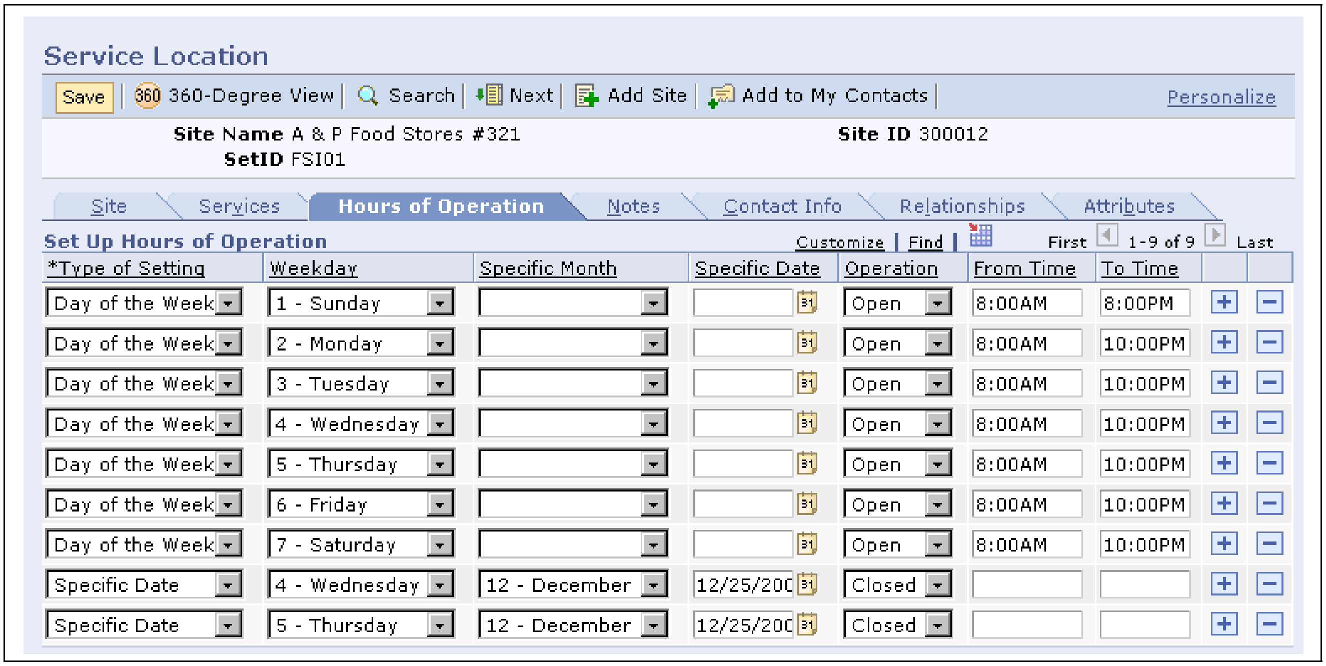
   This will override the setting in step one for all Thursdays.

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

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

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

Access the Service Location - Hours of Operation page.



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

SetID FSI01

Set Up Hours of Operation

*Type of Setting	Weekday	Specific Month	Specific Date	Operation	From Time	To Time
Day of the Week	1 - Sunday			Open	8:00AM	8:00PM
Day of the Week	2 - Monday			Open	8:00AM	10:00PM
Day of the Week	3 - Tuesday			Open	8:00AM	10:00PM
Day of the Week	4 - Wednesday			Open	8:00AM	10:00PM
Day of the Week	5 - Thursday			Open	8:00AM	10:00PM
Day of the Week	6 - Friday			Open	8:00AM	10:00PM
Day of the Week	7 - Saturday			Open	8:00AM	10:00PM
Specific Date	4 - Wednesday	12 - December	12/25/200	Closed		
Specific Date	5 - Thursday	12 - December	12/25/200	Closed		

Service Location - Hours of Operation page

Type of Setting	Select *Day of the Week* or *Specific Date* to determine how you will define the hours of operation. When you choose *Day of the Week*, you do not need to fill in the specific date field. You can optionally fill in the *Weekday* and *Specific Month* field.

	When you choose *Specific Date*, the Specific Date field must be filled in, and Weekday and Specific Month fields will be defaulted by date field. If Specific Date is defined, then the system will use it for hours of operation, ignoring any data defined in type of Day of the Week.
Weekday	Use this field in conjunction with the *Day of the Week* type of setting.
Specific Month	Use this field in conjunction with the *Day of the Week* type of setting. This field can be used to specify the hours of operation for all Tuesdays in a month.
Specific Date	Select a specific date to define the hours of operation.
Operation	Select *Open* or *Closed.*
From Time/To Time	Use the from and to times to define hours of operation.

Defining Service Location Notes

Access the Service Location - Notes page.

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

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Working with Notes and Attachments"

Defining Service Location Contacts

Access the Service Location - Contacts page.

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

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Working with Contacts"

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Company Business Objects," Defining Company Contacts

Defining Service Location Relationships

Access the Service Location - Relationships page.

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

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Working with the Relationship Viewer"

Defining Service Location Attributes

Access the Service Location - Attributes page.

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

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Configuring Attributes”

Setting Up Services

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

This section discusses how to:

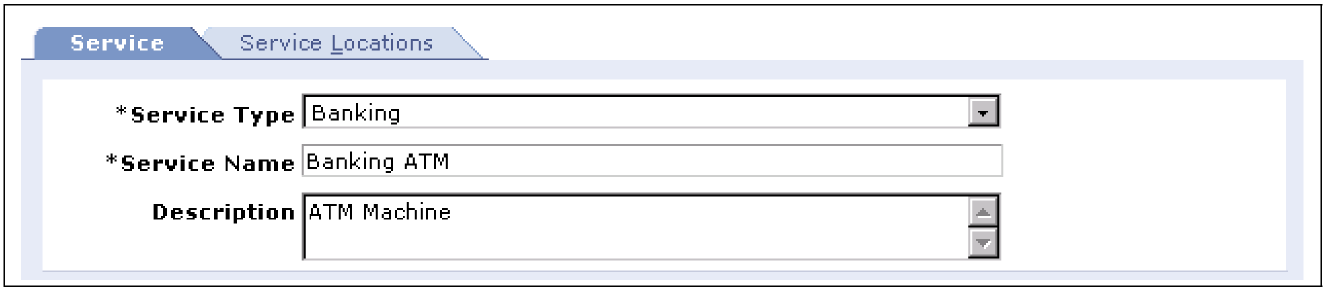
- Define a service.
- Link the service with service locations.

Pages Used to Set Up Services

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

Defining a Service

Access the Service page.



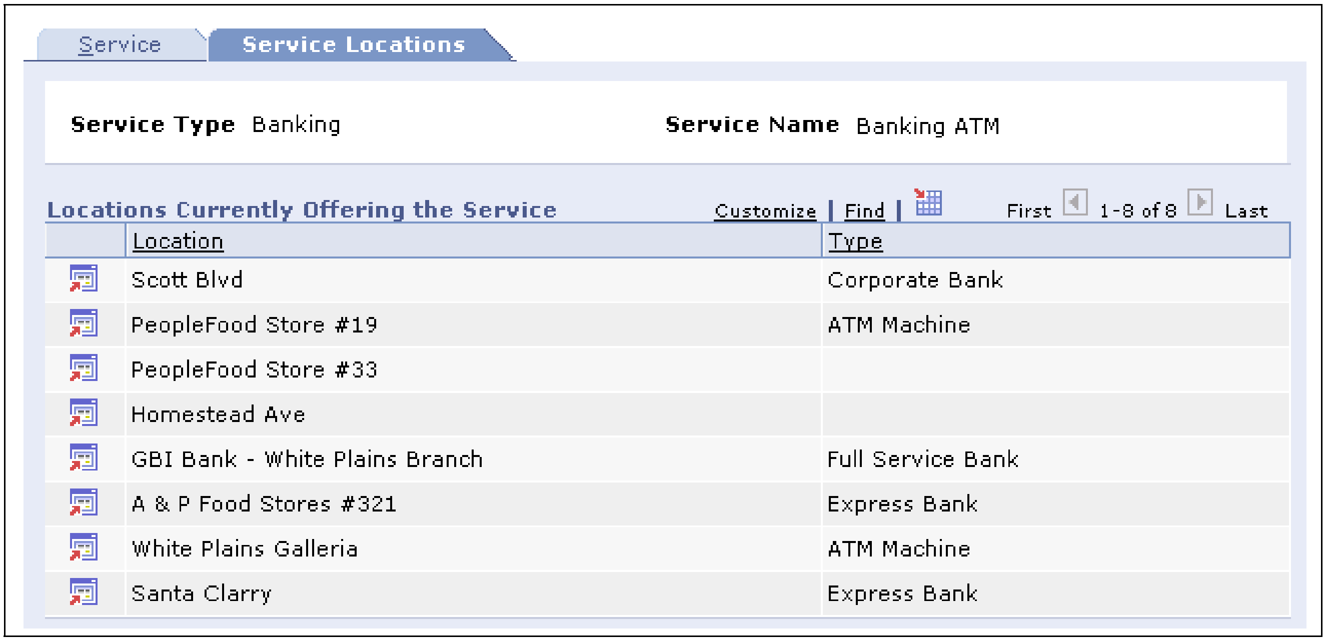
*Service Type: Banking
*Service Name: Banking ATM
Description: ATM Machine

Service page

Service Type	Select the service type. Delivered values are: *Banking, Business Banking, Insurance, Loan Service, Mortgage, Personal Banking,* and *Wealth Management*. Additional service types can be added to suit your organization’s requirements.
Service name	Enter the name of the service offered.
Description	Describe the service offered.

Linking the Service with Service Locations

Access the Service Locations page.



Service Type Banking **Service Name** Banking ATM

Locations Currently Offering the Service

Location	Type
Scott Blvd	Corporate Bank
PeopleFood Store #19	ATM Machine
PeopleFood Store #33	
Homestead Ave	
GBI Bank - White Plains Branch	Full Service Bank
A & P Food Stores #321	Express Bank
White Plains Galleria	ATM Machine
Santa Clarry	Express Bank

Service Locations page

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

Working with the Service Location Finder

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

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

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

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

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

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

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

CHAPTER 7

Understanding the 360-Degree View for Industries

This chapter discusses:

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

The 360-Degree View

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

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

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up the 360-Degree View" and *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Using the 360-Degree View".

Transactions in the 360-Degree View

The 360-Degree View page that PeopleSoft delivers enables you to view or perform transactions on behalf of the customer or company. The transactions that you can perform appear in the Actions drop-down box on the upper right corner of the 360-Degree View page. This section discusses:

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

Transactions Common to All Industries

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

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

Transactions for the Financial Services Industries

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

Transaction	Description
Account Address Change	Change the address for selected accounts.
Account Nickname	Add or change an account nickname.
Automatic Funds Transfer	Automate transfer with account, frequency, start and end date.
Pay Bills	View current bill payees or set up new payee information.
Reverse Transaction Fee	Back out transaction fees that have already been charged.
Issue ATM Card	Modify an existing card or issue a new card.
Modify Account	Modify details on an account such as the account fee, account relationships, credit card parameters, currency, product, status, or TIN type and number.
Order Cashier's Check	Order a cashier's check and provide delivery details.
Order Copy of Check	Order duplicate copy of an existing check.
Order Copy of Statement	Order duplicate copy of statement.
Order Foreign Currency	Enter account and delivery details for foreign currency order.
Order Traveler's Checks	Enter account, denomination, and delivery details for traveler's checks.

Transaction	Description
Reorder Checkbook	Order new checkbook with starting number information.
Stop Check Payment	Stop payment on a check.
Transfer Funds	One time fund transfer between accounts with account and amount information.

Transactions for the Insurance Industry

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

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

Transactions for the Communications Industry

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

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

Transactions for the Energy Industry

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

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

CHAPTER 8

Configuring Application Security

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

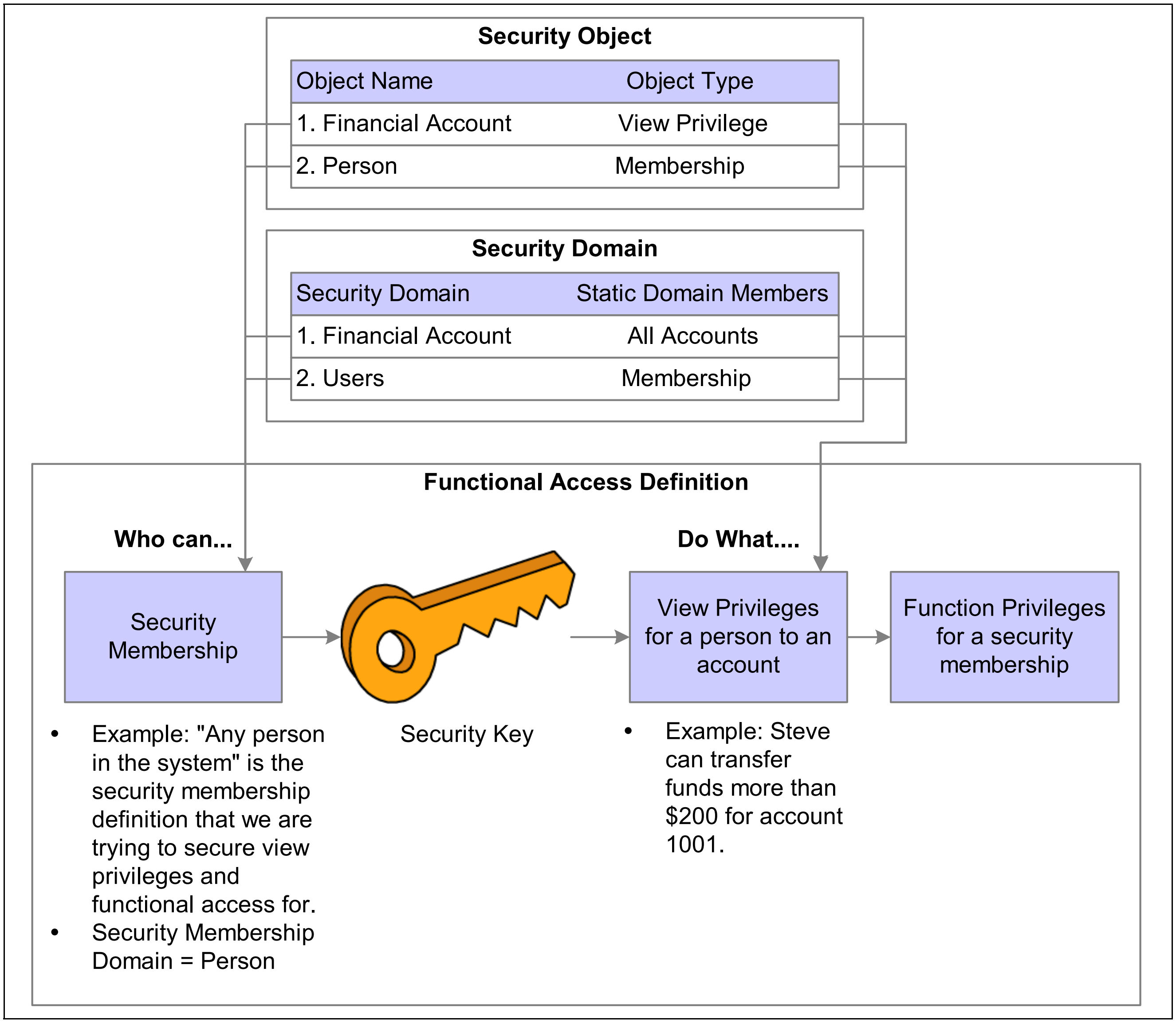
See Also

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

Understanding the Security Object Model

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

The following diagram shows the process flow of the Security Object model.


Security Object
Object Name
Object Type
1. Financial Account
View Privilege
2. Person
Membership
Security Domain
Security Domain
Static Domain Members
1. Financial Account
All Accounts
2. Users
Membership
Functional Access Definition
Who can...
Do What....
Security Membership
View Privileges for a person to an account
Function Privileges for a security membership
Security Key
Example: "Any person in the system" is the security membership definition that we are trying to secure view privileges and functional access for.
Security Membership Domain = Person
Example: Steve can transfer funds more than $200 for account 1001.

Security Object model

Security Objects

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

Security Membership Domain

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

Security Keys

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

Defining and Maintaining Security

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

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

Understanding Security Definition and Maintenance

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

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

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

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

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

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

To maintain the security matrix, use the RBF_SRTY_MTRX_SRCH component.

To review access trace information, use the RBF_SRTY_ACTR_SRCH component.

To set up navigation security, use the RBF_NAV_SECURITY component.

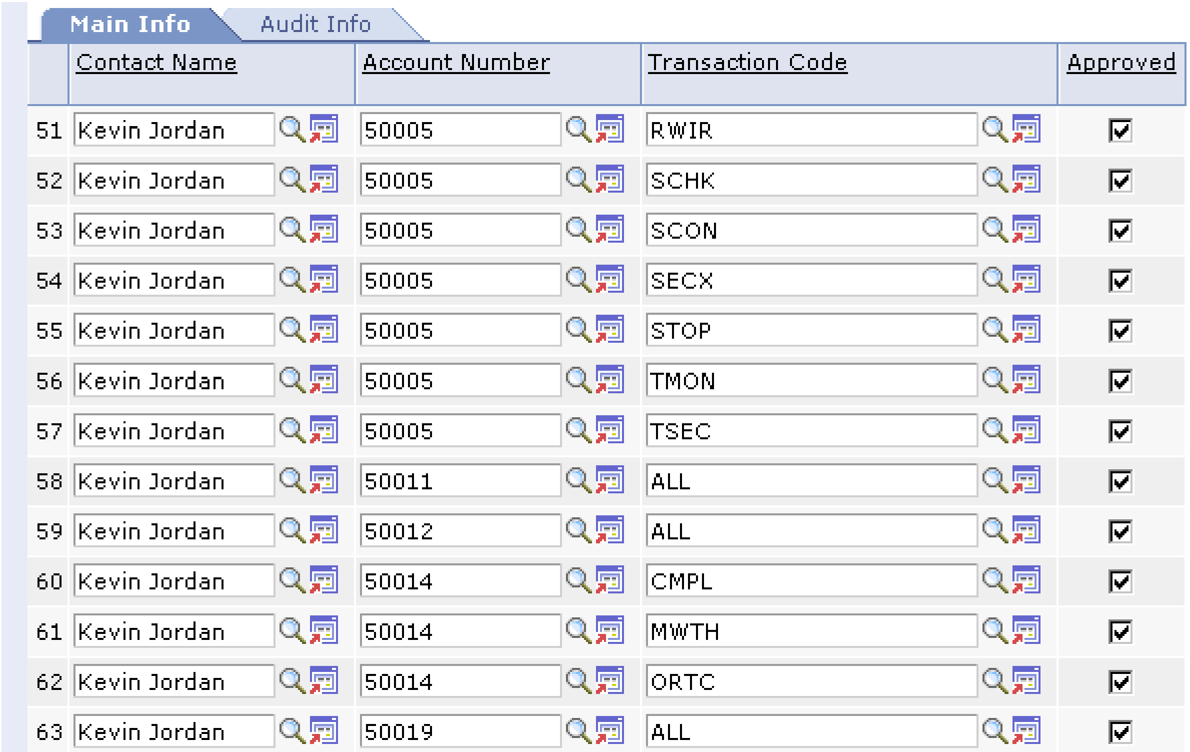
To define role mapping, use the RBF_ROLE_MAPPING component.

Pages Used to Define and Maintain Security

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

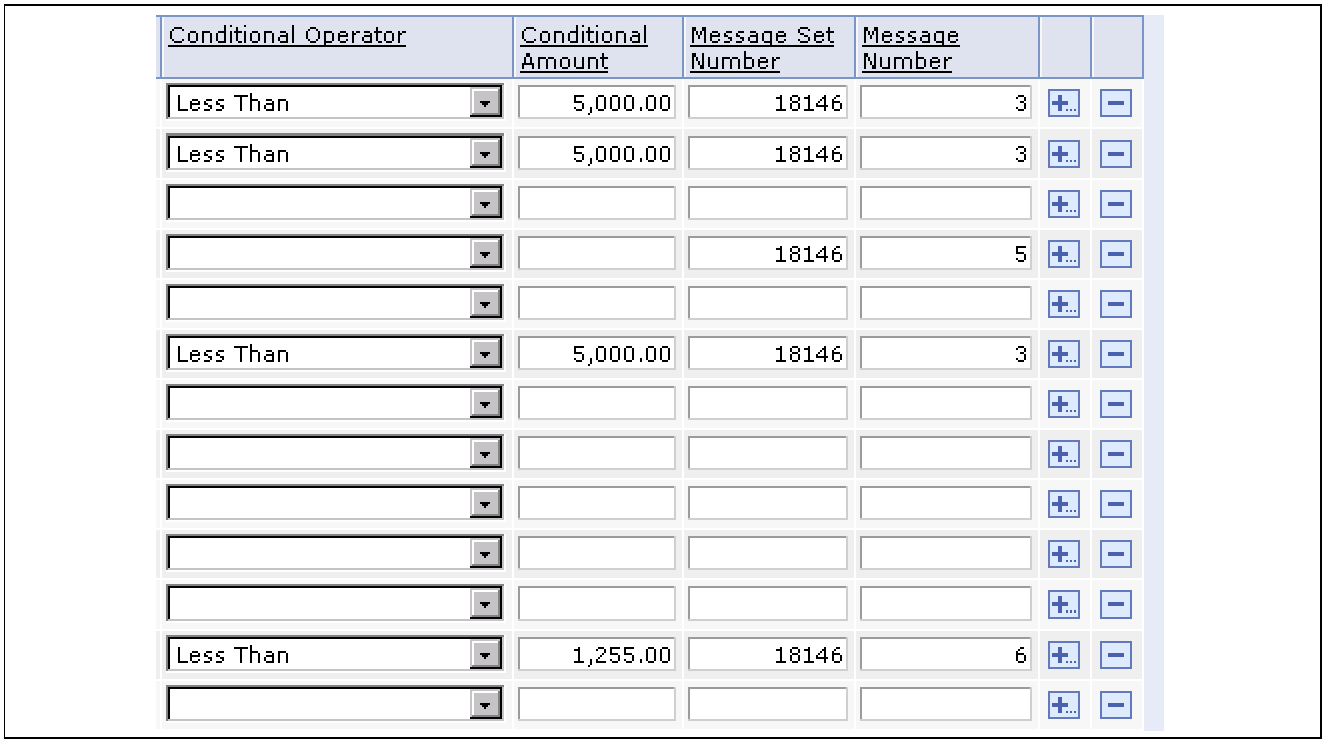
Maintaining the Security Matrix

Access the Security Matrix page.



	Contact Name	Account Number	Transaction Code	Approved
51	Kevin Jordan	50005	RWIR	☑
52	Kevin Jordan	50005	SCHK	☑
53	Kevin Jordan	50005	SCON	☑
54	Kevin Jordan	50005	SECX	☑
55	Kevin Jordan	50005	STOP	☑
56	Kevin Jordan	50005	TMON	☑
57	Kevin Jordan	50005	TSEC	☑
58	Kevin Jordan	50011	ALL	☑
59	Kevin Jordan	50012	ALL	☑
60	Kevin Jordan	50014	CMPL	☑
61	Kevin Jordan	50014	MWTH	☑
62	Kevin Jordan	50014	ORTC	☑
63	Kevin Jordan	50019	ALL	☑

Security Matrix page (1 of 2)



Conditional Operator	Conditional Amount	Message Set Number	Message Number
Less Than	5,000.00	18146	3
Less Than	5,000.00	18146	3
		18146	5
Less Than	5,000.00	18146	3
Less Than	1,255.00	18146	6

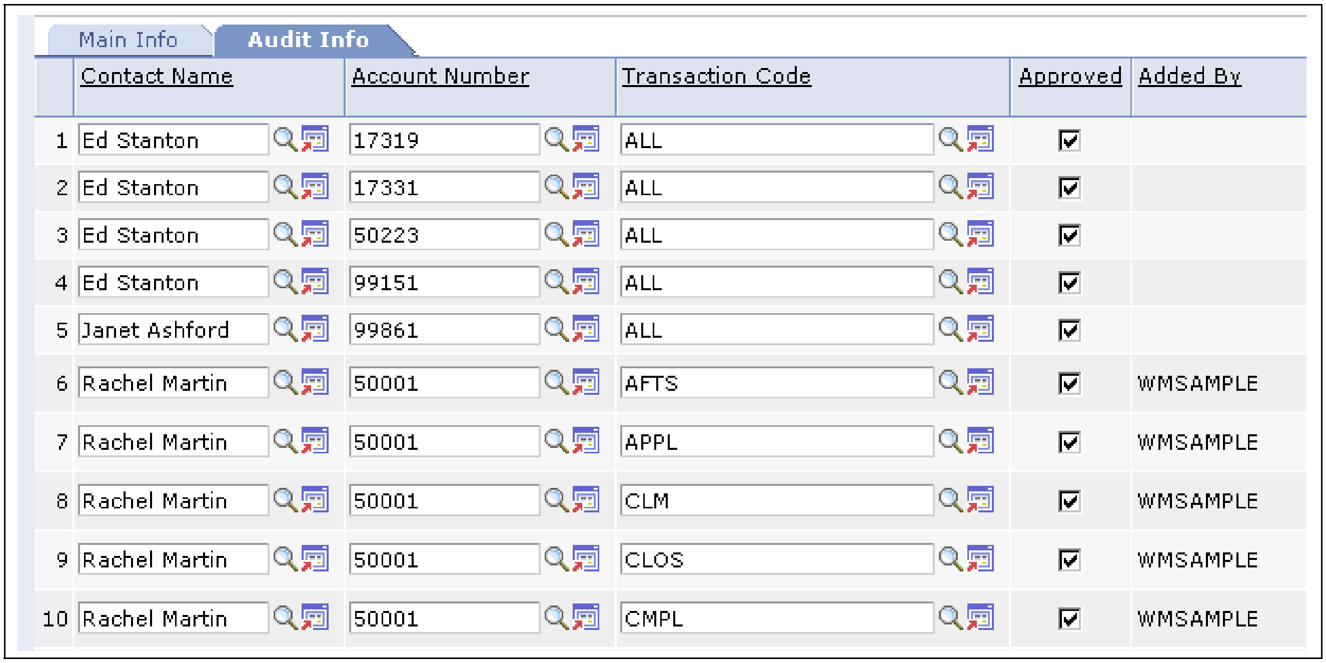
Security Matrix page (2 of 2)

Main Info Page

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

Audit Info Page

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


Main Info
Audit Info

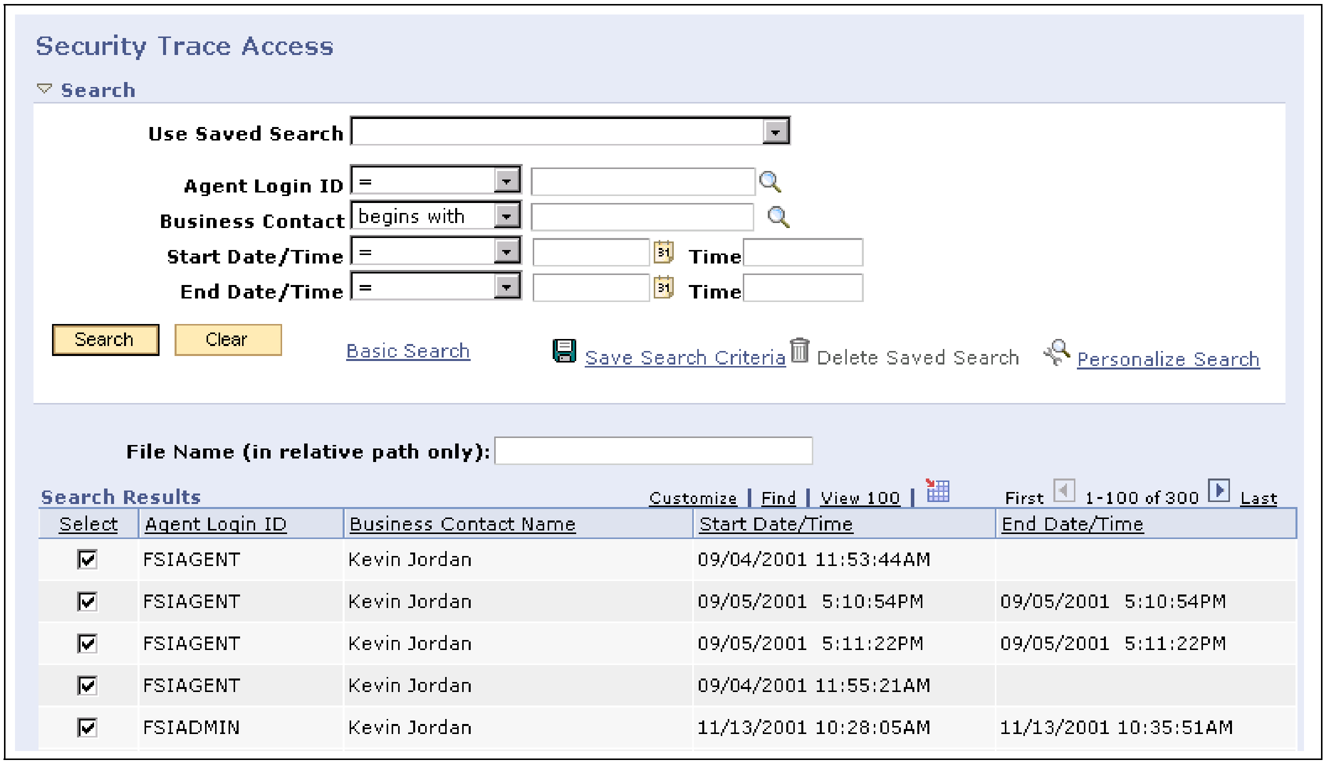
	Contact Name	Account Number	Transaction Code	Approved	Added By
1	Ed Stanton	17319	ALL	☑	
2	Ed Stanton	17331	ALL	☑	
3	Ed Stanton	50223	ALL	☑	
4	Ed Stanton	99151	ALL	☑	
5	Janet Ashford	99861	ALL	☑	
6	Rachel Martin	50001	AFTS	☑	WMSAMPLE
7	Rachel Martin	50001	APPL	☑	WMSAMPLE
8	Rachel Martin	50001	CLM	☑	WMSAMPLE
9	Rachel Martin	50001	CLOS	☑	WMSAMPLE
10	Rachel Martin	50001	CMPL	☑	WMSAMPLE

Security Matrix page: Audit Info tab

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

Reviewing Access Trace Information

Access the Security Trace Access page.


Security Trace Access
Search
Search
Clear
Basic Search
Save Search Criteria
Delete Saved Search
Personalize Search
Search Results
Customize | Find | View 100 |
First 1-100 of 300 Last

Use Saved Search

Agent Login ID =

Business Contact begins with

Start Date/Time = Time

End Date/Time = Time

File Name (in relative path only):

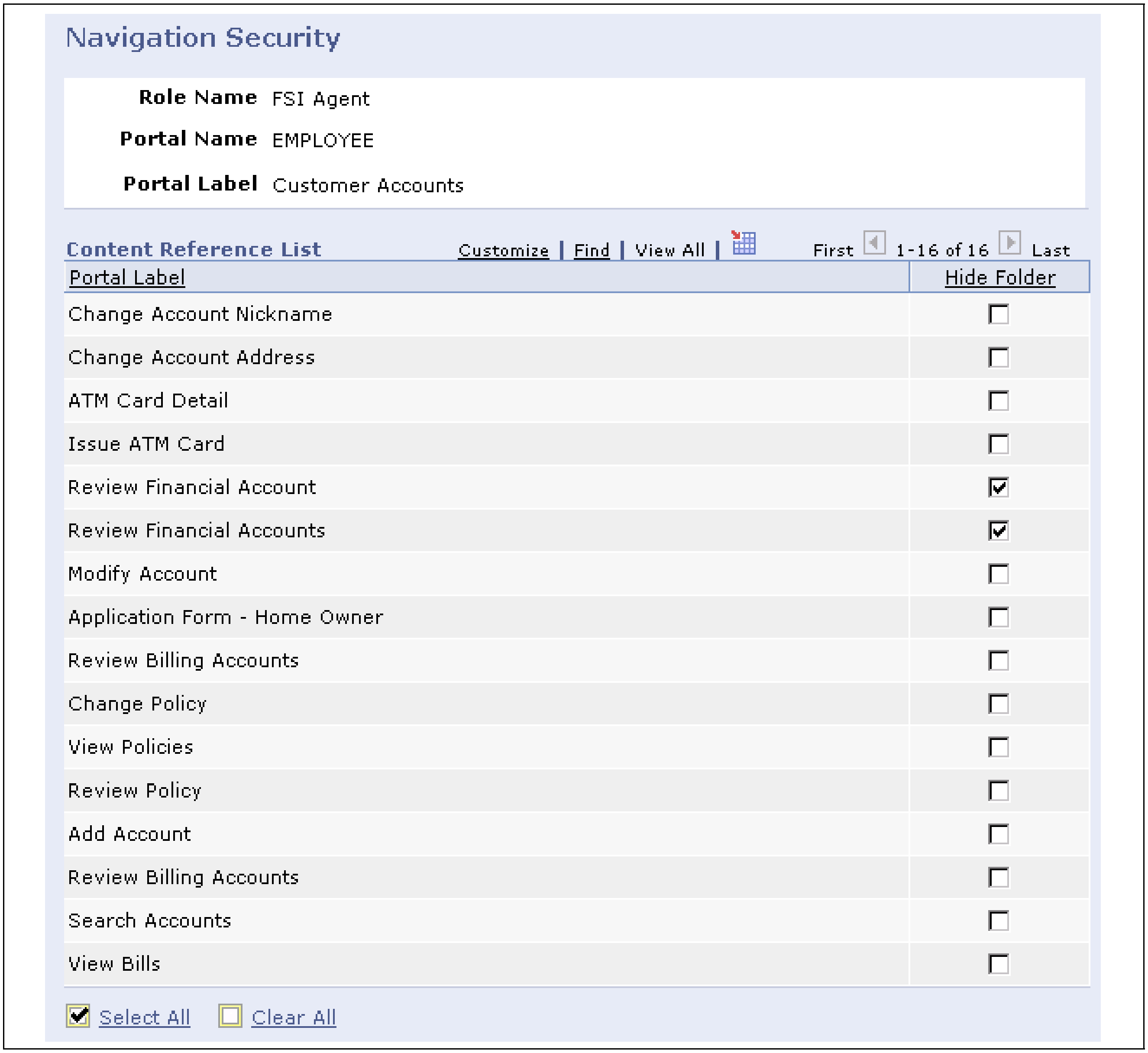
Select	Agent Login ID	Business Contact Name	Start Date/Time	End Date/Time
☑	FSIAGENT	Kevin Jordan	09/04/2001 11:53:44AM	
☑	FSIAGENT	Kevin Jordan	09/05/2001 5:10:54PM	09/05/2001 5:10:54PM
☑	FSIAGENT	Kevin Jordan	09/05/2001 5:11:22PM	09/05/2001 5:11:22PM
☑	FSIAGENT	Kevin Jordan	09/04/2001 11:55:21AM	
☑	FSIADMIN	Kevin Jordan	11/13/2001 10:28:05AM	11/13/2001 10:35:51AM

Security Trace Access page

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

Setting Up Navigation Security

Access the Navigation Security page.



Navigation Security

Role Name FSI Agent

Portal Name EMPLOYEE

Portal Label Customer Accounts

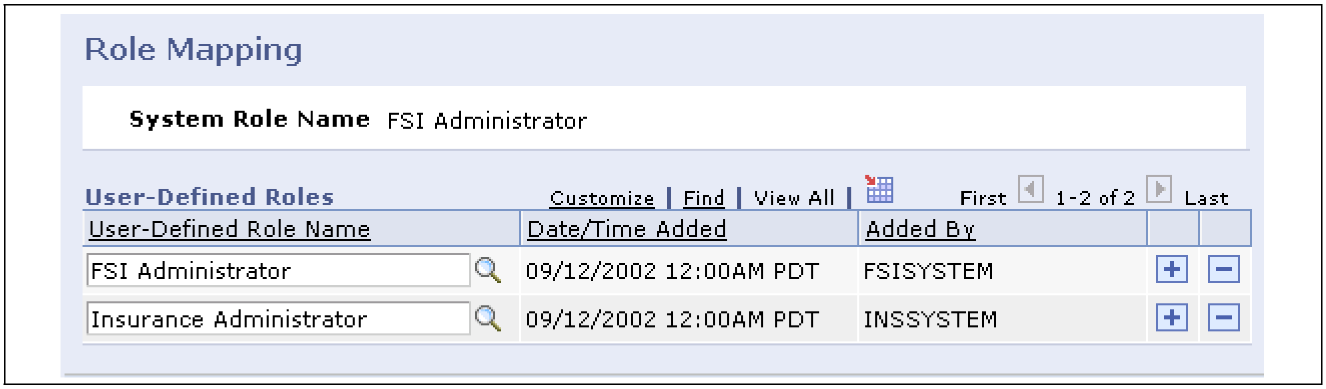
Portal Label	Hide Folder
Change Account Nickname	☐
Change Account Address	☐
ATM Card Detail	☐
Issue ATM Card	☐
Review Financial Account	☑
Review Financial Accounts	☑
Modify Account	☐
Application Form - Home Owner	☐
Review Billing Accounts	☐
Change Policy	☐
View Policies	☐
Review Policy	☐
Add Account	☐
Review Billing Accounts	☐
Search Accounts	☐
View Bills	☐

Navigation Security page

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

Defining Role Mapping

Access the Role Mapping page.



Role Mapping

System Role Name FSI Administrator

User-Defined Roles

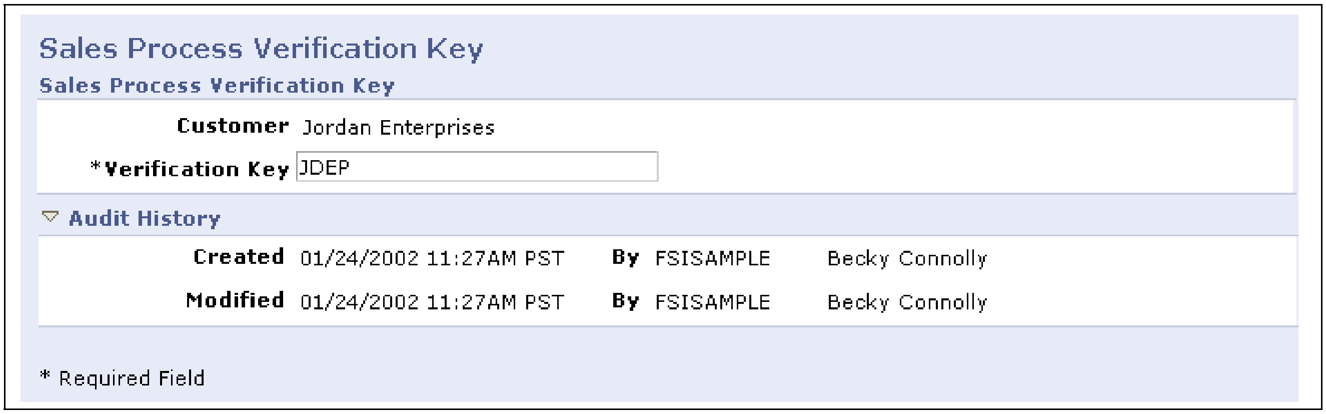
User-Defined Role Name	Date/Time Added	Added By
FSI Administrator	09/12/2002 12:00AM PDT	FSISYSTEM
Insurance Administrator	09/12/2002 12:00AM PDT	INSSYSTEM

Role Mapping page

System Role Name	Lists the system-defined roles delivered.
User - Defined Role Name	Lists the customer’s roles that will be mapped to the system-defined roles.

Defining Sales Process Verification Keys

Access the Sales Process Verification Key page.



Sales Process Verification Key

Sales Process Verification Key

Customer Jordan Enterprises

*Verification Key JDEP

Audit History

Created 01/24/2002 11:27AM PST By FSISAMPLE Becky Connolly

Modified 01/24/2002 11:27AM PST By FSISAMPLE Becky Connolly

* Required Field

Sales Process Verification Key page

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

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Setting Up Security and User Preferences”

CHAPTER 9

Working with Churn Management

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

Understanding Churn Management

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

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

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

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

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

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

Understanding the Churn Management Process Flow

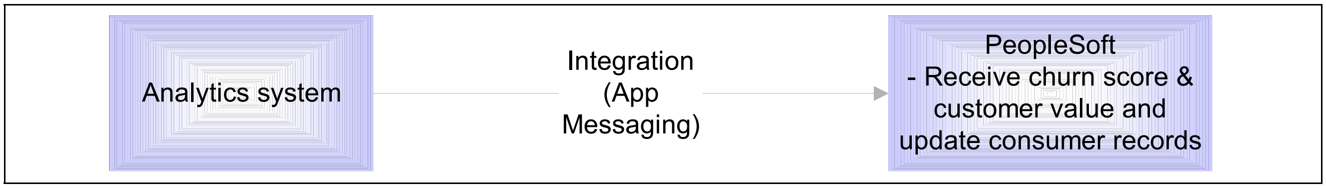
The following diagrams illustrate the business process flow for churn management in two parts:

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

Update Consumer Records

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

This diagram shows the churn management process flow:

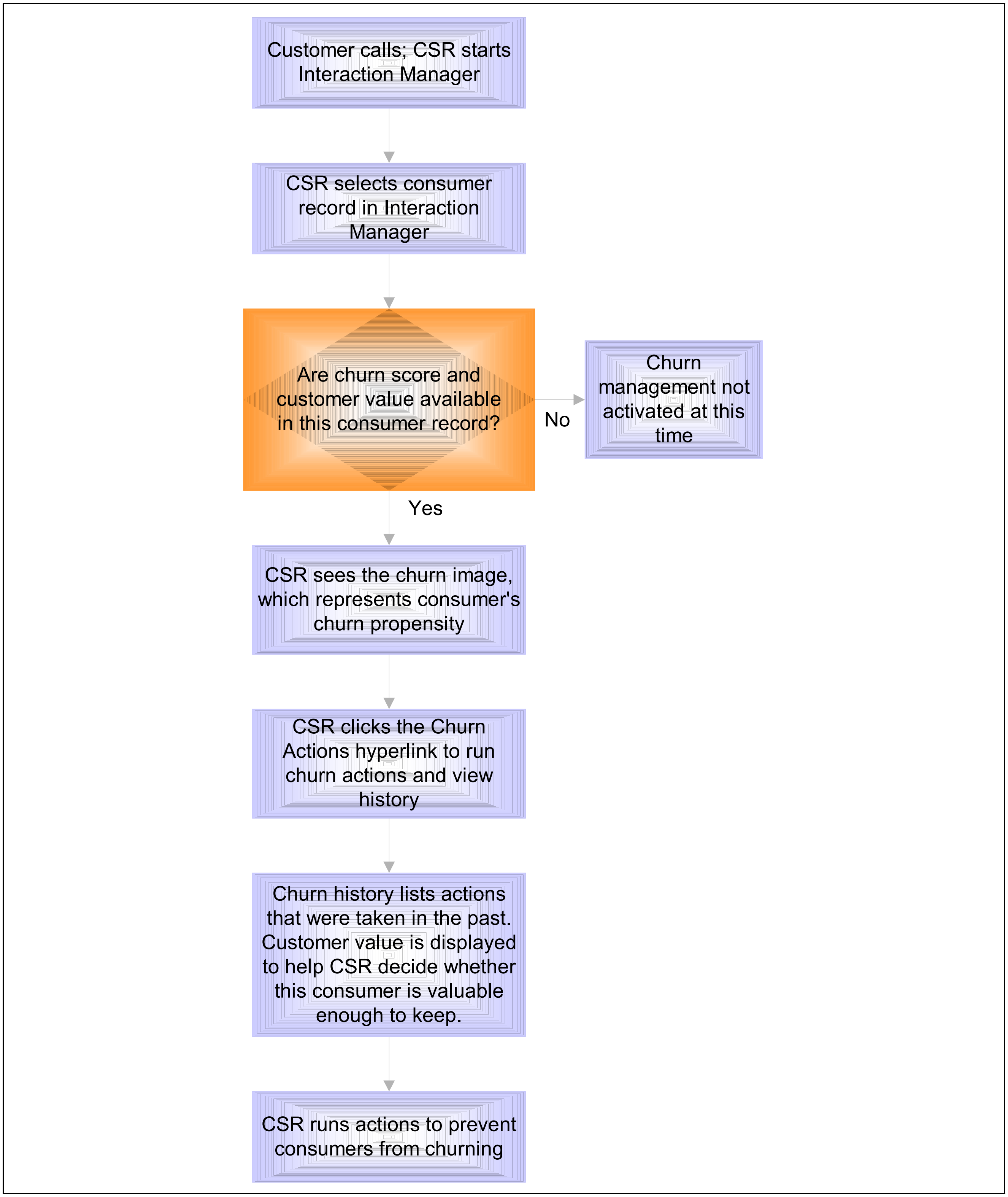

Analytics system
Integration (App Messaging)
PeopleSoft - Receive churn score & customer value and update consumer records

Churn management integration

Use of Churn Management in the 360-Degree View

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

This diagram shows the churn management process flow:


Customer calls; CSR starts Interaction Manager
CSR selects consumer record in Interaction Manager
Are churn score and customer value available in this consumer record?
No
Churn management not activated at this time
Yes
CSR sees the churn image, which represents consumer's churn propensity
CSR clicks the Churn Actions hyperlink to run churn actions and view history
Churn history lists actions that were taken in the past. Customer value is displayed to help CSR decide whether this consumer is valuable enough to keep.
CSR runs actions to prevent consumers from churning

Churn management business process flow

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

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework".

Maintaining Churn Management

This section discuss how to:

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

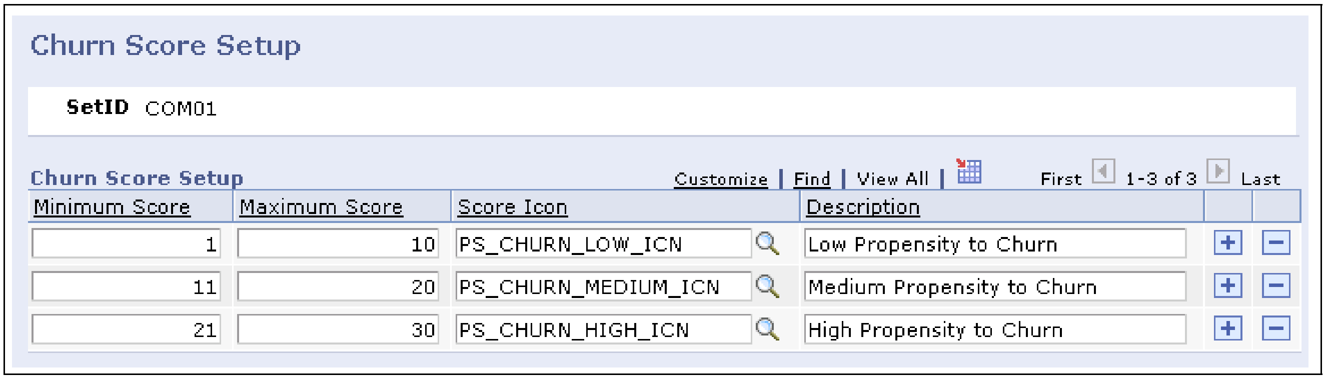
To define churn scores, use the RBT_CHURN_SETUP component.

Pages Used to Manage Churn

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

Defining Churn Scores

Access the Churn Score Setup page.



Churn Score Setup

SetID COM01

Churn Score Setup

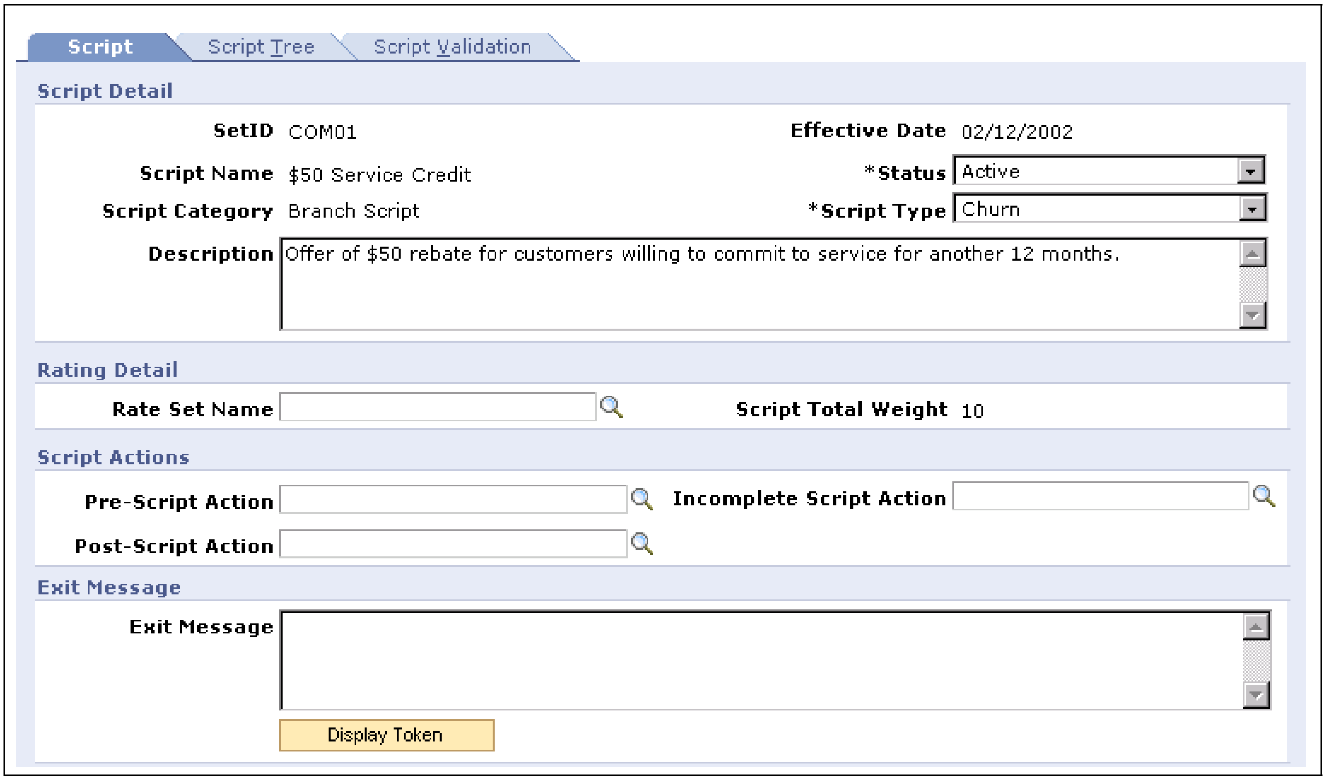
Minimum Score	Maximum Score	Score Icon	Description
1	10	PS_CHURN_LOW_ICN	Low Propensity to Churn
11	20	PS_CHURN_MEDIUM_ICN	Medium Propensity to Churn
21	30	PS_CHURN_HIGH_ICN	High Propensity to Churn

Churn Score Setup page

SetID	Display the setID of the churn.
Minimum Score	Enter the minimum score of the churn rule.
Maximum Score	Enter the maximum score of the churn rule.
Score Icon	Click to select the icon that will be displayed in Interaction Manager when the customer churn score falls in this range.
Description	Enter a description of the associated churn event.

Defining Scripts

Access the Script page.



Script Detail

SetID COM01 **Effective Date** 02/12/2002

Script Name $50 Service Credit ***Status** Active

Script Category Branch Script ***Script Type** Churn

Description Offer of $50 rebate for customers willing to commit to service for another 12 months.

Rating Detail

Rate Set Name **Script Total Weight** 10

Script Actions

Pre-Script Action **Incomplete Script Action**

Post-Script Action

Exit Message

Exit Message

Script page

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

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

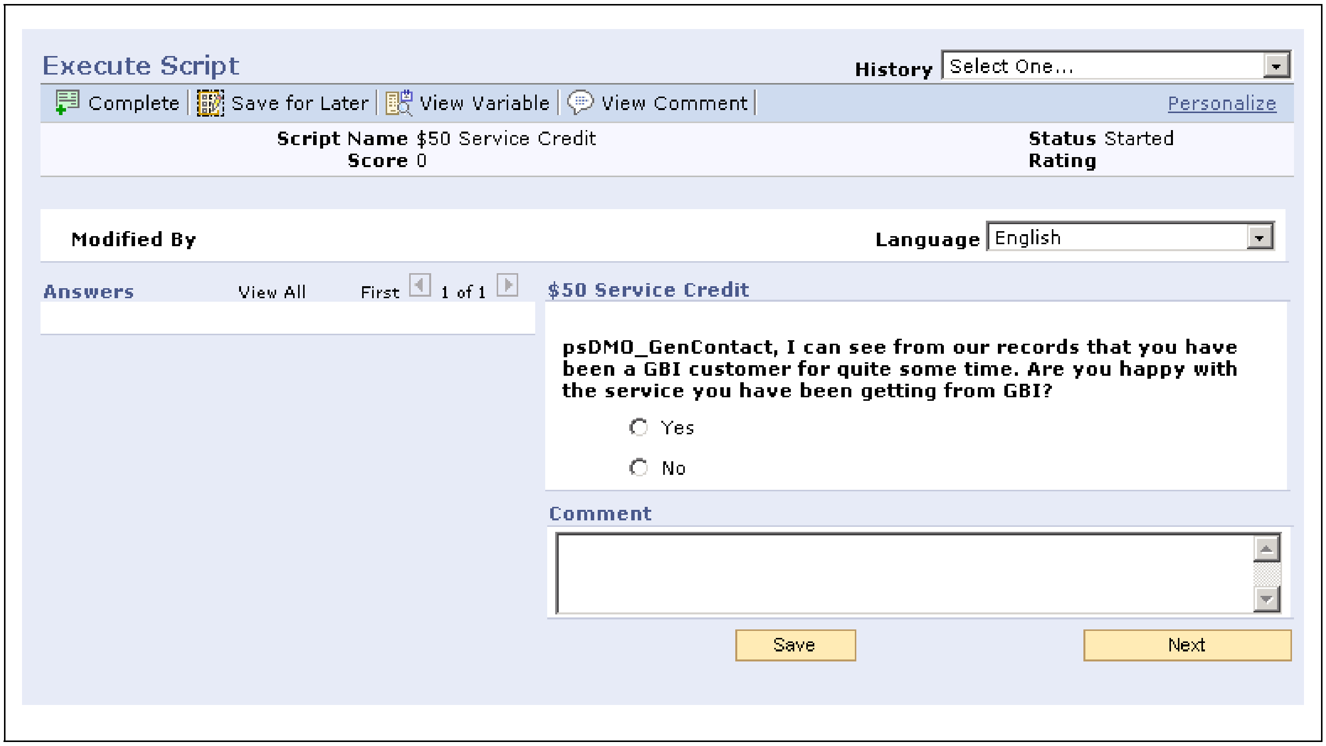
See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Defining Scripts”

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Running Scripts”

Viewing Churn Actions and History

Access the Execute Script page.



History: Select One...

Script Name $50 Service Credit
Score 0
Status Started
Rating

Modified By
Language English

$50 Service Credit

psDMO_GenContact, I can see from our records that you have been a GBI customer for quite some time. Are you happy with the service you have been getting from GBI?

○ Yes

○ No

Execute Script page

Scripts

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

💬	Click to execute the script.

Script History

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

Action	Indicate the name of the action that was taken.

Churn Score	Indicate consumer's churn score at the time the action was taken.
Customer Value	Indicate consumer's value at the time the action was taken.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Running Scripts"

Integration to Import the Churn Score

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

CHAPTER 10

Working with Fraud Management

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

- Set up fraud management.
- Manage fraud cases.

Understanding Fraud Management

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

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

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

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

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

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

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

Understanding the Fraud Management Process Flow

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

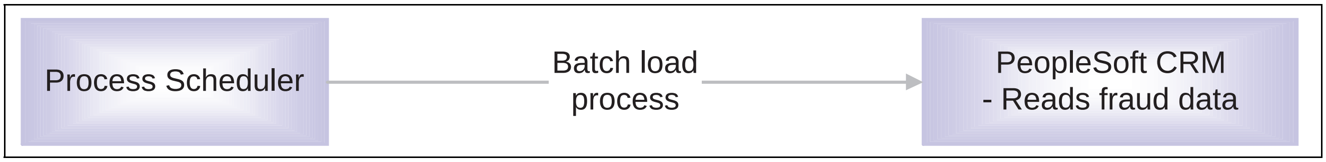
- Updating fraud data.

- Managing fraud.

Update Fraud Data

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

This diagram shows the fraud management business process flow:

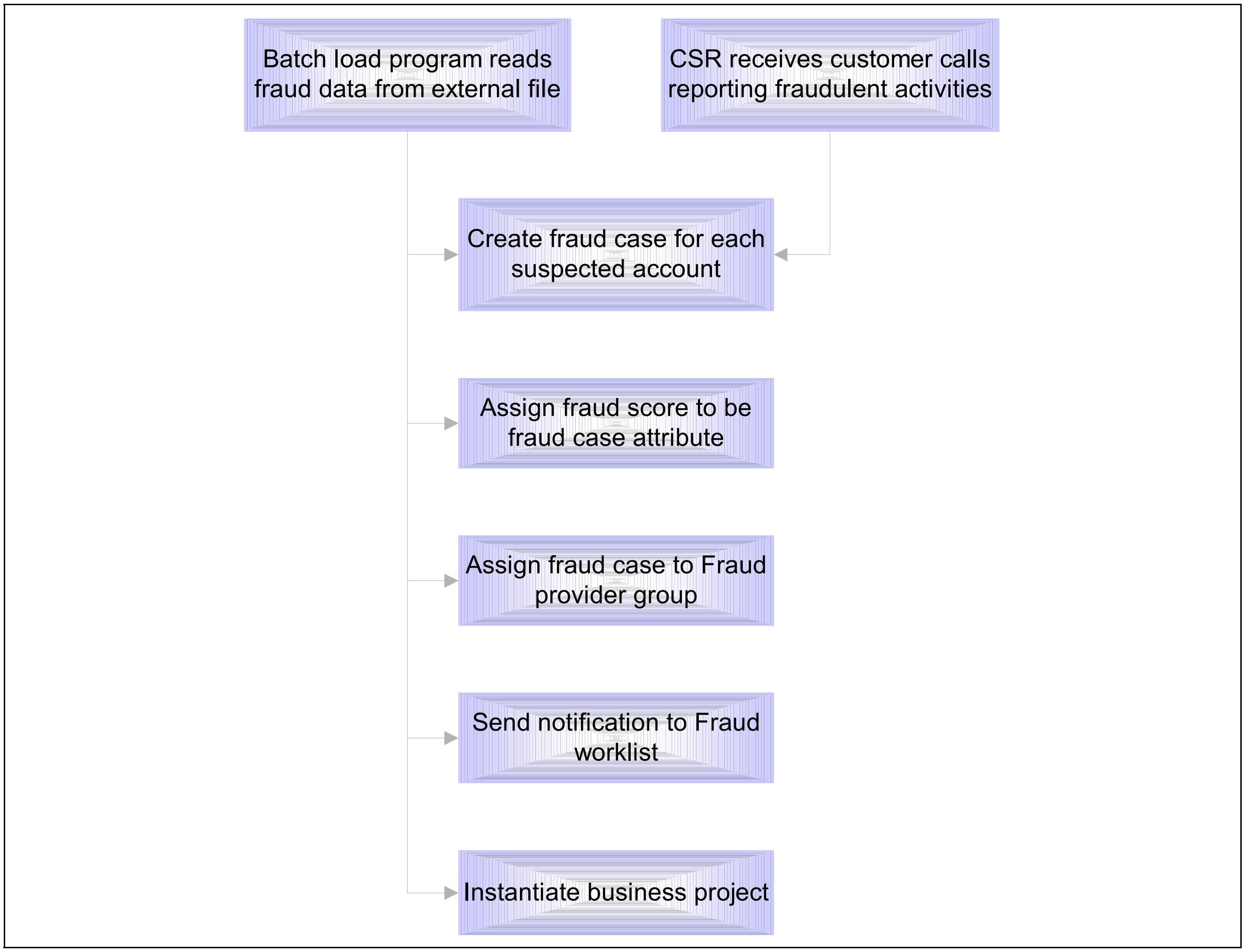

Process Scheduler
Batch load process
PeopleSoft CRM - Reads fraud data

Fraud management business process flow

Manage Fraud

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

This diagram shows the fraud management business process flow:


Batch load program reads fraud data from external file
CSR receives customer calls reporting fraudulent activities
Create fraud case for each suspected account
Assign fraud score to be fraud case attribute
Assign fraud case to Fraud provider group
Send notification to Fraud worklist
Instantiate business project

Fraud management business process flow

Setting up Fraud Management

This section discusses how to:

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

Creating a Business Unit for Fraud

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

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

Creating a Provider Group for Fraud

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

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up and Maintaining Provider Groups and Group Members".

Managing Fraud

This section discusses how to:

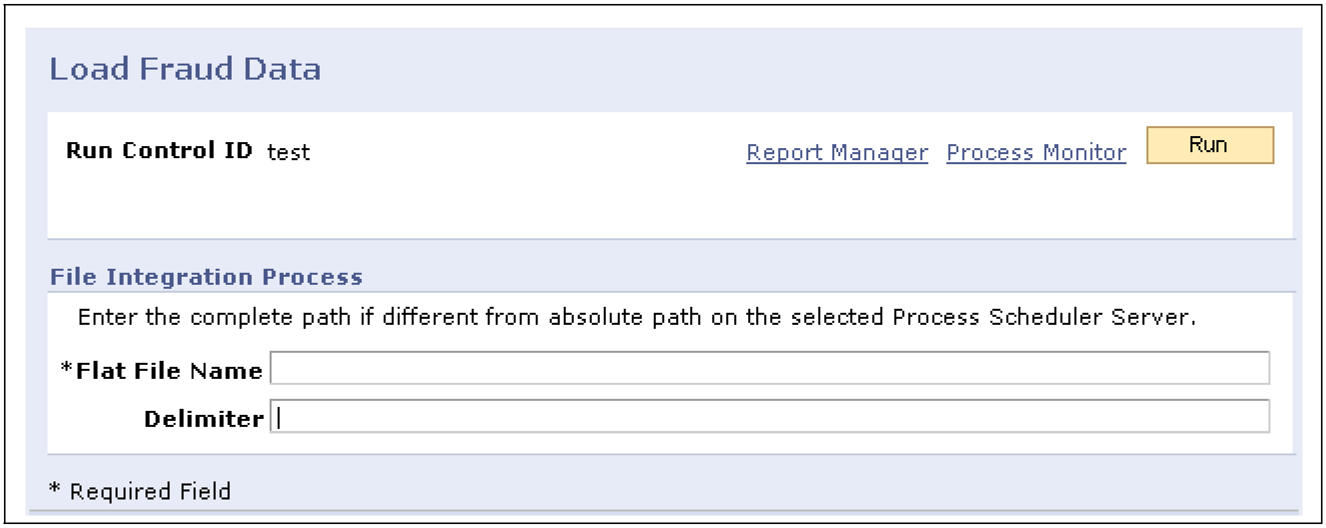
- Load fraud data from an external application.
- Create a fraud case.
- View attributes associated with a fraud case.
- View the fraud business project template.

Pages Used to Manage Fraud

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

Loading Fraud Data from an External Source

Access the Load Fraud Data page.



Load Fraud Data

Run Control ID test

File Integration Process

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

*Flat File Name

Delimiter

* Required Field

Load Fraud Data page

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

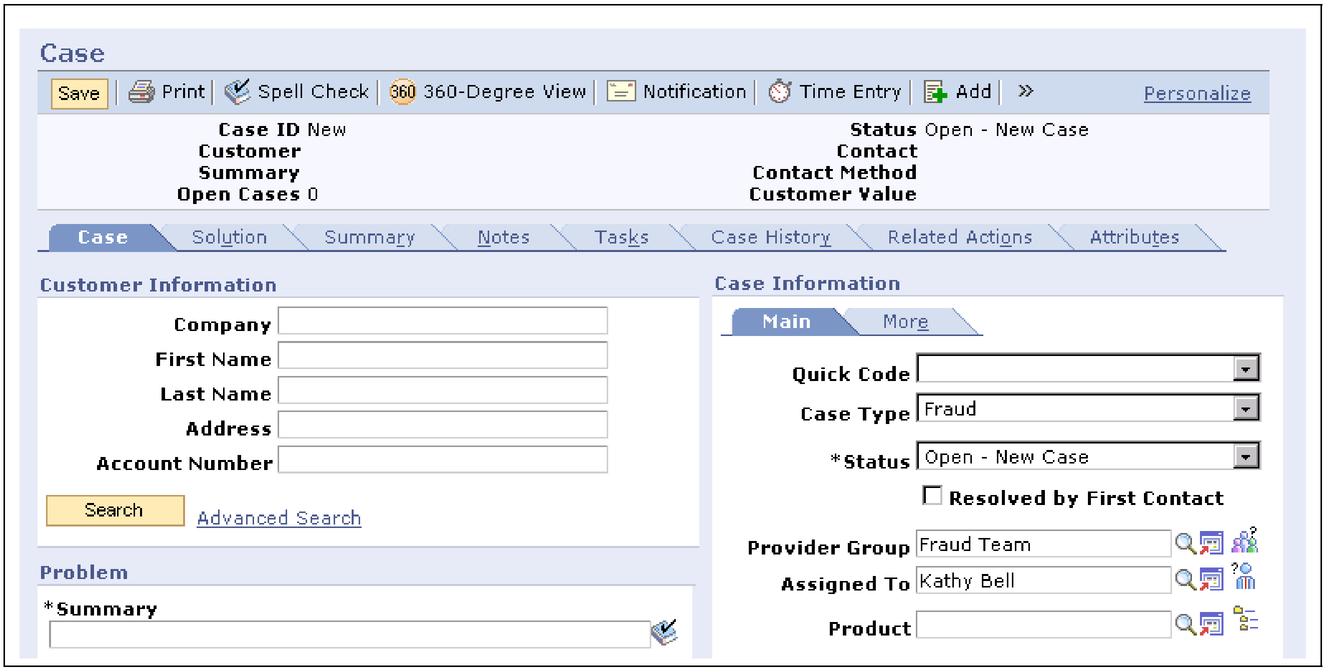
Run Control ID	Displays the Run Control ID that you entered to access the page.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (this message shows you a description of the report and the distribution list).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler Request page, where you initiate the process.

Note. You may schedule the fraud data loading process to take place periodically using the Recurrence drop-down list box in the Process Scheduler Request page.

Flat File Name	Enter the complete path to the CSV file where fraud data is stored.
Delimiter	Enter the delimiter used in the flat file. An example is “|” (a pipe).

Creating a Fraud Case

Access the Case page.


Case
Save
Print
Spell Check
360-Degree View
Notification
Time Entry
Add
Personalize
Customer
Summary
Contact
Contact Method
Customer Value
Case
Solution
Summary
Notes
Tasks
Case History
Related Actions
Attributes
Customer Information
Company
First Name
Last Name
Address
Account Number
Search
Advanced Search
Problem
*Summary
Case Information
Main
More
Quick Code
Resolved by First Contact
Product

Case ID New

Status Open - New Case

Open Cases 0

Case Type Fraud

***Status** Open - New Case

☐ **Resolved by First Contact**

Provider Group Fraud Team

Assigned To Kathy Bell

Case page

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

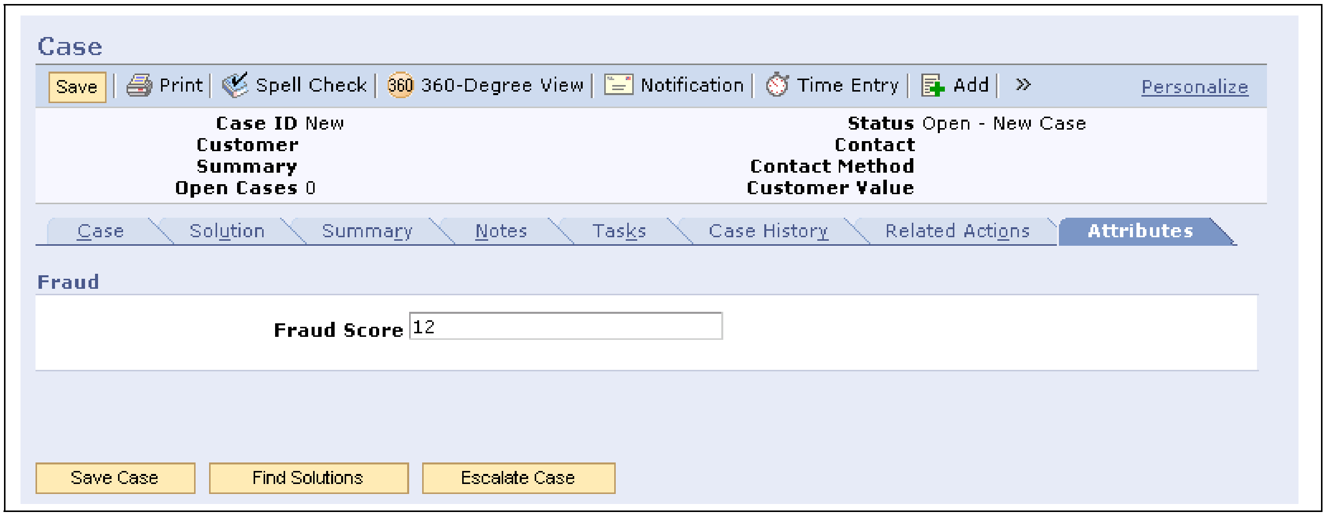
- The fraud business unit is selected for the case.
- *Fraud* is selected as Case Type.
- *Fraud Team* (that is, the name of the provider group created for fraud) is used as the Provider Group.

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “Managing Cases”

Viewing Attributes Associated with a Fraud Case

Access the Case - Attributes page.


Case
Save
Print
Spell Check
360-Degree View
Notification
Time Entry
Add
Personalize
Case
Solution
Summary
Notes
Tasks
Case History
Related Actions
Attributes
Save Case
Find Solutions
Escalate Case

Case ID New
Customer
Summary
Open Cases 0
Status Open - New Case
Contact
Contact Method
Customer Value

Fraud

Fraud Score 12

Case - Attributes page

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

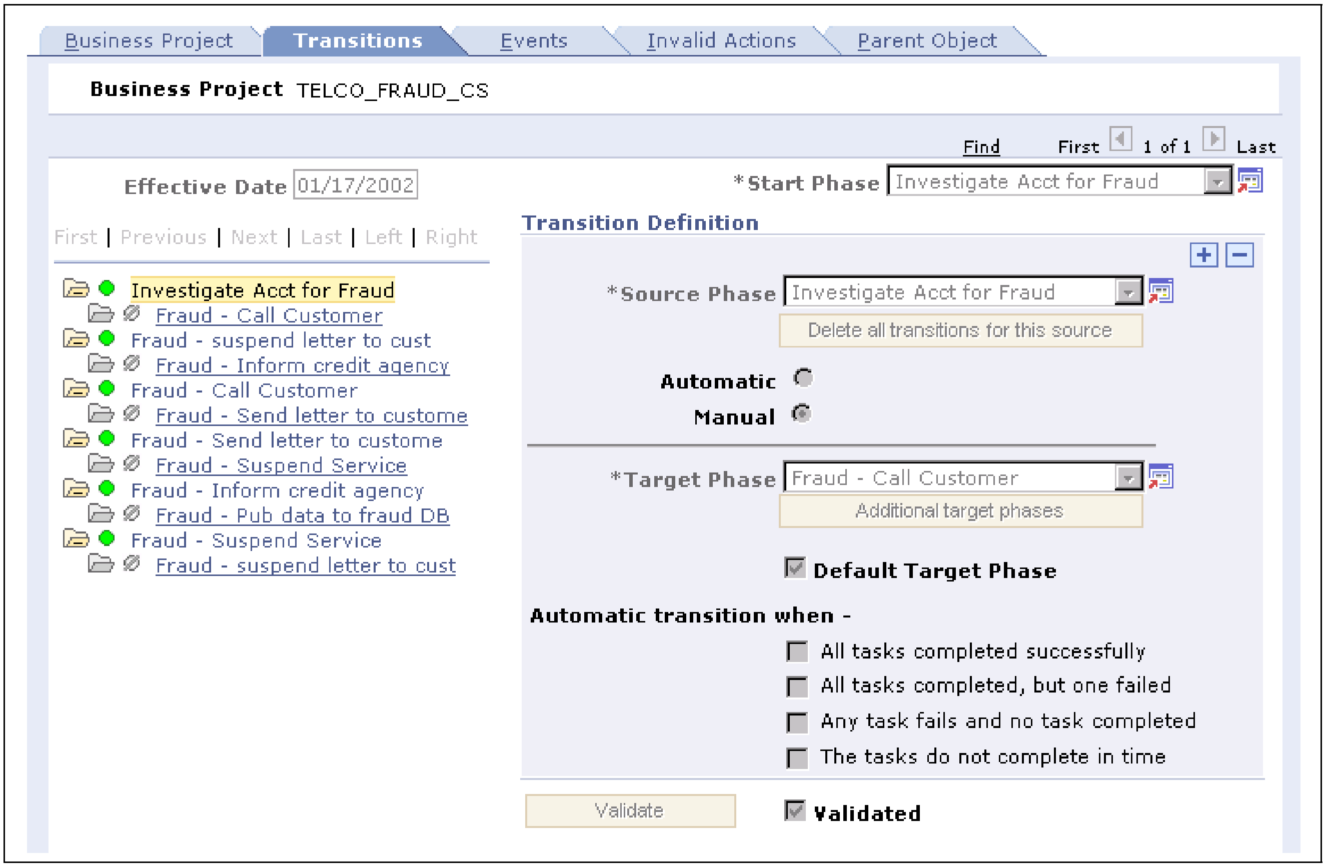
Fraud Score	Display the fraud score value, which is associated to the *Fraud* case type as an attribute.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Configuring Attributes"

Viewing the Fraud Business Project Template

Access the Business Project - Transitions page.


Business Project
Transitions
Events
Invalid Actions
Parent Object
Find
First
1 of 1
Last
First | Previous | Next | Last | Left | Right
Transition Definition
Delete all transitions for this source
Additional target phases
Validate

Business Project TELCO_FRAUD_CS

Effective Date 01/17/2002

***Start Phase** Investigate Acct for Fraud

- Investigate Acct for Fraud
  - Fraud - Call Customer
- Fraud - suspend letter to cust
  - Fraud - Inform credit agency
- Fraud - Call Customer
  - Fraud - Send letter to custome
- Fraud - Send letter to custome
  - Fraud - Suspend Service
- Fraud - Inform credit agency
  - Fraud - Pub data to fraud DB
- Fraud - Suspend Service
  - Fraud - suspend letter to cust

***Source Phase** Investigate Acct for Fraud

Automatic ○

Manual ●

***Target Phase** Fraud - Call Customer

☑ **Default Target Phase**

Automatic transition when -

☐ All tasks completed successfully

☐ All tasks completed, but one failed

☐ Any task fails and no task completed

☐ The tasks do not complete in time

☑ **Validated**

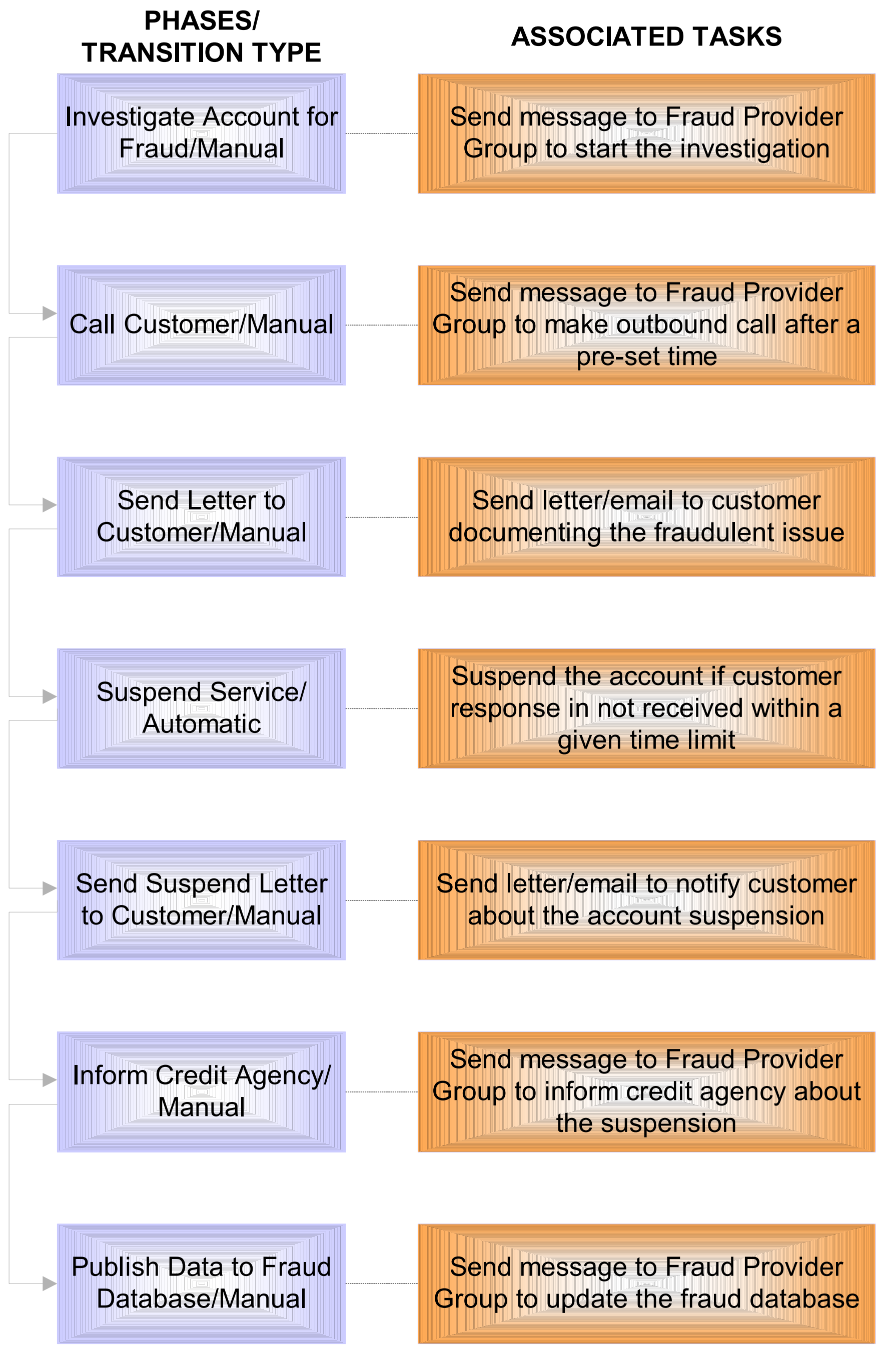
Business Project - Transitions page

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

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

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

The diagram illustrates the fraud business project phases and associated tasks:


PHASES/ TRANSITION TYPE
ASSOCIATED TASKS
Investigate Account for Fraud/Manual
Send message to Fraud Provider Group to start the investigation
Call Customer/Manual
Send message to Fraud Provider Group to make outbound call after a pre-set time
Send Letter to Customer/Manual
Send letter/email to customer documenting the fraudulent issue
Suspend Service/ Automatic
Suspend the account if customer response in not received within a given time limit
Send Suspend Letter to Customer/Manual
Send letter/email to notify customer about the account suspension
Inform Credit Agency/ Manual
Send message to Fraud Provider Group to inform credit agency about the suspension
Publish Data to Fraud Database/Manual
Send message to Fraud Provider Group to update the fraud database

Fraud business project phases and tasks

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Setting Up Business Projects”

CHAPTER 11

Understanding Business Projects for Communications

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

- New Order business project.
- Change Service business project.
- Suspend Service business project.
- Disconnect Service business project.
- Resume Service business project.
- Fraud business project.
- Note: In 9, BPEL processes are provided for the above functionality. The new functionality is added to the BPEL process and not available in the existing Business Projects. In 9, the 'Change Feature' and 'Change Attribute' actions are merged into a 'Change' action and it uses BPEL process.

Understanding Business Projects

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

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

Communications business processes are supported by business project workflow templates:

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

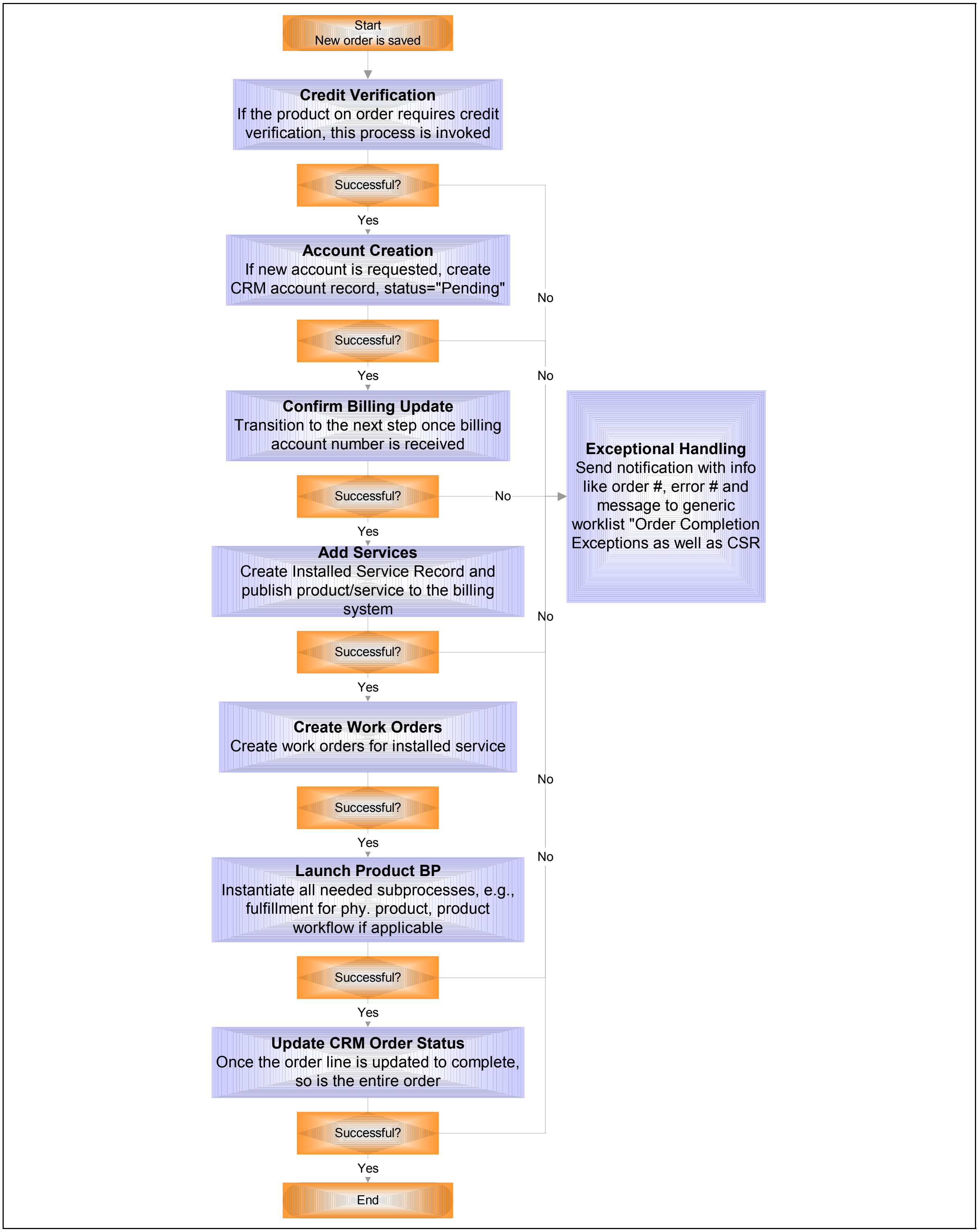
See Also

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

New Order Business Project

The delivered template for the new order business project is TELCO_NEW_ORDER.

The diagram shows the new order business project:


Start
New order is saved
Credit Verification
If the product on order requires credit verification, this process is invoked
Successful?
Yes
Account Creation
If new account is requested, create CRM account record, status="Pending"
No
Successful?
Yes
No
Confirm Billing Update
Transition to the next step once billing account number is received
Exceptional Handling
Send notification with info like order #, error # and message to generic worklist "Order Completion Exceptions as well as CSR
Successful?
No
Yes
Add Services
Create Installed Service Record and publish product/service to the billing system
No
Successful?
Yes
Create Work Orders
Create work orders for installed service
No
Successful?
Yes
No
Launch Product BP
Instantiate all needed subprocesses, e.g., fulfillment for phy. product, product workflow if applicable
Successful?
Yes
Update CRM Order Status
Once the order line is updated to complete, so is the entire order
Successful?
Yes
End

New order business project

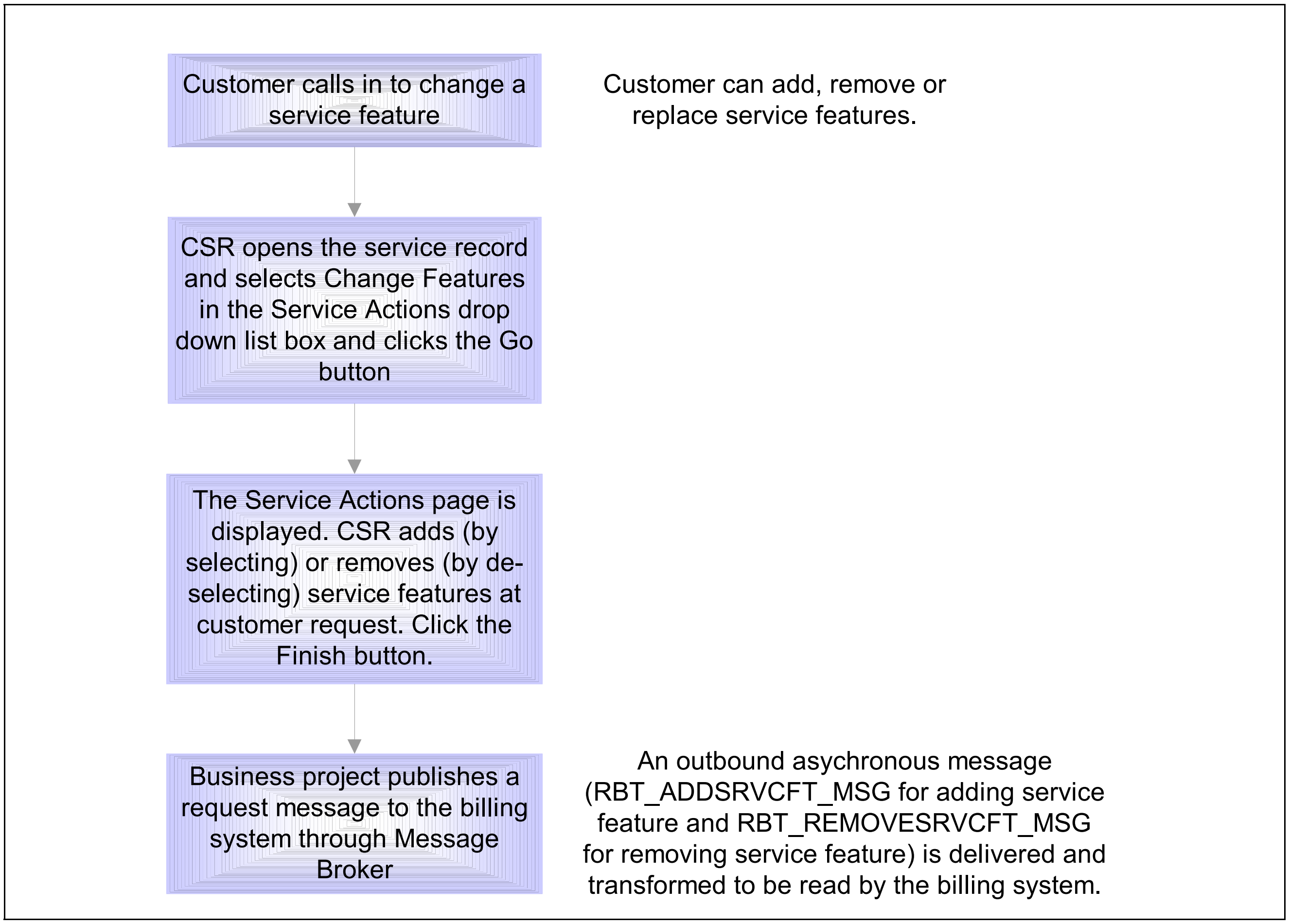
See Also

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, "Setting Up PeopleSoft Order Capture"

Change Service Business Project

The delivered template for the change service business project is TELCO_CHGSVC.

The diagram shows the change service business project:



Customer calls in to change a service feature

Customer can add, remove or replace service features.

CSR opens the service record and selects Change Features in the Service Actions drop down list box and clicks the Go button

The Service Actions page is displayed. CSR adds (by selecting) or removes (by de-selecting) service features at customer request. Click the Finish button.

Business project publishes a request message to the billing system through Message Broker

An outbound asychronous message (RBT_ADDSRVCFT_MSG for adding service feature and RBT_REMOVESRVCFT_MSG for removing service feature) is delivered and transformed to be read by the billing system.

Change service business project

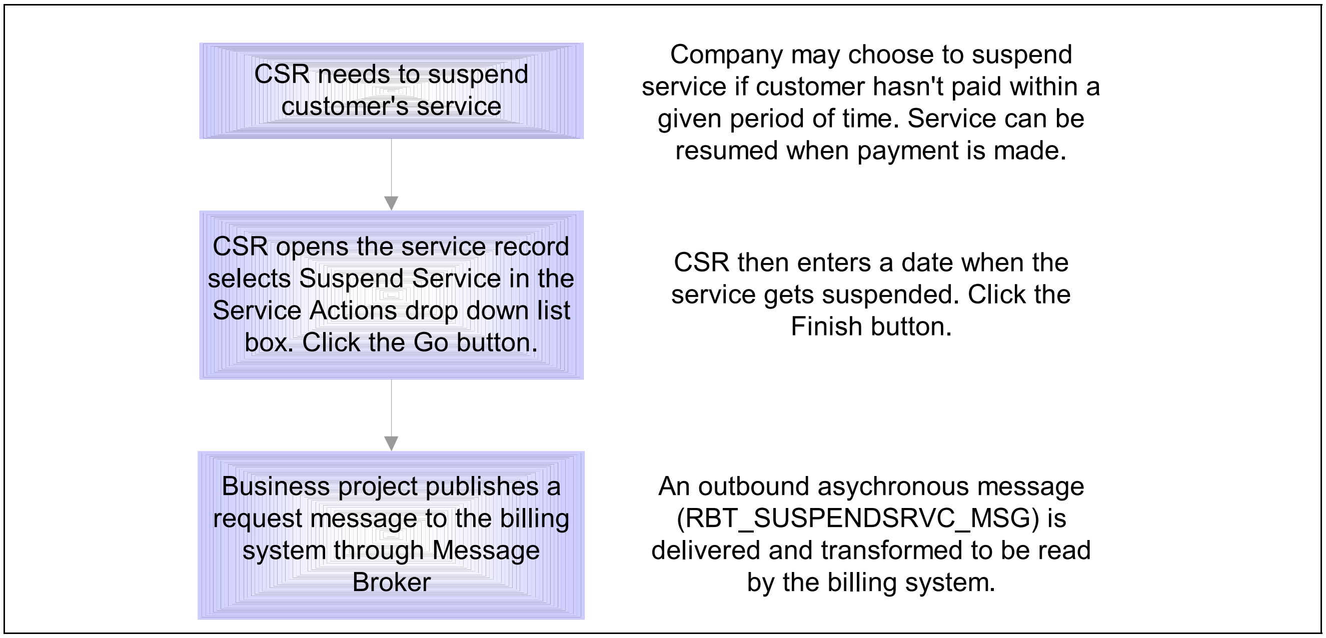
See Also

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, "Working with PeopleSoft Service Management"

Suspend Service Business Project

The delivered template for the suspend service business project is TELCO_SUSPEND.

The diagram shows the suspend service business project:

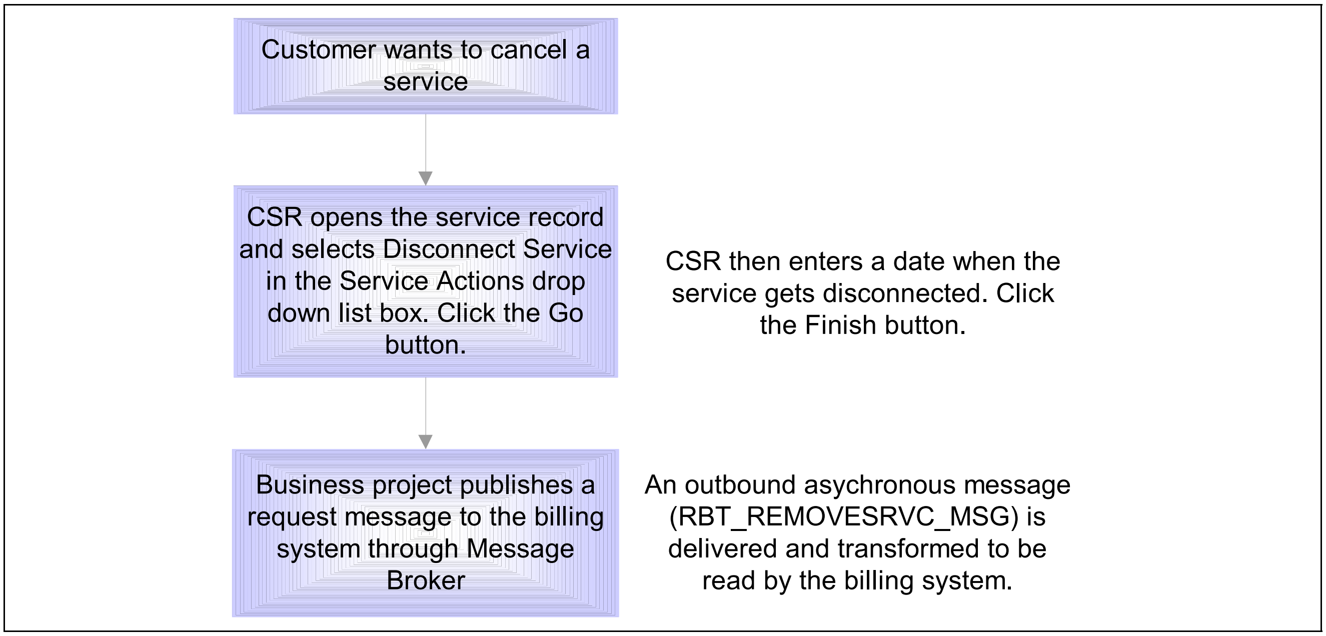

CSR needs to suspend customer's service
Company may choose to suspend service if customer hasn't paid within a given period of time. Service can be resumed when payment is made.
CSR opens the service record selects Suspend Service in the Service Actions drop down list box. Click the Go button.
CSR then enters a date when the service gets suspended. Click the Finish button.
Business project publishes a request message to the billing system through Message Broker
An outbound asychronous message (RBT_SUSPENDSRVC_MSG) is delivered and transformed to be read by the billing system.

Suspend service business project

Disconnect Service Business Project

The delivered template for the disconnect service business project is TELCO_DISCONN.

The diagram shows the disconnect service business project:

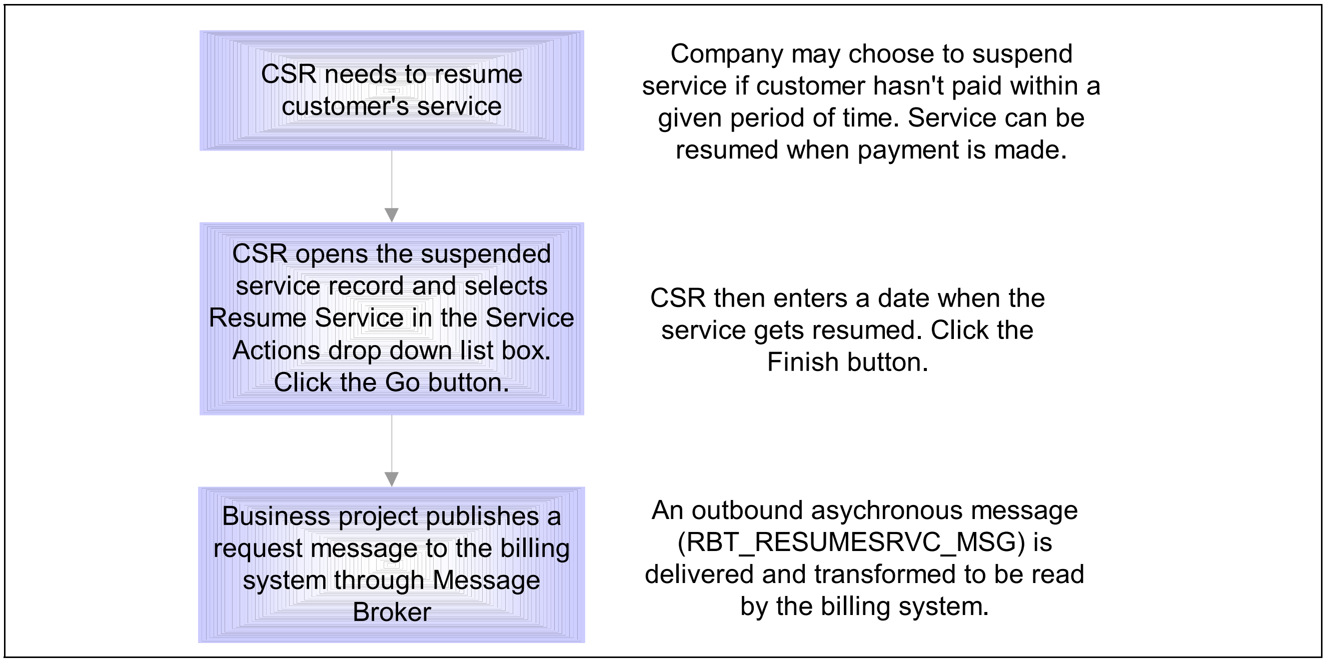

Customer wants to cancel a service
CSR opens the service record and selects Disconnect Service in the Service Actions drop down list box. Click the Go button.
CSR then enters a date when the service gets disconnected. Click the Finish button.
Business project publishes a request message to the billing system through Message Broker
An outbound asychronous message (RBT_REMOVESRVC_MSG) is delivered and transformed to be read by the billing system.

Disconnect service business project

Resume Service Business Project

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

The diagram shows the resume service business project:


CSR needs to resume customer's service
Company may choose to suspend service if customer hasn't paid within a given period of time. Service can be resumed when payment is made.
CSR opens the suspended service record and selects Resume Service in the Service Actions drop down list box. Click the Go button.
CSR then enters a date when the service gets resumed. Click the Finish button.
Business project publishes a request message to the billing system through Message Broker
An outbound asychronous message (RBT_RESUMESRVC_MSG) is delivered and transformed to be read by the billing system.

Resume service business project

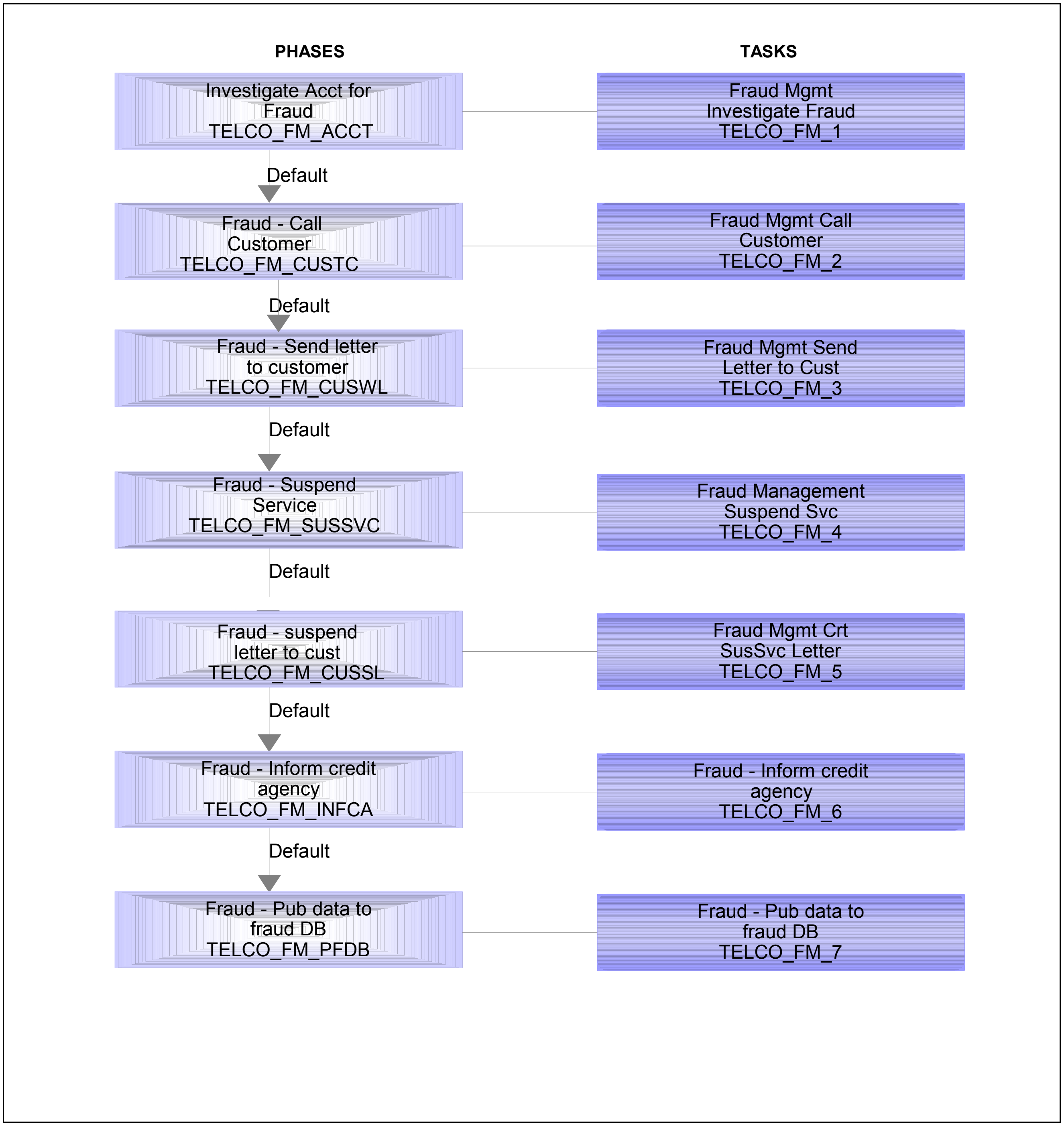
See Also

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, “Working with PeopleSoft Service Management”

Fraud Business Project

The delivered template for the fraud business project is TELCO_FRAUD.

The diagram shows the fraud business project:


PHASES
TASKS
Investigate Acct for Fraud TELCO_FM_ACCT
Fraud Mgmt Investigate Fraud TELCO_FM_1
Default
Fraud - Call Customer TELCO_FM_CUSTC
Fraud Mgmt Call Customer TELCO_FM_2
Default
Fraud - Send letter to customer TELCO_FM_CUSWL
Fraud Mgmt Send Letter to Cust TELCO_FM_3
Default
Fraud - Suspend Service TELCO_FM_SUSSVC
Fraud Management Suspend Svc TELCO_FM_4
Default
Fraud - suspend letter to cust TELCO_FM_CUSSL
Fraud Mgmt Crt SusSvc Letter TELCO_FM_5
Default
Fraud - Inform credit agency TELCO_FM_INFCA
Fraud - Inform credit agency TELCO_FM_6
Default
Fraud - Pub data to fraud DB TELCO_FM_PFDB
Fraud - Pub data to fraud DB TELCO_FM_7

Fraud business project

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

See Also

Chapter 10, "Working with Fraud Management," Setting up Fraud Management, page 91

CHAPTER 12

Understanding Business Projects for Energy

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

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

Understanding Business Projects

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

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

Energy business processes are supported by business project workflow templates:

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

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Setting Up Business Projects”

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Using Business Projects”

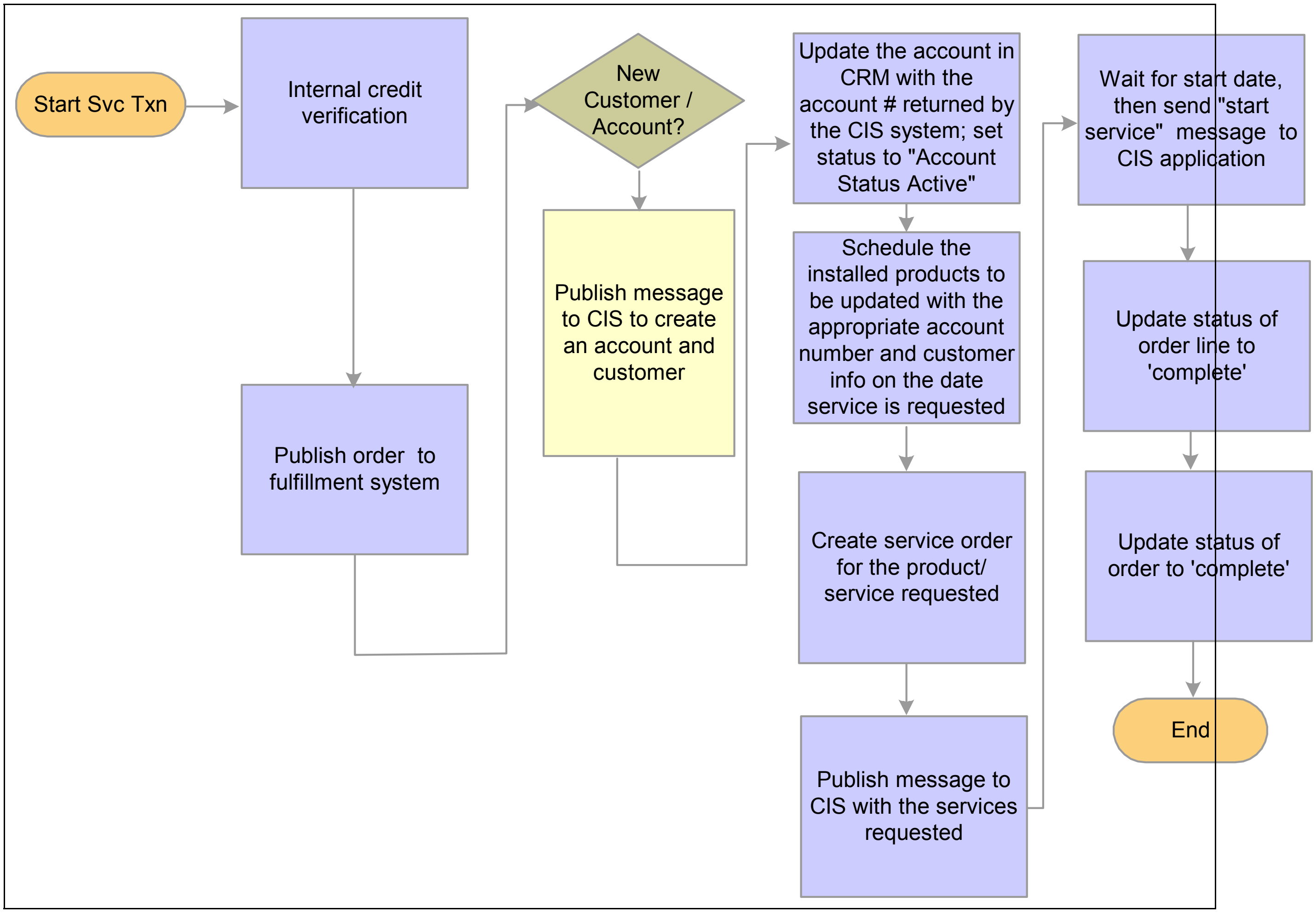
PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, “Working with PeopleSoft Service Management,” Working with Service Management

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

Start Service Business Project

The delivered template for the Start Service Business Project is ENRGY_START_SVC.

The following diagram shows the process flow of the Start Service transaction.


Start Svc Txn
Internal credit verification
Publish order to fulfillment system
New Customer / Account?
Publish message to CIS to create an account and customer
Update the account in CRM with the account # returned by the CIS system; set status to "Account Status Active"
Schedule the installed products to be updated with the appropriate account number and customer info on the date service is requested
Create service order for the product/ service requested
Publish message to CIS with the services requested
Wait for start date, then send "start service" message to CIS application
Update status of order line to 'complete'
Update status of order to 'complete'
End

Start Service business project

Related Tasks for the Start Service Business Project

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

- Phase 1 – Internal Credit Verification

  Task – Internal Credit Verification for the customer.
- Phase 2 – Publish order to fulfillment system.

  Task – Publish discreet products (if any) to the fulfillment system.
- Phase 3 – Create accounts in CRM and Billing.
  - Task 1 – Create relationship between site and new customer (sold to customer) and expire the relationship of the existing customer and site based on the Start Service Date.
  - Task 2 – Create account in CRM, if required.
  - Task 3 – Create customer and account in CIS, if required.
- Phase 4 – Check if CRM account updated with CIS account number.

  Task – Verify if CRM account record updated by CIS account information.
- Phase 5 – Update installed product with customer account number.

  Task – Update installed product with account number of new customer.

- Phase 6 – Create work order.

  Task – Create work order in Field Service.
- Phase 7 – Publish activate service message to CIS system.

  Task – Publish activate service message to CIS system.
- Phase 8 – Update Order Line and Order Status.
  - Task 1 – Update Order Line.
  - Task 2 – Update Order Status.

See Also

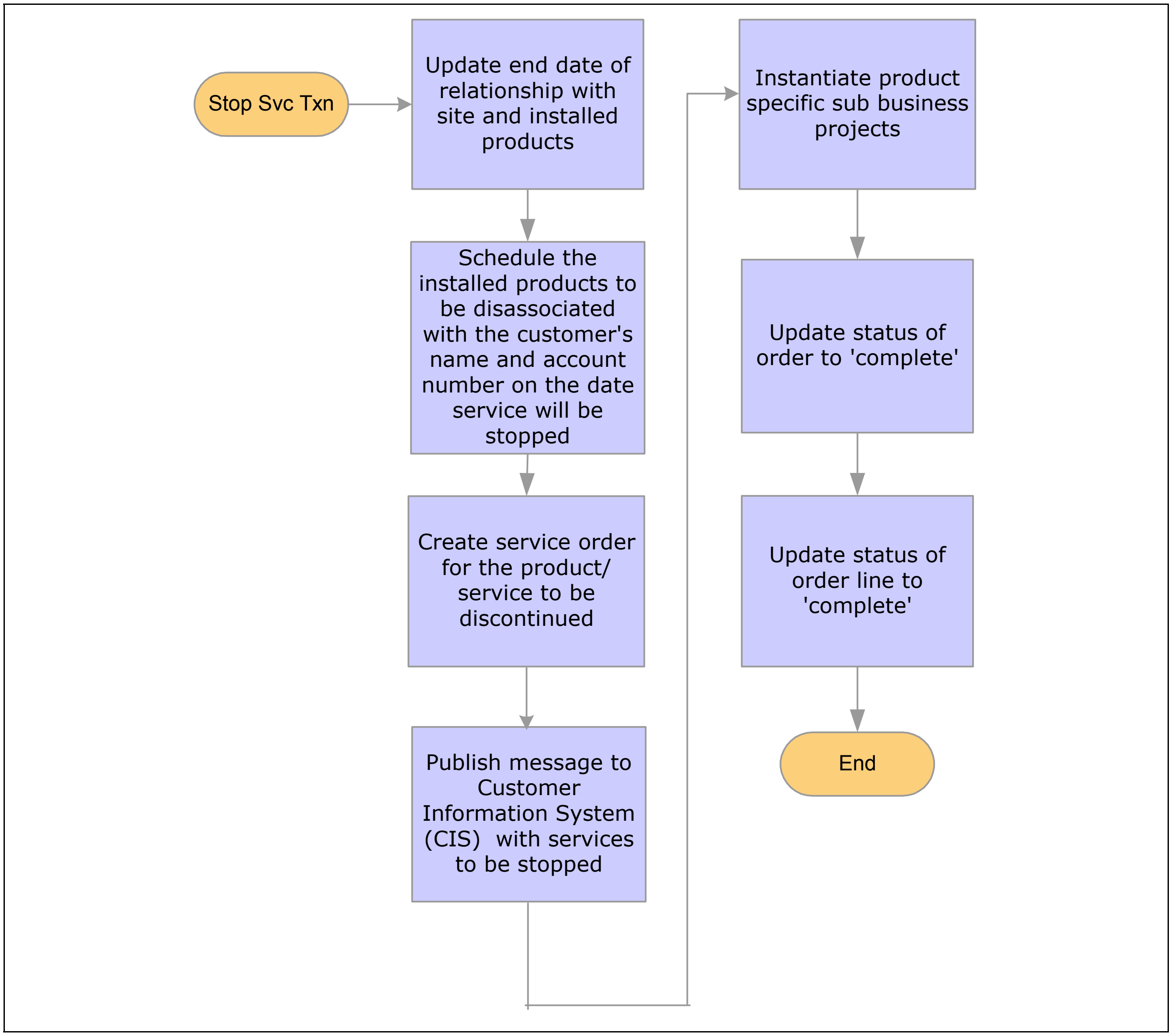
PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Using Business Projects”

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, “Working with PeopleSoft Service Management,” Working with Service Management

Stop Service Business Project

The delivered template for the Stop Service Business Project is ENRGY_STOP_SVC.

The following diagram shows the process flow of the Stop Service transaction.


Stop Svc Txn
Update end date of relationship with site and installed products
Schedule the installed products to be disassociated with the customer's name and account number on the date service will be stopped
Create service order for the product/ service to be discontinued
Publish message to Customer Information System (CIS) with services to be stopped
Instantiate product specific sub business projects
Update status of order to 'complete'
Update status of order line to 'complete'
End

Stop Service business project process

Related Tasks for the Stop Service Business Project

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

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

  Task – Create work order in Field Service.
- Phase 3 – Instantiate product - specific sub business projects (if any).

  Task – Instantiate product - specific business projects.
- Phase 4 – Publish deactivate service message to CIS system.

Task – Publish deactivate service message to CIS system

- Phase 5 – Update Order Line and Order Status.
  - Task 1 – Update Order Line.
  - Task 2 – Update Order Status.

See Also

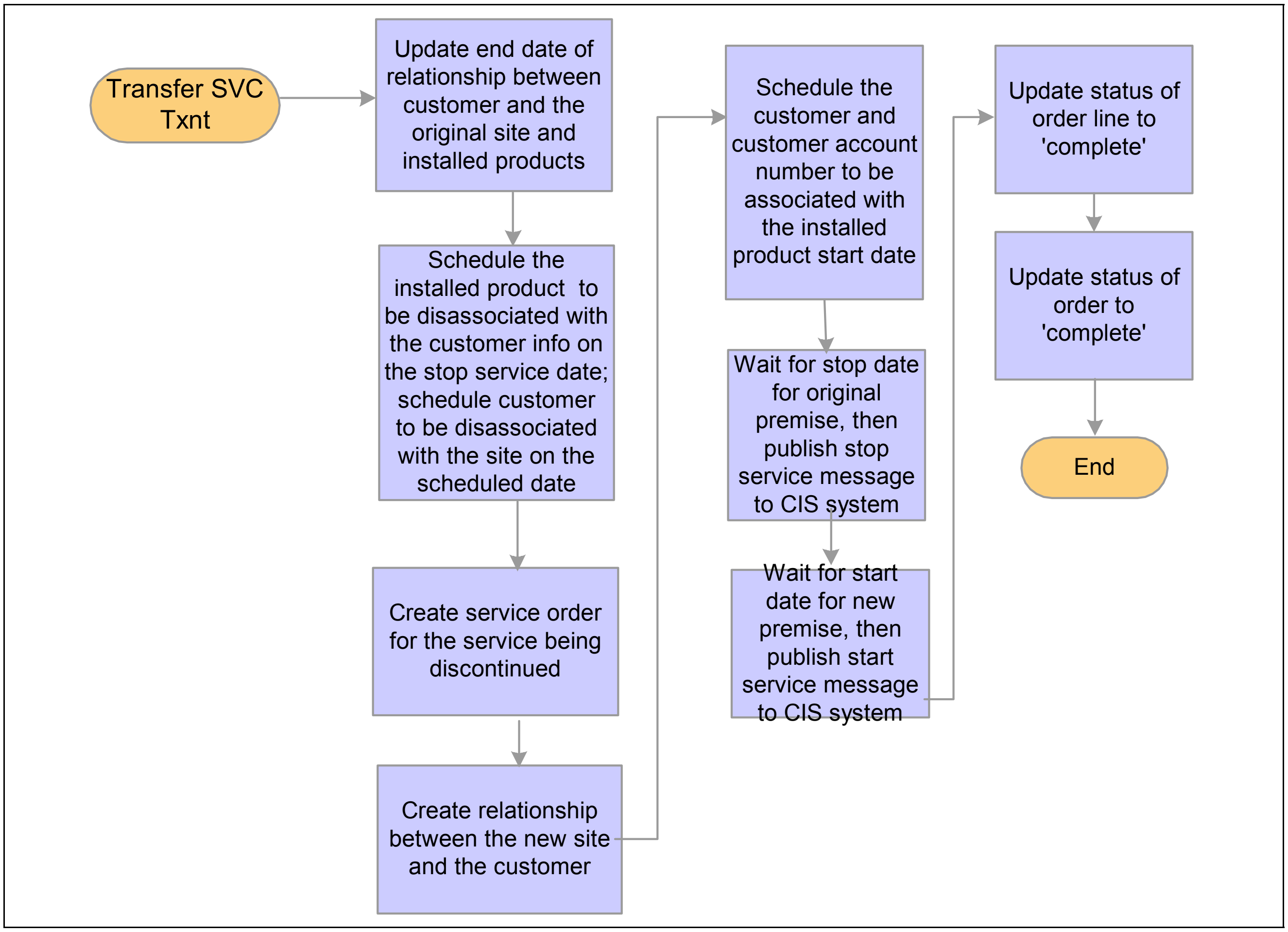
PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Using Business Projects”

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, “Working with PeopleSoft Service Management,” Working with Service Management

Transfer Service Business Project

The delivered template for the Transfer Service Business Project is ENRGY_TRSFR_SVC.

The following diagram shows the process flow of the Transfer Service transaction.


Transfer SVC Txnt
Update end date of relationship between customer and the original site and installed products
Schedule the installed product to be disassociated with the customer info on the stop service date; schedule customer to be disassociated with the site on the scheduled date
Create service order for the service being discontinued
Create relationship between the new site and the customer
Schedule the customer and customer account number to be associated with the installed product start date
Wait for stop date for original premise, then publish stop service message to CIS system
Wait for start date for new premise, then publish start service message to CIS system
Update status of order line to 'complete'
Update status of order to 'complete'
End

Transfer Service business project

Related Tasks for the Transfer Service Business Project

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

- Phase 1 – Internal Credit Verification

  Task – Internal Credit Verification for the customer.
- Phase 2 – Publish order to fulfillment system.

  Task – Publish discreet products (if any) to fulfillment system.
- Phase 3 – Expire existing relationships.
  - Task 1 – Expire relationships between existing Site and Customer (Sold To – Customer), and expire the relationship of the existing customer and site based on Start Service Date.
  - Task 2 – Disassociate customer account from the existing installed product.
- Phase 4 – Create work order.

  Task – Create work order for the requested product/service.
- Phase 5 – Establish new relationships.
  - Task 1– Create relationship between new site and customer (Sold To – Customer) and expire the relationship of the existing customer and site based on Start Service Date.
  - Task 2 – Associate customer account from the existing installed product.
- Phase 6 – Create work order.

  Task – Create work order for the requested product/service.
- Phase 7 – Instantiate product - specific sub business project.

  Task – Instantiate product - specific sub business project.
- Phase 8 – Publish service message to CIS system.
  - Task 1– Publish de - activate service message to CIS system.
  - Task 2 – Publish activate service message to CIS system.
- Phase 9 – Update Order Line and Order Status.
  - Task 1 – Update Order Line.
  - Task 2 – Update Order Status.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Using Business Projects”

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, “Working with PeopleSoft Service Management,” Working with Service Management

CHAPTER 13

Understanding Products and Services for Communications and Energy

This chapter discusses:

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

Product Model for Communications

This section discusses:

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

Product Model

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

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

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

- Physical Product

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

- Service

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

- Service feature

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

See Also

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook, "Understanding Products and Items in PeopleSoft CRM"

Product Packages

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

See Also

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook, "Setting Up Products," Defining Product Package Components

Product Catalog

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

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

See Also

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook, "Creating Catalogs"

Product Actions

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

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

Actions include:

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

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

For example:

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

Parent Product	Action Type	Action
Wireless Service	Service Management	Disconnect
Wireless Service	Service Management	Suspend
Wireless Service	Service Management	Resume
Wireless Service	Service Management	Change

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

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

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

Parent Product	Action Type	Action
Any Time Minutes	Service Management	Add
Weekend Minutes	Service Management	Add
Weekend Minutes	Service Management	Remove

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

See Also

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook, “Setting Up Products,” Defining Products

Product Attributes

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

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

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

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

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

- Informational

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

- Configurable

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

See Also

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook, “Setting Up Products,” Defining Products

Service Management for Communications

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

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

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

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

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

Service Change	Definition	Example
Change Service	An order that changes the features associated with a pre-existing service. This order can be used to add, replace, or remove service features. . This Service can be used to change phone numbers and attributes.	Existing wireless customer wants to replace a 500 minute plan with 1000 minute plan. He also wants to cancel the call forwarding feature which he never uses. See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, "Order Capture Delivered Business Processes and Web Services," Change Service Process Flow.
Disconnect Service	An order that cancels a pre-existing service. All features related to the service are also canceled. Service features cannot be disconnected by themselves.	Customer wants to switch service providers. He calls to cancel existing service. See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, "Order Capture Delivered Business Processes and Web Services," Service Management Disconnect Service Process Flow.

Service Change	Definition	Example
Suspend Service	An order that changes the status of a pre-existing service to *Suspended*. Service features cannot be suspended.	Customer is going away for a long vacation and wants to suspend the service. See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Order Capture Delivered Business Processes and Web Services,” Service Management Suspend Service Process Flow.
Resume Service	An order that returns the status of an existing service to *Active*. Resuming service is accomplished by entering an End Date in the Suspend Service line detail.	Customer returns from vacation and wants the service resumed. See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Order Capture Delivered Business Processes and Web Services,” Service Management Resume Service Process Flow.

See Also

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, “Working with PeopleSoft Service Management”

Installed Service for Communications

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

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

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

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

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

See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Order Capture Delivered Business Processes and Web Services,” Communications New Order Process Flow.

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

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

Service Management for the Energy Industry

This section discusses:

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

Service Management for the Energy Industry

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

The templates are:

- The Start Service template (ENRGY_START_SVC) captures new service requests for energy services.
- The Stop Service template (ENRGY_STOP_SVC) captures stop service requests for energy services.
- The Transfer Service template (ENRGY_TRSFR_SVC) captures transfer of service requests for energy services.

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

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

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

The following references provide information about Order Capture functionality:

See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Getting Started with PeopleSoft Enterprise CRM Order Capture Applications”; *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Defining Order Capture Business Units”; *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Managing Orders and Quotes” and *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Setting Up PeopleSoft Order Capture”.

See Also

PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook, “PeopleSoft Enterprise Bill Presentment and Account Management Preface”

PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook, “Setting Up Billing Integration for the Communication and Energy Industries”

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

The Start Service Transaction

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

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

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

The Stop Service Transaction

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

CSRs use the Stop Service transaction to:

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

The Transfer Service Transaction

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

The Transfer Service transaction enables the CSR to:

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

CHAPTER 14

Working with Products in Financial Services and Insurance

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

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

Understanding Products in the Financial Service and Insurance Industries

In this section, we discuss:

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

Insurance Products

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

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

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

Financial Services Products

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

Term	Details
Product	A product can also be known as a single product or base product. This is the product that a financial institution sells to a business contact. A product could be a regular savings account, a certificate of deposit, automobile insurance, or a credit card.
Product group	A product group is a collection of related financial services products. For example, the Checking product group could consist of regular checking, premium interest checking, student checking, and business checking.
Product package	A package consists of two or more base products that may not be related, but are grouped together for sales or marketing purposes. A Senior Banking package might consist of a premium interest checking account, an ATM card, and a credit card, as well as preferred rate auto and home insurance. A product package can include another product package.
Arrangement	A product arrangement is composed of a single product or product package with enhanced features that is made available to organizations, not individual consumers. An organization can be a company, a partnership, or an alternate capacity. For example, a bank may offer a preferred rate of interest on a savings account to employees of the company.
Contract	A contract is an agreement between the financial institution and a specific organization that includes a specific product. In contrast to an arrangement, a contract is tied to one organization and is specific to that organization.
Product relationship	A product relationship links one product to another in a specific relationship. Product relationships can define alternate products, complementary products, cross-sells, prerequisites, replacements, service features, and upsells.

Product Attachments

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

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

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

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

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

Product Relationships

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

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

See Also

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook, “Setting Up Products,” Managing Product Relationships

Attributes

This section discusses:

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

Attributes for Financial Services

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

- Features

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

- Terms and Conditions

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

- Services

  This attribute displays the services provided with the product.

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

See *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, “Setting Up Products,” Defining Product Attributes.

Attributes for Insurance

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

Limits and deductibles are insurance-specific attributes.

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

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

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

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

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

Product Application Forms

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

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

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

- Branch scripts
- Configurator
- URLs
- Online application forms

The following table describes each type:

Application Type	Details	More Information
Branch scripts	• Can be configured according to channel • Use the core branch script functionality. • Are associated with the product and the channel. The association allows the runtime program that accesses the product to initiate the correct branch script.	See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Defining Scripts” and *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Running Scripts”.
Configurator	• Uses the core Configurator functionality. • You associate a configuration schema with the product and the channel. The association allows the runtime program that accesses the product to initiate the Configurator.	See *PeopleSoft Enterprise Advanced Configurator 9 PeopleBook*, “Getting Started with PeopleSoft Enterprise Advanced Configurator”.

Application Type	Details	More Information
URL	• Can be configured according to channel. • Links to an external web application. • Since the URL is an external link, it is not inside your firewall. Use the URL to integrate with third-party web-data-collecting applications.	
Application Form	• Can be configured according to channel. • Set up an application form using the Application Form component.	See Chapter 4, "Setting Up Industry-Specific Functionality," Setting Up Online Application Forms for FNOL, page 25.

Actions

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

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

See Also

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook, "Setting Up Products," Defining Product Actions

Internal and External Visibility

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

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

With internal and external visibility, you can:

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

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

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

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

Setting Up and Maintaining Product Groups

This section discusses how to:

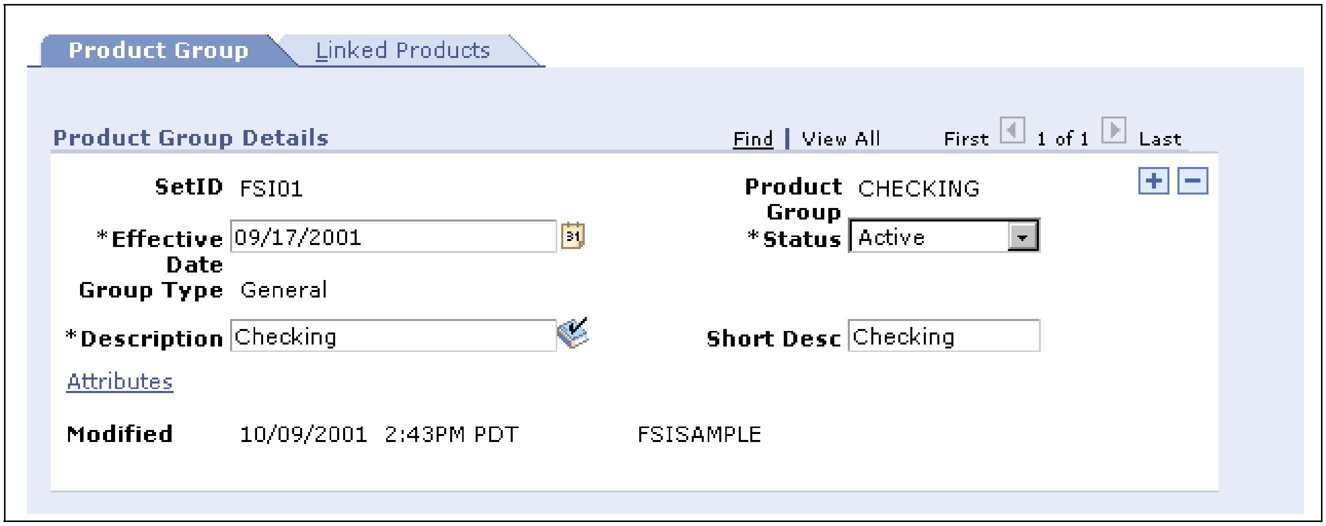
- Define product groups.
- View product group attributes.

Pages Used to Set Up and Maintain Product Groups

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

Defining Product Groups

Access the Product Group page.



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

Attributes

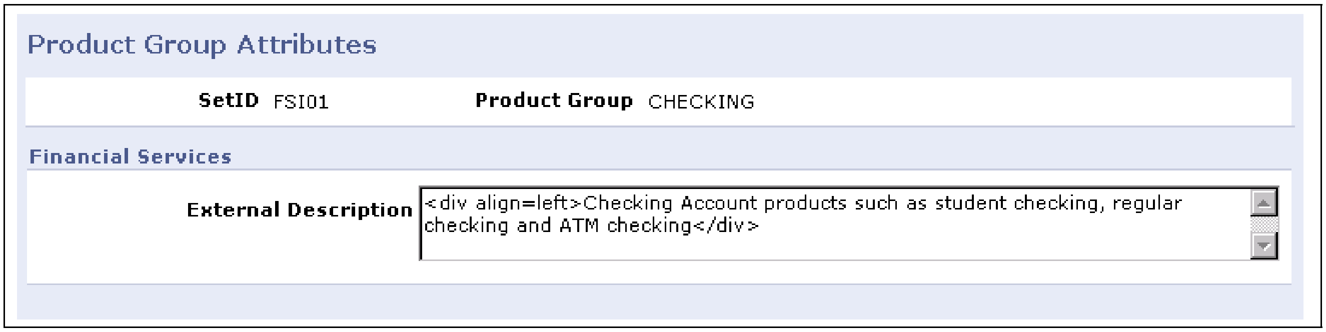
Modified 10/09/2001 2:43PM PDT FSISAMPLE

Product Group page

Status	Enter *Active* or *Inactive.*
Group Type	Select a category for the group type. You can use this as an additional organizational tool.
Attributes	Click to access the Attributes page.

Viewing Product Group Attributes

Access the Product Group - Attributes page.



Product Group Attributes

SetID FSI01 **Product Group** CHECKING

Financial Services

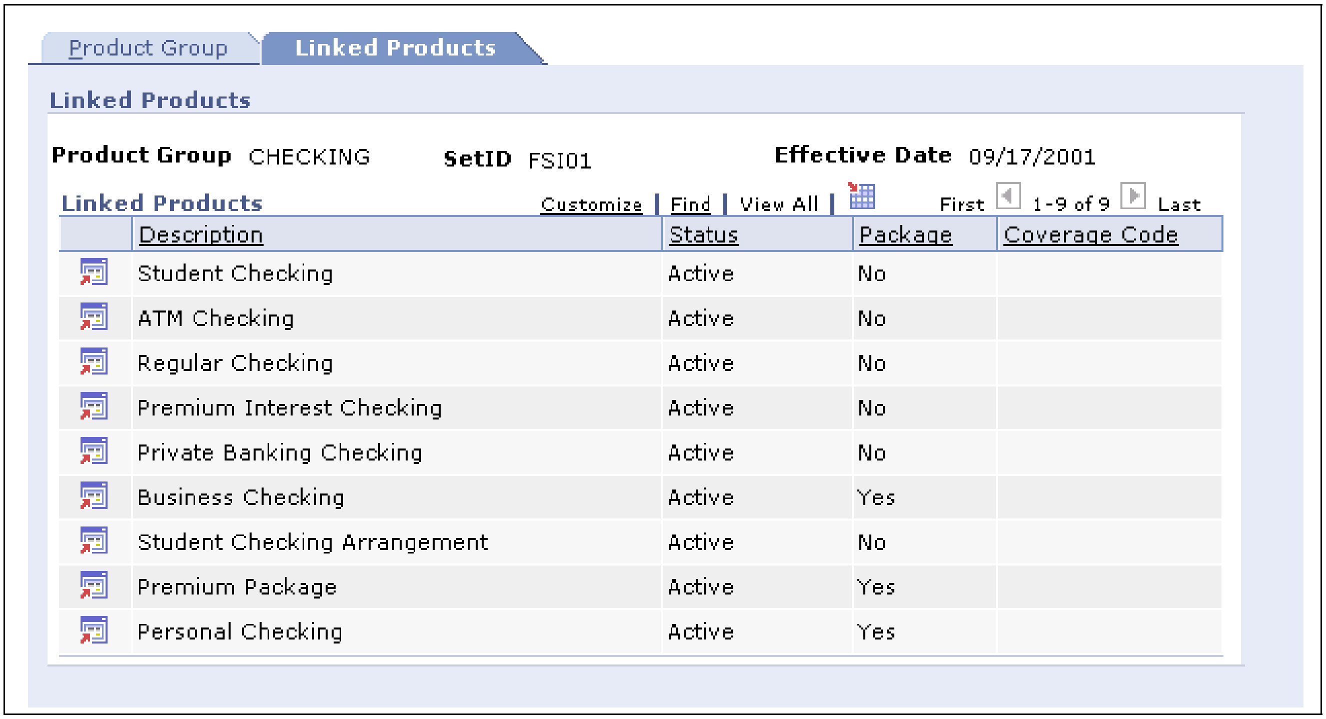
External Description <div align=left>Checking Account products such as student checking, regular checking and ATM checking</div>

Product Group Attributes page

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

Confirming Linked Products

Access the Linked Products page.



Linked Products

Product Group CHECKING **SetID** FSI01 **Effective Date** 09/17/2001

Linked Products

Description	Status	Package	Coverage Code
Student Checking	Active	No	
ATM Checking	Active	No	
Regular Checking	Active	No	
Premium Interest Checking	Active	No	
Private Banking Checking	Active	No	
Business Checking	Active	Yes	
Student Checking Arrangement	Active	No	
Premium Package	Active	Yes	
Personal Checking	Active	Yes	

Linked Products page

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

Defining Products and Product Packages

This section discusses how to:

- Define products and product packages.

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

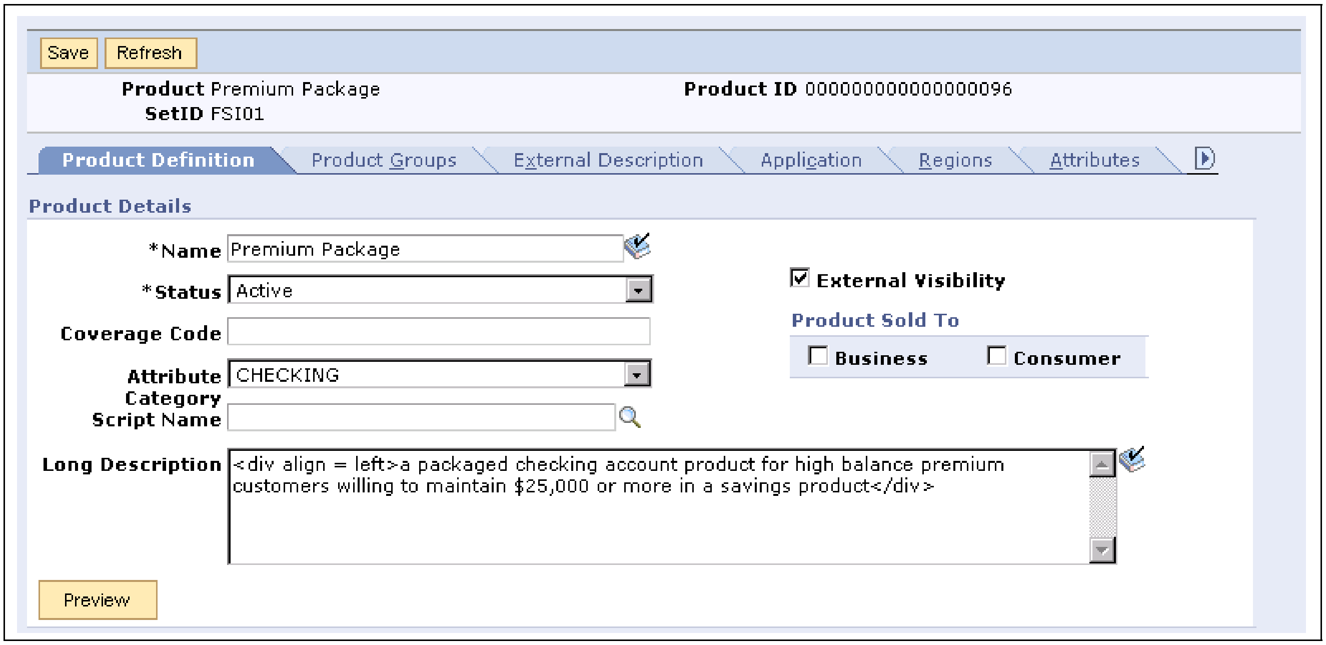
Pages Used to Define Products

Page Name	Object Name	Navigation	Usage
Product Definition	RBFPROD_DEFN	Products CRM, Product Definition, Product Definition	Set up product information.
Product Groups	RBF_PROD_GROUP_LNK	Products CRM, Product Definition, Product Groups	Link a product to a product group. One product can belong to multiple groups.
External Description	PROD_EXT_DESCR	Products CRM, Product Definition, External Description	Enter the external description of the product to appear on the self-service customer page. The page allows the entry of HTML text, as well as an area to preview the HTML-enabled descriptions.
Application	RBF_PROD_APPL	Products CRM, Product Definition, Application	Associate an application with a product.
Regions	PROD_REGION	Products CRM, Product Definition, Regions	Define availability of product by region.
Attributes	RB_ATTR_RUN_PROD	Products CRM, Product Definition, Attributes	View attributes that are attached to this product on the Product Definition page.
Attachments	PROD_ATT	Products CRM, Product Definition, Attachments	Attach files.
Packages	RBF_PRODKIT_LINK	Products CRM, Product Definition, Packages	View packages that contain the product.

Page Name	Object Name	Navigation	Usage
Arrangements	RBF_PROD_ARRA	Products CRM, Product Definition, Arrangements	View the arrangements that are associated with the product or package.
Contracts	RBF_PROD_ACNT	Products CRM, Product Definition, Contracts	View the contracts that are associated with the product or package.
Actions	RBT_PROD_ACTION	Products CRM, Product Definition, Actions	Link actions to the product or package.
Business Process	RBF_PROD_BUSPRJ_PG	Products CRM, Product Definition, Business Process	Initiate business processes to be performed on the product or package.
Images	PROD_IMAGES	Products CRM, Product Definition, Images	Associate images with the product or package. The images that you associate here are used for Internet sales.
Correspondence Options	RBF_BPEL_CORRSP	Products CRM, Product Definition, Correspondence Options	Select correspondence options for the product or product package.

Defining Products and Product Packages

Access the Product Definition page.



Product Premium Package

SetID FSI01

Product ID 000000000000000096

***Name** Premium Package

***Status** Active

Coverage Code

Attribute Category CHECKING

Script Name

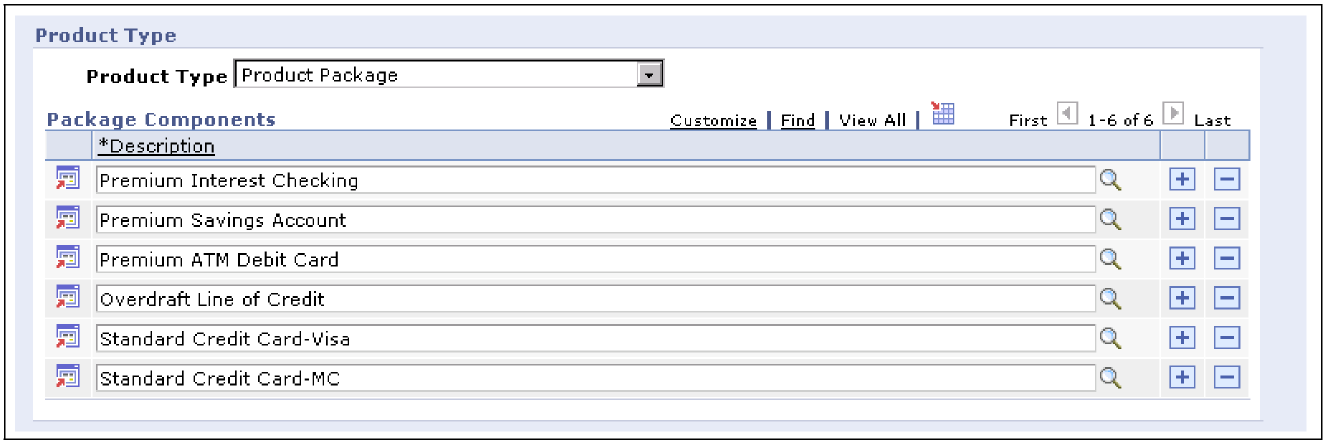
Long Description <div align = left>a packaged checking account product for high balance premium customers willing to maintain $25,000 or more in a savings product</div>

☑ **External Visibility**

Product Sold To

☐ **Business** ☐ **Consumer**

Product Definition page (1 of 2)



Product Type

Product Type: Product Package

Package Components

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

Product Definition page (2 of 2)

Name	Enter up to 30 characters that describe the product or package.
Status	Select *Active* or *Inactive.*
External Visibility	Select to make the product description visible externally. If selected, the External Description and Long External Description fields must be completed.
Coverage Code	Coverage codes are limited to five characters.
Product Sold to Business or Consumer	Select if the product is available for business customers, individual consumers, or both.
Attribute Category	Select the attribute category that applies to this product. Use the Product Definition - Attributes page to view the attributes as they appear on internal or external pages.
Script Name	Select an upsell script to use in connection with this product. The upsell script is optional.
Long Description	The extended product description is entered in HTML. This is the description that the internal agent sees.
Preview	Click to display the product description as it appears on the sales entry page.

Product Type

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

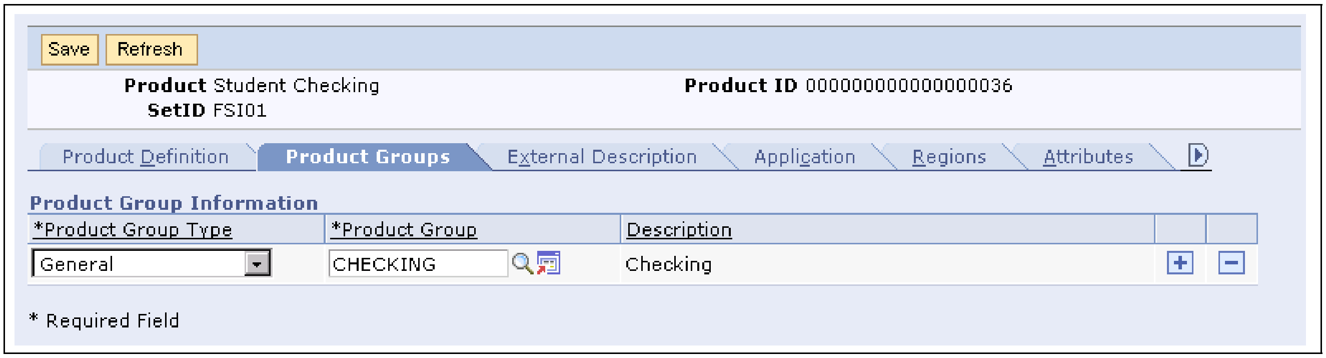
Product Type	Select to designate the product as a *Single Product*, *Product Package*, or *Product Arrangement*. The page changes depending on your selection.
Package Components	This group box is displayed if *Product Package* is selected. A product package has two or more components. Enter the products—coverages,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

See Also

Chapter 15, “Working with Arrangements and Contracts,” page 141

Linking Products and Packages to Product Groups

Access the Product Groups page.


Save
Refresh
Product Definition
Product Groups
External Description
Application
Regions
Attributes
Product Group Information
* Required Field

Product Student Checking **Product ID** 000000000000000036
SetID FSI01

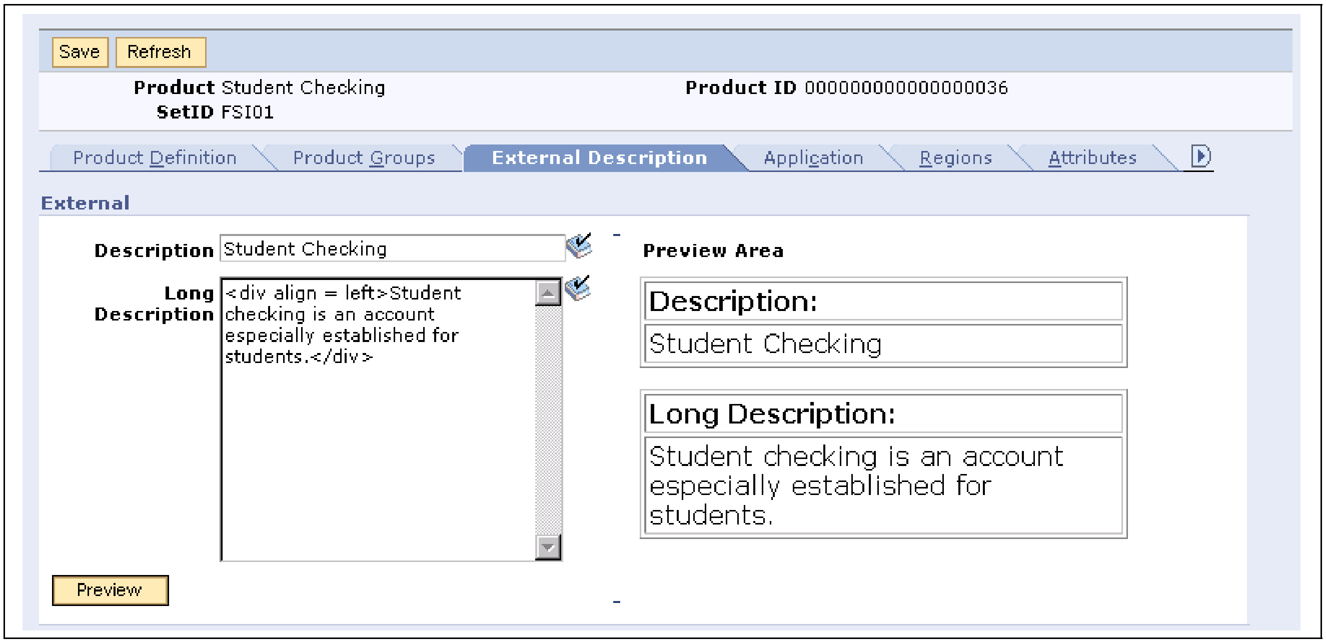
*Product Group Type	*Product Group	Description
General	CHECKING	Checking

Product Definition - Product Groups page

Product Group Type	Select a type based on common product features. The system comes with functional product group types already defined. You can add additional groups.
Product Group	Associate single products with a product group for organizational purposes. One product can belong to many product groups. You can drill down to the Product Group page from the definition.

Defining the External Description

Access the Product Definition - External Description page.


Save
Refresh
Product Definition
Product Groups
External Description
Application
Regions
Attributes
External
Preview Area
Preview

Product Student Checking **Product ID** 000000000000000036
SetID FSI01

Description Student Checking

Long Description <div align = left>Student checking is an account especially established for students.</div>

Description:
Student Checking

Long Description:
Student checking is an account especially established for students.

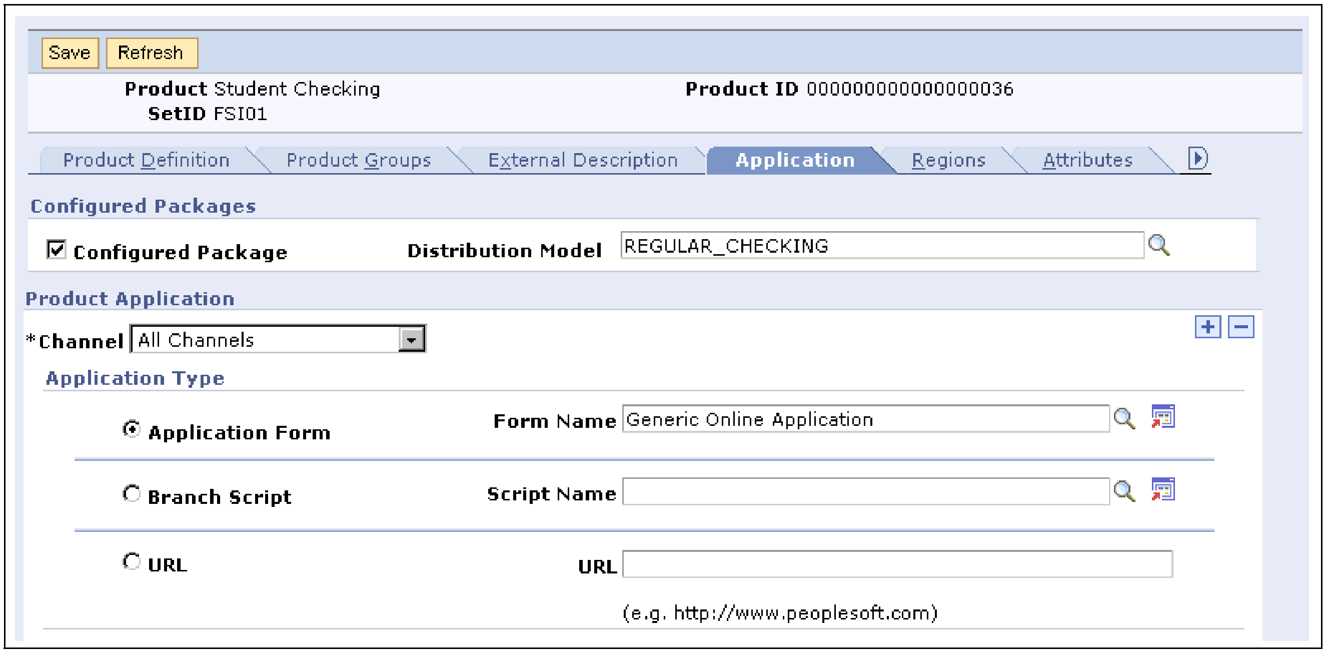
Product Definition - External Description page

Description	Enter a name to appear for self-service customers.

	If the Description and Long Description fields are completed on this page, then the product is considered to be external. Entry in these fields selects the External Visibility check box on the Product Definition page automatically.
Long Description	Enter the extended product description in HTML. This is the description that the self-service customer sees. The *<html>*, *<title>*, *<header>*, and *<body>* tags are not supported. Use this field to enter URL links to websites used during the sell process to deliver detailed information.
Preview	Click to show the product description as it appears on the sales entry page.

Associating Applications with Products and Packages

Access the Product Definition - Application page.



Product Student Checking **Product ID** 000000000000000036
SetID FSI01

Configured Packages

☑ **Configured Package** **Distribution Model** REGULAR_CHECKING

Product Application

***Channel** All Channels

Application Type

● **Application Form** **Form Name** Generic Online Application

○ **Branch Script** **Script Name**

○ **URL** **URL**

(e.g. http://www.peoplesoft.com)

Product Definition - Application page

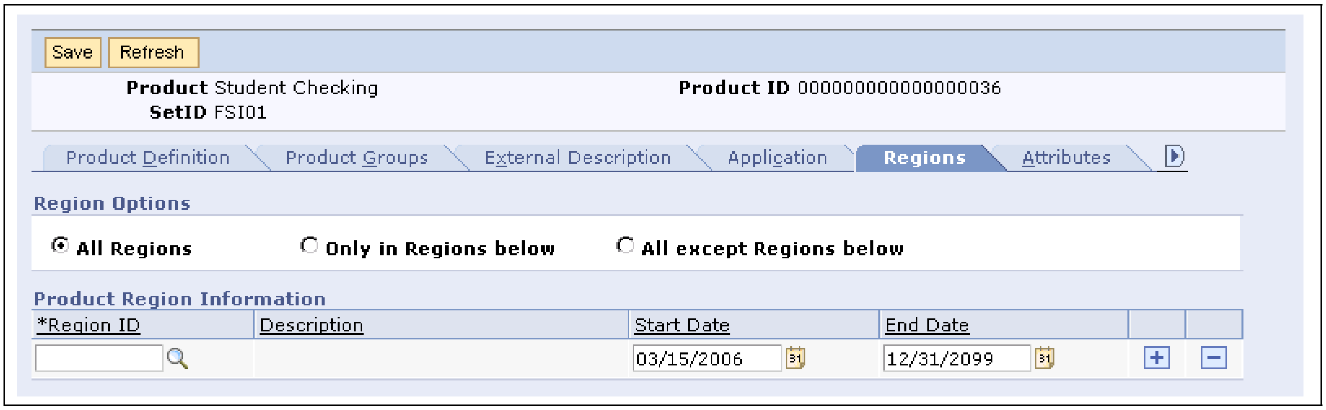
Configured Package	Select to define the product package as a fully configured package. A fully configured package uses the product configurator at runtime and creates a package based on your choices from the Configurator model.
Distribution Model	Select the distribution model related to the product package.
Channel	Indicate where the application will be available. You may define only one application form per channel. Insert a row to add a new channel. Delivered values are *All Channels, Internal,* and *Web Self-Service.*
Application Form	Select if you are using an application form created in the Application Form component.
Form Name	Enter the application form ID. Click the transfer button to access the application form component and view and update the form.

Branch Script	Select to use a branch script. The association allows the runtime program that accesses the product to initiate the correct branch script.
Script Name	Enter the branch script name. Click the transfer button to access the branch script tree and view and update the form.
URL	Select to use an internal link to an application form.
URL	Enter the URL to transfer the customer to the application form.

See Chapter 14, "Working with Products in Financial Services and Insurance," Product Application Forms, page 124.

Defining Regions

Access the Product Definition - Regions page.



Product Student Checking **Product ID** 0000000000000000036

SetID FSI01

Region Options

● **All Regions** ○ **Only in Regions below** ○ **All except Regions below**

Product Region Information

*Region ID	Description	Start Date	End Date
		03/15/2006	12/31/2099

Product Definition - Regions page

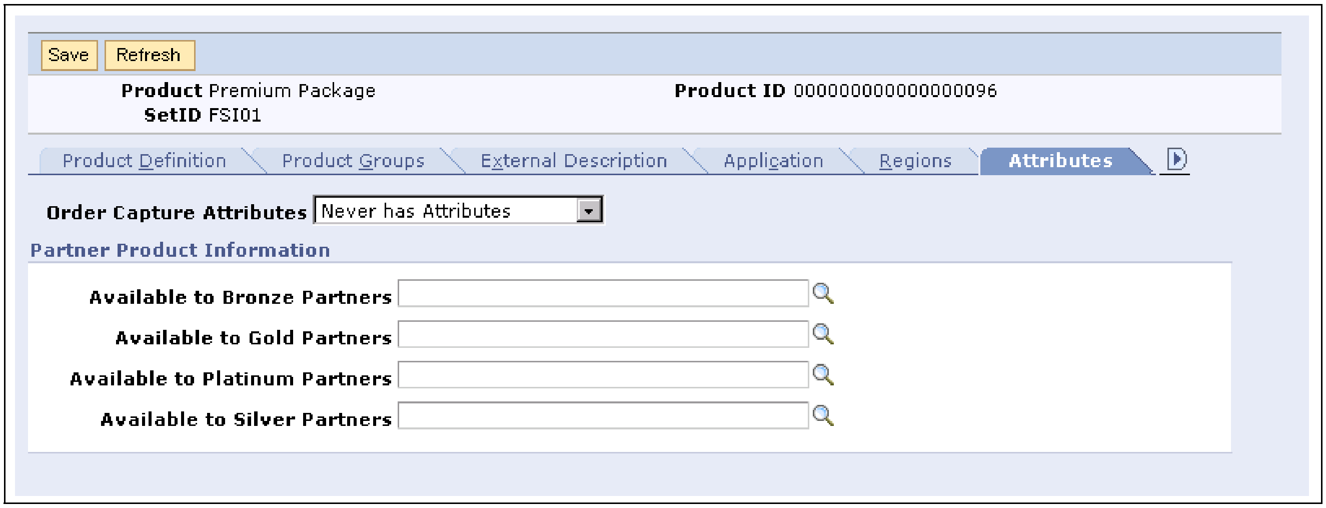
The fields under Region Options enable you to define specific areas where the product is available for sale.

All Regions	Select to make the product generally available.
Only in Regions below	Select to make the product unavailable in all regions except those you specify. Use the Region ID field to identify the regions (by region ID) where the product can be sold. Use this to set up products that are only available in specific states.
All except Regions below	Select to make the product available in all regions except those you specify. Use the Region ID field to identify the regions in which the product is unavailable.

Note. Region IDs are defined on the Region page, and are of the type *Product Sales*.

Viewing Attributes

Access the Product Definition - Attributes page.


Save
Refresh
Product Definition
Product Groups
External Description
Application
Regions
Attributes

Product Premium Package
SetID FSI01
Product ID 000000000000000096

Order Capture Attributes Never has Attributes

Partner Product Information

Available to Bronze Partners
Available to Gold Partners
Available to Platinum Partners
Available to Silver Partners

Product Definition - Attributes page

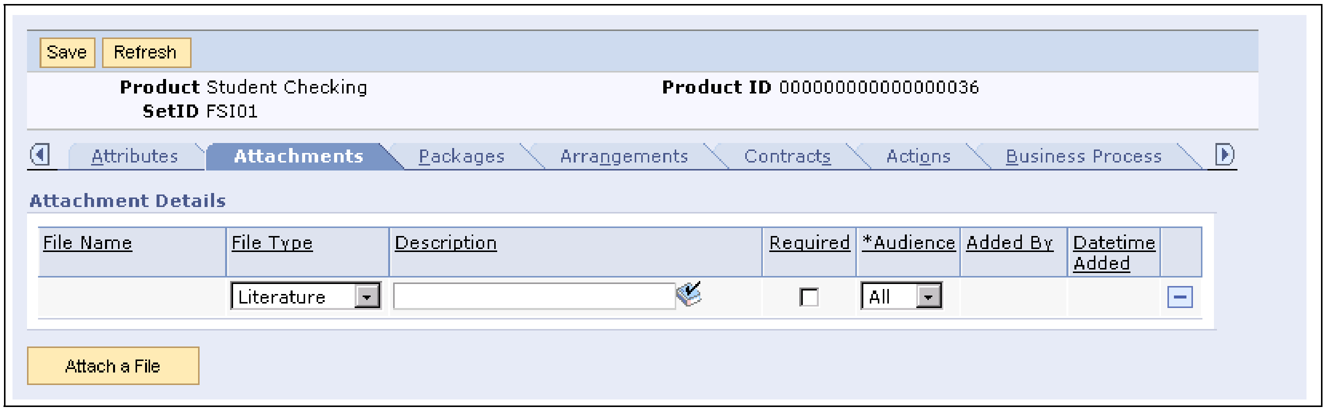
The system displays the attributes associated with the product or package on the Product Definition page. You can select additional values from the drop-down list boxes.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Configuring Attributes"

Defining Attachments

Access the Product Definition - Attachments page.


Save
Refresh
Attributes
Attachments
Packages
Arrangements
Contracts
Actions
Business Process
Attach a File

Product Student Checking
SetID FSI01
Product ID 000000000000000036

Attachment Details

File Name	File Type	Description	Required	*Audience	Added By	Datetime Added
	Literature		☐	All		

Product Definition - Attachments page

File Name	Displays the name and extension of the attached file. Click to activate a pop-up window that displays the contents of the attachment. The contents of this file will be viewed by the self-service user during product selection.
File Type	Select an attachment type. Options are: *Disclosure, Literature, White Paper,* and *Prospectus.*
Description	Enter a brief description of the attachment.
Required	This flag is used at runtime to identify whether the user must view the attachment to order the product, or whether the information is solely informational.

Audience	Select the audience for the attachment. Options include *All, External, Internal,* and *None.*
Attach a File	Click to select the file to attach to the product.

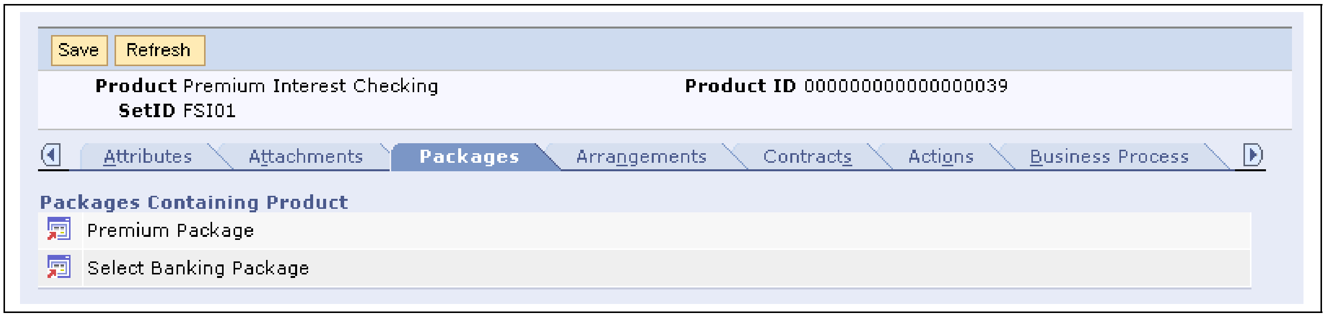
Note. Refer to Adding Attachments for the associated rules.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Working with Notes and Attachments"

Viewing Product Packages

Access the Product Definition - Packages page.


Save
Refresh
Attributes
Attachments
Packages
Arrangements
Contracts
Actions
Business Process

Product Premium Interest Checking **Product ID** 000000000000000039
SetID FSI01

Packages Containing Product

- Premium Package
- Select Banking Package

Product Definition - Packages page

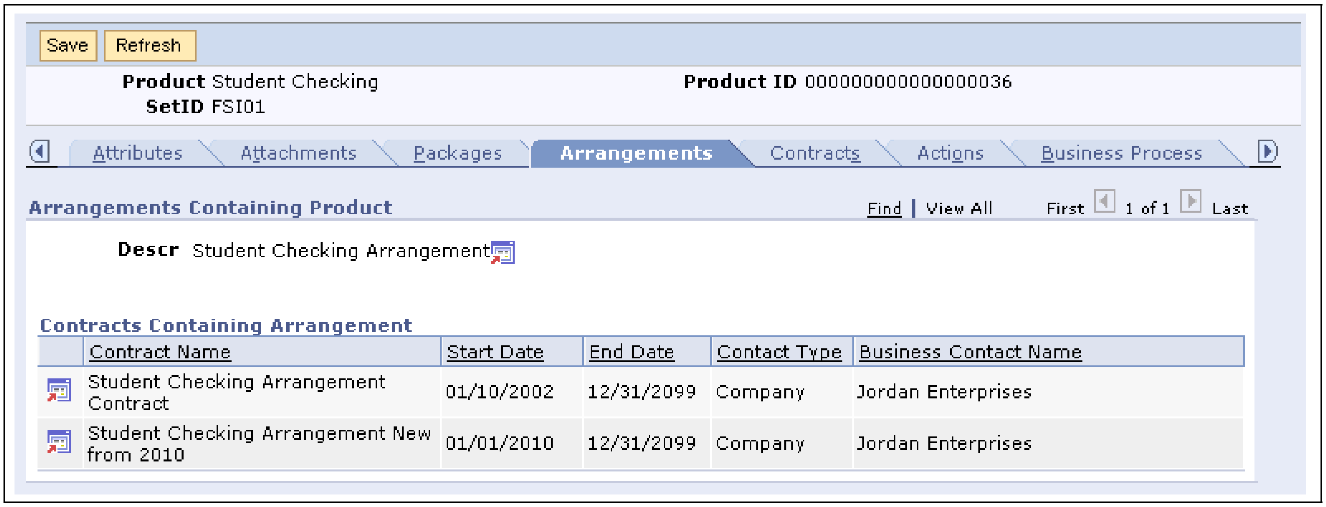
The system displays all packages that contain the product. Click the transfer button to drill down to package details.

See Also

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook, "Setting Up Products"

Viewing and Maintaining Arrangements

Access the Product Definition - Arrangements page.


Save
Refresh
Attributes
Attachments
Packages
Arrangements
Contracts
Actions
Business Process
Find
View All
First
1 of 1
Last

Product Student Checking **Product ID** 000000000000000036
SetID FSI01

Arrangements Containing Product

Descr Student Checking Arrangement

Contracts Containing Arrangement

Contract Name	Start Date	End Date	Contact Type	Business Contact Name
Student Checking Arrangement Contract	01/10/2002	12/31/2099	Company	Jordan Enterprises
Student Checking Arrangement New from 2010	01/01/2010	12/31/2099	Company	Jordan Enterprises

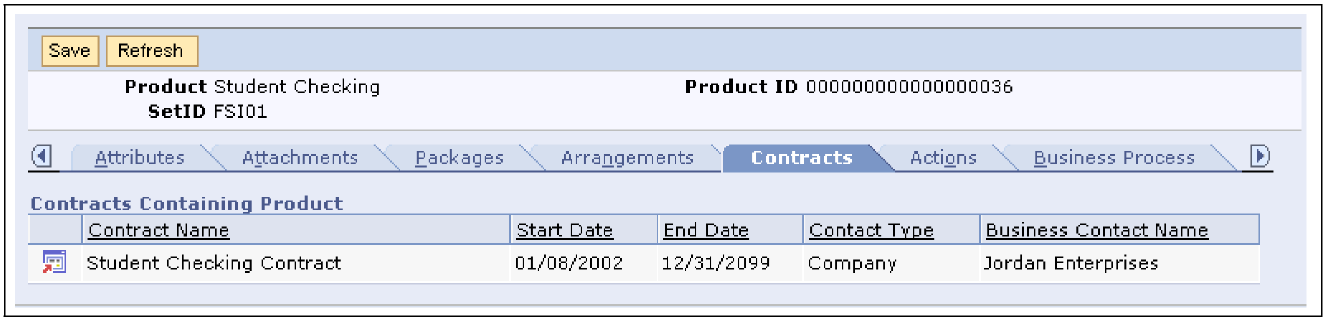
Product Definition - Arrangements page

The system displays the arrangements associated with the product. Click the transfer button in the Arrangements Containing Product row to access the Arrangement component, where you can view and update the record.

The system also displays the contracts that contain the arrangement. Click the transfer button in the Contracts Containing Arrangement row to access the Contract component, where you can view and update the record.

Viewing and Maintaining Contracts

Access the Product Definition - Contracts page.


Save
Refresh
Attributes
Attachments
Packages
Arrangements
Contracts
Actions
Business Process

Product Student Checking **Product ID** 000000000000000036
SetID FSI01

Contracts Containing Product

	Contract Name	Start Date	End Date	Contact Type	Business Contact Name
	Student Checking Contract	01/08/2002	12/31/2099	Company	Jordan Enterprises

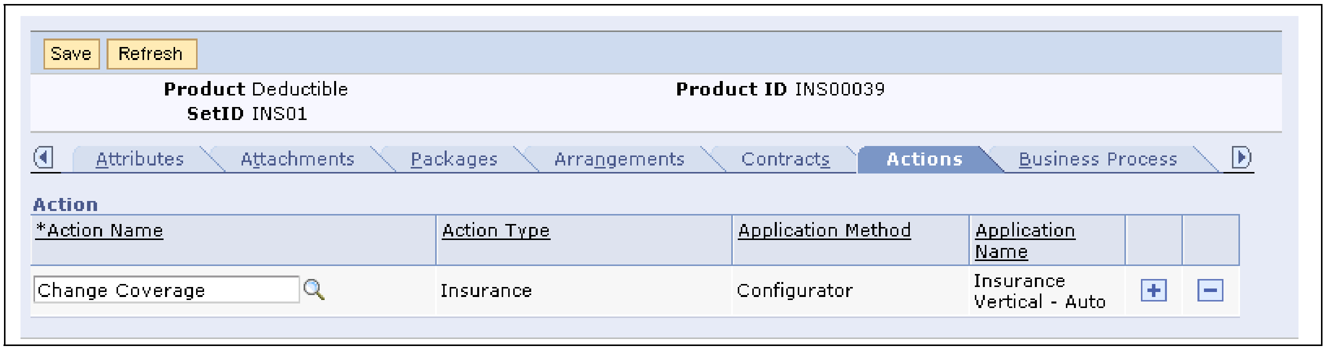
Product Definition - Contracts page

The system displays the contracts associated with the product.

Click the transfer button in the Contracts Containing Product row to access the Contracts component, where you can view and update the record.

Defining Actions

Access the Product Definition - Actions page.


Save
Refresh
Attributes
Attachments
Packages
Arrangements
Contracts
Actions
Business Process

Product Deductible **Product ID** INS00039
SetID INS01

Action

*Action Name	Action Type	Application Method	Application Name		
Change Coverage	Insurance	Configurator	Insurance Vertical - Auto	+	−

Product Definition - Actions page

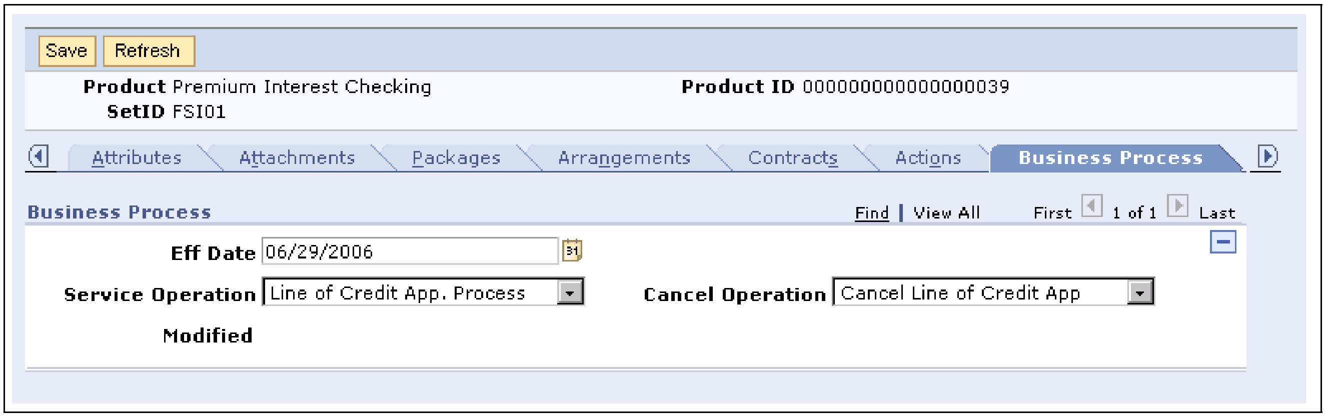
Action Name	Select an action to associate with the product or package. An action defines an activity that can be performed on the policy.
Action Type	Displays the action type defined in the Action component.
Application Method	Displays the application method defined in the Action component.
Application Name	Displays the name that appears in Web Self Service.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Working with Active Analytics Framework”

Initiating Business Processes

Access the Product Definition - Business Process page.


Save
Refresh
Attributes
Attachments
Packages
Arrangements
Contracts
Actions
Business Process
Business Process
Find | View All
First 1 of 1 Last

Product Premium Interest Checking
SetID FSI01
Product ID 000000000000000039

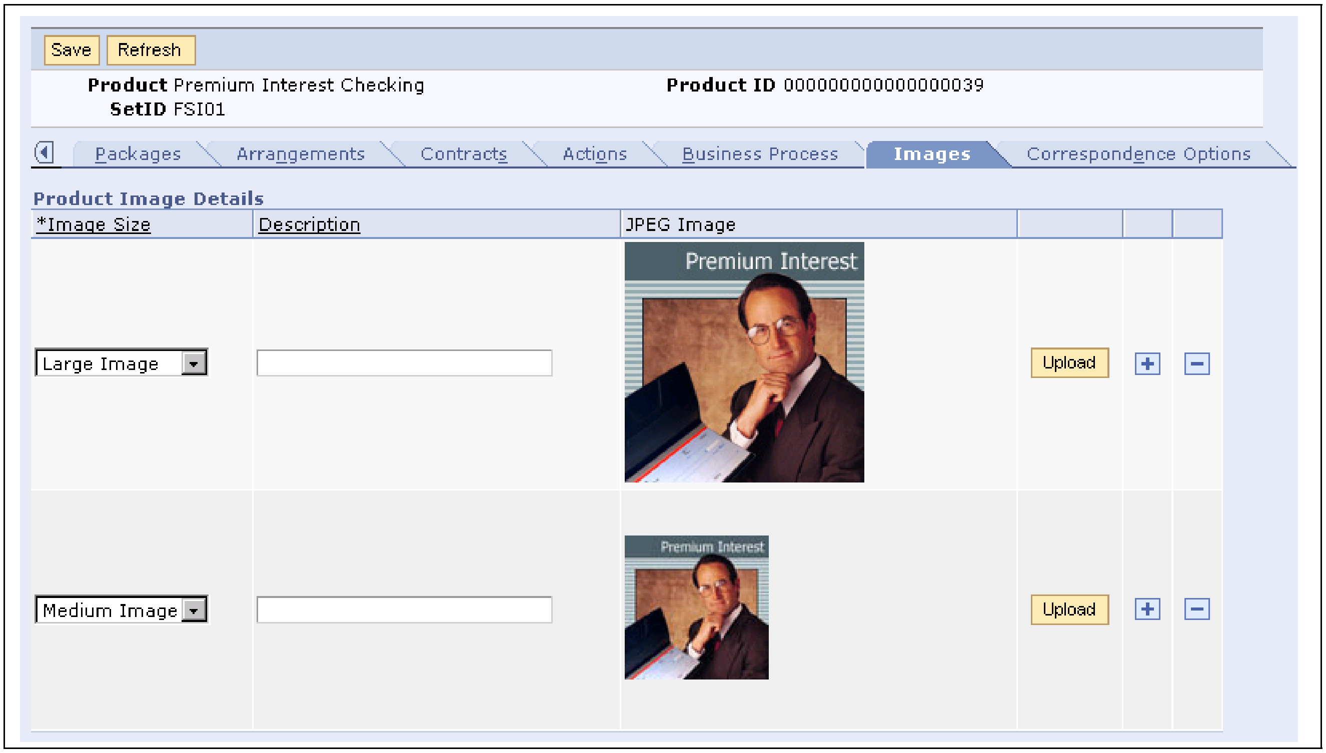
Eff Date 06/29/2006
Service Operation Line of Credit App. Process
Cancel Operation Cancel Line of Credit App
Modified

Product Definition - Business Process page

You can initiate business processes to be performed on the product or package.

Attaching Images

Access the Product Definition - Images page.


Save
Refresh
Packages
Arrangements
Contracts
Actions
Business Process
Images
Correspondence Options
Premium Interest
Premium Interest
Upload
Upload

Product Premium Interest Checking
SetID FSI01
Product ID 000000000000000039

Product Image Details

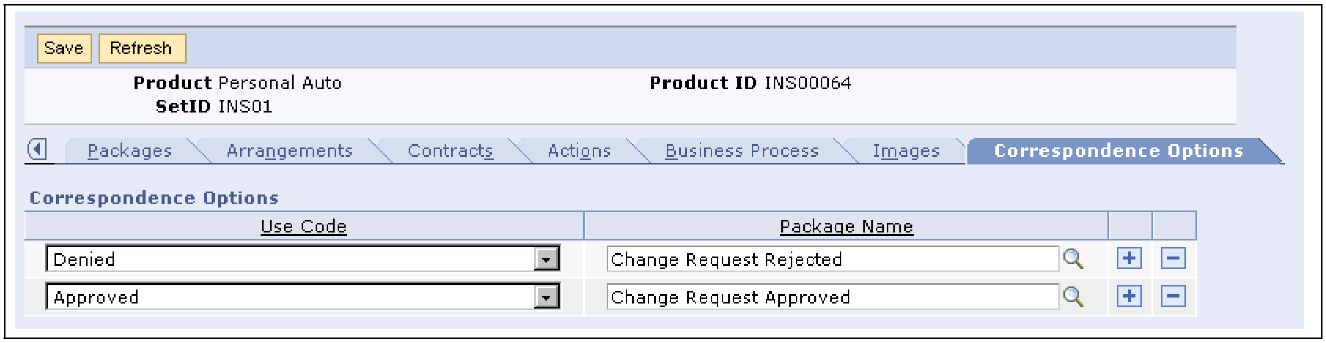
*Image Size	Description	JPEG Image
Large Image		
Medium Image		

Product Definition - Images page

You can associate images of different sizes with the product or package. The image will appear in the product catalog.

Defining Correspondence Options

Access the Product Definition - Correspondence Options page.



Product Personal Auto **Product ID** INS00064
SetID INS01

Correspondence Options

Use Code	Package Name
Denied	Change Request Rejected
Approved	Change Request Approved

Product Definition - Correspondence Options page

You can set up automatic correspondence to be sent based on selected actions.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Correspondence Management”

Defining Product Relationships

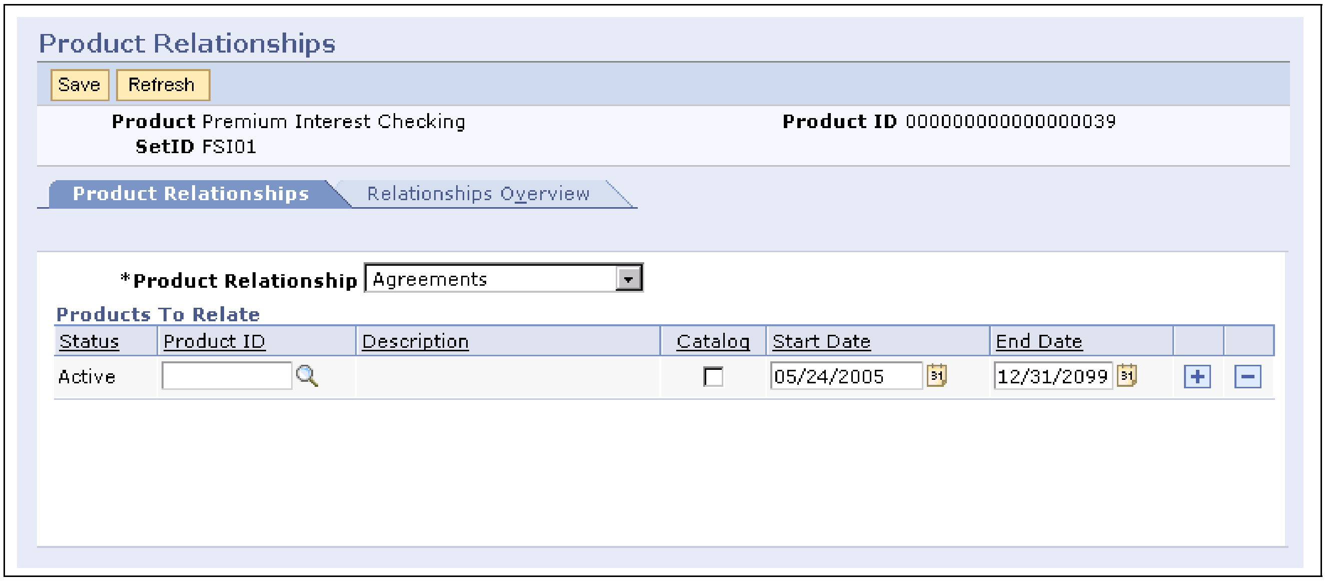
This section discusses defining relationships for products and product groups.

Pages Used to Define Product Relationships

Page Name	Object Name	Navigation	Usage
Product Relationships	PROD_RELATIONS	Products CRM, Product Relationships, Product Relationships	Define relationships with products and product packages.
Relationships - Relationships Overview	PROD_REL_OVERVIEW	Products CRM, Relationships, Product Relationships, Relationships Overview	View product and product group relationships.

Defining Product Relationships

Access the Product Relationships page.



Product Premium Interest Checking **Product ID** 000000000000000039
SetID FSI01

*Product Relationship: Agreements

Status	Product ID	Description	Catalog	Start Date	End Date
Active			☐	05/24/2005	12/31/2099

Product Relationships page

Product Relationship	Select the relationship to establish between products or product groups.
Product ID	Enter the product ID for the related product.
Catalog	Select to display the product in the catalog.
Start Date and End Date	Enter the start and end dates for the relationship.

See *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Setting Up Product Definitional Elements".

Setting Up Actions for Insurance

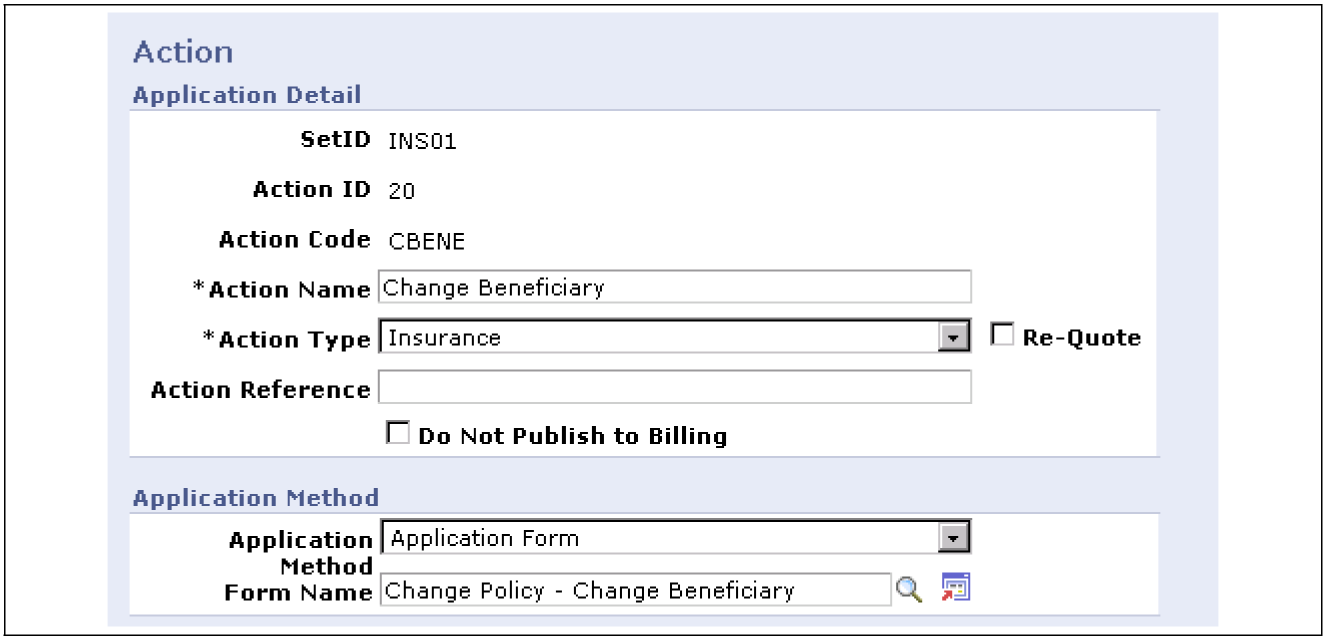
This section discusses how to set up actions.

Page Used to Set Up Actions

Page Name	Object Name	Navigation	Usage
Actions	RBT_ACTION	Set Up CRM, Product Related, Order Capture, Action, Action	Set up actions for products and product groups.

Setting Up Actions for Insurance

Access the Actions page.



SetID	INS01
Action ID	20
Action Code	CBENE
*Action Name	Change Beneficiary
*Action Type	Insurance ☐ Re-Quote
Action Reference	
	☐ Do Not Publish to Billing
Application Method	Application Form
Form Name	Change Policy - Change Beneficiary

Action page

Action Code	Displays the action code that you entered on the search page.
Action Name	Enter the name for the action or change.
Action Type	Select an action type.
Re-Quote	Select if the action needs a re-quote because of a changed premium.
Action Reference	This field is not used for insurance.
Application Method	Select the application method to be associated with the change. Values are *Application Form, Configurator,* and *Branch Script.*
Script Name	Select the script to be associated with the change.

CHAPTER 15

Working with Arrangements and Contracts

This chapter provides an overview of arrangements and contracts and discusses how to:

- Set up and maintain arrangements.
- Set up and maintain contracts.
- Set up and align attribute definitions for products, arrangements, contracts, and the sales process.

Understanding Arrangements and Contracts

This section discusses:

- Arrangements.
- Contracts.
- Contract retrieval.
- Terms and conditions retrieval.

Arrangements

An arrangement is associated with one and only one product or product package. A product or product package can be associated with zero, one, or more arrangements.

An arrangement has a set of terms and conditions in addition to the following three fields:

- Raise %
- Reduction %
- Waive contract fee flag

Note. Other terms and conditions can be defined by the system administrator using configurable attribute definitions.

Contracts

Contracts are available only to organizational customers. An organization can be a company, a partnership, or an alternate capacity.

A contract is an association between the following two parts:

- One and only one organization
- One and only one product, product package, or arrangement

A contract has a set of terms and conditions in addition to the following three fields:

- Raise %
- Reduction %
- Waive contract fee flag

Note. Additional terms and conditions can be defined on a contract. PeopleSoft enables system administrators to define terms and conditions for a certain type of object to fit their organization by using configurable attribute definitions.

The availability of a contract is controlled by start date and end date. In implementation, the system sets the default end date to December 31, 2099.

A contract is an entity different from a commercial product. It is possible that a product, product package, or arrangement is not associated with a contract. A contract is tied to an organization whereas an arrangement is not.

A contract is an entity different from an account. A contract is an agreement about an unsold product between the bank and an organization. An account is an agreement about a sold product between the bank and a customer.

It is possible for a product, a product package, or an arrangement to be associated with multiple contracts for an organization. These contracts may have overlaps on valid periods, which are defined by start date and end date.

If there are multiple contracts valid for a product and organization for a certain period of time, the sales process uses the newest contract featured by a later start date.

For example:

- P001 is ATM Checking product.
- P006 is an arrangement based on the product P001.
- C001 is a contract based on P006 for ADC Company valid between February 1, 2002 and March 31, 2002.

If the user tries to create a new contract, C002 for ADC Company based on P00—ATM Checking, valid between February 15, 2002 and March 31,2002, it is allowed. The system displays a message reminding the user about the existence of the multiple contracts for ADC Company on P001.

For the period between February 1, 2002 and February 14, 2002, C001 is the only valid contract based on P001. In the order capture process, when a customer selects P001, the system uses C001, which is the only contract valid during this period, to determine the terms and conditions.

For the period between February 15, 2002 and March 31, 2002, there are two valid contracts based on P00—C001 and C002. In the sales process, if a customer selects P001, the system uses C002, which is the newest contract among the contracts that are valid during this period, to determine the terms and conditions.

Contract Retrieval

During an agent-controlled sale to the contact of an organization, the system retrieves any available contract after the customer selects the product.

Agents can retrieve an available contract after verifying employment information. The employment information is verified by the agent using the verification key provided by the customer or by checking supporting documents.

The customer can choose to apply for the product with or without using the retrieved contract.

Note. Self-service users cannot retrieve an available contract and apply for a product using a contract.

Terms and Conditions Retrieval

When a customer selects a product or package during the sales process, a complete set of terms and conditions for the product or product package is retrieved:

- A complete set of terms and conditions is retrieved from the terms and conditions defined for product, product package, arrangement, or contract.
- The terms and conditions in an arrangement for a product or product package are retrieved only when the following two conditions are satisfied:
  - The customer's organization has a contract on that arrangement.
  - The system selects the newest contract (because of its later start date) from the multiple contracts that refer to the same product or product package.
- The terms and conditions defined in later entries override the terms and conditions defined in previous entries.

For example, P001 is ATM Checking, P006 is an arrangement for P001, and C001 is a contract for ADC Company and P006. An employee of ADC Company selects ATM Checking (P001) during the sales process and is interested in applying for an ATM checking account.

The terms and conditions defined in these entries are:

Entry	Term A	Term B	Term C	Term D	Term E	Term F
P001	TermA = 1	TermB = 2	TermC = 3	TermD = 4		
P006		TermB = 6	TermC = 8		TermE = 9	
C001	TermA = 12		TermC = 15			TermF = 18

1. The sales process gets terms and conditions from P001—ATM Checking:

P001	TermA = 1	TermB = 2	TermC = 3	TermD = 4		

2. Because this organization has a contract C001 on an arrangement P006 for this product P001, the system gets the terms and conditions from the arrangement P006 to override terms and conditions obtained from product P001:

P001	TermA = 1	TermB = 2	TermC = 3	TermD = 4		
P006	TermA = 1	TermB = 6	TermC = 8	TermD = 4	TermE = 9	

Terms B and C are overridden in this step. Term D is expanded in this step.

3. Finally, the system obtains terms and conditions from contract C001.

   These are the terms and conditions that appear during the sales process:

P001	TermA = 1	TermB = 2	TermC = 3	TermD = 4		
P006	TermA = 1	TermB = 6	TermC = 8	TermD = 4	TermE = 9	
C001	TermA = 12	TermB = 6	TermC = 15	TermD = 4	TermE = 9	TermF = 18

   Terms A and C are overridden in this step. Term F is expanded in this step.

Alignment of Attribute Definitions for Products, Arrangements, Contracts, and the Sales Process

To make product definition, arrangement definition, contract definition, and the sales process work together correctly, it is important to set up attribute definitions for these objects correctly.

To set up and align attribute definitions for products, arrangements, contracts, and the sales process:

1. Set up attribute definitions for products.

   The Object Type for products is *Product.*

2. Set up and align attribute definitions for arrangements.

   The Object Type for arrangements is also *Product.* The attribute set defined for arrangements must include the attribute set for products. Additional attributes other than those defined for products, specifically for arrangements, can be defined by providing certain conditions. Any attributes specific to arrangements but not controlled by Attribute Category values are internal arrangement attributes, not displayed during the sales process.

3. Set up and align attribute definitions for contracts.

   The Object Type for contracts is *Contract.* The attribute set defined for contracts must include the attribute set for products and the external attribute set for arrangements. Any attributes specific to contracts but not controlled by Attribute Category values are internal contract attributes, not displayed in the sales process.

4. Set up and align attribute definitions for the sales process.

   The Object Type for the sales process is *Sales Product Application.* The attribute set defined for the sales process must include the attribute set for products and the external attribute set for arrangements and contracts.

Setting Up and Maintaining Arrangements

This section discusses how to:

- Set up arrangements.

- View attributes.
- View arrangement contracts.

Note. An arrangement is defined in the same component where a product is defined. However, only the values defined on the Product Definition page, the Attributes page, and the Contracts page pertain to arrangements.

See Also

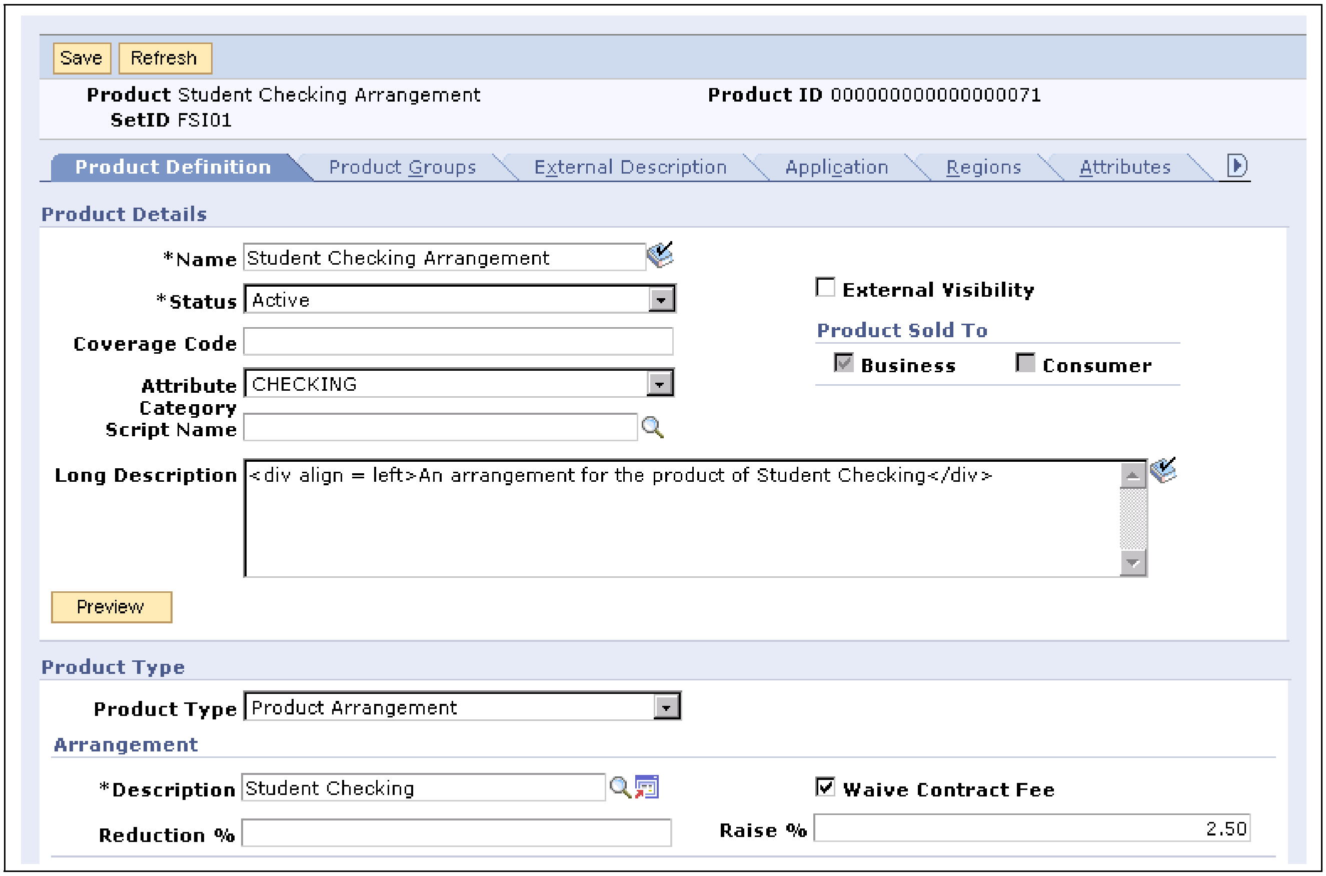
Chapter 14, "Working with Products in Financial Services and Insurance," page 119

Pages Used to Set Up and Maintain Arrangements

Page Name	Object Name	Navigation	Usage
Product Definition	RBFPROD_DEFN	Products CRM, Product Definition, Product Definition	Set up arrangement information.
Product Definition - Attributes	RB_ATTR_RUN_PROD	Products CRM, Product Definition, Product Definition, Attributes	View the attributes that are attached to this arrangement on the Product Definition page.
Product Definition - Contracts	RBF_PROD_ACNT	Products CRM, Product Definition, Product Definition, Contracts	View the contracts using the arrangement.

Setting Up Arrangements

Access the Product Definition page.



Product Student Checking Arrangement **Product ID** 000000000000000071
SetID FSI01

Product Details

*Name: Student Checking Arrangement
*Status: Active
Coverage Code:
Attribute Category: CHECKING
Script Name:
Long Description: <div align = left>An arrangement for the product of Student Checking</div>
☐ External Visibility
Product Sold To: ☑ Business ☐ Consumer

Product Type

Product Type: Product Arrangement

Arrangement

*Description: Student Checking
☑ Waive Contract Fee
Reduction %:
Raise %: 2.50

Product Definition page

Use the fields in the Product Type group box to define the product arrangement.

Product Details

Status	Select the status: *Active* or *Inactive*.
External Visibility	For an arrangement, the value of external visibility does not matter. What is important is the external visibility of its related product.
Coverage Code	Enter the coverage code. The insurance industry uses the coverage code to define the coverage provided by a product.
Product Sold to Business or Consumer	For an arrangement, the system automatically selects *Business,* because an arrangement can be sold only to organization customers.
Attribute Category	The system automatically populates this field with the attribute category for the related product. This ensures that the attributes defined for the arrangement align with the attributes defined for the related product.
Script Name	Select an upsell script for the product.
Long Description	Displays the extended arrangement description in HTML. This is the description that the internal agent sees.
Preview/Preview Area	Click the preview button to show the arrangement description in the preview area as it will appear on the sales process page.

Product Type

Product Type	Select to designate the product as an arrangement; you can then enter the component information in the corresponding fields.

Arrangement

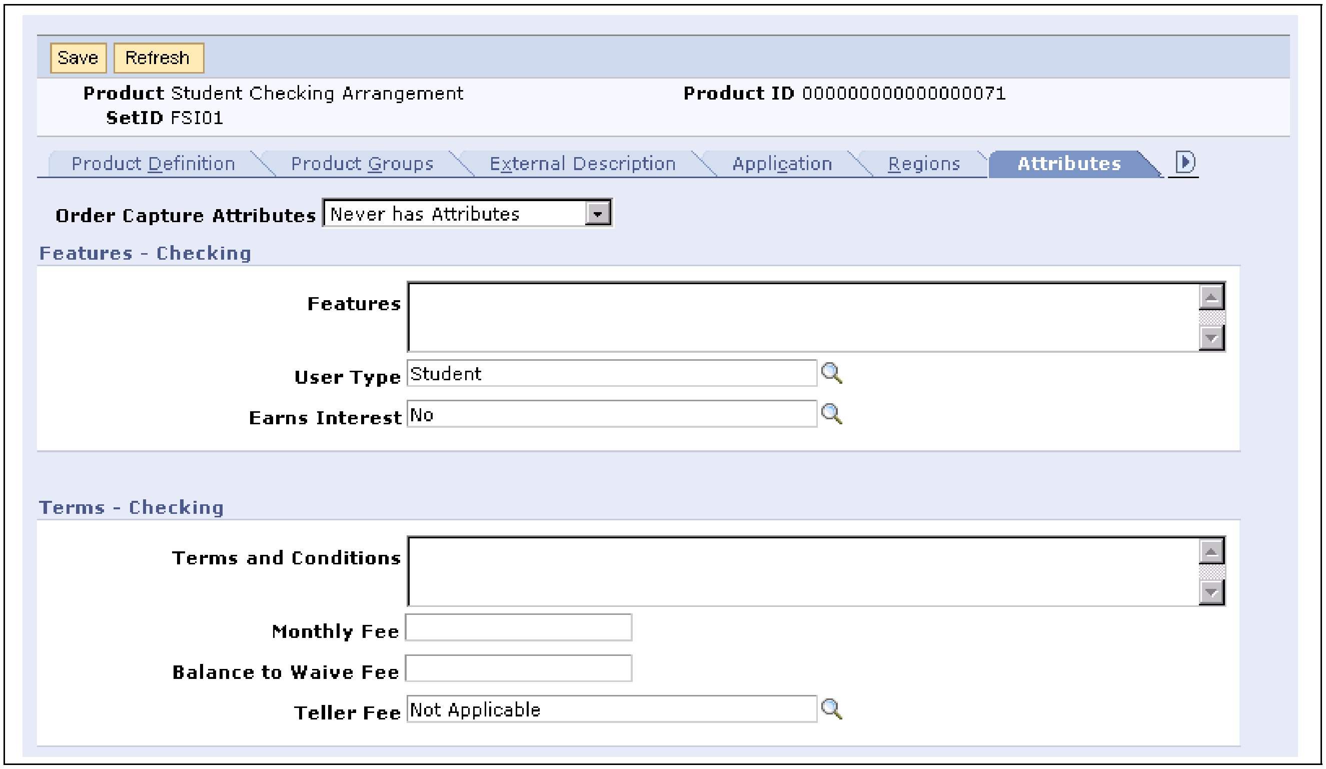
Waive Contract Fee	Select to waive the contract fee.
Reduction %	Enter the percentage of rate decrease, if applicable. For example, a mortgage arrangement may include an interest rate decrease.
Raise %	Enter the percentage of rate increase, if applicable. For example, a checking account arrangement may include an interest rate increase.

See Also

Chapter 14, "Working with Products in Financial Services and Insurance," page 119

Viewing Attributes

Access the Product Definition - Attributes page.


Save
Refresh
Product Definition
Product Groups
External Description
Application
Regions
Attributes
Features - Checking
Terms - Checking

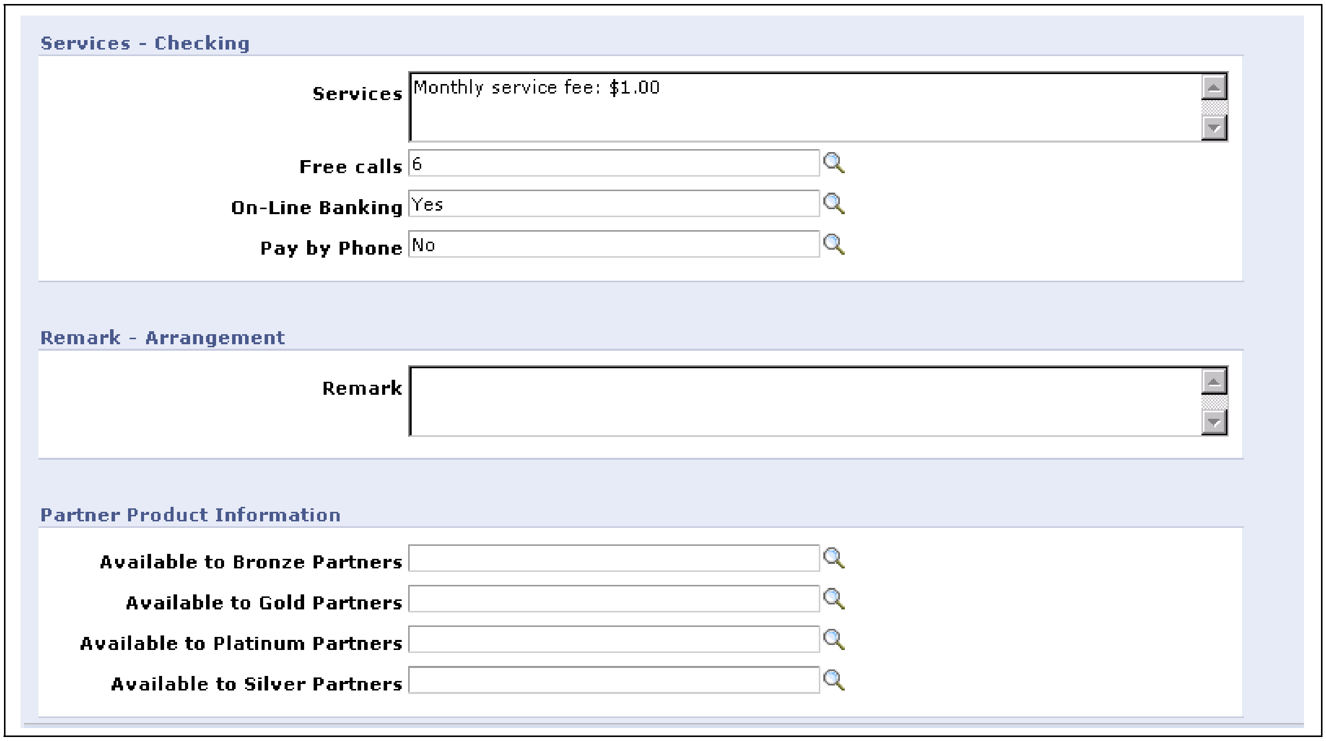
Product Student Checking Arrangement
SetID FSI01
Product ID 000000000000000071

Order Capture Attributes: Never has Attributes

Features:
User Type: Student
Earns Interest: No

Terms and Conditions:
Monthly Fee:
Balance to Waive Fee:
Teller Fee: Not Applicable

Product Definition - Attributes page (1 of 2)



Services - Checking

Services Monthly service fee: $1.00

Free calls 6

On-Line Banking Yes

Pay by Phone No

Remark - Arrangement

Remark

Partner Product Information

Available to Bronze Partners

Available to Gold Partners

Available to Platinum Partners

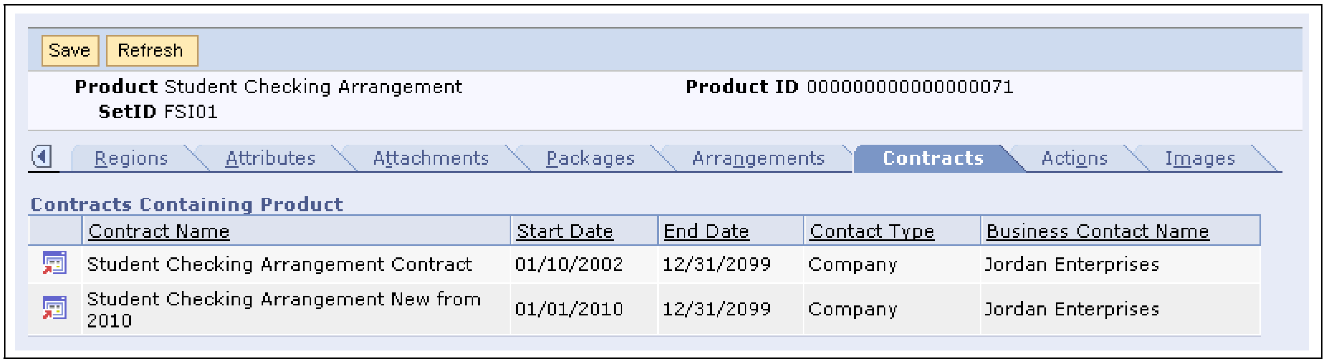
Available to Silver Partners

Product Definition - Attributes page (2 of 2)

Attributes are selected by the Attribute category selected on the Product Definition page. The Remark attribute is not controlled by the Attribute category; it appears for all arrangements. Data entered in the Remark field is only visible internally and does not appear during the sales process.

Viewing Arrangement Contracts

Access the Product Definition - Contracts page.



Product Student Checking Arrangement **Product ID** 000000000000000071

SetID FSI01

Contracts Containing Product

	Contract Name	Start Date	End Date	Contact Type	Business Contact Name
	Student Checking Arrangement Contract	01/10/2002	12/31/2099	Company	Jordan Enterprises
	Student Checking Arrangement New from 2010	01/01/2010	12/31/2099	Company	Jordan Enterprises

Product Definition - Contracts page

The system displays the contracts that have been associated with the arrangement. Click the transfer button in the contract row to access the Contracts component, where you can view and update the record.

Setting Up and Maintaining Contracts

You can set up contracts using individual products, product packages, or product arrangements.

This section discusses how to:

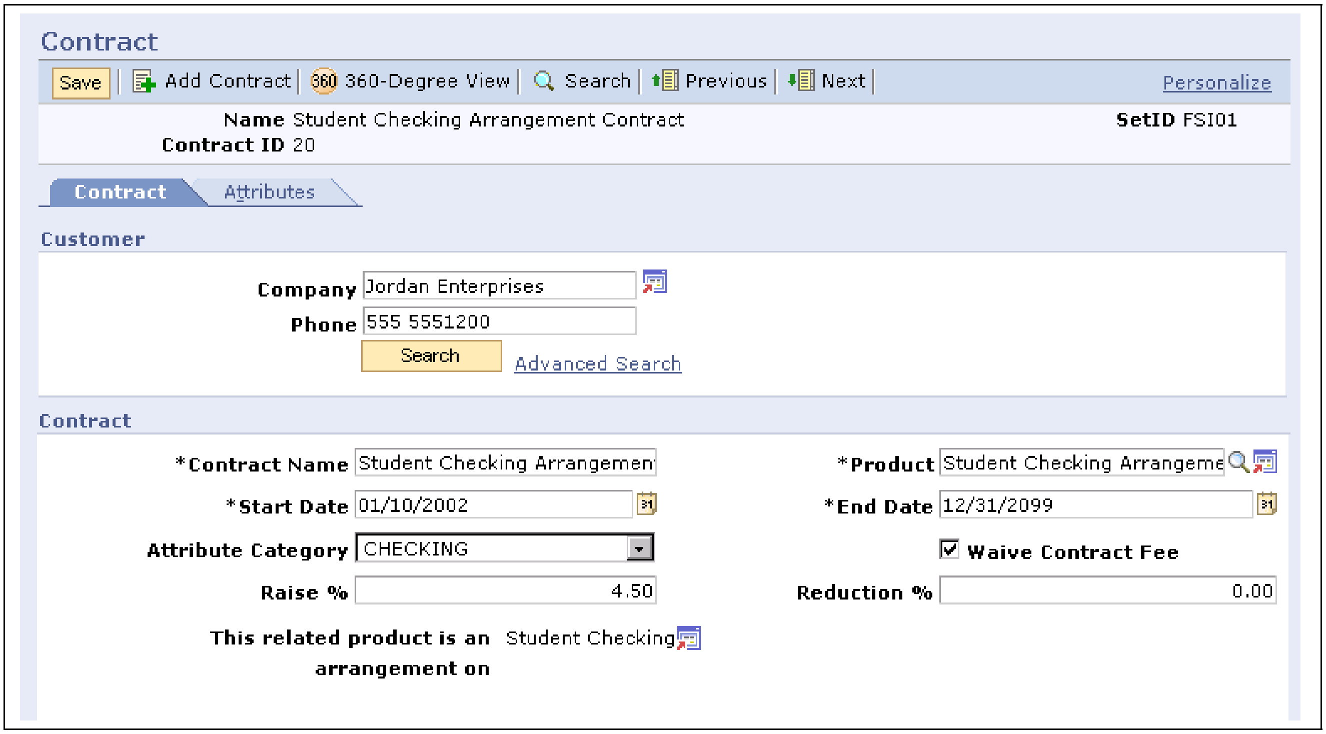
- Set up contracts.
- View contract attributes.

Pages Used to Set Up and Maintain Contracts

Page Name	Object Name	Navigation	Usage
Product/Arrangement Contracts - Contract	RBF_ACNT	Customer Contracts CRM, Product/Arrangement Contracts, Contract	Set up a contract and associate the contract with a business contact and product.
Product/Arrangement Contracts - Attributes	RBF_ATTR_ACNT	Customer Contracts CRM, Product/Arrangement Contracts, Contract, Attributes	View attributes associated with the contract.

Setting Up Contracts

Access the Product/Arrangement Contracts - Contract page.



Name Student Checking Arrangement Contract

SetID FSI01

Contract ID 20

Customer

Company Jordan Enterprises

Phone 555 5551200

Contract

*Contract Name Student Checking Arrangemen

*Product Student Checking Arrangeme

*Start Date 01/10/2002

*End Date 12/31/2099

Attribute Category CHECKING

☑ Waive Contract Fee

Raise % 4.50

Reduction % 0.00

This related product is an arrangement on Student Checking

Product/Arrangement Contracts - Contract page

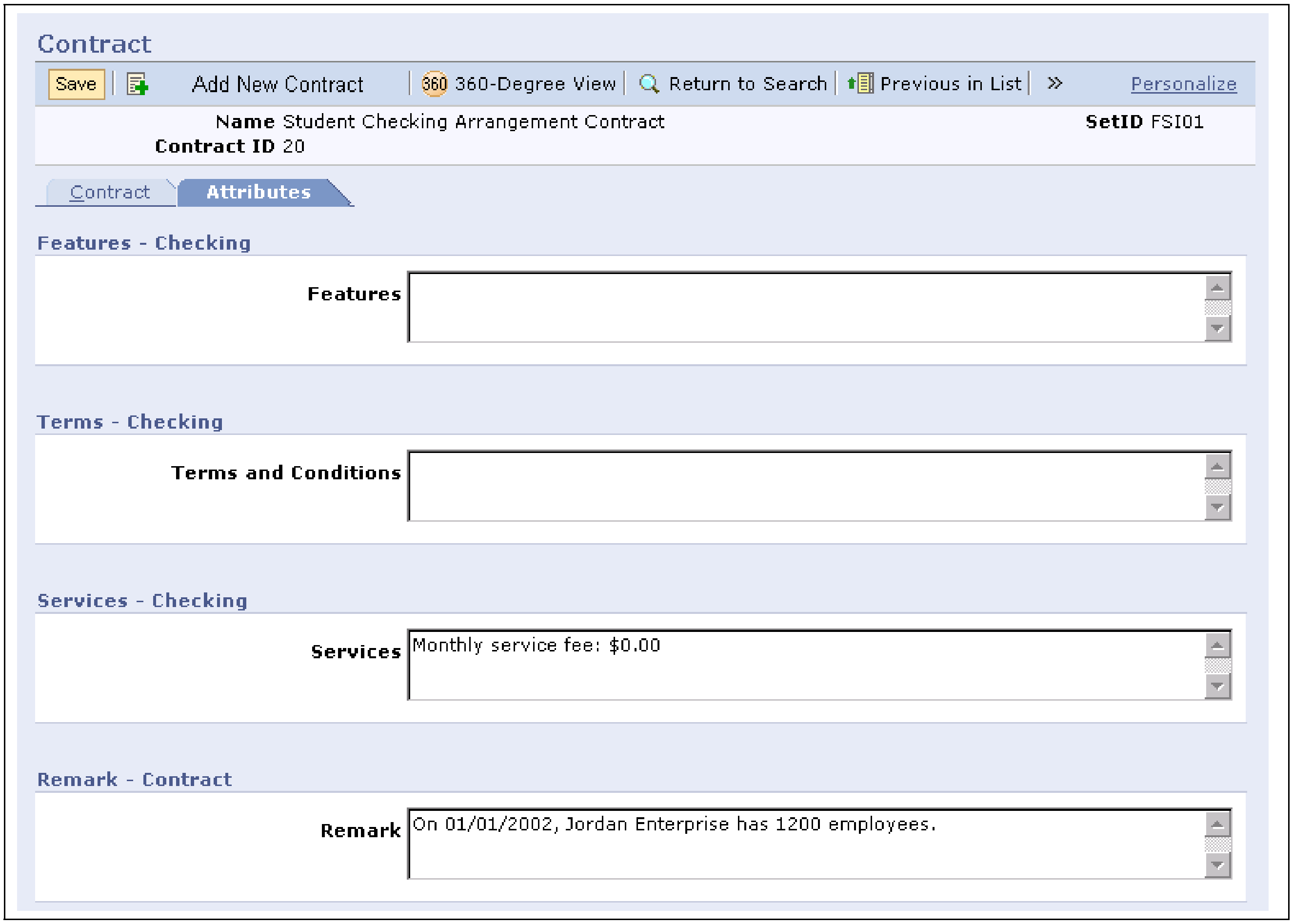
Contract Name	Enter a name for the contract. A contract can be associated with a product, a product package, or an arrangement.
Product	Enter the name of the product. If the product is an arrangement, the system displays the related product. You can access the Product component to view product details.
Start Date and **End Date**	Enter the start and end dates for the contract.

Attribute Category	The system automatically populates this field with the attribute category for the related product. This ensures that the attribute defined for the contract aligns with the attributes defined for the related product.
Waive Contract Fee	Select to waive the contract fee.
Raise %	Enter the percentage of rate increase, if applicable. If this contract is based on an arrangement, this field displays the value set for the arrangement.
Reduction %	Enter the percentage of rate decrease, if applicable. If this contract is based on an arrangement, this field displays the value set for the arrangement.
This related product is an arrangement on	If the contract is based on an arrangement, the system displays the name of the arrangement. Click the transfer button to view product details.

Note. If a contract definition is based on an arrangement, the Contract Raise %, Contract Reduction %, and Waive Contract Fee fields are populated with values defined for the arrangement. If the customer applies for a product based on an available contract, these values are obtained only from the contract, not from the arrangement.

Viewing Contract Attributes

Access the Product/Arrangement Contracts - Attributes page.


Contract
Save
Add New Contract
360-Degree View
Return to Search
Previous in List
Personalize
Contract
Attributes
Features - Checking
Features
Terms - Checking
Terms and Conditions
Services - Checking
Remark - Contract

Name Student Checking Arrangement Contract
SetID FSI01
Contract ID 20

Services Monthly service fee: $0.00

Remark On 01/01/2002, Jordan Enterprise has 1200 employees.

Product/Arrangement Contracts - Attributes page

The system displays the attribute categories applicable to the contract. In this example, the Remark attribute is not controlled by the attribute categories; it appears for all contracts. Data entered in the Remark field is only visible internally and does not appear during the sales process.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Configuring Attributes”

CHAPTER 16

Working with Financial Accounts

This chapter provides overviews of financial accounts, integration with legacy systems, and discusses how to:

- Set up account defaults.
- View financial account information.
- Modify financial accounts.

Understanding Financial Accounts

A *financial account* represents a holding by a customer of a product or service provided by financial services industries, including insurance, wealth management, and banks. The financial account function presents information from various legacy systems in a consistent interface. The financial account maps to the product, inheriting the terms and conditions from the product purchased by the customer.

The Financial Account record and its sub-records are created by the legacy administration systems. The Product order process functionality sends the completed application to the legacy system, the legacy system creates the account in their own area and then sends a message to CRM. The CRM system reads the inbound message and creates the account header record and the associated sub records inside its own system.

A financial account is held by a business contact. The business contact may be a person, company, partnership or an alternate capacity.

Each financial account record represents one financial services account. If a business contact has two checking accounts, there is one financial account instance in the financial services database for each.

A financial account is associated with the terms and conditions related to the product. Additional terms and conditions can be applicable to specific accounts.

Views of Financial Accounts

PeopleSoft delivers customer, agent, account manager, and application administrator permission groups for PeopleSoft Enterprise Banking Transactions, PeopleSoft Enterprise Bill Presentment and Account Management, PeopleSoft Enterprise Policy and Claims Presentment, and PeopleSoft Enterprise Client Management.

Customer

The self-service customer navigates to account detail records by way of the My Accounts pagelet.

My Accounts contains a listing of accounts for which the customer is the owner, authorized user, or beneficiary, or, in other words, has security matrix entry in his or her name. The account detail is read-only for the customer. No information can be changed on this page.

Agent

The financial services agent does not have permission to search the listing of account records held by customers. Agent access is strictly controlled. An agent can only view the details of an account held by a customer who is explicitly identified. Agents can view an account only when they identify the customer and navigate to the customer's 360-Degree View. Every entry of the agent to a particular customer's 360-Degree View is traced by access trace mechanism.

Account Manager and Administrator

The financial services account manager and the administrator has more authority to search for an existing account record.

There is a search page available to find an existing account record. The account detail is read-only. In addition, they can also see the accounts by navigating through the 360-Degree View as the agent does.

Financial Account Types

Financial account information is provided for a number of contract types that correspond to product types.

As PeopleSoft CRM applications are delivered, the following financial accounts are available:

- Checking account.
- Savings account.
- Credit account.
- Insurance policy.
- Investment account.
- Loan.

Understanding Integration with Legacy Systems

This section discusses integration requirements.

Two components must be configured for the integration to function correctly:

1. Integration Broker setup.
2. A legacy system can post the appropriate XML file to the uniform resource locator of the application messaging gateway. The PeopleSoft system then asynchronously subscribes to this data and loads it into the production tables. A legacy system can also choose to use a flat file to represent its data. An application engine process converts the flat file into an XML document that is in turn published to the application messaging gateway. The process run to perform this function automates the conversion of a flat file to an XML document and also the publishing process. For XML post, inbound data is validated during subscription. For flat files, data validation occurs during the publishing phase and again during the subscription phase.

The goal is to provide an integration framework to subscribe to inbound data from any legacy system. The two delivered methods of integration (XML and flat file) still go through the same enterprise integration point (EIP), which is the application messaging gateway.

Delivered XML Templates

PeopleSoft CRM delivers XML templates to perform the following:

- Add and update financial accounts.
- Set relationships.
- Set security matrix data.
- Set addresses for financial accounts.
- Set financial account fees.

Note. The file contains all of the necessary data definition tags. . The message data should be changed appropriately according to what data is being loaded. Additional transactions should be added as needed.

Delivered Flat File Templates

PeopleSoft CRM delivers flat file templates to perform the following:

- Add and update financial accounts. (RBF_FIN_ACCT_FULL_SYNC)

  Note. This is a sample and the file should be modified accordingly.

- Set relationships for the financial account. (RBF_FINACCT_RELATIONSHIPS)
- Set security matrix data. (RBF_FINACCT_SECURITY and RBF_FINACCT_SECURITY_BYROLE)
- Set addresses for financial accounts. (RBF_FINACCT_ADDRESS)
- Set account fees. (RBF_FINACCT_FEES)

Delivered Flat File Processes

PeopleSoft CRM delivers the flat file process—RBF_FIN_ITG—which runs to load a flat file depending on the configuration.

Assumptions for XML Integration

Review the following assumptions for XML integration:

- All messages must be active in Application Designer.
- The transactions must be set up in Integration Broker through PeopleSoft Internet Architecture, and they must be active.
- Financial account messages require the following fields in the header:
  - CUST_ACCT_NBR
  - SYSTEM_SOURCE_CD
  - PROD_SETID
  - PRODUCT_ID
  - BO_ID_OWNER
  - OWNER_BO_TYPE
  - FIN_ACCOUNT_STATUS

Note. PROD_SETID, PRODUCT_ID, AND OWNER_BO_TYPE must be either valid prompt values or valid translate values that exist in the PeopleSoft system. Therefore, any legacy system would need to synchronize the list of possible values for these fields with the PeopleSoft system.

- Legacy has to set the AUDIT_ACTN in the PSCAMA record in the XML file.

  The value of A is Add (INSERT), C is Change (UPDATE), and D is Delete.
- The message should contain the required fields of the parent and the child.
- Cannot insert a child RBF_CHECK_ACCT) without a parent (that is, RBF_FIN_ACCOUNT).
- If the account has a status of CLOSED, then the security message has to be sent by the legacy to delete the entries in the security matrix.

Financial account address message: CUST_ACCT_NBR and SYSTEM_SOURCE_CD has to be associated with the message.

Relationships message:

- REL_TYPE_ID, ROLE_TYPE_ID are assumed to exist both in legacy and PeopleSoft CRM.
- Legacy sends the ID values for relationship type to set the relationships.
- In the relationship message, the first placeholder is the financial account information and the second placeholder is the business object with which the relationship is targeted.
- OWNER_BO_TYPE should be sent by legacy, which is one of the following:
  - ACC — Financial Account
  - PER — Person
  - COM — Company
  - ALT — Alternate Capacity
  - PAR — Partnership
- When relationships end, a message has to be sent from legacy with an end date of the relationship.

Security message:

- Legacy sends the XML file with the following fields:
  - FIRST_NAME
  - MIDDLE_NAME
  - LAST_NAME
  - TIN
  - TIN_TYPE
  - NATIONAL_ID
  - COUNTRY_NM_FORMAT
  - SYSTEM_SOURCE_CD
  - CUST_ACCT_NBR
  - SRTY_FUNCTION_CD
  - APPROVAL_FLG (Y/N)

  - SRTY_OPERATOR_CD
  - SRTY_AMOUNT
  - SRTY_ROLE_CD

  BO_IDs are determined from the PeopleSoft side and the security matrix is populated accordingly. If business object does not exist, the PeopleSoft CRM system creates a business object and sets up the security matrix accordingly.

- To populate the security matrix by role, legacy sends the following information in the XML file.

  Legacy has to know the SRTY_ROLE_CD, which exists in PeopleSoft CRM:

  - FIRST_NAME
  - MIDDLE_NAME
  - LAST_NAME
  - TIN
  - NATIONAL_ID
  - TIN_TYPE
  - COUNTRY_NM_FORMAT
  - SYSTEM_SOURCE_CD
  - CUST_ACCT_NBR
  - SRTY_ROLE_CD

Assumptions for File Integration

This process employs a mapping of fields in the flat file. Column headings are specified on the first line of the flat file. These column headings are mapped to actual PeopleSoft field names on the setup page. This mapping is saved and used when loading a flat file. In this way, order of the fields is irrelevant. Headings are used to determine which values correspond to which fields.

To set up the file upload:

- Map the flat file in the Setup component.
- Provide the file map name.
- Specify the delimiter.
- Ensure that all records to be included in the flat file are mapped here in the setup page.

  Select the record name (that is, RBF_FIN_ACCOUNT) from the prompt. Click the default fields button to automatically populate the grid with the fields of that record. Select the fields that you want to include as headings in your flat file. The flat file field name specified here must match the corresponding column heading that you will use in your flat file.
- Add as many records and fields as is necessary.
- Save the mapping.

To set up the flat file:

- Ensure that the file being used matches the previously created file mapping.
- Ensure that column headings of the file match the flat file field names specified in the mapping.

To run the file upload process:

- Select the File Upload component.
- Add a run control ID.
- Enter the file name (direct or absolute path of the file—for example, c:\pt842\appserv\prcs\dbname\files \filename.txt).

  The file must reside on the same computer as the process scheduler.
- Select the file map name from the prompt.

  This map should be the mapping of the file that you will be using.
- Select Run and select the process RBF_FIN_ITG, and then click OK.
- Validate in the process monitor that the process has a status of success.

The log file generated by this process is dumped into the root directory of the process scheduler (ps_home\appserv\prcs\dbname\files).

Setting Up Account Defaults

This section discusses how to set up account defaults.

Pages Used to Set Up Account Defaults

Page Name	Object Name	Navigation	Usage
FSI Options	RBF_OPTIONS	Set Up CRM, Product Related, Financial Services, FSI Options	Set up default values for a financial account.

Defining Account Defaults

Access the FSI Options page.

See Chapter 4, “Setting Up Industry-Specific Functionality,” page 17.

Viewing Financial Account Information

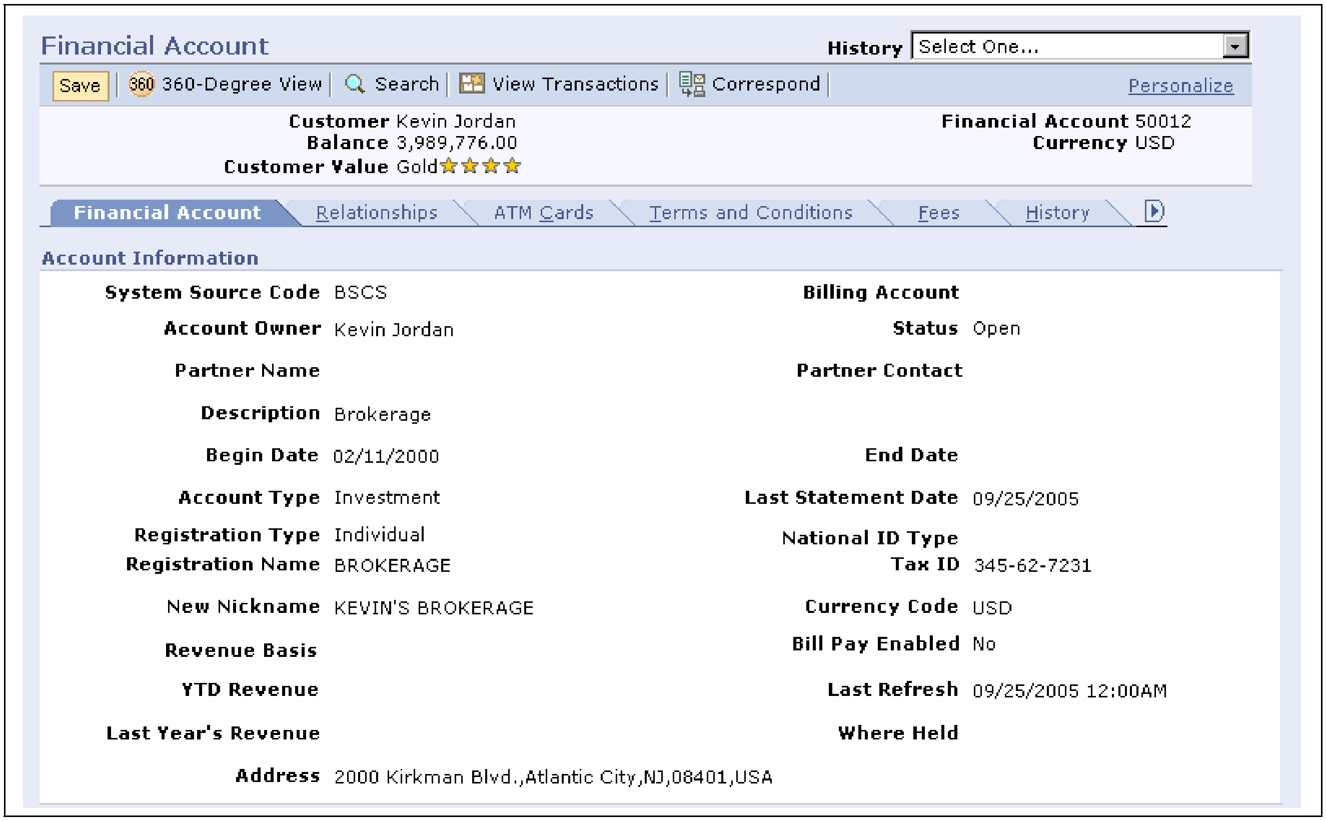
This section discusses how to view financial account information.

Pages Used to View Financial Account Information

Page Name	Object Name	Navigation	Usage
Financial Account	RBF_FIN_ACCOUNT	Customer Accounts, Review Financial Accounts, Financial Account	View general account information. The Financial Account page varies depending on the type of account.
Financial Account - Relationships	RBF_ACCT_RELATIONS	Customer Accounts, Review Financial Account, Financial Account, Relationships	View all relationships that are associated with the account.
Financial Account - ATM Cards	RBF_ACCT_ATM_CARDS	Customer Accounts, Review Financial Account, Financial Account, ATM Cards	View all ATM cards that are associated with the account.
Financial Account - Terms and Conditions	RBF_ACCT_ATTR	Customer Accounts, Review Financial Account, Financial Account, Terms and Conditions	View the terms and conditions that are associated with the account.
Financial Account - Fees	RBF_FINACCT_FEES	Customer Accounts, Review Financial Account, Financial Account, Fees	View all account fees that are associated with the account.
Financial Account - Claims	RBI_CLAIM_HIST	Customer Accounts, Review Financial Account, Financial Account, Claims	View claims against insurance policies owned by the customer.
Financial Account - History	RBF_ACTADR_HIST	Customer Accounts, Review Financial Account, Financial Account, Address History	View the address and audit history that is associated with the account.
Financial Account - Cases	RBF_FIN_CASE_VW_PG	Customer Accounts, Review Financial Accounts, Financial Account, Cases	Tracks cases associated to the account.
Financial Account - Applications	RBF_FIN_RO_HISTORY	Customer Accounts, Review Financial Accounts, Financial Account, Applications	Tracks history of customer applications for products and services.

Viewing Financial Accounts

Access the Financial Account page.


Financial Account
History Select One...
Save
360-Degree View
Search
View Transactions
Correspond
Personalize
Financial Account
Relationships
ATM Cards
Terms and Conditions
Fees
History
Account Information

Customer Kevin Jordan
Balance 3,989,776.00
Customer Value Gold★★★★
Financial Account 50012
Currency USD

System Source Code BSCS
Billing Account
Account Owner Kevin Jordan
Status Open
Partner Name
Partner Contact
Description Brokerage
Begin Date 02/11/2000
End Date
Account Type Investment
Last Statement Date 09/25/2005
Registration Type Individual
National ID Type
Registration Name BROKERAGE
Tax ID 345-62-7231
New Nickname KEVIN'S BROKERAGE
Currency Code USD
Revenue Basis
Bill Pay Enabled No
YTD Revenue
Last Refresh 09/25/2005 12:00AM
Last Year's Revenue
Where Held
Address 2000 Kirkman Blvd.,Atlantic City,NJ,08401,USA

Financial Account page

Note. The view of the Financial Account page varies with the Account Type. For example, if the account is an *Investment Account*, only the Investment Account group box is displayed on the Financial Account page. The user will not see a group box for Insurance accounts, Credit accounts, and so on.

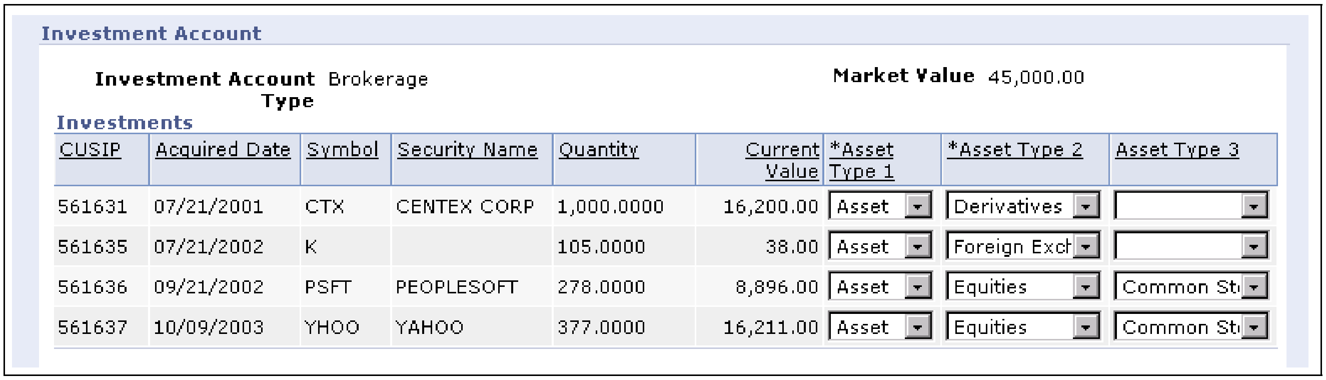
Account Information

System Source Code	Legacy data. One translate value, *BSCS*, is delivered.
Billing Account	The billing account that is associated to the financial account.
Account Owner	The name of the account owner or primary name that is defined for the account.
Status	The current status of the account. Values are: *Open*, *Closed*, *Inactive*, *Pending Open*, *Pending Closed,* or *Hold*.
Partner Name	The name of the partner associated with the customer.
Partner Contact	The contact for the partner.
Description	The description of the account.
Begin Dateand **End Date**	The date that the account was opened. and the date that the account was closed, if applicable.
Account Type	The type of account. Values are: *Checking*, *Savings*, *Credit*, *Insurance*, or *Investment*.
Last Statement Date	The date that the most recent statement was calculated and issued.
Registration Type	The account registration type.

	Under Personal accounts, the values are: *Individual, Joint with rights of survivorship, Tenants in common, Community property, Named beneficiary, Custodial account for minor,* or *Trust.* Under Business accounts, the values are: *Corporation, Partnership,* or *LLC.*
TIN Type(Tax Identification Number Type)	The taxpayer identification type. Values are: *SSN*, *EIN*, or *ITIN*.
Registration Name	The name that is given to the account by the bank when registering the account.
Tax ID	The taxpayer identification number of the account holder.
New Nickname	The nickname that is given to the account by the owner.
Currency Code	The code of the currency in which the account is held.
Last Refresh	The date and time that this record was last refreshed by the legacy system.
Bill Pay Enabled	Determines whether the Billing Account component is enabled for the account.
YTD Revenue(Year to Date Revenue)	The amount the financial institution has earned from the account year-to-date.
Revenue Basis	The basis for the revenue, either *Annual* or *Monthly*.
Last Year's Revenue	The amount the financial institution earned from the account in the previous year.
Where Held	A Wealth Management field indicating the bank where the account is held.
Address	Address for the account holder.
Asset Type 1, Asset Type 2, and Asset Type 3	If assets are a part of the account, this lists the type of asset. These values are used primarily in PeopleSoft Enterprise Client Management.

Investment Account

Access Investment Account information on the Financial Account page.



Investment Account

Investment Account Type Brokerage

Market Value 45,000.00

Investments

CUSIP	Acquired Date	Symbol	Security Name	Quantity	Current Value	*Asset Type 1	*Asset Type 2	Asset Type 3
561631	07/21/2001	CTX	CENTEX CORP	1,000.0000	16,200.00	Asset	Derivatives	
561635	07/21/2002	K		105.0000	38.00	Asset	Foreign Exch	
561636	09/21/2002	PSFT	PEOPLESOFT	278.0000	8,896.00	Asset	Equities	Common St
561637	10/09/2003	YHOO	YAHOO	377.0000	16,211.00	Asset	Equities	Common St

Financial Account page - Investment Account

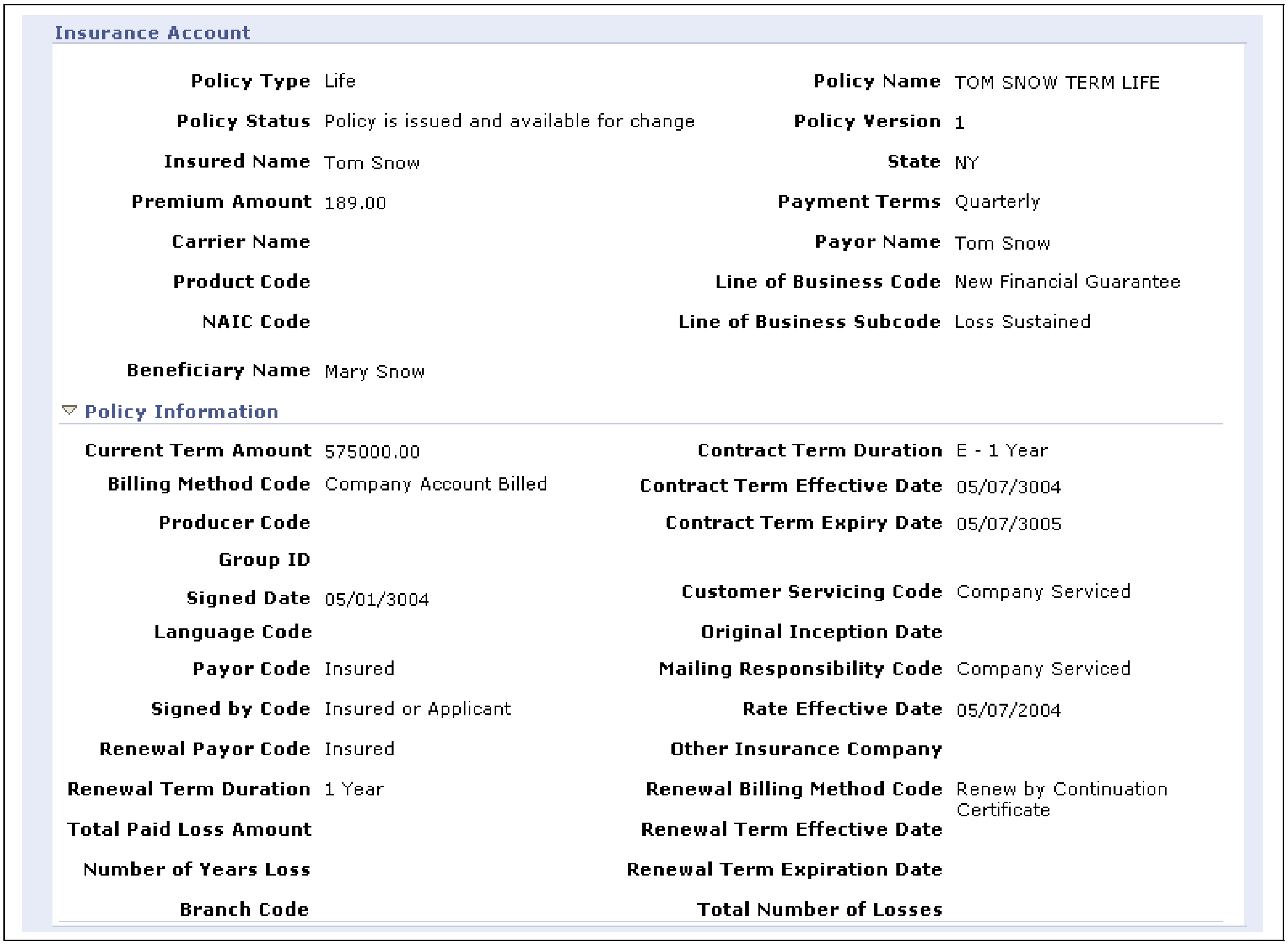
Investment Account Type	The investment account type. Values are: *Brokerage, Margin, Securities Custody, Investment Management, Trust, 401(k), Option Account, ESPP,* or *IRA.*
Market Value	The current market value of all the investments that are in the account.

The fields in the Investment Account group box display information about each holding in the investment account.

CUSIP (Committee on Uniform Securities and Identification Procedures)	A number that uniquely identifies a given security. For example, the CUSIP number for Oracle common stock is 68389X105. CUSIP is an acronym for the Committee on Uniform Securities and Identification Procedures, the standards body that created and maintains the classification system. Foreign securities have a similar number called the CINS number.
Acquired Date	The date that the investment was acquired.
Symbol	The stock symbol for the security.
Security Name	The name of the security.
Quantity	The number of investment units held.
Current Value	The current value of the investment.
Asset Type 1, Asset Type 2, and Asset Type 3	Define the type of asset.

Insurance Account

View Insurance Account information on the Financial Account page.



Insurance Account

Policy Type	Life	**Policy Name**	TOM SNOW TERM LIFE
Policy Status	Policy is issued and available for change	**Policy Version**	1
Insured Name	Tom Snow	**State**	NY
Premium Amount	189.00	**Payment Terms**	Quarterly
Carrier Name		**Payor Name**	Tom Snow
Product Code		**Line of Business Code**	New Financial Guarantee
NAIC Code		**Line of Business Subcode**	Loss Sustained
Beneficiary Name	Mary Snow		

▽ Policy Information

Current Term Amount	575000.00	**Contract Term Duration**	E - 1 Year
Billing Method Code	Company Account Billed	**Contract Term Effective Date**	05/07/3004
Producer Code		**Contract Term Expiry Date**	05/07/3005
Group ID			
Signed Date	05/01/3004	**Customer Servicing Code**	Company Serviced
Language Code		**Original Inception Date**	
Payor Code	Insured	**Mailing Responsibility Code**	Company Serviced
Signed by Code	Insured or Applicant	**Rate Effective Date**	05/07/2004
Renewal Payor Code	Insured	**Other Insurance Company**	
Renewal Term Duration	1 Year	**Renewal Billing Method Code**	Renew by Continuation Certificate
Total Paid Loss Amount		**Renewal Term Effective Date**	
Number of Years Loss		**Renewal Term Expiration Date**	
Branch Code		**Total Number of Losses**	

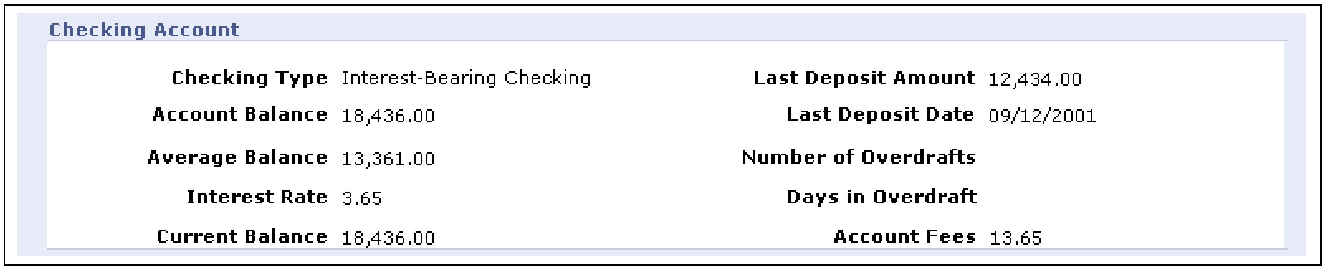
Financial Account page - Insurance Account

All fields are defined in the *PeopleSoft Policy and Claims Presentment PeopleBook.*

See *PeopleSoft Enterprise Policy and Claims Presentment 9 PeopleBook*, "Working with Policies".

Checking Account

View Checking Account information on the Financial Account page.



Checking Account

Checking Type	Interest-Bearing Checking	**Last Deposit Amount**	12,434.00
Account Balance	18,436.00	**Last Deposit Date**	09/12/2001
Average Balance	13,361.00	**Number of Overdrafts**	
Interest Rate	3.65	**Days in Overdraft**	
Current Balance	18,436.00	**Account Fees**	13.65

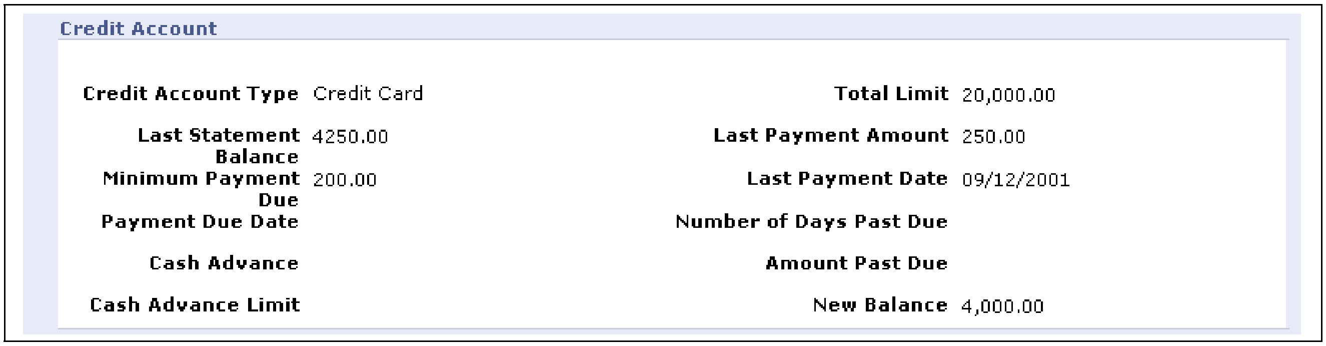
Financial Account page - Checking Account

Checking Type	The checking account type. Values are: *Regular*, *Interest Bearing*, *Private Banking*, *Business*, *Student*, or *ATM Checking*.
Account Balance	The available balance for the account showing funds that are available for withdrawal.

Average Balance	The average balance over the most recent accounting period.
Interest Rate	The interest rate if the account pays interest on funds on deposit.
Current Balance	The current balance, which includes deposits that have not yet been cleared.
Last Deposit Amount	The amount of the last deposit.
Last Deposit Date	The date of the last deposit.
Number of Overdrafts	The number of overdrafts that are in the most recent accounting period.
Days in Overdraft	The number of days that the account has been overdrawn in the current accounting period.
Account Fees	Cumulative total of account fees that have been charged to the account.

Credit Account

View Credit Account information on the Financial Account page.



Credit Account

Credit Account Type	Credit Card	Total Limit	20,000.00
Last Statement Balance	4250.00	Last Payment Amount	250.00
Minimum Payment Due	200.00	Last Payment Date	09/12/2001
Payment Due Date		Number of Days Past Due	
Cash Advance		Amount Past Due	
Cash Advance Limit		New Balance	4,000.00

Financial Account page - Credit Account

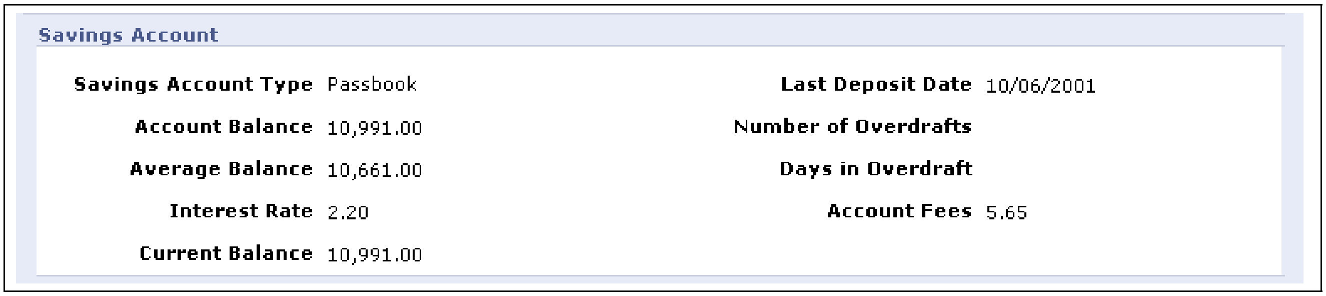
See *PeopleSoft Enterprise Banking Transactions 9 PeopleBook*, “PeopleSoft Enterprise Banking Transactions 9 Preface”.

Credit Account Type	The credit account type. Values are: *Credit Card*, *Personal Unsecured Loan*, *Auto Loan*, *Mortgage Loan*, *Home Equity Loan*, or *Small Business Loan*.
Last Statement Balance	The outstanding balance when the last statement was calculated and issued.
Minimum Payment Due	The minimum payment due as shown on the last statement.
Payment Due Date	The payment due date.
Cash Advance	The amount that is used as a cash advance.
Cash Advance Limit	The cash advance limit that is available on a credit card.
Total Limit	The total limit that is available on a credit card.
Last Payment Amount	The amount of the last payment that was made on the account.
Last Payment Date	The date that the last payment was made on the account.
Number of Days Past Due	The number of days that the account payment was past due in the current accounting period.
Amount Past Due	The amount of the past due payment in the current accounting period.

New Balance	The current balance reflecting all charges and payments.

Savings Account

View Savings Account information on the Financial Account page.



Savings Account Type	Passbook	Last Deposit Date	10/06/2001
Account Balance	10,991.00	Number of Overdrafts	
Average Balance	10,661.00	Days in Overdraft	
Interest Rate	2.20	Account Fees	5.65
Current Balance	10,991.00		

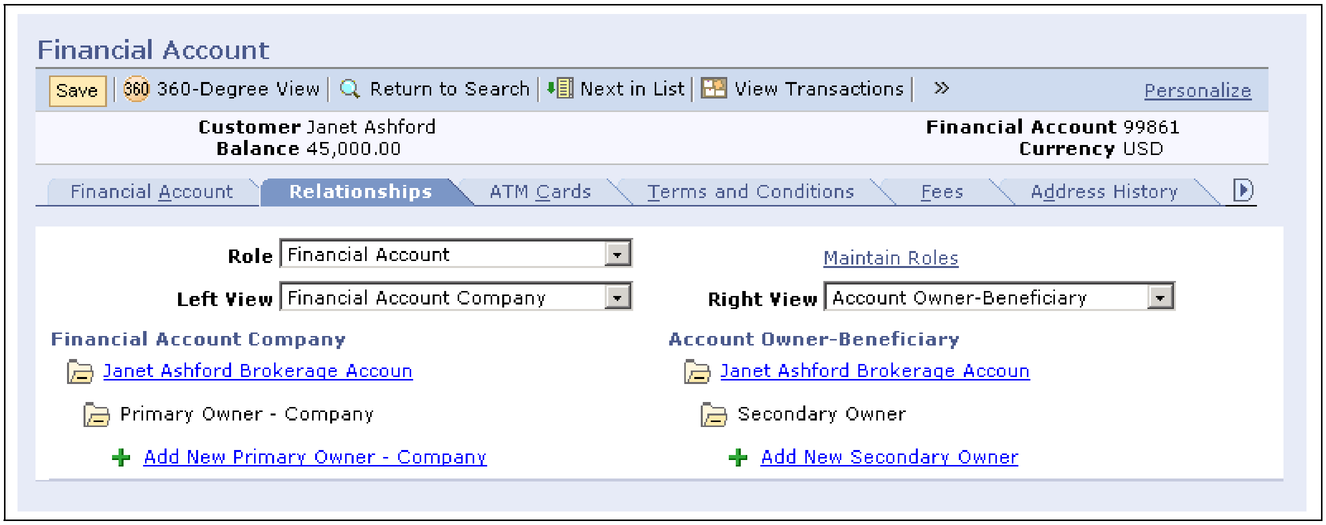
Financial Account page - Savings Account

Savings Account Type	The savings account type. Values are: *Regular/Money Market*, *Passbook*, or *Certificate of Deposit*.
Account Balance	The available balance for the account showing funds that are available for withdrawal.
Average Balance	The average balance over the most recent accounting period.
Interest Rate	The interest rate paid on funds that are on deposit.
Current Balance	The current balance, which includes deposits that have not yet been cleared.
Last Deposit Date	The date of the last deposit.
Number of Overdrafts	The number of overdrafts in the most recent accounting period.
Days in Overdraft	The number of days that the account has been overdrawn in the current accounting period.
Account Fees	The fees that are charged to the account in the current accounting period.

See *PeopleSoft Enterprise Banking Transactions 9 PeopleBook*, “PeopleSoft Enterprise Banking Transactions 9 Preface”.

Working with Relationships

Access the Financial Accounts - Relationships page.


Financial Account
Save
360-Degree View
Return to Search
Next in List
View Transactions
Personalize
Financial Account
Relationships
ATM Cards
Terms and Conditions
Fees
Address History
Maintain Roles
Add New Primary Owner - Company
Add New Secondary Owner

Customer Janet Ashford
Balance 45,000.00
Financial Account 99861
Currency USD

Role Financial Account
Left View Financial Account Company
Right View Account Owner-Beneficiary

Financial Account Company
- Janet Ashford Brokerage Accoun
  - Primary Owner - Company

Account Owner-Beneficiary
- Janet Ashford Brokerage Accoun
  - Secondary Owner

Financial Account - Relationships page

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Working with the Relationship Viewer," Viewing and Maintaining Relationships and Roles.

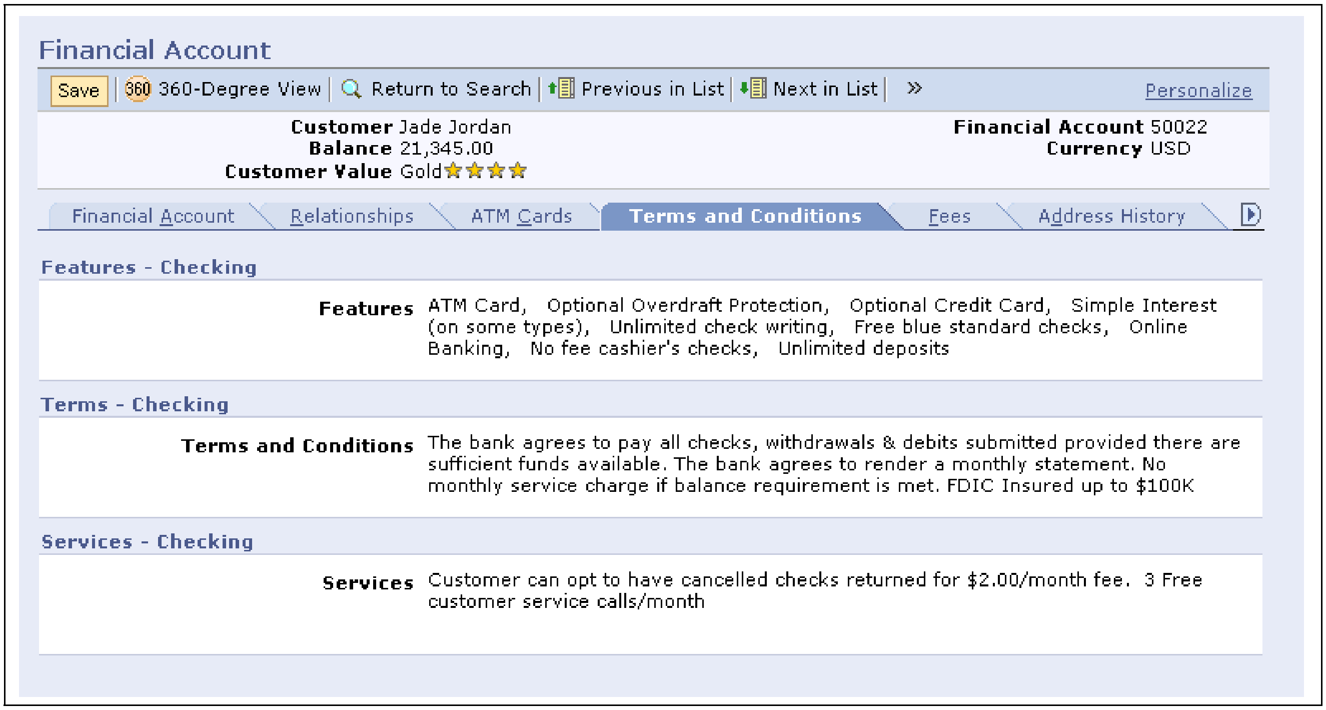
Working with ATM Cards

Access the Financial Account - ATM Cards page.

See *PeopleSoft Enterprise Banking Transactions 9 PeopleBook*, "Getting Started with PeopleSoft Enterprise Banking Transactions".

Viewing Terms and Conditions

Access the Financial Account - Terms and Conditions page.


Financial Account
Save
360-Degree View
Return to Search
Previous in List
Next in List
Personalize
Financial Account
Relationships
ATM Cards
Terms and Conditions
Fees
Address History

Customer Jade Jordan
Balance 21,345.00
Customer Value Gold★★★★
Financial Account 50022
Currency USD

Features - Checking

Features ATM Card, Optional Overdraft Protection, Optional Credit Card, Simple Interest (on some types), Unlimited check writing, Free blue standard checks, Online Banking, No fee cashier's checks, Unlimited deposits

Terms - Checking

Terms and Conditions The bank agrees to pay all checks, withdrawals & debits submitted provided there are sufficient funds available. The bank agrees to render a monthly statement. No monthly service charge if balance requirement is met. FDIC Insured up to $100K

Services - Checking

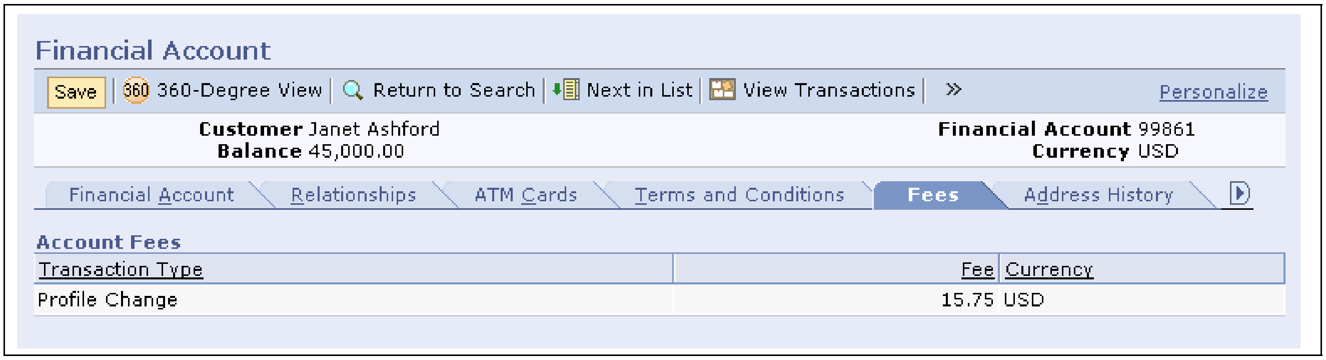
Services Customer can opt to have cancelled checks returned for $2.00/month fee. 3 Free customer service calls/month

Financial Account - Terms and Conditions page

Displays the services and features that are included in the contract, and on what terms and conditions.

Viewing Fees

Access the Financial Account - Fees page.


Financial Account
Save
360-Degree View
Return to Search
Next in List
View Transactions
Personalize
Financial Account
Relationships
ATM Cards
Terms and Conditions
Fees
Address History

Customer Janet Ashford
Balance 45,000.00
Financial Account 99861
Currency USD

Account Fees

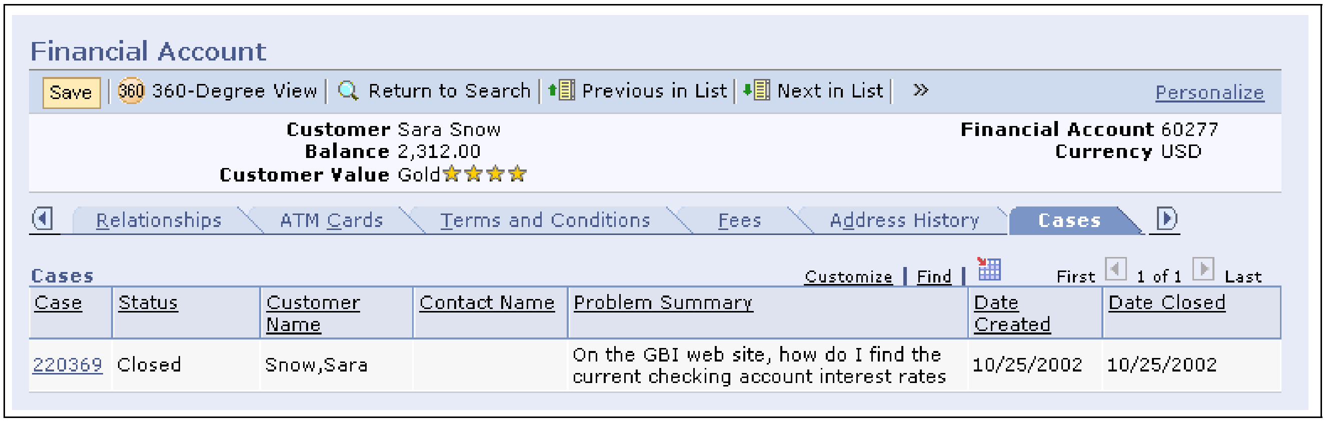
Transaction Type	Fee	Currency
Profile Change	15.75	USD

Financial Account - Fees page

The Fees page lists the Transaction Type that was performed on the account, and the cost of doing so.

Working with Cases

Access the Financial Account - Cases page.


Financial Account
Save
360-Degree View
Return to Search
Previous in List
Next in List
Personalize
Relationships
ATM Cards
Terms and Conditions
Fees
Address History
Cases
Customize | Find |
First 1 of 1 Last

Customer Sara Snow
Balance 2,312.00
Customer Value Gold★★★★
Financial Account 60277
Currency USD

Cases

Case	Status	Customer Name	Contact Name	Problem Summary	Date Created	Date Closed
220369	Closed	Snow,Sara		On the GBI web site, how do I find the current checking account interest rates	10/25/2002	10/25/2002

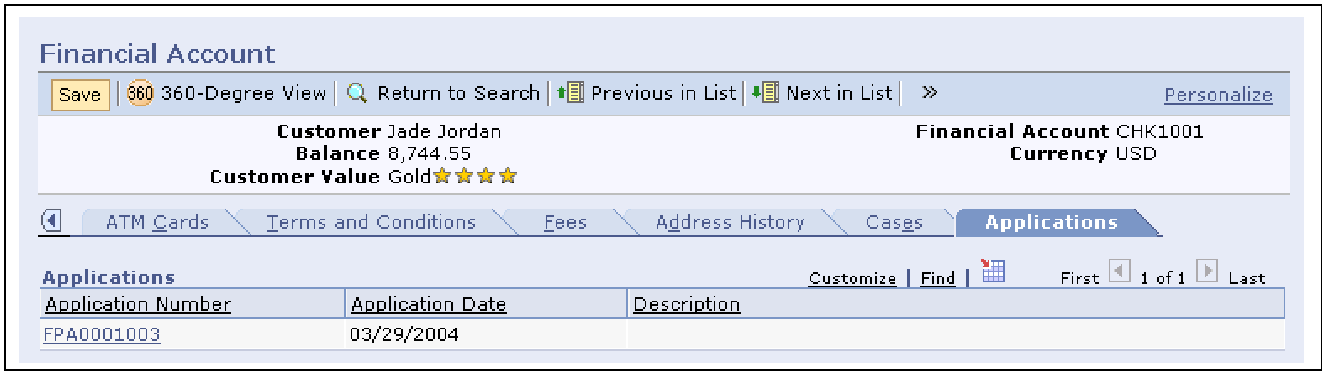
Financial Account - Cases page

The Cases page provides a summary of all cases associated with the account. To access the Case page and case details, select a specific case.

See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Managing Cases".

Working with Applications

Access the Financial Account - Applications page.


Financial Account
Save
360-Degree View
Return to Search
Previous in List
Next in List
Personalize
ATM Cards
Terms and Conditions
Fees
Address History
Cases
Applications
Customize | Find
First 1 of 1 Last

Customer Jade Jordan
Balance 8,744.55
Customer Value Gold★★★★

Financial Account CHK1001
Currency USD

Applications

Application Number	Application Date	Description
FPA0001003	03/29/2004	

Financial Account - Applications page

To view a product application, select an application number from the Applications column.

See *PeopleSoft Enterprise Banking Transactions 9 PeopleBook*, "Getting Started with PeopleSoft Enterprise Banking Transactions" and *PeopleSoft Enterprise Policy and Claims Presentment 9 PeopleBook*, "Getting Started with PeopleSoft Enterprise Policy and Claims Presentment".

Modifying Financial Accounts

This section provides an overview of account modification and discusses:

- Modifying account fees.
- Modifying account relationships.
- Modifying credit card parameters
- Modifying currency.
- Modifying product.
- Modifying status.
- Modifying TIN type and number.

Understanding Account Modifications

PeopleSoft CRM delivers account modification functionality for financial services organization. These account features can be modified:

- Account fee
- Account relationships
- Credit card parameters
- Currency
- Product
- Status.
- TIN type and number.

Each account modification request creates an case with the type of *Modify Account.* A business project is instantiated and associated with the case. The agent works through the phases and tasks in the business project and can close the case after the business project is closed. At the end of the business project a message is published to the legacy system reporting the changes requested. After the legacy system completes the modification request , then the system send a new and separate account creation message to reflect the changes in the CRM system.

Common Elements Used in this Section

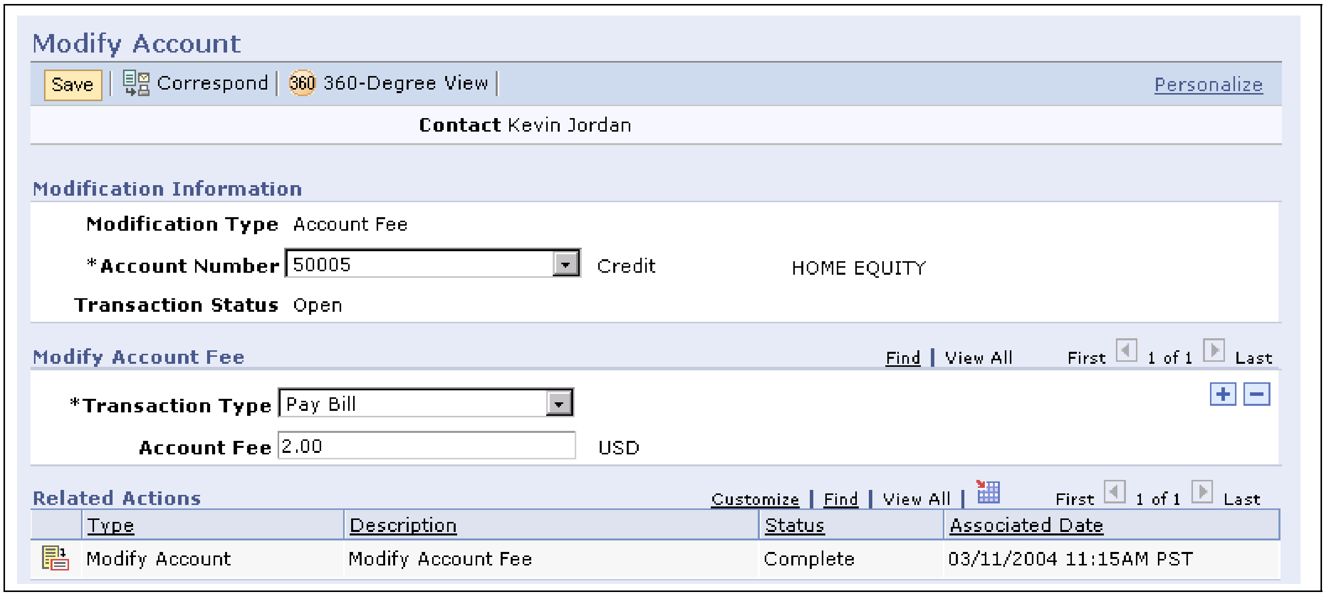
Modification Type	Displays the modification type you chose to access the page.
Account Number	Select the account that is to be modified.
Transaction Status	Status of the transaction will be *Open* until the business project is complete. When the actual modification has taken place and the message is received from the legacy system, the transaction status is changed to *Closed*.

Pages Used to Modify Accounts

Page Name	Object Name	Navigation	Usage
Modify Account	RBF_MODIF_ACCT	Customer Accounts, Modify Account, Modify Financial Account	Select the change to be made to the account. The system displays a unique page for each account modification type.
Modify Account - Account Fee	RBF_MODIF_ACCT	On the Modify Financial Account page, select the Account Fee modification type	Use this page to change the account fee on a specific account for a particular type of transaction.
Modify Account - Account Relationships	RBF_MODIF_ACCT	On the Modify Financial Account page, select the Account Relationships modification type	Use this page to change the relationship on an account.
Modify Account - Credit Card Parameters	RBF_MODIF_ACCT	On the Modify Financial Account page, select the Credit Card Parameters modification type	Use this page to change the limits on a credit card.
Modify Account - Currency	RBF_MODIF_ACCT	On the Modify Financial Account page, select the Currency modification type	Use this page to change the base currency of an account.
Modify Account - Product	RBF_MODIF_ACCT	On the Modify Financial Account page, select the Product modification type	Use this page to replace the current account product with a new product.
Modify Account - Status	RBF_MODIF_ACCT	On the Modify Financial Account page, select the Status modification type	Use this page to change the status of the account.
Modify Account - TIN Type and Number	RBF_MODIF_ACCT	On the Modify Financial Account page, select the TIN Type and Number modification type	Use this page to change the TIN type or number.
Reverse Transaction Fee	RBF_FEE_REVERSAL	On the 360-Degree View page, select *Reverse Transaction Fee* from the Go To drop-down list box. Click Go.	Use this page to reverse transaction fees that have been charged and paid.

Modifying Account Fees

Access the Modify Account: Account Fee page.


Save
Correspond
360-Degree View
Personalize
Find | View All
First 1 of 1 Last
Customize | Find | View All |

Modify Account

Contact Kevin Jordan

Modification Information

Modification Type Account Fee

***Account Number** 50005 Credit HOME EQUITY

Transaction Status Open

Modify Account Fee

***Transaction Type** Pay Bill

Account Fee 2.00 USD

Related Actions

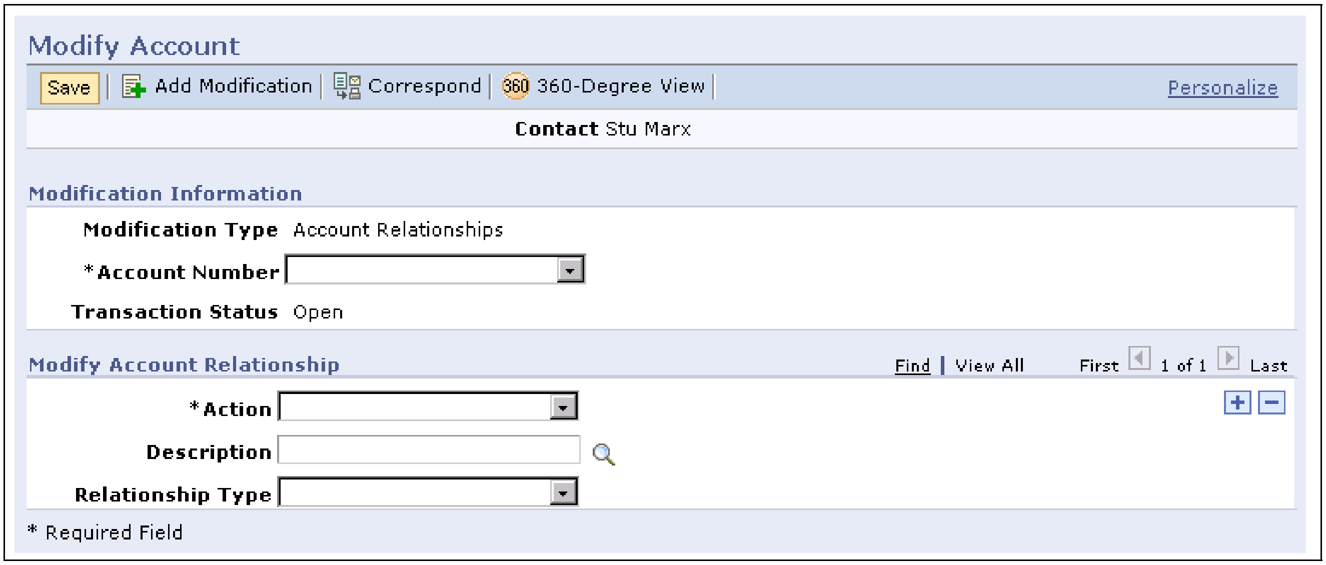
Type	Description	Status	Associated Date
Modify Account	Modify Account Fee	Complete	03/11/2004 11:15AM PST

Modify Account: Account Fee page

Transaction Type	Select the type of transaction to be modified.
Account Fee	Enter the new account fee.

Modifying Account Relationships

Access the Modify Account: Account Relationships page.


Save
Add Modification
Correspond
360-Degree View
Personalize
Find | View All
First 1 of 1 Last

Modify Account

Contact Stu Marx

Modification Information

Modification Type Account Relationships

***Account Number**

Transaction Status Open

Modify Account Relationship

***Action**

Description

Relationship Type

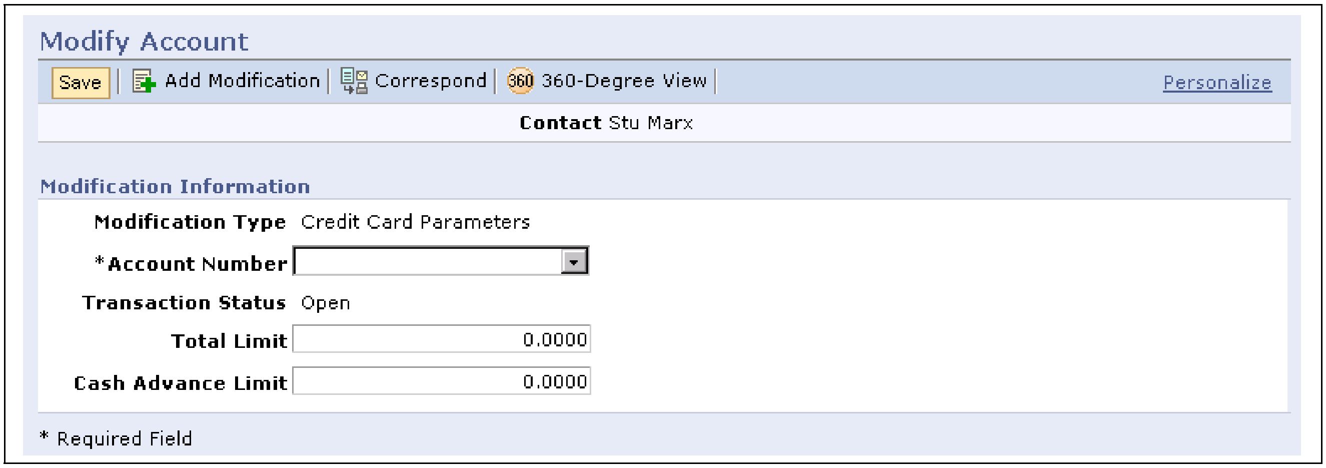
* Required Field

Modify Account: Account Relationships page

Action	Select *Add* or *Delete* to change the account relationship.
Customer	Select the name of the customer to be added to or deleted from the relationship.
Relationship Type	Select the type of relationship that is being modified. Relationship types are established in the Customer Data Model component.

Modifying Credit Card Parameters

Access the Modify Account: Credit Card Parameters page.



Modify Account
Save
Add Modification
Correspond
360-Degree View
Personalize

Contact Stu Marx

Modification Information

Modification Type Credit Card Parameters

***Account Number**

Transaction Status Open

Total Limit 0.0000

Cash Advance Limit 0.0000

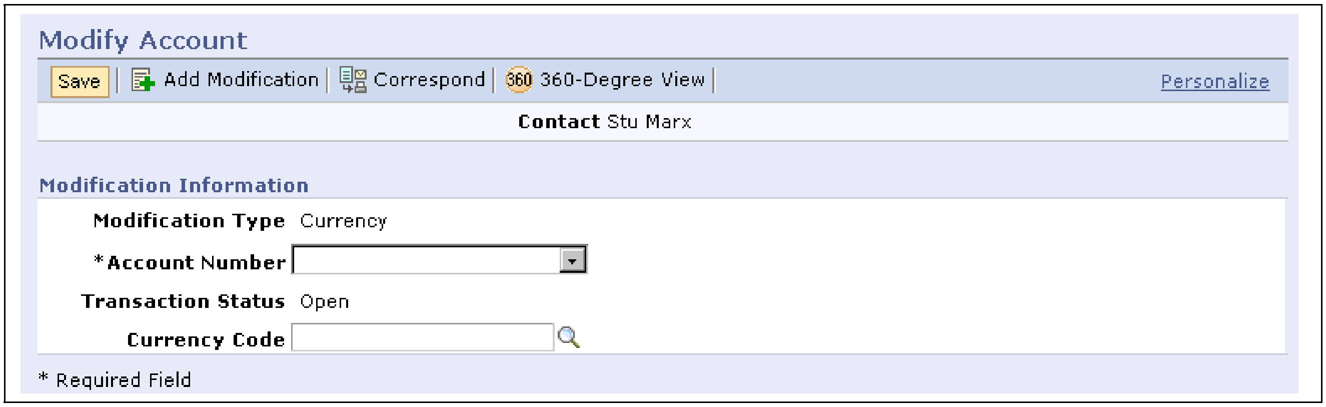
* Required Field

Modify Account: Credit Card Parameters page

Total Limit	Enter the new total chargeable limit on the credit card.
Cash Advance Limit	Enter the new total cash advance limit that is available on the credit card.

Modifying the Currency

Access the Modify Account: Currency page.



Modify Account
Save
Add Modification
Correspond
360-Degree View
Personalize

Contact Stu Marx

Modification Information

Modification Type Currency

***Account Number**

Transaction Status Open

Currency Code

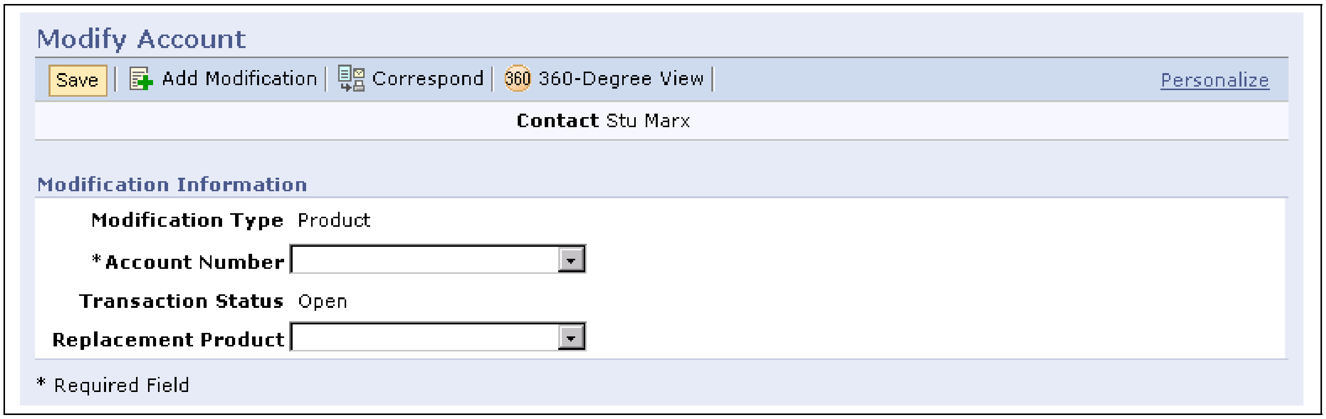
* Required Field

Modify Account: Currency page

Currency Code	Enter the new base currency code for the account. Each account must be changed independently.

Modifying the Product

Access the Modify Account: Product page.


Modify Account
Save
Add Modification
Correspond
360-Degree View
Personalize

Contact Stu Marx

Modification Information

Modification Type Product

***Account Number**

Transaction Status Open

Replacement Product

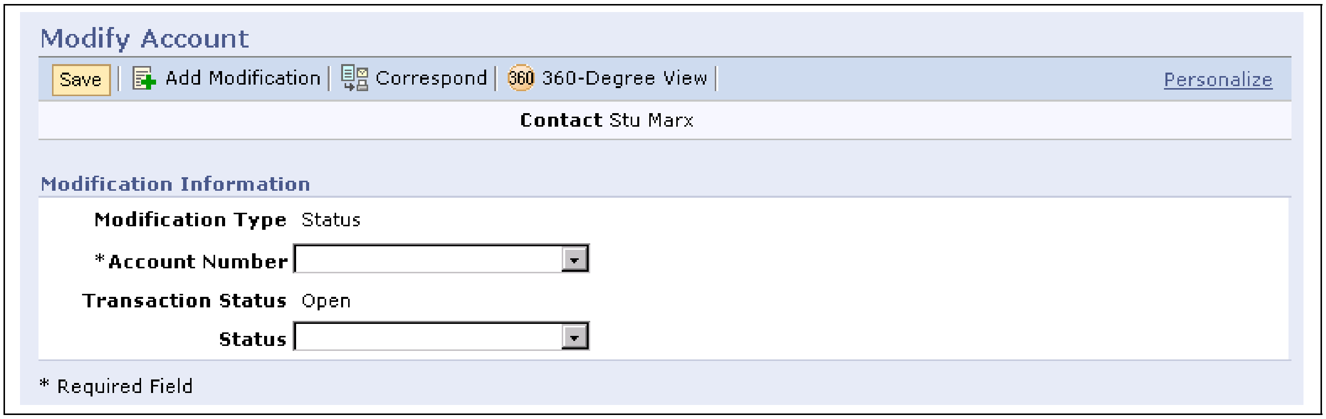
* Required Field

Modify Account: Product page

Replacement Product Select a replacement product for the current account. Options of the replacement product appear by default from the Product Relationship component.

Modifying the Status

Access the Modify Account: Status page.


Modify Account
Save
Add Modification
Correspond
360-Degree View
Personalize

Contact Stu Marx

Modification Information

Modification Type Status

***Account Number**

Transaction Status Open

Status

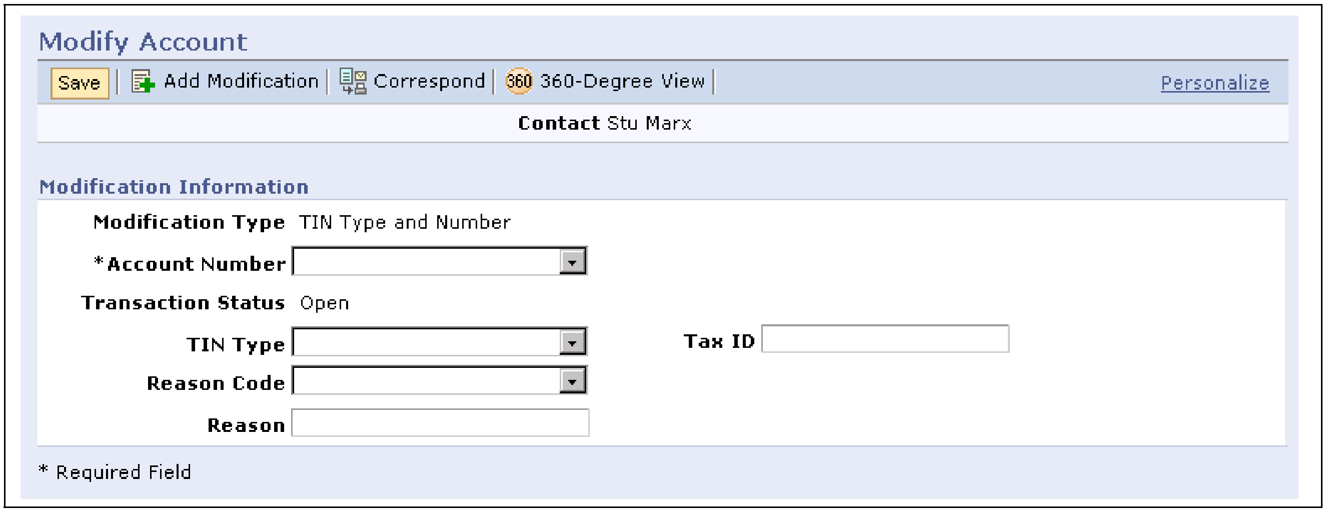
* Required Field

Modify Account: Status page

Status Select the status of the account. Delivered values are *Closed, Hold, Inactive, Open, Pending Close,* and *Pending Open.*

Modifying the TIN Type and Number

Access the Modify Account: TIN Type and Number page.


Modify Account
Save
Add Modification
Correspond
360-Degree View
Personalize

Contact Stu Marx

Modification Information

Modification Type TIN Type and Number

***Account Number**

Transaction Status Open

TIN Type

Tax ID

Reason Code

Reason

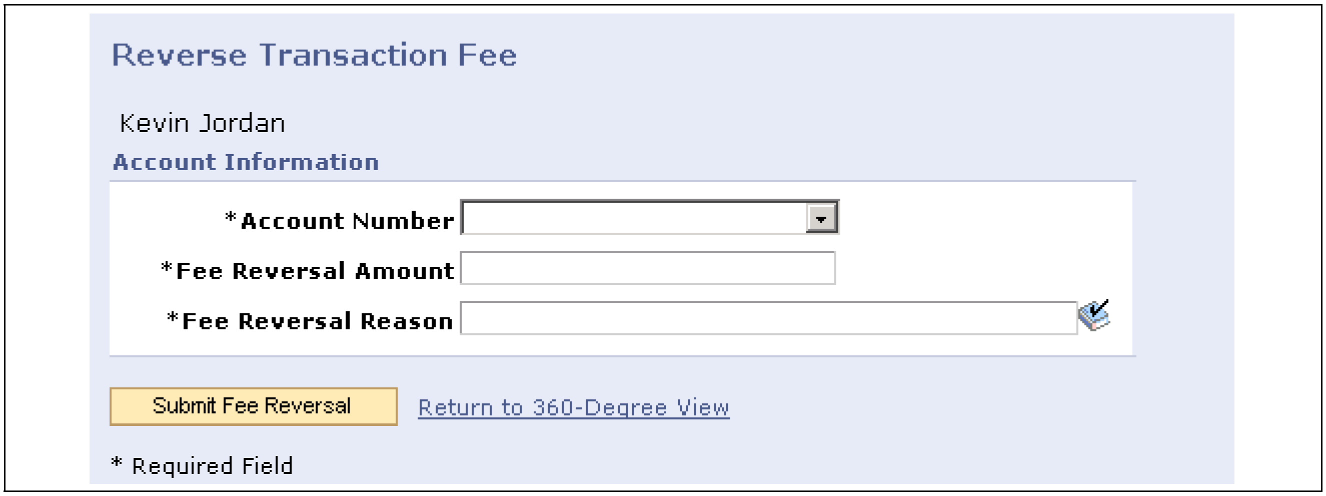
* Required Field

Modify Account: TIN Type and Number page

TIN Type	Select the new TIN type.
Tax ID	Enter the new tax ID.
Reason Code	Select a reason code for the change.
Reason	Enter a reason for the change.

Reversing Transaction Fees

Access the Reverse Transaction Fee page.


Reverse Transaction Fee

Kevin Jordan

Account Information

***Account Number**

***Fee Reversal Amount**

***Fee Reversal Reason**

Submit Fee Reversal
Return to 360-Degree View

* Required Field

Reverse Transaction Fee page

The agent can use the Reverse Transaction Fee page to reverse out fees that have already been charged and paid. All fields on this page are required.

CHAPTER 17

Understanding Case Management for Industries

This chapter discusses:

- Case management for financial services.
- Case management for insurance.
- Case management for communications.
- Case management for energy.
- Case management for government.
- Core functionality.

Case Management for Financial Services

The case and solution functionality for the financial services solution is based on the case and solution functionality found in the PeopleSoft Call Center applications.

Some functionality has been configured for financial services business needs, including.

- Financial services case types.
- Billing Account and Financial Account searches.

Case Types

PeopleSoft provides the following case types specifically for the financial services industries:

- Add/Modify ATM Card
- Close Account
- Complaint
- Fulfillment Request
- Pick-up / Drop-off
- Question/Problem
- Service Request

Case Management for Insurance

The case and solution functionality for the insurance industry solution is based on the case and solution functionality found in the PeopleSoft Call Center applications.

Some functionality has been configured for insurance business needs, including.

- Insurance industry case types.
- Billing Account and Financial Account searches.

Case Types

PeopleSoft provides the following case types specifically for the insurance industry:

- Claim Request
- Close Account
- Complaint
- Fulfillment Request
- Pick-up / Drop-off
- Question/Problem
- Service Request

Case Management for Communications

The case and solution functionality for the communications industry solution is based on the case and solution functionality found in the PeopleSoft Call Center applications.

Some functionality has been configured for communications industry business needs, including.

- Communications industry case types.
- Account Number and Service Phone Number searches.

Case Types

PeopleSoft provides the following case types specifically for the communications industry:

- Administrative Quest
- Bill Dispute
- Complaint
- Fraud
- Literature
- Product Defect
- Question or Problem

- Service Request

Case Management for Energy

The case and solution functionality for the energy industry solution is based on the case and solution functionality found in the PeopleSoft Call Center applications.

Some functionality has been configured for energy industry business needs, including.

- Energy industry case types.
- Site-specific searches.

  These searches include *Site Address*, *Site City*, *Site Country*, *Site State*, and *Site Postal*.

Case Types

PeopleSoft provides the following case types specifically for the energy industry:

- Complaint
- Power Outage
- Bill Dispute
- Question
- Service Request

Case Management for Government

The case and solution functionality for the government solution is based on the case and solution functionality found in the PeopleSoft Call Center applications.

Some functionality has been configured for government business needs, including.

- Government case types.
- Anonymous callers.

  An anonymous caller is a person who does not provide a name when opening a case. An anonymous caller can be a guest user (a person not registered in the database) who reports an incident, or a registered user who does not have any personal data attached to the case. For an anonymous caller, no personal information is required before saving the case, and no personal information is saved in the database.

  Note. The anonymous caller can be used by any display template. It is enabled for government when delivered.

- Incident location.

You can identify the location of an incident using an explicit street address or an intersection. If you use ESRI integration for mapping functionality, the system sends the address or intersection information to the ESRI system, which returns the latitude and longitude for the incident location. This enables you to view the location of the incident on the map when you click the Map Dashboard toolbar button. Incident location information is not required to save the case.

Note. The incident location can be used by any display template. It is enabled for government when delivered.

Case Types

PeopleSoft provides the following case types specifically for government:

- Administrative Quest
- Biz Development
- Complaint
- Employment
- Events
- Legal Notice
- Literature Request
- Outside Jurisdiction
- Permit / Renewal
- Question
- Report Problem
- Report Tip
- Service Request
- Suggestion

Core Functionality

The case functionality for all industry solutions is built on core CRM Call Center functionality. It is highly recommended that you review the following references before working with case management.

Process	Details	More Information
Define call center business units	• Call Center business units. • Table set controls. • Defaults for industry solutions.	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Defining Call Center Business Units and Display Template Options”.

Process	Details	More Information
Set up call center prompt tables	• Case status. • Case type. • Impact • Priority. • Severity. • Source. • Category/Type/Detail • Specialty types and Details. • Problem Type • Quick Code.	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Setting Up Call Center Prompt Tables".
Manage cases	• Case access. • Case creation. • Case retrieval. • Saved searches. • Case management activities.	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Managing Cases".
Process Cases	• Search for solutions • View the Case Summary page. • Add notes and attachments. • Manage related cases • Manage related actions. • Manage interested parties. • Record billing information. • Manage attributes	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Processing Cases".

CHAPTER 18

Working with Self Service Transactions for Insurance

This chapter provides an overview of self-service for the insurance industry and discusses how to:

- Work with PeopleSoft Customer Care transactions.
- Change policies.
- Browse catalogs to order products.
- Search for locations.
- Manage user profiles.
- Report a First Notice of Loss (FNOL).
- View claims.

Understanding Self-Service Transactions for Insurance

This section lists prerequisites and discusses:

- Self-service view.
- Self-service access.

Prerequisites

Much of the self-service functionality for insurance is based on core functionality for case and product catalog. Detailed information on setting up and managing self-service is available in these PeopleBook chapters:

Process	Details	More Information
Setting up customer self-service	• Define guest IDs. • Set up user registration features. • Set up Contact Us features.	See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up Customer Self-Service”.

Process	Details	More Information
Working with customer self-service	• Sign in to PeopleSoft self-service. • Register as a personal user. • Maintain name and sign-in information. • Maintain a customer's contact and address information. • Maintain a customer's address book. • View internal contacts. • Send messages.	See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Working with Customer Self-Service Transactions".
Configuring self-service	• Hide specific fields in self-service Case components. • Configure Contact Me notifications. • Associate solutions with reasons that self-service users provide for closing cases. • Update descriptions of the predefined searches that the users of Self Service components use. • Set up FAQs and troubleshooting guides.	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Configuring Self-Service Applications".
Working with self-service transactions	• Create a case. • Manage existing cases. • Search for solutions. • Use FAQs and troubleshooting guides.	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Working with Self-Service Application Transactions".

Self Service Management

The self-service menu enables the self-service user to perform these transactions:

Menu Item	Description
Customer Care	Create cases, view cases, search solutions, search frequently asked questions (FAQs), and view the troubleshooting guide.
Policy Administration	Modify policies.

Menu Item	Description
Browse Catalog	View product catalogs, view information about product offerings, and request quotes online.
Search for Location	Find locations for specific products or services.
Profile	Change the username, password, default address, phone number, and email address; view and maintain an address book; and view internal contact information.
Customer Selection	Select the role for the current transaction.
Contact Us	Create an email that will be directed to the appropriate area in your organization.

Self Service Access

Two types of self-service users can access your site:

- Guest users.
- Registered users.

Guest User Access

When users first access the site, they are automatically logged in using the INSGUEST ID that is identified in your configuration properties file. As long as that ID has the appropriate permissions, users can use the site with limited access.

Then, users can sign in with their own user ID and password to further identify themselves and get additional access. For example, a user who accesses the site as a guest can access the product catalog but cannot view order statuses. Once the user signs in, both the product catalog and order statuses are accessible. Even after users sign in with their own user IDs, the guest ID controls certain site characteristics, such as the site language.

If you have more than one guest ID, users can switch to a different one by selecting a value from the drop-down list box on the page. Depending on how you define guest IDs, the IDs may control the site language, the business unit whose data is displayed, or other site characteristics.

Registered User Access

Visitors can register as personal users by clicking the Personal User Registration link and establishing a personal user ID. This prompts the system to create a consumer record for that person, and the registration causes the system to create a user ID that is associated with the new consumer record and that the visitor can use to sign in on subsequent visits to the site. The user ID is cloned from the guest ID that was active when the user registered. Menu navigation options and, in some cases, page appearance depend on the user’s role or roles.

Users who forget their passwords can click the Password Hint link to request a new password.

Working with PeopleSoft Customer Care Transactions

This section lists the pages that consumers use to work with customer care transactions.

See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Working with Self-Service Application Transactions,” Accessing Self-Service Transactions In PeopleSoft CRM and HRMS; *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Working with Self-Service Application Transactions,” Managing Existing Self-Service Application Cases; *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Working with Self-Service Application Transactions,” Searching for Solutions; *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Working with Self-Service Application Transactions,” Accessing FAQs and *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Working with Self-Service Application Transactions,” Selecting and Running Troubleshooting Guides.

Pages Used to Work with PeopleSoft Customer Care Transactions

Page Name	Object Name	Navigation	Usage
Customer Care	RBF_MNU_CARE	Customer Care	Access PeopleSoft Customer Care transactions and case functionality.
Create Case	RCFCASE_SW_SS_RPT	On the Customer Care page, click the Create a New Case link	Create new Cases to file complaints, request information, and so on.
Search Cases	RCFCASE_SW_SS_SRCH	On the Customer Care page, click the Search Cases link	Search for cases that they created, view case information, view a complete description of the problem, view solutions that are associated with the case, and resume product applications that have been saved for later.
Search Solutions	RC_SOLNSRCH_SW_SS	On the Customer Care page, click the Search Solutions link	Search for solutions to cases.
FAQ (Frequently Asked Questions)	RBT_FAQ_SOL_SS	On the Customer Care page, click the FAQ link	Search FAQs for a topic.
Troubleshooting Guide	RBT_TGUIDE_SS	On the Customer Care page, click the Troubleshooting Guide link	Access the troubleshooting guide for solutions.

Changing Policies

This section lists the pages that consumers use to make policy changes online.

Pages Used to Change Policies

Page Name	Object Name	Navigation	Usage
Policy Administration	RBI_MNU_POLICY	Click the Policy Administration link on the main menu	Access the Change Policy component.
Change Policy	RBI_CHG_POLICY_SS	Click the Change Policy link on the Policy Administration page	Change policies.

Ordering Products Online

This section lists the pages that consumers use to order products online.

See Also

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook, "Creating Catalogs"

Pages Used to Browse Catalogs to Order Product

Page Name	Object Name	Navigation	Usage
Browse the Catalog	RB_CATALOG	Click the Browse Catalog link on the main menu	View the available catalogs.
Product Display	RB_CATALOG	Click a product catalog link on the Browse the Catalog page	View the products that are available in the selected catalog.
Product Comparison	RB_CATALOG	Select up to three products on the Product Display page. Click Add Selected to Compare Pad	Compare up to three products side by side. The system displays detailed descriptions for comparison purposes. You can choose to get a quote from this page.
Product Details	RBF_APPLY_SA_PG	Click the Purchase this Product link on the Product Comparison page Click the product name on the Product Comparison page	View the selected product's features, terms, and conditions. You can choose to get a quote from this page.

Searching for Locations

This section list the page that consumers use to search for locations where specific products or services are available.

Page Used to Search for Locations

Page Name	Object Name	Navigation	Usage
Search for Location	RBF_SITE_SRCH_SS	Click the Search for Location link on the main menu	Search for locations that offer specific products or services.

Managing User Profiles

The section lists the pages that consumers use to manage user profiles.

Pages Used to Manage User Profiles

Page Name	Object Name	Navigation	Usage
Profile	RX_PROFILE	Click the Profile link on the main menu	Access the user profile menu.
Name and Sign In	RX_NAME_SIGNIN	Click the Name and Sign In link on the Profile menu	Modify name and sign-in information.
Default Addresses	RX_PROFILE_DFLTS	Click the Default Addresses link on the Profile menu	View and modify default addresses.
Address Book	RX_ADR_CONSUMER	Click the Address Book link on the Profile menu.	Maintain address books.
Contact Directory	WC_CONTACT_DIR	Click the Internal Contacts link on the Profile menu	Maintain directories of internal contacts.

Reporting an FNOL

The section lists the pages that consumers use to file a FNOL.

See Also

Chapter 4, “Setting Up Industry-Specific Functionality,” Setting Up Online Application Forms for FNOL, page 25

Chapter 7, “Understanding the 360-Degree View for Industries,” Transactions for the Insurance Industry, page 71

Pages Used to Report a FNOL

Page Name	Object Name	Navigation	Usage
Financial Account	RBF_FIN_ACCOUNT_SS	Click the policy number link on the My Policy pagelet	Review policy details.
Insurance Policy	RBI_POLICY_SS	Click the View Policy button on the Financial Account page	Review covered assets, coverages, deductibles, limits, and options for the selected policy.

Viewing Claims

The section lists the page that consumers use to view claim details.

Page Used to View Claims

Page Name	Object Name	Navigation	Usage
Review Claim	RBI_CLAIMHDR_SS_PG	Click the claim number on the Home page	Review claim details and access the case that is associated with the claim.

CHAPTER 19

Working with Self-Service Transactions for Financial Services

This chapter provides an overview of self-service transactions available for financial services and discusses how to:

- Work with Customer Care transactions.
- Administer accounts.
- Perform banking transactions.
- Search for locations.
- Manage user profile information.
- Select customers.

Understanding Self-Service Transactions for Financial Services

The financial services solution enables you to deploy self-service administrative and financial transactions for your customers. These transactions provide access to personal account information and employ a simple interface that is suited to the casual, untrained user.

This section lists prerequisites and discusses:

- Self-service view.
- Self-service data access.
- Confirmation pages.

Prerequisites

Much of the self-service functionality for financial services is based on core functionality for cases. Detailed information on setting up and managing self-service is available in the following PeopleBook chapters:

Process	Details	More Information
Setting Up Customer Self-Service	• Define guest IDs. • Set up user registration features. • Set up Contact Us features.	See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up Customer Self-Service”.
Working with Customer Self-Service	• Sign in to PeopleSoft self-service. • Register as a personal user. • Maintain name and sign in information. • Maintain a customer’s contact and address information. • Maintain a customer’s address book. • View internal contacts. • Send messages.	See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Customer Self-Service Transactions”.
Configuring Self-Service	• Hide specific fields in self-service Case components. • Configure “Contact Me…” notifications. • Associate solutions with reasons that self-service users provide for closing cases. • Update descriptions of the predefined searches that are used by the users of self-service components. • Set up FAQs and troubleshooting guides.	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Configuring Self-Service Applications”.
Working with Self-Service Transactions	• Create a case. • Manage existing cases. • Search for solutions. • Use FAQs and troubleshooting guides.	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Working with Self-Service Application Transactions”.

Self-Service View

The self-service menu enables the following transactions:

Menu Item	Description
Customer Care	Enables users to create new Cases, search Cases, search solutions, search frequently asked questions, and view the troubleshooting guide.
Account Administration	Enables users to change the account address or the account nickname.
Browse Catalog	Enables users to view information about product offerings and apply for products online.
Banking Transactions	Enables users to set up automatic funds transfers, initiate one-time funds transfers, reorder checkbooks, stop check payments, pay bills, order copies of checks or account statements, order foreign currency, order cashier's checks, and order traveler's checks.
Search for Locations	Enables users to search for service locations using specific search criteria.
Profile	Enables users to change the user name, password, default address, phone number, or email address, and to view and maintain an address book.
Customer Selection	Enables users to select roles for transactions.
Contact Us	Enables users to create emails that are directed to the appropriate area in the financial institution.

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, "Configuring Self-Service Applications"

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, "Working with Self-Service Application Transactions"

Self-Service Data Access

The customer view displays all data applicable to the customer in all roles.

Before users can perform financial transactions, they have to select the role they are using for the transaction. Only data and processes applicable to that role are available.

Pages are available to financial services employees through the 360-Degree View.

Confirmation Pages

When self-service users perform transactions, the system provides a two-step confirmation to assure the user that the transaction was successful.

The user is asked to confirm the request. This provides the opportunity to view the request and to make changes if required.

At this point, the transaction can be canceled, and no changes will take place:

When the user confirms the transaction, the system displays a transaction confirmation with a confirmation number:

Working with Customer Care Transactions

This section lists the pages that consumers use to work with customer care transactions.

See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Working with Self-Service Application Transactions,” Understanding Self-Service Transactions; *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Working with Self-Service Application Transactions,” Searching for Solutions; *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Working with Self-Service Application Transactions,” Managing Existing Self-Service Application Cases and *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Working with Self-Service Application Transactions,” Selecting and Running Troubleshooting Guides.

Pages Used to Work with Customer Care Transactions

Page Name	Object Name	Navigation	Usage
Customer Care	RBF_MNU_CARE	Customer Care	Access Customer Care transactions.
Create Case	RCFCASE_SW_SS_RPT	On the Customer Care page, click the Create a New Case link	Create new cases to file complaints, request information, and so on.
Search Cases	RCFCASE_SW_SS_SRCH	On the Customer Care page, click the Search Cases link	Search for cases, view case information, view a complete description of the problem, and view solutions associated with the case.
Search Solutions	RC_SOLNSRCH_SW_SS	On the Customer Care page, click the Search Solutions link	Search for solutions to cases.
FAQ (Frequently Asked Questions)	RBT_FAQ_PG_SS	On the Customer Care page, click the FAQ link	Search FAQs for a topic.
Troubleshooting Guide	RBT_TGUIDE_SS	On the Customer Care page, click the Troubleshooting Guide link	Access the troubleshooting guide for solutions.

Administering Accounts

This section lists the pages that consumers use to administer their accounts.

Pages Used to Administer Accounts

Page Name	Object Name	Navigation	Usage
Account Administration	RBF_MNU_ACCT	Account Administration	Select a self-service transaction.
Change Account Address	RBF_ACT_ADR_SS	Click the Change Account Address link on the Account Administration page	Change the address for accounts.
Change Account Nickname	RBF_ACCT_NICK_SS	Click the Change Account Nickname link on the Account Administration page	Change the nickname for accounts.

Performing Banking Transactions

This section lists the pages consumers use to perform banking transactions.

Pages Used to Perform Banking Transactions

Page Name	Object Name	Navigation	Usage
Banking Transactions	RBF_MNU_BANK	Banking Transactions	Select a self-service banking transaction.
Automatic Funds Transfer	RBF_AFND_TR_SS	Click the Automatic Funds Transfer link on the Banking Transactions page	Perform a recurring transfer of funds from one account to another. The currency is that of the sending (from) account.
Transfer Funds	RBF_TRN_FND_SS	Click the Transfer Funds link on the Banking Transactions page	Perform a one-time transfer of funds from one account to another. The currency is that of the sending (from) account.
Reorder Checkbook	RBF_REO_CHK_SS	Click the Reorder Checkbook link on the Banking Transactions page	Order new checks.
Stop Check Payment	RBF_STP_PAY_SS	Click the Stop Check Payment link on the Banking Transactions page	Stop payment on a specific check.
Bill Payment	RBF_PAYEE_DISP_SS	Click the Bill Payment link on the Banking Transactions page	Pay bills.
Order Copy of Check	RBF_ORD_CHK_SS	Click the Order Copy of Check link on the Banking Transactions page	Order a copy of a check that has been issued.
Order Copy of Statement	RBF_ORD_DOC_SS	Click the Order Copy of Statement link on the Banking Transactions page	Order a copy of the account statement.
Order Foreign Currency	RBF_ORD_FCUR_SS	Click the Order Foreign Currency link on the Banking Transactions page	Order foreign currency.
Order Cashier’s Check	RBF_ORD_CCHK_SS	Click the Order Cashier’s Check link on the Banking Transactions page	Order cashier’s checks.
Order Traveler’s Checks	RBF_ORD_TCHK_SS	Click the Order Traveler’s Checks link on the Banking Transactions page	Order traveler’s checks.

Searching for Locations

This section lists the page consumers use to search for locations.

See Also

Chapter 6, "Setting Up Sites and Service Locations," page 53

Page Used to Search for Locations

Page Name	Object Name	Navigation	Usage
Search for Location	RBF_SITE_SRCH_SS	Click the Search for Location link on the Main Menu	Search for locations offering specific products or services.

Managing User Profile Information

This section lists the pages consumers use to access user profile information.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up Customer Self-Service" and *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Working with Customer Self-Service Transactions".

Pages Used to Manage User Profile Information

Page Name	Object Name	Navigation	Usage
Profile	RX_PROFILE	Profile, Profile	Select a self-service transaction.
Name and Sign In	RX_NAME_SIGNIN	Click the Name and Sign In link on the Profile menu	Change your name or password.
Default Addresses	RX_PROFILE_DFLTS	Click the Default Addresses link on the Profile menu	Change your default address, phone number, or email address.
Address Book	RX_ADR_CONSUM_INFO	Click the Address Book link on the Profile menu	Create, delete, or edit addresses.
Internal Contacts	WC_CONTACT_DIR	Click the Internal Contacts link on the Profile menu	Create, delete, or edit internal contacts.

Selecting Customers

This section lists the page consumers use to select customers.

Page Used to Select Customers

Page Name	Object Name	Navigation	Usage
Customer Selection	CUST_SELECT	Customer Selection	Select the customer you are representing for the transaction.

CHAPTER 20

Working with Self-Service Transactions for Communications and Energy

This chapter provides an overview of self-service transactions available for communications and energy and discusses how to:

- Manage accounts.
- Manage bills.
- Manage services.
- Work with customer care transactions.

Understanding Self-Service Transactions for Communications and Energy

This section lists prerequisites and discusses:

- Self-service view.
- Viewing accounts

Prerequisites

Much of the self-service functionality for communications and energy is based on core functionality for order capture. Detailed information on setting up and managing self-service is available in the following PeopleBook chapters:

Process	Details	More Information
Setting Up Customer Self-Service	• Define guest IDs. • Set up user registration features. • Set up Contact Us features.	See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up Customer Self-Service”.

Process	Details	More Information
Working with Customer Self-Service	• Sign in to PeopleSoft self-service. • Register as a personal user. • Maintain name and sign in information. • Maintain a customer's contact and address information. • Maintain a customer's address book. • View internal contacts. • Send messages.	See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Working with Customer Self-Service Transactions".
Configuring Self-Service	• Hide specific fields in self-service Case components. • Configure "Contact Me…" notifications. • Associate solutions with reasons that self-service users provide for closing cases. • Update descriptions of the predefined searches that are used by the users of self-service components. • Set up FAQs and troubleshooting guides.	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Configuring Self-Service Applications".
Working with Self-Service Transactions	• Create a case. • Manage existing cases. • Search for solutions. • Use FAQs and troubleshooting guides.	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Working with Self-Service Application Transactions".

Self-Service View

The self-service menu enables the following transactions:

Menu Item	Description
Account Management	Account Administration enables the user to view accounts, bills, and services. • The user can view account status, account information, account balance, and account usage. • The user can view bill details such as bill due date and total due for existing accounts. • The user can view service details such as account number and recurring price, and make changes to the services, such as adding and removing features.
Customer Care	Customer Care enables the user to create trouble tickets, view tickets, search solutions, search Frequently Asked Questions and view the troubleshooting guide.
Browse Catalog	Products and Services enables the user to view product catalogs, view information about product offerings, and purchase products and services online.
Search Catalog	Catalog Search enables the user to perform a keyword search on product catalogs.
Shopping Cart	The Shopping Cart displays all products and services selected for purchase.
Order Status	Order Status displays details for all orders placed within a defined period of time. The number of review days is defined in Set Up CRM, Business Unit Related, Order Capture Definition.
Quote Status	Quote Status displays details for all quotes created within a defined period of time. The number of review days is defined in Set Up CRM, Business Unit Related, Order Capture Definition.
Profile	Profile enables the user to change the user name, password, default address, phone number, or email, view and maintain an address book, and view internal contact information.
Customer Selection	Customer Selection enables the user to select the role for the transaction.
Contact Us	Contact Us enables the user to create an email that will be directed to the appropriate area.
Product Registration	Product Registration enables the user to register products online. Users can register new or existing products.

Viewing Accounts

When an account is created, the following additional information is captured and preserved:

- If the account is for a consumer, the consumer's business object (BO) ID is stored in the customer BO ID.
- If the account is for a company, created by a contact of the company, the company's BO ID is stored in the Customer BO ID and the Contact's BO ID is stored in the Contact BO ID.

The accounts shown for a user are filtered by the same criteria as shown above, based on the selections in the Customer Selection option. If the current self-service user is a consumer, all the accounts belonging to that user are shown. If the current user is a contact, then only the accounts created by that user, for the company he is representing, will be shown.

The Get Balance link on the View Account Balance page sends a synchronous message to the billing system using Integration Broker, to fetch the account balance in real time. This synchronous functionality could be altered using the UNTEGRATBILL parameter, the communications configuration. There is similar functionality represented by the Get Usage link on the Account Usage display page.

Managing Accounts

This section lists the pages that consumers use to manage accounts.

Pages Used to Manage Accounts

Page Name	Object Name	Navigation	Usage
Account Management	RBT_MNU_ACCT	Account Management, Account Management	Select a self-service transaction.
View Accounts	RBT_ACCT_VIEW_SS	On the Account Management page, click the View Accounts link	Self-service users search for accounts to view in greater detail.
Account Details	RBT_ACCOUNT_SS	On the View Accounts page, click the account number	Self-service users view details of individual accounts. Details include account number, account type, account name, and account status.
View Account Balance,	RBT_ACCT_BAL_SS	On the Account Details page, click the View Account Balance link	Self-service users view the current balance and opening balance of the account.
Bill Dispute	RBT_BILL_DISP_SS	On the View Account Balance page, click the Dispute Balance button.	Self-service users can dispute a bill appearing on the system.
View Account Usage	RBT_ACCT_USAGE_SS	On the Account Details page, click the View Account Usage link.	Self-service users view total time and current minutes used on an account.
Usage Dispute,	RBT_ACCT_USAGE_SS	On the View Account Usage page, click the Dispute Usage button.	Self-service users can dispute usage on an account.
Change Payment Type,	RBT_CHNGPAY_PG_SS	On the Account Details page, click the Change Payment Type button	Self-service users can change the payment type for the account. Delivered selections are *Invoice, Automatic Payment* and *Credit Card.* The user can select a different payment type for each account.

Managing Bills

This section lists the pages that consumers use to manage bills.

Pages Used to Manage Bills

Page Name	Object Name	Navigation	Usage
View Bills	RBT_BILL_VIEW_SS	On the Account Management page, click the View Bills link	Self-service users select the account to view billing information.
View Bills	RBT_BILL_VIEW_SS	On the View Bills page, select the account number from the list and click Go	Self-service users view information such as bill due date and total due.
Bill Details,	RBT_BILL_PG_SS	On the View Bills page, click the Bill Number link	Self-service users review details of the bill.
Bill Item Details	RBT_BILL_ITEM_SS	On the Bill Details page, click the Bill Detail Information link	Self-service users review individual line items from the bill.
Bill Dispute	RBT_BILL_DISP_SS	On the Bill Details page, click the Bill Dispute link.	Self-service users select a reason for the billing dispute. Delivered values are *Incorrect Balance, Billing Error,* or *Others*. The self-service application user can only dispute a bill event, but a CSR can dispute a bill item.

Managing Services

This section lists the pages that consumers use to manage services.

Pages Used to Manage Services

Page Name	Object Name	Navigation	Usage
View Services	RBT_SERV_VIEW_SS	On the Account Management page, click the View Services link	Self-service users select the account to view service information.
Service Details	RBT_SERV_PG_SS	On the View Services page, click the service number	Self-service users review features and associated pricing of the service.
Modify Your Service,	RBT_MODIFY_SERV_SS	On the Service Details page, click the Change My Features button	Self-service users can add or remove features for the service.
Summary	RBT_SERVICE_MGMTSS	On the Modify Your Service page, click the Finish button	Self-service users can review the changes they made to the service and review the related pricing.

Working with Customer Care Transactions

This section lists the pages that consumers use to work with customer care transactions.

The Trouble Ticket for communications and energy is based on core Case functionality. PeopleSoft has added the Account field to the Create Case component. Core functionality is used throughout the rest of the component.

Pages Used to Work with Customer Care Transactions

Page Name	Object Name	Navigation	Usage
Customer Care	RBT_MNU_CASE	Customer Care, Customer Care	Select a self-service transaction.
Create Case	RCTCASE_SW_SS_RPT	On the Customer Care page, click Create Trouble Ticket.	Self-service users can create trouble tickets on any case.

APPENDIX A

Delivered Web Services and Service Operations

This appendix discusses the delivered web services and service operations for the financial service industries.

Delivered Web Services

This section discusses:

- The financial account web service.
- The policy web service.
- The claims web service.
- How to view the message elements.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Working with Business Processes and Web Services”

Financial Account Web Service

A web service is available with the following operations:

- Create Account

  Takes financial account data as input and creates a financial account record and associated child records in the CRM system.
- Get Account

  Returns a financial account record and its associated child record based on a passed unique identifier.
- Search Account

  Returns a list of financial account records and the associated child records based on criteria field values passed via the input message.
- Update Account

  Modifies the attributes of the financial account data structure.
- Change Account Address

  Takes the account number and new address data as input and changes the address in the CRM system for that account.

This table provides the technical names, operation type, and messages names of the service operations that are related to the web services:

Service Operation	Operation Type	Request Message	Response Message
Create Account (RBF_FINACCOUNT_CREATE)	Synchronous	RBF_FINACCOUNT_CREATE_REQ	RBF_FINACCOUNT_CREATE_RES
Get Account (RBF_FINACCOUNT_GET)	Synchronous	RBF_FINACCOUNT_GET_REQ	RBF_FINACCOUNT_GET_RES
Search Account (RBF_FINACCOUNT_SEARCH)	Synchronous	RBF_FINACCOUNT_SEARCH_REQ	RBF_FINACCOUNT_SEARCH_RES
Update Account (RBF_FINACCOUNT_UPDATE)	Synchronous	RBF_FINACCOUNT_UPDATE_REQ	RBF_FINACCOUNT_UPDATE_RES
Change Account Address (RBF_FINACCOUNT_ACTADRCHG)	Synchronous	RBF_FINACCOUNT_ACTADRCHG_REQ	RBF_FINACCOUNT_ACTADRCHG_RES

Policy Web Service

A web service is available with the following operations:

- Create Policy

  Takes insurance policy data as input and creates an insurance policy record and associated child records in the CRM system.

- Get Policy

  Returns a policy record and its associated child record based on a passed unique identifier.

- Search Policy

  Returns a list of policy records and their associated child records based on criteria field values passed via the input message.

- Update Policy

  Modifies the attributes of the policy structure.

This table provides the technical names, operation type, and messages names of the service operations that are related to the web services:

Service Operation	Operation Type	Request Message	Response Message
Create Policy (RBI_POLICY_CREATE)	Synchronous	RBI_POLICY_CREATE_REQ	RBI_POLICY_CREATE_RES

Service Operation	Operation Type	Request Message	Response Message
Get Policy (RBI_POLICY_GET)	Synchronous	RBI_POLICY_GET_REQ	RBI_POLICY_GET_RES
Search Policy (RBI_POLICY_SEARCH)	Synchronous	RBI_POLICY_SEARCH_REQ	RBI_POLICY_SEARCH_RES
Update Policy (RBI_POLICY_UPDATE)	Synchronous	RBI_POLICY_UPDATE_REQ	RBI_POLICY_UPDATE_RES

Claims Web Service

A web service is available with the following operations:

- Create Claim

  Takes claim related data as input and creates a claim record and associated child records in the CRM system
- Update Claim

  Takes claim information as input and updates the claim data in the CRM system.

This table provides the technical names, operation type, and messages names of the service operations that are related to the web services:

Service Operation	Operation Type	Request Message	Response Message
Create Claim (RBI_CLAIM_CREATE)	Synchronous	RBI_CLAIM_CREATE_REQ	RBI_CLAIM_CREATE_RES
Update Claim (RBI_CLAIM_UPDATE)	Synchronous	RBI_CLAIM_UPDATE_REQ	RBI_CLAIM_UPDATE_RES

Viewing the Message Elements

You can view the elements and fields that are included in each operation message through PeopleTools.

To view a list of field names and aliases for a particular message:

1. Select PeopleTools, Integration Broker, Integration Setup, Messages.
2. Enter *RBF* or *RBI* in the Message Name field and click Search.

   The system lists all the messages that are related to financial services or insurance.
3. Select the message you want to view.
4. Click the message name link under the Parts grid.

   The system opens the Message Definition page in a new browser.
5. Click the plus sign next to the table name at the bottom of the page to view the fields and aliases associated with the message.

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

	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

	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.

	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.

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.

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

	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.

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.

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

	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.

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

	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

	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

	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.

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.

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).

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.

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.

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.

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.

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.

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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