
PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook

August 2006

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook
SKU CRM9PRD-B 0806
Copyright © 2001 - 2006, Oracle. All rights reserved.

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are “commercial computer software” or “commercial technical data” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software--Restricted Rights (June 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee’s responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Oracle, JD Edwards, PeopleSoft, and Siebel are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Open Source Disclosure

Oracle takes no responsibility for its use or distribution of any open source or shareware software or documentation and disclaims any and all liability or damages resulting from use of said software or documentation. The following open source software may be used in Oracle’s PeopleSoft products and the following disclaimers are provided.

Apache Software Foundation

This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>). Copyright © 2000-2003. The Apache Software Foundation. All rights reserved. Licensed under the Apache License, Version 2.0 (the “License”); you may not use this file except in compliance with the License. You may obtain a copy of the License at <http://www.apache.org/licenses/LICENSE-2.0>.

Unless required by applicable law or agreed to in writing, software distributed under the License is distributed on an “AS IS” BASIS, WITHOUT WARRANTIES OR CONDITIONS OF ANY KIND, either express or implied. See the License for the specific language governing permissions and limitations under the License.

OpenSSL

Copyright © 1998-2005 The OpenSSL Project. All rights reserved.

This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit (<http://www.openssl.org/>).

THIS SOFTWARE IS PROVIDED BY THE OpenSSL PROJECT “AS IS” AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE OpenSSL PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Loki Library

Copyright © 2001 by Andrei Alexandrescu. This code accompanies the book: Alexandrescu, Andrei. “Modern C++ Design: Generic Programming and Design Patterns Applied”. Copyright © 2001 Addison-Wesley. Permission to use, copy, modify, distribute and sell this software for any purpose is hereby granted without fee, provided that the above copyright notice appear in all copies and that both that copyright notice and this permission notice appear in supporting documentation.

Helma Project

Copyright © 1999-2004 Helma Project. All rights reserved. THIS SOFTWARE IS PROVIDED “AS IS” AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE HELMA PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Helma includes third party software released under different specific license terms. See the licenses directory in the Helma distribution for a list of these license.

Sarissa

Copyright © 2004 Manos Batsis.

This library is free software; you can redistribute it and/or modify it under the terms of the GNU Lesser General Public License as published by the Free Software Foundation; either version 2.1 of the License, or (at your option) any later version.

This library is distributed in the hope that it will be useful, but WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the GNU Lesser General Public License for more details.

You should have received a copy of the GNU Lesser General Public License along with this library; if not, write to the Free Software Foundation, Inc., 59 Temple Place, Suite 330, Boston, MA 02111-1307 USA.

ICU

ICU License - ICU 1.8.1 and later COPYRIGHT AND PERMISSION NOTICE Copyright © 1995-2003 International Business Machines Corporation and others. All rights reserved.

Permission is hereby granted, free of charge, to any person obtaining a copy of this software and associated documentation files (the "Software"), to deal in the Software without restriction, including without limitation the rights to use, copy, modify, merge, publish, distribute, and/or sell copies of the Software, and to permit persons to whom the Software is furnished to do so, provided that the above copyright notice(s) and this permission notice appear in all copies of the Software and that both the above copyright notice(s) and this permission notice appear in supporting documentation. THE SOFTWARE IS PROVIDED "AS IS," WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO THE WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT OF THIRD PARTY RIGHTS. IN NO EVENT SHALL THE COPYRIGHT HOLDER OR HOLDERS INCLUDED IN THIS NOTICE BE LIABLE FOR ANY CLAIM, OR ANY SPECIAL INDIRECT OR CONSEQUENTIAL DAMAGES, OR ANY DAMAGES WHATSOEVER RESULTING FROM LOSS OF USE, DATA OR PROFITS, WHETHER IN AN ACTION OF CONTRACT, NEGLIGENCE OR OTHER TORTIOUS ACTION, ARISING OUT OF OR IN CONNECTION WITH THE USE OR PERFORMANCE OF THIS SOFTWARE. Except as contained in this notice, the name of a copyright holder shall not be used in advertising or otherwise to promote the sale, use or other dealings in this Software without prior written authorization of the copyright holder.

All trademarks and registered trademarks mentioned herein are the property of their respective owners.

Sun's JAXB Implementation – JSDK 1.5 relaxngDatatype.jar 1.0 License

Copyright © 2001, Thai Open Source Software Center Ltd, Sun Microsystems. All rights reserved.

THIS SOFTWARE IS PROVIDED BY THE COPYRIGHT HOLDERS AND CONTRIBUTORS "AS IS" AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE REGENTS OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

W3C IPR SOFTWARE NOTICE

Copyright © 2000 World Wide Web Consortium, (Massachusetts Institute of Technology, Institut National de Recherche en Informatique et en Automatique, Keio University). All Rights Reserved.

Note: The original version of the W3C Software Copyright Notice and License could be found at <http://www.w3.org/Consortium/Legal/copyright-software-19980720>.

THIS SOFTWARE AND DOCUMENTATION IS PROVIDED "AS IS," AND COPYRIGHT HOLDERS MAKE NO REPRESENTATIONS OR WARRANTIES, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO, WARRANTIES OF MERCHANTABILITY OR FITNESS FOR ANY PARTICULAR PURPOSE OR THAT THE USE OF THE SOFTWARE OR DOCUMENTATION WILL NOT INFRINGE ANY THIRD PARTY PATENTS, COPYRIGHTS, TRADEMARKS OR OTHER RIGHTS. COPYRIGHT HOLDERS WILL NOT BE LIABLE FOR ANY DIRECT, INDIRECT, SPECIAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF ANY USE OF THE SOFTWARE OR DOCUMENTATION.

Contents

General Preface

About This PeopleBook	xiii
PeopleSoft Enterprise Application Prerequisites.....	xiii
Application Fundamentals.....	xiii
Documentation Updates and Printed Documentation.....	xiv
Obtaining Documentation Updates.....	xiv
Downloading and Ordering Printed Documentation.....	xiv
Additional Resources.....	xv
Typographical Conventions and Visual Cues.....	xvi
Typographical Conventions.....	xvi
Visual Cues.....	xvii
Country, Region, and Industry Identifiers.....	xvii
Currency Codes.....	xviii
Comments and Suggestions.....	xviii
Common Elements Used in PeopleBooks.....	xviii

Preface

PeopleSoft Enterprise CRM Product and Item Management Preface.....	xxi
Additional Resources.....	xxi
PeopleSoft Enterprise CRM Application Fundamentals.....	xxii
PeopleSoft Enterprise CRM Business Object Management.....	xxiii
PeopleSoft CRM Enterprise Automation and Configuration Tools.....	xxiii
PeopleSoft Enterprise CRM Services Foundation.....	xxiv
PeopleTools PeopleBooks.....	xxv

Part 1 Getting Started

Chapter 1

Getting Started with PeopleSoft Enterprise CRM Product and Item Management.....	3
PeopleSoft CRM Product and Item Management Overview.....	3
PeopleSoft CRM Product and Item Integrations.....	3
PeopleSoft CRM Product and Item Implementation.....	4

Part 2 Product and Item Management

Chapter 2

Understanding Products and Items in PeopleSoft CRM.....	7
Products.....	7
Items.....	8
The Relationship Between Products and Items.....	9

Chapter 3

Setting Up Product Definitional Elements.....	11
Understanding Product Definitional Elements.....	11
Creating Product Definitional Elements.....	12
Pages Used to Set Up Product Definitional Elements.....	13
Selecting Options for Managing Products.....	14
Specifying Installed Product Rules.....	14
Defining Product Automatic Numbering Options.....	15
Defining Product Group Codes.....	16
Viewing Products That Are Linked to the Product Group.....	17
Defining Product Categories.....	18
Defining Product Brands.....	18
Entering Competitor Information.....	19
Defining Branch Scripts.....	19
Setting Up Product Relationship Codes.....	20
Defining Product Attributes.....	21
Setting Up Subscription Terms.....	22

Chapter 4

Defining Items.....	23
Understanding Item Definition in PeopleSoft CRM.....	23
Item Status.....	24
Defining Item Control Values.....	25
Pages Used to Define Item Control Values.....	26
Specifying Item Numbering.....	26
Defining Item Groups.....	27
Defining Item Families.....	27
Defining Stock Types.....	28

Defining and Maintaining Items.....29
 Pages Used to Define and Maintain Items.....29
 Defining Items.....29
 Establishing Substitute Definitions.....35
 Associating Items with Additional UOMs.....36
 Page Used to Associate Items with Additional UOMs.....36
 Adding UOMs.....36

Chapter 5

Working with Item Assemblies.....41
 Understanding Item Assemblies.....41
 Defining Item Assemblies.....41
 Common Elements Used in This Section.....42
 Pages Used to Define Item Assemblies.....42
 Specifying Assembly Components.....42
 Describing the Service Assembly and Recording Notes.....43
 Defining Component Details.....44
 Adding Notes to Assembly Definition.....45
 Viewing Assembly Information.....45
 Common Elements Used in This Section.....45
 Pages Used to View Assembly Information.....46
 Searching for Item Assemblies.....46
 Viewing Component Detail and Warranty Information.....47

Chapter 6

Checking Item Balances and Availability.....49
 Understanding Balance Inquiries.....49
 Item Availability Inquiries.....49
 Item Balance Inquiries by Business Units.....50
 Item Balance Inquiries by Group Members.....51
 Viewing Balance Information.....51
 Common Elements Used in This Section.....51
 Pages Used to View Balance Information.....52
 Checking Item Balances by Inventory Business Units.....53
 Checking Item Balances by Group Members.....53
 Viewing Error Messages.....54

Chapter 7

Setting Up Products.....57

Understanding Products in PeopleSoft CRM.....57

 Product Definitions in PeopleSoft CRM.....57

 Integrations with PeopleSoft SCM and PeopleSoft Proposal Management.....58

Defining Products.....61

 Pages Used to Define Products.....62

 Defining Product Information.....62

 Defining External Product Descriptions.....66

 Defining Product Actions.....67

 Defining Product Attributes.....68

 Attaching Files to Product Definitions.....69

 Defining Installed Product Rules.....69

 Attaching Images to Product Definitions.....70

 Associating Branch Scripts with Products.....70

 Adding Products to Product Groups.....71

 Defining Product Availability for Regions.....71

 Tracking Competing Products.....72

 Enter Sub Business Projects.....72

Assigning Product UOMs.....73

 Page Used to Assign Product UOMs.....73

 Assigning Product UOMs.....73

Defining Product Package Components.....74

 Prerequisite.....74

 Page Used to Define Package Components.....75

 Defining Product Package Components.....75

Establishing Product Prices.....76

 Understanding Product Pricing.....76

 Pages Used to Establish Product Prices.....77

 Setting Prices for Individual Products or Product Packages by Using Top-Level Pricing.....77

 Viewing Prices for Package Components.....78

Managing Product Relationships.....79

 Understanding Product Relationships.....79

 Prerequisites.....80

 Pages Used to Manage Product Relationships.....80

 Defining Product Relationships.....80

Entering Product Notes.....81

 Prerequisite.....81

 Page Used to Define Product Notes.....82

 Entering Product Notes.....82

Chapter 8

Defining Options for Integration to the Asset Repository Module in PeopleSoft Financials.....83
 Understanding Integration Options for the Asset Repository Module.....83

Chapter 9

Creating Catalogs.....85
 Understanding Catalogs.....85
 Catalogs in PeopleSoft CRM.....85
 Prerequisites.....86
 Creating Catalog Display Templates.....87
 Understanding Catalog Display Templates.....87
 Pages Used to Create Catalog Display Templates.....88
 Defining Catalog Display Pages.....88
 Defining Products and Nested Catalog Display Pages.....90
 Defining Product Comparison Pages.....92
 Defining Product Detail Display Pages.....95
 Defining Featured Products Displays.....96
 Specifying Product Search Options.....97
 Defining Catalog Content and Permissions.....98
 Understanding Catalog Content and Permissions.....98
 Pages Used to Define Catalog Contents and Permissions.....100
 Defining Catalog IDs and Populating Catalog Caches.....100
 Cloning Catalogs.....103
 Defining Product Associations.....105
 Setting Up Security Memberships.....107
 Defining Recommendations.....108
 Creating Nested Catalogs.....108
 Identifying Featured Products.....108
 Searching Catalogs.....110
 Understanding Product Searches.....110
 Page Used to Search Catalogs.....111
 Searching Products.....111

Chapter 10

Tracking Installed Products and Assets.....113
 Understanding Installed Products.....113
 How Installed Products Are Used.....113
 How Installed Products Are Created and Updated.....114

System-Created Service Orders for Installed Products.....	115
Warranty Activation on Installed Products.....	116
Hierarchical Views of Installed Products.....	117
Service Activation of Pre- and Post-Paid Accounts.....	119
Understanding Installed Assets.....	119
How the CRM Installed Asset Table is Updated.....	119
How New Assets in PeopleSoft Financials are Identified in CRM.....	120
Understanding Hardware Asset Information Mapping and Reconciliation.....	121
Product Mapping for Hardware Assets.....	122
Reconciling Asset Information and Defaults.....	122
Defining Creation and Update Rules for Installed Products.....	123
Pages Used to Define Creation and Update Rules for Installed Products.....	123
Setting Up Default Installed Product Rules.....	123
Defining Installed Product Rules for a Product.....	126
Configuring Installed Product Display Options.....	128
Pages Used to Configure Installed Product Display Options.....	128
Defining Installed Product Status Options.....	128
Setting Up Display Options for Installed Products.....	129
Defining Status Translate Values for Installed Products.....	130
Setting Up Trees for Installed Products.....	132
Pages Used to Set Up Trees for Installed Products.....	133
Setting Up Trees for Installed Products.....	133
Setting Up Nodes for Installed Products.....	134
Testing Trees for Installed Products.....	137
Copying Trees.....	138
Page Used to Copy a Tree.....	138
Copying a Tree.....	138
Configuring Roles.....	138
Page Used to Configure Roles.....	139
Configuring Roles for Installed Products.....	139
Setting Up Product Registration.....	140
Managing Installed Products.....	140
Pages Used to Manage Installed Products.....	141
Entering Installed Product Information.....	141
Viewing Preventive Maintenance Details.....	148
Entering Attributes.....	148
Viewing Information About Events, Audits, Cases, and Service Orders.....	149
Viewing Installed Products.....	151
Page Used to View the Installed Product Hierarchy.....	151
Using the Installed Product Hierarchy.....	151

Mapping and Reconciling Asset Information.....153
 Prerequisites.....153
 Terms and Definitions.....153
 Pages Used to Map and Reconcile Asset Information.....155
 Assigning New Product IDs to New Asset Entries.....155
 Reconciling Asset Information.....156

Appendix A

Product Delivered Web Services.....157
 Delivered Web Services.....157
 Installed Product Web Service.....157
 Product Service Web Service.....158
 Viewing Message Elements.....159

Glossary of PeopleSoft Enterprise Terms.....161

Index183

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.
<i>Italics</i>	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 <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
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)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>

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	<p>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.</p> <p>Select Always to run the request every time the batch process runs.</p> <p>Select Don't Run to ignore the request when the batch process runs.</p>
Process Monitor	<p>Click to access the Process List page, where you can view the status of submitted process requests.</p>
Report Manager	<p>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).</p>
Request ID	<p>An ID that represents a set of selection criteria for a report or process.</p>
Run	<p>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.</p>
SetID	<p>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.</p>
Short Description	<p>Enter up to 15 characters of text.</p>
User ID	<p>An ID that represents the person who generates a transaction.</p>

PeopleSoft Enterprise CRM Product and Item Management Preface

This preface discusses:

- Additional resources.
- PeopleSoft Enterprise Customer Relationship Management (PeopleSoft CRM) application fundamentals.
- PeopleSoft Enterprise CRM business object management.
- PeopleSoft Enterprise CRM automation and configuration tools.
- PeopleSoft Enterprise CRM services foundation.
- Enterprise PeopleTools PeopleBooks.

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

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website.

Resource	Navigation
Application maintenance information	Patches + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Data models	Support, Documentation, Data Models
Enterprise Integration Point (EIP) catalog	Support, Documentation, Enterprise Integration Point (EIP) Catalog
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
PeopleBook documentation updates	Support, Documentation, Documentation Updates

Resource	Navigation
PeopleSoft support policy	Support, Support Policy
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Implement, Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Release Notes
Table loading sequences	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Table Loading Sequences
Troubleshooting information	Support, Troubleshooting
Upgrade Documentation	Implement, Optimize + Upgrade, Upgrade Guide

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

- Interactions and 360 Degree Views

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

- Self-Service For Customers

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

- Relationship Management

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

- Entitlement Management.

This part discusses setting up agreements and warranties.

- SmartViews

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

See Also

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

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 four parts:

- Business Object Management Basics

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

- Data Management for Organization Business Objects

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

- Data management for Individual Business Objects

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

- Business Object Management

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

- Customer and Worker Data Integrations

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

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, “PeopleSoft Enterprise Customer Relationship Management Business Object Management Preface”

PeopleSoft CRM Enterprise Automation and Configuration Tools

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

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

- Correspondence Management

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

- Automation Tools

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

- Configuration Tools

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

- Knowledge Management

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

- Business Process Management

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

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

See Also

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

PeopleSoft Enterprise CRM Services Foundation

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

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

- Solution Management

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”

PeopleTools PeopleBooks

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

PART 1

Getting Started

Chapter 1

Getting Started with PeopleSoft Enterprise CRM Product and Item Management

CHAPTER 1

Getting Started with PeopleSoft Enterprise CRM Product and Item Management

This chapter provides an overview of PeopleSoft Customer Relationship Management (PeopleSoft CRM) and discusses product and item integrations.

PeopleSoft CRM Product and Item Management Overview

In PeopleSoft CRM, products are what you sell and support. Almost all customer-facing PeopleSoft CRM applications reference product data, including (but not limited to) PeopleSoft CRM: Field Service, Support and Help Desk, Sales, Order Capture, and Marketing. You can group and present product information in catalogs for use by the sales force or by self-service applications, plan sales and marketing campaigns around products, manage product portfolios, or identify the competencies required to service and support a product and use that to assign workers to service and support tasks.

This book discusses setup tasks and data management for products and items in PeopleSoft CRM, including how to define and price product packages and standalone products.

PeopleSoft CRM Product and Item Integrations

PeopleSoft CRM integrates with PeopleSoft Supply Chain Management (SCM) and with other SCM, or order fulfillment, systems. SCM systems use product definitions to manage products and product components throughout the manufacturing process. PeopleSoft CRM delivers several enterprise integration points (EIPs) that maintain data integrity between PeopleSoft CRM and third-party SCM systems by synchronizing product and item data.

Service Oriented Architecture (SOA) has emerged as a standard form of integration. To lower customer costs and provide interoperability, PeopleSoft has made certain transactions available through SOA. PeopleTools has converting existing Integration Broker messages to web services. These web services have specific PeopleSoft structures. Part of this feature includes the delivering of more generic web services that could be used with other CRM systems.

This feature provides web services for existing installed product functionality so that any business process can call the web service and leverage the features. To support business processes for installed products, PeopleSoft has built these web services and operations:

Operation	Message Type	Description
Search Installed Product	Synchronous	User specifies criteria and the system returns a list of installed products.
Get Installed Product	Synchronous	User specifies key data and the system returns the installed product's data.
Create Installed Product	Synchronous	User specifies data to be used in the creation of an installed product
Update Installed Product	Synchronous	User specifies data to be used in updating a product that is already installed.

See Also

[Appendix A, "Product Delivered Web Services," page 157](#)

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Understanding Business Process Management"

PeopleSoft CRM Product and Item Implementation

PeopleSoft Setup Manager enables you to review a list of setup tasks for your organization for the products that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, as well as the corresponding PeopleBook documentation.

You set up products and items as part of the implementation process for PeopleSoft CRM products such as PeopleSoft Integrated FieldService and PeopleSoft Order Capture.

PART 2

Product and Item Management

Chapter 2

Understanding Products and Items in PeopleSoft CRM

Chapter 3

Setting Up Product Definitional Elements

Chapter 4

Defining Items

Chapter 5

Working with Item Assemblies

Chapter 6

Checking Item Balances and Availability

Chapter 7

Setting Up Products

Chapter 8

Defining Options for Integration to the Asset Repository Module in PeopleSoft Financials

Chapter 9

Creating Catalogs

Chapter 10

Tracking Installed Products and Assets

CHAPTER 2

Understanding Products and Items in PeopleSoft CRM

This chapter discusses:

- Products.
- Items.
- The relationship between products and items.

Products

Products in PeopleSoft Customer Relationship Management (PeopleSoft CRM) are what you sell to customers. You might sell physical goods such as cars or refrigerators or intangible services (also known as service products) such as 3000-minute rate plans for wireless phones.

Product Definitions

PeopleSoft CRM represents products by product definitions. A product definition, keyed by product ID and setID, stores all of the product information that company representatives reference to sell or support products.

A product definition and its associated price setup provide the foundation for many features of PeopleSoft CRM, which include product ordering, catalogs, catalog searches, product advisor dialogs, dynamic product packages, and configured products that are accessed from applications such as PeopleSoft Order Capture, PeopleSoft Order Capture Self Service, PeopleSoft Sales, PeopleSoft Advanced Configurator, and so forth. You also use products in PeopleSoft Integrated FieldService, PeopleSoft Support, and PeopleSoft HelpDesk for on-site and off-site customer support processing.

Use the Product Definition component to define products. If you implement both PeopleSoft CRM and PeopleSoft Supply Chain Management (PeopleSoft SCM) or another third-party supply chain management system, you can use the Product enterprise integration point (EIP) to synchronize product data between the two systems.

Note. If you integrate between PeopleSoft CRM and a supply chain management system, you should define all product records in the PeopleSoft CRM system to take advantage of functionality, such as dynamic product packages and configured products, that are offered only in PeopleSoft CRM.

Types of Product Definitions

The types of product definitions in PeopleSoft CRM are:

- Engagement service

Engagement services are services such as consulting that are priced by PeopleSoft Proposal Management. PeopleSoft CRM integrates with PeopleSoft Proposal Management to exchange quote, status, and pricing information.

See [Chapter 7, “Setting Up Products,” Integrations with PeopleSoft SCM and PeopleSoft Proposal Management, page 58.](#)

- Service agreement

Service agreements are agreements with a company to provide services, such as repair and maintenance, for a product or to provide a service such as satellite TV or lawn care that is purchased by a customer. Service agreements are priced through the service pricing engine, and do not use the product price or price rule features to retrieve a price. When you set up a service agreement product type, you first set up the agreement template that defines the service that is provided by the agreement.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up and Managing Agreements and Warranties” and *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Defining Pricing Information for Services and Support Offerings”.

- Service product

Service products, such as cellular phone service, are not physical items that are inventoried. The customer purchases the service and not a physical product.

- Standard product

Standard, or standalone, products do not contain components. You can designate that a standalone product is a configured product by selecting the configuration option. When you define a product, you select whether it is standalone or contains components.

- Package product

Product packages contain more than one component. A product package can include other packages and are priced either at the product level or as the sum of the package components. When you define a product package, you designate the pricing method.

Package products can be configured. They can either be lightly configured packages or configured packages using the Advanced Configurator.

- Subscription product

Subscription products allow you to record orders and quotes consisting of subscription based installment billing periods. This product type may or may not contain a product package.

See Also

[Chapter 3, “Setting Up Product Definitional Elements,” page 11](#)

[Chapter 7, “Setting Up Products,” page 57](#)

Items

Items are tangible goods or materials that an organization keeps in stock for sale or use in the future. You use items to keep track of material stocks—goods that are located in physical storage locations such as warehouses, storerooms, or service trucks—in the inventory control system.

Item Definition

You define items either by using the Item Definition component or by using the Item Master EIP (enterprise integration point) to integrate with an inventory or purchasing system.

Because the synchronization of item definitions is one-way from the inventory or purchasing system to the PeopleSoft CRM system, PeopleSoft suggests that you create and update item records in the inventory or purchasing system, then publish them to PeopleSoft CRM.

Note. If you integrate with an inventory or purchasing system, you are unable to update the item definition within PeopleSoft CRM.

See Also

[Chapter 4, “Defining Items,” page 23](#)

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Ordering and Receiving Materials”

The Relationship Between Products and Items

In PeopleSoft CRM, a product is associated with only one item (one-to-one relationship). For any physical product that you sell in-store, there is an item equivalent in the inventory system, which establishes the one-to-one relationship. You stock the item on the warehouse shelf and use it for fulfilling orders of that product.

More than one product can use the same item. This typically happens when you position or price the same item differently for different product lines.

A product is not required to have an associated item. For example, a 3000-minute rate plan for wireless phones does not have a physical equivalent on a storage shelf and, therefore, is not associated with any item in the inventory system.

Items are associated with products for fulfillment and servicing purposes in PeopleSoft CRM.

See *PeopleSoft Enterprise Managing Items PeopleBook*

See *PeopleSoft Enterprise Order Management PeopleBook*.

See [Chapter 10, “Tracking Installed Products and Assets,” Defining Creation and Update Rules for Installed Products, page 123](#).

Items in PeopleSoft Integrated FieldService

In PeopleSoft CRM, products are used in the Installed Product and Services component and are required. Items are an option in the Installed Product and Services component. The Installed Assets component is for internal assets that are used in PeopleSoft HelpDesk.

Service technicians order items that they need to perform service using the Order Materials component, either as an interunit transfer or purchase order. After the purchasing or inventory system processes the order and ships an item to the technician’s truck, the technician installs the item and uses the Time Material Expense page within the Service Order component to report the receipt and usage of the new item, as well as the removal of the old one.

You can set up rules to govern when the system creates or changes the status of installed products.

For example, the system creates an installed product or changes its status when:

- A product is ordered through PeopleSoft Order Capture.
- An automatic shipping notification (ASN) for the product is received from a fulfillment system.
- A material usage or removal is recorded in PeopleSoft Integrated FieldService.

When these activities occur, the PeopleSoft CRM system passes product information along with the inventory system serial number (if applicable) to the installed product.

For example, an electrical appliance retailer might keep stock in a warehouse. The inventory system associates each product with an item on the warehouse shelf. When a customer places a product order and the order comes through the fulfillment system, the associated item of the product is picked from the warehouse and shipped.

The serial number is sent as part of the ASN message, which triggers either the creation of an installed product for the shipped product or an update of the existing installed product for that product.

CHAPTER 3

Setting Up Product Definitional Elements

This chapter provides an overview of product definitional elements and discusses how to create them.

Understanding Product Definitional Elements

Definitional elements describe products in the PeopleSoft CRM system. You must set up these definitional elements before defining products in PeopleSoft CRM:

- Product installation options
- Rules for generating product ID numbers
- Rule sets for creating and updating installed products
- Product groups

Product groups enable you to share processing parameters between products. PeopleSoft CRM delivers a set of basic product groups.

- Product categories

Product categories are used to group products in catalogs.

- Product brands
- Competitor codes

Competitor codes enable you to keep track of competitor's similar products.

- Branch scripts

Branch scripts predefine sales dialogue with customers, provide direction to customer service representatives, and guide internal processes and operations.

- Region IDs

Region IDs enable selling by region.

- Competency codes

Competency codes define skills required to support the product.

- Relationship IDs

Relationship IDs define the relationship of one product to another. For example, one product might either complement or substitute for another product.

- Product attributes

Product attributes describe characteristics of the product, such as height, weight, color, and so forth.

- Subscription Terms

Length of time for which the subscription is valid.

See Also

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

[Chapter 4, “Defining Items,” page 23](#)

[Chapter 10, “Tracking Installed Products and Assets,” page 113](#)

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Managing Workforce Competencies”

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Setting Up General Options,” Setting Up Regions

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

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

Creating Product Definitional Elements

To create product definitional elements, use the Product Installation (PROD_INSTALLATION), Automatic Numbering (AUTO_NUM_PNL), Product Group (PROD_GROUP_TBL), Product Category (PROD_CATEGORY), Product Brand (PROD_BRAND), Competitors (COMPETITOR_CD), Region (RB_REGION), Attribute Definition (RB_ATTRIBUTE), and Auto Numbering (AUTO_NUM_PNL) components.

This section discusses how to:

- Select options for managing products.
- Specify installed product rules.
- Define product automatic numbering options.
- Define product group codes.
- Viewing products that are linked to the product group.
- Define product categories.
- Define product brands.
- Enter competitor information.
- Define branch scripts.
- Set up product relationship codes.
- Define product attributes.
- Set up subscription terms.

Pages Used to Set Up Product Definitional Elements

Page Name	Object Name	Navigation	Usage
Product Installation	PROD_INSTALLATION	Set Up CRM, Install, Product Options, Product Installation	Select options for managing products.
Installed Product Defaults	RF_INSTPRD_DFLT	Set Up CRM, Install, Product Options, Installed Product Defaults	Specify rules that determine how system transactions create and update installed products.
Setup Auto Numbers	AUTO_NUM_PNL	Set Up CRM, Common Definitions, Codes and Auto Numbering, Automatic Numbering, Auto Numbering	Define automatic numbering options for product IDs.
Product Group	PROD_GROUP_TBL	Products CRM, Product Groups, Product Group	Define product group codes.
Linked Products	PROD_GRP_OVERVIEW	Products CRM, Product Groups, Linked Products	View products that belong to a product group.
Product Category	PROD_CATEGORY	Products CRM, Product Category, Product Category	Define product category codes.
Product Brand	PROD_BRAND	Products CRM, Product Brand, Product Brand	Define product brand codes.
Competitors	COMPETITOR_CD	Products CRM, Competitors, Competitors	Define competitor codes.
Script	RC_BS_MAIN	Set Up CRM, Common Definitions, Process Automation, Script, Script	Define a branch script for support and sales personnel.
Region	RB_REGION	Set Up CRM, Common Definitions, Location, Region Codes, Region	Set up regions.
Competencies	COMPETENCY_TABLE	Set Up CRM, Common Definitions, Competencies, Competencies	Establish competency codes.
Product Relations Codes	RB_RELATIONS	Products CRM, Product Relations Codes, Product Relations Codes	Set up the codes that describe relationships between products.
Attribute Definition	RB_ATTRIBUTE_MAIN	Set Up CRM, Common Definitions, Attributes, Attribute Definition, Attribute Definition	Define a product attribute.
Subscription Terms	PROD_SUBSCRIPT	Products CRM, Subscription Terms, Subscription Terms	Define a length of time the subscription is valid.

Selecting Options for Managing Products

Access the Product Installation page.

The screenshot shows a web interface with two tabs: "Product Installation" (selected) and "Installed Product Defaults". Under the "Product Installation" tab, there are three sections of options:

- Item Options:** A single checkbox labeled "Item Required" which is currently unchecked.
- Package Options:** A single checkbox labeled "Components can be deleted" which is checked.
- Relationship Options:** Two checkboxes: "Alternate Priority Required" and "Alternate Quantity Required", both of which are unchecked.

Product Installation page

Item Required

Select if you have installed PeopleSoft Supply Chain Management (PeopleSoft SCM) or PeopleSoft Integrated FieldService. You can clear this check box if the order fulfillment system does not require items or if products are not inventoried.

If you select this check box, you must use the Item Definition component to define product IDs, descriptions, and standard units of measure. You then complete the product definition in the Product Definition component.

Components can be deleted

Select to enable deletion of components in a product package.

Alternate Priority Required and Alternate Quantity Required

Select to enter a priority and quantity on the Product Relationships page for an alternate relationship type. Select these check boxes when the PeopleSoft CRM system is integrated with PeopleSoft SCM.

See Also

[Chapter 4, "Defining Items," page 23](#)

Specifying Installed Product Rules

Access the Installed Product Defaults page.

Product Installation **Installed Product Defaults**

Default Values

Products Which Require a Service Order for Installation

Order Capture

Create Installed Product
Initial Status: Pending

Shipping Notification (ASN)

Create Installed Product **Update Installed Product**
Initial Status: Shipped New Status: Shipped

Manage Material

Create Installed Product **Update Installed Product**
Initial Status: Installed New Status: Installed

Installed Product Defaults page (1 of 2)

Products Which Do Not Require a Service Order for Installation

Order Capture

Create Installed Product
Initial Status: Pending

Shipping Notification (ASN)

Create Installed Product **Update Installed Product**
Initial Status: Installed New Status: Installed

Manage Material

Create Installed Product **Update Installed Product**
Initial Status: Installed New Status: Installed

Installed Product Defaults page (2 of 2)

See [Chapter 10, “Tracking Installed Products and Assets,” page 113.](#)

Defining Product Automatic Numbering Options

Access the Setup Auto Numbers page.

Setup Auto Numbers

SetID SHARE SHARE

Number Type IPRD Installed Product

*Field Name INST_PROD_ID Length 20

*Start Seq	*Max Length	*Description	Last Number Issued	Default?
000	10	Installed Product	300105	<input checked="" type="checkbox"/>

Setup Auto Numbers page

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

Defining Product Group Codes

Access the Product Group page.

Product Group

Product Group Details

SetID CRM02

Product Group SOFTWARE

*Product Group Type Forecast

*Effective Date 04/13/2001

*Status Active

*Description Application Software

Short Description Software

Global

Product Group page

Note. You cannot delete a product group from this page. If you integrate your PeopleSoft CRM applications with your PeopleSoft Supply Chain Management applications, the system would also delete the product from your SCM database. This happens because SCM subscribes to a message that the CRM database publishes. If the system allowed you to delete the product group from this page, it could cause problems in your SCM operating environment. As such, this design is intentional.

Product Group Type

Select the product group type from these available values:

- *Accounting*
- *Buying Agreement*
- *Customer Target*

- *Forecast*
- *Freight*
- *General*
- *Literature*
- *Organization*
- *Pricing*
- *Product Catalogs*
- *Product Line*
- *Reporting*
- *Reporting Externally*
- *Reporting Internally*
- *Self-Service Products*
- *Tax*
- *Transportations*
- *VAT*

Global

Select to include all products in the product group.

Note. This selection is not used for product groupings in the catalog.

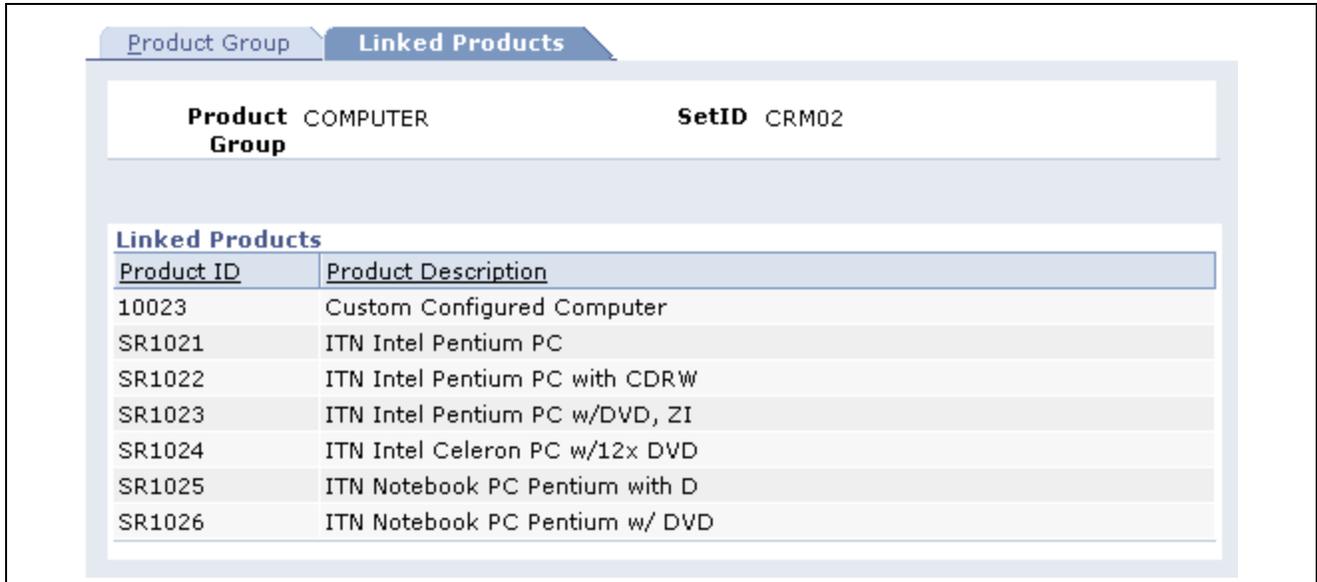
See [Chapter 9, “Creating Catalogs,” Understanding Catalogs, page 85.](#)

See Also

[Chapter 7, “Setting Up Products,” Adding Products to Product Groups, page 71](#)

Viewing Products That Are Linked to the Product Group

Access the Linked Products page.

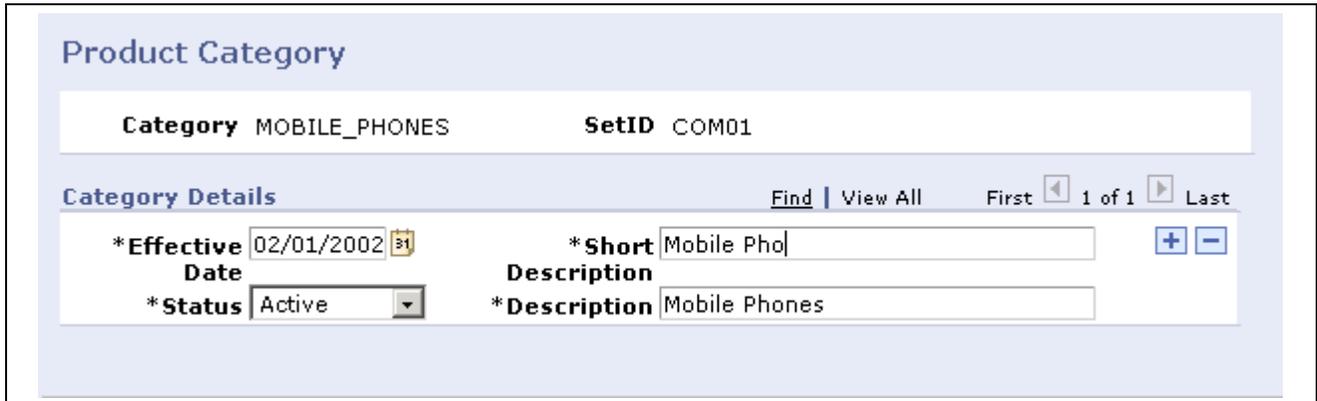


Linked Products page

This page displays the active products that are included in the product group.

Defining Product Categories

Access the Product Category page.



Product Category page

Use this page to define product category codes. Enter the date the product category will be effective, a short and long description, as well as the status; either *Active* or *Inactive*.

Defining Product Brands

Access the Product Brand page.

Product Brand

Brand WONDER **SetID** CRM02

Find | View All First ◀ 1 of 1 ▶ Last

* **Effective Date** 01/29/2002 [calendar icon] * **Short Description** Wonder Wor [+ -]

* **Status** Active [dropdown] * **Description** Wonder World Computers

Product Brand page

Use this page to define product brands. Enter the date the product brand will be effective, a short and long description, as well as the status; either *Active* or *Inactive*.

Entering Competitor Information

Access the Competitors page.

Competitors

Competitor MAYTAG **SetID** FRA02

Competitor Code Details Find First ◀ 1 of 1 ▶ Last

* **Effective Date** 02/15/2006 [calendar icon] * **Short Description** Maytag [+ -]

* **Status** Active [dropdown] * **Description** Maytag Washers and Dryers

Competitors page

Use this page to enter competitor information. Enter the date the competitor will be effective, a short and long description, as well as the status; either *Active* or *Inactive*.

Defining Branch Scripts

Access the Script page.

Script Script Tree Script Validation

Script Detail

SetID CRM02 Effective Date 01/01/2000

Script Name UPSSELL_RAM *Status Active

Script Category Branch Script *Script Type Lead Qualification

Description Upsell RAM

Rating Detail

Rate Set Name CRM02-UPSSELL_RAM Script Total Weight

Script Actions

Pre-Script Action Incomplete Script Action

Post-Script Action

Exit Message

Exit Message

Display Token

Modified 04/05/2001 6:37PM PDT FUN

Script page

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

Setting Up Product Relationship Codes

Access the Product Relations Codes page.

Product Relations Codes

Product Relations Codes

Relation ID	Description	Long Description	Required	Priority	Quantity	Catalog	Advisor		
AGRE	Agreement	Agreements fo	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
ALT	Alternates	Similar Produc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
COMPL	Compleme	Products comp	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
CROSS	Cross-Sells	Enhance this p	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
PRERQ	Prerequisite	Other product	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
REPL	Replaceme	Replacements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
SF	Service Fea	Service Featu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-
UPSEL	Up-Sells	The next step	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-

Product Relations Codes page

The Product Relations Codes page lists the possible relationships among products. The options that you select for a relationship type determine the options that are available on the Product Relationships page when you define a product.

Required	Select to include the Required check box on the Product Relationships page. The Required check box enables you to require that the related product is present whenever the listed product appears.
Priority	Select to include the Priority check box on the Product Relationships page. The Priority check box enables you to specify a priority among alternative related products.
Quantity	Select to include the Quantity field on the Product Relationships page. The Quantity field enables you to specify how many times the given relationship can occur.
Catalog	Select to include the Catalog check box on the Product Relationships page. The Catalog check box controls whether related products appear in the catalog along with the main product.
Advisor	Select to enable the use of the PeopleSoft Real-Time Advisor for up-sell and cross-sell opportunities.

Note. The product relations codes that appear in the preceding example are delivered as system data. You can add relations, but you should not remove any delivered relations.

See Also

[Chapter 7, “Setting Up Products,” Managing Product Relationships, page 79](#)

PeopleSoft Enterprise Real-Time Advisor CRM 9 PeopleBook

Defining Product Attributes

Access the Attribute Definition page.

Attribute Definition

Name CK_FEE_WAIV_BAL	Market Financial Services
*Label <input type="text" value="Balance to Waive Fee"/>	*Status <input type="text" value="Active"/>
*Group <input type="text" value="Terms - Checking"/>	Usage Information
Validation Rule <input type="text"/>	
Description <input type="text" value="Balance required to wave monthly fee"/>	
*Field Type <input checked="" type="radio"/> Edit Box <input type="radio"/> Drop-Down	

Edit Box Details

Data Type <input type="text" value="Number"/>	Decimal Position <input type="text" value="2"/>
Default Value <input type="text" value="0.00"/>	

Modified 10/18/2002 5:31PM PDT FSISAMPLE

Attribute Definition page

Warning! Although product attributes provide flexibility for modeling products, attributes can adversely affect runtime performance. PeopleSoft suggests that you not use more than a few attributes per product.

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

Setting Up Subscription Terms

Access the Subscription Terms page.

Subscription Terms

Subscription Term 123	SetID CRM02
*Status <input type="text" value="Active"/>	*Duration <input type="text" value="3"/>
*Description <input type="text" value="Quarterly Plan"/>	*Frequency <input type="text" value="Months"/>
Long Description <input type="text" value="Quarterly Plan - CellPhoneService"/>	

Subscription Terms page

Enter information in the available fields to define the subscription and the length of time the subscription is valid.

CHAPTER 4

Defining Items

This chapter provides an overview of item definition in PeopleSoft Customer Relationship Management (PeopleSoft CRM) and discusses how to:

- Define item control values.
- Define and maintain items.
- Associate items with additional units of measure (UOMs).

Understanding Item Definition in PeopleSoft CRM

An item must be available in PeopleSoft CRM system tables before you can reference it on an installed product, define material requirements for a service, use it to complete work on a service order, or create a return material authorization (RMA) enabling a customer to return it.

To define items, use the Item Definition component, or use the Item Master enterprise integration point (EIP) to synchronize PeopleSoft CRM item definition records with item records that you defined in the inventory and purchasing system.

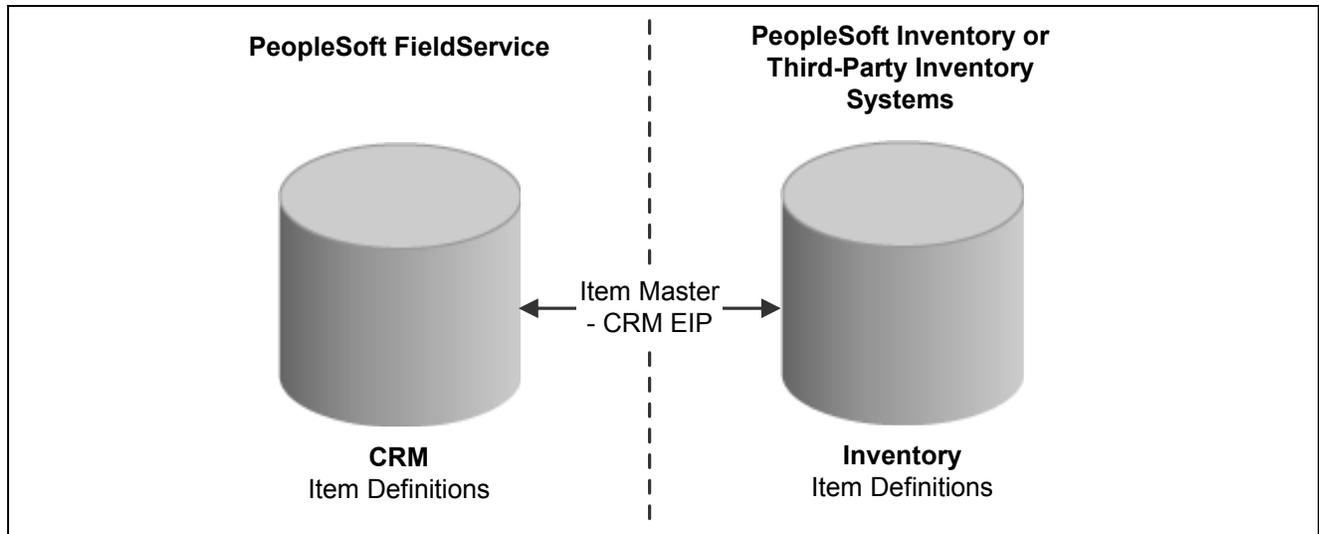
Important! To process material management transactions that take place in PeopleSoft CRM and the inventory and purchasing system, the definition of the item on the transaction must be identical in both systems. If you do not use the Item Master EIP to keep item information synchronized, you must manually duplicate changes or additions to item records in both systems.

The Item Master EIP includes three publishing application messages:

- ITEM_CRM_FULLSYNC_EFF
- ITEM_CRM_SYNC_EFF
- ITEM_CRM_SYNC

At initial implementation, the inventory and purchasing system publishes a full set of item records to the PeopleSoft CRM system using the ITEM_CRM_FULLSYNC_EFF application message. When you add or modify item definitions in the inventory and purchasing system after the initial synchronization, each is published to PeopleSoft CRM using the ITEM_CRM_SYNC and ITEM_CRM_SYNC_EFF application messages. PeopleSoft CRM is a subscriber to, not a publisher of, these messages. Any changes that you make to item definitions in PeopleSoft CRM are not published or synchronized with the inventory and purchasing system.

When the messages of the Item Master EIP are activated, you cannot use the Item Definition component in PeopleSoft CRM to change or add item records. Most updates are made to the item records in the inventory and purchasing system and publish them to PeopleSoft CRM, excluding the Configuration Option section and the Short Description field, as this diagram illustrates:



Data flow from inventory and purchasing system to PeopleSoft CRM

See Also

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

Item Status

This table lists the statuses that items can have in PeopleSoft CRM:

Status	Description
Under Initialization	<p>The item definition has not been completed. No transactions are permitted, and the system does not list the item in any prompts.</p> <p>Note. PeopleSoft Inventory and Purchasing do not publish item definition records for items with an Under Initialization status. Only items defined in PeopleSoft CRM using the Item Definition component can have this status.</p>
Pending Approval	<p>The item definition has been completed and is awaiting approval. No transactions are permitted, and the system does not list the item in any prompts. Pending approval items are not sent from inventory until approval occurs.</p>
Denied Approval	<p>The item definition has been denied. No transactions are permitted, and the system does not list the item in any prompts.</p> <p>Note. In PeopleSoft CRM, item definition approval processing is a manual business process. PeopleSoft Inventory and Purchasing do not publish item definition records for items with <i>Pending Approval</i> or <i>Denied Approval</i> status. Only items that are defined in PeopleSoft CRM using the Item Definition component can have these status values.</p>
Active	<p>The item definition is active in the system. Items with an <i>Active</i> status are eligible for all item transactions in PeopleSoft CRM.</p>

Status	Description
Hold	The item definition is on hold in the system.
Inactive	The item is no longer active in the system.
Discontinue	<p>Usage of the item is being phased out.</p> <p>Note. In PeopleSoft CRM, you can receive and report usage and removal for an item with a <i>Hold</i>, <i>Inactive</i>, or <i>Discontinue</i> status using the Order Materials and Service Order components in PeopleSoft Integrated FieldService. You can also create an RMA for customers that are returning the item using the RMA Form (return material authorization form) component in PeopleSoft Support. However, you cannot enter a request to order any quantity of the item using the Order Materials component, nor can you create replacement orders for the item using the RMA Form component.</p>

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Ordering and Receiving Materials”

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “Managing Material Returns,”
Understanding Material Return Processing

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

Defining Item Control Values

To define item control values, use the Item Number Control (INV_ITEM_CONTROL), (Item Groups (INV_ITEM_GROUP), Item Families (INV_PROD_FAMILIES), and Stock Types (INV_STOCK_TYPE) components.

This section discusses how to:

- Specify item numbering.
- Define item groups.
- Define item families.
- Define stock types.

Note. Item control values in PeopleSoft CRM are used only if you synchronize them with PeopleSoft Supply Chain Management (PeopleSoft SCM) applications, including PeopleSoft Inventory and Purchasing. If you synchronize item records with another system, the Item Master EIP application messages do not update any control value information that is documented in this section.

Pages Used to Define Item Control Values

Page Name	Object Name	Navigation	Usage
Item Number Control	ITEM_NBR_CONTROL	Items CRM, Item Number Control, Item Number Control	Define whether new items are numbered sequentially or manually.
Item Group	INV_ITEM_GROUP	Items CRM, Item Groups, Item Group	Define groups to categorize items. You can use item group as an alternate search key for Item ID.
Item Family	PROD_FAMILY_INV	Items CRM, Item Families, Item Family	Define families to which items can be assigned during the item definition process. You can use item family as an alternate search key for the item ID.
Stock Type	INV_STOCK_TYPE	Items CRM, Stock Types, Stock Type	Create ownership information codes for inventory items that are leased or consigned. You must specify stock types for any non-owned items that you define on the Item Definition page.

Specifying Item Numbering

Access the Item Number Control page.

Item Number Control page

Note. The item number controls that you define on this page are used for PeopleSoft CRM purposes only. If you synchronize item records with another system, the Item Master EIP application messages do not update item number control information.

Auto Number Items

Select to enable automatic numbering. When automatic numbering is enabled, you can accept the system-generated *NEXT* value as the ID for each item that you define. Even if automatic numbering is enabled, you can override the *NEXT* value by entering item IDs manually.

Note. If you do not select this check box, you must enter IDs manually when defining new items on the Item Definition page.

Last Item Number Assigned

Enter the start of the numbering sequence that the system uses to generate unique item IDs automatically. When you select *NEXT* as the item ID during

the item definition process, the system assigns the next sequential number in this numbering sequence as the item ID.

See Also

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

Defining Item Groups

Access the Item Group page.

The screenshot displays the 'Item Group' page. At the top, there is a header with the title 'Item Group' and a search bar containing 'SetID CRM01' and 'Item Group HARDWARE'. Below the header, there are navigation options: 'Find | View All', 'First', '1 of 1', and 'Last'. The main form area contains fields for '*Effective Date' (04/12/2001), '*Status' (Active), '*Description' (Computer Hardware), and 'Short Description' (Hardware).

Item Group page

Use this page to define groups that categorize items in PeopleSoft CRM. The concept of item groups originates from PeopleSoft Inventory. It is used on the Item Definition page for information purposes.

For more information on item groups, refer to *PeopleSoft Managing Items PeopleBook* on defining item control values.

VAT Defaults

Click to access the VAT Defaults Setup page, which is a common page used to set up value-added tax (VAT) defaulting for all PeopleSoft applications that process VAT transactions. On this page you can define VAT defaults for bill sources, per VAT registration country and state. Clicking this link transfers you to PeopleSoft Financials, where you must set up your VAT billing.

Service VAT Treatment Defaults

Click to access the Service VAT Treatment Drivers Setup page, which is a common page used to set up VAT services treatment for all PeopleSoft applications that process VAT transactions. If you are required to implement special handling for services, you can specify VAT service treatment defaults for bill sources on this page for a supplier's (seller's) location country and state. VAT defaults are also used when integrating with PeopleSoft Transaction Billing Processor. Clicking this link transfers you to PeopleSoft Financials, where you must set up your VAT billing.

Defining Item Families

Access the Item Family page.

Item Family page

Use this page to define families with which items can be associated, besides item groups, during the item definition process in PeopleSoft CRM. Item families are the same as item groups. They are used on the Item Definition page for information purposes. There's no formal relationship established between item families and groups, but you can further categorize groups by using families.

For example, you can define a group on *freezers* and create *freezer replacement parts* and *freezer accessories* as families of this group.

Fields on the Item Families and Item Groups pages are identical.

For more information on item families, refer to *PeopleSoft Managing Items PeopleBook* on defining item control values.

Defining Stock Types

Access the Stock Type page.

Stock Type page

Use this page to create ownership information codes for inventory items that are leased or consigned.

For information on stock types, refer to the *PeopleSoft Managing Items PeopleBook* on defining item control values.

Defining and Maintaining Items

To define and maintain items, use the Item Definition (RF_ITEM_DEFN) component.

This section discusses how to:

- Define items.
- Establish substitute definitions.

If you are synchronizing with another system using the Item Master EIP, you can view the current definition for an item in PeopleSoft CRM using the Item Definition component under Items CRM, Review Item Definition.

Pages Used to Define and Maintain Items

Page Name	Object Name	Navigation	Usage
Item Definition	RF_ITEM_DEFN	<ul style="list-style-type: none"> • Items CRM, Inventory Item Definition, Item Definition • Items CRM, Review Item Definition, Item Definition 	Define inventory items at the setID level.
Item Substitutes	RF_ITEM_SUB	<ul style="list-style-type: none"> • Items CRM, Inventory Item Definition, Item Substitutes • Items CRM, Review Item Definition, Item Substitutes 	Establish substitution definitions for items. An item substitution definition specifies alternate items that may be used by personnel requesting stock for activities on service orders. View an item's substitution definition from the RMA Form component in PeopleSoft Support and from the Order Materials and Service Order component in PeopleSoft Integrated FieldService.

Defining Items

Access the Item Definition page.

Item Definition

Save
Personalize

Item ID NEXT
Description Custom Road Bicycle
Item Group Bicycles

SetID SHARE
Current Status Active
Family

Item Definition

Item Substitutes

Item Definition

SetID SHARE

***Description** Custom Road Bicycle

Short Description CRB

***Standard Unit of Measure** EA Each

Current Status Date 01/16/2006

Current Status Active

Stock Type

Item Group BIKES Bicycles

Family

Currency Code USD US Dollar

Service Price 50.00

Service Exchange Amount 25.00

Item Definition page (1 of 2)

Item Type

Inventory Item

Non-Owned Item

Consigned

Item Tracking

Lot Control

Serial Control

Shipping Serial Control

Item Usage

Serviceable

Returnable

Consumable

Product Options

Create Product ***Product Type** Standard Product

Use Item ID **Product ID** NEXT

Configuration Options

Configured

Schema HEALTH_INSURANC

Warranty Information

Warranty Name

Status Active

Audit History

Item Definition page (2 of 2)

Item Definition

Description and Short Description

Enter long and short descriptions. You cannot include embedded single or double quotation marks in the description text.

Note. The Short Description field exists only in CRM, not PeopleSoft Inventory. This field can be updated even if the item Enterprise Integration Points are active.

Standard Unit of Measure	Enter the base unit of measure for the item that reflects the smallest transactable UOM for the item. Establish UOMs on the Units of Measure page under Set Up CRM, Common Definitions.
---------------------------------	---

Warning! To minimize rounding discrepancies when using multiple UOMs, the standard UOM must be the smallest valid UOM for the item. Also, set up the standard UOM as a whole number.

Current Status Date	Displays the date on which the current status of the item definition was updated.
Stock Type	Enter the owner of the stock if the item is non-owned. First, you must establish stock types on the Stock Types page.
Item Group	Enter a group ID to categorize the item as an alternate search key. Establish item groups on the Item Groups page.
Family	Enter a family ID to categorize the item as an alternate search key. Establish item families on the Item Families page.
Currency Code	Enter the currency code used for the item.
Service Price	Enter the price for the service item being defined.

Note. This is the price that is picked up for billing the customer when integrating with PeopleSoft Transaction Billing Processor for any materials that were used to service the customer.

Service Exchange Amount	Enter the amount the customer will be credited if the old item is exchanged for the new one.
--------------------------------	--

Note. This is the price that is used to credit the customer when performing a service order and removing material when integrating with PeopleSoft Transaction Billing Processor.

VAT Defaults	Click to access the VAT Defaults Setup page, which is a common page used to set up value-added tax (VAT) defaulting for all PeopleSoft applications that process VAT transactions. On this page you can define VAT defaults for bill sources, per VAT registration country and state. Clicking this link transfers you to PeopleSoft Financials, where you must set up your VAT billing.
Service VAT Treatment Defaults	Click to access the Service VAT Treatment Drivers Setup page, which is a common page used to set up VAT services treatment for all PeopleSoft applications that process VAT transactions. If you are required to implement special handling for services, you can specify VAT service treatment defaults for bill sources on this page for a supplier's (seller's) location country and state. Clicking this link transfers you to PeopleSoft Financials, where you must set up your VAT billing.

Item Type

Inventory Item	Select if the item is physically stocked in inventory. You cannot create transactions in PeopleSoft Inventory for noninventory items.
Non-Owned Item	Select if the item is non-owned. PeopleSoft Inventory does not create accounting entries for non-owned item transactions. If you define an item as non-owned, you must also specify a stock type.
Consigned	Select if the item is consigned. Only non-owned items can be consigned.

Note. After an order for the item is initiated from the RMA component or the Order Materials component, the system does not enable values in the Item Type group box to be modified.

Item Tracking

Lot Control	<p>Select if the item is tracked by lot ID.</p> <p>In PeopleSoft Integrated FieldService, you must enter the lot ID for transactions of lot-controlled items that are initiated on the Order Materials page and when defining installed product records for lot-controlled items on the Installed Product and Services component. You also specify the lot ID on the Time Material Expense page on the service order.</p> <p>In PeopleSoft Support, you may enter the lot ID for advanced exchange RMA transactions of lot-controlled items; however, it is not required.</p> <p>In PeopleSoft Inventory, you must enter the lot ID at the time of receipt and putaway and for all inventory movement transactions of lot-controlled items.</p>
Serial Control	<p>Select to track each unit of the item in stock by a unique identifier. Serial-controlled inventory items are managed in units of one, based on the item's standard UOM.</p> <p>In PeopleSoft Integrated FieldService, you must enter the serial ID for transactions of serial-controlled items that are initiated on the Order Materials page and when defining installed product records for serial-controlled items on the Installed Product page.</p> <p>You also specify the serial ID on the Time Material Expense page on the service order.</p> <p>In PeopleSoft Support, you must enter the serial ID for advanced return RMA transactions of serial-controlled items.</p> <p>In PeopleSoft Inventory, you must enter the serial ID at the time of receipt and putaway and for all inventory movement transactions of serial-controlled items.</p>
Shipping Serial Control	<p>Select to assign a unique identifier to each unit of the item if serial tracking is required only at the time of shipment. Until ship-serial-controlled items are shipped, you can move them to different stock locations within the PeopleSoft Inventory business unit without serial control, which simplifies transaction processing and entry.</p> <p>Serial numbers are then assigned at the time of shipment to provide tracking on products shipped to customers, internal locations, and other PeopleSoft Inventory business units.</p>

When a user records the quantity received, used, not used, and removed for a ship-serial-controlled item on the Order Materials page in PeopleSoft CRM, you must enter the ship-serial ID. The system uses this ID to accurately update the customer's installed product record.

Note. The reporting of materials used and removed can also be completed on the Time Material and Expense page.

Note. After an order for the item is initiated from the RMA Form component or the Order Materials component, the system does not enable values in the Item Tracking group box to be modified.

Item Usage

Serviceable

Select if a service can be performed on the item. You create services and service orders only for items that are serviceable. You specify products and installed products on the service order and items when you are ordering, receiving, using and removing materials.

Note. PeopleSoft recommends that you only create services and service orders for items that are serviceable.

Returnable

Select if the item can be returned. This data is for informational purposes only.

The removal of a nonreturnable item on the Time Material Expense page on the service order does not trigger any inventory adjustment transactions.

The system issues a warning if you try to return an item that is not identified as returnable using the RMA Form component. You can select to cancel or proceed with the transaction.

Consumable

Select if the item can be scrapped rather than returned. When the removal of a consumable item is recorded on the service order component, the system does not trigger any inventory adjustment transactions. However, the system updates the customer's installed product record to reflect the removal of the installed item.

Note. In the RMA Form, Service Order and Order Materials components, you can select items regardless of the *Serviceable*, *Returnable*, and *Consumable* check box settings.

Product Options

When you create a new item or select an item with a current status of *Under Initialization*, the system displays the Product Options group box to establish whether a corresponding product definition should be created simultaneously with the item definition.

Create Product

Select to create a corresponding product definition for this item.

Use Item ID

Select to make the product ID the same as the item ID. If selected, the Product ID field becomes unavailable for entry.

Product ID

Enter the ID for the product definition. If you set up automatic numbering for products, enter a value of *NEXT* to use the next available product ID.

Product Type Enter the type of product. Delivered types include *Engagement Service*, *Package Product*, *Service Agreement*, *Service Product*, *Standard Product*, and *Subscription Product*.

Configuration Options

If your implementation includes the PeopleSoft Advanced Configurator product, define the configuration attributes for the item in the Configuration Options group box. The PeopleSoft CRM system supports two configurator products: PeopleSoft Advanced Configurator and PeopleSoft Sales Product Configurator.

Fields in this group box change dynamically depending on which configurator product is installed in the system (the information is available in General Options page under Set Up CRM, Installation Options).

If PeopleSoft Advanced Configurator is installed, the Configured and Schema fields appear. If PeopleSoft Sales Product Configurator is installed, the Configured, Distribution Model, Configuration Code Generation, and Template fields appear.

Note. All of the fields in the Configuration Option section can be modified on the CRM side even if the Item Enterprise Integration Points are active.

Configured	Select if one of the PeopleSoft configurator products can configure the item.
Schema	Enter a schema to be used for the configuration of the item. This field applies only to PeopleSoft Advanced Configurator.
Distribution Model	Enter a model to be used for the configuration of the item. This field applies only to PeopleSoft Sales Product Configurator.
Configuration Code Generation	Select to generate configuration codes automatically based on the specified template. This field applies only to PeopleSoft Sales Product Configurator. You cannot change an item's configuration options to use configuration codes if there is activity in the system for the item (such as inventory balances, customer orders, and so forth).
Template	Enter the name of the template that is used to generate configuration codes. This field applies only to PeopleSoft Sales Product Configurator.

See *PeopleSoft Enterprise Advanced Configurator 9 PeopleBook*.

Warranty Information

Warranty Name	Enter the warranty that is associated with the item. Establish warranties on the Warranty page.
Status	Select the current status of the warranty. Values are <i>Active</i> and <i>Inactive</i> .

Note. An item can have only one active warranty associated with it.

See Also

Chapter 4, “Defining Items,” *Understanding Item Definition in PeopleSoft CRM*, page 23

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Setting Up and Managing Agreements and Warranties”

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “Managing Material Returns,”
Understanding Material Return Processing

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Ordering and Receiving Materials”

Chapter 10, “Tracking Installed Products and Assets,” *Understanding Installed Products*, page 113

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Setting Up Services”

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Creating and Managing Service Orders”

PeopleSoft Enterprise Inventory PeopleBook

Establishing Substitute Definitions

Access the Substitutes page.

Item Definition

Save | Search | Add Item Definition | Next | Previous | Personalize

Item ID 10000 **SetID** SHARE
Description Long Sleeve Biking Jersey, Men's **Current Status** Active
Item Group Apparel **Family** Common

Item Definition | **Item Substitutes**

Substitute Items Customize | Find | First 1 of 1 Last

*Priority	*Substitute Item ID	Description	From Date	*To Date	Rate	Use for Shipments
1	10002	Long Sleeve T-Shirt, Mens	07/26/2006	12/31/2099	1.00000000	<input type="checkbox"/>

Substitutes page

Substitute Items

Priority

Enter a priority value for each substitute item that you add. The substitute item with the highest priority (the lowest number) should be the first choice when substitutions are made. Though priority doesn't need to be sequential, it must be greater than 0.

From Date

Enter the date on which the substitute item becomes a valid substitution option. The default is the current date.

To Date

Enter the date on which the substitute item is no longer a valid substitution option. The default is December 31, 2099.

Rate

Enter the quantity of the substitute item that is required to replace the original item. The default conversion rate is 1. Conversion rates are calculated using the item's standard UOM.

Use for Shipments

Select if the substitute item is valid for material stock requests during the picking process in your inventory system.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Ordering and Receiving Materials”

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “Managing Material Returns,”
Understanding Material Return Processing

Associating Items with Additional UOMs

To associate items with additional UOMs, use the Unit of Measure (INV_ITEM_UOM) component.

You can define additional UOMs for item transactions. For example, suppose that you order an item by the case but ship it in individual units, you need two additional UOMs: a shipping UOM (each), and an ordering UOM (case). When multiple UOMs apply to a given item, PeopleSoft maintains conversion rates to facilitate processing.

This section discusses how to add UOMs.

Note. When you define an item in the Item Definition component in PeopleSoft CRM, the system automatically inserts a row into the Units of Measure table with the standard UOM set up as a valid ordering, stocking, and shipping UOM.

Page Used to Associate Items with Additional UOMs

Page Name	Object Name	Navigation	Usage
Units of Measure	INV_ITEM_UOM	Items CRM, Units of Measure, Unit of Measure	Add UOMs to an item.

Adding UOMs

Access the Unit of Measure page.

Unit of Measure

Item ID 10009 Air Cond, Compressor

Convert To

Standard Unit of Measure EA Each

Convert From Find | View All First 1 of 1 Last

*Unit of Measure EA Each

*Conversion Rate 1.00000000

*Quantity Precision Whole Nbr

Default Stocking UOM

Rounding Rule + -

Natural Round

Round Up

Unit of Measure Type View All 1-3 of 3

Ordering + - Select All

Shipping + - Deselect All

Stocking + -

Weight

Shipping Weight Weight UOM

Unit of Measure page

In PeopleSoft Order Capture, the system prompts for product UOMs that are defined as valid ordering UOMs. In PeopleSoft Integrated FieldService and Support all item transactions are performed using the item's standard UOM.

Convert To

This group box displays the standard UOM that you define for this item on the Item Definition page.

Convert From

Unit of Measure

Enter a UOM that is also used for transactions involving this item. You establish UOMs under Set Up CRM, Common Definitions, Units of Measure, Units of Measure.

Note. In PeopleSoft Integrated FieldService, the system uses the item's standard UOM for all item transactions initiated from the Order Materials and Service Order component. Similarly, in PeopleSoft Support, the system uses the item's standard UOM only for RMA and replacement transactions initiated from the RMA Form component.

Conversion Rate

Enter the conversion rate between the standard UOM (in the Convert To group box) and the UOM (in the Convert From group box). If you have specified the conversion rate between these two UOMs under Set Up CRM, Common Definition, Units of Measures, the CRM system populates the value automatically when you specify the UOM (in the Convert From group box).

To determine the conversion rate to enter, consider the relationship between the standard UOM and this new UOM. For example, suppose that the standard UOM for the item is EA (each) and this newly added UOM is CS (case), and

one CS of the item contains 5 EA items, enter 5 as the conversion rate. The value's format gets updated after you save the record.

Quantity Precision

Select how calculated or user-entered quantities should be presented in the system, as decimal (up to four decimal places) or whole number.

This field applies to PeopleSoft SCM.

Default Stocking UOM

Select if this unit of measure is the default stocking UOM. This field applies only to PeopleSoft SCM.

When you assign UOMs to an item on the Units of Measure page, you indicate whether each UOM is valid for ordering, shipping, or stocking transactions. If more than one UOM is valid for stocking, specify which of these should be the default stocking UOM.

Rounding Rule

These fields apply only to PeopleSoft SCM.

Unit of Measure Type

Select the kinds of transactions that use the selected UOM. You must select at least one UOM type for each item.

Ordering

Select if the UOM is used for stock requests or for express issue transactions in PeopleSoft Inventory. Order Management also uses the ordering UOM. In Order Capture, the system prompts for product UOMs that are defined as valid ordering UOMs.

Shipping

Select if the UOM is used for shipping and issues transactions in PeopleSoft Inventory.

Stocking

Select if the UOM is used for putaway or receiving transactions in PeopleSoft Inventory. You can also use this UOM for numerous other transactions in PeopleSoft Inventory, including transfers, container management, adjustments, picking, and physical accounting.

Select All and Deselect All

When you first define an item-UOM combination, only one field appears in the Unit of Measure Type group box. If the selected UOM is valid for all transactions involving this item, click the Select All button.

If the selected UOM is no longer valid for a given transaction, click the Deselect All button to clear the UOM type fields, then insert valid transactions.

To associate the item with additional units of measure, add rows using the Add a new row button to the right of the Unit of Measure Type group box.

Weight

PeopleSoft Order Capture uses the Shipping Weight and Weight UOM fields to calculate shipping costs when it is integrated with a third-party freight calculator software (for example, ConnectShip).

See Also

Chapter 7, “Setting Up Products,” page 57

Chapter 4, “Defining Items,” Associating Items with Additional UOMs, page 36

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Ordering and Receiving Materials”

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “Managing Material Returns,”
Understanding Material Return Processing

PeopleSoft Enterprise Managing Items PeopleBook

CHAPTER 5

Working with Item Assemblies

This chapter provides an overview of item assemblies and discusses how to:

- Define item assemblies.
- View assembly information.

Understanding Item Assemblies

Item service assemblies identify the components of an item that an organization can service or support. Once defined, technicians or call center agents can use the Review Assemblies component to reference the service assembly definition and help drive troubleshooting and service activities.

For every item within a setID in the system, you can define serviceable component items. You can also define service assemblies for a component item, creating service assemblies with multiple levels. Before you can define a service assembly, however, you must define the item and all of its component items.

For each assembly within a setID, you can define multiple versions using assembly codes. For example, suppose that you have a radio that is sold and serviced in the U.S. and Great Britain. You can define two assembly codes to reflect the radio's different power supply components.

In addition to identifying serviceable components for an item, technicians and call center agents can use service assemblies to check for manufacturers' warranties on the component parts of an item that is installed at the customer's site. In PeopleSoft Customer Relationship Management (PeopleSoft CRM), you can activate warranties that you offer for installed products; however, this warranty information is for the end item itself on the installed product record, not for any component items. You can check for warranties that you offer for the component item on the Review Assemblies - Components page.

See Also

[Chapter 4, "Defining Items," page 23](#)

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Setting Up and Managing Agreements and Warranties"

Defining Item Assemblies

To define assembly items, use the Assemblies Maintenance (BOM_MAINTENANCE) component.

This section lists common elements and discusses how to:

- Specify assembly components.

- Describe the service assembly and record notes.
- Define component details.
- Add notes to the assembly definition.

Common Elements Used in This Section

Op Seq (operation sequence) Enter the sequence in which the component is assembled. This value is informational in PeopleSoft CRM. Operation sequence is used primarily in PeopleSoft Manufacturing environments.

Quantity and Per Enter the quantity of the component that is required for each assembly or order of the end item, in the item's standard unit of measure (UOM) that you define for the component item. The quantity is used primarily in PeopleSoft Manufacturing environments.

Pages Used to Define Item Assemblies

Page Name	Object Name	Navigation	Usage
Assemblies - Summary	EN_BOM_MAINT	Items CRM, Assemblies, Summary	Define and maintain the serviceable components for a given combination of setID and item.
Assemblies - Assembly	EN_BOM_TEXT	Items CRM, Assemblies, Assembly	Describe the service assembly and record any applicable notes.
Assemblies - Components	EN_COMP_MAINT	Items CRM, Assemblies, Components	View or modify details about each assembly component.
Assemblies - Component Notes	EN_COMP_TEXT	Items CRM, Assemblies, Component Notes	View or record notes that relate to a specific component on a service assembly.

Specifying Assembly Components

Access the Assemblies - Summary page.

Summary		Assembly		Components		Component Notes	
SetID CRM01				<input checked="" type="checkbox"/> Serial Control			
Item ID SR1003				Item Description 12000 BTU Room Air (Light Beige)			
Type Service				Assembly Code 1			
Assembly Qty 1				EA			

Component								Customize	Find	View All	First	1-6 of 6	Last
*Component ID	Description	Op Seq	*Effective Date	*Obsolete Date	Quantity	UOM	*Per						
10009	Air Cond, Compressor	10	02/16/2004	02/16/2004	1.0000	EA	ASY						
10010	Air Cond, Fan	20	02/16/2004	02/16/2004	1.0000	EA	ASY						
10011	Air Cond, Control Unit	30	02/16/2004	02/16/2004	1.0000	EA	ASY						
10012	Air Cond, Air Handler Duct	30	02/16/2004	02/16/2004	1.0000	EA	ASY						
10013	Air Cond, Pipes	40	02/16/2004	02/16/2004	1.0000	EA	ASY						
10014	Air Cond, Ducts	40	02/16/2004	02/16/2004	1.0000	EA	ASY						

Assemblies - Summary page

Assembly Qty (assembly quantity)

Enter the end item quantity in the item’s standard UOM as you defined it on the Item Definition page. In general, set the assembly quantity to 1 and enter the component quantity that is included in one unit of the end item. However, if you typically install and service the end item in quantities greater than one, you might define a service assembly in terms of the normal installation and service quantity.

For example, a manufacturer and distributor of speakers might produce and stock speakers in inventory as single units. Yet because a customer always buys at least two speakers at a time, the speaker company might choose to set up a service assembly with an assembly quantity of two.

Component ID

Select a service assembly component. You must establish the component as an active item using the Item Definition page or the Item Master enterprise integration point. In addition, the component item must conform to these restrictions:

- The component item cannot be the same as the end item.
- The effectivity period, which the effective and obsolete dates specify for the component, cannot overlap with other rows for the same component ID.

See Also

Chapter 4, “Defining Items,” page 23

PeopleSoft Enterprise Manufacturing PeopleBook, “Understanding PeopleSoft Enterprise Bills of Material and Routings”

Describing the Service Assembly and Recording Notes

Access the Assemblies - Assembly page.

Summary	Assembly	Components	Component Notes
SetID CRM01 Item ID SR1003 Type Service Assembly Qty 1 EA		<input checked="" type="checkbox"/> Serial Control Item Description 12000 BTU Room Air (Light Beige) Assembly Code 1	
Assembly Details			
Description Room Air Conditioner Short Description Air Con Assembly Note Make sure power is turned off on G453WN unit			

Assemblies - Assembly page

Use the Assembly Details section of this page to describe any appropriate details of the assembly and any notes that may apply.

Defining Component Details

Access the Assemblies - Components page.

Summary	Assembly	Components	Component Notes
SetID CRM01 Item ID SR1003 Type Service Assembly Qty 1 EA		<input checked="" type="checkbox"/> Serial Control Item Description 12000 BTU Room Air (Light Beige) Assembly Code 1	
Component			
*Component ID 10009 Operation Sequence 10 Quantity 1.0000 EA		Description Air Cond, Compressor *Per ASY	

Assemblies - Components page

Component ID

Select a service assembly component. The system automatically populates the description of the component item.

See Also

PeopleSoft Enterprise Manufacturing PeopleBook, "Understanding PeopleSoft Enterprise Bills of Material and Routings"

Adding Notes to Assembly Definition

Access the Assemblies - Component Notes page.

The screenshot displays the 'Assemblies - Component Notes' page. At the top, there are tabs for 'Summary', 'Assembly', 'Components', and 'Component Notes'. The main area shows the following information:

- SetID:** CRM01
- Item ID:** SR1003
- Type:** Service
- Assembly Qty:** 1 (with 'EA' unit)
- Serial Control:**
- Item Description:** 12000 BTU Room Air (Light Beige)
- Assembly Code:** 1

Below this is a 'Component' section with a search bar and navigation controls. The component details are:

- *Component ID:** 10009
- Description:** Air Cond, Compressor
- Operation Sequence:** 10
- Component Note:** ABC Inc. offers a warranty on a component item

Assemblies - Component Notes page

If a manufacturer or another third party offers a warranty on a component item, you can note it on this page.

Viewing Assembly Information

To view assembly information, use the Assemblies Inquiry (BOMINQUIRY) component.

This section lists common elements and discusses how to:

- Search for item assemblies.
- View component detail and warranty information.

Common Elements Used in This Section

Quantity and Per

Displays the quantity of the component that is required for each assembly or order of the end item, in the item's standard UOM that you define for the component item.

Pages Used to View Assembly Information

Page Name	Object Name	Navigation	Usage
Review Assemblies - Summary	EN_BOM_INQUIRY	Items CRM, Review Assemblies, Summary	View the serviceable components that are defined for a given combination of setID and item.
Review Assemblies - Assembly	EN_BOM_INQ_HEADER	Items CRM, Review Assemblies, Assembly	View a description of the service assembly and any recorded notes.
Review Assemblies - Components	EN_BOM_INQUIRY_D	Items CRM, Review Assemblies, Components	View details about each component in the assembly.
Review Assemblies - Component Notes	EN_BOM_INQ_D_TXT	Items CRM, Review Assemblies, Component Notes	View notes that are related to a specific component on a service assembly.

Searching for Item Assemblies

Access the Review Assemblies - Summary page.

Summary | Assembly | Components | Component Notes

SetID: CRM01 As of Date: 03/31/2004

*Item ID: SR1003 Item Description: 12000 BTU Room Air (Light Beige)

*Assembly Type: Service *Assembly Code: 1

Depth: 1 Assembly Quantity: 1 EA

*Display: Non-Indented Show All Components

Search

Level	Component Code	Description	Effective Date	Obsolete Date	Quantity	UOM	Per	Serial Control
1	10009	Air Cond, Compressor	02/16/2004	02/16/2006	1.0000	EA	ASY	<input checked="" type="checkbox"/>
1	10010	Air Cond, Fan	02/16/2004	02/16/2006	1.0000	EA	ASY	<input type="checkbox"/>
1	10011	Air Cond, Control Unit	02/16/2004	02/16/2006	1.0000	EA	ASY	<input type="checkbox"/>
1	10012	Air Cond, Air Handler Duct	02/16/2004	02/16/2006	1.0000	EA	ASY	<input type="checkbox"/>
1	10013	Air Cond, Pipes	02/16/2004	02/16/2006	1.0000	EA	ASY	<input type="checkbox"/>
1	10014	Air Cond, Ducts	02/16/2004	02/16/2006	1.0000	EA	ASY	<input type="checkbox"/>

Summary | [Assembly](#) | [Components](#) | [Component Notes](#)

Review Assemblies - Summary page

Enter search criteria for the service assembly that you want to view.

SetID

Enter the setID of the service assembly. The system populates this value with the default setID that is associated with your user ID on the User Preferences - Overall Preferences page, if applicable.

As of Date	Enter the effective date of the service assembly. If you choose not to show all components, the system displays only the components that are defined for the service assembly that is in effect for this date.
Item ID	Enter the end item for which a service assembly has been defined.
Assembly Type	Select <i>Service</i> . Although other assembly types are available, only <i>Service</i> is applicable for PeopleSoft CRM applications.
Assembly Code	Enter the version of the service assembly that is defined for the setID and item combination. Assembly codes can range from 1 to 99.
Depth	Enter the component level of the service assembly. To view all levels, enter 99.
Display	Select the formatting method to display the service assemblies. Values are: <i>Indented</i> : Select to display the service assembly components with each level indented relative to the previous level. If you select a depth greater than 1, the system automatically sets this value. <i>Non-Indented</i> : Select to display the service assembly components as a simple list without indentation.
Show All Components	Select to view all components that are defined for a service assembly regardless of the effective date.
Level Code	Displays the level of the component on the service assembly.
Component ID	Displays the item ID of each component. Click the item ID to access the Review Assemblies - Components page and view details, including warranty information, about the component item.

Viewing Component Detail and Warranty Information

Access the Review Assemblies - Components page.

Summary	Assembly	Components	Component Notes
SetID CRM01	As of Date 03/31/2004		
Item ID SR1003	Item Description 12000 BTU Room Air (Light Beige)		
Assembly Type Service	Assembly Code 1		
Depth 1	Assembly Quantity 1	EA	
Display Non-Indented	<input type="checkbox"/> Show All Components		
Component			
		Find View All	First <input type="button" value="◀"/> 1 of 6 <input type="button" value="▶"/> Last
Level Code 1	Item SR1003	Item Description 12000 BTU Room Air (Light Beige)	
Component ID 10009	Description Air Cond, Compressor	Quantity 1.0000	EA
Effective Date 02/16/2004	Per ASY	Op Seq 10	
Obsolete Date 02/16/2006			
Warranty Information			
		Find	First <input type="button" value="◀"/> 1 of 1 <input type="button" value="▶"/> Last
Warranty Name			
Status			
Summary Assembly Components Component Notes			

Review Assemblies - Components page

Component

- Level Code** Displays the level in the service assembly at which the component item is defined.
- Item** Displays the item ID and description.
- Op Seq (operation sequence)** Displays the sequence in which the component appears in the assembly structure.

Warranty Information

This section displays the warranty that you establish for the component item on the Item Definition page, if applicable.

See Also

[Chapter 4, “Defining Items,” page 23](#)

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Setting Up and Managing Agreements and Warranties”

CHAPTER 6

Checking Item Balances and Availability

This chapter provides an overview of balance inquiries and discusses how to view balance information.

Understanding Balance Inquiries

This section discusses:

- Item availability inquiries.
- Item balance inquiries by business units.
- Item balance inquiries by group members.

Item Availability Inquiries

If you integrate PeopleSoft Customer Relationship Management (PeopleSoft CRM) with PeopleSoft Inventory and you are accessing system pages through the portal using the single sign-on feature, links to the Item/Product Availability component in Inventory are available from the Order Materials and Service Order components in PeopleSoft Integrated FieldService and the Return Material Authorization component in PeopleSoft Support. With the Item/Product Availability component, you can confirm the current available quantity for an item, check cumulative available-to-promise quantity for future dates, and view future supply and demand information for the item.

To inquire item availability from the Return Material Authorization component for an advanced exchange return material authorization:

1. Click the View Related Links button in the Replacement Item(s) grid on the Return Material Authorization page.
2. Click the Item Availability link on the transfer page.

To inquire about item availability within PeopleSoft Integrated FieldService, click the Check Availability link adjacent to the Quantity in Truck on the Order Materials page and then click the Item Availability link on the transfer page.

You can also check availability from the Required Material page within a service order in PeopleSoft Integrated FieldService. Click the Check Availability link next to the Quantity in Truck then click the Item Availability link on the transfer page.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Ordering and Receiving Materials”

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “Managing Material Returns,”
Understanding Material Return Processing

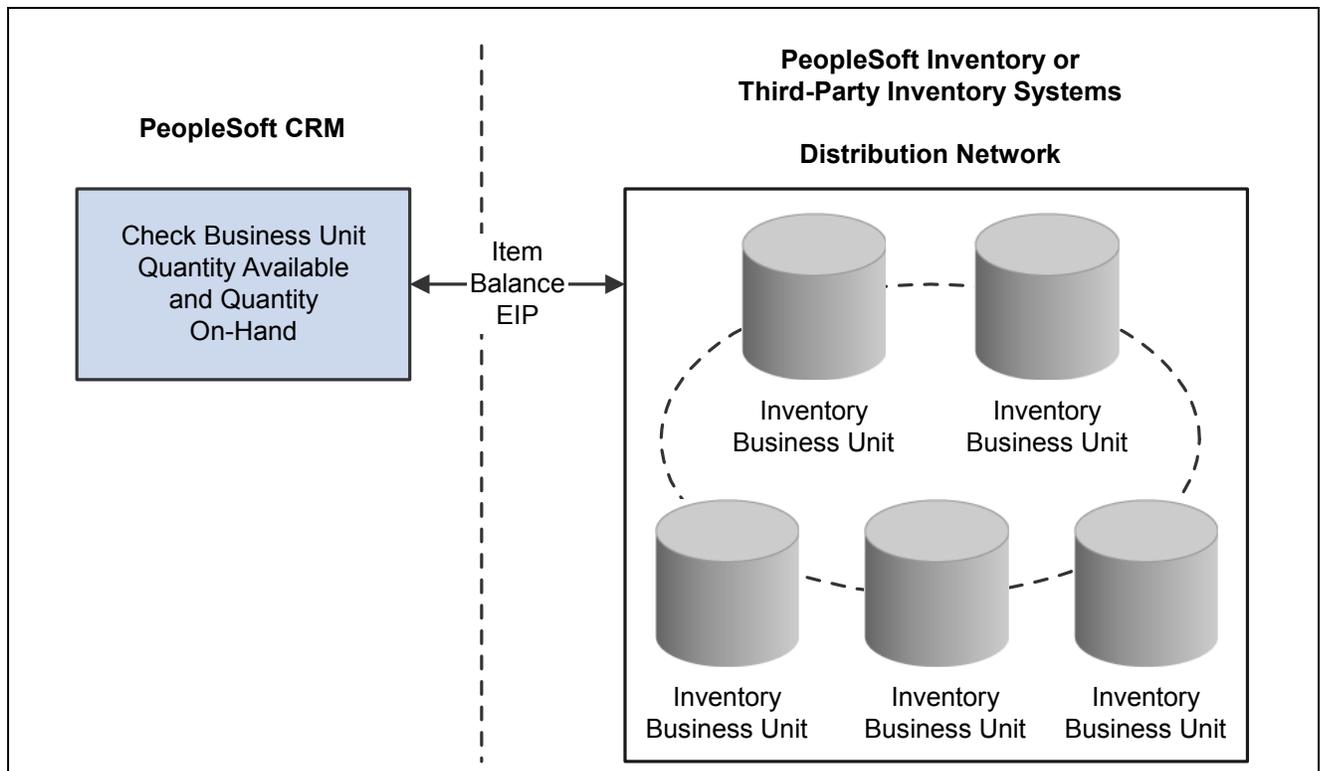
PeopleSoft Enterprise Inventory PeopleBook

Item Balance Inquiries by Business Units

PeopleSoft CRM uses the Item Balance enterprise integration point (EIP) to retrieve quantity available and on-hand balance information in real-time from the inventory business units that are included in the distribution network that is defined for customer support or field service operations. The sequence of business units reflects their order in the distribution network.

Note. When integrating with PeopleSoft Purchasing and Inventory, you define a distribution network of inventory business units for each business unit in PeopleSoft CRM that can request material for service orders or as replacements or exchanges for material returns.

This diagram illustrates the integration between PeopleSoft CRM and your inventory and procurement system that supports checking quantity that is available and on hand in the inventory distribution network:



Data flow from inventory systems to PeopleSoft CRM

See Also

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

Item Balance Inquiries by Group Members

In PeopleSoft Integrated FieldService, you can check item balances for the good truck stock storage locations that are associated with each group member in a provider group. You can use this balance information to select a group member to assign to a service order activity and to decide how much, if any, material must be ordered to complete the work on the service order activity.

PeopleSoft CRM uses the Item Balance EIP to retrieve balance information in real-time for the good truck stock storage locations that are associated with each member of the assigned provider group from PeopleSoft Inventory or a third-party inventory system. The balance information appears on the Item Balance by Group Member page in PeopleSoft CRM.

The system retrieves balance information only for group members who are associated with storage locations on the Storage Location page of the Worker component. This sequence of rules governs which group members' storage location balances the system retrieves:

1. If one or more group members are assigned to the service order activity, the system retrieves balance information for the group members that are assigned to the line.
2. If no group member is assigned to the service order activity but a provider group is specified, the system retrieves the balance information for all group members that are associated with the provider group on that activity.
3. If no group member or provider group is assigned at the activity level, the system displays an error message.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Understanding Inventory Storage Locations for Technicians”

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Ordering and Receiving Materials”

Viewing Balance Information

To view balance information, use the Order Materials (RF_MATERIAL_ORDERS) component and, in the Service Order Component, RF_SERVICE_ORDER.

This section lists common elements and discusses how to:

- Check item balances by inventory business units.
- Check item balances by group members.
- View error messages.

Common Elements Used in This Section



The Message Log button indicates that the system recorded in the Message Log an error that the Item Balance EIP encountered. Click the button to view the message on an Item Balance Message page.

Pages Used to View Balance Information

Page Name	Object Name	Navigation	Usage
Item Balance by Business Units	RF_STOR_LOC_RST	<ul style="list-style-type: none"> • From the Return Material Authorization page in PeopleSoft Support (select Support, Returns), click the View Related Links button following the Replacement Item ID field and then click the Item Balance link on the transfer page. • From the Required Material page within the service order in PeopleSoft Integrated FieldService, click the Check Availability link next to the Quantity in Truck field and then click the Item Balance by Business Units link on the transfer page. • From the Order Materials page, click the Check Availability link next to the Quantity in Truck field and then click the Item Balance by Business Units link on the transfer page. 	Check item balances for the inventory business units that are included in the distribution network that you define for customer support or field service operations.
Item Balance by Group Members	RF_STOR_LOC_RST	<ul style="list-style-type: none"> • From the Required Material page within the service order in PeopleSoft Integrated FieldService, click the Check Availability link next to the Quantity in Truck field and then click the Item Balance by Group Members link on the transfer page. • From the Order Materials page, click the Check Availability link next to the Quantity in Truck field and then click the Item Balance by Group Members link on the transfer page. 	Check item balances for group members of the assigned provider group.
Return Message from Inventory	RF_ITM_BAL_MSG1, RF_ITM_BAL_MSG2, RF_ITM_BAL_MSG3	Click the Message Log button on the Item Balance by Business Units page or the Item Balance by Group Members page.	View messages about problems that the PeopleSoft CRM system encountered when it attempted to retrieve item balance information from the inventory system with the Item Balance EIP.

Checking Item Balances by Inventory Business Units

Access the Item Balance by Business Units page.

Item Balances						
IN Unit	Short Description	Quantity Available	Quantity On Hand	Quantity Owned	UOM	
US201	APPL WHS1	0.0000	0.0000	0.0000	EA	
US202	APPL WHS2	100.0000	100.0000	100.0000	EA	

Item Balance by Business Units page

Note. This page is available only if you have implemented the Item Balance EIP to retrieve quantity balance information from PeopleSoft Inventory or a third-party inventory system.



Click the Message Log button to access the Return Message from Inventory page.

IN Unit (inventory business unit)

Displays the inventory business unit in the distribution network that is associated with support or field service activities. The sequence of the business units reflects their order in the distribution network.

Quantity Available

Displays a subset of the quantity on hand, which reflects the total item quantity that you can use to fulfill demand.

Quantity On Hand

Displays, in the total item quantity in a particular business unit, regardless of the stock's inventory status and storage location. The field value includes both the item quantity available and the quantity reserved.

Note. This total does not reflect the total item quantity that you can use to fulfill demand.

Quantity Owned

Displays, in the item's standard unit of measure, the amount of the item that the inventory business unit owns.

Depending on from where you navigated, these links can appear at the bottom of the page: Return to RMA, Service Order, and Order Materials. Click a link to return to the corresponding component.

Checking Item Balances by Group Members

Access the Item Balance by Group Members page.

Item Balance by Group Members							
SetID CRM01		Item ID 10000		Refrigerator, Plastic Bins			
Item Balances							Customi
	Provider Group Name	Group Member Name	IN Unit	Short Description	Quantity Available	UOM	Area
▼	APLW	John Turner	US200	CRM APPL	0.0000	EA	FRO
▼	APLW	Douglas Miller	US200	CRM APPL	0.0000	EA	TRK
▼	APLW	David Perry	US200	CRM APPL	0.0000	EA	TRK
▼	APLW	Mason Orellana	US200	CRM APPL	0.0000	EA	TRK
Service Order							

Item Balance by Group Members page

Note. This page is available only if you have implemented the Item Balance EIP to retrieve quantity balance information from PeopleSoft Inventory or a third-party inventory system.



Click the Message Log button to access the Return Message from Inventory page.

Provider Group Name

Displays the name of the provider group that is assigned to the service order activity.

Group Member Name

Displays the name of the group member that is assigned to the service order activity.

IN Unit (inventory business unit)

Identifies the inventory business unit where the group member’s truck stock storage locations are defined.

Quantity Available

Displays the amount of the item that is available to fulfill orders in the group member’s good truck stock storage location.

Area, Level 1, Level 2, Level 3, and Level 4

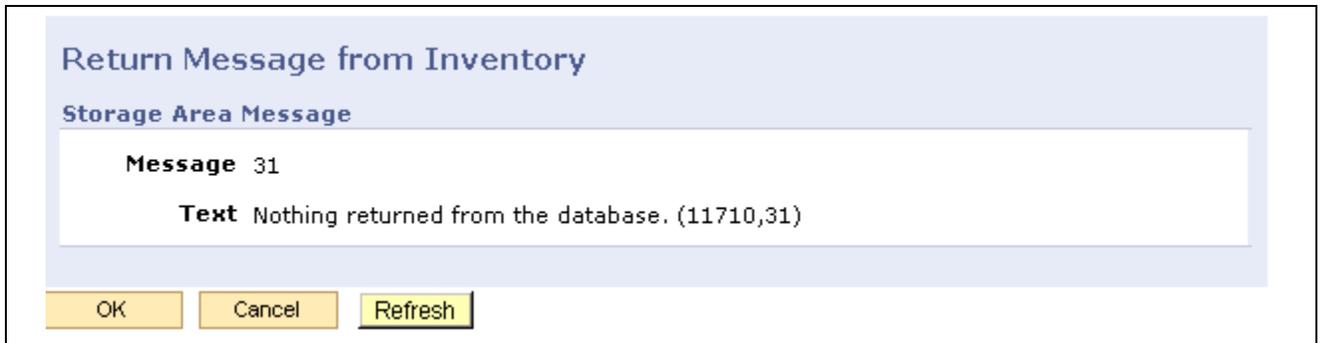
Displays the material storage area in PeopleSoft Inventory or the third-party inventory system that corresponds to the worker’s good storage location. You can define a storage location definition in an inventory system using a storage area and up to four levels representing a physical subdivision of the storage area, such as aisles, rows, shelves, and bins.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Understanding Inventory Storage Locations for Technicians”

Viewing Error Messages

Access the Return Message from Inventory page.



Return Message from Inventory page

Note. This page is available only if problems occur while retrieving balance information with the Item Balance EIP.

The Message Node (for Item Balance by Business Units) or Storage Area Message (for Item Balance by Group Members) group box displays information about errors with the Item Balance EIP process.

The return message is the message catalog number.

Typically, business unit errors indicate that the business unit has not been defined or the business unit-item combination is invalid in the inventory system. Storage area errors typically indicate that the storage location for the technician's truck stock has not been defined or the storage location-item combination is invalid in the inventory system.

CHAPTER 7

Setting Up Products

This chapter provides an overview of products in PeopleSoft CRM and discusses how to:

- Define products.
- Assign product units of measurement (UOMs).
- Define product package components.
- Establish product prices.
- Manage product relationships.
- Enter product notes.

Understanding Products in PeopleSoft CRM

This section discusses:

- Product definitions in PeopleSoft CRM.
- Integrations with PeopleSoft Supply Chain Management (PeopleSoft SCM) and PeopleSoft Proposal Management.

Product Definitions in PeopleSoft CRM

PeopleSoft CRM uses a product definition to represent each product. The product definition—which is keyed by product ID—stores all of the product information that company representatives require to sell or support the product. PeopleSoft CRM also uses product definitions for:

- Pricing product orders.
- Generating product catalogs.
- Storing product advisor scripts for use by sales and support personnel.

Product Definition Types

PeopleSoft CRM uses these types of product definitions:

- Standard product
- Package product
- Service agreement
- Service product
- Engagement service

- Subscription product

See [Chapter 2, “Understanding Products and Items in PeopleSoft CRM,” page 7.](#)

Product Definition Process

Follow these steps to define products in PeopleSoft CRM:

1. Analyze how the various parts of the CRM system use product definitions.
For example, the catalog generation process and the ordering process can both use product definitions.
2. Create definitional elements to associate with products.
Definitional elements are attributes such as product brands, product categories, and competency codes. You associate definitional elements with product IDs to create unique product and product package definitions.
See [Chapter 3, “Setting Up Product Definitional Elements,” page 11.](#)
3. Select a product type and create a product definition.
After you define a product, the product ID becomes available on product search lists so that you can access the product definition from other CRM pages.

Important! In PeopleSoft CRM, you can define a product when you define an item, or you can create a product and associate it with existing items. Typically, you begin by defining an item and having the system copy the item’s product ID, description, and standard UOM to the product definition table.

See [Chapter 4, “Defining Items,” page 23.](#)

4. Associate definitional elements and other product attributes with the product ID.
5. Select package components (if the product definition is for a product package).
6. Assign product UOMs.
7. Establish product prices.
8. Define relationships between products.
9. Associate notes with products.

Integrations with PeopleSoft SCM and PeopleSoft Proposal Management

Product information is integrated with PeopleSoft SCM (and third-party SCM systems) and PeopleSoft Proposal Management, which is part of the PeopleSoft Enterprise Services Automation product suite, by using enterprise integration points (EIPs). The considerations for using EIPs are discussed in the following paragraphs.

SCM Integrations

SCM systems use product definitions to manage products and product components throughout the manufacturing process. PeopleSoft CRM delivers several EIPs that maintain data integrity between PeopleSoft CRM and SCM systems—including PeopleSoft SCM and third-party systems—by synchronizing product data.

You integrate product data by using the PeopleTools Integration Broker. This technology enables both synchronous and asynchronous messages to be transmitted using one technology.

Note. To synchronize product groups that have product group types of *GEN* between your SCM and CRM databases, initiate the `PRODUCT_GROUP_FULLSYNC` EIP before initiating the `PRODUCT_FULLSYNC` EIP, regardless of whether PeopleSoft CRM is the publishing or subscribing database.

These EIPs are used for both publishing and subscribing:

- `PRODUCT_SYNC`
- `PRODUCT_FULLSYNC`
- `PRODUCT_SYNC_EFF`

Note. If the `PRODUCT_SYNC` message is active, an add, change, or delete action in the Product Definition component automatically executes the product sync publish logic.

PeopleSoft CRM publishes the `PRODUCT_SYNC` message whenever product data is added, changed, or deleted using the Product Definition - Definition page, the Package Components page, the Product Price page, the Package Component Pricing page, the Notes page, the Relationships component (`PROD_RELATIONS_CMP`), and the Product Unit of Measure page.

PeopleTools Integration Broker processes the message and applies a transformation to remove the `PRODKIT_HEADER`. Any package components that are themselves packages are also stripped from the message. Because PeopleSoft SCM does not permit packages within packages, package components that are themselves packages are also stripped from the message.

PeopleSoft CRM subscribes asynchronously to the `PRODUCT_SYNC` message that comes from the SCM system. This data is processed directly into the PeopleSoft CRM product tables using component interfaces. A product package header record is added for any kit components that are received from SCM. When a `PRODUCT_SYNC` or `PRODUCT_FULL_SYNC` message is received, the system runs the subscription logic, which calls one of these component interfaces depending on the content of the message:

- `PRODKIT_CI`
- `PRODKIT_COMPS_PRC_CI`
- `PROD_DEFN_CI`
- `PROD_NOTE_CI`
- `PROD_PRICE_CI`
- `PROD_RELATIONS_CI`
- `PROD_UOM_CI`

Note. Before publishing the Product full sync message, enter matching values in the product brand table (`PROD_BRAND_TBL`) using the Product Brand pages in CRM (Products CRM, Product Brand) and SCM (Set Up Financials/Supply Chain, Product Related, Order Management Foundation, Brand, Product Brand). If you don't enter values in the product brand table, the system may display an error message.

This table shows how an order represents packages to the PeopleSoft SCM system:

Type	Line Display	Line Data Model/EIP
0-Static Package (1-level static quantity) PROD_ITEM.PROD_KIT=Y PROD_KIT_HEADER.LT_CONFIG_FLAG=N	Display all components of the package as multiple lines.	Store and publish parent line.
1-Package (Kit) (multilevel dynamic quantity) PROD_ITEM.PROD_KIT=Y PROD_KIT_HEADER.LT_CONFIG_FLAG=Y	Display all components of the package as multiple lines.	Store all components as multiple lines, and publish as multiple lines.
2-Configured Package(Kit) PROD_ITEM.PROD_KIT=Y PROD_ITEM.CFG_KIT=Y	Display all components of the package as multiple lines.	Store all components as multiple lines, and publish as multiple lines.
3-Configured Product MASTER_ITEM_TBL.DIST_CFG_FLG=Y	Display high-level parent line.	Store and publish parent line plus configuration.

Proposal Management Integrations

PeopleSoft CRM can send information to PeopleSoft Proposal Management. This action occurs when a quote that originates from a PeopleSoft Sales lead or opportunity or is entered using PeopleSoft Order Capture includes an engagement service product. PeopleSoft Proposal Management prices the engagement and sends pricing information back to PeopleSoft CRM.

This integration consists of these application messages:

- OC_ESA_PROPOSAL

This message is sent to PeopleSoft Proposal Management when a quote is submitted for an engagement-type service in PeopleSoft Order Capture.

- OC_ESA_PROPOSAL_RESPONSE

This message returns the capture ID, proposal ID, and version ID from PeopleSoft Proposal Management to PeopleSoft Order Capture.

- ESA_PROPOSAL_PRICE

When PeopleSoft Proposal Management completes pricing the engagement, pricing information is sent back to PeopleSoft Order Capture.

- OC_ESA_PROPOSAL_STATUS

This message sends the status of a proposal (for example, draft or negotiated) to PeopleSoft Proposal Management.

Important! Before you can integrate with PeopleSoft Proposal Management, you must define the Engagement Service product.

See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*.

Defining Products

To define products, use the Product Definition (PROD_DEFN) component.

This section discusses how to:

- Define product information.
- Define external product descriptions.
- Define actions for a product.
- Define product attributes.
- Attach files to product definitions.
- Define installed product rules.
- Attach images to product definitions.
- Associate branch scripts with products.
- Add products to product groups.
- Define product availability for regions.
- Track competing products.
- Enter sub business projects.

Note. You can now set up pricing for metallic numbers. Vanity or metallic phone numbers are phone numbers that are easy to remember. For example, 800 777-1234. In Europe, these numbers are typically called metallic numbers.

Pages Used to Define Products

Page Name	Object Name	Navigation	Usage
Product Definition - Definition	PROD_DEFN	Products CRM, Product Definition, Definition	Define product information.
Product Definition - External Description	PROD_EXT_DESCR	Products CRM, Product Definition, External Description	Define a product's external description.
Product Definition - Actions	RBT_PROD_ACTION	Products CRM, Product Definition, Actions	Define actions that occur during the life cycle of a product.
Product Definition - Attributes	RB_ATTR_RUN_PROD	Products CRM, Product Definition, Attributes	Define product attributes such as dimensions, materials used in manufacturing, and color.
Product Definition - Attachments	PROD_ATT	Products CRM, Product Definition, Attachments	Attach files to a product.
Product Definition - Installed Product	PROD_INSTALL	Products CRM, Product Definition, Installed Product	Define rule sets for processing installed products.
Product Definition - Product Groups	PROD_GROUP_LNK	Products CRM, Product Definition, Product Groups	Add products to product groups.
Product Definition - Images	PROD_IMAGES	Products CRM, Product Definition, Images	Attach images of different sizes to a product.
Product Definition - Branch Scripts	PROD_BSCRIPT	Products CRM, Product Definition, Branch Scripts	Associate a branch script with a product.
Product Definition - Regions	PROD_REGION	Products CRM, Product Definition, Regions	Define sales regions for products.
Product Definition - Competitors	PROD_COMPTRRS	Products CRM, Product Definition, Competitors	Track competitors' products.
Sub Business Projects	RBT_PROD_BUSPRJ_PG	Products CRM, Product Definition, Sub Business Projects	Enter business projects that are associated with the product.

Defining Product Information

Access the Product Definition - Definition page.

Save Refresh

Product 3G Prepaid Wireless Services **Product ID** TEL000022
Product Type Service **SetID** COM01

Definition External Description Actions Attributes Attachments Installed Product

Product Details

*Name 3G Prepaid Wireless Services *Status Active
 Model Number Brand
 Catalog Number Category
 Long Description 3G Prepaid Wireless Services

Order Standalone By

Business Consumer

Service Information

Service Feature
 Service Required
 Service ID

Billing Account Type

Prepaid Only
 Postpaid Only
 Either

Communication

SIM Number required
 Phone Number required
 Number Type
 Line Usage

Product Definition - Definition page (1 of 2)

Tax Parameters

Transaction Type Tax Group
 Sub Type

Lead Time

Lead Time 0

Duration

Duration Frequency

Go to: [Product Relationships](#)

Product Definition - Definition page (2 of 2)

Note. Slightly different views of this page appear depending on the product type that you select when you add the product definition. The display template that you associate with the product type controls the appearance of the page.

See Chapter 7, “Setting Up Products,” *Product Definitions in PeopleSoft CRM*, page 57 and *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Configuring Display Templates”.

Product Details

This information identifies the product, and it appears for all product types. The specific fields that appear vary depending on the requirements of the product type. For example, engagement services do not have a catalog number, model number, brand, or category.

Model Number and Catalog Number Enter the product catalog number and model number if a product appears in another vendor catalog.

Order Standalone By

This group box appears for all product types.

Business Select if the product is available as a standalone product (not part of a package) to businesses.

Consumer Select if the product is available as a standalone product to consumers.

Note. If you do not select either of these options, the system treats the product as one that is available only as a package component.

Service Information

Service Feature Select if the service is a feature that enhances the main product or service. For example, related service features for wireless service might include caller ID and call waiting.

Service Required Select if a service is required to install the product. The system makes the Service ID field available to allow you to select an appropriate service.

Service ID Select the ID of the service that would be used to install the product. You can define services using the Services component. Select Set Up CRM, Product Related, FieldService.

Billing Account Type Select either *Prepaid Only*, *Postpaid Only*, or *Either* to indicate the method by which the product can be purchased.

Note. The system displays this section for communication services only.

Communication

SIM Number Required: Select if the service requires a SIM (Subscriber Identity Module) A SIM is a smart card inserted into GSM phones that contain telephone account information. *GSM* is a wireless network standard in Europe.

Phone Number Required: Select if the service requires a phone number. You must also select a value for the Line Usage field.

Number Type: Select either *Wire Line Number* or *Wireless Number* to indicate the type of number required for the service.

Line Usage: Select either *Data Line*, *Fax Line*, or *Voice Line* to indicate how the line will be used.

Note. The system displays this section for communication services only.

Pricing

For packages, indicate the pricing method. This information appears for package products.

at Top Level Select to use the price that is defined on the Product Price page for the package price.

at Component Level Select to calculate the package price as the sum of the prices for each component in the package.

Note. When you select the at Component Level option, define the price for each component of the package using the Package Component Pricing page.

Regardless of the pricing option that you select, the total price for the product package is stored in the PROD_PRICE record.

Configuration Information

If the implementation includes PeopleSoft Advanced Configurator, the check boxes in the Configured Packages group box define the configuration attributes for the product. This group box appears for products of type *Package*.

Configured Package Select if the product is a fully configured package. A fully configured package uses the product configurator at runtime and creates a package based on the selections for the configurator model.

Schema Select the configuration schema that is used to configure the package.
A configuration schema establishes the display, pricing, and configuration details for a specific configuration and what information to retrieve from the configuration models on the Configurator Server.

Template Enter the name of the agreement template that is used to record the service agreements for a service product.

Examples of service product agreements include maintenance and repair agreements, product support agreements, cleaning service agreements, and replacement warranties.

See *PeopleSoft Enterprise Advanced Configurator 9 PeopleBook*, “Product Modeling with a Component Model”.

Lead Time

Future order functionality enables a user to place an order or a service management request that will occur in the future. The future dated orders are queued in the CRM system and automatically resubmitted to fulfill the order or request. This approach improves performance by not submitting orders until they are due.

See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Working with Future Dated Orders and Temporary Services”.

Lead Time Enter a duration of time that future dated orders will be fulfilled. By default, the duration is calculated in days.

Inventory

This group box appears only for products of type *Standard*.

Item ID Enter an item ID to associate with the product. If you created the product from an item, the item ID on the Item Definition page appears here.

If the specified item is associated with configuration, the standard product can be configured through its product definition.

Note. Clear the Item Required check box on the Product Options page to save products without an item ID.

Agreements

This group box appears only for products of type *Service Agreement*.

Template ID Enter the name of the agreement template that defines the service agreement.

Tax Parameters

This group box appears for products of types *Service* and *Service Agreement*. The information that you enter in this group box determines how the service is classified for tax purposes.

Duration

This group box appears for products of type *Service* and enables you to enter the duration and frequency of the service.

See Also

[Chapter 7, “Setting Up Products,” Establishing Product Prices, page 76](#)

[Chapter 3, “Setting Up Product Definitional Elements,” Creating Product Definitional Elements, page 12](#)

Defining External Product Descriptions

Access the Product Definition - External Description page.

Product Definition - External Description page

External Description and Long External Description Enter short and long external descriptions for the product. The text can include any HTML tags except:

- <html> and </html>
- <title> and </title>
- <header> and </header>
- <body> and </body>

These main structure tags are unnecessary because they are included in the standard PeopleSoft-generated page.

Note. Be sure that the HTML code follows proper HTML formatting rules.

Preview

Click to preview the short and long descriptions.

Defining Product Actions

Access the Product Definition - Actions page.

The screenshot displays the 'Product Definition - Actions' page. At the top, there are 'Save' and 'Refresh' buttons. The page header shows 'Product Digital Wireless Package' and 'Product ID TEL200001'. Below the header, there are tabs for 'Definition', 'External Description', 'Actions', 'Attributes', 'Attachments', and 'Installed Product'. The 'Actions' tab is selected. On the left, a 'Hierarchy' tree lists various product components, such as 'Any Time Minutes', 'Weekend Minutes', and 'Mobile to Mobile Minutes'. On the right, a table titled 'Actions' lists available actions for the product. The table has columns for 'Enable', 'Action Name', and 'Lead Time'. The actions listed include 'ADD', 'CHANGE ATTRIBUTE', 'CHANGE FEATURES', 'Cancel Service', 'Change End Date', 'Change Resume Date', 'LOOP TEST', 'REMOVE', 'Renew Service', and 'Suspend / Resume Service'.

Enable	Action Name	Lead Time
<input type="checkbox"/>	ADD	<input type="text"/>
<input type="checkbox"/>	CHANGE ATTRIBUTE	<input type="text"/>
<input type="checkbox"/>	CHANGE FEATURES	<input type="text"/>
<input type="checkbox"/>	Cancel Service	<input type="text"/>
<input type="checkbox"/>	Change End Date	<input type="text"/>
<input type="checkbox"/>	Change Resume Date	<input type="text"/>
<input type="checkbox"/>	LOOP TEST	<input type="text"/>
<input type="checkbox"/>	REMOVE	<input type="text"/>
<input type="checkbox"/>	Renew Service	<input type="text"/>
<input type="checkbox"/>	Suspend / Resume Service	<input type="text"/>

Product Definition - Actions page

This page enables you to add actions to a product and view the actions for the product. The actions that are available are determined by setID.

Hierarchy

This portion of the page shows the product package and its components. Clicking these links enables the user to upgrade, downgrade, or remove the component for that customer based on business rules.

Components

This portion of the page changes based on the component selected. Initially, the page shows the actions available for the product package. When selecting a package component, the service features and available actions appear.

Defining Product Attributes

Access the Product Definition - Attributes page.

Product Definition - Attributes page

Order Capture Attributes

Select an option for the processing of order capture line attributes. The PeopleSoft Order Capture application uses these options to determine how it processes line attributes. Setting either the *Never has Attributes* or the *Always has Attributes* option increases performance because the attributes engine does not need to check for attributes when these options are set.

This field is not required. If left blank, *Conditionally has Attributes* is assumed to provide backward compatibility with existing functionality.

Possible values are:

- *Never has Attributes*

Use this setting to indicate that product does not have order capture line attributes. Because attributes are never collected at order processing time for this product when this option is set, Order Capture performs better because it does not need to do the attributes calculation for the product. This increases response times when adding a product to an order and opening up existing orders.

- *Always has Attributes*

Use this setting if the product has order capture line attributes. Attributes are always collected at order processing time for this product.

- *Conditionally has Attributes*

Use this setting if the product sometimes has order capture order line attributes. Attributes are collected at order processing time under certain conditions that are based on the values of the order line. This conditional aspect of the attributes is determined at runtime by the attributes engine. Using this option can negatively affect response time.

Note. The specific attributes that you can enter on this page are defined at system installation.

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

Attaching Files to Product Definitions

Access the Product Definition - Attachments page.

File Name	File Type	Description	Required	*Audience	Added By	Datetime Added
	Disclosure	Safety Warning	<input type="checkbox"/>	Ext		

Product Definition - Attachments page

File Name	Click to view the contents of the attachment.
Type	Select the attachment type. Options are <i>Prospectus</i> , <i>Disclosure</i> , <i>Literature</i> , and <i>White Paper</i> .
Required	Select to indicate if the user must view the attachment before ordering the product or if the information is supplemental.

Warning! For product images uploaded to a DB2 platform, the maximum image size is 32K.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Working with Notes and Attachments,” Adding Attachments to Notes

Defining Installed Product Rules

Access the Product Definition - Installed Product page.

See Chapter 10, “Tracking Installed Products and Assets,” *Defining Creation and Update Rules for Installed Products*, page 123 and *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up Customer Self-Service,” Setting Up Product Registration.

Attaching Images to Product Definitions

Access the Product Definition - Images page.

Product Definition - Images page

Image Size

Select the size of the image that you want to associate with the product. Options are *Large Image*, *Medium Image*, *Small Image*, and *Zoom Image*. You can attach one image of each size.

Browse

Click to locate, upload, and attach an image.

Note. You can upload and view only JPEG type images. The maximum size of the JPEG file depends on the database platform that you are using. Most systems can handle images up to 32 kilobytes. If you get an error message, click the Back button on your browser.

Associating Branch Scripts with Products

Access the Product Definition - Branch Scripts page.

Product Definition - Branch Scripts page

Script Type

Select a branch script type. Options are *External Application*, *Internal Application*, and *Upsell*. You can save only one script per type on this page.

Note. Up-sell scripts are used to launch a series of questions that enable a customer service representative to sell products on the phone. PeopleSoft CRM uses the internal and external scripts for financial services for the Sales Entry transaction.

Script Name

Enter the script ID number or the script name.

See Also

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

Adding Products to Product Groups

Access the Product Definition - Product Groups page.



Product Definition - Product Groups page

Product Group Type Select a product group type. The system comes with predefined product group types that fall into the following categories: pricing, reports, sales buying agreements, transportation lead times, and taxes.

Product Group Enter the number or name of a product group. A single product can belong to multiple product groups within each group type.

Primary Reporting Select to indicate a single primary reporting product group when associating multiple groups with the *Reporting* group type. Statistics are distorted if a product appears on the report under every reporting group to which the product is linked.

Primary Pricing Select to indicate a primary pricing product group if you've entered multiple groups of the *Pricing* group type.

See Also

Chapter 3, "Setting Up Product Definitional Elements," Defining Product Group Codes, page 16

Defining Product Availability for Regions

Access the Product Definition - Regions page.



Product Definition - Regions page

Region Options

All Regions Select if the product is available to customers in all regions.

Note. If you select this option, the system disregards the regions that are associated with particular products.

- Only in Regions below** Select to make the product unavailable in all regions except those that you specify.
- All except Regions below** Select to make the product available in all regions except those that you specify.
- Region ID** Enter one or more region codes if you select either the Only in Regions below option or the All except Regions below options.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Setting Up General Options,” Setting Up Regions

Tracking Competing Products

Access the Product Definition - Competitors page.

The screenshot displays the 'Product Definition - Competitors' page. At the top, there are 'Save' and 'Refresh' buttons. The product information is shown as follows:

Product 3G Prepaid Wireless Services	Product ID TEL000022
Product Type Service	SetID COM01

The breadcrumb trail is: Installed Product \ Product Groups \ Images \ Branch Scripts \ Regions \ **Competitors**. Below this is a table titled 'Competitor Product Information' with the following structure:

*Competitor Code	Description	Competitor Product ID	Description
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

There are search icons and '+' '-' buttons at the bottom of the table.

Product Definition - Competitors page

- Competitor Code** Enter a competitor code. You can create reports to perform analysis using competitor product information.

See Also

[Chapter 10, “Tracking Installed Products and Assets,” Defining Creation and Update Rules for Installed Products, page 123](#)

Enter Sub Business Projects

Access the Sub Business Projects page.

Sub Business Projects page

Enter information about the business projects that are associated with or used in conjunction with the product.

Assigning Product UOMs

To assign product UOMs, use the Product Unit of Measure (PROD_UOM) component.

This section discusses how to assign UOMs.

Page Used to Assign Product UOMs

Page Name	Object Name	Navigation	Usage
Product Unit Of Measure	PROD_UOM	Products CRM, Product Unit of Measure, Product Unit of Measure	Select the UOMs that apply to the product. Define minimum and maximum order quantities, valid order increments, and minimum selling prices for the product when sold by that UOM.

Assigning Product UOMs

Access the Product Unit Of Measure page.

Product Unit Of Measure

Product Refrigerator, Plastic Bins **Product ID** 10000
Unit of Measure Each **SetID** IPROD

Details of Unit of Measure Find First 1 of 1 Last

*UOM	Default	Minimum Quantity	Maximum Quantity	Increment Quantity	Minimum Selling Price	*Currency
EA	<input type="checkbox"/>					

Initialize UOM

Product Unit Of Measure page

Details of Unit of Measure

- UOM** (unit of measure) Enter a UOM that applies to sales order units for the product.
- Minimum Quantity** and **Maximum Quantity** Enter minimum and maximum order quantity fields. The order entry and quotation entry systems place the order line on hold if these limits are violated.
- Increment Quantity** Enter a value if a product can be sold only in specific increments.

See Also

[Chapter 10, “Tracking Installed Products and Assets,” Defining Creation and Update Rules for Installed Products, page 123](#)

Defining Product Package Components

To define product package components, use the Package Components (PRODKIT) component.

This section lists a prerequisite and discusses how to define product package components.

Prerequisite

Before you can define product package components, you must specify a package level in the product definition.

Package Products can only have a unit of measure of *Each*. If you have not created a unit of measure for *Each*, navigate to Setup CRM, Common Definitions, Unit of Measure and create an *EA* unit of measure

See Also

[Chapter 7, “Setting Up Products,” Defining Products, page 61](#)

Page Used to Define Package Components

Page Name	Object Name	Navigation	Usage
Package Components	PRODKIT_SUMMARY	Products CRM, Package Components, Package Components	Define the components of a product package, specify the maximum and minimum number of optional or required components that a customer can select, and specify (for each component) the maximum and minimum quantity that a customer can order.

Defining Product Package Components

Access the Package Components page.

Package Components

Product Kitchen Package

Product Type Package

Product ID 13001

SetID CRM01

Package Information

Minimum Components **Maximum Components**

Package Hierarchy

- Kitchen Package
 - Refrigerator, Plastic Bins
 - HP Heavy Duty Food Waste Dispo
 - 21.6 cu. Ft. Top Refrigerator

Components View All First 1 of 3 Last

Display Order

*** Component**

Description Refrigerator, Plastic Bins

*** UOM**

Unit of Measure Each

Default Quantity

Minimum

Maximum

*** Effective Date**

Obsolete Date

OK to Ship Without Order Per

Assembly
 Order

[Package Component Prices](#)

Package Components page

Minimum Components and Maximum Components

Enter the minimum and maximum number of components that a customer must purchase to complete an order.

Package Hierarchy

Displays the components of primary and nested packages using a tree diagram.

Package Components

Component	Enter the ID for each product or package that you want to add to the primary package. A package can consist of a number of individual products and secondary packages.
	Note. You cannot add a configured product to a package. Configured products within packages are not supported.
Default Quantity	Enter the default quantity for the component. This number must be between the minimum and maximum quantity for the component.
Assembly and Order	Select whether the component quantity is per package (assembly) or per order. For example, suppose that you need to deliver a manual with a computer package and the customer orders several packages. To send one manual with each ordered package, select Assembly. To send one manual with the entire order (regardless of the number of packages in the order), select Order.
Minimum and Maximum	Enter the minimum and maximum quantity that a customer can order per component. For example, if a particular component of a package is required but you can only order one, enter 1 in the Minimum field and 1 in the Maximum field. If a component is an optional part of a package, but you can order a maximum of two, enter 0 in the Minimum field and 2 in the Maximum field.
	Note. A minimum quantity of 0 means that the component is optional.
OK to Ship Without	Select to ship the available product package components without waiting for this component.

Establishing Product Prices

To establish product prices, use the Product Price (PROD_PRICE) and the Package Component Pricing (PRODKIT_COMPS_PRC) components.

This section provides an overview of product pricing and discusses how to:

- Set prices for individual products or product packages by using top-level pricing.
- View prices for package components.

Understanding Product Pricing

The sources and definitions of product prices vary depending on how you define products. Note these differences:

- Prices for products that are created in PeopleSoft SCM or a third-party SCM system are defined by inventory business units unless the product is nonstockable (for example, a service such as installation).

When you synchronize with a SCM system, you must enter the inventory business units into the Business Unit table in the PeopleSoft CRM system.

- Product definitions created in PeopleSoft CRM do not require the inventory business unit field.

In PeopleSoft CRM, the inventory business unit is unknown when a product is ordered, and the system uses the lowest price from any inventory business unit associated with the product.

See Also

Chapter 4, “Defining Items,” *Understanding Item Definition in PeopleSoft CRM*, page 23

PeopleSoft Enterprise Inventory PeopleBook

Pages Used to Establish Product Prices

Page Name	Object Name	Navigation	Usage
Product Price	PROD_PRICE	Products CRM, Product Price, Product Price	Set prices for standalone products and for product packages by using top-level pricing.
Package Component Pricing	PRODKIT_COMPS_PRC	Products CRM, Package Component Pricing, Package Component Pricing	View prices for each package component for product packages that uses component-level pricing.

Setting Prices for Individual Products or Product Packages by Using Top-Level Pricing

Access the Product Price page.

The screenshot shows the 'Product Price' page for 'Kitchen Package' (Product ID 13001, SetID CRM01). The page is divided into several sections:

- Product Information:** Product Kitchen Package, Unit of Measure EA, Product ID 13001, SetID CRM01.
- Ship From Business Unit:** Inventory Unit (text input), *Currency (text input). Includes 'Find | View All' and '1 of 1' navigation.
- Pricing Details:** *Effective Date (05/11/2004), *Status (Active), List Price (0.0000), Unit Cost (0.0000), Recurring Price (0.0000), Frequency (dropdown), MSRP (text input). Includes 'Find | View All' and '1 of 1' navigation.
- Package Pricing:** A link at the bottom left.

Product Price page

Ship From Business Unit

Inventory Unit

Enter the warehouse’s inventory business unit. This field is validated against the BUS_UNIT_TBL_FS table in PeopleSoft CRM. This field is optional for a noninventoried product.

Note. Inventory business units are established in PeopleSoft SCM or the order fulfillment system. They are synchronized with PeopleSoft CRM using a business unit EIP.

Currency Enter the currency that is used for the inventory business unit.

Pricing Details

List Price Enter the product list price. The system applies price adjustments against the list price.

Frequency Select the frequency of the recurring price.

Package Pricing Click to view package component pricing details (available only for packages that are priced at the component level).

Viewing Prices for Package Components

Access the Package Component Pricing page.

Package Component Pricing

Product Fridge Package **Product ID** 131313
Product Type Package **SetID** CRM01

Purchase in this Currency Find | View All First 1 of 1 Last
 *Currency USD

Package Effective Date Find | View All First 1 of 1 Last
 *Effective Date 10/22/2001 *Status Active
 List Price 1354.0000 Unit Cost 1100.0000
 MSRP 1500.0000 Currency USD
 Unit of Measure Each

Component Pricing Customize | Find | View All First 1-2 of 2 Last

Component	Component Price	Effective Date	Obsolete Date
10000	960.0000	10/22/2001	12/31/2099
10001	394.0000	10/22/2001	12/31/2099

[Package Components](#)

Package Component Pricing page

This page lists the components of the package, the dates on which the component became part of the package, and the date it became obsolete in the package.

Currency Select a value to represent the currency you want to use for the pricing component you are setting up.

You cannot enter information in the MSRP and Unit Cost fields until you enter a value in the Currency field.

List Price This field displays the sum of the component prices.

Unit Cost and MSRP
(manufacturer's suggested
retail price)

These fields are for informational purposes only. CRM doesn't use them to initiate any processing. These values, if available, are sent to Order Management in PeopleSoft Supply Chain Management.

See Also

[Chapter 7, "Setting Up Products," Assigning Product UOMs, page 73](#)

[Chapter 7, "Setting Up Products," Defining Product Package Components, page 74](#)

[Chapter 7, "Setting Up Products," Defining Products, page 61](#)

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Setting Up Currencies," Setting Up Currencies

Managing Product Relationships

This section provides an overview of product relationships, lists prerequisites, and discusses how to define product relationships.

Understanding Product Relationships

PeopleSoft CRM comes with a number of predefined relationship types that enable you to define relationships between products:

- Complement

A complement is an accessory to another product. For example, a headset or carrying case might be a complement to a cell phone.

- Cross-sell

A cross-sell is a product that enhances or extends the capabilities of another product. For example, a DVD player might be a cross-sell for a television.

- Up-sell

An up-sell is a product that is superior to the product that the customer inquires about or orders.

- Product alternate

A product alternate is offered in place of another. For example, suppose that the delivery time for a product does not meet the customer's needs. In that case, you might offer a product alternate.

Note. For a product to be considered an alternate product, you must link an item to it.

- Prerequisite

A prerequisite is a product that is required for another product to function properly.

- Replacement product

A replacement product is offered in place of another product that a customer orders if the original product is no longer available.

- Service feature

A service feature for a product enhances the main product or service. For example, related service features for wireless service might include caller ID and call waiting.

- Agreement

Relates products to all the service agreements that cover that product.

Prerequisites

Before you define relationships between products, you must:

1. Review the available relationships that are delivered with the system.
2. Define additional relationships that are required by the business.
3. Specify optional relationship attributes.

See Also

Chapter 3, “Setting Up Product Definitional Elements,” Setting Up Product Relationship Codes, page 20

Pages Used to Manage Product Relationships

Page Name	Object Name	Navigation	Usage
Product Relationships	PROD_RELATIONS	Products CRM, Product Relationships, Product Relationships	Define relationships between products.
Relationships Overview	PROD_REL_OVERVIEW	<ul style="list-style-type: none"> • Products CRM, Product Relationships, Relationships Overview • Click the View All link on the Product Relationships page. 	View effective relationships between products.

Defining Product Relationships

Access the Product Relations page.

Product Relationships

Save Refresh

Product Walk-In Freezer 5ft 10in x 11
SetID IPROD
Product ID SR2000

Product Relationships
Relationships Overview

***Product Relationship** Cross-Sells

Products To Relate

Status	Product ID	Description	Catalog	Start Date	End Date		
Active	10019	Freezer, Shelves	<input checked="" type="checkbox"/>	09/27/2002	12/31/2099	+	-
Active	10020	Freezer Thermostat	<input checked="" type="checkbox"/>	09/30/2002	12/31/2099	+	-
Active	10021	Freezer, Light Bulb	<input checked="" type="checkbox"/>	09/27/2002	12/31/2099	+	-
Active	10022	Freezer, Compressor	<input type="checkbox"/>	09/30/2002	12/31/2099	+	-

Advisor Dialogs To Relate

Advisor Dialog	Priority		
Freezers	1	+	-
Dishwashers	2	+	-

Product Relations page

Note. For a product to be considered an alternate product, you must link an item to it.

Product Relationship Select the relationship between the product in the Product field and the product in the Product ID field. The system may display a different set of fields based on your selection.

Product ID Enter the ID of the product that you are relating to the product in the Product field.

Start Date and End Date Enter the start and end dates of the relationship.

Advisor Dialogs To Relate

The system displays this group box if you select *Cross Sells* or *Up-Sells* as the product relationship. In these situations, you can associate advisor dialogs to the product and set the priority that the system will use to present multiple dialogs to an agent servicing a customer.

Entering Product Notes

This section lists a prerequisite and discusses how to enter product notes.

Prerequisite

Before you can associate a standard note with a product, you must define the note on the Standard Notes page.

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

Page Used to Define Product Notes

Page Name	Object Name	Navigation	Usage
Product Notes	PROD_NOTE	Products CRM, Product Notes, Product Notes	Enter standard or custom product notes.

Entering Product Notes

Access the Product Notes page.

The screenshot shows the 'Product Notes' page. At the top, it displays the product information: 'Product Annual Maintenance' and 'Product ID AGR03'. Below that, 'Product Type' and 'SetID APP01' are shown. The main section is titled 'Note Details' and contains several input fields: '*Sequence' with the value '1', '*Classification' set to 'Standard', 'Standard Note Code', 'Note Type', and a large 'Text' area. There are also 'Search Key Words' and 'Print On Documents' sections at the bottom of the form.

Product Notes page

- Sequence** Enter a sequence number to specify the order in which notes appear on documents.
- Classification** Select *Standard* or *Custom*.
- Standard Note Code** Enter the code of a standard note to associate with the product.
- Note Type** Enter the note type for a custom note associated with the product.
- Text** Enter the note text for a custom note. If you use a standard note, this field displays the predefined note text.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Working with Notes and Attachments,” Setting Up Note Types

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Working with Notes and Attachments,” Creating Standard Notes and Product Notes

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Working with Notes and Attachments,” Entering and Viewing Notes

CHAPTER 8

Defining Options for Integration to the Asset Repository Module in PeopleSoft Financials

This chapter provides an overview of options that must be set to enable integration with PeopleSoft Financials.

Understanding Integration Options for the Asset Repository Module

Enabling integration between CRM and FDM occurs on the Installed Product Configuration page which is keyed by setID. Select the box labeled Enable Asset Integration with PeopleSoft Financials to allow integration. Also, when this check box is selected, the check box that controls the display of the installed asset serial ID is automatically selected, since the PeopleSoft Financials application requires Serial ID values for all hardware assets.

The check box is the only setup option required for this integration besides the Product Mapping for Hardware Assets page and the full syncs of manufacturer and asset subtype data.

However, there are other standard PeopleSoft integration-related setups that are required. For example, you may need to configure the integration gateways, activate the relevant service operations, configure and activate routings, and set the message queues to running. These are all standard integration setup requirements.

Since the asset entries also include employee, department, and location values, the entries for these three types of data should also be in sync between the two systems. As such you also need to sync the existing messages for employee, department, and location in addition to syncing the new messages for manufacturers and asset subtypes.

See Also

[Chapter 10, "Tracking Installed Products and Assets," Mapping and Reconciling Asset Information, page 153](#)

Enterprise PeopleTools PeopleBook: Integration Broker

CHAPTER 9

Creating Catalogs

This chapter provides an overview of catalogs and discusses how to:

- Create catalog display templates.
- Define catalog content and permissions.
- Search catalogs.

Understanding Catalogs

Catalogs are a single group of products or services that are marketed and displayed together because they share common criteria. PeopleSoft Customer Relationship Management (PeopleSoft CRM) enables you to define the layout and content of online catalogs for internal and external use. You define the look and feel of catalogs by creating display templates, and then you define the contents that you want to organize and present according to the template definitions. You can designate products for inclusion in a catalog either by direct association (using product IDs) or by creating business rules to dynamically build product content based on the selection criteria that you define. Similarly, you can control user access to catalogs by associating a Security Membership List with specific catalogs.

Catalogs in PeopleSoft CRM

You can access and search catalogs from different locations within PeopleSoft CRM, and functional areas within the CRM applications are dependent on catalog definitions. Catalogs can be used and searched by external customers who are purchasing products or services, internally by customer service representatives (CSRs) who need product information, and by others within an enterprise. Catalogs can use PeopleSoft Real-Time Advisor dialogs to help direct an end user to recommended products in the catalog. Catalogs and catalog data are accessible from within and outside of PeopleSoft CRM.

Internal Access

Catalog information is available from these internal sources:

- PeopleSoft Order Capture

In PeopleSoft Order Capture, CSRs access catalog data and run catalog searches from the Entry form to obtain up-to-date information about products before they enter an order or provide quotes. In addition, access to products can be limited and validated against catalogs when a product is added to the order. CSRs can then use the product comparison tool, navigate to product details, and copy products from the search results back to the order entry form. Additionally, the CSR can use PeopleSoft Real-Time Advisor to retrieve catalog data.

Note. Users can navigate to Product Search in PeopleSoft Order Capture and enter search criteria. They can also personalize the PeopleSoft CRM portal to display a product search pagelet (if the portal pack is installed). Once in a catalog, users can access PeopleSoft Real-Time Advisor, which retrieves catalog data based on answers to questions.

See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Working with Future Dated Orders and Temporary Services”.

- PeopleSoft Sales

From the Lead and Opportunity components users can drill into the Product Search component and perform keyword searches for products. Users can then use the product comparison tool, navigate to product details, and copy products from the search results back to PeopleSoft Sales.

External Access

Catalog information is available from these external sources:

- PeopleSoft Order Capture Self Service

You can link to product detail pages from order lines, access and browse catalogs, and access PeopleSoft Real-Time Advisor, which retrieves catalog data and offers recommendations based on a user’s response to Advisor dialogs.

- Customer registry or home page

Users can browse and search the catalog. Once in a catalog, they can access PeopleSoft Real-Time Advisor, which retrieves catalog data and offers recommendations based on question-and-answer dialogs. Customers can also customize the PeopleSoft CRM portal to display a catalog search pagelet (if the portal pack is installed).

Prerequisites

Before you create catalog display templates or define a catalog’s content, you must define products using the Define Products component. In addition, because creating display templates and defining catalog content are interdependent setup steps, a catalog is not fully defined until you define both templates and content.

Note. Catalogs are limited to 1000 products per catalog.

To ensure that a user has access to catalogs, complete these setup steps:

1. Navigate to Set Up CRM, Security, CRM Application Security, Add membership list.
2. Enter *Order Capture Admin Mem List* in the Name field.
3. Enter *Order Capture Admin Membership List* in the Description field.
4. Click Next.
5. Select *Role* from the Security Object drop-down list.
6. Select Membership Applies to *Multiple Members*.
7. Click Next.
8. Select the Role Name *Order Capture Admin*.

9. Click Finish.
10. Click Save.
 1. Navigate to Set Up CRM, Security, CRM Application Security, Add security profile.
 2. Enter *Order Capture Admin Profile* in the Name field.
 3. Enter *Order Capture Admin Profile* in the Description field.
 4. Click Add functional option group.
 5. Select the Order Capture Admin check box.
 6. Click Finish.
 7. Click the Membership tab.
 8. Click Add Membership List.
 9. Select *Role* from the Security Object drop-down list.
 10. Select *Multiple Members* in the Membership Applies to field.
 11. Click Next.
 12. Select the Order Capture Admin Mem List check box.
 13. Click Finish.
 14. Click Save.

See Also

[Chapter 7, “Setting Up Products,” Managing Product Relationships, page 79](#)

Creating Catalog Display Templates

This section provides an overview of catalog display templates and discusses how to:

- Define catalog display pages.
- Define products and nested catalog display pages.
- Define product comparison pages.
- Define product detail display pages.
- Define featured product displays.
- Specify product search options.

To create catalog display templates, use the Catalog Template Definition (RO_DISPLAY_TEMPL) component.

Understanding Catalog Display Templates

You can create display templates to define a catalog’s layout and organization. Note that this task is separate from defining the products that the catalog contains. You can then apply the same reusable templates to different product collections defined in Catalog Setup. Defining layout and presentation separately from content enables you to easily modify, update, and recombine both products and presentational formats to meet different user and display requirements.

Template Setup Procedures

Define display templates using the Catalog Template Setup component. Each page in this component controls the look and feel of one or more corresponding pages or displays in the online product catalog. The catalog display page is the initial page that users access. It contains a list of catalogs and associated images. The product display page is normally the second page that users access. It can display both products and nested catalogs (as well as associated images). Access this page from a link on the catalog display page.

Many users may want to replace the Browse Catalog functionality with the Find functionality as the default. To set up the Find functionality, refer to the section on Searching Catalogs.

See [Chapter 9, “Creating Catalogs,” Searching Catalogs, page 110](#).

Pages Used to Create Catalog Display Templates

Page Name	Object Name	Navigation	Usage
Display Template	RO_DISPLAY_TEMPL	Catalog Management CRM, Catalog Template Definition, Display Template	Define the look and feel of catalogs and product display pages in online catalogs.
Product Display Page	RO_PRODUCT_DISPLAY	Catalog Management CRM, Catalog Template Definition, Product Display Page	Define the look and feel of product display pages in online catalogs.
Product Compare Page	RO_PRODUCT_COMPARE	Catalog Management CRM, Catalog Template Definition, Product Compare Page	Define the look and feel of product comparison pages in online catalogs.
Product Details	RO_PRODUCT_DETAIL	Catalog Management CRM, Catalog Template Definition, Product Details	Define the look and feel of product detail pages in online catalogs.
Featured Products	RO_PRODUCT_FEATURE	Catalog Management CRM, Catalog Template Definition, Featured Products	Define featured products displays.
Product Search	RO_PRODUCT_SEARCH	Catalog Management CRM, Catalog Template Definition, Product Search	Control the visibility options from the product search.

Defining Catalog Display Pages

Access the Display Template page.

Display Template | [Product Display Page](#) | [Product Compare Page](#) | [Product Details](#) | [Featured Products](#)

Catalog Template Catalog 2x2 International **Catalog Template ID** 57

Template Details

***Description** Catalog 2x2 International

Long Description Catalog 2x2 International

***Status** Active

Default Display Template

Show These Options

Show Nested Catalogs

Show Products

Show Long Description

Show Image

Catalog Image

Upload

Delete

Save | Return to Search | Add

[Display Template](#) | [Product Display Page](#) | [Product Compare Page](#) | [Product Details](#) | [Featured Products](#) | [Product Search](#)

Display Template page

Template Details

Description and Long Description

Enter a short and long description for the display template.

Status

Select whether the display template is *Active* or *Inactive*.

Default Display Template

Select to make this the default display template. PeopleSoft Order Capture uses the default template to determine the catalog page display when a display template is unavailable. For example, because users do not initiate product searches from within a particular catalog, how do you know which catalog product details definition to display when the user clicks a particular product after searching for it? In this case, the default catalog definition displays the product details. The same is true when a user accesses a particular product on an order. Similarly, the first page that users see when browsing catalogs is a list of catalogs. The catalog engine uses the default display template to determine whether or not to display the catalog images and long descriptions of these catalogs (catalog images appear if you select the Images check box on the Product Display Page).

Note. Only one default display template is valid in the system.

Show These Options

Show Nested Catalogs

Select to have a catalog's secondary, nested catalogs (if any) appear on the product display page and to give users access to them.

Show Products

Select to have products or services that are associated with a catalog appear on the product display page and to enable users to access product details.

Show Long Description Select to have the long description of a catalog appear. Otherwise, the system displays the short description from the Product Catalog page.

Note. Enter the long description of catalogs on the Product Catalog page.

Show Image Select to show an image if a catalog has no image. You must upload the filler image on this page. Select the image representing a catalog on the Product Catalog page.

Note. If the catalog has an image and you want it to appear on the initial catalog display page, select Images on the default template's Product Display Page.

Catalog Image

Upload Click to upload a filler image to use when a catalog image is not available or to display no catalog image.

Delete Click to delete the filler image.

Defining Products and Nested Catalog Display Pages

Access the Product Display Page.

Product Display Page

User Association Overwrite

Images	Select to display product and nested catalog images on the catalog's product display page. These images will function as links to product detail and product display pages.
	<hr/> Note. Associate images with catalogs on the Product Catalog page. Associate images with products on the Images page in the Product Definition component. <hr/>
Product Description	Select to show products' short descriptions on the product display page. These descriptions will function as links to product detail pages.
	<hr/> Note. Short descriptions come from the External Description page in the Product Definition component. <hr/>
Long Product Description	Select to show products' long descriptions on the catalog's product display page.
Featured Products	Select to identify products that are marked as <i>Featured</i> on the catalog's product display page.
	<hr/> Note. Define the look and feel of featured products on the Featured Products page of the Catalog Template Setup component. Select actual products to be featured in a catalog on the Featured Products page of the Catalog Setup component. <hr/>
Filler Image	Select to show a filler image on the catalog's product display page if a product has no image associated with it. You must upload the filler image on this page.
Price	Select to show product prices on the catalog's product display page.
	<hr/> Note. The product price is for single, one-time charges. Prices can come from price sets that are defined in the pricing engine, the List Price field on the Product Price page, or the List Price field on the Package Component Pricing page (if the product is a package that is priced at the component level). <hr/>
Recurring Price	Select to show recurring prices on the second catalog display page.
	<hr/> Note. A recurring price is a price that is charged at periodic intervals, such as a magazine subscription fee. Define recurring prices on the Price List page. <hr/>
Compare Options	Select to enable users to compare products (check boxes and a Compare button appear on the catalog's product display page).
	<hr/> Note. You cannot include nested catalogs in comparisons. <hr/>
Add to Cart	Select to enable users to add products to their carts.
Display Options	
Rows	Enter the number of rows of products or nested catalogs you want to appear on the catalog's product display page.

Columns	Enter the number of columns of products or nested catalogs you want to appear on the catalog's product display page.
Cell Width	Enter the cell width for a single nested catalog or product on the product display page. If you leave this field blank, the cells expand and shrink based on the contents, and each column expands to the largest width of any child cell.
Border Width	Enter the width of the cell borders.
Alignment	Select <i>Center</i> , <i>Right</i> , or <i>Left</i> .
Image Size	Select <i>Large</i> , <i>Medium</i> , <i>Small</i> , or <i>Zoom</i> .
	<hr/> Note. Size refers to the Product Image page and the corresponding image sizes that are loaded there for each product. For nested catalogs, it uses the image (and size) that is loaded to the catalog. <hr/>
Border Style	Select the style class of the cell borders. The background color of a cell's style class determines the cell's border color.
Filler Image	
Browse	Click to attach a filler image to use on the product display page when a product image is not available or to display no product image.
Delete	Click to delete the filler image.

Defining Product Comparison Pages

Access the Product Compare Page.

Product Compare Page

User Association Overwrite

Product Description

Select to show products' short descriptions on the catalog's product comparison page.

Note. Short descriptions come from the External Description page in the Product Definition component.

Product Long Description

Select to show products' long descriptions on the comparison page.

Note. Long descriptions come from the External Description page in the Product Definition component.

Product Unit of Measure

Select to show a product's default unit of measure (UOM) in a comparison.

Note. Set the default UOM on the Product Attributes by UOM page.

Product ID

Select to show the Product ID on the comparison page.

Price

Select to display product prices in a comparison.

Note. The product price is for single, one-time charges. Prices can come from price sets that are defined in the pricing engine, the List Price field on the Product Price page, or the List Price field on the Package Component Pricing page (if the product is a package that is priced at the component level).

Images	Select to show product images on the catalog's comparison page. <hr/> Note. Associate images with products on the Images page in the Product Definition component. <hr/>
Filler Image	Select to use a filler image if a product has no image associated with it. You must upload the filler image on this page.
Attributes	Select to display product attributes in a comparison. Only attributes whose group usage type is <i>Information</i> appear in a product comparison. <hr/> Note. Define product attributes on the Attributes page in the Define Products component. Define attribute group usage types on the Attribute Groups page. <hr/>
Attribute Classes	Select to organize the attributes that appear in a comparison into attribute classes or types. For example, materials, dimensions, and patterns are different attribute classes.
Purchase Option	Select to add a Purchase This Product link to the catalog's comparison page. Users click this link to access the product's details page, where they will find the Add to Cart button (if enabled on the Product Details page).
Product Detail	Select to have users access the Catalog's Product Detail page when they navigate to a product on the Compare page.
Arrangements	Select to have users access the Financial Services Arrangements/Terms and Conditions page when they navigate to a product on the Compare page.
Display Options	
Section Style Class	Enter the style class to use for the comparison page section headers.
Criteria Style Class	Enter the style class to use for the comparison page column that contains the elements to be compared (the leftmost column on the page).
Even Column Style Class	Enter the style class to use for the second (even-numbered) product column on the comparison page.
Odd Columns Style Class	Enter the style class to use for the odd-numbered product columns on the comparison page.
Column Width	Enter the width of the columns on the comparison page. If you leave this field blank, the columns expand and shrink based on their contents, and each column expands to the largest width of any child column.
Border Width	Enter the width of the border between all of the columns and rows in the comparison table.
Image Size	Select <i>Large</i> , <i>Medium</i> , <i>Small</i> , or <i>Zoom</i> . <hr/> Note. Size refers to the Product Image page and the corresponding image sizes that are loaded there for each product. For nested catalogs, it uses the image (and size) that is loaded to the catalog. <hr/>

Filler Image

Upload Click to upload a filler image to use on the product display page when a product image is not available or to display no product image.

Delete Click to delete the filler image.

Defining Product Detail Display Pages

Access the Product Details page.

Product Details page

User Association Overwrite

Product Description Select to display product short descriptions on the catalog's product details page.

Note. Short descriptions come from the External Description page in the Product Definition component.

Product Fields Select to display product fields on the catalog's product details page. These fields include Unit of Measure, Quantity, Price, and Recurring Price.

Attributes Select to display product attributes on the details page. Only attributes whose group usage type is *Information* appear on the Product Details page.

Note. Define product attributes on the Attributes page in the Define Products component. Define attribute group usage types on the Attribute Groups page.

Attribute Classes Select to organize the attributes that appear in a comparison of attribute classes or types. For example, materials, dimensions, and patterns are different attribute classes.

Buy Button	Select to enable the Add to Cart button and functionality to the Product Details page.
Images	Select to display product images on the catalog's Product Details page. <hr/> Note. Associate images with products on the Images page in the Product Definition component. <hr/>
Filler Image	Select to use a filler image if a product has no image associated with it. Upload the filler image on this page.
Relationships	Select to show product relationships on the Product Details page. In PeopleSoft CRM, products can be related to other products as cross-sell or up-sell opportunities, function as alternates or replacements for other products, complement other products, or be defined as prerequisites for the purchase of other products. These relationships can appear on the Product Details page to promote additional sales opportunities. <hr/> Note. Define relationships between products on the Product Relationships page. <hr/>
Relationship Images	Select to display images of related products on the catalog's product details page.
Attachments	Select to enable the Attachment functionality.
Display Options	
Image Size	Select <i>Large</i> , <i>Medium</i> , <i>Small</i> , or <i>Zoom</i> . <hr/> Note. Size refers to the Product Image page and the corresponding image sizes that are loaded there for each product. For nested catalogs, it uses the image (and size) that is loaded to the catalog. <hr/>
Filler Image	
Upload	Click to upload a filler image to use when a product image is not available or to display no product image.
Delete	Click to delete the filler image.

Defining Featured Products Displays

Access the Featured Products page.

Featured Products page

User Association Overwrite

Style Name

Enter a cell style to use for featured products.

Featured Image

Select to have the image that is uploaded on this page appear on catalog display pages when a product is marked as *Featured*.

Show Featured Products First

Select to have all of the products that are marked as *Featured* appear before other products. Use this option to show promotional products to users before they see other products.

Featured Image

Upload

Click to upload a filler image to use when a product image is not available or to display no product image.

Delete

Click to delete the filler image.

Specifying Product Search Options

Access the Product Search page.

Product Search page

Product Search

Show Price	Select to show the price of the products in Search Results on the Product Search page.
Show Add Button	Select to show the Add button in Search Results on the Product Search page.
Show Score	Select to show the Score in the Search Results area on the Product Search page.
Show Product ID	Select to show the Product ID in the Search Results area on the Product Search page.

Defining Catalog Content and Permissions

This section provides an overview of catalog content and permissions and discusses how to:

- Define catalog IDs and populate catalog caches.
- Clone catalogs.
- Define product associations.
- Set up security memberships.
- Define recommendations.
- Create nested catalogs.
- Identify featured products.

To define catalog content and permissions, use the Catalog Definition (RO_CATALOG) component.

Understanding Catalog Content and Permissions

This section discusses:

- Catalog generation.
- Direct association.

- Business rule association.
- Security memberships.

Catalog Generation

PeopleSoft CRM enables you to generate catalogs dynamically based on rules that you define online. These rules determine which products appear in catalogs, who can access catalogs, and which products are featured in catalogs. You can also link products to catalogs and define user access by direct association using product IDs and user IDs.

Direct Association

You can associate both standard and featured products with catalogs by Direct association. Direct association enables you to link specific product IDs to one or more catalog IDs. Only products associated with a catalog ID can appear in the catalog.

Business Rule Association

Business rule association enables you to define a rule that is based on field values such as product brand, product category, and product group as well as other product attributes. For example, you could define a rule that specifies that only a specific product brand can appear or be featured in a catalog. If you want, you can include more than one attribute and value pair in a single product association rule. For example, you could use these two associations to create a catalog for Company X laptops and Company Z workstations:

Condition 1: Product category = laptop and brand = Company X.

or

Condition 2: Product category = workstation and brand = Company Z.

Each condition in the rule involves an association between two values, a product category and a brand, which are joined together using the where clause operator *and*. However, the relationship between conditions is based on the where clause operator *or*; meaning that any product that satisfies either condition 1 or condition 2 appears in the catalog.

Note. The system interprets rule conditions that are defined on the same row or scroll to be joined by the *and* operator and conditions that are defined on different rows or scrolls to be joined by the *or* operator.

Security Memberships

In PeopleSoft CRM, you can control user access to catalogs by specifying security memberships.

Security Memberships enable you to specify which users or groups of users can have access to certain catalogs. For example, a company can have a membership list called *Premier Customers* that includes all of the premier customers in their system and a catalog named *Premier Catalog* that is specially prepared for premier customers. By specifying the *Premier Customers* membership list in the catalog definition, the catalog can provide special pricing and recommendations exclusively for this group of users. Similarly, you can define a membership list that includes all customers who are in the electronics industry in the California region and associate the list with a catalog on electronic products that is specific to the California region.

Note. Users cannot access catalogs that are defined with a security membership of the object type *Role*. Security membership lists for catalogs must contain Security objects of the *Customer*, *Person*, or *Partner* for users to access the catalog.

See Also

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

Pages Used to Define Catalog Contents and Permissions

Page Name	Object Name	Navigation	Usage
Product Catalog	RO_PRD_CATALOG	Catalog Management CRM, Catalog Definition, Product Catalog	Define catalog IDs and select default display templates to control the look and feel of catalogs; populate catalog cache tables.
Clone a Catalog	RO_CAT_CLONE	Click the Clone This Catalog link on the Product Catalog page.	Create copies of catalogs.
Product Association	RO_PRD_ASSOCIATION	Catalog Management CRM, Catalog Definition, Product Association	Define catalog content by direct or business rule association.
Security Membership	RO_CAT_SEC	Catalog Management CRM, Catalog Definition, Security Membership	Define user access and experience by defining Membership Lists.
Membership List	RSEC_MEMBER_SMRY	Click the View Details link on the Security Membership page.	Define memberships to enable visual access to catalogs.
Nested Catalogs	RO_NEST_CAT	Catalog Management CRM, Catalog Definition, Nested Catalogs	Link nested catalogs to a main catalog.
Featured Products	RO_FEATURED_PRD	Catalog Management CRM, Catalog Definition, Featured Products	Select products to be featured in catalogs.
Recommendations	RO_RECOMMENDATION	Catalog Management CRM, Catalog Definition, Recommendation	Select to show or not show recommendations.

Defining Catalog IDs and Populating Catalog Caches

Access the Product Catalog page.

The screenshot shows the 'Product Catalog' page with a navigation bar at the top containing tabs for 'Product Catalog', 'Product Association', 'Security Membership', 'Nested Catalogs', 'Featured Products', and 'Recomm'. Below the navigation bar is a breadcrumb trail: 'First | Previous | Next | Last | Left | Right'. On the left side, there is a 'Catalog Tree' with a folder structure: 'Catalog' (expanded) containing 'Products (8)' which includes subfolders for 'Refrigerator, Plastic Bins', 'Fridge Package', 'HP Heavy Duty Food Waste Dispo', 'HP Heavy Duty Food Waste Dispo', '24.7 cu. Ft. Refrigerator w/Fc', '26.7 cu. Ft. Refrigerator w/Fc', '21.6 cu. Ft. Top Refrigerator', and '19.6 cu. Ft. Top Refrigerator'. The main area is titled 'Catalog Details' and contains the following fields:

- *SetID: CRM01
- Catalog ID: 1
- *Catalog Name: Home Appliances
- Catalog Description: We sell all of the name brands in home appliances. Fridges, Freezers, and everything else one
- *Status: Active
- *Channel: All
- *Begin Date: 01/05/2002
- End Date: 01/15/2099
- *Display Template: 2 (Catalog 3x2 All Options)
- Advisor Dialog: (empty)
- Region Based

At the bottom of the 'Catalog Details' section are two buttons: 'Populate Catalog' and 'Clone This Catalog'. Below this is the 'Catalog Image' section, which shows a small image of a refrigerator and two buttons: 'Upload' and 'Delete'.

Product Catalog page

Catalog Tree Details

You can expand folders in the Catalog tree as follows:

- Expand the main Catalog folder in the catalog tree to display subfolders for products.
- Expand the Products folders to see individual products in the catalog.

Each folder in the tree has a link associated with it. Inside the Products folder are links for individual products:

- Clicking the Catalog link refreshes the tree display.
- Clicking the Products link accesses the Product Definition component and lets you define products (logged on users must have access to the product definition to do this).
- Clicking the link of any individual product accesses the product definition of the selected product.

Catalog Details

Catalog ID

If you are adding a new catalog, the system asks you to enter a SetID and Catalog Identification Number before you access this page.

If the catalog number already exists, the system displays this message: *The value you tried to add already exists. Select it below if you'd like to update it, or specify a new value in the fields above.*

To create a new catalog enter a number in the Catalog Identification Number field that does not already exist. Catalogs do not use the PeopleSoft CRM autonumbering feature.

Catalog Name and Catalog Description	Enter a name for the catalog, which appears in the catalog list. You can make the description appear on the catalog display page by selecting Show Long Description on the Display Template page.
Channel	<p>Select which channels to use to define access to catalogs. Values are:</p> <p><i>All</i>: Select if the catalog will be accessed externally using the web as well as internally (for example, by CSRs).</p> <p><i>Internal</i>: Select if the catalog is for internal use only.</p> <p><i>Web SS</i> (web self-service): Select if the catalog is for external access using the web (for example, by customers who are purchasing products or services through a self-service transaction).</p>
<hr/> <p>Note. The channel that is being accessed depends on the portal that is being browsed. As delivered, the customer portal is considered external, and the employee portal is considered internal.</p> <hr/>	
Begin Date and End Date	Enter dates that specify the period during which the catalog is active.
Display Template	<p>Enter a display template to control the layout of products as well as the information and options that appear in the catalog. You can override the display template on the Security Membership page, per membership.</p>
<hr/> <p>Note. You must first define the display templates using the Catalog Template Setup component.</p> <hr/>	
Advisor Dialog	<p>Associate a PeopleSoft Real-Time Advisor dialog with the catalog. When you associate a dialog with a catalog, users see a Go to Product Advisor link that launches the Advisor. Dialogs can be based on different catalog-user combinations, so that different dialogs can be targeted to different users. You can define a default dialog at the catalog level as well as an optional dialog at the user level on the Security Membership page, per membership.</p>
<hr/> <p>Note. PeopleSoft Real-Time Advisor dialogs are a series of questions and answers that constitute a recommendation experience. Advisor recommends products based on a user's responses. These responses can be weighted by the Advisor engine to emphasize certain recommendations over others based on user segments. In PeopleSoft Order Capture Self Service, users can add products or services recommended by Advisor to their shopping carts. If users exit an Advisor dialog, they are returned either to the catalog page in the self-service application or to the Order Capture entry form (in the case of the CSR).</p> <hr/>	
Region Based	<p>Select if the catalog is regional (sensitive to the geographical area of the user). When users accesses regional catalogs, they are prompted for a region, which could be the zip code of the ship-to area of service or installation, a state, a city name, or some other location, depending on how you define regions during implementation. This information can be used to dynamically hide products in the catalog that are not available in a particular area.</p>

Note. To define the regions in which specific products are available or unavailable, use the Regions Page in the Product Definition component. Product Sales regions are used for product filtering.

Note. You can also attach regional restrictions at the user level as opposed to the product level. Geographic regions are used for user associations. To enforce regional restrictions use the security membership setup. For example, a membership might include all customers in the *Southeast region*.

Populate Catalog

Click to populate cached information on which the tree in the left pane of the page is based. The tree refreshes automatically with the new information based on the catalog refresh.

Note. This button calls the RO_CAT_PUSH1 Application Engine program, which populates the cache tables storing catalog data.

Clone This Catalog

Click to access the Clone a Catalog page and clone the current catalog.

Catalog Image

Upload

Click to upload an image to represent the catalog. You determine whether this image appears in online catalogs on the Display Template page.

Delete

Click to delete the image.

Cloning Catalogs

Access the Clone a Catalog page.

Clone a Catalog page

Original Catalog Information

Catalog to be Cloned Displays the name of the catalog that is being cloned.

Cloned Catalog Information

New Catalog ID Displays the new ID that the system assigns to the cloned catalog once you click Clone Catalog.

Begin Date and End Date Enter dates that specify the period during which the new catalog is active.

Description and Long Description Enter a description, which appears in the catalog list. You can make the long description appear on the catalog display page by selecting Show Long Description on the Display Template page.

Include these for clone

Product Associations Select to save all of the product associations from the original catalog to the new catalog.

Security Memberships Select to save all of selected membership lists from the original catalog to the new catalog.

Featured Products Select to save all of the featured product rules from the original catalog to the new catalog.

Nested Catalogs Select to save all of the nested catalogs from the original catalog to the new catalog.

Defining Product Associations

Access the Product Association page.

Product Association page

Note. You should populate the catalog by clicking the Populate Catalog button on the Product Definition page after defining product associations.

From Product ID and To Product ID

Enter product IDs to link products to catalogs by direct association. To link an individual product rather than a range of products to a catalog, enter the specific product ID in the From field and leave the To field blank. Create new rows for each product or product range that you want to associate with the catalog.

Product Brand

Enter a brand to create a business rule association based on that brand. For example, you could select only Brand A product for inclusion in a catalog.

Note. Define brands on the Product Brand page.

Product Group

Enter a product group to create a business rule association based on that group. For example, you could include in the catalog all products in the product group *Dishwashers*.

Note. Add products to product groups on the Product Groups page in the Product Definition component.

Product Category

Enter a product category to create a business rule association based on that category. For example, you could include in the catalog only products that fall within the category *Trains*.

Note. Define product categories on the Product Category page.

Attribute Name and Attribute Value

Enter an attribute name on which to base a business rule association, and enter the attribute value. For example, you could use the *Material* attribute to select items for inclusion in a catalog and specify that you want to include all products in the product group *Shoes* that are made of 100 percent leather (in this case, the attribute value would be *Leather*).

Note.	Define attributes using the Attributes component. Only attributes that are associated with products are available here. Associate products with attributes on the Attributes page in the Define Products component.
--------------	---

Attribute Label	Displays the description of the chosen attribute.
Service/Product	Enables you to create a business rule association based on the definition of products as <i>Service</i> or tangible type <i>Products</i> .

Note.	Define products as service or tangible type products on the Definition page in the Product Definition component.
--------------	--

Orderable By	<p>Select a value to create a business rule association based on whether a product is universally available or available only to businesses or consumers. For example, you may want the catalog to include only products selected for businesses. Values are:</p> <p><i>All</i>: Select to include products in the catalog that are available to both customers and businesses.</p> <p><i>Consumer</i>: Select to include products in the catalog that are available to consumers.</p> <p><i>Business</i>: Select to include products in the catalog that are available to businesses.</p>
---------------------	--

Note.	Set the Orderable By status of products on the Definition page in the Product Definition component.
--------------	---

Conditional Clauses in Business Rule Associations

When you create business rule associations on the Product Association page, the conditions in the rule can be related to one another in one of two ways:

- Using *and* operators

When conditions are joined by *and* operators, all individual conditions in the rule must be met before a product can be included in a catalog. For example, if you specify that the product brand *Company X* should be included in the catalog and that within this brand, only products in the product category *Laptop Computers* should be included, you are defining a rule based on an *and* operator. In this example, the product must be both a Company X brand and a laptop to be included in the catalog.

- Using *or* operators

When conditions are joined by *or* operators, only one condition in the rule must be met before a product is included in a catalog. For example, if you specify that any product with the product brand *Company X* should be included in the catalog, as well as any computer in the product category *Workstation* (regardless of brand) should be included, you are defining a rule based on an *or* operator. In this example, if the product is either a Company X brand or a workstation, it will be included in the catalog (only one condition needs to be satisfied).

To associate conditions within a rule using the *and* operator, define all the conditions as part of the same scroll or row. For example, assume that you want to include only Company X workstations in a catalog. To do this, enter a product brand of *Company X* (condition 1) and a product category of *Workstation* (condition 2), but do not create a new row for each condition.

To associate conditions using the *or* operator, define each condition on a different scroll or row. For example, assume that you want to include all Company X products in the catalog (condition 1), as well as any workstation, regardless of brand name (condition 2). To do this, enter a product brand of *Company X*, create a new row on the Product Association page (click the Add Row button), and define the second condition by enter a product category of *Workstation*.

Setting Up Security Memberships

Access the Security Membership page.

Security Membership page

Note. If you do not define a membership list no one will have access to the catalog.

Membership	Displays membership lists that are associated with a particular catalog.
View Details	Select to view the membership details.
Priority	Enter a number to indicate the order or priority in which you want the advisor dialogs and display templates to appear. For example, if advisor dialogs and display templates were defined for three different membership lists and a user belonged to more than one membership list, then the number you enter in this field would determine which advisor dialog and display template an agent would use in conjunction with the catalog.
Advisor Dialog	Enter a PeopleSoft Real-Time Advisor dialog to override the default dialog that is selected at the catalog level (on the Product Catalog page). This dialog applies to users who meet the access requirements that you define.
Note. Advisor dialogs belong to PeopleSoft Real-Time Advisor.	
Display Template	Enter a display template to override the default template that is selected at the catalog level (on the Product Catalog page). This template applies to users who meet the access requirements that you define.
Add Membership	Select to add a new membership to the catalog security.

See Also

PeopleSoft Enterprise Real-Time Advisor CRM 9 PeopleBook

Defining Recommendations

Access the Recommendation page.

Recommendation page

Recommendation Detail

Show Recommendation Select to show recommendations at runtime when users are looking for products on the Find Products page.

Display Template Select a display template to be used for presenting recommendations.

See Also

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

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, “Working With Order Capture Self Service,” Selecting Products

Creating Nested Catalogs

Access the Nested Catalogs page.

Nested Catalogs page

Catalog ID Enter the ID of the catalog that you want to nest within the main catalog that appears at the top of the page.

Begin Date and End Date Enter the dates for which the relationship between the nested catalog and the main catalog is valid.

Identifying Featured Products

Access the Featured Products page.

The screenshot displays the 'Featured Products' page. At the top, there are navigation tabs: Product Association, Security Membership, Nested Catalogs, **Featured Products**, and Recommendation. Below the tabs is the 'Catalog Information' section, showing 'Description: Lab Unit Solutions' and 'Catalog ID: 307'. The main section is 'Featured Product Lists', which includes a search bar with 'Find | View All' and pagination 'First 1 of 3 Last'. There are several input fields: 'Product ID' (SR1018), 'Product Brand', 'Product Category', 'Attribute Name', 'Attribute Value', 'Product Group', 'Attribute Label', and 'Service/Product' (a dropdown menu). At the bottom, 'Featured Product Dates' are shown with 'Begin Date: 09/30/2002' and 'End Date: 12/31/2099'.

Featured Products page

Note. A product cannot be featured in a catalog until you associate it with the catalog on the Product Association page. Only after you establish the association can you mark the product as *Featured*.

Featured Product Lists

- | | |
|---|---|
| Product ID | Enter a product ID to define that individual product as a featured product. Create a new row for each product that you want to feature. |
| Product Brand | Enter a brand to create a business rule for featuring products based on that brand. For example, you could select all NIKE, Inc. products as featured products. |
| <hr/> | |
| Product Category | Enter a product category to create a business for featuring products based on that category. |
| <hr/> | |
| Note. Define product categories on the Product Category page. | |
| <hr/> | |
| Product Group | Enter a product group to create a business rule for featuring products based on that group. |
| <hr/> | |
| Note. Add products to product groups on the Product Groups page in the Product Definition component. | |
| <hr/> | |
| Attribute Name and Attribute Value | Enter an attribute name on which to base the business rule, and enter the attribute value. For example, <i>Material</i> is an attribute that you could use to define featured items; you could specify that you want to feature all products in the product group <i>Shoes</i> that are made of 100 percent leather (in this case, the attribute value would be <i>Leather</i>). |
| <hr/> | |
| Note. Define attributes using the Attributes component. Only attributes that are associated with products whose group usage type is <i>Information</i> are available here. | |
| <hr/> | |

	Note. Associate products with attributes on the Attributes page in the Define Products component.
Attribute Label	Displays the description of the chosen attribute.
Service/Product	Enables you to define a business rule for featuring products based on the definition of products as <i>Service</i> or tangible type <i>Products</i> .
	Note. Define products as service or tangible type products on the Definition page in the Product Definition component.

Searching Catalogs

This section provides an overview of product searches and discusses how to search products.

Understanding Product Searches

You can initiate product searches and access product data from different locations in PeopleSoft CRM:

- Customer registry users can run searches by clicking the Find Product link.
- Employee registry users can launch a catalog search by navigating to PeopleSoft Order Capture, Find Products.

Once in a catalog, users can access PeopleSoft Real-Time Advisor.

- Employee or customer users can personalize the PeopleSoft CRM portal by adding a product search pagelet to their home page (if the PeopleSoft Portal Pack is installed).
- In PeopleSoft Order Capture, CSRs can access product data and run catalog searches from the Entry form to obtain up-to-date information about products or services before they enter an order or a quote.

CSRs can copy products from the search results back to PeopleSoft Order Capture and use Real-Time Advisor to retrieve catalog data.

- In PeopleSoft Order Capture Self Service, you can link to product detail pages from order lines and access both catalogs and PeopleSoft Real-Time Advisor.
- From Lead and Opportunity components in PeopleSoft Sales, users can navigate to Find Products and perform keyword searches for products.

Users can then use the product comparison tool to access product details and copy products from the search results back to PeopleSoft Sales.

Product Search Setup

PeopleSoft CRM uses the Verity search engine to run searches against flat files called *search collections*. These files store data that is derived from the same database cache tables that are loaded when you build and populate the catalog. Before you can search a catalog, you must:

1. Populate the catalog cache tables.
2. Create the search collection.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Setting Up Search Collections”.

Search Results

When search results are returned, the user can navigate into product details and compare up to three products. When used with the internal order capture, Lead and Opportunity components, users can select products and copy them back into the Calling component.

Page Used to Search Catalogs

Page Name	Object Name	Navigation	Usage
Find Products	RX_PROD_SRCH	Orders and Quotes, Find Products, Find Products	Search products in one or more catalogs.

Searching Products

Access the Find Products page.

Find Products page

Basic Search

A basic search enables you to search catalogs based on selection criteria that you enter in the Catalog, Keywords, and Region ID fields.

Catalog

Select the name of the specific catalog that you want to search, or select *All Catalogs* to run a global search.

Keywords	Enter the keyword or keywords to use in the search. The search looks only in the catalog that you select (or in all catalogs) and looks for keywords across all fields in the search collection.
	<hr/> <p>Note. If you enter multiple keywords, the search treats these as an exact phrase. For example, if you enter <i>red bike</i>, the search would not find <i>blue bike with red trim</i>. If you want the search to treat multiple keywords independently, you must separate them with a Boolean operator such as <i>and</i> or <i>or</i>. For example, to find all occurrences of <i>red</i> and <i>bike</i>, enter <i>red and bike</i> in the Keywords field. Conversely, to find all occurrences of <i>red</i> or <i>bike</i>, enter <i>red or bike</i> in the Keywords field.</p> <hr/>
Region ID	Select a Region ID to narrow the search criteria.
Search	Click the Search button to initiate a search.
	<hr/> <p>Note. Pressing the Enter key after entering a keyword will not initiate the search.</p> <hr/>
Search Tips	Click to get tips on how to narrow or broaden the searches using the Keywords field or to get tips on advanced searches.
Advanced Search	
Advanced searches enable you to enter the same search criteria as in a basic search and more.	
Description	Enter a keyword to search only the description field for this value.
Product ID	Enter a complete ID to search only the product ID field for this value.
Brand	Select a brand to search only the product brand field for this value.
Match On	<p>Select the relationship between the elements of the advanced search. Values are:</p> <p><i>All Criteria (AND):</i> Select to relate advanced search criteria to one another using the <i>and</i> operator. All of the search criteria that you define (description, product ID, and brand) must be satisfied for the search to return a product.</p> <p><i>Any Criterion (OR):</i> Select to relate advanced search criteria to one another using the <i>or</i> operator. Only one of the search criteria that you define (description, product ID, or brand) must be satisfied for the search to return a product.</p> <hr/> <p>Note. Match On options apply only to advanced search criteria. The elements of a basic search (catalog and keyword) are always linked together by an <i>and</i> operator. Similarly, the relationship between basic and advanced search elements is always based on the <i>and</i> operator.</p> <hr/>
Search	<p>Click to initiate a search.</p> <hr/> <p>Note. Pressing Enter after entering a keyword does not initiate the search.</p> <hr/>

CHAPTER 10

Tracking Installed Products and Assets

The chapter provides overviews of installed products, installed assets, and hardware asset information mapping and reconciliation and discusses how to:

- Define creation and update rules for installed products.
- Configure installed product display options.
- Set up trees for installed products.
- Copy trees.
- Configure roles.
- Set up product registration.
- Manage installed products.
- View installed products.
- Map and reconcile asset information.

Understanding Installed Products

This section discusses:

- How installed products are used.
- How installed products are created and updated.
- System-created service orders for installed products.
- Warranty activation on installed products.
- Hierarchical views of installed products.
- Service activation of pre- and post-paid accounts.

How Installed Products Are Used

Installed products track the products (physical items or services) that are installed at a customer's site or issued to an internal worker. In PeopleSoft Support and PeopleSoft Integrated FieldService, you specify installed products in agreement lines to control the availability of these lines to the specific set of products. Installed products determine whether warranties are involved in the entitlement search when installed products are referenced on cases or service orders. Agents can reference installed products (assets) that are defined in PeopleSoft HelpDesk to determine what equipment is issued to an employee and the location of the equipment.

An agreement can also be an installed product. Agreements define the price of services or support offerings that are covered by the agreement, and the price of the agreement itself. You can define three types of agreements:

- Field service agreements specify what products in which customer sites are entitled to the service that is selected in each agreement line.
- Support agreements reference products on agreement lines.

Similar to field service agreements, support agreements may define customer sites that are entitled to support offerings. Alternatively, support agreements may contain a list of contacts who are entitled to request the support offerings listed on the agreement lines.

- Help desk agreements represent an agreed upon level of service that an organization provides to its employees.

Note. Only external or site-based agreements (non-help desk) can be represented by an installed product. Using an installed product to represent an agreement is a special case scenario that allows PeopleSoft Order Capture users to order an agreement in addition to a regular product, since both can be represented as installed products.

How Installed Products Are Created and Updated

You can manually create and maintain installed products for most products that are listed in the system using the Installed Products component. Use the Product Definition - Installed Product page to define rules that govern when installed products are automatically created and updated.

Note. If you are using PeopleSoft CRM for Communications you cannot create installed products through the Installed Products pages. You must create installed products for communications through other business processes, such as PeopleSoft Order Capture and PeopleSoft Order Management.

You can configure the system to create installed products or update the status of installed products when:

- Orders are placed using PeopleSoft Order Capture or PeopleSoft Order Capture Self Service.
- The CRM system receives automatic shipping notification (ASN) messages from another system, such as PeopleSoft Order Management.
- Material usage and removal transactions are recorded using the Service Order component in PeopleSoft Integrated FieldService.

Note. The system automatically creates installed products with the status of *Installed* for products that are newly registered using the Product Registration component. For registered products that already have installed products, the system does not update the installed product status. Based on how the administrator configures the Product Registration page (for example, what fields are available and whether they are editable), users can update installed products as they complete the registration.

At the installation level, you can define two sets of installed product creation and update rules that the system uses as default values for the Product Definition - Installed Product page: one set for those products that require a service order for installation and another set for those that do not. At the product definition level, however, you can have only one set of rules

When you set up these rules for installed products using the Product Definition component, you can click the Apply Defaults button on the Installed Product page to populate the appropriate default rules. While you can modify the default rules for specific products, you can also update the configurable default values (used across all products) on the Installed Product Defaults page under Set Up CRM, Install, Product Options.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up Customer Self-Service,” Setting Up Product Registration.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Customer Self-Service Transactions,” Registering Products.

See [Chapter 10, “Tracking Installed Products and Assets,” Defining Creation and Update Rules for Installed Products, page 123.](#)

Rules for Installed Product Status

You can configure the system to set the status of installed products that it creates or updates to one of three values: *Pending*, *Installed*, or *Shipped*. Typically, implementations suggest these rules, but you can configure them for your own business processes.

For a product that requires a service order for installation:

- When the installed product is created after submitting an order, set the status to *Pending*.
If a subsequent ASN message is received, update the status to *Shipped*.
- When the installed product is created as a result of the receipt of an ASN message, set the status to *Shipped*.
- When a material usage transaction (recorded on the Order Materials component) results in a creation or update of the installed product, set the status to *Installed*.

For a product that does not require a service order for installation:

- When the installed product is created on order capture, set the status to *Pending*.
If a subsequent ASN message is received, update the status to *Installed*.
- When the installed product is created as a result of the receipt of an ASN message, set the status to *Installed*.

Note. If a product does not require a service order for installation and a rule has been established for ASN receipt that sets the status to a value other than *Installed*, you must manually set the status of the installed product to *Installed* when appropriate.

You may want to set up rules that require manual intervention for business processes that require an action or response from a customer. For example, suppose that you ship a product that requires some type of installation, such as setting up a personal computer that the customer performs. When the customer completes the installation process, he or she can contact you to update the record.

See Also

[Chapter 7, “Setting Up Products,” Managing Product Relationships, page 79](#)

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, “Managing Orders and Quotes”

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Ordering and Receiving Materials”

PeopleSoft Enterprise Order Management PeopleBook

System-Created Service Orders for Installed Products

When defining products using the Product Definition component, you can indicate whether an installed product requires a service order to complete installation. When a user places an order for the installed product in PeopleSoft Order Capture or Order Capture Self Service, component interfaces enable the system to stage a service order for the specified installation service in PeopleSoft Integrated FieldService.

When the status of the installed product or group of records that is associated with the ordered product is updated to *Shipped* (that is, when the ASN shows that the corresponding order line has been completely fulfilled), the system automatically generates a service order using the information that is defined for the specified installation service.

The initial status of the system-created service order is *Open*, with all associated service order activities set to *Open - Hold Assignment*.

If you enable automatic technician assignment and the system has successfully assigned a provider group and group member to the service order, the status of service order activities that are assigned with technicians is set to *Open - Assigned*.

When an order for multiple installed products that require installation is saved in PeopleSoft Order Capture or Order Capture Self Service, the system creates one service order for each product-site combination on the order.

See Also

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, “Working with Order Capture Business Projects”

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Creating and Managing Service Orders”

Warranty Activation on Installed Products

You can define or update warranties using the Warranties component under Customer Contracts CRM, Agreements. Associate an item with a warranty on the Item Definition page under the Items CRM, Inventory Item Definition.

When a user creates a case or service order for a customer’s installed product, the system first checks for entitlements that are associated with a valid warranty on the customer’s installed product before searching for entitlements on an agreement.

When you create an installed product using an item that is associated with a warranty, the system activates the associated warranty and calculates the warranty duration using information from both the warranty and installed product.

Note. The system can calculate the warranty duration for an installed product only if the appropriate process updated the base date that is used to calculate the warranty’s start date.

For example, suppose that the warranty is defined to start upon shipment but no ASN (shipment) status update rules are defined for the product. In this case, the installed product is created at order time, with an order date but no shipment date. The warranty is associated with the installed product at order time, but no warranty dates are populated.

In this scenario, a user must manually update the installed product’s warranty start and end dates for the warranty information to appear in entitlement matches. However, if the product has ASN status update rules defined, the system automatically records the ship date and the warranty start and end dates on the installed product as soon as the ASN is processed for the product.

If necessary, you can manually update the warranty status and coverage period on the installed product using the Installed Products component.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Setting Up and Managing Agreements and Warranties”

Hierarchical Views of Installed Products

In PeopleSoft CRM, you can establish parent-child relationships between installed products and display them graphically from several points in the system. This functionality can be implemented to support a wide range of business needs, including the ability to view the associated parent assembly or subcomponents for a given installed product, view the geographic locations of specific network components, or view the components of a customer's service package.

Hierarchical Relationship Creation

You can manually define relationships between installed products using the Installed Products component. For a given installed product, you specify the installed product of the parent product to establish a parent-child relationship. When two installed products reference the same parent record the system creates sibling relationships.

The system automatically defines the relationships for installed products that are created when product packages are ordered in PeopleSoft Order Capture or Order Capture Self Service. The system automatically defines relationships for orders of static kits that originate in PeopleSoft Order Management.

For both package and static kit orders, the system creates installed products for each of the products in the package or static kit that are defined as installed products. If a product in a package or static kit is not defined as an installed product, the installed product hierarchy does not display that product.

For example, suppose that a parent product is defined as an installed product, the child product is not, and the grandchild product is. When the package is ordered, the system creates records for only the parent and grandchild rows and establishes a parent-child relationship between them.

How Hierarchical Relationships Are Viewed

Once you define the appropriate relationships, users can view them graphically in a tree format by accessing the Installed Product Viewable Hierarchy page. In PeopleSoft CRM, you can access this page from pages and page toolbars in these components:

- Installed Product
- Service Order
- My Service Order
- Support Case
- HelpDesk Case
- RMA (return material authorization) Form
- Site (under Customers CRM)
- Product Registration Installed Assets
- Search Installed Products and Services
- Search Installed Assets
- Customer 360 Degree View
- Worker 360 Degree View
- Order Capture Entry
- Self-Service Accounts
- Self-Service View Services
- Self-Service Support Case

- Self-Service HelpDesk Case

Note. For cases that you access from the corresponding Case components, the View Hierarchy button (which you click to access the Installed Product Viewable Hierarchy page) is not available if the business units to which they belong are associated with call center configuration templates that are set to hide installed product information.

The system filters the installed products that appear in the viewable hierarchy using the name of the customer or internal worker, site, account, product, and department values that are available on the page from which you accessed the viewable hierarchy.

For example, if you access the viewable hierarchy from a page where customer and site fields have values, the system returns all of the installed products for the specified customer and site. If you access the viewable hierarchy from a page where the customer and product fields have values, the system displays all of the installed products for the specified customer and product.

This table summarizes the installed products that are returned for specific field values:

Field Value on Source Page	Installed Products Returned
Site	All installed products for the specified customer or internal worker and site plus any related parent, sibling, or child installed products. Note. Not valid for PeopleSoft HelpDesk.
Product	All installed products for the specified customer or internal worker and product ID plus any related parent, sibling, or child installed products.
Department	All installed products that match the specified customer or internal worker and department plus any related parent, sibling, or child installed products.
Account	All installed products that match the specified customer and account plus any related parent, sibling, or child installed products.

On the Installed Product Viewable Hierarchy page, the system lists the filter criteria values that are used to select which installed products to display. Initially, the system displays all records for all statuses. By default, the system also displays the immediate family relationships—parent, sibling, or child—for each installed product that is returned. You can modify the initial display to view records that match a specific status. You can also elect to filter the family relationships and view only those records that meet the filter criteria on the source page.

Additional runtime filters, other than Status as mentioned previously, exist. Installed Product ID and Product are always shown, whereas the other filters are configurable using the Tree Set Up component.

These filters include:

- Installed Product ID
- Product
- Site
- Account

- Department
- Status

See Also

[Chapter 7, “Setting Up Products,” Managing Product Relationships, page 79](#)

Service Activation of Pre- and Post-Paid Accounts

PeopleSoft Enterprise Bill Presentment and Account Management enables users to manage both pre- and post-paid accounts. You can also retrieve current billing and account status information on prepaid accounts from a third-party billing vendor.

Prepaid services are paid for before usage. For example, customers may pay in advance for wireless services that will be consumed later. Post-paid customers pay after the wireless service is consumed. Post-paid customers usually have a monthly billing cycle and require credit verification.

To activate these services, use the Service Management Order component in PeopleSoft Order Capture. The system uses the Activate table (RO_ACTIVATE) to hold activation details associated with an activated Service Management Order. It also uses the Capture component interface to load the Service Management Order with the installed product that is being activated. The system transfers control to the Service Management page and loads the new Service Management Order. You can navigate to the component by selecting the Activate Services link from the 360- Degree View page when the system displays a communications customer.

See Also

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

Understanding Installed Assets

This section discusses:

- How the CRM installed asset table is updated.
- How new assets in PeopleSoft Financials Management System, FMS, are identified in CRM.

How the CRM Installed Asset Table is Updated

Installed assets may be manually entered directly into the system using the Installed Assets page. For customers using PeopleSoft FMS, installed asset entries may be initially created by a full synchronization to the FMS asset repository data. All FMS entries of Asset_Type 010 (IT-Hardware) are added to the data on the CRM-installed asset table. Subsequent additions and updates to the FMS asset repository data for Asset_Type 010 entries are sent to CRM for incremental synchronization.

Before running the full Asset synchronization, you need to run these full synchronizations from FMS to CRM:

- Asset Subtype
- Manufacturer
- Location
- Department

- Employee

Performing these synchronizations ensures that the values used in the asset entries for the tables listed previously will exist in the system. This action helps prevent *Invalid Entry* problems when viewing the installed asset data.

This preparation also ensures that the relevant data referred to on FMS assets (customer, department, manufacturer, and so on) has corresponding entries on the CRM side. Without the corresponding data on the CRM side, the full synchronization may attempt to create a CRM-installed asset for an employee who does not exist in CRM. If you attempt to create an installed asset this way, the system displays an error message.

How New Assets in PeopleSoft Financials are Identified in CRM

When asset data is sent from FMS to CRM, the CRM-installed asset table is updated like this:

Positive Matches

- If a match exists on the business unit and asset ID between the FMS data and the CRM data, the CRM data for that row is updated with all the values from FMS.

This action may occur when data for an asset has previously been received from FMS by CRM and a change is subsequently saved and published by FMS.

- If a match exists on the installed product ID between the FMS data and the CRM data, the CRM data for that row is updated with all the values from FMS.

This action may occur when data for an asset was created by CRM and sent to FMS, and a change is subsequently saved and published by FMS. In this case, the corresponding CRM entry would have the same installed product ID (INST_PROD_ID) but would still have no values for the business unit and asset ID.

- If a match exists on the serial ID but not the business unit or asset ID, the CRM data for that row is updated with all the values from FMS.

This action may occur if data for the same asset has been entered independently in both FMS and CRM.

Note. If data for the same asset has been entered in FMS and CRM in a previous release, the FMS entry will not initially have the key fields for the corresponding CRM entry, and the CRM entry will not initially have the key fields for the corresponding FMS entry. However, if both entries refer to the same serial ID, it can be assumed that they refer to the same actual asset.

Assumed Positive Matches

- Asset Tag

If a match exists between FMS and CRM based on identical non-null values for asset tag and product and if a blank value exists for business unit, asset ID, and serial ID on the CRM side, then the CRM data for that row will be updated with all the values from FMS. This action applies in situations where data for the same actual assets already exists in FMS and CRM but the only value on the CRM side is an asset tag rather than a serial ID. In this case, an update from FMS needs to be matched against the corresponding CRM entry.

- Employee and Product

If a single matching row exists between FMS and CRM based on identical non-null values for employee ID and product ID and if a blank value exists for business unit, asset ID, and serial ID on the CRM side, then the CRM data for that row is updated with all the values from FMS. This action applies in situations where data for the same actual assets already exists in FMS and CRM and the only value on the CRM side is an asset tag rather than a serial ID. In this case an update from FMS needs to be matched against the corresponding CRM entry

If a single entry in CRM matches the assigned employee and product, the system assumes it refers to the same actual asset and the CRM entry is updated.

- Department and Product

If a single matching row exists between FMS and CRM based on identical non-null values for department ID and product ID and if a blank value exists for serial ID on the CRM side, the CRM data for that row is updated with all the values from FMS. This action applies in situations where data for the same actual assets already exists in FMS and CRM and the only value on the CRM side is an asset tag rather than a serial ID. In this case, an update from FMS needs to be matched to the corresponding CRM entry.

If a single entry in CRM matches the assigned department and product, the system assumes it refers to the same actual asset and the CRM entry is updated.

Ambiguous Matches

In all other cases for which the system cannot unequivocally determine that the asset is definitely the same or definitely different on both systems, the data for that row is sent to a reconciliation table that a user may access online.

This case should apply in situations for which data for the same actual assets may exist in FMS and CRM, when the only value on the CRM side is an asset tag rather than a serial ID; but for which the lack of matching unique identifiers or the presence of multiple potential matches prevents a positive match.

In this case, the user needs to determine if an update or an add is required on the CRM side to reconcile the data from FMS

The online page lists all the rows of data that require reconciliation with CRM entries. You can open each entry to see the possible matches with existing CRM installed assets based on the matches on the product ID and one or more of these fields: Employee ID, Department ID, and Location. Drilling in on the first entry on the screen presents the user with all possible matches.

This detail page shows all possible matching CRM entries and provide an action button to process any of these rows. The Merge Selected Installed Asset link allows you to:

- Confirm that the row for that CRM entry refers to the same actual asset as the data from FMS.
- Update the CRM data with all the values from the FMS system.

After identifying the desired row and clicking the Merge Selected Installed Asset link, the data from the FMS asset is used to update the selected CRM asset. The system then returns to the first screen, which shows all unreconciled FMS asset records.

The Create New Installed Asset button allows the user to specify that the FMS data does not refer to any asset on the CRM side. It also creates a new CRM installed asset row based on the values from the FMS row.

Understanding Hardware Asset Information Mapping and Reconciliation

This section discusses:

- Product mapping for hardware assets.
- Reconciling asset information and defaults.

Product Mapping for Hardware Assets

The CRM Installed Product table requires a product ID for every installed asset. This enables users to see the kind of asset that is being referred to in the system. Since neither the product ID nor inventory item ID are required for entries in the FMS asset table, it is important that the CRM-installed product table entries are assigned a product ID based on the following options:

- If the FMS asset table entry has an entry for the product ID, the system uses it to check the corresponding inventory item ID.

If more than one inventory item ID is found, the system uses the first inventory item ID when creating the CRM installed product entry.

- If the FMS asset table entry has no entry for the inventory item ID, the product ID is assigned to the CRM installed product entry based on a mapping table that is defined at setup (installation) by the user to map certain fields from the FMS system to the equivalent product ID's that you set up on the CRM system.

To go to this page click Set Up CRM Common Objects, Integration Rules, Integration Defaults, Asset Product Mapping. The search page enables the user to open the page for the desired setID value of the Product table to which the user is mapping entries.

The intention for this system design is to create a distinct product that will be mapped to each combination of asset subtype, manufacturer, and model that is expected to be present in the list of assets that is returned from FMS, including the discovery process that is run on FMS. The system allows a product to be associated with each type of asset. When receiving information about a new asset from FMS, CRM checks the mapping table to see if a match exists on non-null values for the asset subtype, manufacturer, and model fields.

If a match exists, the system uses the corresponding product from the mapping table to create the new installed asset in CRM. If no match is found on the three fields, a match is attempted on the asset subtype and manufacturer. If a match is found, the corresponding product ID is used. If no match is found on these two fields, a match is attempted only on asset subtype. If no match is found on this field, a match is attempted just on blank values for asset subtype, manufacturer, and model. This type of row corresponds to a default product ID.

Note. A *SaveEdit* error on the mapping page requires a value for manufacturer if a value for model is present on that row. In addition, this SaveEdit error requires that the user enter a single default value specifying a product that should be used when no other match applies. This entry ensures that we can always map a product to any entry that comes from FMS.

As mentioned previously, you could set up your system so that the assets sent from FMS (asset type of IT-Hardware) have values for asset subtype, manufacturer, and model, and ensure that each of these combinations is mapped to a distinct product on the mapping page. This setup would involve setting up the appropriate asset subtypes and profiles on the FMS side and the appropriate products and product mapping setup page on the CRM side. Providing a default product ID as described previously ensures that a product ID can always be found for use in the CRM installed product table. This default is required since the CRM installed product table requires a product ID value for each of its entries.

Note. Before adding data to the Product Mapping page, you must run the *Manufacturer_Fullsync* and *Copy_AM_Subtype* full synchronizations.

Reconciling Asset Information and Defaults

If the system cannot determine if the asset is the same on both the CRM and FMS databases, use the Asset Reconciliation page to reconcile or add asset information.

The system checks the mapping table first to determine the product ID since a default product ID should always exist for use in the mapping table even when no matches occur on the asset subtype, manufacturer, and model data. If no mapping table entry is found, the system derives the product ID from the item ID, which means that the item ID would be used only in cases when no mapping table exists for the setID. Not having a mapping table for the setID, however, would constitute an erroneous data setup.

Defining Creation and Update Rules for Installed Products

This section discusses how to:

- Set up default installed product rules.
- Define installed product rules for a product.

Note. To define creation and updates rules for installed products, use the Product Installation (PROD_INSTALLATION) component.

Pages Used to Define Creation and Update Rules for Installed Products

Page Name	Object Name	Navigation	Usage
Installed Product Defaults	RF_INSTPRD_DFLT	Set Up CRM, Install, Product Options, Installed Product Defaults	Specify default rule sets that determine how system transactions create and update installed products. On the Product Definition - Installed Product page, you can click a button to populate the appropriate default rule set and modify the rules for specific products, as necessary.
Product Definition - Installed Product	PROD_INSTALL	Products CRM, Product Definition, Installed Product	Specify rule sets that determine how system transactions create and update installed products for specified products.

Setting Up Default Installed Product Rules

Access the Installed Product Defaults page.

Product Installation	Installed Product Defaults
Default Values	
Products Which Require a Service Order for Installation	
Order Capture	
<input checked="" type="checkbox"/> Create Installed Product	
Initial Status <input type="text" value="Pending"/>	
Shipping Notification (ASN)	
<input checked="" type="checkbox"/> Create Installed Product	<input checked="" type="checkbox"/> Update Installed Product
Initial Status <input type="text" value="Shipped"/>	New Status <input type="text" value="Shipped"/>
Manage Material	
<input checked="" type="checkbox"/> Create Installed Product	<input checked="" type="checkbox"/> Update Installed Product
Initial Status <input type="text" value="Installed"/>	New Status <input type="text" value="Installed"/>

Installed Product Defaults page (1 of 2)

Products Which Do Not Require a Service Order for Installation	
Order Capture	
<input checked="" type="checkbox"/> Create Installed Product	
Initial Status <input type="text" value="Pending"/>	
Shipping Notification (ASN)	
<input checked="" type="checkbox"/> Create Installed Product	<input checked="" type="checkbox"/> Update Installed Product
Initial Status <input type="text" value="Installed"/>	New Status <input type="text" value="Installed"/>
Manage Material	
<input checked="" type="checkbox"/> Create Installed Product	<input checked="" type="checkbox"/> Update Installed Product
Initial Status <input type="text" value="Installed"/>	New Status <input type="text" value="Installed"/>

Installed Product Defaults page (2 of 2)

Products Which Require a Service Order for Installation

Order Capture

If you want the system to create installed products when an order for the product is saved in PeopleSoft Order Capture or Order Capture Self Service, select the *Create Installed Product* check box and then select an initial status of *Pending*, *Installed*, or *Shipped* for the installed product.

Shipping Notification (ASN)

If you want the system to create installed products when an ASN message for the order is received, select the *Create Installed Product* check box and then select the initial status of the installed product.

If the system should update existing installed products when an ASN message for the order is received, select the *Update Installed Product* check box and select the new status of the installed product.

You can select both check boxes with appropriate statuses to enable the rule sets for creating and updating installed products.

Note. For products that require a service order for installation, you cannot define rules that enable the installed product status to be set to *Installed* when an order is captured or an ASN is received.

Manage Material

If you want the system to create installed products when material usage and removal is recorded using the Order Materials component in PeopleSoft Integrated FieldService, select the *Create Installed Product* check box and then select the initial status of the installed product.

If the system should update existing installed products when material usage and removal is recorded using the Order Materials component, select the *Update Installed Product* check box and then select the new status of the installed product.

You can select both check boxes with appropriate statuses to enable the rule sets for creating and updating installed products.

Products Which Do Not Require a Service Order for Installation

Order Capture

If the product does not require a service order for installation, and the installed product is created when an order for the product is saved in PeopleSoft Order Capture or Order Capture Self Service, select the *Create Installed Product* check box and then select an initial status. PeopleSoft suggests that you set the initial status to *Pending*.

Shipping Notification (ASN)

If the system receives a subsequent ASN message for a product that does not require a service order for installation, select the *Create Installed Product* check box and then select the initial status of *Installed*.

If the system should update existing installed products when an ASN message for the order is received for a product that does not require a service order for installation, select the *Update Installed Product* check box and then select a new status. PeopleSoft suggests that you set the new status to *Installed*.

You can select both check boxes with appropriate statuses to enable the rule sets for creating and updating installed products.

Note. If a product does not require a service order for installation and a rule has been established for ASN receipt that sets the status to a value other than *Installed*, you must manually set the status of the installed product to *Installed* when appropriate.

You may want to set up rules that require manual intervention for business processes that require an action or response from a customer.

For example, suppose that you ship a product that requires some type of installation, such as setting up a personal computer, that the customer performs. When the customer completes the installation process, he or she can contact you to update the record.

Manage Material

If the product does not require a service order when material usage and removal is recorded using the Order Materials component in PeopleSoft Integrated FieldService, select the *Create Installed Product* check box and then select the initial status of *Installed*.

If the system should update existing installed products when material usage and removal is recorded using the Order Materials component in PeopleSoft Integrated FieldService for a product that does not require a service order for installation, select the *Update Installed Product* check box and then select a new status. You should set the new status to *Installed*.

Defining Installed Product Rules for a Product

Access the Product Definition - Installed Product page.

Product Definition - Installed Product page (1 of 2)

Name	Field	Modifiable		
Comments	COMMENTS254	<input checked="" type="checkbox"/>	+	-
Purchase Date	INSTALLED_DATE	<input checked="" type="checkbox"/>	+	-
Date Registered	REGISTERED_DATE	<input type="checkbox"/>	+	-
Serial ID	SERIAL_ID	<input checked="" type="checkbox"/>	+	-

Product Definition - Installed Product page (2 of 2)

Track as Installed Product Select to enable installed products to be created automatically for the product.

Product Installation Settings

Service Order Required	Select if a service order must be created for product installation.
Install Service ID	Select the ID of the service that would be used to install the product. Define services using the Services component under Set Up CRM, Product Related, FieldService.
	<hr/> <p>Note. If a site is required for the service you selected, the system automatically selects the Site Required check box. Also, if the same service is used to remove the product, the system automatically fills in the Uninstall Service ID field with the name of the service.</p> <hr/>
Site Required	Select to require a customer site on orders that are created for the product in PeopleSoft Order Capture or Order Capture Self Service. If selected, users must select a site address for the install address on the Entry Form - Shipping page before they can save the order.
Uninstall Service ID	Select the ID of the service that would be used to remove the product. Define services using the Services component under Set Up CRM, Product Related, FieldService.
Un-Install Service Order	Select if a service order is required to remove the product.
Apply Defaults	<p>Click to populate the appropriate default rules that determine how system transactions create and update installed products. The system returns one of two default rule sets depending on whether the Service Order Required check box is selected. You can modify these rules as necessary for the specific product.</p> <p>Default creation and update rules for installed products are defined on the Installed Product Defaults page under Set Up CRM, Install, Product Options.</p>

Note. The fields in the Order Capture, Shipping Notification (ASN), and Manage Material group boxes are the same as those on the Installed Product Defaults page.

See [Chapter 10, “Tracking Installed Products and Assets,” Defining Creation and Update Rules for Installed Products, page 123.](#)

Registration Fields

Use the Registration Fields group box to define which of the installed product fields appear for users on the Product Registration - Product Registration Details page, where they register products.

The system populates this area with the default values that you define on the Product Registration Setup page. You can modify this registration field list as needed. The selection that you make on the Product Definition - Installed Product page is specific to the associated product only.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up Customer Self-Service,” Configuring Installed Product Registration.

See Also

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, “Managing Orders and Quotes,” Entering Shipping, Payment, and Billing Information

Configuring Installed Product Display Options

To configure installed products, use the Installed Product Configuration (RF_IPRD_CONFIG) component.

This section discusses how to:

- Defining installed product status options.
- Set up display options for installed products.
- Define status translate values for installed products.

Pages Used to Configure Installed Product Display Options

Page Name	Object Name	Navigation	Usage
Installed Product Status Options	RF_IPRD_CFG_STAT	Set Up CRM, Product Related, Installed Product, Installed Product Statuses, Installed Product Status Options	Enter installed product status options.
Set Up Options	RF_IPRD_CONFIG	Set Up CRM, Product Related, Installed Product, Configuration, Set Up Options	Set up display options for installed products.
Define Status Translates	RF_IPRD_CONFIG_ST	Set Up CRM, Product Related, Installed Product, Configuration, Define Status Translates	Define status translate values for installed products.

Defining Installed Product Status Options

Access the Installed Product Status Options page.

Installed Product Status Options

Installed Product Statuses [Customize](#) | [Find](#) | [View All](#) |  First Last

*Field Value	Translate Long Name	Translate Short Name	
CAN	Cancelled	Cancelled	
DEF	Defective	Defective	
DIS	Disconnected	Disconnect	
INS	Installed	Installed	
INSV	In Service	In Service	
INT	In-Transit Return	In-Transit	
INV	In Inventory	Inventory	
IR	In Repair	In Repair	
OFL	Off Line	Off Line	
OTSV	Out of Service	Out Servic	

Installed Product Status Options page

Enter the code, long description, and short description for the statuses that you want to use for the installed products that you use in your business environment. Users and implementers can select these values from many pages within CRM, including the Define Status Translates page that is documented in this section.

Setting Up Display Options for Installed Products

Access the Set Up Options page.

Set Up Options
Define Status Translates

SetID CRM01

Set Up Options

Products

Check All / Clear All

Allow Installed Product Creation for Site Without a Customer
 Show Asset Tag
 Show Preventive Maintenance
 Show Serial Number
 Show Account Information

Show Operating System Section
 Show Price Information
 Show Warranty Information

Services

Check All / Clear All

Allow Installed Service Creation for Site Without a Customer
 Show Change Order Pushbutton
 Show Account Information

Show Price Information

Assets

Check All / Clear All

Show Serial Number

Show Price Information

Integration Options

Enable Asset Integration with PeopleSoft Financials

▶ Audit History

Set Up Options page

Use this page to select the fields that you want the system to displayed on the Installed Product page when you are adding a new product, service, or asset. This page is keyed by setID.

Note. If you do not have PeopleSoft HelpDesk installed, the system does not display the Assets group box.

Defining Status Translate Values for Installed Products

Access the Define Status Translates page.

Set Up Options		Define Status Translates						
SetID CRM01								
Product Status Translates			Customize	Find	View All	First	1-11 of 11	Last
Field Value	Translate Long Name	Translate Short Name						
DEF	Defective	Defective	+	-				
INS	Installed	Installed	+	-				
INT	In-Transit Return	In-Transit	+	-				
INV	In Inventory	Inventory	+	-				
IR	In Repair	In Repair	+	-				
PND	Pending	Pending	+	-				
SHP	Shipped	Shipped	+	-				
SPA	Spare	Spare	+	-				
UNI	Uninstalled	Uninstall	+	-				
WD	Waiting Disposition	Wait Disp	+	-				
WR	Waiting Repair	Repair	+	-				

Define Status Translates page (1 of 3)

Service Status Translates		Define Status Translates						
SetID CRM01								
Service Status Translates			Customize	Find	View All	First	1-10 of 10	Last
Field Value	Translate Long Name	Translate Short Name						
CAN	Cancelled	Cancelled	+	-				
DIS	Disconnected	Disconnect	+	-				
INS	Activated	Activated	+	-				
PDI	Pending-Disconnection	Pending	+	-				
PND	Pending-Activation	Pending	+	-				
PRE	Pending-Resumption	Pending	+	-				
PSU	Pending-Suspension	Pending	+	-				
RES	Resumed	Resumed	+	-				
SUS	Suspended	Suspended	+	-				
UNI	Deactivated	Deactivate	+	-				

Define Status Translates page (2 of 3)

Asset Status Translates				
Field Value	Translate Long Name	Translate Short Name		
INS	Installed	Installed	+	-
PND	Pending	Pending	+	-
SHP	Shipped	Shipped	+	-
UNI	Uninstalled	Uninstall	+	-

Agreement Status Translates				
Field Value	Translate Long Name	Translate Short Name		
CAN	Canceled	Canceled	+	-
INS	Active	Active	+	-
PND	Pending	Pending	+	-
SUS	Suspended	Suspended	+	-
UNI	Inactive	Inactive	+	-

Define Status Translates page (3 of 3)

Note. Status code values are defined on the Installed Product Status Options page. Click Set Up CRM, Product Related, Installed Product, Installed Product Statuses.

Use this page to define translate values for installed products, services, assets and agreements. Enter the field value for each type of product that you are using and then enter a long and short translate name.

Based upon the type of product you are installing, the system displays the values that you enter in the Translate Long Name field in the drop-down list box for the Status field on the Installed Product page.

Note. If you do not have PeopleSoft HelpDesk installed, the system does not display the Asset Status Translates group box.

Warning! If you are defining a new set of status translates, the following values should always be used in addition to any optional statuses that you want to add: *INS* (Installed/Activated), *UNI* (Uninstalled/Deactivated), *SHP* (Shipped), and *PND* (Pending). These statuses are hard coded throughout the system for certain scenarios.

Setting Up Trees for Installed Products

To set up trees for installed products, use the Installed Product Tree Setup (RF_IPRD_TREE_DEFN) component.

This section discusses how to:

- Set up trees for installed products.
- Set up nodes for installed products.
- Test trees for installed products.

Pages Used to Set Up Trees for Installed Products

Page Name	Object Name	Navigation	Usage
General Options	RF_IPRD_TREE_DEFN	Set Up CRM, Product Related, Installed Product, Set Up Tree, General Options	Define the tree configuration (images to display in the tree, image size, page size, and date filter).
Define Nodes	RF_IPRD_TREE_NODE	Set Up CRM, Product Related, Installed Product, Set Up Tree, Define Nodes	Define the parent and child relationship of the tree nodes.
Test Tree	RF_IPRD_TREE_TEST	Set Up CRM, Product Related, Installed Product, Set Up Tree, Test Tree	Test the 360-Degree View tree to ensure that you configured it correctly.

Setting Up Trees for Installed Products

Access the General Options page.

General Options page

- Tree Name** Displays the name for the tree for the installed product that you entered on the Add page.
- Description** Enter a description of the tree you are adding.
- Market** Select the market that will use the tree.
- Default** Select to set this tree as the default tree that appears for this market on the Installed Product Hierarchy page if multiple trees exist.

General Tree Options

Use the fields in this group box to configure how the tree will look on the Installed Product Hierarchy page.

Expanded Image, Collapsed Image, End Node Image, and Leaf Image Name

Enter the images that you want the system to display on the tree. A representation of the image appears to the right of the field. The defaults are:

- Expanded Image: *PT_TREE_EXPANDED*
- Collapsed Image: *PT_TREE_COLLAPSED*
- End Node Image: *PT_TREE_END_NODE*
- Leaf Image Name: *PT_TREE_LEAF*

Image Height, and Image Width

Enter the size of the image that you want to appear on the tree. The default size is 12 by 15.

Page Size

Enter the page size for the tree. This is the size of the HTML area where the tree is displayed on the Installed Product Hierarchy page. To show the entire tree, enter zero (0).

Display Levels

Enter the maximum number of levels to display on the tree at any given time. To show all levels, enter zero (0).

Indent Pixels

Enter the number of pixels to indent each node. The recommended value is 20.

Runtime Search Options

When a user accesses the Installed Product Hierarchy page, the system displays the Product Name and Installed Product ID fields. To add additional search options to the page, select one or more of the check boxes that appear in this group box.

If you do not select any of the status check boxes, then the system hides the All and Single Status options and status drop-downs list boxes. If you select one or more status check boxes, the system combines the statuses when it prompts the user for a value.

Note. The system does not display the Show Department Criteria and Show Asset Statuses check boxes unless you have PeopleSoft HelpDesk installed

Setting Up Nodes for Installed Products

Access the Define Nodes page.

General Options **Define Nodes** Test Tree

Tree Name CORETREE Market Global

Description Core Tree

Node Setup Find | View All First 1 of 3 Last

*Tree Node Customer *Status Active

Node Parameters

Fields to Display Customize | Find | First 1-3 of 3 Last

*Sequence	Field Name	Display	Display Length	Display Field As	Order By	Order Sequence
1	Customer Name	<input checked="" type="checkbox"/>	30	Node Name	<input checked="" type="checkbox"/>	Ascending
2	Setid	<input checked="" type="checkbox"/>	5	Node Description	<input type="checkbox"/>	
3	Customer ID	<input checked="" type="checkbox"/>	15	Node Description	<input type="checkbox"/>	

Maximum Number of Rows To

*Display 50 Expand

*Fetch 50

Define Nodes page

This page enables you to establish nodes for customer, site, account, contact, department, employee, and installed product and children.

Node Setup

Tree Node

Select the type of node that you want to add to the tree. The system displays a list of fields associated with the node type in the Node Parameters - Fields to Display group box.

- *Account*: The system displays the Account ID (default) and Account Name fields.
- *Customer*: The system displays the Customer Name (default), Customer ID, and SetID fields.
- *Department*: The system displays the Description (default), Department ID, and SetID fields.
- *Employee*: The system displays the Employee Name (default) and Employee ID fields.
- *Site*: The system displays the Site Name (default), Site ID, and Address fields.
- *Installed Product and Children*: The system displays the Installed Product ID (default), Product Description (default), Status, Serial ID, and Asset Tag fields. This node is a required node. When adding a new tree definition, the system automatically adds this node.

Note. If there are multiple statuses for a single installed product, then the system displays *Multiple* on the tree.

Note. If PeopleSoft HelpDesk is not installed, then the system does not display the *Department* and *Employee* nodes in the Tree Node drop-down list. Also, if you establish nodes for *Customer*, *Site*, or *Account*, then the system does not permit you to establish nodes for either the *Department* or *Employee* nodes and vice versa.

Status Select the tree node's status; either *Active* or *Inactive*. For the node to appear on the tree, the status must be active.

Node Parameters - Fields to Display

Use the fields in this group box to indicate how you want the fields to display for the node you selected.

Sequence Enter a number to indicate the order in which you want the fields to appear on the tree.

Display Select this check box for all the fields that you want the system to display for the node.

Display Length The system displays the number of characters that it can display for the field. The system can connect in a series one or more fields on any of the Display Field As options. Each option, however, has a maximum concatenated display length. For *Node Name* the maximum is 30 characters. For *Node Description* the maximum is 40 characters. For *Mouseover Text* the maximum is 100 characters.

Display Field As Select an option to indicate how you want the system to display the field name. You can choose either *Node Name*, *Node Description*, or *Mouseover Text*. If you select *Mouseover Text*, the system displays the name of the field when a user moves their mouse over the node image whether it is a collapsed, expanded, or leaf image.

Note. Nodes always display text as < Node Name> – <Node Description>. Thus, all Node Name fields should be sequenced before entering node descriptions. The system forces you to enter it in this sequence if you make a mistake.

Order By and Order Sequence Select this check box if you want the system to order the nodes in the tree in either ascending or descending order. If you select the Order By check box for a field, then you must select either *Ascending* or *Descending* from the Order Sequence drop-down list box. The sequence number determines the order in which the system orders the fields if you select the Order By check box for multiple fields.

Maximum Number of Rows To

Display and Fetch Enter the maximum number of rows to display under the expanded node in the Installed Product Hierarchy. Then enter the maximum number of rows to fetch, or retrieve, from the database when the user clicks View All on the tree node.

Note. If you leave this field blank, the system retrieves 1000 rows. For the Installed Product and Children node, this value applies to the number of installed product records matching the search criteria, not the total installed product records in the entire family.

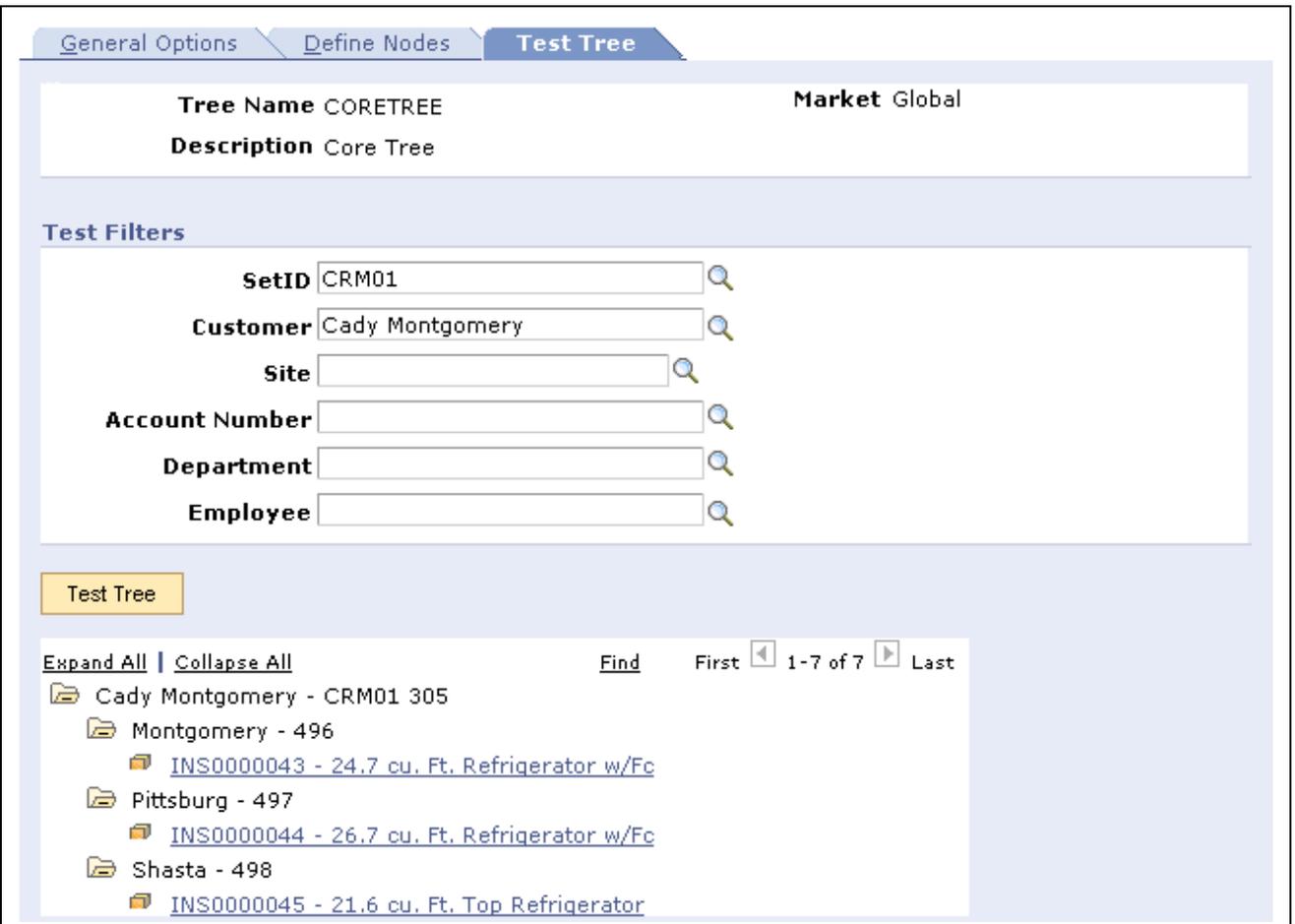
Expand

Select this check box if you want the system to automatically expand the node when a user accesses the tree. For all nodes other than the Installed Product and Children node, the system loads all parents and children despite the setting of this flag.

The system either collapses or expands each node as necessary based on the setting of this flag before display. For the Installed product and child nodes, however, the system loads the children upon demand if you do not select this check box for the node.

Testing Trees for Installed Products

Access the Test Tree page.



Test Tree page

1. Enter data into at least two of the fields in the Test Filters group box (at a minimum, one field must be SetID).
2. Click the Test Tree button.

The system verifies the tree configuration and displays that particular tree based on the criteria you entered. This is how the tree will appear on the Installed Product Hierarchy page.

Copying Trees

This section discusses how to copy a tree.

Page Used to Copy a Tree

Page Name	Object Name	Navigation	Usage
Copy Tree As	RF_IPRD_TREE_COPY	Set Up CRM, Product Related, Installed Product, Copy Tree, Copy Tree As	Copy an existing installed product tree setup to a new one.

Copying a Tree

Access the Copy Tree As page.



Copy Tree As page

To copy an existing tree, select a tree from the Copy Tree search page and then enter the name of the new tree in the New Tree Name field. Click Save.

Note. If the *Copy From* tree was the default tree for the market, then the system will not select the default flag for the new tree.

Configuring Roles

To configure roles for installed products, use the Installed Product Tree Roles (RF_IPRD_TREE_ROLE) component.

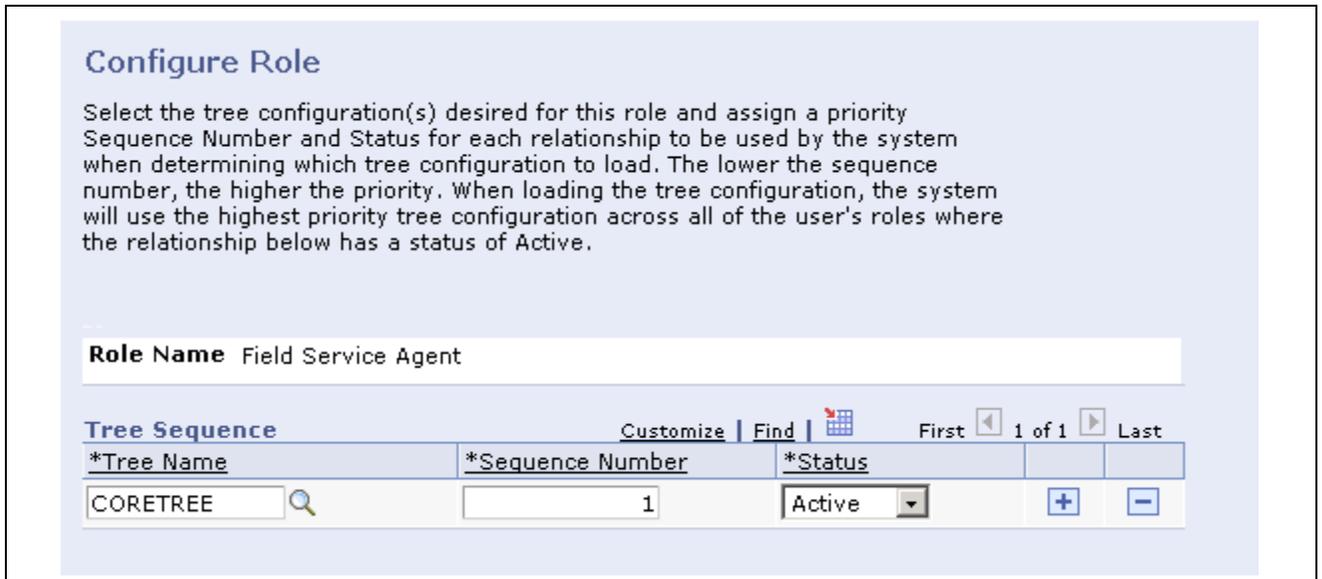
This section discusses how to configure roles for installed products.

Page Used to Configure Roles

Page Name	Object Name	Navigation	Usage
Configure Role	RF_IPRD_TREE_ROLE	Set Up CRM, Product Related, Installed Product, Configure Roles, Configure Role	Assign and prioritize installed product tree setups to a role.

Configuring Roles for Installed Products

Access the Configure Role page.



Configure Role page

Use this page to associate a given role with a tree configuration. The system uses this information to determine which tree configuration to display when a user accesses the Installed Product Hierarchy page.

Enter a sequence number for the tree so the system knows what tree to display when the user has multiple roles. You can also use the Status field to activate and inactivate trees as needed.

These are the steps that the system follows when selecting a tree configuration to load:

1. Select the tree associated with the user's role as specified on the Configure Roles page.
If the user has multiple roles defined, the system selects the tree having the lowest sequence number across all user roles that is also active. If multiple roles have the same sequence number, or if none are found, the system skips ahead to step 2.
2. Select the tree associated with the user's market that has the default flag selected.
If market is not assigned to the user's preferences or if no default tree is associated with the user's market, the system skips ahead to step 3.
3. Select the tree associated with the global market that has the default flag selected.
If none exists, the system skips ahead to step 4.
4. If no default tree exists for the global market, then the system creates a skeleton tree consisting of only the installed product and children node.

Setting Up Product Registration

Use the Product Registration page to specify the statuses for installed products and services by setID. You can also use this page to define the installed product fields that appear on the Product Registration Details page and indicate which fields are modifiable or read-only.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Setting Up Customer Self-Service,”
Setting Up Product Registration

Managing Installed Products

To manage installed products, use the Installed Product (RF_INST_PRODUCT) and Order Capture (RO_CAPTURE) components.

This section discusses how to:

- Enter installed product information.
- View preventive maintenance details.
- Enter attributes.
- View information about events, audits, cases, and service orders.

See Also

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, “Working with Future Dated Orders and Temporary Services”

Pages Used to Manage Installed Products

Page Name	Object Name	Navigation	Usage
Installed Product or Installed Assets	RF_INST_PRODUCT	<ul style="list-style-type: none"> Installed Product and Service, Installed Product HelpDesk, Installed Assets, Installed Assets 	Create or update installed products or assets to track products (physical items or services) that are installed at customer sites or issued to internal workers.
Installed Product Address	RF_IPRD_ADDR	Click the Address link on the Installed Product page.	Add or update addresses for installed products.
Line Details	RO_CAPTURELINE_DTL	Click the View Configuration link on the Installed Product page.	View order and configuration information that the system captures at the time of order entry for installed products that are ordered through PeopleSoft Order Capture or Order Capture Self Service. Note. The View Configuration link is only visible when the installed product is configurable (either Calico-configured or lite-package configured). The system hides the link if the product is not configured.
Preventive Maintenance Detail	RF_INST_PROD_PM	Installed Product and Service, Installed Product, Preventive Maintenance Detail	View or update pending preventive maintenance entries, or review the history of preventive maintenance entries for selected installed products.
Attributes	RB_ATTR_RUN_IPROD	Installed Product and Service, Installed Product, Attributes	Capture installed product data that is specific to business or industry requirements.
History	RF_INST_PROD_HIST	Installed Product and Service, Installed Product, History	View information about events, audits, cases, and service orders that is associated with the installed product.

Entering Installed Product Information

Access the Installed Product page.

Installed Product

Save | Search | Add | Next | Previous | 360 360-Degree View | Hierarchy | Personalize

Installed Product ID INS0300001

Customer [MMA Property Management Group](#)

Contact [Fred Albright](#)

Type Product

SetID CRM01

Customer Value Gold★★★★

Description 22.8 cu. Ft. Chest Freezer Man

Site Roseville

Installed Product
Preventive Maintenance Detail
Attributes
History

Customer Information

Customer [MMA Property Management Group](#)

Contact

Site

[Address](#)

Location Details

Account Number

Phone 651/785-6687

Account Status

Installed Product page (1 of 3)

Product Information

***Product ID**

Description Desktop CPU 450Mhz, 128 Mb RAM

Item ID

Serial ID

Manufacturer

Install Type

Date Ordered

Date Installed

Comments

Product Category

Item Description Desktop CP

Model

Parent Product

Date Shipped

Partner Information

Partner Company

Partner Contact

Status

*Status	Quantity	UOM	
<input type="text" value="Installed"/>	1.0000	EA	

Registration

Date Registered

Installed Product page (2 of 3)

Warranty Information	
Warranty Name	EXTENDED-COM
Status	Active
Start Date	09/12/2002
End Date	09/12/2007
Purchase Information	
Purchase Order	Authorization Code
Order ID	External Order ID
Purchased From	Purchased From Contact
Ownership	Sales Representative
Operating System	
Operating System	Version
Network	User Interface
Platform	Environment
Audit History	
Created	11/07/2001 1:29PM PST By SAMPLE
Modified	09/12/2002 6:20PM PDT By SAMPLE

Installed Product page (3 of 3)

Note. You can also add installed products from the 360-Degree View page.

Customer Information

Use the fields in this section to record information about the customer.

Note. For PeopleSoft HelpDesk, this section is labeled Administration Information. It includes many of the same field described below, including name, phone, department, and location.

If you enter this page through the Installed Product and Services page, the system displays the Customer and Contact fields. If you enter through the Installed Assets page, the system displays the First Name and Last Name fields. After the user selects an employee's first and last name using these fields, the selected employee's name appears as a link that transfers the user to the worker page for the corresponding employee. A transfer button for the person appears for installed products when there is a customer and contact, not installed assets.

Customer

Enter the customer who owns or leases the installed product. A customer can be a company, or consumer. Establish customers using the Customer enterprise integration point (EIP) or the Company or Consumer component under Customers CRM. Click the Customer link to access the record of the selected customer.

Site

Enter a site of the customer where the installed product is located. You set up sites for customers using the Company, Consumer, or Site component under Customers CRM. Click the Transfer to Site button to access the Site component.

Address

Click to access the Installed Product Address page and enter an address for the installed product. If you are entering asset information, the CRM system populates this field with the primary address of the worker or contact you select in the Name field. If you are entering a product or service, the system enters the site address of the customer or contact.

Name or Contact	Enter a contact of the customer or worker to whom the installed product is given or issued. On the Installed Product page, the system displays contacts for the selected customer. On the Installed Asset page, the system displays workers (employees) who are defined in the CRM system. Set up workers under Workforce, Worker. Establish contacts under Customer CRM, Contact (or Company, or Site). Click the Transfer to Contact button to access the record of the selected person.
	<hr/> Note. The system displays this field as Contact for installed products associated with a customer. <hr/>
Department	Enter the department that is associated with the internal worker to whom the installed asset is issued. Set up departments under Set Up CRM, Common Definitions, Employee Data, Department, Department.
Location	Displays the location of the selected worker. This information comes from the Location table.
Location Details	Enter notes about the specific area within the worker's internal location or the customer's site where the installed product is located.
Account Number and Account Status	Displays the customer's account number and status if there is one on record. If the account number appears as a link, you can click the link to transfer to the corresponding Account Details page.

Product Information

Use the fields in this group box to enter product information.

Note. If you are using this page to add a service, the system does not display the Item ID, Item Description, Serial Number, Date Shipped, and Date Installed fields.

For PeopleSoft HelpDesk, this section is labeled Asset Information. It includes most of the same fields described below.

Product ID	<p>Enter the ID of the product that is installed at the customer site or worker's internal location. Establish products using the Product EIP or the Product Definition component. If the product is associated with an item, the system populates the item ID as well.</p> <p>Under certain circumstances, the system displays a link next to the Product ID field. This link transfers users to the Service Management page in Order Capture to create a new order for the service. The system prepopulates the customer and product information. For the link to appear, the following must be true:</p> <ul style="list-style-type: none"> • The Installed product must be a service or an agreement. • The option to show the button must be selected in the configuration. • The installed product cannot have a parent installed product. • The user must have authorization to create a new service management order. • If entering an installed service (not an agreement), the product ID associated with the installed service must either have the Service Required flag selected or it must be a service-type product that is not a service feature.
-------------------	--

- Energy services are prohibited from using this link because the type of service management order cannot be determined automatically (start, stop or transfer service). Thus, this link is hidden for energy services.

Note. This link also appears as a button on the Installed Product Hierarchy.

View Configuration

Click to access the Line Details page of the order from which the installed product was created and view the product's configuration details.

Note. Configuration details are available only for configured products that are ordered through PeopleSoft Order Capture or Order Capture Self Service. This link is only visible if the installed product is configured.

Item ID

Enter the ID of the item that is installed at the customer site. Establish items using the Item Master EIP or the Item Definition component.

Serial ID

Enter the serial number if the item is serial-controlled.

Asset Tag

Enter the asset tag that is available if the item is issued an internal worker.

Manufacturer

Select the manufacturer of the product. You set up manufacturers on the Manufacturers page. Go to Set Up CRM, Common Definitions, Manufacturers.

Install Type

Select the reason why the product was installed at the customer site (for informational purposes only). Values are *Beta*, *Demo*, *Evaluation*, *Loan*, and *Sold*.

Parent Product

Enter another installed product to define as the parent of this installed product. View parent, child, and sibling relationships between installed products on the Installed Product Viewable Hierarchy page.

Date Ordered, Date Shipped, and Date Installed

Enter dates if you are creating or updating installed products manually. The system populates these fields, as applicable for the given transaction, when it creates or updates installed products.

Price Per Unit

Displays the price of the product per unit.

Recurring Price

Displays the recurring for the product or service if there is one on record.

Service Information

If the installed product is configured as a service rather than a product, this group box appears instead of the Product Information group box. Many of the same fields appear in both group boxes with the exception of the Start Date field, End Date field, and Create Order link, which only appear in the Service Information group box.

Create Order and Related Order

Click the Create Order link to go to the Manage Service - Entry Form page in PeopleSoft Order Capture. Use this page to create a new order or quote by entering order details and adding products or services to the order lines.

Click the Related Order link to view any outstanding orders related to the product or service.

Port-In Details

Use the fields in this group box to track port-in dates, port authorization codes (PAC), PAC dates, and temporary phone numbers for wireless carriers outside of the U.S. who authorize the transfer of mobile numbers from one carrier to another. The PAC Date is the date the current PAC expires. PAC dates are valid for 30 days from issue.

Note. PAC codes are issued by the existing carrier and are required by the new carrier. The PAC date is provided while porting-in the wireless number. The temporary phone number is assigned to the wireless service during mobile number portability. Port-in dates refer to the action of signing up for wireless service and using an existing mobile phone number. PAC Date is the date the current PAC expires. They are valid for 30 days from issue

Partner Information

Use the fields in this group box to select a partner company and contact that is associated with the sale or installation of the installed product.

Note. The system hides partner information if you are entering an asset.

Status

Status

Select the current status of the installed product. Delivered values include *Installed/Activated*, *Uninstalled/Deactivated*, *Shipped*, and *Pending*. The installed product status can be set manually or by system transactions.

Using the Define Status Translates page of the Installed Product Configuration component, you can set up a new set of status values as appropriate for the Installed Products component by setID when it is used in another industry.

For example, in PeopleSoft Support, when the Installed Service component (cloned from the Installed Products component) is used, you (as an implementer) can change the statuses to *Activated*, *Disconnected*, *Suspended*, *Resume*, and so on to better fit your business needs.

Note. You can use the Active Analytics Framework (AAF) to cascade the status of the parent installed product to its child installed products if the children's status is the same as the parent's. To do so, activate the delivered *Installed Product Cascade Status* policy, or create a new policy that uses *Installed Product Relationship* as an action in the policy.

Quantity

Enter the quantity (in the standard unit of measure) of the installed product in the indicated status. If the item is serial-controlled, the quantity is set to 1 by default.

You must enter a nonzero value for each row of status before saving the installed product. Multiple rows appear for partial shipments of an installed product order to indicate the status for each quantity.

You can add rows manually as necessary to indicate the quantity of an installed product in repair, uninstalled, and so forth.

UOM (unit of measurement) Indicates the unit of measure being used for the quantity. For example, package, each, pallets, and so on.

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

Registration

Date Registered Enter the date when the product is registered and the installed product is created or updated. If this installed product is registered using the Product Registration component, this field displays the date when the registration is submitted.

Warranty Information

Only one warranty can be associated with an installed product.

Note. If you are using this page to add a service, the system does not display this group box.

Warranty Name Enter the warranty that is associated with the item. Click the Transfer to Warranty button to access the component you use to define warranties.

Status Select the current status of the warranty for the installed product, either *Active* or *Inactive*. For entitlement searches from cases or service orders that reference an installed product, the system first checks for an active warranty that is valid for the current date.

Start Date and End Date Enter the dates when the warranty period begins and ends for the installed product. The system populates start date automatically using the install, ship, or order date for the installed product, depending on the start date option that the warranty definition specifies. The default end date is based on the length that the associated warranty definition specifies.

Purchase Information

Purchase Order Enter the customer's purchase order number for the installed product.

Authorization Code Enter the authorization code that the credit card company provides, if applicable.

Order ID Enter the order identification number for the installed product.

External Order ID Enter the customer's order identification number for the installed product, if it exists.

Purchased From Enter the name of the customer the installed product is purchased from.

Purchased From Contact Enter the name of the contact the installed product is purchased from.

Ownership Select whether the customer owns the installed product or possesses it under the terms of a lease or rental agreement.

Sales Representative Enter the name of the sales representative who is associated with the order for the installed product. If your installation includes PeopleSoft Sales, the system prompt for this field lists the people who are defined as sales force representatives in the system.

Operating System

The fields in this group box are relevant to installed computers, computer software, and computer accessories, and are for information purposes only. Enter or select the information from the fields that appear in this group box.

Note. If you are using this page to add a service, the system does not display this group box.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Creating and Managing Service Orders,” Service Order Toolbar Functions

Viewing Preventive Maintenance Details

Access the Preventive Maintenance Detail page.

Note. If you are adding a service or asset, the system does not display this page.

Installed Product

Save | Search | Add | Previous | 360 360-Degree View | Hierarchy | Personalize

Installed Product ID INS0000005	SetID CRM01
Customer Health Conscious.com	Customer Value Gold ★★★★★
Contact	Description 12000 BTU Room Air (Light Beig
Type Product	Site Hillsboro

Installed Product | **Preventive Maintenance Detail** | Attributes | History

Pending Preventive Maintenance Service Orders
Find | View All | First 1 of 1 Last

* Agreement Code <input type="text" value="COM-AGR-101"/>	* Renewal Number <input type="text" value="1"/>
* Line Number <input type="text" value="001"/>	Service <input type="text" value="PM for A/C"/>
* Business Unit <input type="text" value="US200"/>	* Status <input type="text" value="Pending"/>
Start Date <input type="text" value="05/10/2004"/>	Creation Date <input type="text" value="05/03/2004"/>
Comments <input type="text" value="Preventive Maintenance Schedule Created from Service Order Transaction"/>	

Preventive Maintenance History
Customize | Find | View All | First 1-2 of 2 Last

Date	Business Unit	Service Order ID	Status	Comments
02/19/2004	US200	SVC0300006	Completed	Service Order Completed on 2004-04-10
07/29/2002	US200		Canceled	Preventive Maintenance Schedule Canceled from Agreement Transaction

Preventive Maintenance Detail page

Use this page to view the preventive maintenance history of the installed product. You can also preview and update information about the upcoming preventive maintenance service using the agreement code, renewal number, line number, business unit, status start date, and creation date.

See *PeopleSoft Enterprise Integrated FieldService 9 PeopleBook*, “Working with Scheduled Preventive Maintenance,” Managing Scheduled Preventive Maintenance.

Entering Attributes

Access the Attributes page.

Installed Product

Save | Search | Add Install Product | Previous | 360 360-Degree View | Hierarchy | Personalize

Installed Product ID INS0300001 **SetID** CRM01
Customer MMA Property Management Group **Customer Value** Gold★★★★
Contact Fred Albright **Description** 22.8 cu. Ft. Chest Freezer Man
Type Product **Site** Roseville

Installed Product | Preventive Maintenance Detail | **Attributes** | History

Attributes

No valid Attributes found.

Attributes page

For information on configuring attribute for installed products, refer to the section below.

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

Viewing Information About Events, Audits, Cases, and Service Orders

Access the History page.

Installed Product

Save | Search | Add | Previous | 360 360-Degree View | Hierarchy | Personalize

Installed Product ID INS0000005 **SetID** CRM01
Customer Health Conscious.com **Customer Value** Gold★★★★
Contact **Description** 12000 BTU Room Air (Light Beig
Type Product **Site** Hillsboro

Installed Product | Preventive Maintenance Detail | Attributes | **History**

Events | Audits | **Cases and Service Orders**

Associated Cases Customize | Find | View All | First 1 of 1 Last

<u>120</u>	<u>Summary</u>	<u>Status</u>	<u>Date Created</u>	<u>Created By</u>	<u>Date Closed</u>
<u>120</u>	Room Air is not functioning	Open - New Case	06/13/2000	STEWART,TOM	

Associated Service Orders Customize | Find | View All | First 1-3 of 3 Last

Service Orders | Assignments | Sources | [Menu]

<u>SVC0300006</u>	<u>Service Description</u>	<u>Status</u>	<u>Date Created</u>	<u>Created By</u>	<u>Date Serviced</u>
<u>SVC0300006</u>	Preventive Maintenance Service for Air Conditioners	Closed	04/10/2004	Oprid for CRMSKT, CRMQABAK	04/12/2004
<u>SVC0300022</u>	Repair Air Conditioner	Open	04/10/2004	Oprid for CRMSKT, CRMQABAK	04/12/2004
<u>SVC0300021</u>	Repair Air Conditioner	Open	04/10/2004	Oprid for CRMSKT, CRMQABAK	04/12/2004

History page

Events

Click the Events link to view events that are associated with the installed product. To filter events that appear in the grid, enter dates in the From Date and To Date fields and then click Refresh.

The system displays these events as delivered:

- A high-level view of each service activity, which includes new orders as well as change orders (for services only).

- The status of business projects, including links to the Business Project Status page (for services only).
- Installed product creation dates and the people who created the installed products.
- Changes in status, showing the old and new values.
- Changes in the parent-installed product ID, showing old and new values.
- Employee and department transfers, including old and new values (for assets only).
- Changes in the configuration code, showing the old and new values (for Calico-configured products only), including links to display the old and new configuration.
- Changes to information that is associated with the installed product, including customer, contact, site, partner, and partner contact.

If you want to configure additional events to appear in the Events group box, use Active Analytics Framework (AAF).

See *PeopleSoft Enterprise Components for CRM 9 PeopleBook*.

Audits

Click the Audits link to display changes to the records and fields that are associated with the installed product. The system displays previous and new values for the fields that have changed. The system displays all fields from both the installed product main record as well as the installed product status record.

Note. At delivery, auditing is turned off by default. It must be enabled using PeopleSoft Application Designer. The audit record for Installed Product is RF_INST_PROD_AT. This record contains the fields from the records on which auditing must be enabled, if desired: RF_INST_PROD (the main installed product record), RF_INST_PROD_ST (the status record), and RF_INST_PROD_PM (the preventive maintenance record).

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up Auditing for Cases and Inbound Email”.

Cases and Service Orders

Click the Cases and Service Orders link to view the cases and services orders that are associated with the installed product, service, or asset. The system displays the case and service order IDs and provides links to the Case and Service Orders pages.

Within the Associated Cases group box, the system displays a summary of the case, the status, the date the case was created, who created the case, and the date the case was closed.

The Associated Service Orders group box has three tabs:

- On the Service order tab, the system displays a description of the service, the status, the date the service order was created, who created the service order, and the date that the customer was provided service.

Note. The Service Date field displays the latest end date time log entry, if available. If it is not available, the system populates the field with the customer preferred end date. If that is not available, the system populates the Service Date field with the committed restore date. And finally, if the committed restore date is not available, the system populates the Service Date field with the last modified date when the service order status is equal to closed.

- On the Assignments tab, the system displays the name of the provider group and the assigned technician.
- On the Sources tab, the system displays whether the service order was created from a case, an order, or a request for preventive maintenance.

The Material Orders link appears preceding the Associated Service Order group box. Click this link to go to the Installed Product Material page, which contains grids for the used and removed materials for each associated service order. Each grid includes the service order ID, created date, item ID, item description, and quantity (used or removed).

Viewing Installed Products

This section discusses how to use the installed product viewable hierarchy.

Page Used to View the Installed Product Hierarchy

Page Name	Object Name	Navigation	Usage
Installed Product Hierarchy	RF_INSTPROD_VH_SEC	Click the View Hierarchy button from the Installed Product, Service Order, My Service Order, Support Case, HelpDesk Case, RMA (return material authorization), Site (under Customers CRM), Product Registration Installed Assets, Search Installed Products and Services, Search Installed Assets, Customer 360 Degree View, Worker 360 Degree View, Order Capture Entry, Self-Service Accounts, Self-Service View Services, Self-Service Support Case, and Self-Service HelpDesk Case pages.	View the installed products that meet the customer or internal worker, site, product, serial number, asset tag, and department criteria that is available on the source page. For the installed products that the system returns, you can also view record status and parent, child, and sibling relationships to other installed products.

Using the Installed Product Hierarchy

Access the Installed Product Hierarchy page.

Installed Product Hierarchy page

Note. This hierarchy is not available for service orders or cases, if they are configured to hide installed product information (through the corresponding service order or call center configuration templates). There are additional runtime filters that you can turn on using the Tree Configuration: Department (if PeopleSoft HelpDesk installed) and Account.

Filters	Displays the values that are available on the source page that the system used to filter the initial view of the hierarchy.
All Statuses and Single Status	Select the status of the installed products that should be included in the hierarchical view.
	Note. If you select Single Status, you can also use either the equal to (=) or not equal to (not =) operator to select a status for which you want to search for a product.
Refresh	Click to update the display after specifying alternate status values.

The system displays the Installed Product ID (always), Description (always), Site, Department, and Account fields for each installed product that meets the filter criteria. The system only displays these fields (Site, Department, and Account) if they are configured to display when you define the tree setup and department. In addition, these filters are available only if you have PeopleSoft HelpDesk installed. Click the link of an installed product to access the Installed Product page, where you can update information as necessary.

Asset	Any technology device, such as a computer, peripheral, or router.
Remote Control	The ability to remotely take control of a computer system.
ITAM	Information Technology Asset Management.

Enabling Integration to the Asset Repository Module in PeopleSoft Financials

Enabling integration between CRM and Financials occurs on the Installed Product Configuration page, which is keyed by setID.

To enable integration:

1. Navigate to Set Up CRM, Product Related, Installed Product, Configuration.
2. In the Integration Options group box, select the Enable Asset Integration with PeopleSoft Financials check box.

The check box that controls the display of the installed asset serial ID is automatically selected, since the PeopleSoft Financials application requires serial ID values for all hardware assets.

See *Enterprise PeopleTools PeopleBook: Integration Broker*

Running the Initial Data Synchronization

To synchronize all desired asset data between Financials and CRM on a newly implemented system:

1. Use PeopleTools Integration Broker to activate the location, department, and worker messages.
2. In the Financials application, navigate to Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish.
3. Publish using these messages in this order:
 - Manufacturer data: MANUFACTURER_FULLSYNC
 - Asset Subtype data: COPY_AM_SUBTYPE
 - Asset Full Sync data: COPY_IT_ASSET
4. Inactivate the FULLSYNC messages and activate the corresponding SYNC messages.

Processing the messages in the order given creates records for these data, in this order:

1. Employee, department, and location data.
2. Manufacturer data and asset subtype data.
3. Financials asset repository data.

Records created in this order ensure that the data is validated.

Synchronizing data in this order ensures that the relevant data referred to on the Financials assets, such as department, employee, and manufacturer, has corresponding entries on the CRM side. Without such corresponding data on the CRM side, the full synchronization might attempt to create a CRM installed asset for an employee that does not exist in CRM, which would cause an error.

See *PeopleSoft Enterprise Maintenance Management: Documentation Update on Maintenance Management Integration with CRM*

See *PeopleSoft Enterprise Components for CRM 9 PeopleBook: Activating Integration Points*

See *PeopleSoft Enterprise Components for CRM 9 PeopleBook, "Using the Effective Date Publish Utility," Performing a Full Data Publish of Current Effective Data*

See *Enterprise PeopleTools PeopleBook: Integration Broker*

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” Data Integrations.

See *PeopleSoft Enterprise Integrated FieldService 9 PeopleBook*, “Integrating with PeopleSoft Applications,” Integrating with PeopleSoft Financial Management Services.

Pages Used to Map and Reconcile Asset Information

Page Name	Object Name	Navigation	Usage
Product Mapping for Hardware Assets	RF_PROD_MAP	Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Asset Product Mapping, Product Mapping for Hardware Assets	Associate a match for non-null fields to create a new installed asset on the CRM side.
Asset Reconciliation	RF_ASSET_RECON	HelpDesk, Asset Reconciliation, Asset Reconciliation	Display all possible matching CRM entries and provide action buttons to either merge or create new CRM assets.

Assigning New Product IDs to New Asset Entries

Access the Product Mapping for Hardware Assets page.

Product Mapping for Hardware Assets
SetID SHARE

Asset Mapping to Product Customize | Find | View All First 1-10 of 52 Last

Asset Subtype	Manufacturer ID	Model	*Product ID	Product Description
			USA100	Computer Package
DESKTOP	COMPAQ	Armada M700	ARM100	Compaq Armada M700
DESKTOP	COMPAQ	Compaq Deskpro	ARM101	Compaq Deskpro
DESKTOP	COMPAQ	Compaq Evo D510 CM	ARM102	Compaq Evo Series
DESKTOP	COMPAQ	Deskpro	ARM101	Compaq Deskpro
DESKTOP	COMPAQ	Deskpro EN Series	ARM101	Compaq Deskpro
DESKTOP	COMPAQ	EVO D510 CMT	ARM102	Compaq Evo Series
DESKTOP	COMPAQ	Evo D510 SFF	ARM102	Compaq Evo Series
DESKTOP	COMPAQ	Evo N400c	ARM102	Compaq Evo Series
DESKTOP	COMPAQ	Evo N410c	ARM102	Compaq Evo Series

Add Product Mapping Entry

Product Mapping for Hardware Assets page

Use this page to map a combination of the three FMS fields (Asset Subtype, Manufacturer, and Model) to a CRM product ID value as part of the asset integration between the two systems.

On all installed product entries, CRM requires a product ID but FMS does not associate a product ID to its asset entries. This map specifies how the CRM system should assign a product ID to each CRM-installed asset entry that is created from FMS asset data.

The Asset Subtype, Manufacturer, and Model fields on this page refer to the identically defined fields from PeopleSoft FMS Asset Management.

Note. To capture product asset information from FMS that does not map to the installed product entries in CRM, leave the Asset Subtype, Manufacturer, and Model fields blank in the first row on this page and only enter a Product ID. When no matches are found on asset data in CRM, the system provides the information from FMS to this product ID by default.

Reconciling Asset Information

Access the Asset Reconciliation page.

Asset Reconciliation
Select Match or Create New

Serial ID A43-22342 **Department** Human Resources
Tag Number **Location**
Employee ID KU0015 **Product** Compaq Deskpro

Possible Installed Asset Matches Customize | Find | View All |  First ◀ 1-2 of 2 ▶ Last

	Serial ID	Asset Tag	Employee	Department	Location	Product ID	Description
<input type="radio"/>		IT-0003837	Carmichael Espinosa	Human Resources	Corporation Headquarters	ARM101	Compaq Deskpro
<input type="radio"/>		IT--00034872	Carmichael Espinosa	Human Resources	Corporation Headquarters	ARM101	Compaq Deskpro

Asset Reconciliation page

Select the option associated with the asset that best matches the data that has come over from your FMS database. This information is displayed in the top portion of the page. Then click one of the buttons at the bottom of the page to either merge the selected asset or create a new asset.

Merge Selected Installed Asset

Click this button if the FMS data matches the asset data on the CRM side and you want to create a CRM-installed asset row based on the values from the selected FMS row.

Create New Installed Asset

Click this button if the FMS data does not refer to any asset on the CRM side and you want to create a CRM-installed asset row based on the values from the selected FMS row.

APPENDIX A

Product Delivered Web Services

This appendix discusses the delivered Installed Product and Product Service web services, and provides guidelines on how to view message elements.

Delivered Web Services

This section discusses:

- The Installed Product web service.
- The Product Service web service.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Working with Business Processes and Web Services”

Installed Product Web Service

PeopleSoft CRM delivers these service operations for the Installed Product web service:

- Create Installed Product

This operation creates an installed product using the existing component interface (CI) in the CRM system. The component provides normal defaulting and processing. The return message indicates success or failure and includes the installed product ID and setID.

- Get Installed Product

This operation requires a setID and installed product ID. The CI is used so that all security is enforced.

- Search Installed Product

Similar to the agent-facing installed product search, you can send various types of data in your request. This operation returns a list of installed products that meet all the given criteria.

- Update Installed Product

This operation updates an installed product using the existing CI in the CRM system. The component provides normal defaulting and processing. The return message indicates success or failure and includes the installed product ID and setID.

These usage rules apply to the Update Installed Product service operation:

- If no update is intended for any row in a child rowset (status, warranty, or attribute), you may omit all the rows for that child rowset and the existing child rows will be retained.

For example, if there are five status rows and you send zero status rows in the update, the existing five status rows are retained without change. However, if there is an update needed for any single row in the status rowset or warranty rowset, you must provide all rows in that rowset, regardless of whether they all have an update or not. If there are five status rows and you want to change one, add one, and delete one, send the full set of final rows (the one that has the changed value, the three that remain unchanged, and the one new one).

- The attribute rowset is included to allow you to set and change values of attributes for existing installed products.
- No attributes can be deleted.
- Because we do not allow deletes for the attribute rowset, it is sufficient to send only the changed entries or the new entries if there is an update or add required for the attribute rowset.

For example, if there are five attribute rows and one needs an update, you only need to send the row that has the update. The four other existing rows are retained and untouched.

This table provides the technical names, operation type, and message names of the service operations that are related to the Installed Product web service:

Service Operation	Operation Type	Request Message	Response Message
Create Installed Product (RF_INST_PROD_CREATE)	Synchronous	RF_INST_PROD_CREATE_REQ	RF_INST_PROD_CREATE_RES
Get Installed Product (RF_INST_PROD_GET)	Synchronous	RF_INST_PROD_GET_REQ	RF_INST_PROD_GET_RES
Search Installed Product (RF_INST_PROD_SEARCH)	Synchronous	RF_INST_PROD_SEARCH_REQ	RF_INST_PROD_SEARCH_RES
Update Installed Product (RF_INST_PROD_UPDATE)	Synchronous	RF_INST_PROD_UPDATE_REQ	RF_INST_PROD_UPDATE_RES

Product Service Web Service

PeopleSoft delivers these service operations for the Product Service (CO_PRODUCT) web service:

- Get Product Details

This operation takes a product ID and returns information about the matching product.

- Get Terms And Conditions Synchronization Search

This operation takes a product ID and returns information about the terms and conditions that apply to the matching product.

- Get Catalog

This operation takes a catalog ID and returns information about the matching catalog.

- Search Financial Product

This operation takes search parameters (product ID, setID, product description, product package, arrangement, and coverage) that are entered for products and returns a list of matching financial products.

- Search Product

This operation takes search parameters (product ID, setID, description, product type, and effective status) that are entered for products and returns a list of matching products.

This table provides the technical names, operation type, and messages names of the service operations that are related to the Product Service web service:

Service Operation	Operation Type	Request Message	Response Message
GetProductDetails (CO_PROD_ITEM_SYNC_SEARCH)	Synchronous	CO_PROD_ITEM_REQ	CO_PROD_ITEM_RSP
Get Terms And Cond Sync Search (CO_PROD_TERMS_COND_SYNC_SEARCH)	Synchronous	CO_PRD_TERMS_COND_REQ	CO_PRD_TERMS_COND_RSP
GetCatalog (CO_PRODUCT_CATALOG_SYNC_SEARCH)	Synchronous	CO_PRD_CATALOG_REQ	CO_PRD_CATALOG_RSP
SearchFinancialProduct (CO_PRODUCT_FSI_SEARCH)	Synchronous	CO_PROD_FSI_SRCH_REQ	CO_PROD_FSI_SRCH_RSP
Search (CO_PRODUCT_SEARCH)	Synchronous	CO_PRODUCT_SEARCH_REQ	CO_PRODUCT_SEARCH_RSP

Viewing 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 the name of the message you want to view in the Message Name field and click Search.
3. The Message Definition page appears. Click the message name link under the Parts grid.

The system opens the Message Definition page in a new browser. This step is required only if you selected a *container* message. If you selected a *parts* message in step 2 above, proceed directly to step 4.

Note. The system utilizes both *container* messages and *parts* messages. A *container* message may contain one or more parts. The *parts* message has the actual list of data fields.

4. 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	<p>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.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>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.</p>
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 <i>receivables specialist</i> . 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 <i>detailed business process</i> .
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 <i>course</i> .
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 <i>sub-classification</i> .
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 <i>copy</i> 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 <i>population</i> and <i>division</i> .
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 <i>communication key</i> .
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 <i>comm keys</i> or <i>speed keys</i>) 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 <i>population</i> and <i>cohort</i> .
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 <i>Enterprise Incentive Management ledger</i> . 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 <i>donor pyramid</i> 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 <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . 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 <i>General Ledger Interface process</i> . 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 <i>update access</i> .
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 <code>ADVANCED_SHIPPING_ORDER</code> 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 <i>key performance indicator</i> . 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 <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . 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 <i>rates</i>) 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 <i>learning management system</i> . 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 <i>1</i> —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 <i>3C engine</i> .
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 <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> 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 <i>SQLExec</i> 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 <i>need analysis</i> .
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 <i>compensation object</i> .
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 <i>event</i> .
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 <i>division</i> and <i>cohort</i> .
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 <i>record input value-added tax flag</i> . 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 <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
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 <i>real-time event notification server</i> 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 <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . 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	<p>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.</p> <p>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.</p>
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 <i>communication key</i> .
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 <i>basis</i> 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	<p>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).</p> <p>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).</p>
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 <i>Communications, Checklists, and Comments engine</i> . 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 <i>Communications, Checklists, and Comments group</i> . 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 <i>locked</i>) 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 <i>inquiry access</i> .
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 <i>value-added tax exception</i> . 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 <i>value-added tax exempt</i> . 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 <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . 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 <i>eXtended Process Integrator</i> . 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 <i>zero-rated value-added tax</i> . 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.

Index

A

Actions page 62
additional documentation xiv
Advisor Dialog field 102
application fundamentals xiii
ASN (automatic shipping notification) 114
Assemblies - Assembly page 42
Assemblies - Component Notes page 42, 45
Assemblies - Components page 42, 44
Assemblies - Summary page 42
Assembly field, Package Components page 76
Assembly Qty field, Assemblies - Summary page 43
Asset Reconciliation page 155, 156
attachment, product definition 70
Attachments page 62
Attribute Definition page 13
Attributes page 62, 141
AUTO_NUM_PNL 13
AUTO_NUM_PNL component 12
automatic shipping notification, *See* ASN
autonumbering
product IDs 13

B

branch script, uses of 11
Branch Scripts page 62
business process 157
Business Unit table 76

C

Catalog Template Setup component 88
catalogs
access channels for, defining 102
access from PeopleSoft CRM portal 86
business rule association 99
cache, populating 100
catalog display templates, creating for 87
catalog tree 101
cloning 103

conditions for associating products with 106
contents, defining 100
creating nested 108
defining permissions 107
direct association 99
IDs, defining 100
images, displaying 91
PeopleSoft Real-Time Advisor dialogs, associating with 102
prerequisites 86
searching 111
security memberships 99
understanding 85
use in PeopleSoft Order Capture 85
use in PeopleSoft Order Capture Self-Service 86
use in PeopleSoft Sales 86
Clone a Catalog page 100, 103
comments, submitting xviii
common elements xviii
Competencies page 13
COMPETENCY_TABLE 13
COMPETITOR_CD 13
COMPETITOR_CD component 12
Competitors page 13, 62
Component ID field, Assemblies - Summary page 43
component interfaces, in integrations 59
components, in product packages 74
Configure Role page 139
Configured Package field, Product Definition page 65
contact information xviii
Copy Tree As page 138
cross-references xvii
Customer Connection website xiv

D

Define Nodes page 133
Define Status Translates page 128
Definition page 62
definitional elements
creating 12
installation options 14

- product definition 58
 - product groups 16
 - relations 20
 - understanding 11
 - Display Template page 88
 - display templates
 - catalog display pages, defining 88
 - creating 88
 - default 89
 - featured products, defining 96
 - for product comparison 92
 - product detail, specifying 95
 - product display, defining 90
 - search catalogs, defining 97
 - understanding 87
 - documentation
 - printed xiv
 - related xiv
 - updates xiv
- E**
- EIPs (enterprise integration points)
 - ESA_PROPOSAL_PRICE 60
 - inventory business unit 77
 - Item Master 23
 - OC_ESA_PROPOSAL 60
 - OC_ESA_PROPOSAL_RESPONSE 60
 - OC_ESA_PROPOSAL_STATUS 60
 - PRODUCT_FULLSYNC 59
 - PRODUCT_SYNC 59
 - PRODUCT_SYNC_EFF 59
 - use of 58
 - EN_BOM_INQ_D_TXT 46
 - EN_BOM_INQ_HEADER 46
 - EN_BOM_INQUIRY 46
 - EN_BOM_INQUIRY_D 46
 - EN_BOM_MAINT 42
 - EN_BOM_TEXT 42
 - EN_COMP_MAINT 42
 - EN_COMP_TEXT 42
 - engagement services 7
 - Enterprise Integration Points, *See* EIPs (enterprise integration points)
 - ESA_PROPOSAL_PRICE EIP 60
 - External Description page 62
- F**
- Featured Products page 88, 96, 100, 108
 - featured products, in product catalog 108
 - Find Products page 111
- G**
- General Options page 133
 - glossary 161
- H**
- hardware asset information mapping and reconciliation 121
 - History page 141
- I**
- images
 - attaching to products 70
 - displaying in catalog 91
 - Images page 62
 - implementations
 - items 4
 - products 4
 - Increment field, units of measure 74
 - installed assets, understanding 119
 - Installed Product Address page 141
 - Installed Product Defaults page 13, 123
 - Installed Product Hierarchy page 151
 - Installed Product or Installed Assets page 141
 - Installed Product page 141
 - installed product web service
 - create 157
 - get 157
 - search 157
 - update 157
 - installed products
 - attributes, entering 148
 - conditions for creating 10
 - creation and update 114
 - default creation and update rules, defining 123
 - defining 141
 - defining rules 69
 - hierarchy, viewing 151
 - PM details, viewing 148
 - product-specific creation and update rules, defining 126
 - system-created service orders 115
 - understanding 113
 - usage 113
 - warranty activation 116

- Installed Products page 62
 - integrations
 - items overview 3
 - product packages with PeopleSoft SCM 59
 - products overview 3
 - with PeopleSoft Proposal Management 60
 - with SCM systems 58
 - INV_ITEM_GROUP 26
 - INV_ITEM_UOM 36
 - INV_STOCK_TYPE 26
 - item assemblies
 - component details, defining 44
 - component details, viewing 47
 - component notes, adding 45
 - component summaries, specifying 42
 - component summaries, viewing 46
 - understanding 41
 - Item Balance by Business Units page 52, 53
 - Item Balance by Group Members page 52, 53
 - Item Definition page 29
 - Item Family page 26, 27
 - Item Group page 26, 27
 - Item ID field, Definition page - Product 65
 - Item Number Control page 26
 - Item Substitutes page 29
 - ITEM_NBR_CONTROL 26
 - items
 - associating with units of measure 36
 - autonumbering, specifying 26
 - availability inquiries, understanding 49
 - balance information by business units, checking 53
 - balance information by group members, checking 53
 - balance inquiries by business units, understanding 50
 - balance inquiries by group members, understanding 51
 - checking balances and availability 49
 - defining 29
 - defining control values for 25
 - description of 8
 - errors retrieving item balances, viewing 54
 - in Integrated FieldService 9
 - integrations 3
 - item families, defining 27
 - item groups, defining 27
 - list of statuses 24
 - overview 3, 23
 - relationship with products 9
 - stock types, defining 28
 - substitutes, establishing 35
- L**
- Line Details page 141
 - Linked Products page 13
- M**
- Membership List page 100
 - Model field, Product Definition page 65
- N**
- Nested Catalogs page 100, 108
 - notes xvii
 - notes, defining for product 81
- O**
- OC_ESA_PROPOSAL EIP 60
 - OC_ESA_PROPOSAL_RESPONSE EIP 60
 - OC_ESA_PROPOSAL_STATUS EIP 60
 - Order Capture Attributes field 68
 - Order field, Package Components page 76
- P**
- Package Component Pricing page 77, 78
 - Package Components page 75
 - package products 8
 - PeopleBooks
 - ordering xiv
 - PeopleCode, typographical conventions xvi
 - PeopleSoft Advanced Configurator, for configured packages 65
 - PeopleSoft Enterprise CRM
 - items overview 3
 - products overview 3
 - PeopleSoft Enterprise Sales, accessing catalogs from 86
 - See Also Sales*
 - PeopleSoft Integrated FieldService, requiring items 14
 - PeopleSoft Order Capture Self-Service, accessing catalogs 86

- PeopleSoft Order Capture, accessing catalogs 85
- PeopleSoft Real-Time Advisor
 - associating dialogs with catalogs 102
 - use in catalogs 85
- PeopleSoft Supply Chain Management (PeopleSoft SCM)
 - integration with products 14
 - product pricing 76
- prerequisites xiii
- Preventive Maintenance Detail 141
- printed documentation xiv
- PROD_BRAND 13
- PROD_BRAND component 12
- PROD_CATEGORY 13
- PROD_FAMILY_INV 26
- PROD_GROUP_TBL 13
- PROD_GROUP_TBL component 12
- PROD_GRP_OVERVIEW 13
- PROD_INSTALL 123
- PROD_INSTALLATION 13
- PROD_INSTALLATION component 12
- PROD_NOTE 82
- PROD_PRICE 77
- PROD_SUBSCRIPT 13
- PRODKIT_COMPS_PRC 77
- Product Association page 100, 105
- Product Attributes by UOM page 73
- Product Brand page 13
- Product Catalog page 100
 - See Also* catalogs
- product catalogs
 - creating nested 108
 - defining cache 100
 - defining catalog id 100
 - defining product association 105
 - identifying featured products 108
 - identifying recommendations 108
 - setting up user permissions 107
- Product Category page 13
- Product Compare page 88, 92
- Product Definition - Actions page 67
- Product Definition - Attachments page 69
- Product Definition - Attributes page 68
- Product Definition - Branch Scripts page 70
- Product Definition - Competitors page 72
- Product Definition - Definition page 62
- Product Definition - External Description page 66
- Product Definition - Images page 70
- Product Definition - Installed Product page 69, 123, 126
- Product Definition - Product Groups page 71
- Product Definition - Regions page 71
- Product Definition component
 - Actions page 62
 - Attachments page 62
 - Attributes page 62
 - branch scripts 62
 - Competitors page 62
 - Definition page 62
 - External Description page 62
 - Images page 62
 - Installed Product page 62
 - Product Groups page 62
 - Regions page 62
- product definition types 57
- product definitional elements, *See* definitional elements
- Product Details page 88, 95
- Product Display page 88, 90
- Product Group page 13, 16
- Product Groups page 62
- Product Installation page 13, 14
- Product Mapping for Hardware Assets page 155
- Product Notes page 82
- product packages
 - configured 65
 - defining components for 74
 - process for defining 58
 - viewing pricing details 78
- Product Price page 77
- product pricing, specifying details 78
- Product Relations Codes page 13
- Product Relationships page 80
- Product Search page 88, 97
- product searching, overview 110
- product web service
 - get catalog 158
 - get details 158
 - get terms and conditions synchronization search 158
 - search financial product 158
 - search product 159
- PRODUCT_FULLSYNC EIP 59
- PRODUCT_SYNC EIP 59
- PRODUCT_SYNC_EFF EIP 59

products

- accessing 58
- alternate relationships 14
- and product definitions 57
- assigning unit of measure 73
- associating with items 65
- attributes 21
- availability in regions 71
- competitors 72
- component interfaces 59
- configured packages 65
- creating definitional elements 12
- defining associations for catalogs 105
- defining notes 81
- defining relationships 79
- duration of service 66
- group types 71
- integrations 3
- overview 3
- package pricing 64
- pricing 76, 77
- process 58
- product definition 61
- product group association 71
- product ID 58
- relationship types 79
- relationship with items 9
- relationships between 20
- saving without items 66
- searching 111
- searching catalogs for 110
- setting up 11
- standalone 64
- tax classification 66
- types of 7
- understanding 7, 57
- using agreement templates to define 66

R

RB_ATTR_RUN_IPROD 141

RB_ATTRIBUTE component 12

RB_ATTRIBUTE_MAIN 13

RB_REGION component 12

RB_RELATIONS 13

RC_BS_MAIN 13

Recommendation page 100, 108

recommendations, in product catalog 108

Region Based field 102

Region page 13

Regions page 62

related documentation xiv

Relations page - Product 20

relationships

- product 79
- products and items 9
- with alternate product 14

Relationships Overview page 80

return material authorization, *See* RMA

Return Message from Inventory page 52

Return Message From Inventory page 54

Review Assemblies - Assembly page 46

Review Assemblies - Component Notes page 46

Review Assemblies - Components page 46, 47

Review Assemblies - Summary page 46

RF_INST_PROD_HIST 141

RF_INST_PROD_PM 141

RF_INST_PRODUCT 141

RF_INSTPRD_DFLT 13, 123

RF_IPRD_ADDR 141

RF_IPRD_CONFIG 128

RF_IPRD_CONFIG_ST 128

RF_IPRD_TREE_COPY 138

RF_IPRD_TREE_DEFN 133

RF_IPRD_TREE_NODE 133

RF_IPRD_TREE_ROLE 139

RF_IPRD_TREE_TEST 133

RF_ITEM_DEFN 29

RF_ITEM_SUB 29

RF_ITM_BAL_MSG1 52

RF_ITM_BAL_MSG2 52

RF_ITM_BAL_MSG3 52

RF_STOR_LOC_RST 52

RMA 25

RO_CAPTURELINE_DTL 141

RO_CAT_CLONE 100

RO_CAT_SEC 100

RO_DISPLAY_TEMPL 88

RO_FEATURED_PRD 100

RO_NEST_CAT 100

RO_PRD_ASSOCIATION 100

RO_PRD_CATALOG 100

RO_PRODUCT_COMPARE 88

RO_PRODUCT_DETAIL 88

RO_PRODUCT_DISPLAY 88

RO_PRODUCT_FEATURE 88

RO_PRODUCT_SEARCH 88

RO_RECOMMENDATION 100

RSEC_MEMBER_SMRY 100

runtime performance, improving 68
RX_PROD_SRCH 111

S

Script page 13
searches
 advanced 112
 basic 111
 product catalog search collections 110
Security Membership page 100, 107
service
 agreements 8, 66
 products 8
Set Up Options page 128
Setup Auto Numbers page 13
Setup Manager 4
standard products 8
Stock Type page 26, 28
subscription 22
subscription product 8
Subscription Terms page 13
subscriptions
 product data 59
Substitutes page 35
suggestions, submitting xviii

T

templates, display templates for catalogs,
 See display templates
terms 161
Test Tree page 133
typographical conventions xvi

U

Unit of Measure page 36
units of measure (UOMs)
 adding 36
 associating items with 36
 product 58, 73
Units of Measure page 36

V

Verity searches
 in product catalogs 110
visual cues xvii

W

warnings xvii
web service 157