
PeopleSoft Enterprise CRM Enterprise Pricer 9 PeopleBook

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PeopleSoft Enterprise CRM Enterprise Pricer 9 PeopleBook
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About This PeopleBook

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

This preface discusses:

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

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

PeopleSoft Enterprise Application Prerequisites

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

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

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

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

Application Fundamentals

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

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

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 Pricer for CRM Preface

This preface discusses:

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

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

PeopleSoft Application Fundamentals

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

PeopleSoft CRM Application Fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the CRM product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire PeopleSoft CRM system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook

PeopleSoft CRM Automation and Configuration Tools

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

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

- Correspondence management.
This part discusses manual notifications and correspondence requests.
- Automation tools.
This part discusses PeopleSoft CRM workflow, component event processing, business projects, and scripts.
- Configuration tools.
This part discusses configurable search pages, configurable toolbars, attributes, and industry-specific field labels and field values.
- Knowledge Management.
This part discusses 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

CHAPTER 1

Getting Started with PeopleSoft Enterprise Pricer

This chapter provides an overview of PeopleSoft Enterprise Pricer and discusses implementing PeopleSoft Enterprise Pricer.

Understanding PeopleSoft Enterprise Pricer

PeopleSoft Enterprise Pricer enables real-time dynamic pricing for quotes and orders based on your company pricing policies. You can define rules that determine what discounts, surcharges, or giveaways apply under specific order conditions, such as products ordered, customer, customer region, and so on. The functionality is designed for pricing and marketing managers and includes the capability for development, testing, deployment, and maintenance of price lists, rules, and arbitration plans.

PeopleSoft Enterprise Pricer consists of pricing elements that you use to create your pricing structure:

- Price lists.

These enable you to select products and conditions where the price list should be overridden. During a transaction, the system determines the product price based on either the predefined search hierarchy for the transaction or on 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 rules.

These define the conditions that must be met before the adjustments are applied to the base price. Multiple rules can apply when conditions of each rule are met.

- Arbitration plans.

These define how the price rules are applied to the base price when the transaction is priced.

- Pricing simulator.

This enables you to test your pricing scenarios to determine whether the pricing adjustments create the desired results.

When you set up your pricing scenario, set up the pricing elements in this order:

1. Price lists.
2. Price rules.
3. Arbitration plans.

Once you have set up all three elements, you can test the pricing elements using the pricing simulator.

Note. PeopleSoft Enterprise Pricer does not implement business unit or setID security.

Integrating with PeopleSoft Enterprise Pricer

PeopleSoft Enterprise Pricer integrates with these PeopleSoft applications:

- PeopleSoft CRM Order Capture.
- PeopleSoft CRM Order Capture Self Service.
- PeopleSoft CRM Mobile Order Capture.
- PeopleSoft CRM Marketing offers.

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

See *PeopleSoft Enterprise CRM 9 Mobile Applications PeopleBook*.

See *PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook*.

Implementing PeopleSoft Enterprise Pricer

PeopleSoft Enterprise Pricer does not require table-loading implementation steps. In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface of this PeopleBook, with information about where to find the most current version of each.

See “PeopleSoft Enterprise Pricer for CRM Preface,” page xvii.

CHAPTER 2

Implementing PeopleSoft Enterprise Pricer

This chapter discusses how to:

- Establish price by key and price list fields.
- Configure PeopleSoft Enterprise Pricer.
- Add price by key fields.

Establishing Price By Key and Price List Fields

The section provides an overview of PeopleSoft Enterprise Pricer setup, lists common elements, and discusses how to:

- Define price by keys.
- Define price list fields.

Understanding PeopleSoft Enterprise Pricer Setup

When setting up PeopleSoft Enterprise Pricer, you must establish price by key fields and price list fields for each transaction that is priced. The person who administers PeopleSoft Enterprise Pricer should set these up when you implement the application. These pages are accessed again; however, it's important that you understand how these pages are used to create a pricing structure.

Price lists are groups of date-controlled product prices that are defined by currency code and linked to related business objects or price rules. These product prices are intended to replace the product list price when they are associated with a transaction by way of the related business objects or price rules.

Price list-related business objects are objects to which you can associate a price list. The business objects are a subset of price by fields that are already defined for the transaction. A price list can have more than one related business object, such as customer, customer group, product ID, and business unit. The system uses the appropriate pricing transaction to determine the available price list related business objects.

The system attempts to match a particular transaction to one or more price lists based on the transaction values and the price list related business objects. For example, if you are taking an order for customer ABC and customer ABC is defined as a related business object for a specific price list, that price list applies to this order. Furthermore, if any product on the order appears on this price list, the price from the price list is used as the base price for all further pricing calculations, instead of the product's list price. If more than one applicable list is found, the price list lookup that is defined for that transaction on the Price By Key Field page determines which price is used:

- Look up in priority order.

The system performs a search to match the related business objects in the defined priority order and then selects the first list price that it finds.

Note. This option is used in PeopleSoft Customer Relationship Management (PeopleSoft CRM).

- Consider all prices

The system performs a search to match the related business objects and their price lists and then selects the lowest price. This option is used in PeopleSoft Supply Chain Management (PeopleSoft SCM).

The Transaction Price by Keys page is used to define the fields used to match a transaction. At implementation time, select from the delivered list of price by keys for each transaction.

If PeopleSoft Enterprise Pricer is configured, you can expand the list of price by keys. A knowledgeable PeopleSoft application developer or IT person should complete the configuration.

Common Element Used in This Section

Transaction to be Priced Determines the appropriate list of price by keys to use to price transactions.
Value is:

OC (order capture): Price PeopleSoft Order Capture transactions.

Pages Used to Establish Price by Key and Price List Fields

Page Name	Object Name	Navigation	Usage
Price Key Fields	EOEP_APPKEY_FIELD	Set Up CRM, Product Related, Enterprise Pricer, Transaction Price-by Keys, Price-by Key Field	Select the price by fields that are used to price the transaction.
Price List Fields	EOEP_APPLIST_FLDS	Set Up CRM, Product Related, Enterprise Pricer, Transaction Price-by Keys, Price List Fields	Select valid price list-related business objects that are used when creating price lists.

Defining Price by Keys

Access the Price Key Fields page.

Price Key Fields | Price List Fields

Transaction: OC | Description: Order Capture

Price-by Key Fields | Customize | Find | View All | First 1-20 of 30 Last

Record	Field Name	Description	Prompt Table
RB_PRC_DERIVED	BO_ID_PARTNER	BO ID Partner	RO_PK_PBOID_VW
RB_PRC_DERIVED	BO_ID_SOLD	Sold To Business Object ID	RO_PK_BO_VW
RB_PRC_DERIVED	CUSTOMER_GROUP	Customer Group	RO_PK_CUSTGP_VW
RB_PRC_DERIVED	INV_ITEM_ID	Item ID	RO_PK_ITEM_VW
RB_PRC_DERIVED	PARTNER_LEVEL	Partner Level	RO_PK_PLVEL_VW
RB_PRC_DERIVED	PARTNER_PGM_ID	Partner Program ID	RO_PK_PPGM_VW
RB_PRC_DERIVED	PARTNER_SUBTYPE	Partner Subtype	RO_PK_PSUB_VW
RB_PRC_DERIVED	PARTNER_TYPE	Partner Type	RO_PK_PTYPE_VW
RB_PRC_DERIVED	POSTAL	Postal Code	
RB_PRC_DERIVED	PROD_COMPONENT_ID	Product Component ID	RO_PK_COMP_VW
RB_PRC_DERIVED	PROD_TYPE	Product Type	RO_PK_PRDTYP_VW
RB_PRC_DERIVED	PRODUCT_GROUP	Product Group	RO_PK_PGRP_VW
RB_PRC_DERIVED	RA_OFFER_ID	Offer ID	RO_PK_OFFER_VW
RB_PRC_DERIVED	RBTACTION_CODE	Action Code	RO_ACTION_VW
RB_PRC_DERIVED	RBTCATEGORY	Category	RO_PK_CATG_VW
RB_PRC_DERIVED	RBTSUBCATEGORY	Sub Category	RO_PK_SBCATG_VW
RB_PRC_DERIVED	REGION_ID	Region ID	RO_PK_REGN_VW
RB_PRC_DERIVED	RO_ONE_TIME	One Time Payment Schedule	RO_PK_ONETME_VW
RB_PRC_DERIVED	SHIP_TO_CUST_ID	Ship To Customer	RO_PK_SHIPTO_VW
RB_PRC_DERIVED	SOLD_TO_CUST_ID	Sold To Customer	RO_PK_SOLDTO_VW

Build Price-by Key Fields

Select Price-by Key Fields

Price Key Fields page

Price-by Key Fields Displays the current price by fields for the transaction.

Build Price-by Key Fields Click to add fields to the Price-by Key Fields grid after selecting them from the Select Price-by Key Fields grid.

Note. If a price by field is currently assigned to a price rule or an arbitration plan, you cannot remove it from the list of values assigned to the pricing transaction.

Select Price-by Key Fields Use to select additional price by fields.

Note. You can define an unlimited number of pricing keys; however, system performance is affected as the number of keys increases.

Defining Price List Fields

Access the Price List Fields page.

Price Key Fields		Price List Fields	
Transaction	Description		
OC	Order Capture		
Price List Lookup	Lookup in priority order		
Price-by Key Field Names by Priority			
*Key field code	Priority		
Sold To Customer	50	+	-
Region ID	70	+	-
Business Unit	80	+	-
BO ID Partner	10	+	-
Partner Level	20	+	-
Partner Type	30	+	-
Partner Subtype	40	+	-
Customer Group	60	+	-

Price List Fields page

Price List Lookup

Select how you want the system to perform price list lookup. Values are:

Consider all prices: The system considers all matching price lists based on the related business objects and price rules that you have attached to the price lists. It then selects the lowest price for the product.

Lookup in priority order: The system establishes the order for the price list lookup based on the values in the Price-by Key Field Names by Priority section. Use this method to establish a hierarchical method for selecting the list price for the transaction.

Note. When using the hierarchical method, price rules tied to price lists are not used, unless a price is not found using the hierarchical method.

Key Field Code

Select price by keys to define the valid related business objects for a price list. These values are available to you as related business objects on the Price List Related Object page.

Priority

Establish a hierarchical order to price list lookups by entering a numeric value. This field is available only if you select *Lookup in priority order* in the Price List Lookup field.

Configuring PeopleSoft Enterprise Pricer

The general PeopleSoft Enterprise Pricer user should not have access to these pages. These pages are available to the PeopleSoft Enterprise Pricer developer to modify or configure the PeopleSoft Enterprise Pricer system data. You can configure the PeopleSoft Enterprise Pricer data entry pages, but you should not be required to use a standard implementation of PeopleSoft Enterprise Pricer. The system data described in this section are delivered for each pricing transaction implementation.

This section discusses how to:

- Configure price-by key fields.
- Configure price transaction code options.

Warning! Changes made to the pages in this section are considered a configuration and are not supported by PeopleSoft.

Pages Used to Configure PeopleSoft Enterprise Pricer

Page Name	Object Name	Navigation	Usage
All Price-by Key Fields	EOEP_KEYFLDS	Set Up CRM, Product Related, Enterprise Pricer, All Price-by Key Fieldnames, Price-by Keyfields	Select fields to use as price-by key fields for all PeopleSoft Enterprise Pricer implementations. The values are delivered as system data during installation.
Price Transaction Code	EOEP_APP_CODE	Set Up CRM, Product Related, Enterprise Pricer, Price Transaction Code	Configure the PeopleSoft Enterprise Pricer data entry pages for each application code and relate the transaction to another transaction.

Configuring Price-by Key Fields

Access the All Price-by Key Fields page.

All Price-by Key Fields			Customize	Find	View All	First	1-20 of 30	Last
*Record	*Field Name	Description						
RB_PRC_DERIVED	BO_ID_PARTNER	BO ID Partner						
RB_PRC_DERIVED	BO_ID_SOLD	Sold To Business Object ID						
RB_PRC_DERIVED	CUSTOMER_GROUP	Customer Group						
RB_PRC_DERIVED	INV_ITEM_ID	Item ID						
RB_PRC_DERIVED	PARTNER_LEVEL	Partner Level						
RB_PRC_DERIVED	PARTNER_PGM_ID	Partner Program ID						
RB_PRC_DERIVED	PARTNER_SUBTYPE	Partner Subtype						
RB_PRC_DERIVED	PARTNER_TYPE	Partner Type						
RB_PRC_DERIVED	POSTAL	Postal Code						
RB_PRC_DERIVED	PROD_COMPONENT_ID	Product Component ID						
RB_PRC_DERIVED	PROD_TYPE	Product Type						
RB_PRC_DERIVED	PRODUCT_GROUP	Product Group						
RB_PRC_DERIVED	RA_OFFER_ID	Offer ID						
RB_PRC_DERIVED	RBTACTION_CODE	Action Code						
RB_PRC_DERIVED	RBTCATEGORY	Category						
RB_PRC_DERIVED	RBTSUBCATEGORY	Sub Category						
RB_PRC_DERIVED	REGION_ID	Region ID						
RB_PRC_DERIVED	RO_ONE_TIME	One Time Payment Schedule						
RB_PRC_DERIVED	SHIP_TO_CUST_ID	Ship To Customer						
RB_PRC_DERIVED	SOLD_TO_CUST_ID	Sold To Customer						

All Price-by Key Fields page

Note. In certain situations, you might need to add additional price by key fields that aren't available on this page. Adding data here is considered a configuration.

Record Select the record for the price by key fields and select a corresponding Field Name for the Price-by Key field.

Configuring Price Transaction Code Options

The options for each transaction are delivered as system data and appear on the online pricing pages. They also determine how PeopleSoft Enterprise Pricer is used to price each transaction.

Access the Price Transaction Code page.

Transaction	*Description	Parent
OC	Order Capture	

Valid Action Types Customize | Find | View All | First 1-10 of 10 Last

Action Type		
Discount/Surcharge		
Free Period Promotion		
Product Add		
Recurring Discount/Surcharge		
Price Override		
Giveaway		
Total Order Discount/Surcharge		
Min/Max Target Price		
Min/Max Target Discount		
Min/Max Target Surcharge		

Valid Adjustment Methods Customize | Find | View All | First 1-2 of 2 Last

Adjustment Method		
Cascading		
Summed		

Price Transaction Code page (1 of 2)

Valid Price Types Customize | Find | View All | First 1-2 of 2 Last

Price Type		
Extended Price		
Quantity		

Transaction Code Options Customize | Find | View All | First 1 of 1 Last

Options		

Valid Price Dates Customize | Find | View All | First 1 of 1 Last

Price Date		

Price Transaction Code page (2 of 2)

The options for each transaction are delivered as system data and appear on the Price Rule Formulas page. This table lists the options set up for each transaction:

Transaction	Buying Agreement	Order Capture	Sales Order	Sales Order Batch
Price Action Type	Note. Inherits all options from the sales order transaction.	<ul style="list-style-type: none"> • Discount /Surcharge • Giveaway • Min/Max Target Discount • Min/Max Target Price • Min/Max Target Surcharge • Price Override • Total Order Discount /Surcharge • Product Add • Recurring Discount /Surcharge • Free Period Promotion 	<ul style="list-style-type: none"> • Discount /Surcharge • Giveaway • Min/Max Target Discount • Min/Max Target Price • Min/Max Target Surcharge • Price Override • Total Order Discount /Surcharge • Product Add • Free Period Promotion 	Note. Inherits all options from the sales order transaction.
Price Type		<ul style="list-style-type: none"> • Extended Price • Quantity 	<ul style="list-style-type: none"> • Extended Price • Quantity • Volume • Weight 	
Cascading/Summed		Yes Options include: <ul style="list-style-type: none"> • Cascading • Summed 	Yes Options include: <ul style="list-style-type: none"> • Cascading • Summed 	
Promotion Code		No	Yes Populated if PeopleSoft Promotion Management is installed.	
Use Grace Days Use Grace Days		No	Yes	

Transaction	Buying Agreement	Order Capture	Sales Order	Sales Order Batch
Merchandising Type		No	Yes Populated if PeopleSoft Promotion Management is installed.	
Period-to-Date		Not applicable	Yes	
Stop Processing Here		Yes Options include: • Yes • No	Yes Options include: • Yes • No	
Distribution Accounts		No	Yes	
Payment Terms		No	Yes	
Price Dates		No	Yes Options include: • Requested Arrival Date • Order Date • Schedule Ship Date	

Parent

Select a value if you want the transaction to inherit all of the attributes and price by keys of the parent.

Action Types

Select valid price action types for the transaction and limit the available options during price rule and arbitration plan entry. The values that you select are available for the price rule price action type. Values are:

Discount/Surcharge: Applies a discount or surcharge to the list price on a line.

Recurring Discount/Surcharge: Applies a discount or surcharge to the recurring price on a line.

Free Period Promotion: Specifies the number of free periods of a recurring price. The period used is what appears on the order. For example, if you select three free periods and the rule is used on an order with a cell phone for 30 USD per month, then the first three months are free.

Product Add: Adds a product to the order, such as a cancellation penalty product.

Giveaway: Adds a free product to the line or order.

Min/Max Target Discount (minimum/maximum target discount): Compares the total discount adjustment and, if it's outside the limit, the system discards the calculated amount and replaces it with the target discount.

Min/Max Target Price (minimum/maximum target price): Compares the price adjustment and, if it's outside the specified range, the system discards the calculated amount and replaces it with the target amount.

Min/Max Surcharge (minimum/maximum surcharge): Compares the total surcharge adjustment and, if it's outside the specified range, the system applies a target surcharge.

Price Override: Replaces the price on a product with this price.

Total Order Discount/Surcharge: Applies a discount or surcharge to the entire order.

Price Type

Select a value that will be available when you select the price rule price type. Values applicable to PeopleSoft CRM are *Extended Price* and *Quantity*.

Options

Select values, and the system will display the appropriate processing fields on the price rule pages. Values are:

Use Payment Terms on Formula: Select the payment for each adjustment from the list of values on the Payment Terms page in PeopleSoft Billing. If the order or schedule has more than one price rule with a payment term that qualifies for the order, the system selects the most favorable terms for the customer.

Use Period-to-date: Enables the system to use period-to-date pricing to calculate price adjustments based on transactions across a predefined time frame, rather than individual transactions.

Use Promotion Code: Use if PeopleSoft Promotions Management is installed and you want to associate promotions on the price rule.

Use Rule Distribution Accounts: View and create accounting distribution details for the adjustments on the price rule.

Note. These values are not applicable to PeopleSoft CRM.

Price Date

Select the dates available to price the transaction from the available options:

Order Date: The date the order header is created. The system uses the current date as the default date on a sales order header, but you can enter another date.

Requested Arrival Date: The date that the customer wants the order to arrive on site. This option is used only by PeopleSoft SCM installations.

Schedule Ship Date: The date that the order line is scheduled to ship. The system calculates this date from the requested arrival date using the transit lead time and exception ship dates, but you can enter another date. This option is used only by PeopleSoft SCM installations.

Note. These values are not applicable to PeopleSoft CRM.

Adding Price by Key Fields

You might need to add more price by keys than those delivered with the system data. Add these using the All price by Key Fields page. The following steps provide an example of how to add item weight. You can follow the same steps to add other fields.

Note. Adding price by key fields is considered a customization.

Follow these steps to add item weight as a pricing key to PeopleSoft Enterprise Pricer:

1. Add the INV_ITEM_UOM record and the SHIPPING_WEIGHT field on the All Price-by Key Fields page.
2. Assign the new SHIPPING_WEIGHT field to the transaction code that you are using on the Price-by Key Field page.

Select the new SHIPPING_WEIGHT field from the list at the bottom of the page. Click the Build Price-by Key fields button to associate the new field to the transaction code.

3. If the new field requires a table to prompt for valid values when the pricing key is used on the price rule, create a view and assign the prompt table to the pricing key on the Price-by Key Field page.

This is the same page you used in step 2.

If no prompt table is assigned to a pricing key, you can enter any value on the price rule for that field.

You may need to modify the PeopleCode to recognize the new pricing key. When a new pricing key is added to the list of available keys and it is assigned to a transaction code, it may require a change to the PeopleCode method used to pass a value to that new pricing key. The following method in PeopleSoft CRM contains the logic used to pass a value for each pricing key defined for the Order Capture transaction code. If a new pricing key is added to the transaction code, you should review the following PeopleCode program to make sure that the pricing key is used by the system:

- Application Package: RB_PRICER:PricingUtil:InputList
- Method:CreatePricingKeysLocal()

This method is used to assign a value from PeopleSoft Order Capture to each pricing key defined for the Order Capture transaction code. If multiple pricing keys are defined for the same record, you modify the PeopleCode only once. Subsequently, you can select any field from that record as a pricing key without having to modify the code. You can modify the code in CreatePricingKeysLocal() to handle all the fields from a specific record without having to specify the field name.

In other cases, the value for a field will require more logic to determine what value to assign to the pricing key. If you must add a new record for which all the fields can be used as pricing keys to the PeopleCode, you use the same logic and add a new condition to the Evaluate logic. For example, if you need to add multiple fields from record INV_ITEM_UOM to the list of pricing keys, you can add the following condition:

```
When Record.INV_ITEM_UOM
    &recItemUom = createrecord(RECORD.INV_ITEM_UOM);
    &recItemUom.SETID.value = %Super.ProductSetid;
    &recItemUom.INV_ITEM_ID.value = %This.GetInvItemId(&recLine.PRODUCT_ID.Value);
    &recItemUom.UNIT_OF_MEASURE.value = &recLine.UNIT_OF_MEASURE.value; =>

    &recItemUom.SelectByKey();
```

```

    &strValue = &recItemUom.GetField(@"FIELD." | &strFieldname).Value;
    Break;

```

You can add the PeopleCode once and then use any field from record INV_ITEM_UOM as a pricing key.

Example

The following example shows the code that you need when more logic is needed in order to determine the value for a specific pricing key. When the pricing key is INV_ITEM_UOM.SHIPPING_WEIGHT, you can run the method `GetWeight()` to calculate the weight for the item.

```

When Record.INV_ITEM_UOM
    Evaluate &strFieldname
    When Field.SHIPPING_WEIGHT
        &strValue = %This.GetWeight(&recLine.PRODUCT_ID.value, &recLine.UNIT_⇒
OF_MEASURE.value);
        Break;

```

This is the existing and new code for the customization:

```

rem =====
rem Method:      CreatePricingKeysLocal
rem
rem Description: Pass the pricing key information to the engine.
rem =====;
method CreatePricingKeysLocal
    /* &objLine as EOEP_PRICER:DataStructure:Line, */
    /* &recLine as Record */
    Local integer &iCount, &iCount2;
    Local Record &recAppkeyFld, &recDestination;
    Local string &strFieldname, &strValue, &strVoid;
    Local number &numBO, &numShipToBoid, &numProfileSeq;
    Local boolean &bRetVal;
    Local RO_CAPTURE:BusinessLogic:Records:Destination &objDestination;
    Local array of string &arrReturn;

    For &iCount = 1 To &c_rsPricingKeys.ActiveRowCount
        &recAppkeyFld = (&c_rsPricingKeys)(&iCount).PW_PRCKEY_VW;
        &strFieldname = &recAppkeyFld.FIELDNAME.Value;
        &strValue = "";

        When Record.RO_HEADER
            rem -----;
            rem Copy key value from header ;
            rem -----;
            &strValue = %Super.HeaderRec.GetField(@"FIELD." | &strFieldname).Value;
            Break;

        When Record.INV_ITEM_UOM
            rem -----;
            rem Copy key value from Inventory Item UOM ;

```

```

rem -----;
&recItemUom = createrecord(RECORD.INV_ITEM_UOM);
&recItemUom.SETID.value = %Super.ProductSetid;
&recItemUom.INV_ITEM_ID.value = %This.GetInvItemId(&recLine.PRODUCT_⇒
ID.Value);
&recItemUom.UNIT_OF_MEASURE.value = &recLine.UNIT_OF_MEASURE.value;    ⇒

&recItemUom.SelectByKey();
&strValue = &recItemUom.GetField(@"FIELD." | &strFieldname).Value;
Break;
.
.
.

End-Evaluate;

If &strValue <> "" Then
    %This.AddPricingKey(&objLine, &recAppkeyFld.EOEP_KEY_FLD_CD.Value, &str⇒
Value);
End-If;
End-For;

```

This is the new code for the customization to retrieve values from the table and pass them to the pricing engine:

```

When Record.INV_ITEM_UOM
    rem -----;
    rem Copy key value from Inventory Item UOM                ;
    rem -----;
    &recItemUom = createrecord(RECORD.INV_ITEM_UOM);
    &recItemUom.SETID.value = %Super.ProductSetid;
    &recItemUom.INV_ITEM_ID.value = %This.GetInvItemId(&recLine.PRODUCT_⇒
ID.Value);
    &recItemUom.UNIT_OF_MEASURE.value = &recLine.UNIT_OF_MEASURE.value;    ⇒

    &recItemUom.SelectByKey();
    &strValue = &recItemUom.GetField(@"FIELD." | &strFieldname).Value;
    Break;
    .
    .
    .

End-Evaluate;

```


CHAPTER 3

Creating Price Lists

This section provides an overview of price lists and discusses how to set up price lists.

Understanding Price Lists

Price lists are groups of date-controlled product prices that are defined by currency code and linked to existing price rules for related business objects. These product prices are intended to replace the product list price when they are associated with a transaction via the related business objects or price rules.

Price list-related business objects are a subset of the existing transaction price by fields. They are used to define objects (which can be associated with a price list) to look up a list price. A price list can have more than one related business object, such as customer, customer group, product ID, and business unit.

The system uses the appropriate pricing transaction to determine the available price list related business objects. The system attempts to match a particular transaction to one or more price lists based on the transaction values and the price list related business objects. For example, if you are taking an order for customer ABC and customer ABC is defined as a related business object for a specific price list, that price list applies to this order. Furthermore, if any product on the order appears on this price list, the price from the price list is used as the base price for all further pricing calculations, instead of the product's list price. If more than one applicable list is found, the price list lookup defined for that transaction determines which price is used:

- Look up in priority order.

The system performs a search to match the related business objects in the defined priority order and then selects the first list price that it finds.

- Consider all prices.

The system performs a search to match the related business objects and their price lists and then selects the lowest price.

After locating the base price for the product, the system performs a separate search of the price rules to find the appropriate adjustments to that price. If you haven't set up price lists or if the system fails to find the product on an active relevant list, the system uses the list price defined for the product as the default base price for any further price adjustments.

Setting Up Price Lists

To set up price lists, use the Price List (EOEP_PRICE_LIST) component.

This section lists common elements and discusses how to:

- Establish price lists.
- Define related business objects.

Common Elements Used in This Section

Status	<p>Values are:</p> <p><i>Active:</i> Product prices on this list automatically supersede the product list price in transactions involving any related business objects.</p> <p><i>Inactive:</i> This list is ignored when calculating product prices.</p>
Product	Use to search for a product ID, enter a new product ID, and view the product IDs in a price list.
Unit of Measure	Each list price is defined by the unit of measure. The unit of measure must be valid for that product, as defined in the product master.

Pages Used to Set Up Price Lists

Page Name	Object Name	Navigation	Usage
Price List	EOEP_PRICE_LIST	Pricing Configuration, Price List	Use to define a price list. You can set up price lists in multiple currencies and create start and end dates for each product's price.
Product Notes	EOEP_PRC_LIST_NOTE	Click the Recurring Note button on the Price List page.	Create and view product notes associated with a recurring price. These notes are used for information only and are separate from the standard product notes in the product definition component.
Related Objects	EOEP_PRCLST_ATTCH	Pricing Configuration, Price List, Related Objects	Associate a price list with related business objects, such as a customer, customer group, or region. Also associate price rules directly to a price list.
Search	EOEP_SEARCH_PAGE	Click the Find External Resource button on the Related Objects page.	Search for existing values for the field names on the Related Objects page.

Establishing Price Lists

Access the Price List page.

The screenshot displays the 'Price List' page with the following details:

- Price List ID:** RETAIL
- Currency Code:** USD
- SetID:** CRM01
- *Description:** Retail
- *Status:** Active
- Search:** Product ID (begins with), Description (contains)
- Add Product:** New Product ID field with an 'Add' button
- Pricing Information:** Table with columns: Product ID, Description, *UOM, Start Date, End Date, List Price, Frequency. One row is visible with Start Date: 05/22/2008.

Price List page

Currency Code

Use to establish the same price list with the same price list ID in multiple currencies. The price list is considered if the transaction is entered in the same currency as that of the price list.

Note. In PeopleSoft CRM, if a price is not available in a price list using the transaction currency but a price list is available for the base currency, the system accesses the price from the price list in the base currency and converts it to the transaction currency. The currency is converted as long as conversion rates are defined between the transaction and base currencies. You must also define rate types for the customer and business unit for the currency conversion.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up Currencies," Calculating Currency Exchange.

Search**Search**

Click to select the price list detail based on the search criteria and to view additional price list information. The price list detail appears on the Pricing Information tab. Click the Clear Search button to remove the search criteria.

Description

Search for products using elements of the product description or product ID.

Add Product**Add**

Click after you enter the product ID to add the product to the price list.

Pricing Information Tab

Select the Pricing Information tab.

Error

If an error exists in the price list definition, a red square box appears in this column. This field is visible only if an error exists. For example, if you entered an invalid value, the line is marked as an error. Correct the error as necessary.

- UOM (unit of measure)** Use to define a list price for a particular UOM for that product.
- Start Date and End Date** Use to define the effective period (start and end dates) for the list price entry.
- List Price** Use to enter a list price for the products on the price list.
- Frequency** Use to select a recurring frequency in PeopleSoft Order Capture. If you select this option, the amount in the List Price field represents a recurring charge. If you do not select this option, the list price represents a one-time charge.
Valid options include *Annually, Daily, Monthly, Quarterly, and Weekly.*

Additional Information Tab

Select the Additional Information tab.

Recurring Note Click this button to enter and view notes relating to recurring charges for the product. These notes are informational only and are separate from the standard product notes defined in the product definition component.

Protected If you select the check box, the system does not apply adjustments to the price. The price protected flag on the transaction is activated.

Note. If a product with the same price is on two different price lists and one is price protected, the price protected one is used in the transaction.

Defining Related Business Objects

Access the Related Objects page.

The screenshot shows the 'Related Objects' page for a price list. At the top, there are tabs for 'Price List' and 'Related Objects'. Below the tabs, a table displays the price list details: Price List ID (RETAIL), Currency Code (USD), and SetID (CRM01). The description is 'Retail' and the status is 'Active'. Below this, there are three main sections: 'Related Business Objects', 'Related Objects', and 'Related Price Rule'. The 'Related Business Objects' section shows 'Transaction: Order Capture'. The 'Related Objects' section has a table with columns 'Field Name', 'Identifier', and 'Match these Values'. One entry is 'Business Unit' with identifier 'APP01' and a search icon. The 'Related Price Rule' section has a table with columns 'Rule' and 'Description', showing 'DEM001' for both.

Related Objects page

Transaction This value is provided by default. It determines the list of available values to select in the Related Objects group box.

Field Name Select a value to tie a business object to the price list. Define the valid list for the pricing transaction when you set up PeopleSoft Enterprise Pricer. Values include *Business Unit, Customer Group, Region ID, Sold To Customer* for the SO (sales order) transaction, and *Business Unit, Customer Group, Region ID, and Sold To Customer* for the OC (order capture) transaction.

Identifier

Enter values for the business object, or click the Find External Resource button to search for values.

If the field name and identifier criteria match those on a particular transaction, this price list is considered for that transaction.

Rule

Select a price rule to associate the price list to the price rule.

When you directly associate a price rule with the price list, the price rule conditions define the part of the transaction that must match in order for this price list to be considered at pricing time.

CHAPTER 4

Creating Price Rules

This chapter provides an overview of price rules and discusses how to set up price rules.

Understanding Price Rules

The price rule defines the conditions of the transaction that must be met before the adjustments are applied to the base price. The price rule is made up of one or more price conditions and one or more price formulas. The price condition defines the set of circumstances that make a price rule applicable to a transaction. The price formula defines the actions that occur when the pricing conditions are met.

Setting Up Price Rules

To set up price rules, use the Price Rule (EOEP_RULE) component.

This section discusses how to:

- Establish price rule conditions.
- Establish price rule formulas.

Pages Used to Set Up Price Rules

Page Name	Object Name	Navigation	Usage
Conditions	EOEP_CONDITION	Pricing Configuration, Price Rule, Conditions	Select the price by fields, values for the price by fields, and the operator (which determines how the price by fields are related to the transaction).
Formulas	EOEP_FORMULA	Pricing Configuration, Price Rule, Formulas	Define the actions that take place when the price rule conditions are met.
Search	EOEP_SEARCH_PAGE	Click the Search icon on the Conditions page.	Search for valid values for the selected price by field in the price rule condition.

Establishing Price Rule Conditions

Access the Conditions page.

Transaction	Price Rule	Description	SetID
Order Capture	ENG000002	Surge Protection Off	ENRGY

Mode: Advanced [Change to Basic mode](#) Save Price Rule As...

Rule Attributes

*Status: Deployed

Description: ENG000002

*Short Description: Surge Protection Off

Conditions page (1 of 2)

Rule Conditions [Customize](#) | [Find](#) | [First](#) | 1-2 of 2 | [Last](#)

Field Name	Identifier	Match these Values
Product ID	EN100104	Surge Protection
Offer ID	ENG0250003	\$25 OFF INITIAL COST - SURGE PROTECT

Combined Conditions [Customize](#) | [Find](#) | [First](#) | 1-4 of 4 | [Last](#)

Select	Match these Values
<input type="checkbox"/>	Product ID is equal to any in the list Surge Protection
<input type="checkbox"/>	Offer ID is equal to any in the list \$25 OFF INITIAL COST - SURGE PROTECTION
<input type="checkbox"/>	Product ID is equal to any in the list Surge Protection
<input type="checkbox"/>	Offer ID is equal to any in the list \$25 OFF INITIAL COST - SURGE PROTECTION
<input type="checkbox"/>	AND Product ID is equal to any in the list Surge Protection

And/Or: Build Rule Definition

Rule Definition

The transaction contains the following:

Offer ID is equal to any in the list
\$25 OFF INITIAL COST - SURGE PROTECTION

AND

Product ID is equal to any in the list
Surge Protection

Conditions page (2 of 2)

Enter the conditions for the price rule in basic or advanced mode. Basic mode enables you to create price rules using the *And* operator. Advanced mode enables you to create more complex conditions. You can use the *Or* operator, in addition to the *And* operator. Advanced mode enables you to enter the valid values directly for the price by fields without having to go through the search or prompt page for the field.

To add a price rule condition in basic mode:

1. Select basic mode by clicking the Basic link on the Conditions page.

2. Select a transaction.

This transaction determines the valid price by field names available for the conditions.

Note. In PeopleSoft CRM installations, this field is read-only. The default value is *Order Capture*.

3. Change the default status from *Pending* to *Deployed*, *Inactive*, or *Ready to Test*.

Pending: Price rule is incomplete.

Deployed: Price rule is currently in use for pricing in the pricing system.

Ready to Test: Price rule is complete but can be used by the simulator only, not for pricing calculations.

Inactive: Price rule is no longer active. Use to inactivate a rule that was previously in use.

4. Enter a description for the price rule.

This is a free-form text field.

5. Enter a short description.

A truncated version of the long description appears by default.

6. Select a field name in the Rule Conditions group box.

Choose the transaction field that you want to price by. For example, if you want this rule to apply to every order in a particular business unit, select *Business Unit*.

7. Click the Search button to select values for the field names.

When you click the Search button, the system transfers you to a page from which you can search for and select valid values for the field name that you select. For example, if you selected *Business Unit* as a pricing key field, then you would get a list of business units to choose from. Values that were previously selected for the condition automatically appear as selected. You can restrict the search further by entering additional search data in the fields provided at the top of the page and clicking the Search button. Select one or more values that you want to apply to the rule condition and click OK.

The condition appears in the Rule Definition section. The system displays the rule definition based on the last condition that you built. If you are updating an existing condition, you may need to click the Build Rule Definition button to have the system rebuild the entire price rule condition.

To add a price rule condition in advanced mode:

1. Select advanced mode by clicking the Advanced link on the Conditions page.

2. For a new price rule, select a transaction.

This transaction determines the valid price by field names available for the conditions.

Note. In PeopleSoft CRM installations, the field is read-only and the default is *Order Capture*.

3. Change the status from *Pending* to *Deployed*, *Inactive*, or *Ready to Test*.

Pending: Price rule is incomplete.

Deployed: Price rule is currently in use for pricing in the pricing system.

Ready to Test: Price rule is complete, but is not in use for pricing in the pricing system. It can be used only in the simulator.

Inactive: Price rule is no longer active. Use to inactivate a rule that was previously in use.

4. Enter a description for the price rule.

This is a free-form text field.

5. Enter a short description.

A truncated version of the long description appears by default.

6. Select a field name in the Rule Conditions group box.

You may enter multiple field names by inserting a new row for each new field name.

7. Enter the field name values directly in the Identifier field, or click the Search button.

Enter multiple values by separating the values with commas. Alternatively, you can click the Search button. The system transfers you to a page from which you can search and select valid values for the field name that you selected for the condition. Values that were already selected for the condition automatically appear as selected. You can further restrict the search by entering additional search data in the fields provided on top of the page and clicking the Search button. Select the fields that you want to apply to the rule condition and click OK.

The field name and value conditions defined in the Rule Conditions section appear in the Combined Conditions section. The individual rows in the Combined Conditions section serve as a foundation for you to create more complex conditions.

8. Select the rows in the Combined Conditions section that you want to use to create a more complex condition.
9. Select either the *And* or *Or* operator.
10. Click the Build Rule Definition button to create the advanced price rule.

The system automatically inserts the new condition in the Combined Conditions section. The condition also appears in the Rule Definition section.

You can create more complex conditions by selecting new rows in the Combined Conditions section, selecting an operator, and clicking the Build Rule Definition button until you have created the desired rule definition.

Mode

Use to determine the data entry method:

Basic: Enables you to search for values for the field names that you selected. The Match These Values column is populated with the description of the values that you selected after you made a selection. Rule conditions are automatically joined with the *And* conditional operator.

Advanced: Basic mode plus additional data entry features. Enables you to manually enter values for the identifiers or search for identifiers. If adding them manually, separate the values by commas without a space between values. The Match These Values column is populated with the description of the identifiers that you enter.

The Combined Conditions grid is available and automatically populated with the basic field name and value rule conditions. The Combined Conditions grid enables you to create rule conditions that you can combine into more complex conditions. You can use logical *And* or *Or* operators.

Advanced mode is the default.

Rule Attributes

Transaction

Select a value from the available options to create a new price rule. Select a value to populate the list of values for the field names.

This field is visible only in add mode. Once the rule is created for a transaction, you cannot change the transaction.

Note. In PeopleSoft CRM installations, this field is read-only and the default is *Order Capture*.

Status	<p>Values are:</p> <p><i>Deployed:</i> Activates the price rule so that it is used to determine price adjustments. You must enter data on the Formulas page before you can save the price rule in this status. You can also use the simulator to test price scenarios in this status.</p> <p><i>Inactive:</i> The price rule is no longer active. Use to cancel a rule that was previously in use.</p> <p><i>Pending:</i> This status appears by default. You can save the price rule in this status without adding data on the Formulas page. Use this status when you want to save the price rule but you don't want the system to process any edits on the rule. You cannot use a rule in this status in the simulator.</p> <p><i>Ready to Test:</i> Use this status to test the rule with the simulator. The rule is available to the pricing system.</p>
Description	Use to describe the rule.
Short Description	Use for the short description of a rule. The first 20 characters of the description appear by default. This field is used as the label on pages and inquiries.
Rule Conditions	
Error	If an error exists in the price rule definition, a red square box appears in this column. Correct the error. This field appears only if an error exists.
Field Name	Select the price by field to use with the rule condition. The valid list of price by fields is established on the Transaction Price By Keys page by the PeopleSoft Enterprise Pricer system administrator. The list of fields available when you create the price rule is determined by the transaction.
Identifier	Use to manually enter values for the price by fields. This value is available only if you are using the advanced mode.
Search Icon	Use to search for valid price by field values.

Note. If you selected values previously, those values remain selected until you clear them. You can restrict the search further by entering the appropriate ID and description values at the top of the search page.

Combined Conditions

In the advanced mode, the field names and values that were entered for the rule conditions are included in the Combined Conditions grid when you click the Build Rule Definition button and select an operator. The items in the Combined Conditions grid are a foundation used to build more complex conditions. Select two or more rows to build the complex condition. Every new complex condition that you create is added to the Combined Conditions grid. You can continue to use the new conditions to create more complex conditions for the rule definition.

And/Or

After selecting two or more combined conditions, select either operator to combine the conditions. This option is available if you are using the *Advanced* mode.

Note. In basic mode, the system automatically uses only the *And* operator.

Build Rule Definition

After selecting the conditions to use and the conditional operator, click this button to build the rule definition. The new condition is added to the Combined Conditions grid, and the definition appears in the Rule Definition section.

Rule Definition

Displays the final definition in both advanced and basic modes. When using the basic mode, the system displays the rule definition automatically. Click Save to save the price rule.

Establishing Price Rule Formulas

Access the Formulas page.

See [Chapter 2, “Implementing PeopleSoft Enterprise Pricer,” Configuring Price Transaction Code Options, page 8.](#)

Formulas page

The price action type selected determines what additional data are required on the price formula. The start and end dates and the high and low quantities are required for each formula. The date of the transaction and the quantities of the products on the transaction must fall within these ranges for the system to apply the formula to the transaction.

Rule Attributes

Price Action Type

Defines what the price rule does when applied to a transaction. This field is required.

Values vary for each transaction:

Discount/Surcharge: Apply a discount or surcharge to the line.

Free Period Promotion: Define periods for which a recurring charge is not applied.

Giveaway: Apply a giveaway product that can be based on the line or order.

Min/Max Target Discount (minimum/maximum target discount): Compare the discount adjustment and apply a target discount.

Min/Max Target Price (minimum/maximum target price): Compare the price adjustment and apply a target price.

Min/Max Target Surcharge (minimum/maximum target surcharge): Compare the surcharge adjustment and apply a target surcharge.

Note. Use the target price action types to limit the total adjustments made to the transaction by the pricing engine. For example, if you define a maximum target discount for a product as 25 percent, the system applies discounts to the list price up to 25 percent. If you define a minimum surcharge for a product as 5.00 USD, the system always applies a minimum 5.00 USD surcharge. If you define a minimum target price for a product as 50.00 USD, the system applies adjustments to the base price, but does not discount the price below 50.00 USD.

Price Override: Apply a new price to replace the existing price.

Note. If the price rule is defined only for product ID, we recommend that you use the Price List feature to define the base price for the product.

Product Add: Add a product to the order, such as a cancellation penalty product.

Recurring Discount/Surcharge: Apply a discount or surcharge to the entire order for a specified number of periods.

Total Order Discount/Surcharge: Apply a discount or surcharge to the entire order.

Price Type

Defines which transaction value that the system should use to compare the range of the price rule formula.

Values vary for each transaction and include:

Extended Price

Quantity

Volume: Only applies to weight and volume pricing.

Weight: Only applies to weight and volume pricing.

Note. Weight and volume are not used by PeopleSoft CRM applications.

Cascading/Summed

Determines how the system applies the adjustment for the *Discount/Surcharge* price action type.

Cascading: Applies the adjustment as the discounts are found. A second discount is applied to the previously discounted price, a third discount is applied to a price that was previously discounted twice, and so on. For example, if the system encounters two discounts, 10 percent and 20 percent off

the list price of 100.00 USD, the system applies the discounts in this way: 10 percent off of 100.00 USD and 20 percent off of 90.00 USD. Thus, the unit price for the order schedule line is 72.00 USD.

Summed: When the system finds multiple discounts, it adds them together and applies the discounts once. For the summed example, the system would combine the 10 percent and 20 percent discounts for 30 percent off of 100.00 USD. The resulting unit price for the order schedule line is 70.00 USD.

Promotion Code

Displays promotions from PeopleSoft Promotions Management. If a price rule is generated by PeopleSoft Promotions Management, the promotion code is automatically assigned to the price rule.

Note. Not applicable to PeopleSoft CRM.

Use Grace Days

Select if you want the system to use the grace days assigned to the customer when determining which price formulas are applied to the price. You can define a grace period (in days) for each customer.

Note. This option is not used by PeopleSoft CRM applications.

Merchandising Type

Displays values associated with promotions from PeopleSoft Promotions Management.

Note. Not applicable to PeopleSoft CRM.

Period-to-Date

Used to include period-to-date totals in the adjustment.

Note. This option is not used by PeopleSoft CRM applications.

Stop Processing Here

Prevents the system from applying further price adjustments when the system finds a match with a price rule. This action occurs for total order or line adjustments. The system stops applying price adjustments after encountering the first price rule match that has this option selected.

Note. This option applies only to price adjustments. It does not apply for price lists associated with price rules.

Price Formulas

The fields in this grid vary depending on the price action type and price type.

Unit of Measure

Applies to price rules for product and product group only.

Start Date and End Date

The transaction date must fall within these dates if this rule is to apply.

Note. If using PeopleSoft SCM installations, a field on the General Information - Payment Options page indicates the grace pricing discount days. An entry in this field enables customers to receive discount pricing beyond the end date for the price break.

Low Quantity

Specify the lower limit of the range of quantities to which this rule should apply. This field is based on the price type definition. The system enters the

next lower quantity or amount limit as you insert price formula entries on this page. The quantity appears if you selected the *Quantity* price type, and the amount appears if you entered the *Extended Price* price type.

High Quantity

Specify the upper limit of the range of quantities to which this rule should apply. If you specify an upper limit of *9999999999*, the price formula is applied regardless of the quantity entered on the transaction. For example, if you enter a price formula with a quantity range of 1–200 and don't create any other price formulas, the system does not apply a price formula to an order with a quantity of 201 unless an upper limit was entered. The system uses *9999999999* as the default in the High Quantity field for the last price formula if the field is left blank.

Percent or Amount Type

Make adjustments by percentage or a fixed amount. Values are: *Amount* or *Percent*.

Adjustment Amount

Enter the adjustment amount if you selected *Amount* in the Percent or Amount Type field.

Adjustment Percent

Enter the adjustment percentage if you selected *Percent* in the Percent or Amount Type field.

Price

Enter the new price, if the price action type is *Price Override*.

Currency

Specify the currency shown in the Amount Type field and the currency for price overrides.

Charge Type

Select from the available options for price action types: *Discount/Surcharge* and *Total Discount/Surcharge*.

Discount: Reduces the list price of the product or the entire order in the case of a total order discount.

Surcharge: Increases the price of the product or the entire order in the case of a total order surcharge.

Important! Discounts are always negative numbers and surcharges are always positive numbers. If you select *Discount* but enter a positive number, the system changes the number to a negative number.

Minimum Amount and Maximum Amount

Enter both of these values if you selected *Amount* in the Percent or Amount Type field. This field applies to the following price action types: *Min/Max Target Discount* and *Min/Max Target Surcharge*.

Minimum Percent and Maximum Percent

Enter both of these values if you selected *Percent* in the Percent or Amount Type field. This field applies to the following price action types: *Min/Max Target Discount* and *Min/Max Target Surcharge*.

Minimum Price and Maximum Price

Enter both of these values if you selected *Min/Max Target Price* in the Price Action Type field.

Formula Detail Tab

Select the Formula Detail tab.

The Formula Detail tab is used if the Price Action Type field specifies *Giveaway* or *Product Add*.

UOM Promo (unit of measure promotion)

Select the UOM for the product that is given away or added to the order.

Giveaway Type

Applies to only giveaways. Specify whether the giveaway is applied to each line of the transaction (sales order) or applied only once to the header of the transaction.

Per Line: The system applies this giveaway to every line.

Per Order: The system applies this giveaway only once to the entire sales order.

Terms and Adjustment Type Tab

Select the Terms and Adjustments Type tab.

Terms

Assign a payment term to the formula. If this formula is used when pricing the transaction, the system assigns the most favorable payment terms to the transaction.

Important! If you set up a price rule with payment terms as a key and you have a price formula with payment terms, you may not get the intended price adjustment when repricing the order.

Note. This option is not used in PeopleSoft CRM.

Adjustment Type

Values are:

Bill Back: An adjustment that accrues rather than an adjustment that reduces the net unit price of the item on the invoice.

Note. This option does not appear in PeopleSoft CRM. PeopleSoft CRM uses off-invoice adjustments.

Off-Invoice: An adjustment that reduces the net unit price or, in the case of a total order adjustment, the price of the order.

Account Distribution Codes

Select general ledger distribution accounts for the price rule formulas if they are applied to the transaction.

Note. This option is not used by PeopleSoft CRM.

Discount Dist Code and Surcharge Dist Code (discount distribution code and surcharge distribution code)

These distribution codes, along with the associated amounts, are passed to the PeopleSoft Billing Interface tables during the Populate Billing process.

To use a bill back adjustment, enter both a discount and surcharge code. Off-invoice discounts or surcharges require only one of these codes.

Discount Dist Percentage and Surcharge Dist Percentage (discount distribution percentage and surcharge distribution percentage)

The sum of the percentages must equal 100 percent.

CHAPTER 5

Using the Arbitration Plan

This chapter provides an overview of arbitration plans and discusses how to set up an arbitration plan.

Understanding Arbitration Plans

The arbitration plan is the arbiter when multiple price rules match the transaction. It decides the order in which the price rules are applied to the transaction base price. For price rules that match on the same criteria, you can define the arbitration plan to break those ties and tell the system which rule to apply first. You can also use the arbitration plan to filter the price rules that can be applied to the transaction. The definition of the arbitration plan nodes and the placement of the decision nodes determine the filtering power of the arbitration plan. To verify that the arbitration plan is performing as you expect, we recommend that you use the pricing simulator to test the arbitration plan and price rules. Placement of certain price action types in the arbitration tree will not affect the order in which the adjustment is applied to the transaction, but it may affect the Stop Processing Here option defined on the price rule. These price action types are:

- Summed

Adjustments are always summed and applied after all other adjustments are made.

- Total Order Discounts/Surcharges

Adjustments are always summed and applied to the total order value after all other line level adjustments are made.

- Giveaways

Adjustments are always applied after all other adjustments are made.

A basic arbitration plan can specify sort order for price rules with conditions that match the transaction. This example shows an Arbitration Plan using a Highest Discount First decision:

Arbitration Plan

Arbitration Plan	Transaction	Description	SetID
DEFAULT	OC	Order Capture	IPROD

*Description: Default

Arbitration Tree



 **Highest Discount First**

Selection Detail

Arbitration Type:

Decision:

Example of Arbitration Plan page using a Highest Discount First decision

If you are certain that price rules are defined for only discounts (no price overrides or giveaways), you can define the arbitration plan simply. If you use any of the other price action types, inconsistent pricing for this plan results. The pricing engine uses a decision point, that is, highest discount first, that is defined at the highest level in the arbitration tree to apply all matching price rules. You should refine the plan based on use of the pricing features.

In the following example, the system would select all price rules with conditions matching the transaction and sort them first by surcharges and then by discounts. If multiple surcharges exist, the lowest surcharge is applied first. After all the surcharges are applied, discounts are applied (highest discount first).

This example shows an Arbitration Plan using surcharges and discounts:

Arbitration Plan

Arbitration Plan	Transaction	Description	SetID
NEXT	OC	Order Capture	CRM02

*Description: Default

Arbitration Tree

- Surcharge
 - Lowest Surcharge First
- Discount
 - Highest Discount First

Selection Detail

Arbitration Type:

Decision:

Example of Arbitration Plan page using surcharges and discount

You can use the arbitration plan as a filter to apply certain price rules to a transaction and not others. Although some price rules might match the transaction according to the conditions of the price rule, you can define the arbitration plan to bypass some price rules. The previous example is also a filter because it applies only surcharges and discounts to the transaction. If giveaway or price override price rules that match the transaction are defined, they are not applied when using this arbitration plan.

This example continues the previous example and shows an Arbitration Plan applying giveaway and price override price rules:

Arbitration Plan

Arbitration Plan	Transaction	Description	SetID
NEXT	OC	Order Capture	CRM02

*Description: Default

Arbitration Tree

- Price Override
 - Lowest Price Override First
- Surcharge
 - Lowest Surcharge First
- Discount
 - Highest Discount First
- Giveaway

Selection Detail

Arbitration Type:

Price Action Type:

Example of Arbitration Plan page using giveaways and price overrides

Any arbitration plan that does not have a decision point at the top level of the tree is a filter. Where you place the decision node in the tree is where you tell the pricing engine that you don't care to further differentiate the price rules—that you want the pricing engine to apply whatever rules match the transaction at that point in the order of the decision.

For example, you want to define an arbitration plan that selects only discount price rules that match certain fields on the transaction. In this case, you define the order in which those matching price rules are applied to the transaction. In this example, let's say you want to match price rules defined only by sold to customer, product, and region code. Once the system finds the matching price rules, first apply those rules that match all three criteria, then apply the rules that match only the product, and then apply any discounts defined for our favorite customers.

This example shows an Arbitration Plan using a filter:

Arbitration Plan	Transaction	Description	SetID
NEXT	OC	Order Capture	CRM02

*Description: Default

Arbitration Tree

- Sold-to, Product, Region
 - Ship To Customer
 - Product ID
 - Region ID

Selection Detail

Arbitration Type: Pricing Key

Description: Sold-to, Product, Region

Pricing Keys

- Ship To Customer
- Product ID
- Region ID

Update Tree

Example of Arbitration Plan page using a filter

This arbitration plan considers only discount price rules that are defined by sold to customer, region; product; or sold to customer only. It applies the formulas for those price rules in that order. If there is a tie within a node (that is, there are two price rules defined for the product ID), the system sorts those two rules and applies the highest discount first.

In the event where two rules match the same node in the tree, the system finds the next node that can be used for each rule until a different node is used by each rule or a decision point is reached. When searching for the node, if the rule does not match a top-level node, it skips any child node and evaluates the next node, which is at the same level or a level higher as the node that is evaluated last. If the rule does not match any node in the tree and there is no final decision point defined at the top level of the tree, the rule is ignored. Every node that is used to break a tie ends in a decision

You can create price rules without an arbitration plan, but the system does not apply the price rules unless you create an arbitration plan.

Note. The options that are available in the arbitration plan are established by each transaction.

Setting Up an Arbitration Plan

To set up an arbitration plan, use the Arbitration Plan (EOEP_ARB_PLAN) component.

This section discusses how to set up an arbitration plan.

Page Used to Set Up an Arbitration Plan

Page Name	Object Name	Navigation	Usage
Arbitration Plan	EOEP_ARB_PLAN	Pricing Configuration, Arbitration Plan	Define how price rules apply to the base or list price when pricing a transaction.

Setting Up an Arbitration Plan

Access the Arbitration Plan page.

The screenshot displays the 'Arbitration Plan' configuration interface. At the top, there is a table with the following data:

Arbitration Plan	Transaction	Description	SetID
DEFAULT	OC	Order Capture	SHARE

Below the table, there is a field for '*Description:' with the value 'Default' and a checked 'Default' checkbox. The main area is titled 'Arbitration Tree' and contains a tree view of pricing rules. The tree structure is as follows:

- Default Pricing Arbitration
 - Product Add
 - Rule Name in Descending Order
 - Free Period Promotion
 - Rule Name in Descending Order
 - Price Override
 - Highest Price Override First
 - Cascading
 - Discount
 - Quantity
 - Extended Price
 - Highest Discount First
 - Surcharge
 - Quantity
 - Extended Price
 - Lowest Surcharge First
 - Summed
 - Discount
 - Surcharge

To the right of the tree is the 'Selection Detail' panel, which includes:

- Arbitration Type: Action Type (dropdown)
- Price Action Type: Giveaway (dropdown)
- Update Tree (button)

Arbitration Plan page

Transaction

Arbitration plans are defined by pricing transaction. The system uses this field to verify and limit the price by keys. In add mode, values are:

Buying Agreement: Used with PeopleSoft Order Management.

Sales Order Batch: Used with PeopleSoft Order Management.

Order Capture: Used with PeopleSoft Order Capture.

Note. In PeopleSoft Customer Relationship Management (PeopleSoft CRM), the order capture transaction appears by default, and you cannot select another value.

Sales Order: Used with PeopleSoft Order Management.

Note. In PeopleSoft Order Management, the system assigns the arbitration plan ID to the sold to customer and customer group. The arbitration plan ID appears by default on the sales order in the following order: sold to customer, customer group, and default defined for the transaction.

Price Date

Select the transaction date that you want the system to match against the start and end dates defined on the Price Formulas page. This date is used for the start date of individual products on the price list.

This field is available if price dates are selected during implementation on the Price Transaction Code page.

Note. PeopleSoft CRM always uses the order date as the default transaction date. The Price Date field is not available for the order capture transaction.

Values are:

Order Date: The date that the order header is created. The system uses the current date as the default date on a sales order header, but you can enter another date.

Requested Arrival Date: The date that the customer wants the order to arrive on site. This value is used by PeopleSoft Supply Chain Management (PeopleSoft SCM) installations only.

Schedule Ship Date: The date that the order line is scheduled to ship. The system calculates this date from the requested arrival date, using the transit lead time and exception ship dates, but you can enter another date. This value is used only by PeopleSoft SCM installations.

Default

Select to establish the default arbitration plan. The system uses the default arbitration plan when a customer doesn't have another associated arbitration plan or doesn't belong to a customer group that has an associated arbitration plan. You must have one default arbitration plan for each transaction.

Note. Customers are associated with customer groups in the Customer Group Link page. Both customers and customer groups can be linked to arbitration plans through price rules.

Arbitration Tree

Use the buttons on the toolbar to edit and navigate the arbitration tree.

Note. You can copy, cut, and paste between different arbitration plans or from an existing arbitration plan to a new one using the buttons on the toolbar.

Add Sibling	Click this button to add a new node to the same level as the selected node.
Add Child	Click this button to add a new node under the selected node.
Copy	Click this button to copy the selected node to the clipboard so you can paste them somewhere else.
Copy Branch	Click this button to copy the selected node and any nodes under it.
Cut	Click this button to remove the selected branch from the tree. The nodes are copied to the clipboard so that you can paste them elsewhere.
Delete	Click this button to remove the branch from the tree. The nodes are not copied to the clipboard.
Paste as Sibling	Click this button to paste the nodes from the clipboard. The nodes are inserted at the same level as the selected node.
Paste as Child	Click this button to paste the nodes from the clipboard. The nodes are inserted as a child of the selected node.
Move Up	Click this button to move the selected node up one level.
Move Down	Click this button to move the selected node down one level.
Selection Detail	
Arbitration Type	<p>Select from the following options to add nodes to the arbitration tree to instruct the system how to apply the price rules. Values are:</p> <p><i>Action Type:</i> Select corresponding values from the Price Action Type field:</p> <ul style="list-style-type: none"> • <i>Discount.</i> • <i>Giveaway.</i> • <i>Price Override.</i> • <i>Surcharge.</i> • <i>Total Order Discount.</i> • <i>Total Order Surcharge.</i> • <i>Free Period Promotion.</i> • <i>Product Add.</i> <p>This list of values is determined during implementation on the Price Transaction Code page:</p> <p><i>Cascading/Summed:</i> Select either value from the Cascaded/Summed field.</p> <ul style="list-style-type: none"> • <i>Rule Name in Ascending Order.</i> • <i>Highest Discount First.</i> • <i>Highest Surcharge First.</i>

- *Rule Name in Descending Order.*
- *Lowest Discount First.*
- *Lowest Surcharge First.*
- *Highest Price Override First.*
- *Lowest Price Override First.*

Price Rule: Enter a description and select a price rule. This value replaces the Exclusive Pricing feature in previous releases.

Price Type: Select corresponding values from the Price Action Typefield. Values include:

- *Extended Price.*
- *Quantity.*
- *Volume.*
- *Weight.*

Note. PeopleSoft CRM uses extended price and quantity only.

Pricing Keys: Enter a description and select a pricing key. The list of values is based on the pricing keys established for the transaction type. You can define a node similar to the price rule sequence used in previous releases.

Folder: Select a folder in the node and enter a description to rename a folder in the node. You can group nodes of a tree and name them. The name is used for information purposes only.

Update Tree

Click this button to apply the selections to the arbitration tree.

CHAPTER 6

Working with the Pricing Simulator

This chapter provides an overview of the pricing simulator and discusses how to run the pricing simulator.

Understanding the Pricing Simulator

The pricing simulator enables you to test the pricing information that you set up. Use it to view the outcome of pricing under different scenarios or use it to test specific pricing criteria with a particular customer. You can adjust the price rules, price lists, and arbitration plan until you receive the desired pricing adjustments.

Running the Pricing Simulator

This section discusses how to:

- Run the pricing simulator.
- Update line level pricing keys in the simulation.

Pages Used to Run the Pricing Simulator

Page Name	Object Name	Navigation	Usage
Simulator	EOEP_TEST	Pricing Configuration, Simulator	Test the pricing information set up with PeopleSoft Enterprise Pricer and select values for the transaction price by keys used in the pricing simulation.
Pricing Keys	EOEP_TEST_LN_KEY	Click the Pricing Keys button on the Simulator page.	Select and view the line level pricing keys used in the pricing simulation.
Header Adjustments	EOEP_TEST_HD_ADJST	Click the Adjustments button on the Simulator page.	View the details of the adjustments that apply to the header. The fields on this page are the same as those that you set up on the Price Rule and Price Arbitration page.
Line Adjustments	EOEP_TEST_LN_ADJST	Click the Adjustments button on the Simulator page.	View the details of the adjustments that apply to the line. The fields on this page are the same as those that you set up on the Price Rule and Price Arbitration page.

Running the Pricing Simulator

Access the Simulator page.

The screenshot shows the Pricing Simulator interface. At the top, there's a 'Simulator' header. Below it, a table shows Transaction (OC), Description (Order Capture), and Price Test ID (HTECH 1). A description field contains 'Hi-Tech Sim 1'. The 'Header Information' section includes fields for Currency Code (USD), Base Currency (USD), Order Date (10/07/2002), and Arbitration Plan (DEFAULT). A 'Pricing Keys' table lists key field codes and values: Sold To Customer (CIHT0001), Offer ID (HCO00101), and Business Unit (HT001). The 'Line Information' section features a table with columns for Product ID, UOM, Qty, List Price, Net Unit Price, Recurring Price, Frequency, Free Periods, and Price Protected. It lists three lines: 1 (HTB3300, EA, 7.0000), 2 (HTS9800, EA, 1.0000), and 3 (HT8200, EA, 1.0000). Below the table are 'Transaction Total' and 'Statistics' sections. A 'Calculate' button is at the bottom left.

Simulator page

Note. You update the pricing keys in the simulator in two places. Update the header level pricing keys on the main page of the simulator and the line level pricing keys on the Pricing Keys page.

Description Enter descriptive text for the simulation. You can save a simulation for later use.

Header Information

Select information to simulate the transaction header and lines.

Currency Code Enter the currency code of the simulated transaction.

Base Currency Enter the base currency of the business unit for the simulated transaction.

Order Date Use to determine applicable price formulas. The current date appears by default.

Arbitration Plan The list of available options is based on the transaction that you selected. If you don't select an arbitration plan, the default is used.

Pricing Keys

The data in this section represents the transaction header and line information.

Key field code	Represents the transaction field used to match to the price rules. The available values are based on the pricing keys established for the transaction.
Value	Represents the transaction value of the key field code. The available values are based on the selection in the Key field code field.

Line Information

Select the Line Info tab.

Select product, unit of measure, and quantity to simulate the transaction line detail.

List Price	Displays the list or base price for the product.
Net Unit Price	Displays the price after the adjustments are applied.
Recurring Price and Frequency	These fields retrieve their values from the list price applied to the line. They appear only if you are using PeopleSoft Order Capture.
Free Periods	Indicates any applicable free period promotion.
Protected	Select if the product is price protected on the applied price list.
Pricing Keys	Click this button to edit or view the pricing keys for additional line level transaction information (in addition to the pricing keys on the Simulator page). The available values are based on the pricing keys established for the transaction.
Adjustments	Click this button to view the line level price adjustments for the simulation. The button is visible only if header or line adjustments exist that match the criteria of the price simulation.
Details Tab	Use to view price list and payment terms information.
Price List Origin	Displays the origin of the list price. Values are: <i>Price List</i> : The price is retrieved from a price list. The price list ID appears next to the Price List Origin field. <i>Price List (base)</i> : The price is retrieved in the base currency from a price list. The price list ID appears next to the Price List Origin field.
	<hr/> Note. This value is used in PeopleSoft CRM only. <hr/>
	<i>Product Price</i> : The price is retrieved from the Product Price definition. <i>Product Price (base)</i> : The list price is retrieved in the base currency from the Product Price definition.
Price List ID	Displays the ID for the price list from which the list price was retrieved.
Payment Terms	Displays the terms retrieved from the price rule that match the simulation.
	<hr/> Note. This option is used in PeopleSoft SCM installations only. <hr/>

Order Level Adjustments

Displays the adjustments that apply to the entire order.

Statistics

Displays statistical results of the simulation.

Calculate

Calculate Click to calculate or recalculate the price simulation and view the price adjustments.

Updating Line Level Pricing Keys in the Simulation

Access the Pricing Keys page.

Line Information

Represents the transaction line level information.

Pricing Keys

Key field code Displays values based on the pricing keys established for the transaction. You can select different value to create different pricing simulations.

Value Displays values based on the selection in the Key field code field. After updating the field, click the Calculate button on the Simulator page to view the results.

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.

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