
PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook

August 2006

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook
SKU CRM9BOM-B 0806
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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.

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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 Customer Relationship Management Business Object Management Preface

This preface discusses:

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

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

Additional Resources

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

Resource	Navigation
Application maintenance information	Patches + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Data models	Support, Documentation, Data Models
Enterprise Integration Point (EIP) catalog	Support, Documentation, Enterprise Integration Point (EIP) Catalog
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes

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

PeopleSoft Enterprise CRM Application Fundamentals

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

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

- CRM Multi-Product Foundation.

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

- Workforce Management.

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

- Interactions and 360-Degree Views.

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

- Self-Service for Customers.

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

- Relationship Management.

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

- Entitlement Management.

This part discusses setting up agreements and warranties.

- SmartViews.

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

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook

PeopleSoft Enterprise CRM Product and Item Management

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

See Also

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook

PeopleSoft Enterprise CRM Enterprise Automation and Configuration Tools

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

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

- Correspondence Management.

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

- Automation Tools.

This part discusses PeopleSoft Enterprise CRM workflow, the Active Analytics Framework (OAF), 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.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook

PeopleSoft Enterprise CRM Services Foundation

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

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

- Entitlement Management.

Entitlement management enables users to manage agreements and warranties.

- Solution Management.

Solution management enables users to establish a set of predefined solutions that can be used by call center agents and field service technicians to resolve customer problems.

- Time Management.

Time management enables users to log time for the work performed on service order lines and cases.

- Environmental Systems Research Institute (ESRI) integration.

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

See Also

PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook

Enterprise PeopleTools PeopleBooks

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

PART 1

Getting Started

Chapter 1

Getting Started with CRM Business Object Management

CHAPTER 1

Getting Started with CRM Business Object Management

This chapter provides an overview of business object management in PeopleSoft Enterprise Customer Relationship Management (CRM) and discusses:

- CRM cross-product business processes.
- CRM cross-product integrations.
- CRM cross-product implementation.

CRM Business Object Management Overview

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

CRM provides:

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

CRM Business Object Integrations

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

- Integration with PeopleSoft Human Resources Management or other similar systems enables you to synchronize CRM employee records with the system of record for human resources data.
- Integration with PeopleSoft Supply Chain Management (SCM) or other similar systems enables you to synchronize customer data that is required for applications within CRM such as Sales, Field Service, and Order Capture.
- Integration with SCM and Financial Management Solutions enables billing information and payment information that is associated with customers to appear in the PeopleSoft Enterprise CRM 360-Degree View.

- The Credit Card EIP (enterprise integration point) enables you to integrate with third-party credit card authorization and payment vendors in Support and the collaborative selling applications.

Refer to the implementation chapters in this PeopleBook for detailed information. You can find supplemental information about third-party application integrations on the Customer Connection website.

CRM Business Object Implementation

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

- A list of components that you must set up.

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

- Links to the corresponding PeopleBook documentation.

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

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Getting Started with PeopleSoft Enterprise Customer Relationship Management 9 Applications”.

Other Sources of Information

In the planning phase of implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface of the *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, with information about where to find the most current version of each.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Component Interfaces

PeopleSoft Enterprise Setup Manager for Customer Relationship Management 9 PeopleBook

PART 2

Business Object Management Basics

Chapter 2

Understanding Business Object Relationship Model Components

Chapter 3

Defining Control Values for Business Objects

Chapter 4

Defining Name and Address Information for Business Objects

Chapter 5

Defining Purchasing Options for Companies, Consumers, and Sites

Chapter 6

Defining Tax Exempt Certificate Information for Companies, Consumers and Sites

Chapter 7

Working with Business Object Profiles

Chapter 8

Working with the Relationship Viewer

CHAPTER 2

Understanding Business Object Relationship Model Components

This chapter discusses:

- BORM (business object relationship modeling) architecture.
- Address books for business objects.
- Business object searches.
- Basic data tables.
- Business object profiles.

Note. Select the Library tab on the PeopleSoft Customer Connection website to view a detailed data model diagram of the business object relationship model.

Business Object Relationship Modelling

This section discusses:

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

BORM Architecture

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

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

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

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

Business Object Components

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

- Company
- Partner Company
- Site
- Person
- Worker

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

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

See Also

[Chapter 9, “Defining Company Business Objects,” page 115](#)

[Chapter 11, “Defining Person Business Objects,” page 139](#)

[Chapter 10, “Defining Site Business Objects,” page 129](#)

[Chapter 16, “Defining Ad Hoc Business Objects,” page 295](#)

[Chapter 12, “Defining Workers,” page 157](#)

Roles

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

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

See Also

[Chapter 3, “Defining Control Values for Business Objects,” Defining Role Types and Role Categories, page 22](#)

[Chapter 8, “Working with the Relationship Viewer,” page 101](#)

Relationships

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

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

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

See Also

[Chapter 3, “Defining Control Values for Business Objects,” Defining Relationship Types and Relationship Categories, page 27](#)

[Chapter 8, “Working with the Relationship Viewer,” page 101](#)

Customers and Business Contacts

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

See [Chapter 5, “Defining Purchasing Options for Companies, Consumers, and Sites,” page 69](#).

Key Performance Indicators

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

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

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

See Also

[Chapter 4, “Defining Name and Address Information for Business Objects,” Defining Customer Contacts, page 60](#)

[Chapter 10, “Defining Site Business Objects,” page 129](#)

[Chapter 4, “Defining Name and Address Information for Business Objects,” page 47](#)

[Chapter 4, “Defining Name and Address Information for Business Objects,” Defining Customer Contacts, page 60](#)

[Chapter 17, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” Mapping Message Data to PeopleSoft Enterprise CRM Records and Fields, page 324](#)

[Chapter 17, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” Understanding Enterprise Integration Technology, page 299](#)

PeopleSoft Enterprise Components for CRM 9 PeopleBook

PeopleSoft Enterprise Scorecard 9 PeopleBook

Contact Information for Business Objects

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

When you implement the Customer Relationship Management system, you designate how many contact info entries are available for each organization and individual business object type. At run time, users of the system can select which entry is the primary contact information for the business object and can update the contact methods that is associated with each entry. The primary information appears on component pages.

See Also

[Chapter 4, “Defining Name and Address Information for Business Objects,” page 47](#)

[Chapter 10, “Defining Site Business Objects,” page 129](#)

[Chapter 11, “Defining Person Business Objects,” page 139](#)

Business Object Searches

Business object searches:

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

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

See Also

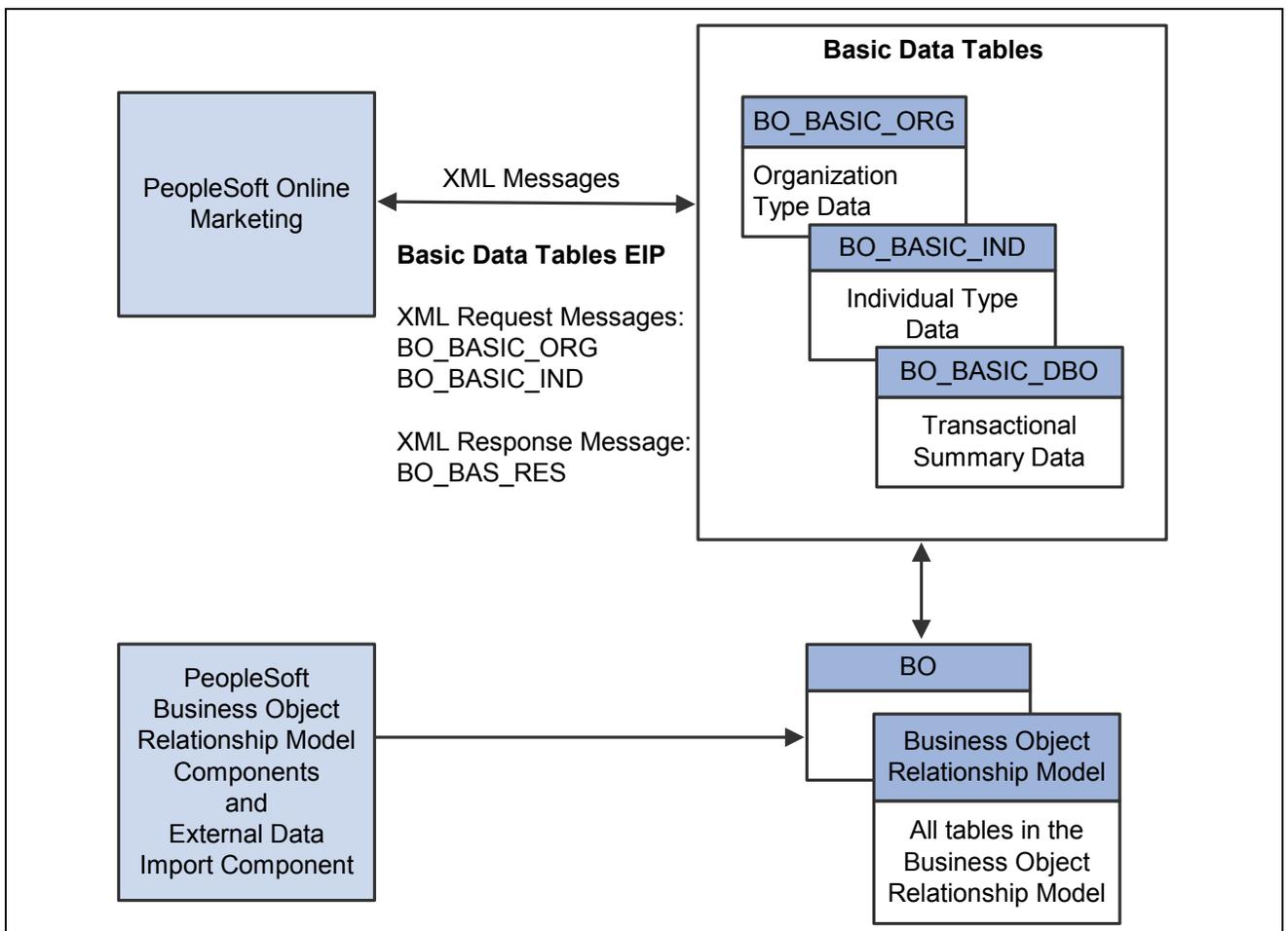
Chapter 13, “Working with Predefined Business Object Search and Quick Create Data,” page 183

Basic Data Tables

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

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

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



Basic Data Tables

When you create a business object and save it in the BORM, a subset of this information is passed to the basic data tables. If the Customer Data Hub and Data Quality Management products are installed and a customer is inactivated in the BORM as the result of a merge, the record for the inactivated customer is removed from the basic data tables.

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

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

See Also

[Chapter 18, “Importing Data Into PeopleSoft Enterprise CRM,” page 329](#)

PeopleSoft Enterprise Online Marketing 9 PeopleBook

Business Object Profiles

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

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

See Also

[Chapter 7, “Working with Business Object Profiles,” page 81](#)

CHAPTER 3

Defining Control Values for Business Objects

This chapter provides an overview of business object controls and discusses how to:

- Define business object and name types.
- Define role types and role categories.
- Define relationship types and relationship categories.
- Configure address books.
- Set up contact methods.
- Define component transfer navigation.
- Define segment codes.
- Define industries.
- Define national ID types.
- Define customer groups.
- Define customer data management system options.
- Define basic data mappings.

Understanding Business Object Controls

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

This section discusses:

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

Business Object Types

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

The PeopleSoft system delivers these predefined business object types:

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

See [Chapter 3, “Defining Control Values for Business Objects,” Modifying and Adding Business Object Types, page 22.](#)

Role Types and Role Categories

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

Individual Role Types

PeopleSoft CRM delivers these role types for individual business objects:

- Person
This role indicates a person with an undefined role. This role is automatically assigned when you create consumers, contacts, and workers by using the Person component.
- Worker
This role indicates a person who performs work for your company, either as an employee or as a contractor. This role is automatically assigned when you define a worker by using the Worker component.
- Broker
This role indicates a person who acts on behalf of multiple customers. You manually assign this role to a contact business object by using the Role page of the ad hoc Business Object component.
- Contact
This role indicates a person who acts on behalf of a customer or a partner company. This role is automatically assigned when you designate that a person is a contact of a customer or a partner company.
- Individual Consumer
This role indicates a person who purchases, leases, or contracts for your products or services. This role is automatically assigned when you define a consumer by using the Person (Individual Consumer) component.
- Account Contact
This role indicates a person who participates as a member of an account team that is assigned to manage a corporate account. This role is automatically assigned when you define a worker as a member of an account team on the Accounts page of the Company, Site, or Person (Individual Consumer) components.
- Internal Contact

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

- External Contact

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

- Business Contact (IND)

This role indicates that the individual is a customer.

- Ship To Individual

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

- Sold To Individual

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

- Bill To Individual

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

- Individual Prospect

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

- Sales User

This role type is assigned to sales users.

See *PeopleSoft Enterprise Sales 9 PeopleBook*, “Setting Up Sales Security and Personalization,” Setting Up Sales Users.

Organization Role Types

PeopleSoft CRM delivers these role types for organization business objects:

- Company

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

- Site

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

- Competitor

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

- Partner

This role indicates a company that cooperates with your company in a joint venture.

- Primary Owner - Company

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

- Corporate Hierarchy

This role represents a corporate hierarchy.

- Business Contact (ORG)

This role indicates that the organization is a customer.

- Ship To Organization

This role indicates that the customer can receive shipments.

- Sold To Organization

This role indicates that the customer can make purchases.

- Bill To Organization

This role indicates that the customer can receive bills.

- Organizational Prospect

This role indicates that the individual is an organizational prospect.

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

See Also

[Chapter 3, “Defining Control Values for Business Objects,” Defining Role Types and Role Categories, page 22](#)

Relationship Types and Relationship Categories

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

- Company ⇔ Site

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

- Site ⇔ Site

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

- Primary Contact ⇔ Company

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

- Contact ⇔ Company

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

- Primary Contact ⇔ Site

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

- Contact ↔ Site

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

- Primary Contact ↔ Consumer

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

- Contact ↔ Consumer

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

- Primary Contact ↔ Person

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

- Contact ↔ Person

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

- Consumer ↔ Site

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

- Parent Company ↔ Company

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

- Primary Contact ↔ Competitor

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

- Contact ↔ Competitor

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

- Acct Owner ↔ Company

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

- Acct Team Member ↔ Company

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

- Contact ↔ Partner

This type indicates a relationship between the contact and partner role types and signals that the person with the contact role is a contact for the partner. The system automatically establishes the relationship when you associate a contact with a partner.

- Primary Contact ↔ Partner

This type indicates a relationship between the contact and partner role types and signals that the person with the contact role is a primary contact for the partner. The system automatically establishes the relationship when you designate a contact as the primary contact for a partner.

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

See Also

[Chapter 3, “Defining Control Values for Business Objects,” Defining Relationship Types and Relationship Categories, page 27](#)

Contact Information Entries

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

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

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

See Also

[Chapter 2, “Understanding Business Object Relationship Model Components,” Contact Information for Business Objects, page 10](#)

[Chapter 4, “Defining Name and Address Information for Business Objects,” Accessing Contact Information, page 55](#)

Contact Method Types and Contact Method Purpose Types

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

Contact Method Types

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

PeopleSoft CRM provides these predefined contact method types:

- Address
- Phone
- Email

Contact Method Purpose Types

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

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

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

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

- Business
- Cellular
- Default
- FAX
- Home
- Telex
- Pager
- Campus
- Dormitory

- Main
- Other
- Home Fax
- Other Fax
- Assistant
- Callback
- Car
- SDN
- Radio
- TTY/TDD
- Company

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

- Business
- Campus
- Dorm
- Home
- Other

See Also

[Chapter 3, “Defining Control Values for Business Objects,” Setting Up Contact Methods, page 31](#)

Component Transfer Navigation

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

These predefined component navigation definitions are available:

Component Navigation Definition	Description
Account Representative (ACCTREP)	Enables transfers to the Accounts page of the Company component.
Business Contact (BC)	Not implemented for this release.
Business Object (BO)	Enables transfers to the Business Object page of the ad hoc Business Object component.

Component Navigation Definition	Description
Company (COMPANY)	Enables transfers to the Company page of the Company component.
Individual Consumer (CONSUMER)	Enables transfers to the Consumer page of the Person (Individual Consumer) component.
Partner (PARTNER)	Enables transfers to the Consumer page of the Person (Individual Consumer) component.
Person (PERSON)	Enables transfers to the Contact page of the Person (Business Contact) component.
Site (SITE)	Enables transfers to the Site page of the Site component.
Worker (WORKER)	Enables transfers to the Worker page of the Worker component.

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

Defining Business Object and Name Types

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

This section discusses how to:

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

Pages Used to Define Business Object and Name Types

Page Name	Object Name	Navigation	Usage
Business Object Type	BO_TYPE	Set Up CRM, Common Definitions, Customer, Business Object Type, Business Object Type	Modify and add business object types.
Business Object Name Type	BO_NAME_TYPE	Set Up CRM, Common Definitions, Customer, Business Object Name Type, Business Object Name Type	Define name types for the selected business object type. When you define names for a business object, you must specify a type for each name.

Modifying and Adding Business Object Types

Access the Business Object Type page.

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

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

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

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

Defining Name Types for Business Objects

Access the Business Object Name Type page.

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

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

See Also

[Chapter 4, “Defining Name and Address Information for Business Objects,” page 47](#)

Defining Role Types and Role Categories

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

This section discusses how to:

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

Pages Used to Define Role Types and Categories

Page Name	Object Name	Navigation	Usage
Role Type	BO_ROLE_TYPE	Set Up CRM, Common Definitions, Customer, Role Type, Role Type	Modify and add role types.
Role Category	BO_SRCH_GROUP	Set Up CRM, Common Definitions, Customer, Role Category, Role Category	Modify and add role categories. Generally, role categories serve a specific processing purpose, such as a business object directory search process.

Modifying and Adding Role Types

Access the Role Type page.

Role Type Default Views

Role Type

Role Type Definition

Role Type ID 2

***Description** Company

Short Description Company

***Business Object Type** Organization

Transaction ID Company

Enabled Role Icon PS_COMPANY_ICN

Disabled Role Icon

***Cascade Option** Do not cascade

Publish EIP

Join Indicator

Participant Indicator

Capture Contact Methods

Enabled for Basic Data

Enabled for Quick Create

SetID is Required

Application Class ID Company [Package Tree Viewer](#)

Application Class Path RB_CDM:ORGANIZATION:COMPANY

Secure Record Name BC

Status Record Name BC

Status Field Name CUST_STATUS

Customize | Find | First 1-2 of 2 Last

*Role	Quick Create Template		
1 Site	The Company with Site (BC)		
2 Contact	CDM Company with Contac		

Role Type page

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

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

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

Transaction ID Select the component transfer navigation definition that is associated with the role type.

Enabled Role Icon and Disabled Role Icon	Select an image to visually indicate the role status in various parts of the PeopleSoft CRM system, such as in the Relationship Viewer and Customer Data Management components.
Cascade Option	Select <i>Cascade</i> to automatically update addresses for all related business objects whenever you update an address for a business object. For example, when a company changes its address, the system automatically updates the addresses for all company contacts that have the same address. <hr/> Warning! Selecting this option triggers multiple database operations when you update contact methods, which can severely degrade system performance. It is recommended that you enable this option only before a primary address change and disable it immediately afterward. <hr/>
Publish EIP (publish enterprise integration points)	Select to include the role data when publishing a Customer Data Management (CDM) application message. If a business object has several roles, you can use this option to limit the roles for which data is published.
Join Indicator	Select to indicate a role that is assigned to business objects and exist primarily for group participant business objects. For example, you might create a household business object to group the people who live at a specific address.
Participant Indicator	Select to indicate a role that is assigned to business objects that participate in relationships with a business object that has a joining role. For example, you might create a household member role to assign to the people who live at a specific address.
Capture Contact Methods Enabled for Basic Data	Select to indicate that you want to capture contact methods for this role type. Select to automatically run the Enterprise PeopleTools BO_BAS_LOAD Application Engine process to update the basic data tables (BO_BASIC_ORG and BO_BASIC_IND) whenever you update data that pertains to this role. Basic data integrates with PeopleSoft Enterprise Marketing and PeopleSoft Enterprise Online Marketing and is used by mobile applications. If you do not select this option, you must run the application engine process manually. <u>See Chapter 2, “Understanding Business Object Relationship Model Components,” Basic Data Tables, page 11.</u>
Enabled for Quick Create	Select to enable the quick create function to use this role. <hr/> Note. This option is disabled for the partner role. <hr/>
SetID Required	Select to require the entry of a setID when creating a business object with this role by using the quick create function. <u>See Chapter 14, “Using Business Object Search and Quick Create Functionality,” page 263.</u>
Application Class ID and Application Class Path	Select the ID and path for the application class that encapsulates the business logic of the role that is denoted by this role type. For example, the contact role is supported by the contact application class.

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

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Using Application Classes”.

Secure Record Name Enter a record name to enable setID security searching.

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

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

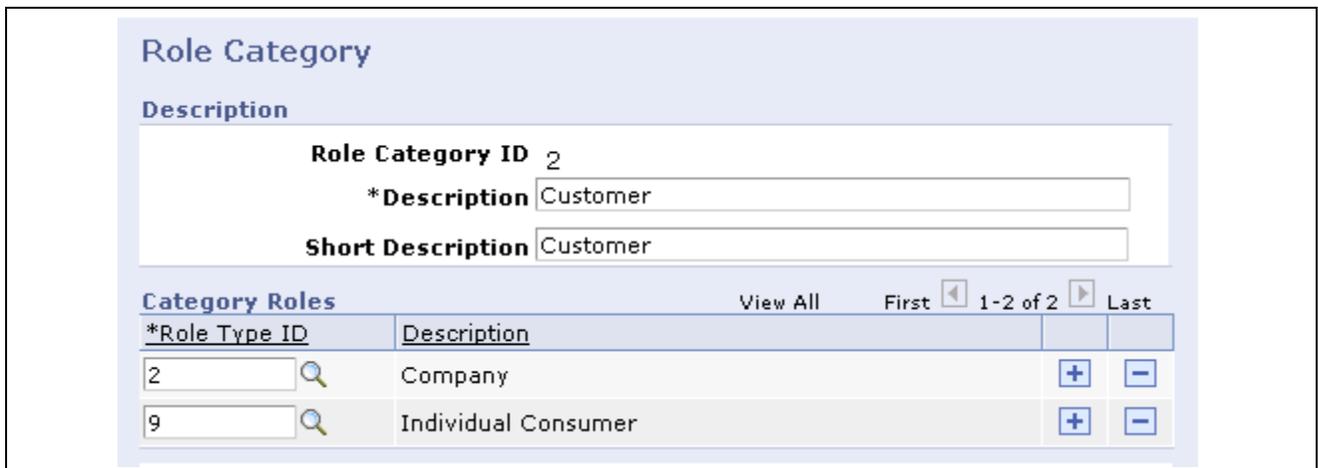
See Also

[Chapter 3, “Defining Control Values for Business Objects,” Defining Component Transfer Navigation, page 35](#)

[Chapter 14, “Using Business Object Search and Quick Create Functionality,” page 263](#)

Modifying and Adding Role Categories

Access the Role Category page.



Role Category page

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

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

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

Defining Relationship Types and Relationship Categories

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

This section discusses how to:

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

Pages Used to Define Relationship Types and Relationship Categories

Page Name	Object Name	Navigation	Usage
Relationship Type	BO_REL_TYPE	Set Up CRM, Common Definitions, Customer, Relationship Type, Relationship Type	Modify and add relationship types.
Relationship Category	BO_REL_CATEGORY	Set Up CRM, Common Definitions, Customer, Relationship Category, Relationship Category	Define categories of relationships.

Modifying and Adding Relationship Types

Access the Relationship Type page.

Relationship Type page

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

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

- Relationship Type ID** Displays the identification code that is associated with the relationship type.

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

- Hierarchical** Select to define a hierarchical relationship. Relationship hierarchies show parent-child relationships between business objects and are graphically represented with a tree format in the relationship viewer. In hierarchical relationships, the business object participating in the Role Type ID 1 field is interpreted as the parent, and the business object in Role Type ID 2 is the child.

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

- Publish EIP** (publish enterprise integration points) Select to include the relationship data when publishing a CDM application message.

Relationship Structure

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

Role Type ID 1 and Role Type ID 2	Select the role types that can participate in the relationship. Role types are established on the Role Type page.
Role Verb 1 and Role Verb 2	Enter a verb clause that describes the role played by business objects that participate in the relationships of this type.
Role Cardinality	Select the number of business objects that can participate in the relationship role: <i>One</i> or <i>Many</i> . If the value is <i>One</i> for role type 1 or 2, only one business object is defined in the specified role for a given instance of the relationship. If the value is <i>Many</i> , you can define minimum and maximum values for the number of business objects that are defined in the specified role.
Role Optionality	Select if this type of relationship is required when adding a role.
Minimum and Maximum	Enter the minimum and maximum values for the number of objects that can participate in this relationship. If no maximum constraint exists, select the Unlimited check box.
Capture Contact Methods	Select the parties in the relationship for which you want to capture contact methods. For example, when capturing the contact methods for a contact in a relationship with a company, you do not specify a relationship contact method for the company, but you do specify a relationship contact method for the contact.
Enabled for Basic Data	PeopleSoft CRM uses this field in system data to determine whether a summarization of information (basic data) is stored for the relationship. Basic data integrates with PeopleSoft Enterprise Marketing and PeopleSoft Enterprise Online Marketing and is used by mobile applications.

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

See Also

[Chapter 8, “Working with the Relationship Viewer,” page 101](#)

Defining Relationship Categories

Access the Relationship Category page.

Relationship Category

Description

Relationship Category ID 11

***Description**

Short Description

Relationships in Category

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

*Relationship Type ID	Bus Object Relationship Name	Role Type 1 Name	Role Type 2 Name		
<input type="text" value="73"/>	Primary Contact for BC Org Sh2	Contact	Ship To Organization	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="79"/>	Primary Contact for BC Ind Sh2	Contact	Ship To Individual	<input type="button" value="+"/>	<input type="button" value="-"/>

Relationship Category page

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

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

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

See Also

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

Configuring Address Books

This section discusses how to define contact information entries.

Page Used to Configure Address Books

Page Name	Object Name	Navigation	Usage
Address Book Configuration	BO_TYPE_ABE	Set Up CRM, Common Definitions, Customer, Address Book Configuration, Address Book Configuration	Define contact information entries for a business object type.

Defining Contact Information Entries

Access the Address Book Configuration page.

Address Book Configuration

Description

Business Object Type ID 2

Description Organization

Short Description Org.

Contact Info Configuration

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

Address Book Configuration page

Contact Info Configuration

Description

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

See Also

[Chapter 4, “Defining Name and Address Information for Business Objects,” Address Books in CRM, page 48](#)

[Chapter 4, “Defining Name and Address Information for Business Objects,” Contact Information on CRM Components, page 49](#)

Setting Up Contact Methods

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

This section discusses how to:

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

Pages Used to Set Up Contact Methods

Page Name	Object Name	Navigation	Usage
Contact Method Use	CM_USE	Set Up CRM, Common Definitions, Customer, Contact Method Use, Contact Method Use	Maintain contact method uses.
Contact Method Type	CM_TYPE	Set Up CRM, Common Definitions, Customer, Contact Method Type, Contact Method Type	Maintain contact method types.
Contact Method Purpose Type	CM_PURPOSE_TYPE	Set Up CRM, Common Definitions, Customer, Contact Method Purpose Type, Contact Method Purpose Type	Maintain contact method purpose types.

Maintaining Contact Method Uses

Access the Contact Method Use page.

Description Enter a description for the contact method use.

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

Modifying Contact Method Types

Access the Contact Method Type page.

Contact Method Type

Contact Method Type

Contact Method Type ID 2

***Description** Phone Contact Method

Short Description Phone

Capture for Quick Create Many

Uses View All First 1 of 1 Last

*Priority	Contact Method Use ID		
			+ -

Roles View All First 1-8 of 8 Last

*Priority	Role Type ID			
16	Company		+ -	
1	Site		+ -	
6	Worker		+ -	
7	Contact		+ -	
3	Individual Consumer		+ -	
17	Partner		+ -	
5	Partnership		+ -	
4	Alternate Capacity		+ -	

Contact Method Type page (1 of 2)

Relationships View All First 1-10 of 12 Last

*Priority	Relationship Type ID		
3	Primary Contact / Company		+ -
6	Contact / Company		+ -
5	Primary Contact / Site		+ -
7	Contact / Site		+ -
4	Primary Contact / Consumer		+ -
8	Contact / Consumer		+ -
1	Primary Contact / Partner		+ -
11	Contact / Partner		+ -
10	Contact / Partnership		+ -
4	Primary Contact / Partnership		+ -

Contact Method Type page (2 of 2)

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

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

Contact Method Type

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

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

Uses

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

Contact Method Use ID Select the contact method uses that you want to associate with the contact method type.

Roles

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

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

Relationships

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

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

Maintaining or Adding Contact Method Purpose Types

Access the Contact Method Purpose Type page.

The screenshot shows a web page titled "Contact Method Purpose Type". Under the "Description" section, the following information is displayed:

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

Contact Method Purpose Type page

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

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

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

Defining Component Transfer Navigation

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

This section discusses how to define component transfer navigation paths.

Pages Used to Define Component Transfer Navigation

Page Name	Object Name	Navigation	Usage
Component Navigation - Description	RB_TXN_DEFN	Set Up CRM, Common Definitions, Component Configuration, Component Navigation, Description	Maintain component transfer navigation descriptions.
Component Navigation - Navigation Path	RB_TXN_MKT	Set Up CRM, Common Definitions, Component Configuration, Component Navigation, Navigation Path	Define component transfer navigation paths (the locations of the transaction pages to which users are transferred).

Defining Component Transfer Navigation Paths

Access the Component Navigation - Navigation Path page.

Component Navigation - Navigation Path page

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

- Market** Specify the name of the market with which the component is associated. A component is uniquely identified by its name and its market association. You can add records for each market.
- Menu Name, Menu Bar Name, Item Name, Component Name, and Page Name** Enter the complete navigation for the page to which the users transfer. Enter the PeopleSoft PeopleTools object names for the menu, menu bar, item name, component name, and page name.
- Record (Table) Name** Select the object name for the table that is populated by the specified page. Typically, this is the search record.

Defining Segment Codes

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

This section discusses how to define segment codes.

Page Used to Define Segment Codes

Page Name	Object Name	Navigation	Usage
Segment Code	RD_SEGMENT	Set Up CRM, Common Definitions, Customer, Segment Code, Segment Code	Define codes that represent customer attributes, such as a customer's market segment, priority, or value. For informational purposes, you can associate each company and consumer with a segment code.

Defining Segment Codes

Access the Segment Code page.

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

Defining Industries

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

This section discusses how to define industries.

Page Used to Define Industries

Page Name	Object Name	Navigation	Usage
Industry	RSF_INDUSTRY	Set Up CRM, Common Definitions, Customer, Industries, Industry	Define industries.

Defining Industries

Access the Industry page.

Industry page

SIC Code (standard industrial classification code) Enter the standard industrial classification code for this industry.

Parent Industry ID Enter the parent industry for this industry.

See Also

[Chapter 9, “Defining Company Business Objects,” page 115](#)

Defining National ID Types

This section discusses how to define national ID types.

Page Used to Define National ID Types

Page Name	Object Name	Navigation	Usage
National ID Type Table	NID_TYPE_TABLE	Set Up CRM, Common Definitions, Customer, National ID Type, National Identification Type	Define national ID types.

Defining National ID Types

Access the National Identification Type page.

National Identification Type page

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

National ID Format Enter the format for the national ID.

See Also

[Chapter 11, “Defining Person Business Objects,” Defining Information for Business Contacts, page 153](#)

Defining Customer Groups

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

This section discusses how to define customer groups.

Page Used to Define Customer Groups

Page Name	Object Name	Navigation	Usage
Customer Group Table	CUST_GROUP_TBL	Set Up CRM, Common Definitions, Customer, Customer Group, Customer Group Table	Define customer groups. You can assign customers to groups for reporting and administration purposes.

Defining Customer Groups

Access the Customer Group Table page.

Customer Group Table page

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

Defining Customer Data Management System Options

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

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

Page Used to Define Customer Data Management System Options

Page Name	Object Name	Navigation	Usage
Customer Data Management System Options	BO_INSTALLATION	Set Up CRM, Common Definitions, Customer, Customer Installation Options, Customer Data Management System Options	Define customer data management system options.

Defining Customer Data Management System Options

Access the Customer Data Management Systems Options page.

Customer Data Management System Options

System Settings

- Search for CM Before Adding** This feature allows you to search for an existing contact method based on all the fields you provide for a new contact method. If an exact match is found, then instead of adding a new Contact Method, the existing one will be used as a reference.
- Show Contact Method Search** This feature allows the user of the Customer Data Management components to enter contact method information into the page and then search for matching contact methods. If this option is not selected, the Search button will not be shown on the Edit Contact Method pages.
- Process Basic Data Summary** This feature will update the basic data tables and override the setting for the role. The basic data tables are used by PeopleSoft CRM Online Marketing, the data import process, and PeopleSoft CRM Mobile. The checkbox must be selected when these products are installed.
- Secure Quick Create Access** This feature restricts access to the Quick Create functionality based on the user's security access to the Customer Data Model components, as defined by the user's Permission List.
- Enable Bindings for Oracle** This feature enables the BO Search SQL generation for the Oracle platform utilizing bind variables. If unchecked, search criteria value are embedded into the SQL string and bind variables are not used.
- SCM Integrated Through EIP**

Default SetID for Inbound EIPs 

Customer Data Management System Options page (1 of 2)

Mobile Customer Options

Mobile Customer Options

- Enable Mobile Relationship Viewer**
- Enable Mobile 360-Degree View**

360 Out of Date Detection View All First 1-23 of 23 Last

Record (Table) Name	Field Name		
<input type="text" value="RC_CASE"/>	<input type="text" value="BO_ID_CONTACT"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="RC_CASE"/>	<input type="text" value="BO_ID_CUST"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="RF_SO_HDR"/>	<input type="text" value="BO_ID_CONTACT"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="RF_SO_HDR"/>	<input type="text" value="BO_ID_CUST"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="RI_DEFECT_VW"/>	<input type="text" value="BO_ID_CONTACT"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="RI_DEFECT_VW"/>	<input type="text" value="BO_ID_CUST"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="RI_OPPTY_VW"/>	<input type="text" value="BO_ID_CONTACT"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="RI_OPPTY_VW"/>	<input type="text" value="BO_ID_CUST"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="RI_RF_AGRCT_VW"/>	<input type="text" value="BO_ID_CONTACT"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Customer Data Management System Options page (2 of 2)

This page shows only the first few rows of the 360 Out of Date Detection grid.

System Settings

Process Basic Data Summary

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

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

SCM Integrated Through EIP (supply chain management integrated through enterprise integrations points)

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

Default SetID for Inbound EIPs (default setID for inbound enterprise integration points)

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

See [Chapter 17, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” page 299](#).

Mobile Customer Options

Mobile Customer Options

Select the mobile customer option for which you want to establish system-level defaults.

See *PeopleSoft Enterprise CRM 9 Mobile Applications PeopleBook*, “Setting Up Data Distribution for a Mobile Device,” Defining Mobile Customer Options.

Enable Mobile Relationship Viewer

Select to enable the relationship viewer in PeopleSoft Enterprise CRM Mobile.

Enable Mobile 360 Degree View

Select to enable the 360-degree view in PeopleSoft Enterprise CRM Mobile.

Mobile 360 Out-of-Date Detection Record Fields

Enter the records and fields that are used by PeopleSoft Enterprise CRM Mobile to check for out-of-date detection.

The records and fields equate to a portion of the 360-degree view tree. Currently, the PeopleSoft system provides these seven records and fields:

- RC_CASE (record) and BO_ID_CONTACT (field).
- RC_CASE (record) and BO_ID_CUST (field).
- RF_SO_HDR (record) and BO_ID_CONTACT (field).
- RF_SO_HDR (record) and BO_ID_CUST (field).
- RSF_LEAD (record) and BO_ID_CUST (field).
- RSF_OPPORTUNITY (record) and BO_ID_CONTACT (field).
- RSF_OPPORTUNITY (record) and BO_ID_CUST (field).

See Also

PeopleSoft Enterprise CRM 9 Mobile Applications PeopleBook, “Working with Customer, Task and Product Information on a Mobile Device”

Defining Basic Data Mappings

This section discusses how to:

- Map CDM properties to basic data tables.
- Clone basic data mappings.

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

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

See Also

Chapter 2, “Understanding Business Object Relationship Model Components,” Basic Data Tables, page 11

Pages Used to Define Basic Data Mappings

Page Name	Object Name	Navigation	Usage
Basic Data Mapping	BO_ROLE_MAP	Set Up CRM, Common Definitions, Customer, Basic Data Mapping, Basic Data Mapping	Map CDM role and relationship properties to basic data tables.
Basic Data Mapping Cloning	BO_ROLE_MAP_CLONE	Set Up CRM, Common Definitions, Customer, Basic Data Mapping, Basic Data Mapping Cloning	Clone an existing mapping to a new mapping.
Basic Data Enabled Roles page	BO_ROLE_MAP_ENABLE	Set Up CRM, Common Definitions, Customer, Basic Data Mapping, Basic Data Enabled Roles	View a summary list of the basic data mapping roles and relationships.

Mapping CDM Properties to Basic Data Tables

Access the Basic Data Mapping page.

The screenshot shows the 'Basic Data Mapping' page with the following details:

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

Navigation options include 'Find', 'View All', 'First', '1 of 5', and 'Last'. Below this is a table titled 'Property Mapping Details' with the following columns: 'From Property', 'From Record', 'From Field', 'To Record', and '*To Field'. The table lists 10 mappings:

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

Basic Data Mapping page

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

Basic Data Mapping

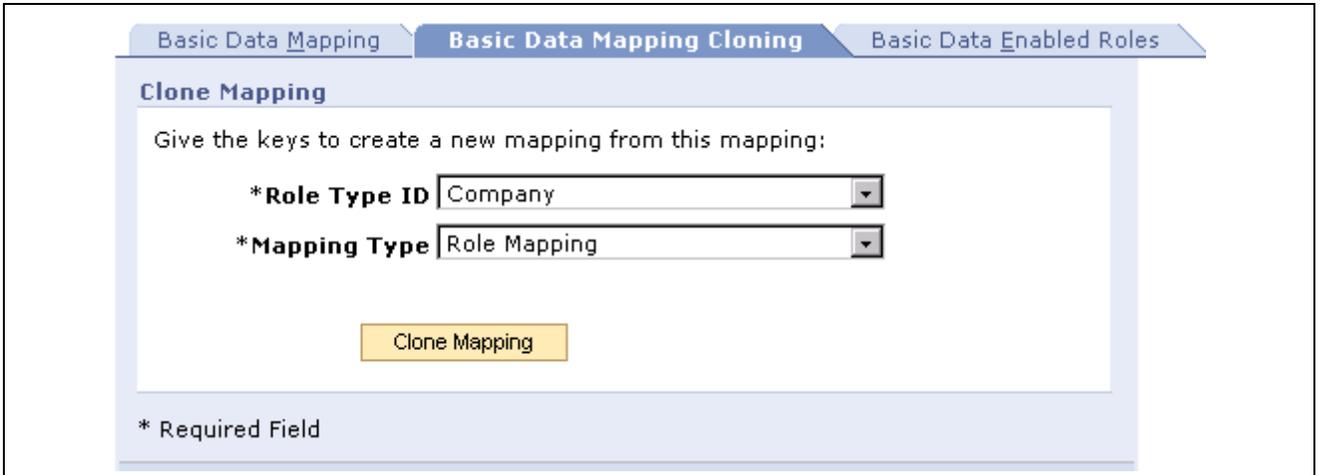
Information about the roles and relationships you are mapping appears in this page region. This is system data that you cannot modify on this page.

Property Mapping Details

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

Cloning Basic Data Mappings

Access the Basic Data Mapping Cloning page.



Basic Data Mapping Clone page

Clone Mapping

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

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

CHAPTER 4

Defining Name and Address Information for Business Objects

This chapter provides an overview of name and address information in PeopleSoft Enterprise Customer Relationship Management (CRM) and discusses how to:

- Update name information for business objects.
- View summary contact information.
- Maintain contact information for business objects.
- Define customer contacts.
- Define customer sites.

Understanding Name and Address Information in CRM

This section lists common elements and discusses:

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

See Also

[Chapter 9, “Defining Company Business Objects,” page 115](#)

[Chapter 10, “Defining Site Business Objects,” page 129](#)

[Chapter 11, “Defining Person Business Objects,” page 139](#)

Common Elements Used in this Chapter

Primary Name	The name that appears online when the business object is referenced in system transactions.
Contact Method Type	A method by which you contact a business object. CRM provides the <i>Address</i> , <i>Phone</i> , and <i>Email</i> contact methods with the system.
Contact Method Purpose Type	A further clarification of a contact method. As delivered, the <i>Home</i> and <i>Business</i> contact method purpose types are available for the Email contact method and the types <i>Home</i> , <i>Business</i> , <i>Fax</i> , and <i>Pager</i> contact method purpose

types are available for the Phone contact method. CRM provides additional contact method purpose types that you can configure and you can define additional types as needed.

See [Chapter 3, “Defining Control Values for Business Objects,” Contact Method Types and Contact Method Purpose Types, page 19.](#)

Contact Info Entry (contact information entry)

A grouping of contact methods. As delivered, contact information entries in CRM can contain one address, up to two email addresses, and up to four phone numbers.

See [Chapter 3, “Defining Control Values for Business Objects,” Configuring Address Books, page 30.](#)

Address Book

The collection of contact info entries for a business object.

Consumer

A person business object that has the consumer role.

Business Object Names in PeopleSoft Enterprise CRM

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

Important! Only the five most recently updated names are synced to the CDH. If you have more than five names for a business object and you want to ensure that the merged name is synced, you must update the merged name on the More Names page.

Address Books in CRM

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

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

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

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Setting Up General Options,” Setting Up Address Formats and Values

Contact Information on CRM Components

This section discusses:

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

See [Chapter 3, “Defining Control Values for Business Objects,” Defining Contact Information Entries, page 30.](#)

Summary Contact Information

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

Detailed Contact Information

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

The Contact Info page enables you to view and update:

- Address information.

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

- Contacts.

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

- Sites.

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

Advanced Options

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

Existing Address Searches

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

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

1. Enter any known address information, click the Look Up Address link on the Contact Info page for a company, consumer, contact, site, or worker, and select an address from the list of existing addresses. The system uses the information you enter as search criteria and returns any contact method records that match the criteria. You can select the applicable record, or, if none of the returned records apply, create a new contact record.
2. Enter known address information on the Update Address page and search for an existing address.

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

Contact Method Definition for Business Object Roles

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

Contact Method Definition for Business Object Relationships

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

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

If CDH and DQM are installed, you can select two or more contacts or sites and submit them for merge evaluation.

Updating Name Information

This section discusses how to add and update names.

Pages Used to Update Name Information

Page Name	Object Name	Navigation	Usage
Company - Details	RD_COMPANY_DETAILS	<ul style="list-style-type: none"> Customers CRM, Add Company, Company, Details Customers CRM, Search Company, Company, Summary Click the Details link.	Add or modify a company name.
Person - Details	RD_PERSON_DETAILS	<ul style="list-style-type: none"> Customers CRM, Add Person, Person, Details Customers CRM, Search Person, Person, Summary Click the Details link.	Add or modify a person's name.
Site - Name	RD_SITE_NAME_PG	<ul style="list-style-type: none"> Customers CRM, Add Site, Site, Primary Customers CRM, Search Site, Site, Primary Click the Name link.	Add or modify a site name.
Partner Company - Details	RD_PARTNER_DETAILS	<ul style="list-style-type: none"> Partners, Add Partner Company, Partner Company, Details Partners, Search Partner Company, Partner Company, Summary Click the Details link.	Add or modify a partner company name.
Company - More Names, Person - More Names, Partner Company - More Names, Site - More Names	RD_MORE_NAMES_SEC	Click the More Names link on the Details page for a company, person, or partner company.	<ul style="list-style-type: none"> Add and update names. Designate a primary name.

Adding and Updating Names

Access the More Names page for a company, person, site, or partner company.

More Company Names

Primary	*Name	*Name Type	Delete
<input checked="" type="checkbox"/>	<input type="text" value="MMA Property Management Group"/>	<input type="text" value="Preferred Name"/> ▼	<input type="button" value="Delete"/>
<input type="button" value="Add New Name"/>			

More Names page

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

Name Type Select the type of name, *Preferred Name*, *Alternate Name.*, or *Merged*.

Add New Name Click to enter an additional name.

See Also

[Chapter 3, “Defining Control Values for Business Objects,” Defining Business Object and Name Types, page 21](#)

Managing Summary Contact Information

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

Pages Used to Manage Summary Contact Information

Page Name	Object Name	Navigation	Usage
Company - Summary	RD_COMPANY_SUMMARY	Customers CRM, Search Company, Company, Summary, Summary	View name and primary contact information for a company and the primary contact of the Company (if available).
Company - Details	RD_COMPANY_DETAILS	Customers CRM, Search Company, Company, Summary, Details	Maintain the first contact information entry for the company.
Partner Company - Summary	RD_PARTNER_SUMMARY	Partners, Search Partner Company, Partner Company, Summary, Summary	View name and primary contact information for a partner company and the primary contact of the Partner Company (if available).
Partner Company - Details	RD_PARTNER_DETAILS	Partners, Search Partner Company, Partner Company, Summary, Details	Maintain the first contact information entry for the partner company.
Site - Primary	RD_SITE_MAIN_2	Customers CRM, Search Site, Site, Primary	View the name and maintain the first contact information entry of a Site, Service Location in the FIN component, Partnership, or Alternate Capacity business object.
Person - Primary	RD_PRSN_PRIMARY	<ul style="list-style-type: none"> Customers CRM, Search Person, Person, Primary Customers CRM, Add Person, Person, Primary 	View the name and maintain the first and second contact information entries of a person, worker, or client.

Maintaining Contact Information for Business Objects

This section discusses how to:

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

Pages Used to Maintain Contact Information

Page Name	Object Name	Navigation	Usage
Person - Contact Info	RD_PRSN_ADDR_BOOKS	<ul style="list-style-type: none"> • Customers CRM, Add Person, Person, Contact Info • Customers CRM, Search Person, Person, Contact Info 	Access contact information for a person, worker, or contact.
Company - Contact Info	RD_COMP_ADDR_BOOK	<ul style="list-style-type: none"> • Customers CRM, Search Company, Company, Contact Info Click the Company link. • Customers CRM, Add Company, Company, Contact Info Click the Company link. 	Access contact information for a company.
Partner Company- Contact Info	RD_PTNR_ADDR_BOOK	<ul style="list-style-type: none"> • Customers CRM, Search Partner Company, Partner Company, Contact Info, Addresses Click the Partner link. • Customers CRM, Add Partner Company, Partner Company, Contact Info, Addresses Click the Partner link. 	Access contact information for a partner company.

Page Name	Object Name	Navigation	Usage
Site - Contact Info	RD_SITE_ADDR_BOOK	<ul style="list-style-type: none"> Customers CRM, Search Site, Site, Contact Info, Site <p>Click the Site link.</p> <ul style="list-style-type: none"> Customers CRM, Add Site, Site, Contact Info, Site <p>Click the Site link.</p>	Access contact information for a site.
Company - Address Book, Person - Address Book, Partner Company - Address Book, Site - Address Book	ABE_DETAIL	<ul style="list-style-type: none"> Click a Description link in the Contact Info Entries grid on the Contact Info page for a company, person, partner company, or site. Click the Create Entry button on the Contact Info page for a company, person, partner company, or site. 	Maintain contact information entries for a person, company, site, or partner company.
Address Search	ABE_ADD_LOOKUP_SEC	Click the Look Up Address link on the Contact Info page for a company, person, partner company, or site.	Select an existing address to use or modify as the address for a company, person, partner company, or site.
Company - Update Address, Person - Update Address, Partner Company - Update Address, Site - Update Address	RD_ADDR_DETAIL	<p>Expand the Advanced Options section on the Contact Info page for a company, person, partner company, or site.</p> <p>Select the Address tab.</p> <p>Click the Edit button next to any listed address.</p>	Update address detail.
, Company - Update Phone, Person - Update Phone, Partner Company - Update Phone, Site - Update Phone	RD_PHONE_DETAIL	<p>Expand the Advanced Options section on the Contact Info page for a company, person, partner company, or site.</p> <p>Select the Phone tab and click the Edit button next to any listed .</p>	Update phone detail.
, Company - Update Email, Person - Update Email, Partner Company - Update Email, Site - Update Email	RD_EMAIL_DETAIL	<p>Access the Contact Info page for a company, person, partner company, or site.</p> <p>Expand the Advanced Options section.</p> <p>Select the Email tab.</p> <p>Click the Edit button next to any listed email address.</p>	Update email detail.

Accessing Contact Information

Access the Contact Info page for a company, site, partner company, or person.

The screenshot displays the 'Company - Contact Info' page. At the top, there are navigation buttons: Save, 360-Degree View, Search, Add Company, Add to My Contacts, and Personalize. Below this, contact details are shown for 'Customer Sparkle Clean Laundromats', including contact name 'Becky Lee Campton', phone number '508/714-7894', location 'Little Rock, AR, USA', job title 'Executive Assistant', and email 'blcampton@sparkle.com'. A navigation bar includes tabs for Account, Team, Tasks, Call Reports, Billing Accounts, Plans, Notes, and Contact Info. Below the navigation bar, there are links for Contacts, Company, and Sites. The main section is titled 'Contact Info Entries' and contains a table with columns for Description, Address, Phone, and Email. The table lists five entries, with the first entry being the primary contact. A 'Create Entry' button is located at the bottom of the table.

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

Company - Contact Info page

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

See [Chapter 3, "Defining Control Values for Business Objects," Configuring Address Books, page 30](#).

Contact Info Entries

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

Create Entry Click to add a new contact information entry.

Advanced Options

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

The screenshot shows the 'Advanced Options' section for 'Contact Info'. It has three tabs: 'Address', 'Phone', and 'Email'. The 'Address' tab is selected. Under 'Address Information', there is a dropdown for '*Description' set to 'Contact' and a date field for '*Address(es) effective as of' set to '04/30/2004'. Below this is an 'Address Summary' table:

Primary	Address	Purpose	Start Date	End Date	Uses	
<input checked="" type="checkbox"/>	1212 Main Street, Walnut Creek, CA, 94596, USA	Home	10/30/2001			Edit
<input type="checkbox"/>	7623 Clearwater Rd, Little Rock, AR, 98745, USA	Business	02/09/2002			Edit

Contact Info page - Advanced Options section

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

Maintaining Contact Information

Access the Address Book page for a company, person, partner company, or site.

The screenshot shows the 'Address Book' page for 'Alan Bailey'. It has a 'Company' header and a 'Contact Info Entries' section. The '*Description' is set to 'Home'. There are three main sections: 'Phone', 'Email', and 'Address'.

Phone

*Type	Country Code	Number	Ext/PIN
Business		925/694-2001	
Cellular			
FAX			
Pager			

Email

*Type	Email Address
Business	aklcrm@yahoo.com
Other	

Address

Look up Address

*Type: Mailing

Physical Location: [Empty]

*Country: United States

Address 1: 34 Ebrima Drive

Address 2: [Empty]

Address 3: [Empty]

City: Pleasanton

County: [Empty]

State: CA [California](#)

Postal: [Empty]

Time Zone: Pacific Time (US), Tijuana

Region: [Empty]

Address Book page

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

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

See [Chapter 5, “Defining Purchasing Options for Companies, Consumers, and Sites,”](#) page 69.

Selecting Existing Addresses

Access the Address Search page for a company, person, partner company, or site.

The screenshot shows the 'Address Search' interface. At the top, there are navigation links: 'Search Results', 'Find', 'View All', 'First', '1-2 of 2', and 'Last'. Below this is a table with two columns: 'Select' and 'Address'. The table contains two identical rows, each with a 'Select' button and the address '7623 Clearwater Rd Little Rock, AR 98745'.

Address Search page

Select a listed address.

Updating Address Detail

Access the Update Address page for a company, person, partner company, or site.

The screenshot shows the 'Update Address' page for a 'Person (Business Contact)'. The page title is 'Update Address' under the heading 'Address Information'. The form contains the following fields:

- *Purpose:** Home (dropdown menu)
- Physical Loc:** (empty text field)
- *Country:** United States (dropdown menu)
- Address 1:** 1212 Main Street (text field)
- Address 2:** (empty text field)
- Address 3:** (empty text field)
- City:** Walnut Creek (text field)
- County:** (empty text field)
- State:** CA (text field) with a magnifying glass icon and 'California' displayed to the right.
- Postal:** 94596 (text field)
- Phone:** 800/789-6547 (dropdown menu)
- Time Zone:** PST (dropdown menu) with 'Pacific Time (US), Tijuana' displayed to the right.
- Region:** Northern California (dropdown menu)

Update Address page (1 of 2)

Address Effective Dates and Applications

Original Date Address is Effective
Start Date 10/30/2001 **End Date** 12/31/2999

Current Date Address is Effective
Start Date 31 **End Date** 31

Roles Address Applies to

Description	Start Date	End Date
Contact	10/30/2001 31	<input type="text"/> 31
Individual Consumer	<input type="text"/> 31	<input type="text"/> 31
Bill To Individual	<input type="text"/> 31	<input type="text"/> 31
Ship To Individual	<input type="text"/> 31	<input type="text"/> 31
Sold To Individual	<input type="text"/> 31	<input type="text"/> 31

Relationships Address Applies to

Description	Start Date	End Date
Contact / Company (Sparkle Clean Laundromats)	<input type="text"/> 31	<input type="text"/> 31

[Return to Address Summary Page](#)

Update Address page (2 of 2)

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

Create Using Entered Address Click to create the address by using the information that you enter.

Address Effective Dates and Applications

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

Roles Address Applies to

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

Updating Phone Detail

Access the Update Phone page for a company, person, partner company, or site.

Person (Business Contact)

Update Phone

Phone Information

***Purpose**

Country Code

***Number**

Extension

Phone Effective Dates and Applications

Original Date Phone is Effective
Start Date 02/09/2002 **End Date** 12/31/2999

Current Date Phone is Effective
Start Date **End Date**

Roles Phone Applies to

Description	Start Date	End Date
Individual Consumer	02/09/2002 <input type="button" value="31"/>	<input type="text"/> <input type="button" value="31"/>
Contact	02/09/2002 <input type="button" value="31"/>	<input type="text"/> <input type="button" value="31"/>

Relationships Phone Applies to

Description	Start Date	End Date
Contact / Company (Sparkle Clean Laundromats)	<input type="text"/> <input type="button" value="31"/>	<input type="text"/> <input type="button" value="31"/>

[Return to Phone Summary Page](#)

Update Phone page

Phone Effective Dates and Applications

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

Roles Phone Applies to

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

Updating Email Detail

Access the Update Email page for a company, person, partner company, or site.

Person (Business Contact)

Update Email

Email Information

*Purpose

*Email Address

Email Effective Dates and Applications

Original Email is Effective

Start Date 10/18/2001 End Date 12/31/2999

Current Email is Effective

Start Date End Date

Roles Email Applies to

Description	Start Date	End Date
Individual Consumer	10/18/2001 <input type="button" value="31"/>	<input type="text"/> <input type="button" value="31"/>
Contact	10/18/2001 <input type="button" value="31"/>	<input type="text"/> <input type="button" value="31"/>

Relationships Email Applies to

Description	Start Date	End Date
Contact / Company (Sparkle Clean Laundromats)	10/18/2001 <input type="button" value="31"/>	<input type="text"/> <input type="button" value="31"/>

 [Return to Email Summary Page](#)

Update Email page

Email Effective Dates and Applications

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

Roles Email Applies to

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

See Also

[Chapter 3, “Defining Control Values for Business Objects,” Setting Up Contact Methods, page 31](#)

Defining Customer Contacts

This section discusses how to define contacts for a customer or partner company.

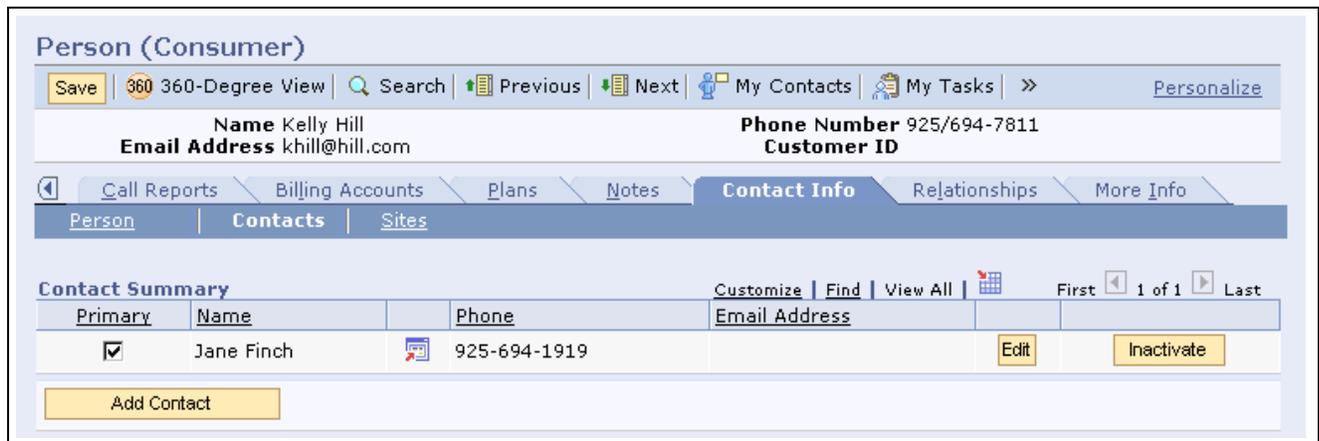
Pages Used to Define Customer Contacts

Page Name	Object Name	Navigation	Usage
Person - Contacts	RD_CONSUMER_REP	<ul style="list-style-type: none"> Customers CRM, Search Person, Person, Summary Click the Edit Consumer Information link or the Add Consumer Information link. Select the Contact Info tab and click the Contacts link. Customers CRM, Add Person, Person, Details Click the Add Consumer Information link. Select the Contact Info tab and click the Contacts link. 	<p>Maintain the list of contacts for a person.</p> <p>Note. You can only define contacts for a person with the consumer role.</p>
Company - Contacts	RD_COMPANY_CNTCT_2	<ul style="list-style-type: none"> Customers CRM, Add Company, Company, Details Select the Contact Info tab. Click the Contacts link. Customers CRM, Search Company, Company, Summary Select the Contact Info tab. Click the Contacts link. 	<p>Maintain the list of contacts that are defined for a company.</p>
Partner Company - Contacts	RD_PTNR_CONTACTS	<ul style="list-style-type: none"> Partners, Add Partner Company, Partner Company, Details Select the Contact Info tab. Click the Contacts link. Partners, Search Partner Company, Partner Company, Summary Select the Contact Info tab. Click the Contacts link. 	<p>Maintain the list of contacts for a partner company.</p>
Site - Contacts	RD_SITE_CNTCT_2	<ul style="list-style-type: none"> Customers CRM, Add Site, Site, Primary Select the Contact Info tab. Click the Contacts link. Customers CRM, Search Site, Site, Primary Select the Contact Info tab. Click the Contacts link. 	<p>Maintain the list of contacts for a site.</p>

Page Name	Object Name	Navigation	Usage
Create Contact of <object>	RBQ_QCREATE	Click the Create Entry button on the Contacts page for a company, consumer, partner company, or site.	Create a contact of a company, consumer, partner company, or site.
Modify <contact>	RD_REP_MAINTAIN	Click the Description link on the Contacts page for a company, consumer, partner company, or site.	Maintain contact information entries for a contact of a company, consumer, partner company, or site. This page is similar in format and usage to the Create Contact of <customer> page.
Merge Request for Sites	RD_REP_MAINTAIN	Click the Select Contacts for Merge Request button on the Contact Info: Contacts page for a company or a person with the Consumer role.	Submit two or more sites for merge evaluation.

Maintaining the Contact List

Access the Contacts page for a company, partner company, site, or person with the consumer role.



Contact Info - Contacts page

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

Select Contacts for Merge Request Click this button to access the Merge Request for Contacts page, which enables you to select two or more contacts and submit them to the Data Librarian for merge evaluation. This button appears only if CDH and DQM are installed.

Creating Contacts of Customers

Access the Create Contact of <object> page.

Create Contact Of Kelly Hill

SetID CRM01 **Appliance**

Consumer

Name [Kelly Hill](#)

Currency US Dollar

Purchasing Options

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

Contact Info Entries

Contact Info Entry Home ▼ Display Entry

Contact Info

Description Home

Phone				Address
Type	Country Code	Number	Ext/PIN	
Business		925/694-7811		Address Business More... 4440 Rosewood Dr Pleasanton, CA 94588

Email	
Type	Email Address
Business	khill@hill.com

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

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

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

Contact

Enter contact information about the contact in this section.

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

Sold To Contact, Bill To Contact, and Ship To Contact

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

Search Existing Person

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

Use <customer> Address Select to use the customer's address for the contact.

See Also

[Chapter 11, "Defining Person Business Objects," Defining Information for Business Contacts, page 153](#)

Defining Customer Sites

This section lists the pages used to maintain site lists.

Pages Used to Define Sites

Page Name	Object Name	Navigation	Usage
Company - Sites	RD_COMPANY_SITE_2	<ul style="list-style-type: none"> Customers CRM, Add Company, Company, Contact Info <p>Click the Sites link.</p> <ul style="list-style-type: none"> Customers CRM, Search Company, Company, Contact Info <p>Click the Sites link.</p>	Maintain company sites.
Person - Sites	RD_CONSUMER_SITE_2	<ul style="list-style-type: none"> Customers CRM, Add Person, Person, Details <p>Click the Add Consumer Information link.</p> <p>Select the Contact Info tab and click the Sites link.</p> <ul style="list-style-type: none"> Customers CRM, Search Person, Person, Summary <p>Click the Edit Consumer Information link or the Add Consumer Information link.</p> <p>Select the Contact Info tab and click the Sites link.</p>	Maintain sites for a person. Note. You can only maintain sites for a person with the consumer role.
Create Site of <customer>	RBQ_QCREATE	Click the Create Site button on the Sites page for a company or person who has the consumer role.	Add a site to a company or person. This page is similar in usage to the Create Contact of <customer> page.
Modify <site>	RBQ_QCREATE	Click the Edit button next to a listed site on the Sites page for a company or person who has the consumer role.	Maintain contact information and purchasing options for a customer site.
Merge Request for Sites	RBQ_QCREATE	Click the Select Sites for Merge Request button on the Contact Info: Sites page for a company or a person with the Consumer role.	Submit two or more sites for merge evaluation.

Maintaining Site Lists

Access the Company - Sites page

The screenshot shows a web interface for a 'Company' record. At the top, there are navigation buttons: 'Save', '360 360-Degree View', 'Search', 'Previous', 'Add Company', 'Add to My Contacts', and 'Personalize'. Below this, the company details are displayed in two columns: 'Customer MMA Property Management Group' and 'Location Circle Pines, MN, USA'; 'Contact Teri Thomas' and 'Job Title Management Associate'; and 'Phone 651/785-2546' and 'Email tthomas@mma.com'. A tabbed interface below shows 'Contact Info' as the active tab, with other tabs for 'Billing Accounts', 'Plans', 'Notes', 'Relationships', 'More Info', and 'Attributes'. Under 'Contact Info', there are sub-tabs for 'Contacts', 'Company', and 'Sites'. The 'Company Sites' section features a table with columns for 'Site Name', 'Address', and 'Site ID'. Each row includes an 'Edit' button. A 'Create Site' button is located at the bottom of the table area.

Site Name	Address	Site ID
Minneapolis	1200 Lake Drive, Circle Pines, MN, 55014, USA	478
Redwood Falls	7890 Ramsey Creek, Redwood Falls, MN, 56293, USA	479
Roseville	2665 Civic Center Drive, Roseville, MN, 55113, USA	480
Saint Paul	7550 Alden Way NE, St Paul, MN, 55104, USA	481

Company Sites page

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

Select Sites for Merge Request

Click this button to access the Merge Request for Sites page, which enables you to select two or more sites and submit them to the Data Librarian for merge evaluation. This button appears only if CDH and DQM are installed.

CHAPTER 5

Defining Purchasing Options for Companies, Consumers, and Sites

This chapter provides an overview of purchasing options and discusses how to:

- Define purchasing options for customers.
- Select purchasing options for customer addresses.
- Select purchasing options for customer contacts.
- Select purchasing options for customer sites.

Understanding Purchasing Options

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

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

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

Purchasing Option Integrations

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

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

PeopleSoft Financial Management Solutions and PeopleSoft Supply Chain Management also enable you to define additional attributes and processing options and to view the updated information in PeopleSoft CRM.

See Also

[Chapter 9, “Defining Company Business Objects,” page 115](#)

[Chapter 10, “Defining Site Business Objects,” page 129](#)

[Chapter 11, “Defining Person Business Objects,” page 139](#)

[Chapter 12, “Defining Workers,” page 157](#)

[Chapter 17, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” page 299](#)

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Defining Purchasing Options for Customers

This section discusses how to define purchasing options.

Pages Used to Define Purchasing Options for Customers

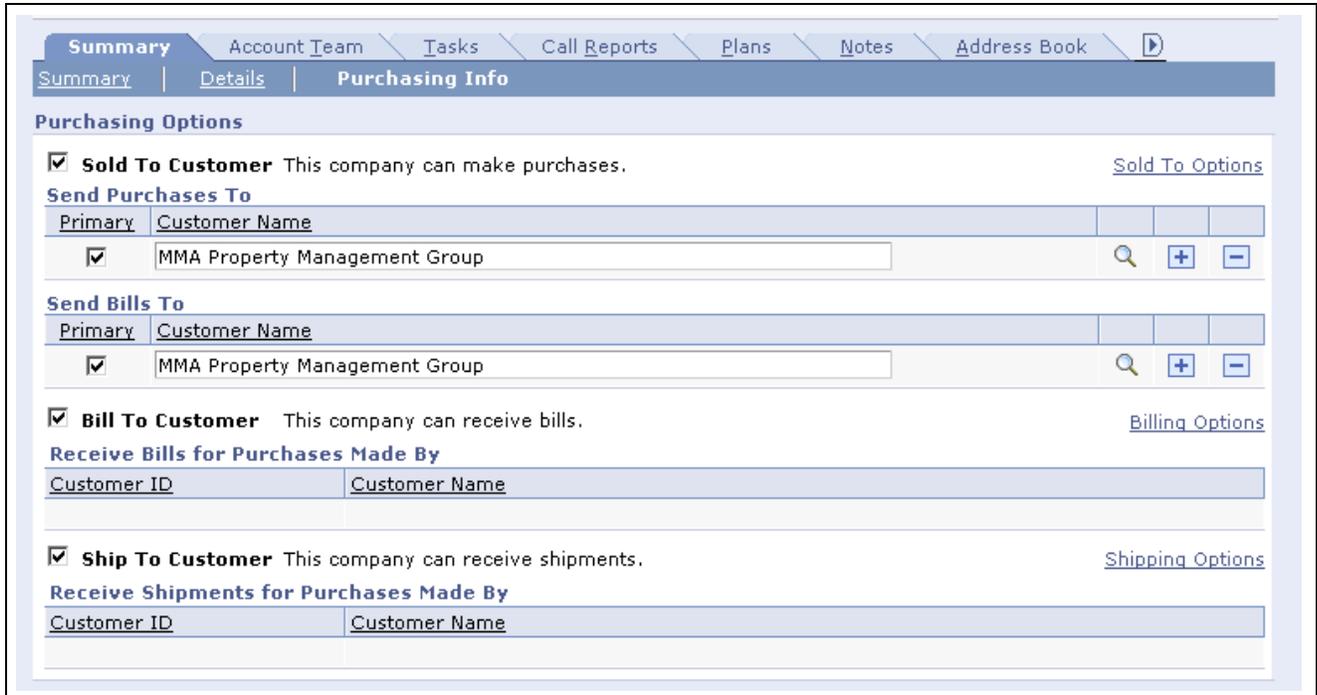
Page Name	Object Name	Navigation	Usage
Company - Details	RD_COMPANY_DETAILS	<ul style="list-style-type: none"> Customers CRM, Search Company, Company Click the Details link. Customers CRM, Add Company, Company 	Select purchasing options for the company.
Company - Purchasing	RD_COMPANY_CUST_OP	<ul style="list-style-type: none"> Customers CRM, Search Company, Company Click the Purchasing Info link. Customers CRM, Add Company, Company Click the Purchasing Info link. 	Enter purchasing option details for the company.
Site - Details	RD_SITE_MAIN_2	<ul style="list-style-type: none"> Customers CRM, Search Site, Site Click the Details link. Customers CRM, Add Site, Site 	Select purchasing options for the site.

Page Name	Object Name	Navigation	Usage
Site - Purchasing	RD_SITE_CUST_OP_2	<ul style="list-style-type: none"> Customers CRM, Search Site, Site Click the Purchasing Info link. <ul style="list-style-type: none"> Customers CRM, Add Site, Site Click the Purchasing Info link	Enter purchasing option details for the site.
Person - Details	RD_CONSUMER_BC_OPT	<ul style="list-style-type: none"> Customers CRM, Search Person, Add Person Click the Add Consumer Information link. <ul style="list-style-type: none"> Customers CRM, Search Person, Person If the information that appears is for the Contact role, click the Edit Consumer Information or Add Consumer Information link. Click the Details link.	Enable purchasing options for the selected consumer. Note. Purchasing options for Persons are available only for a person with the Consumer role.
Person - Purchasing	RD_CONSUMER_BC_OPT	Click the Purchasing Info link on the Person page for a person with the Consumer role.	Enable purchasing options for the selected consumer. Note. Purchasing options for Persons are available only for a person with the Consumer role.

Entering Purchasing Detail

Access the Purchasing Info page.

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



Company - Purchasing Info page

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

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

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

Sold-To Options

Click the Sold-To Options link.

The screenshot displays the 'Purchasing Info: Sold-To Options' page. At the top, there are navigation tabs: Summary, Account Team, Tasks, Call Reports, Plans, Notes, and Address Book. Below these are sub-tabs: Summary, Details, and Purchasing Info. The main content area is titled 'Sold-To Options' and includes a search bar with 'Find | View All' and pagination 'First 1 of 1 Last'. The options are organized into several sections:

- Effective Date:** 01/01/2000
- Product ID Preference:** Radio buttons for System Product ID (selected) and Customer Product ID.
- Allow Product Substitutions:**
- Restocking Fee:**
- Freight Charge Method:**
- Shipping Container Label:**
- Carton Label Format:**
- Pricing Options:**
 - Discount Days:**
 - Exclusive Pricing ID:**
 - Arbitration Plan:** A search field with a magnifying glass icon.
 - Load Price Rule:**

At the bottom left, there is a link: [Return to Purchasing Options](#).

Purchasing Info: Sold-To Options page

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

Shipping Options

Click the Shipping Options link.

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

Billing Options

Click the Billing Options link.

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

Credit Analyst

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

See [Chapter 17, "Managing Enterprise Integration for PeopleSoft Enterprise CRM," Creating and Maintaining Credit Analyst Codes, page 319.](#)

Collector

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

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

Payment Terms Code

Enter the payment terms for informational purposes.

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

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

Selecting Purchasing Options for Customer Addresses

This section discusses how to select purchasing options for addresses.

Pages Used to Select Purchasing Options for Customer Addresses

Page Name	Object Name	Navigation	Usage
Contact Info	ABE_DETAIL	<ul style="list-style-type: none"> Customers CRM, Search Company, Company, Contact Info Click the Addresses link. Click a Description link. Customers CRM, Search Site, Site, Contact Info Click the Addresses link. Click a Description link. Customers CRM, Search Person, Person, Summary Click the Add Consumer Information link. Select the Contact Info tab. Click the Addresses link. Click a Description link. 	<p>Select purchasing options that apply to an address of a company, site, or person.</p> <p>Note. Purchasing options are available from the Person component only if the person has the Consumer role.</p>

Selecting Purchasing Options for Addresses

Access the Contact Info page for a company, site, or consumer.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Contact Information for Business Objects, page 53.](#)

Selecting Purchasing Options for Customer Contacts

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

Pages Used to Select Purchasing Options for Customer Contacts

Page Name	Object Name	Navigation	Usage
Person - Contacts	RD_CONSUMER_REP	<ul style="list-style-type: none"> Select the Contact Info tab on the Person component for a person who has the Consumer role. Click the Contacts link. Customers CRM, Add Person, Person, Primary Click the Add Consumer Information link. Select the Address Book tab. Click the Contacts link. 	<p>Maintain the list of contacts for a person.</p> <p>Note. You can only define contacts for a person with the Consumer role.</p>
Company - Contacts	RD_COMPANY_CNTCT_2	<ul style="list-style-type: none"> Customers CRM, Add Company, Company, Contact Info Click the Contacts link. Customers CRM, Search Company, Company, Contact Info Click the Contacts link. 	Maintain the list of contacts for a company.
Site - Contacts	RD_SITE_CNTCT_2	<ul style="list-style-type: none"> Customers CRM, Add Site, Site, Contact Info Click the Contacts link. Customers CRM, Search Site, Site, Contact Info Click the Contacts link. 	Maintain the list of contacts for a site.
Contact Info	ABE_DETAIL	Click the Add Contact button next to a listed contact on the Contacts page for a company, site, or person with the Consumer role.	Select purchasing options that apply to an address of a company, site, or person.
Maintain Contact	RD_REP_MAINTAIN	Click the Edit Contact button next to a listed contact on the Contacts page for a company, site, or person with the consumer role.	<p>Maintain purchasing options for a contact.</p> <p>Designate a contact as primary for a purchasing option.</p>

Selecting Purchasing Options for Customer Contacts

Access the Contact Info page for a customer contact.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Contact Information for Business Objects, page 53.](#)

Maintaining Purchasing Options for Customer Contacts

Access the Maintain Contact page for a customer contact.

See Chapter 4, “Defining Name and Address Information for Business Objects,” Defining Customer Contacts, page 60.

Selecting Purchasing Options for Customer Sites

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

See Also

Chapter 4, “Defining Name and Address Information for Business Objects,” Defining Customer Sites, page 65

Pages Used to Select Purchasing Options for Customer Sites

Page Name	Object Name	Navigation	Usage
Company - Sites	RD_COMPANY_SITE_2	<ul style="list-style-type: none"> Customers CRM, Add Company, Contact Info Click the Sites link. Customers CRM, Search Company, Contact Info Click the Sites link. 	Maintain company sites.
Person - Sites	RD_CONSUMER_SITE_2	<ul style="list-style-type: none"> Customers CRM, Add Person, Details Click the Add Consumer Information link. Select the Contact Info tab and click the Sites link. Customers CRM, Search Person, Summary Click the Edit Consumer Information link or the Add Consumer Information link. Select the Contact Info tab and click the Sites link. 	Maintain sites for a person. Note. You can only maintain sites for a person with the Consumer role.
Company - Edit Site, Person - Edit Site	RD_CUST_SITE_DTL	Click the Edit button next to any listed site on the Sites page for a company or consumer.	Select purchasing options for a customer site. Note. Purchasing options are available from the Person component only if the person has the Consumer role.
Company - Create Site, Person - Create Site	RD_CUST_SITE_DTL	Click the Create Site button on the Sites page for a company or person who has the Consumer role.	Select purchasing options for a customer site.

Defining Purchasing Options for Customer Sites

Access the Contact Info page for a customer site.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” Defining Customer Sites, page 65.](#)

CHAPTER 6

Defining Tax Exempt Certificate Information for Companies, Consumers and Sites

This chapter provides an overview of Tax Exempt Certificates and discusses how to work with Tax Exempt Certificate information.

Understanding Tax Exempt Certificates

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

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

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

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

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

Working with Tax Exempt Certificate Information

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

Page Used to Work with Tax Exempt Certificate Information

Page Name	Object Name	Navigation	Usage
Tax Exempt Certificate	RD_TAX_EXEMPT_COMP	<p>Click the Tax Exempt Certificate link on the Company - Summary page.</p> <p>Click the Tax Exempt Certificate link on the Consumer - Summary page.</p> <p>Click the Tax Exempt Certificate link on the Site - Summary page.</p>	Add, delete, or modify Tax Exempt Certificate information.

Working with Tax Exempt Certificate Information

Access the Tax Exempt Certificate page.

Tax Exempt Certificate page

Exemption Certificate and Issuing Authority

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

Tax Exempt Category

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

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

Exempt License

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

CHAPTER 7

Working with Business Object Profiles

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

- Specify a profile prefix.
- Create a profile request.
- Register a profile.
- Set up profile groups.
- View and update profile data.

Understanding Profiles

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

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

System and User-Defined Profile Data

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

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

Profile Usage

Consider these examples of the various ways to use profiles.

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

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

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

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

See Also

PeopleSoft Enterprise Online Marketing 9 PeopleBook, "PeopleSoft Online Marketing User Guide"

PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook, "PeopleSoft Marketing Applications Preface"

PeopleSoft Enterprise Performance Management Warehouse 9 PeopleBook

[Chapter 18, "Importing Data Into PeopleSoft Enterprise CRM," page 329](#)

Profile Data in the CDM

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

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

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

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

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

See Also

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

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

Common Elements Used in this Chapter

This section lists common elements and discusses profile data in the customer data model (CDM).

Profile Field	A specific bit of information that is captured about the customer. For example, contact lens customers of an optical supply seller might have profile fields for the preferred color, preferred type (extended wear or daily wear), brand preference, optometrist, prescription, date of last purchase, and care kit provided. Profile fields are keyed by BO_ID.
Profile Group	An arbitrary collection of profile fields for display purposes. For example, the optical supply seller might have a profile group for contact lens information, eyeglass information, and sunglass information.
Condition	Information that controls when the profile group is displayed. After you set up profile groups, you can define the conditions for displaying and updating a profile group in a component. A read-only profile summary appears on the primary page for every component that meets the conditions, and a profile information page for updating profiles is added to the component. For example, the condition for displaying the Contact Lens Info profile group in the Consumer component is that the consumer either previously purchased contact lenses or has requested contact lens information.

Specifying a Profile Prefix

This section discusses how to specify a profile prefix.

Page Used to Specify a Profile Prefix

Page Name	Object Name	Navigation	Usage
Profile Setup	RA_PROFILE_SETUP	Set Up CRM, Common Definitions, Profile Management, Profile Setup	Use to designate a record prefix value for manually-mapped user-defined profile records (tables).

Specifying a Profile Record Prefix

Access the Profile Setup page.



The screenshot shows a web page titled "Profile Setup". Below the title is the instruction "Setup the prefix for creating profile records." There is a label "Profile Record Prefix" followed by a text input field containing the value "BO".

Profile Setup page

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

Creating a Profile Request

This section discusses how to:

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

Understanding Profile Requests

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

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

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

Pages Used to Create a Profile Request

Page Name	Object Name	Navigation	Usage
Profiles	RA_PROFILE_SUMM	Set Up CRM, Common Definitions, Profile Management, Profile Definitions	Use to view summary information about all of your profiles and to access an existing profile or create a new profile.
Profile	RA_PROFILE_DTL	<ul style="list-style-type: none"> Click the profile name on the Profiles to edit an existing profile. Click the Add a New Profile button on the Profiles page to define a new profile. 	Use to define basic information about the profile.
Profile Fields - Field Summary	RA_ATTRIBUTE_SUMM	Click the Profile Fields tab.	Use to add new fields to a profile, or to view existing profile fields.
Profile Fields - Field Detail	RA_ATTRIBUTE_DTL	Click the Field Detail link on the Profile Fields page.	Use to define a new profile field or to edit an existing profile field.

Defining Profile Information

Access the Profile page.

Profile page

Group Type

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

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

Category

Shows the category to which the profile belongs.

Status

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

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

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

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

Select *Update* to edit an activated profile.

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

Profile Name

Enter a name for the profile.

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

Rows

Row selection determines how many unique rows of data can be entered into the profile table for each contact. Profiles can be defined as either one row or many rows. Once a profile is requested, you cannot change the row selection.

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

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

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

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

Profile Can Be Updated

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

Adding and Editing Profile Fields

Access the Profile Fields - Field Summary page.

Profile		Profile Fields		
Field Summary		Field Detail		
Order	Name	Use Type	Description	Field Status
1	SetID	Text	Setid	Active
2	Role Type	Choose One (with Rating)	Role Type	Active
3	External ID	Text	Alphanumeric identifier used to match person to an external system	Active
4	Source ID	Integer	Identifies the list or campaign that is the source of the name.	Active
5	First Name	Text	First Name	Active
6	Last Name	Text	Last Name	Active
7	Middle Name	Text	Middle Name	Active
8	Suffix	Text	Suffix (Jr., MD, etc.)	Active
9	Salutation	Text	Salutation (Mr., Ms., etc.)	Active
10	Social Security Number	Text	Social Security Number	Active
11	Gender	Choose One	Gender	Active
12	Email	Text	Email	Active

Profile Fields - Field Summary page

Note. Click column headings to change the sort order of the column.

Field Detail

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

Order

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

Name

Click the field name to access the profile field detail.

Use Type

Defines how the new fields are to be used. Values are:

- *Choose Many*: Defines a choice field that allows the respondent to select more than one response from a list of options.
- *Choose One*: Defines a choice field that allows the respondent to select only one response from a list of options.
- *Choose One (with rating)*: Defines a choice field that allows the respondent to select only one response from a list of options and assigns a numeric value to the choice. Also, specifies a numeric value associated with the choices. These values are to be used in the generated results.
- *Date*: Defines an entry field for a date.
- *Decimal*: Defines an entry field for numbers that allows decimal positions. An example is a currency entry.
- *File*: Defines an entry field for uploaded files.
- *Integer*: Defines an entry field for numbers that do not allow decimal positions. An example is a response to the question: How many children do you have?
- *Map to Existing Field*: Defines a choice field that relies on a prompt table for response options. Prompt tables are useful when the response options

are numerous. For example, you can use a prompt table field for state and country responses. Some common prompt tables (such as state and country) already exist within the system. If a prompt table does not exist, your system administrator will have to build it.

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

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

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

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

Field Status

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

Defining Field Detail

Access the Profile Fields - Field Detail page.

The screenshot shows the 'Profile Fields - Field Detail' page. At the top, there are tabs for 'Profile' and 'Profile Fields'. Below that, there are sub-tabs for 'Field Summary' and 'Field Detail'. The 'Field Detail' sub-tab is active. The page contains a form with the following fields:

- Name:** SetID
- Field Type:** Text
- Profile Question:**
- Description:** Setid
- Question:** Setid
- Length:** 5
- Field Status:** Active

At the top right of the form area, there are navigation controls: 'Find | View All', 'First', '1 of 46', and 'Last'.

Profile Fields - Field Detail page

Name Enter a name for the field.

Field Status	Displays the current status of the profile field and is always dependent on the status of the profile. Values are: <i>In Design</i> , <i>Active</i> , and <i>Update</i> . You can alter the profile field value when the field status is <i>In Design</i> or <i>Update</i> . When a profile is activated, all profile field statuses change to <i>Active</i> . To alter a profile field value, change the status of the profile to <i>Update</i> , then change the profile field status to <i>Update</i> .
Use Type	The use type value that you selected when you added the new field appears as the default value. Until the profile is activated, select a new option to change the field type.
Profile Question	Select to make this field available for use in a Web document or email blast.
Description	Enter a description of the field. The description appears on the Profile Fields - Field Summary page.
Question	If the profile field is specified as a profile question (the Profile Question check box is selected), enter a question that is designed to elicit a desired response. For example, if the value for the profile field is <i>Number of Pets</i> , your question might be: "How many pets are in your household?"

The following fields appear only with certain use types.

Order	Indicates the order in which you want the response options to appear. Change the order by changing the number in this field. Save the page to make the changes effective.
Choices	Enter the choice values for the profile field question. The value entered appears where the profile is used.
Rating	When <i>Choose One (with Rating)</i> is selected as the use type, enter a rating value for each option. Rating values are measured from the smallest numerical value to the highest. For example, a rating of 1 is less than a rating of 5.
Map to Field	When <i>Map to Existing Field</i> is selected as the use type, select the underlying prompt table.

Note. If the prompt table is unknown or does not exist, this field may be left blank. If the prompt table does not exist, a system administrator must build it before the profile is activated.

Length	When <i>Text or Text Block</i> is selected as the use type, enter a text field length. The maximum field length for the <i>Text</i> use type must be less than 254 characters. The maximum field length for the <i>Text Block</i> use type is less than 32700 characters.
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Modifying Active Profiles

You can make the following changes to activated profiles:

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

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

It is not required that profile changes be applied to all documents. In fact, there are cases where you will not want to change a document. For example, you can insert a profile into two or more documents if you intend to offer different choices to a particular question. By modifying the choices on the profile, you can insert the version with the appropriate choices into the different documents.

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

Making Changes that Do Not Require a New Request

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

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

1. Change the status of the profile to *Update*.
2. On the Profile Fields - Field Summary page, click the field that you want to modify.
This enables you to access the Profile Fields - Field Detail page where you must change the Status field to *Update*.
3. Make the change.

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

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

Adding a New Profile Field

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

To add a new profile field to an existing profile:

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

Registering a Profile

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

Note. *Map to Existing Field* field value types rely on an underlying prompt table for field values.

Choose Many field value types rely on a child table for field values.

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

Critical Information for System Administrators

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

See *Enterprise PeopleTools 8.48 PeopleBook: Application Designer*

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

Profile Field Type	PeopleTools Field Type	Notes
<i>Choose Many</i>	N/A	Separate child table is needed. No new fields are required for the profile record.
<i>Choose One</i>	Char (254)	
<i>Choose One with Rating</i>	Number (18,0)	Must be signed.
<i>Date</i>	Date	
<i>Decimal</i>	Number (18,4)	Must be signed.
<i>File</i>	Char (254)	
<i>Integer</i>	Number (18,0)	Must be signed.
<i>Map Field Choice to Prompt</i>	Char (x)	Map Field Choice to Prompt fields cannot be included in profile tables with any other type of field. It is recommended that you create a view for this data rather than a profile table. The field that is referenced determines the PeopleTools field type. See the section related to building views in the PeopleSoft Application Designer documentation.

Profile Field Type	PeopleTools Field Type	Notes
<i>Text</i>	Char (X)	X represents the desired field length as defined in the profile definition request .
<i>Text Block</i>	Long Character	
<i>Time</i>	Time	
<i>Yes/No</i>	Char (1)	

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

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

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

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

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

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

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

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

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

Pages Used to Register a Profile

Page Name	Object Name	Navigation	Usage
Profile	RA_PROFILE_DTL	Set Up CRM, Common Definitions, Profile Management, Profile Registration, Profiles	View the profiles that are registered.
Profile Registration - Profile Fields - Field Summary	RA_ATTRIBUTE_SUMM	<ul style="list-style-type: none"> Click a Profile Name link on the Profile page. Click the Field Summary link on the Profile Fields - Field Detail page. 	Enter or view summary information about profile fields.
Profile Registration - Profile Fields - Field Detail	RA_ATTRIBUTE_DTL	Click the Field Detail link on the Profile Fields - Field Summary page.	Enter or view detailed information about profile fields.

Viewing Registered Profiles

Access the Profiles page.

The screenshot shows the 'Profiles' page with a dropdown menu set to 'Individuals'. Below the dropdown is a table with columns: Profile Name, Created By, Rows per contact, Description, and Status. The table lists five profiles: People, Sales Leads, Demographics, CS-ADM Academic History, and CS-ADM Academic Interests.

Profile Name	Created By	Rows per contact	Description	Status
People	System	One row	Individuals:People Profile	Activated
Sales Leads	System	Many rows	Sales Leads - Individuals	Activated
Demographics	User	One row	Additional Demographic Information	Activated
CS-ADM Academic History	User	Many rows	CS-ADM Academic History	Requested
CS-ADM Academic Interests	User	Many rows	CS-ADM Academic Interests	Requested

Profiles page

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

Reviewing the Profile Request

Access the Profile Registration - Profile page.

Profile Registration

Save Refresh View All Personalize

Group Type Individuals **Profile Name** Privacy Options
Rows Per Contact One row **Status** Requested

Profile Profile Fields

Profile

Category Individuals ***Status** Requested
Profile Name Privacy Options [Transfer to Design Profile](#)
Description Privacy Options **Rows** One row
 Create Profile Automatically
 Create/Map Profile Manually
Record Name RD_PERSON
 Profile Can Be Updated

Modified 02/25/2004 3:21PM PST EBATZDOR

Profile Registration - Profile page

Status

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

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

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

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

Create Profile Automatically

Select to generate the profile record that is used to store the profile information automatically.

Create/Map profile Manually

Select to map the profile and the record where the profile information is stored manually.

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

Record Name

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

Mapping Field References

Access the Profile Registration - Profile Fields page.

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

Group Type		Individuals	Profile Name		Privacy Options
Rows Per Contact		One row	Status		Requested
Profile		Profile Fields			
Field Summary		Field Detail			
Profile Fields					
		Customize Find View All		First 1-4 of 4 Last	
Order	Name	Record Name	Field Name	Use Type	Field Status
1	Do Not Contact	RD_PERSON	DO_NOT_CONTACT	Choose One	In Design <input type="button" value="Delete"/>
2	Do Not Call	RD_PERSON	DO_NOT_CALL	Choose One	In Design <input type="button" value="Delete"/>
3	Do Not Email	RD_PERSON	DO_NOT_EMAIL	Choose One	In Design <input type="button" value="Delete"/>
4	Do Not Mail	RD_PERSON	DO_NOT_MAIL	Choose One	In Design <input type="button" value="Delete"/>

Profile Registration - Profile Fields page

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

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

Completing the Activation Process

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

Setting Up Profile Groups

This section discusses how to set up profile groups.

Pages Used to Set Up Profile Groups

Page Name	Object Name	Navigation	Usage
Define Profile Group	RA_PRFL_DEF_PG1	Set Up CRM, Common Definitions, Profile Management, Profile Groups, Define Profile Group	Define profile groups.
Define Profile Group - Add Profile Field	RA_PRFL_FLD_SEC	Click the Add Profile Field button on the Define Profile Group page.	Select profile fields to add to a profile group.
Assign Profile Group Display - Assign Profile Group Display	RA_CMPT_PRFL_PG	Set Up CRM, Common Definitions, Profile Management, Profile Groups, Assign Profile Group Display	Assign profile groups to a CDM component.
Optionally, assign Profile Group Display - Edit Condition	RA_CND_BLD_PG	 Click the Edit Condition button next to a profile group on the Assign Profile Group Display - Assign Profile Group Display page.	Specify the conditions under which the profile group fields appear on the More Info or Summary page or leave blank.

Defining Profile Groups

Access the Define Profile Group page.

Define Profile Group

Specify Profile Group Information

* **Group Name** * **Category**

Description

Column One Contents Find | View All First 1-2 of 2 Last

*Sequence	Profile Field Name	Display Label	
1	Individuals.Demographics.Current Student	<input type="text" value="Current Student"/>	
2	Individuals.Demographics.Number of children	<input type="text" value="Number of children"/>	

Column Two Contents Find | View All First 1-2 of 2 Last

*Sequence	Profile Field Name	Display Label	
2	Individuals.Demographics.Estimated Household Income	<input type="text" value="Estimated Household Incom"/>	
3	Individuals.Demographics.Number of Vehicles	<input type="text" value="Number of Vehicles"/>	

Define Profile Group - Define Profile Group page

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

You cannot add profile fields from the basic tables to profile groups.

Selecting Profile Fields

Access the Define Profile Group - Add Profile Field page.

Define Profile Group - Add Profile Field page

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

Assigning Profile Groups to CDM Components

Access the Assign Profile Group Display - Assign Profile Group Display page.

Assign Profile Group Display - Assign Profile Group Display page

Note. The fields in the Profile Groups for Summary Page region are available for the Company and Partner Company components only.



Click to add a profile group to the component.

Specifying Conditions

Access the Assign Profile Group Display - Edit Condition page.



Assign Profile Group Display - Edit Condition page

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

Switch to Advanced Mode Click to specify complex conditions.



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

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

See Also

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

Viewing and Updating Profile Data

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

Pages Used to Manage Profile Data

Page Name	Object Name	Navigation	Usage
Company - More Info, Partner Company - More Info, Person - More Info	RD_PROFILE	<ul style="list-style-type: none"> Customers CRM, Search Company, Company, More Info Customers CRM, Search Person, Person, More Info Partners CRM, Search Partner Company, Partner Company, More Info 	View and update profile information.
Company - Summary	RD_COMPANY_SUMMARY	Customers CRM, Search Company, Company, Summary	View profile information for a company.
Partner Company - Summary	RD_PARTNER_SUMMARY	Partners CRM, Search Partner Company, Partner Company, Summary	View profile information for a partner company.

Viewing and Updating Profile Information

Access the More Info page for a company, person, or partner company.

Company March 10 2004

Save 360-Degree View Return Add Company Personalize

Customer Cady Montgomery **Location** Colorado Springs, CO, USA
Contact John Turner

Tasks Call Reports Account Plans Notes Address Book Relationships **More Info**

DNB

DUNS Number

Name

Trade Style

CEO Name

CEO Title

Line of Business

Company - More Info page

CHAPTER 8

Working with the Relationship Viewer

This chapter provides an overview of the relationship viewer and discusses how to:

- Configure relationship views.
- Configure the relationship viewer.
- View and maintain relationships and roles.

Understanding the Relationship Viewer

This section discusses:

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

Purpose of the Relationship Viewer

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

Types of Relationships

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

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

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

You can monitor relevant peer-to-peer relationships instead of viewing the entire set of indirect relationships. To continue the softball example, if the relationship viewer is configured to show direct relationships and peer-to-peer relationships, the relationship view shows that each player has a direct relationship to the company and a peer-to-peer relationship to the other players on the team. If you do not establish the peer-to-peer relationship among team members, you can only view all indirect relationships between each employee of the company, and you cannot identify which employees have a team member relationship to each other.

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

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

Implicit and Explicit Relationships

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

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

Roles in the Relationship Viewer

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

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

PeopleSoft CRM Sample Relationship Views

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

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

Configuring Relationship Views

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

This section discusses how to configure relationship views.

Page Used to Configure Relationship Views

Page Name	Object Name	Navigation	Usage
Configure Relationship Views	BO_REL_VWCFG	Set Up CRM, Common Definitions, Customer, Configure Relationship Views, Configure Relationship Views	Create relationship views. The relationship view defines the tree that appears in a pane of the Relationship Viewer page.

Configuring Relationship Views

Access the Configure Relationship Views page.

Configure Relationship Views

Description

*Relationship View

*Description

*Maximum Rows

Enforce Top Node

Levels/Roles Find | View All First ◀ 2 of 2 ▶ Last

*Level + -

Sequence 2

Parent

*Role

Maximum Rows

Enforce Hierarchy

Folder Label

Role Type

Custom Name

None

Relationships Find | View All First ◀ 1 of 2 ▶ Last

Relationship Type + -

Search Criteria/Quick Create Template Find | View All First ◀ 1 of 2 ▶ Last

Market + -

*BO Search Criteria

*Quick Create Template

Configure Relationship Views page

Maximum Rows

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

Levels/Roles

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

Level	Enter the level at which this role and relationship pair appears in the tree. If you enter a level of <i>1</i> , the system removes the Relationships group box from the page and it hides the Parent field.
Parent	Select the parent node for which this role and relationship pair appears in the tree.
Role	Select the role for the node that appears in the tree.
Maximum Rows	Enter the maximum number of relationships to show for this node of the tree on the Relationship Viewer page for the primary focus business object.
Enforce Hierarchy	Select to have business objects that have the same role and are related in a parent-child relationship appear in the proper hierarchy when the user views <i>Multi Company</i> or <i>Customer Hierarchy</i> relationships.

Folder Label

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

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

Relationships

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

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

Search Criteria/Quick Create Template

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

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

Configuring the Relationship Viewer

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

This section discusses how to:

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

Pages Used to Configure the Relationship Viewer

Page Name	Object Name	Navigation	Usage
Role Type - Default Views	BO_REL_ROLEDFLT	Set Up CRM, Common Definitions, Customer, Role Type, Default Views	Specify the default views that appear in both sections of the Relationship Viewer page and specify the views that are to appear in the Select View list on the Relationship Viewer page. You can use a relationship view in more than one market.
Role Priority - Role Priorities	BO_REL_ROLEPRIORITY	Set Up CRM, Common Definitions, Customer, Role Priority, Role Priorities	Prioritize roles to determine the default relationship views that appear in the relationship viewer.

Defining Relationship Viewer Page Defaults

Access the Role Type - Default Views page.

Role Type		Default Views				
Relationship Viewer Page Defaults						
Role Type ID						
Role Company						
Page Defaults						
View All First 1-19 of 19 Last						
Market	Relationship View Name	Default Pane 1	Default Pane 2	Pane 1	Pane 2	All Panes
Comms	COMPANY HIERARCHY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Comms	CONTACT VIEW	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Comms	CUST_HIERARCHY	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Energy	COMPANY HIERARCHY	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Energy	CONTACT VIEW	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Energy	MULTI-COMPANY VIEW	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Energy	PARTNER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Energy	SITE VIEW	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fin Svcs	COMPANY HIERARCHY	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fin Svcs	CONTACT VIEW	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Fin Svcs	MULTI-COMPANY VIEW	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fin Svcs	PARTNER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Fin Svcs	SITE VIEW	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Role Type - Default Views page

- Relationship View Name** Select the relationship view that you want to associate with the role.
- Default Pane 1** Select the default view that appears in Pane 1 of the Relationship Viewer page.
- Default Pane 2** Select the default view that appears in Pane 2 of the Relationship Viewer page.
- Pane 1** Select the views that you want as selection criteria for Pane 1.
- Pane 2** Select the views that you want as selection criteria for Pane 2.
- All Panes** Select the views that you want as selection criteria in both Pane 1 and Pane 2.

Prioritizing Roles for the Relationship Viewer

Access the Role Priority - Role Priorities page.

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

Viewing and Maintaining Relationships and Roles

This section discusses how to:

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

Pages Used to View and Maintain Relationships and Roles

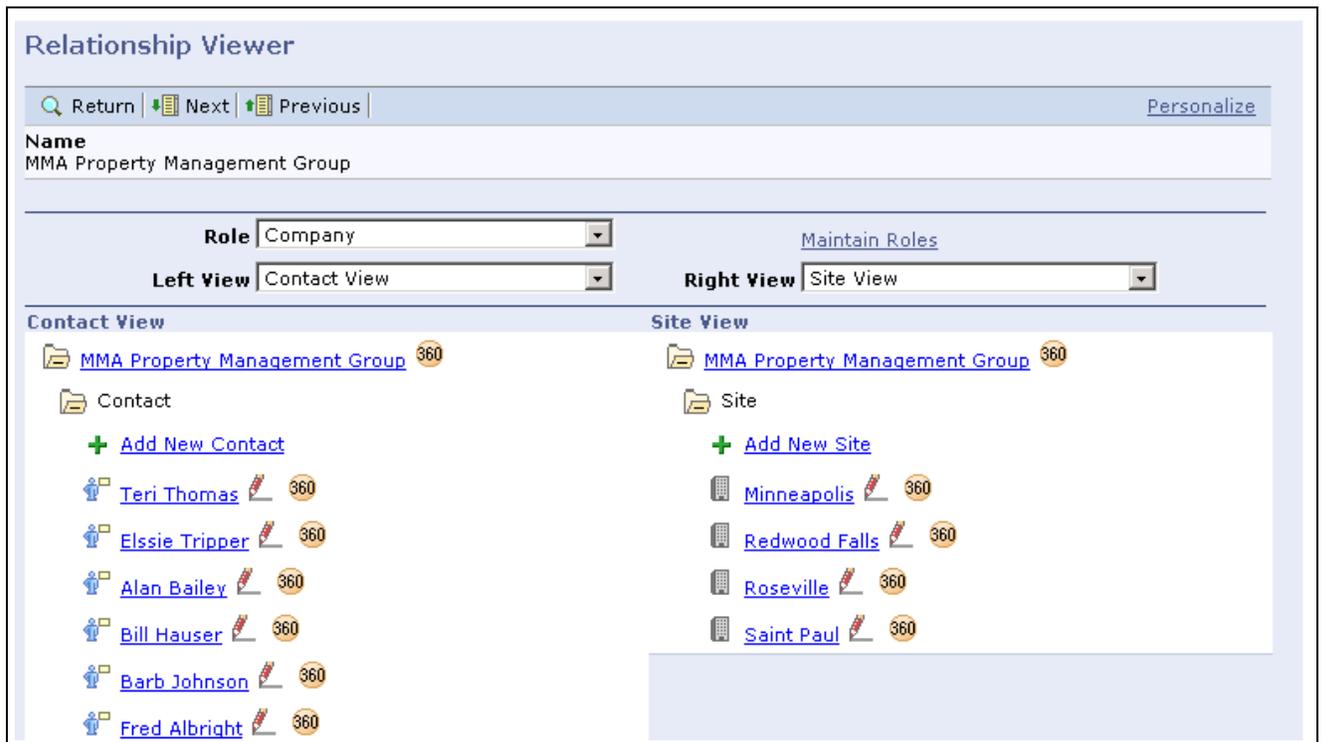
Note. The Relationship Viewer page and the business object Relationships pages are identical in appearance and use.

Page Name	Object Name	Navigation	Usage
Relationship Viewer	BO_REL_VIEW	Customers CRM, Relationship Viewer	View and maintain current relationships for a specified business object.
Company - Relationships	RD_COMPANY_REL	Customers CRM, Company, Relationships	View and maintain current relationships for a specified business object.
Consumer - Relationships	RD_PERSON_REL	Customers CRM, Consumer, Relationships	View and maintain current relationships for a specified business object.
Contact - Relationships	RD_PERSON_REL	Customers CRM, Contact, Relationships	View and maintain current relationships for a specified business object.
Site - Relationships	RD_SITE_REL_2	Customers CRM, Site, Relationships	View and maintain current relationships for a specified business object.
Business Object - Relationships	BO_REL	Customers CRM, Business Object, Relationships	View and maintain current relationships for a specified business object.
360-Degree View - Relationship Viewer	RB_TD_REL_VIEWER	Click the 360-Degree View from the main menu. Click the Relationship Viewer tab.	View and maintain current relationships for a specified business object.
Create New <relationship> of <object>	BO_REL_VIEW_3	<ul style="list-style-type: none"> • Click the Add New link on the view detail of the Relationship Viewer page. • Click the Add New link on the view detail of the Relationships page in the Company, Consumer, Site, Contact, or Business Object component. 	Add a new relationship.
Relationship Viewer - Update <relationship>	BO_REL_VIEW_2	 Click the pen edit button on the view detail of the Relationship Viewer page.	Update the relationship. You can modify the start date or end date for the relationship.

Page Name	Object Name	Navigation	Usage
Maintain Roles	MAINTAIN_ROLE_SEC	Click the Maintain Roles link on the Relationship Viewer page or a Relationships page for a component.	Maintain roles for a specified business object.
360-Degree View	RB_TD_AGENT_VIEW	 Click the 360-Degree button on the view detail of the Relationship Viewer page.	Access the 360-degree view of the specified business object. See <i>PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook</i> , “Using the 360-Degree View”.

Viewing and Maintaining Relationships

Access the Relationship Viewer page or the Relationships page for any business object.



Relationship Viewer page

Role

Select the role for which you want to view relationships.

Select View

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

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

See [Chapter 8, “Working with the Relationship Viewer,” Configuring Relationship Views, page 103.](#)

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

View Detail

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

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

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

See [Chapter 3, "Defining Control Values for Business Objects," Modifying and Adding Role Types, page 23](#).

Add New <relationship> Click to add a new relationship.

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

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

See [Chapter 8, "Working with the Relationship Viewer," Configuring Relationship Views, page 104](#).

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

See [Chapter 8, "Working with the Relationship Viewer," Viewing and Maintaining Relationships and Roles, page 107](#).



Click to update the relationship.



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

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

Viewing and Maintaining Roles

Access the Relationship Viewer - Maintain Roles page.

Relationship Viewer

Maintain Roles

MMA Property Management Group

Current Roles

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

Add or Reactivate Role Information

Role

Start Date

End Date

Relationship Viewer - Maintain Roles page

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

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

Add or Reactivate Role Information

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

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

Add or Reactivate Click this button after you select the role and the start and end date to add or reactivate the role that is for the specified business object.

PART 3

Data Management for Organization Business Objects

Chapter 9
Defining Company Business Objects

Chapter 10
Defining Site Business Objects

CHAPTER 9

Defining Company Business Objects

This chapter provides an overview of the Company component and discusses how to:

- Define company information.
- Define company sites.
- Define company contacts.
- Model corporate hierarchy.

Understanding the Company Component

This section discusses:

- Company information.
- Partner companies.
- Markets.

Company Information

A company is an organization that purchases, leases, or contracts for product or services. In PeopleSoft Customer Relationship Management (PeopleSoft CRM), companies are represented as business objects with an Organization business object type and a Company role type. A record for each company is created in the Company table (RD_COMPANY). Because companies participate in business transactions, a record for the company is also created in the Business Contact table (BC), which enables you to define records for sold-to, bill-to, and ship-to information for the company.

Each company can have one or more addresses that can apply to the company, its sites, or its contacts.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” page 47](#).

Sites

For each company, you can associate sites, the geographic locations of the company where services are performed, or products shipped or installed. Site records are maintained in the Site table (RD_SITE). When you associate a site with a company, a record is inserted in the Business Object Relationship table (BO_REL) to capture the relationship between the site and the company.

Contacts

You can also define the company's contacts: the people who participate in business transactions on behalf of the company. When you define company contacts in PeopleSoft CRM, you can enter contact information for the contact that is specific to his or her role as a contact of the company. Records for contacts are maintained in the Person table (RD_PERSON). When you associate a person with a company or one of the company's sites, a record is created in the Business Object Relationship table to capture the contact relationship between the person and the company.

Note. If you add a contact who is a company employee whose worker information is *secured*, the contact's home phone number, home email address, and home address do not appear. This information is visible in a HelpDesk case when searching for a worker or if the Phone Number or Email Address field is selected in the display template, even if the user does not have a secured role.

Attributes

You can configure the Company component to store installation-specific attributes. Because this is a configuration, attributes that you add are not supported by PeopleSoft CRM. If you choose to configure additional attributes, you can make them visible on the Company component by using permission lists.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up Security and User Preferences," Setting System-Wide Security Options.

Integrations

You can also create and maintain company records in PeopleSoft Supply Chain Management or a third-party system and synchronize the company data with PeopleSoft CRM by implementing the following enterprise integration points (EIPs): the Customer EIP, Customer_Company EIP, Customer_Consumer EIP, Customer_Site, and Customer_Contact EIP.

Partner Companies

You can designate a company as a partner company. Partner companies in PeopleSoft CRM are indirect sales channels that sell, fulfill, and distribute goods and services to customers through indirect sales channels.

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

Markets

Pages that contain information about a person's financial accounts and bill payees appear only for installations that have licensed PeopleSoft Bill Presentment and Account Management or PeopleSoft Banking Transactions. This visibility is controlled by the market that you specify on the User Preferences page.

See Also

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

PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook, "PeopleSoft Enterprise Bill Presentment and Account Management Preface"

PeopleSoft Enterprise Banking Transactions 9 PeopleBook, "PeopleSoft Enterprise Banking Transactions 9 Preface"

PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook, "PeopleSoft Enterprise CRM Industry Application Fundamentals Preface"

Defining Company Information

To define company information, use the Company (RD_COMPANY_2) component.

This section discusses how to:

- Access companies
- Maintain general company information
- Manage company account teams
- Manage sales team tasks
- View call reports
- View account plans
- Add notes
- Manage company contact information
- Maintain company relationships
- Maintain company profile data
- Maintain tax exempt certificate information

Pages Used to Define Company Information

Page Name	Object Name	Navigation	Usage
Company Search	RD_COMPANY_GSRCH	Customers CRM, Search Company	Access an existing company.
Company - Summary	RD_COMPANY_SUMMARY	Customers CRM, Search Company, Company - Summary: Summary	View summary information about the company.
Company - Details	RD_COMPANY_DETAILS	Customers CRM, Search Company, Company - Summary: Details	Maintain general information about the company.
Company - Purchasing Options	RD_COMPANY_CUST_OP	Customers CRM, Search Company, Company - Summary: Purchasing Info	Maintain the company's purchasing information.
Company - Tax Exempt Certificate	RD_TAX_EXEMPT_COMP	Customers CRM, Search Company, Company - Summary: Tax Exempt Certificate	Maintain the company's tax exempt information.
Company - Account Team	RD_ACCOUNT_TEAM	Customers CRM, Search Company, Company - Account Team	Manage the account team that is assigned to the company.
Company - Tasks	RD_TASK_LIST	Customers CRM, Search Company, Company - Tasks	Manage sales team tasks for a company.

Page Name	Object Name	Navigation	Usage
Company - Call Reports	RD_CALLRPT_LST_TXN	Customers CRM, Search Company, Company - Call Reports	View a list of call reports for which the company contacts are named as participants.
Company - Billing Accounts	RBT_COMACT_LIST	Customers CRM, Search Company, Company - Billing Accounts	View a list of billing accounts for the company.
Company - Account Plans	RD_ACCOUNT_PLAN	Customers CRM, Search Company, Company - Plans	View the account plans for the company.
Company - Notes	RD_COMPANY_NOTE_2	Customers CRM, Search Company, Company - Notes	Maintain notes and attachments for the company.
Company - Contact Info	RD_COMP_ADDR_BOOK	Customers CRM, Search Company, Company - Contact Info	Manage company contacts, addresses, and sites.
Company - Relationships	RD_COMPANY_REL	Customers CRM, Search Company, Company - Relationships	Maintain company relationship information.
Company - More Info	RD_PROFILE	Customers CRM, Search Company, Company - More Info	Maintain company profile data.
Company - Attributes	RB_ATTR_RUN_COMP	Customers CRM, Search Company, Company - Attributes	Maintain company attributes.

Accessing Companies

Access the Company Search page.

The appearance, behavior, and personalization options for this page are controlled by the search definition for the Company component.

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

Maintaining General Company Information

Access the Company - Details page.

Company

[Save](#) | [360 360-Degree View](#) | [Search](#) | [Previous](#) | [Add Company](#) | [Personalize](#)

Customer MMA Property Management Group **Location** Circle Pines, MN, USA
Contact Teri Thomas **Job Title** Management Associate
Phone Business: 651/785-2546 **Email** tthomas@mma.com

Summary | [Account Team](#) | [Tasks](#) | [Call Reports](#) | [Billing Accounts](#) | [Plans](#) | [Notes](#) | [D](#)

[Summary](#) | [Details](#) | [Purchasing Info](#) | [Tax Exempt Certificate](#)

▼ **Company Details**

*Company MMA Property Management Group More Names	Taxpayer ID <input type="text"/>
Country United States <input type="text"/>	Location Type Division <input type="text"/>
Incorporated In <input type="text"/>	Employee Total <input type="text"/>
DUNS Number <input type="text"/>	Parent Company <input type="text"/>
Ownership <input type="text"/>	Year Started <input type="text"/>
Legal Structure <input type="text"/>	Year Incorporated <input type="text"/>
Customer Type User 1 <input type="text"/>	*SetID CRM01 <input type="text"/>
Business <input type="text"/>	*Company ID 301 <input type="text"/>
Website URL <input type="text"/> (example: http://www.peoplesoft.com)	Privacy <input type="checkbox"/> Do Not Contact
<input type="checkbox"/> Minority Owned	<input type="checkbox"/> Do Not Email
Partner No Add Partner Data	<input type="checkbox"/> Do Not Call
Corporate Hierarchy	<input type="checkbox"/> Do Not Mail

Company - Details page (1 of 2)

Contact Info Entries

*Description [More...](#)

Phone			
*Type	Country Code	Number	Ext/PIN
Business	<input type="text"/>	800/988-5644	<input type="text"/>
Pager	<input type="text"/>	800/987-4563	<input type="text"/>
FAX	<input type="text"/>	<input type="text"/>	<input type="text"/>
Pager	<input type="text"/>	<input type="text"/>	<input type="text"/>

Email	
*Type	Email Address
Business	MMA@mma.com
Other	<input type="text"/>

Address

[Look up Address](#)

*Type

*Country

Address 1

Address 2

Address 3

City

County

State

Postal

[Set Display](#)

Status and Currency Data

*Customer Status <input type="text" value="Active"/>	*Currency Code <input type="text" value="USD"/>
Status Date <input type="text" value="11/13/2001"/>	*Currency Type <input type="text" value="CRRNT"/>
Customer Since <input type="text" value="01/01/2000"/>	Credit Rating Value <input type="text"/>
Segment Code <input type="text"/>	Assessment <input type="text" value="Gold"/>

Financial Details

Industry Classifications

Purchasing Options

Sold To Customer This company can make purchases.

Bill To Customer This company can receive bills.

Ship To Customer This company can receive shipments.

Company - Details page (2 of 2)

Company Details

Company Name

Enter the company name. By default, the name that you enter here is the primary name for the company. Click the More Names link to add additional names or designate another name as primary.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” Updating Name Information, page 50.](#)

Customer Type

Select a customer category for use in reports. You can modify the translate values, *User 1* to *User 4*, to reflect categories that make sense for customer tracking. For example, *User 1* might represent manufacturing customers, *User 2* might represent retail customers, and so on.

Business

Enter the customer’s business type.

Location Type

Select a description of the company location. Values are *Branch*, *Division*, *Headquarters*, *Single Location*, and *Subsidiary*.

Parent Company

Enter the name of the parent company. You must establish parent companies in the system before associating them with subsidiaries. When you save the

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component, the system automatically creates a relationship between the two company business objects.



Click to transfer to the website that is specified in the Website URL field.

Add Partner Data and Edit Partner Data

Click the Add Partner Data link to add the Partner role to a company. If the company already has the Partner role, the link text changes to Edit Partner Data.

You transfer to the Partner Company component on which you can view or update partner information.

Corporate Hierarchy

Click to access a hierarchical tree view of selected relationships that are specified for the company in the Corporate Hierarchy component.

Privacy

Select one of these options to indicate the channels for which the company requests stoppage of all unsolicited communications from the business.

Contact Info

Enter contact information for the company.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Contact Information, page 56.](#)

Status and Currency Data

Customer Status

Select *Active* or *Inactive*.

Customer Since

Enter the date that the company becomes a customer of your business.

Note. If you integrate with PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management, you cannot modify the customer status information and the Customer Since date in PeopleSoft CRM.

Currency Code

Select the code that specifies the currency that you use for a monetary transaction with this company.

Currency Type

Select the exchange rate type that is used to calculate monetary transaction amounts in alternate currencies.

Credit Rating Value

Enter the company’s credit rating, if it’s known.

Segment Code

Select the company’s business segment for marketing purposes.

Assessment

Displays the customer’s key performance indicator value that is determined by Performance Management.

See [Chapter 2, “Understanding Business Object Relationship Model Components,” Customers and Business Contacts, page 9.](#)

Purchasing Options

Indicate which purchasing tasks are valid for the company.

See [Chapter 5, “Defining Purchasing Options for Companies, Consumers, and Sites,” page 69.](#)

Sold To Customer, Bill To Customer, and Ship To Customer Select if the company can make purchases, receive invoices, or receive shipments.

Managing Company Account Teams

Access the Company - Account Team page.

See *PeopleSoft Enterprise Strategic Account Planning 9 PeopleBook*.

Managing Sales Team Tasks

Access the Company - Tasks page.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Tasks”.

Viewing Call Reports

Access the Company - Call Reports page.

Note. The system only displays call reports that have information associated with the displayed company.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Call Reports”.

Viewing Account Plans

Access the Company - Plans page.

See *PeopleSoft Enterprise Strategic Account Planning 9 PeopleBook*.

Adding Notes

Access the Company - Notes page.

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

Managing Company Contact Information

Access the Company - Contact Info page.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Contact Information for Business Objects, page 53](#).

Maintaining Company Relationships

Access the Company - Relationships page.

See [Chapter 8, “Working with the Relationship Viewer,” page 101](#).

Maintaining Company Profile Data

Access the Company - More Info page.

See [Chapter 7, “Working with Business Object Profiles,” page 81.](#)

Maintaining Tax Exempt Certificate Information

Access the Company - Tax Exempt Certificate page.

Company

Save 360 360-Degree View Search Previous Next Add Company >> Personalize

Customer Advanced Consulting **Location** Quincy, MA, USA
Contact Paula Smith **Job Title**
Phone 800/888-9090 **Email** psmith@xxx.com

Summary Account Team Tasks Call Reports Billing Accounts Plans Notes

Summary Details Purchasing Info **Tax Exempt Certificate**

Tax Exempt Certificate Find View All First 1 of 1 Last

*Exemption Certificate 12-22-333-44444 + -

Issuing Authority Federal Government Authority Type Federal

Certificate Details Customize Find First 1 of 1 Last

*Effective Date	Status as of Effective Date	Issued Date	Expiration Date	Tax Exempt Category	Exemption License	Long Description
01/01/2004	Active	01/01/2004	12/31/2005	Single Purchase	<input checked="" type="checkbox"/>	Good for any

Add Certificate Data

Company - Tax Exempt Certificate page

Exemption Certificate and Issuing Authority

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

Authority Type

Enter the authority type for the associated tax exempt certificate. Values are *Europe*, *Federal*, *Local*, *Other*, *State*, and *Transport*.

Status as of Effective Date

Enter the status for the certificate. Values are *Active* and *Inactive*.

Tax Exempt Category

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

- *Blanket*
Exemption category exists for all purchases of this type.
- *Single Purchase*
Exemption category exists for the specified purchase only.
- *Other*
A user-defined exemption category.

Exemption License

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

Add Certificate Data

Select the Add Certificate Data button to add tax additional certificates.

Defining Company Sites

This section lists the pages used to define company sites.

See Also

[Chapter 4, “Defining Name and Address Information for Business Objects,” Defining Customer Sites, page 65](#)

Pages Used to Define Company Sites

Page Name	Object Name	Navigation	Usage
Company Search	RD_COMPANY_GSRCH	Customers CRM, Search Company	Search for existing companies.
Company - Site	RD_COMPANY_SITE_2	Customers CRM, Search Company, Company - Contact Info Click the Sites link.	View a list of company sites and add new sites for the company.

Defining Company Contacts

This section lists the pages used to define a company's contacts.

See Also

[Chapter 4, “Defining Name and Address Information for Business Objects,” Defining Customer Contacts, page 60](#)

Pages Used to Define Company Contacts

Page Name	Object Name	Navigation	Usage
Company - Contact Info: Contacts	RD_COMPANY_CNTCT_2	Customers CRM, Search Company, Company, Contact Info Select the Contacts link.	Maintain the list of contacts who represent the company in business transactions.
Create Contact of <company>	RBQ_QCREATE	On the Company - Contact Info: Contacts page, click the Add Contact button.	Add a contact to a company.
Modify <contact>	RBQ_QCREATE	On the Company - Contact Info: Contacts page, click the Edit button for any listed contact.	Maintain information for an existing company contact, including purchasing options and contact information.

Modeling Corporate Hierarchy

This section provides an overview of corporate hierarchy and discusses how to:

- View and modify participation percentages.
- Select the role that appears.

Understanding Corporate Hierarchy

The Corporate Hierarchy component enables the user to create and maintain Hierarchical Groupings, including the ability to capture the percent ownership of each child to its parent.

The Corporate Hierarchy link is on the Company Summary and Company Details pages of the Company component. The Corporate Hierarchy link is only visible when a Company participates in Hierarchical Relationship(s). The following Relationship Types are currently considered hierarchical:

Relationship Type ID	Description
4	Company / Site
17	Consumer / Site
18	Parent Company / Company
94	Manager / Reports to
333	Board of Directors
20008	Person / Son/Daughter
20010	Parent / Child
20015	School / Student
20015	Personal Banker / Client

Understanding Corporate Hierarchy Participation Percentages

The Corporate Hierarchy component enables you to view the list of sites or contacts that compose a customer company and assign a participation percentage to each. For example, if a customer company has three contacts, *Larry Hill*, *Stu Marx*, and *Sandra Thomas*, you might assign participation percents as follows:

Contact	Percent
Larry Hill	40
Stu Marx	20
Sandra Thomas	40

You can view and assign participation only to the first dependent level in the hierarchy: to the sites and contacts that are directly associated with a company.

A parent may have multiple children, and each child is some percentage of its parent. The sum of all percentages for a given parent shall be less than or equal to 100%. This percentage is called ownership.

Pages Used to Model Corporate Hierarchy

Page Name	Object Name	Navigation	Usage
Corporate Hierarchy	RB_HIER_GRP_BUILD	<ul style="list-style-type: none"> Customers CRM, Corporate Hierarchy Customers CRM, Search Company Click the Corporate Hierarchy link on the Summary page.	View and modify the participation percentage of objects in the corporate hierarchy. Note. The Corporate Hierarchy link appears only if a hierarchy exists.
Corporate Hierarchy: Extract Hierarchy	RB_HIER_GRP_ROLES	Click the Extract Hierarchy link on the Corporate Hierarchy page.	Select roles for the hierarchy.

Viewing and Modifying Participation Percentages

Access the Corporate Hierarchy page.

Corporate Hierarchy

Business Object ID 103
Business Object Name Sparkle Clean Laundromats

First | Previous | Next | Last | Left | Right

- Company - Sparkle Clean Laundromats
 - Site (10%) - Arkansas City
 - Site (30%) - Benton
 - Site (20%) - Jacksonville
 - Site (25%) - Little Rock
 - Site (5%) - Mountain View

Description

Role Type Company
Node Name Sparkle Clean Laundromats

Company Composition

Role	Name	Participation Percentage
Site	Arkansas City	10.00
Site	Benton	30.00
Site	Jacksonville	20.00
Site	Little Rock	25.00
Site	Mountain View	5.00

Total Participation Percentage 90.00

[Extract Hierarchy](#)

Corporate Hierarchy page

Participation Percentage Enter the percentage of activity that each business unit contributes.

Extract Hierarchy Click to modify the roles that appear.

Selecting the Role that Appears

Access the Corporate Hierarchy: Extract Hierarchy page.



Corporate Hierarchy

*Role Category ID Save as default Search Group

Roles

	Description
<input checked="" type="checkbox"/>	Company
<input checked="" type="checkbox"/>	Contact
<input checked="" type="checkbox"/>	Individual Consumer

[Cancel](#)

Corporate Hierarchy: Extract Hierarchy page

Role Category ID	Select from various types of hierarchies. This field controls the roles from which you can select.
Save as default Search Group	Select to save the role selections as the default.
Roles	Select roles to appear in the hierarchy.
Extract Hierarchy	Click to return to the parent Corporate Hierarchy page and view the hierarchy you selected.

CHAPTER 10

Defining Site Business Objects

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

- Set up site types.
- Maintain general site information.
- Maintain site contacts.
- Define site relationships.

Understanding Sites

Sites in CRM are:

- Customers that are represented by contacts.
- Always associated with a company or a consumer business object.

Note. Sites can be used independently for the energy industry.

- Places where products are shipped or installed.
- Places where services are performed.

In the customer data model, sites are represented as organization type business objects with a role type of site. A record for each customer site is created in the Site table (RD_SITE), and a record for the association between a site and a company or consumer is inserted in the Business Object Relationship table (BO_REL). Because the site that is associated with a customer can participate in business transactions, a record for the site is also created in the Business Contact table (BC), which enables you to specify sold-to, bill-to, and ship-to purchasing options for the site.

Site contacts are Person business objects and are also contacts of the company or consumer that is associated with the site. When you associate a person with a customer site, the person is assigned a role type of contact for both the site and the customer with whom the site is associated. Two records are inserted in the Business Object Relationship table (BO_REL): one record to capture the relationship between the person and the site and one record to capture the relationship between the person and the customer who is associated with the site.

You can publish customer site information to PeopleSoft Supply Chain Management (PeopleSoft SCM) by using the following Customer_Site EIP. However, because PeopleSoft Supply Chain Management does not have a site concept, site records are created as customer records in the PeopleSoft Supply Chain Management system. Customer records in PeopleSoft SCM are created only for sites that are flagged as either sold-to or bill-to sites in CRM.

See Also

[Chapter 2, “Understanding Business Object Relationship Model Components,” Customers and Business Contacts, page 9](#)

[Chapter 11, “Defining Person Business Objects,” Defining Information for Business Contacts, page 153](#)

[Chapter 4, “Defining Name and Address Information for Business Objects,” page 47](#)

[Chapter 17, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” page 299](#)

PeopleSoft Enterprise Components for CRM 9 PeopleBook

Setting Up Site Types

To set up site types, use the Site Type (RD_SITE_TYPE) component.

This section discusses how to set up site types.

Page Used to Set Up Site Types

Page Name	Object Name	Navigation	Usage
Site Type	RD_SITE_TYPE	Set Up CRM, Common Definitions, Customer, Site Type	Define codes that you use to categorize sites. Site type IDs must be unique for the specified set ID.

Maintaining General Site Information

To maintain general site information, use the Site (RD_SITE_2) component.

This section discusses how to:

- Maintain primary site information.
- Maintain site names.
- Maintain site purchasing options.
- Maintain site contact information.
- Add notes and attachments.

Pages Used to Maintain General Site Information

Page Name	Object Name	Navigation	Usage
Site Search	RD_SITE_GSRCH	Customers CRM, Search Site	Search for existing sites.
Site - Site: Primary	RD_SITE_MAIN_2	<ul style="list-style-type: none"> Customers CRM, Add Site Customers CRM, Search Site, Site - Site: Primary 	Maintain primary site information
Site - Site: Name	RD_SITE_NAME_PG	Customers CRM, Search Site, Site - Site: Name	Maintain site names. Designate a primary site name.
Site - Site: Purchasing Info (purchasing information)	RD_SITE_CUST_OP_2	<p>Access the Site - Site: Primary page.</p> <p>Click the Purchasing Info (purchasing information) link.</p>	Maintain purchasing information for the site.
Site - Site: Tax Exempt Certificate	RD_TAX_EXEMPT_SITE	<p>Access the Site - Site: Primary page.</p> <p>Click the Tax Exempt Certificate link.</p>	Maintain tax exempt information for the site.
Site - Account Team	RD_ACCOUNT_TEAM	<ul style="list-style-type: none"> Customers CRM, Search Site, Account Team Customers CRM, Add Site, Account Team 	View and modify the account team that is assigned to a site.
Site - Contact Info	ABE_LIST	<ul style="list-style-type: none"> Customers CRM, Search Site, Contact Info Customers CRM, Add Site, Contact Info 	Maintain contact information for a site, including addresses, phone numbers, and email information.
Site - Contacts	RD_SITE_CNTCT_2	<p>Access the Contact Info page for a site.</p> <p>Click the Contacts link.</p>	Maintain site contacts.
Site - Account Plan	RD_ACCOUNT_PLAN	<ul style="list-style-type: none"> Customers CRM, Search Site, Account Plan Customers CRM, Add Site, Account Plan 	View and modify the account plan for a site.
Site - Notes	RD_SITE_NOTE_2	<p>Customers CRM, Add Site, Notes</p> <p>Customers CRM, Search Site, Notes</p>	Add notes and attachments for the specified site.
Site - Attributes	RB_ATTR_RUN_SITE	<p>Customers CRM, Add Site, Attributes</p> <p>Customers CRM, Search Site, Attributes</p>	View attributes for the site.

Maintaining Primary Site Information

Access the Site - Site: Primary page.

The screenshot displays the 'Site - Site: Primary' page. At the top, there are navigation buttons: Save, 360-Degree View, Search, Next, Add New, Add to My Contacts, and Personalize. The main header shows 'Site Name Minneapolis' and 'Site ID 478', with 'SetID CRM01' below. A breadcrumb trail includes 'Site', 'Account Team', 'Installed Product and Service', 'Plans', 'Notes', and 'Contact Info'. Below this is a sub-menu with 'Primary', 'Name', 'Purchasing Info', and 'Tax Exempt Certificate'. The 'Profile Information' section contains a 'Customer' field with 'MMA Property Management Group', a 'Site Restrictions' text area, and a 'Site Type' dropdown set to 'Branch'. There is also a '*SetID' field with 'CRM01' and a 'Privacy' section with checkboxes for 'Do Not Contact', 'Do Not Email', 'Do Not Call', and 'Do Not Mail'. The 'Purchasing Options' section has checkboxes for 'Sold To Customer' (checked), 'Bill To Customer', and 'Ship To Customer' (checked). The 'Status and Currency Data' section includes fields for '*Customer Status' (Active), 'Status Date' (04/05/2001), 'Customer Since' (04/05/2001), 'Segment Code' (RTL), '*Currency' (USD), '*Currency Type' (CRRNT), 'Credit Rating Value', and 'Assessment' (Gold, represented by five stars).

Site -Site: Primary page

Note. This example page does not show the page regions for entering contact information. Those page regions function similarly to the ones that appear on the Company component.

Name

This page region appears when you add a site. When you subsequently access the site, you must click the Name link to edit site name information.

See Chapter 4, “Defining Name and Address Information for Business Objects,” page 47.

Profile Information

The fields in this page region provide basic information about the site.

Customer Displays the primary name of the customer with whom the site is associated. Click the transfer button to access the customer’s primary information.

Site Type Select the site type. Site types are established on the Site Types page.

Site Restrictions Enter comments about any restrictions for the site.

Privacy Select the appropriate privacy options for the site.

Purchasing Options

Select the purchasing options to enable for this site. Use the Purchasing Info page to enter detail about the selected purchasing options.

See [Chapter 5, “Defining Purchasing Options for Companies, Consumers, and Sites,” Defining Purchasing Options for Customers, page 70.](#)

Status and Currency Data

Customer Status Select *Active* or *Inactive*.

Customer Since Enter the date that the site became a customer for your business.

Note. If you are integrated with PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management, you cannot modify the customer status information and the customer since date in CRM.

Currency Code Select the code that specifies the currency that you use for a monetary transaction with this site.

Currency Type Select the exchange rate type that you use to calculate monetary transaction amounts in alternate currencies.

Segment Code Select the site’s business segment for marketing purposes.

Assessment Displays the key performance indicator value as determined by PeopleSoft Enterprise Performance Management.

Contact Info

The primary site address, phone, and email information appear in this page region. To view and edit detail information or additional addresses, click the More link or access the Address Book page.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Contact Information for Business Objects, page 53.](#)

Maintaining Site Names

Access the Site - Site: Name page.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” page 47.](#)

Maintaining Site Purchasing Options

Access the Site - Site: Purchasing Info (purchasing information) page.

See [Chapter 5, “Defining Purchasing Options for Companies, Consumers, and Sites,” Defining Purchasing Options for Customers, page 70.](#)

Maintaining Site Tax Exempt Certificate Information

Access the Site - Site: Tax Exempt Certificate page.

See [Chapter 9, “Defining Company Business Objects,” page 115.](#)

Maintaining Site Contact Information

Access the Site - Contact Info page.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Contact Information for Business Objects, page 53.](#)

Adding Notes and Attachments

Access the Site - Notes page.

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

Maintaining Site Contacts

This section discusses how to maintain site contacts.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” Defining Customer Contacts, page 60.](#)

Pages Used to Define Site Contacts

Page Name	Object Name	Navigation	Usage
Site - Contacts	RD_SITE_CNTCT_2	<ul style="list-style-type: none"> Customers CRM, Add Site, Site, Address Book Click the Contacts link. Customers CRM, Search Site, Site, Address Book Click the Contacts link. 	Maintain site contacts.
Add Contact	RD_REP_ADD_SRCH	<p>Access the Contacts page for a site.</p> <p>Click the Add Contact button.</p>	Add a contact of a site.
Maintain Contact	RD_REP_MAINTAIN	<p>Access the Contact Summary page for a site.</p> <p>Click the Edit button next to a listed contact.</p>	Maintain purchasing options and contact information entries for a contact of a company, consumer, partner company, or site.

Defining Site Relationships

Access the Site - Relationships page.

See [Chapter 8, “Working with the Relationship Viewer,” page 101](#).

Viewing Installed Products and Services for a Site

This section discusses how to view installed products and services for a site.

Pages Used to View Installed Products and Services for a Site

Page Name	Object Name	Navigation	Usage
Site - Installed Products	RD_SITE_INSTPROD	<ul style="list-style-type: none"> Customers CRM, Add Site, Site Select the Installed Products and Services tab. Customers CRM, Search Site, Site Select the Installed Products and Services tab. 	<p>View installed products for a site.</p> <p>Note. A site can have either the Installed Products or the Installed Services tab, but not both.</p>

See Also

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

PART 4

Data Management for Individual Business Objects

Chapter 11
Defining Person Business Objects

Chapter 12
Defining Workers

CHAPTER 11

Defining Person Business Objects

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

- Configure the Person component.
- Define person information.
- Define business contact information.
- Define consumer information.
- Define person of interest information.

Understanding Persons

This section discusses:

- Sources of person information.
- Persons.
- Consumers and contacts.
- Workers.
- Persons of interest.

Sources of Person Information

A person in PeopleSoft CRM is created in two ways: either by data entry within a CRM component or by integration with a HRMS system. To avoid unnecessary data redundancy and to maintain data integrity, person data often originates in the HRMS system and is imported into CRM using enterprise integration points (EIPs) to automatically synchronize data updates between systems. These EIPs are available for person data: CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and WORKER.

See Also

[Chapter 17, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” page 299](#)

Persons

A person in CRM has one or more of these roles: contact, consumer, worker, or person of interest. Persons with these roles are represented as business objects of the Individual type. CRM stores these business objects in the Person table (RD_PERSON).

Common information is stored for the person and additional information is stored for each specific role that the person has. You can configure the role-specific pages that appear when you initially access the Person component. The contact role pages appear by default. You can add or edit information for other roles that apply to the same person by clicking the appropriate link on the Summary page of the Person component. For example, the Edit Worker Information link enables you to edit information that pertains to the person in the Worker role.

Common Person Information

This information is available for all person roles:

- Name.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” Understanding Name and Address Information in CRM, page 47.](#)

- Contact information.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” Contact Information on CRM Components, page 49.](#)

- User-defined fields.

User-defined fields provide the flexibility for you to define and enter additional person information that is not provided when you receive the product.

- Details information.

This information identifies details about a person, such as a driver’s license number, preferred contact methods, and privacy flags.

- User profiles.

User profiles include the person’s user IDs, roles, and system permissions.

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

- Contact Info.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Contact Information for Business Objects, page 53.](#)

- Notes.

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

- More information.

See [Chapter 7, “Working with Business Object Profiles,” page 81.](#)

Markets

Pages that contain information about a person’s financial accounts and bill payees appear only for installations that have licensed PeopleSoft Enterprise CRM Bill Presentment and Account Management or PeopleSoft Enterprise CRM Banking Transactions. This visibility is controlled by the market that you specify on the User Preferences page.

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

Attributes

You can configure the Person component to store installation-specific attributes. Because this is a configuration, attributes that you add are not supported by CRM. If you choose to configure additional attributes, you can make them visible on the Person component by using the Configure Person Component page.

See [Chapter 11, “Defining Person Business Objects,” Configuring the Person Component, page 143](#).

See Also

[Chapter 2, “Understanding Business Object Relationship Model Components,” page 7](#)

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

PeopleSoft Enterprise Banking Transactions 9 PeopleBook, “PeopleSoft Enterprise Banking Transactions 9 Preface”

Consumers and Contacts

Much of the information that appears in the Person component for consumers and contacts is similar. Both consumers and contacts perform the same activities: purchasing, leasing, or contracting for products or services. The difference is that consumers are customers and act on their own behalf, whereas contacts act on behalf of a customer or customer site.

In CRM, consumers are represented as person business objects with a business object type of Individual and a role type of Individual Consumer. Consumer records are maintained in the Person table. Because consumers participate in business transactions, a record for each consumer is also created in the Business Contact (BC) table, which enables you to define records for sold-to, bill-to, and ship-to information for the consumer.

Contacts are represented as business objects with a business object type of Individual and a role type of Contact. When a person is added to the system as a contact, a record for the person is inserted in the Person table. When the person is associated with a company, consumer, or site, a record is inserted in the Business Object Relationship (BO_REL) table to capture the relationship between the person and the company, consumer, or site. In addition to maintaining contact information for the Contact role, you can also maintain a separate set of contact information for a particular relationship for a contact (such as postal and email addresses and telephone and pager numbers) for each company, consumer, and site relationship. This information is used to contact the person when you are performing the contact role for a specific customer or site.

Contact and Consumer Information

This information is available for both consumers and contacts:

- National ID.

See [Chapter 3, “Defining Control Values for Business Objects,” Defining National ID Types, page 38](#).

- Credit cards.
- Tasks.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Tasks”.

- Call reports.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Call Reports,” Working with Call Reports.

- Relationships.

See [Chapter 8, “Working with the Relationship Viewer,” page 101](#).

Consumer-Specific Information

This information is available for consumers only:

- Purchasing options.

See [Chapter 5, “Defining Purchasing Options for Companies, Consumers, and Sites,” page 69](#).

- Status and currency data.

See [Chapter 2, “Understanding Business Object Relationship Model Components,” Customers and Business Contacts, page 9](#).

- Tax exempt certificates.
- Account team and plans.

See *PeopleSoft Enterprise Sales 9 PeopleBook*, “Working with Customer Accounts,” Managing Accounts.

- Contacts.

You can associate contacts with a consumer. When you associate a contact with a consumer or one of the consumer’s sites, a record is created in the Business Object Relationship table to capture the contact relationship between the contact and the consumer.

- Sites.

Sites are the geographic locations where services are performed or products are sent. Site records are maintained in the Site (RD_SITE) table. When you associate a site with a consumer, a record is inserted in the Business Object Relationship table to capture the relationship between the site and the consumer.

- Employment history and verification.

Contact-Specific Information

The Customers page is available only for persons with the contact role only.

Workers

A worker is any person who performs work for your organization, including employees and contractors. Worker information is used by the Support, HelpDesk, and Field Service applications and includes job detail and information that is used to manage worker assignment on service orders.

See Also

[Chapter 12, “Defining Workers,” page 157](#)

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “PeopleSoft Enterprise CRM Call Center Applications Preface”

Persons of Interest

A person of interest (POI) does not fit into either the contact, consumer, or worker categories, but is someone for whom your organization needs to maintain data. For example, you might consider pension payees, board members, or external students as POIs. The only required information for a POI is name, contact information, and POI type. Optionally, you can create a user profile for POIs.

POIs might also have job information if they originate in PeopleSoft HRMS. If the POI is created by integration with HRMS and does contain a job record, this data is stored in CRM and the user can view but not modify it. If a POI is created online in CRM, a job record cannot be created. Job information is not used for processing transactions within CRM, but, if available, it appears on the 360 Degree View pages.

Only basic person pages and not contact- or consumer-specific pages are available for a POI.

Configuring the Person Component

This section discusses how to

- Select the Person default role.
- Define POI types.

To define a person of interest type, use the Person of Interest Type (POI_TYPE_TBL) component.

Pages Used to Configure the Person Component

Page Name	Object Name	Navigation	Usage
Configure Person Component	RD_PERSON_CONFIG	Set Up CRM, Common Definitions, Customer, Configure Person Component	Select the default role and the pages that appear in the Person component when a user adds a person or views a person.
Person of Interest Type	POI_TYPE_TBL	Set Up CRM, Common Definitions, Customer, Person of Interest Type, Person of Interest Type	Define the valid POI types.

Selecting the Person Default Role

Access the Configure Person Component page.

Configure Person Component

Default Actions

<p>When User Clicks "Add Person" Button:</p> <p><input checked="" type="radio"/> Add new person with contact details</p> <p><input type="radio"/> Add new person with consumer details</p> <p><input type="radio"/> Add new person with worker details</p> <p><input type="radio"/> Add new person with person of interest details</p>	<p>View for Persons with Multiple Roles:</p> <p><input checked="" type="radio"/> View contact details if the person has Contact role</p> <p><input type="radio"/> View consumer details if the person has Consumer role</p> <p><input type="radio"/> View worker details if the person has Worker role</p> <p><input type="radio"/> View person of interest details if the person has POI role</p>
---	---

Configuration and Visibility

Configuration

Business to Business

Business to Customer

Mixed

Page Object ID	Description	*Visible
ACCOUNT_TEAM	Account Team Tab	Yes ▾
ADD_CONSUMER	"Add Consumer" Hyperlink in Primary Subtab	Yes ▾
ADD_CONTACT	"Add Business Contact" Hyperlink in Primary Subtab	Yes ▾
ADD_POI	"Add POI" Hyperlink in Primary Subtab	Yes ▾
ADD_WORKER	"Add Worker" Hyperlink in Primary Subtab	Yes ▾
ADDRESS_BOOK	Contact Info Tab	Yes ▾
ATTRIBUTES	Attributes Tab	No ▾

Configure Person Component page

Default Actions

Select the role that is added when a user selects Add Person from the menu and the role that appears when a user selects an existing person.

Configuration and Visibility

Business to Business, Business to Customer, and Mixed

Select an option to indicate whether the CRM installation supports business-to-business, business-to-consumer, or both. The option that you select determines the default page object settings.

Visible

Select *Yes* to have the selected page or link appear on the Person pages that appear to the user.

Defining POI Types

Access the Person of Interest Type page.

Person of Interest Type

Person of Interest Type: 00002 ***Status:** Active

***Description:** Pension Payee

***Short Description:** Pension

Job Record Required **Source Indicator:** HCM

[Modify System Data](#)

This object is maintained by PeopleSoft.

Modified 09/23/2004 4:07PM PDT PPLSOFT

Person of Interest Type page

- Job Record Required** Select if job data is required when POI records of this type are brought into CRM by integration with another system. For records that originate in the CRM system, the system clears this check box.
- Source Indicator** Select the source of POIs of this type. Value are: *CRM*, *External*, *HRMS*, and *SCM*.
- Modify System Data** Click to modify the POI definition. The button label then changes to Stamp System Data. Click Stamp System Data to record changes and flag the definition as changed.

Defining Person Information

To define person information, use the Person (RD_PERSON) component.

This section discusses how to:

- View and update primary person information.
- View and update person details.
- Maintain user information.
- Maintain sales team tasks for a person.
- Access call reports for a person.
- Access notes and attachments for a person.
- Access billing accounts.
- Maintain contact information for a person.
- View and update person relationships.
- View and update person profile information.

Note. The search page that is used to access person records has two versions, depending on whether the user can view secured worker data. This setting is controlled by permission lists.

See Also

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

Pages Used to Define Person Information

Page Name	Object Name	Navigation	Usage
Person Search	RD_PRSN_SRCH	Customers CRM, Search Person	Search for an existing person. This search page appears only for users who can view a worker’s secured information.
Person Search	RD_PRSN_SRCH_SEC	Customers CRM, Search Person	Search for an existing person. This search page appears only for users who cannot view a worker’s secured information.
Person (<Role>) - Person: Primary	RD_PRSN_PRIMARY	<ul style="list-style-type: none"> Select an existing person on the Person Search page. Click the Primary link. Customers CRM, Add Person Click the Primary link. 	View and update primary (most important and frequently accessed) person information and select the person role to access. As delivered, the <i>Business Contact</i> role appears by default.
Person (<Role>) - Edit Labels for User Defined Fields	RD_PRSN_UDF_L_EDIT	Click the Edit User Defined Field Labels link on the Person - Primary page.	Modify the system-defined labels that appear for user-defined fields.
Person (<Role>) - Person: Details	RD_PRSN_DETAILS	Click the Details link on the Person page.	View and update person details.
Person (<Role>) - Credit Cards	PD_PERSON_CC	Click the Credit Card link on the Person page.	Maintain the customer or contact credit card information.
Person (<Role>) - Person: User Profiles	RD_PERSON_USER	Click the User Profiles link on the Person page.	Maintain user information for a person who is permitted to access the online system.
Person (<Role>) - Tasks	RD_TASK_LIST	Select the Tasks tab on any page in the Person component.	Maintain sales team tasks for contacting a consumer or contact.
Person (<Role>) - Call Reports	RD_PRSN_CALL_RPTS	Select the Call Reports tab on any page in the Person component.	Access call reports for a person.
Person (<Role>) - Call Reports	RD_PRSN_CALL_RPTS	Select the Call Reports tab on any page in the Person component.	Access call reports for a person.

Page Name	Object Name	Navigation	Usage
Person (<Role>) - Billing Accounts	RBT_ACCOUNT_PG	Select the Billing Accounts tab on any page in the Person component.	Access a person's billing account.
Person (<Role>) - Contact Info	RD_PRSN_ADDR_BOOKS	Select the Contact Info tab on any page in the Person component.	Maintain contact information for a person.
Person (<Role>) - Relationships	RD_PERSON_REL	Select the Relationships tab on any page in the Person component.	View and update the person's relationships with other business objects.
Person (<Role>) - More Info (person - more information)	RD_PROFILE	Select the More Info tab on any page in the Person component.	View and update a person's marketing profile data.

Viewing and Updating Primary Person Information

Access the Person (<Role>) - Person: Primary page.

Note. The Person component is used to enter and maintain persons with the Business Contact, Consumer, or Person of Interest roles. The specific role with which you are working is noted with the (<Role>) label in the page title; for example, *Person (Business Contact)*.

Person (<Role>) - Person: Primary page (1 of 3)

Contact Info Entries

*Description [More...](#)

Phone

*Type	Country Code	Number	Ext/PIN
Business	<input type="text"/>	555 5551260	<input type="text"/>
Cellular	<input type="text"/>	<input type="text"/>	<input type="text"/>
FAX	<input type="text"/>	<input type="text"/>	<input type="text"/>
Pager	<input type="text"/>	<input type="text"/>	<input type="text"/>

Email

*Type	Email Address
Business	smarx@peoplebank_psft.com
Other	<input type="text"/>

Address

[Look up Address](#)

*Type

*Country

Address 1

Address 2

Address 3

City

County

State [New York](#)

Postal

[Set Display](#)

Person (<Role>) - Person: Primary page (2 of 3)

User Defined Fields

Field 1	<input type="text"/>	Field 2	<input type="text"/>
Field 3	<input type="text"/>	Field 4	<input type="text"/>
Field 5	<input type="text"/>	Field 6	<input type="text"/>
Field 7	<input type="text"/>	Field 8	<input type="text"/>
Field 9	<input type="text"/>	Field 10	<input type="text"/>

[Edit User Defined Field Labels](#)

[Edit Consumer Information](#)

[Edit Worker Information](#)

[Add Person of Interest Information](#)

Person (<Role>) - Person: Primary page (3 of 3)

When you first access this page in add mode, the page is titled Person (Business Contact). When you access information for an existing person who either has the Contact role only or both the Contact and Consumer roles, the page is titled Person (Business Contact). The page is titled Person (Consumer) if you are viewing information for a person who has only the Consumer role.

You can configure which role appears by default when you add a person or search for a person who has both the Contact and Consumer roles.

See Chapter 11, “Defining Person Business Objects,” [Configuring the Person Component, page 143](#).

The links at the bottom of the page enable you to view information for another person role. Different links appear depending on which role is currently shown. For example, when the Consumer pages appear, the link is Add Contact Information or Edit Contact Information. The links show the words *Add* or *Edit* depending on whether the role information already exists for the person.

Add Consumer Information and Edit Consumer Information

Click to add the Consumer role to the person or, if the Consumer role already exists for the person, to edit consumer information. The common information appears, but consumer-specific pages appear instead of contact-specific pages.

Note. This link appears if the Contact pages for a person currently appear.

Add Contact Information and Edit Contact Information

Click to add the Contact role to the person or, if the Contact role already exists for the person, to edit contact information.

Note. This link appears only if the Consumer pages for a person currently appear.

Add Worker Information and Edit Worker Information

Click to add or edit worker information for the person. The common information appears, but worker-specific pages appear instead of contact-specific pages.

Note. The Worker component is the primary place where worker information is viewed and updated.

See [Chapter 12, “Defining Workers,” page 157](#).

Add Person of Interest Information and Edit Person of Interest Information

Click to add or edit person of interest information for the person.

Person Information

Enter basic name information. The name information appears differently depending on the country that is specified for the user. For example, in Japan, the last name appears in order before the first name.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” Updating Name Information, page 50](#) and *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up Security and User Preferences,” Defining Overall Preferences.

For double-byte operating systems, you can enter the name and address information in alternate character format.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Implementing Alternate Character”.

Contact Info Entries

Enter address, phone, and email information. Two Contact Info Entries regions appear on this page: one for home information and one for business information.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Contact Information for Business Objects, page 53](#).

Alternate Character

For double-byte operating systems, you can enter the name and address information in alternate character format.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Implementing Alternate Character”.

User-Defined Fields

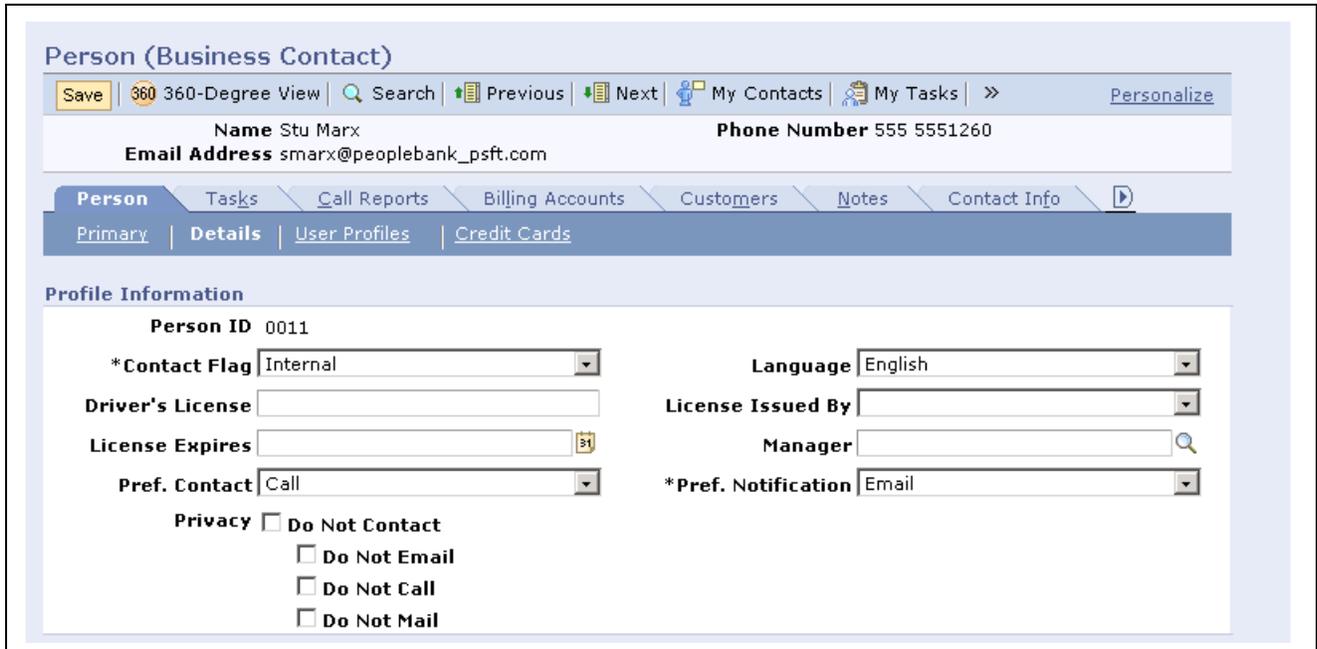
You can define up to 10 fields in which to enter and store information that is useful to you. This information is stored on a separate table in the database and is available for users that you create.

Edit User Defined Field Labels

Click to enter labels for user-defined fields. For example, you might change the label Field 1 to Name of Pet.

Viewing and Updating Person Details

Access the Person (<Role>) - Person: Details page.



Person (<Role>) - Person: Details page

The example that is shown is for the Business Contact role. If you are viewing information for a person with the Consumer role, the Purchasing Options and Status and Currency Data page regions appear.

Profile Information

Privacy

Select an option to indicate restrictions on ways of contacting the person.

Purchasing Options

This page region appears only for a person with the Consumer role.

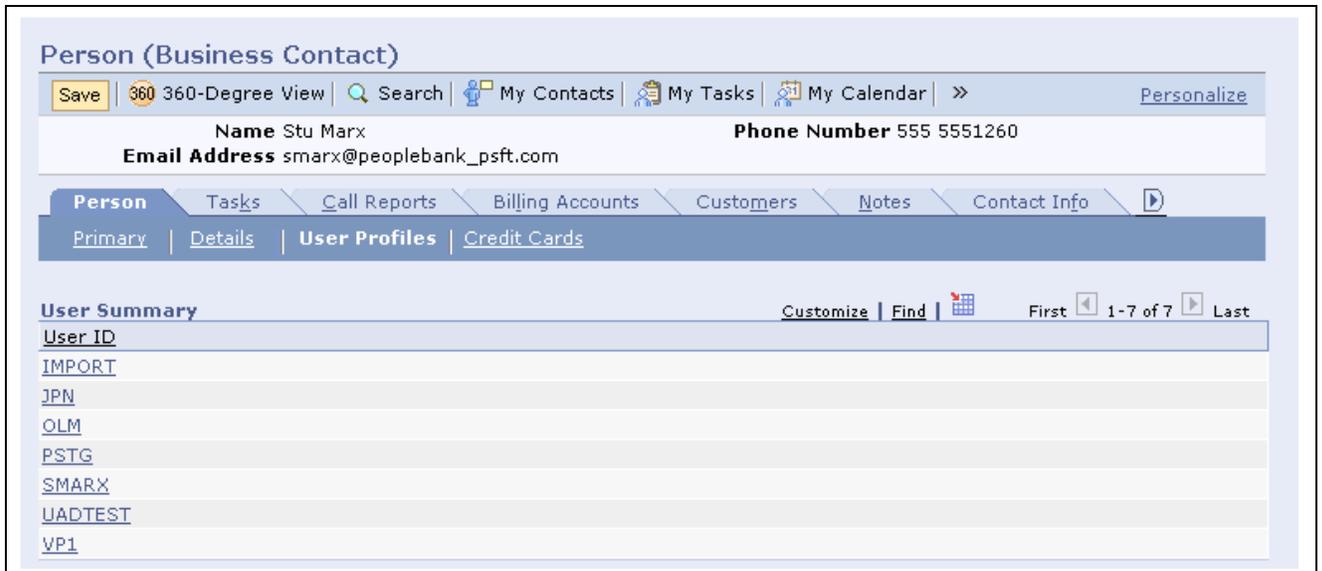
Status and Currency Data

This page region appears only for a person with a contact role in the financial market.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up Currencies”.

Maintaining User Information

Access the Person (<Role>) - User Profiles: User Summary page.



Person (<Role>) - Person: User Profiles: User Summary page

In the User Summary region, the user IDs that are already associated with the person appear. If no users are associated, then no user information appears.

User ID Click a user ID to access the detailed user profile information.

Add New User Click to add a new user. When you click this button, more fields appear on the page for you to enter information about the user.

User Information Detail

Access the Person (<Role>) - Person: User Profiles: User Information Detail page.

User Information Detail

Logon Information

*User ID:

*Password:

*Confirm Password:

Permission Lists

Process Profile:

Primary:

Locked Out?

Contact Roles

Role Name	Description		
	Employee	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="EOPP_USER"/>	Common Portal User	<input type="button" value="+"/>	<input type="button" value="-"/>
	Env. Mgmt. Packaging	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="PAPP_USER"/>	Enterprise Portal User	<input type="button" value="+"/>	<input type="button" value="-"/>
	PeopleSoft Admin Privileges	<input type="button" value="+"/>	<input type="button" value="-"/>
	PeopleSoft User	<input type="button" value="+"/>	<input type="button" value="-"/>
	ALLPAGES	<input type="button" value="+"/>	<input type="button" value="-"/>
	Can start application server	<input type="button" value="+"/>	<input type="button" value="-"/>

[Return to User Summary](#)

Person (<Role>) - Person: User Profiles: User Information Detail page

User Information Detail

Enter user ID, password, and permission list information for the user.

Contact Roles

You can grant security roles to the person who is associated with the user ID. The Role Name field lists only roles that you have permission to grant based on your user ID.

See Also

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

Maintaining Sales Team Tasks for a Person

Access the Person (<Role>) - Tasks page.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Tasks”.

Accessing Call Reports for a Person

Access the Person (<Role>) - Call Reports page.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Call Reports,” Working with Call Reports.

Accessing Notes and Attachments for a Person

Access the Person (<Role>) - Notes page.

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

Accessing Billing Accounts

Access the Accounts page.

Maintaining Contact Information for a Person

Access the Person (<Role>) - Contact Info page.

See Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Contact Information for Business Objects, page 53.

Viewing and Updating Person Relationships

Access the Person (<Role>) - Relationships page.

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

Viewing and Updating Person Profile Information

Access the Person (<Role>) - More Info (more information) page.

See Chapter 7, “Working with Business Object Profiles,” page 81.

Defining Information for Business Contacts

This section lists the pages that are used to define information for business contacts.

Pages Used to Define Information for Business Contacts

Page Name	Object Name	Navigation	Usage
Person (Business Contact) - Customers	RD_PERSON_COMP	Select the Customers tab on any page in the Person (Business Contact) component.	Maintain the customers that are associated with a business contact.
Person (Business Contact) - Add Customer / Site / Purchasing Options	RD_PERSON_ADD_COMP	Click the Add Customer button on the Person (Business Contact) - Customers page.	Add customers for a contact.
Search For Customer	RBQ_BOSRCH	Click the Search icon on the Person (Business Contact) - Add Customer / Site / Purchasing Options page.	Search for a customer to add for the contact.

Defining Consumer Information

This section discusses how to:

- Maintain tax exempt information for a consumer.
- Maintain purchasing options for a person.
- Define account teams.
- Define account plans.
- Maintain consumer contact information.

Pages Used to Define Consumer Information

Page Name	Object Name	Navigation	Usage
Person (Consumer) - Person: Purchasing	RD_CONSUMER_BC_OPT	<ul style="list-style-type: none"> • Add Person Click the Purchasing link. • Select an existing person on the Person Search page. If the Purchasing link does not appear, click the Add Consumer Information link or Edit Consumer Information link, whichever appears. Click the Purchasing link. 	Maintain purchasing options for a person.
Person (Consumer) - Person: Employments	RD_PERSON_EMPLOY	Click the Employments link on the Person page for a person with the Consumer role.	Add a person's employment history.

Page Name	Object Name	Navigation	Usage
Person (Consumer) - Person: Tax Exempt Certificate	RD_TAX_EXEMPT_CONS	Click the Tax Exempt Certificate link on the Person page for a person with the Consumer role.	Maintain a person's tax exemption information.
Person (Consumer) - Account Team	RD_ACCOUNT_TEAM	Select the Account Team tab on any page in the Person component for a person with the Consumer role.	Define the account team that is assigned to the consumer.
Person (Consumer) - Plan	RD_ACCOUNT_PLAN	Select the Plan tab on any page in the Person component for a person with the Consumer role.	Define the account plan for the consumer.
Person (Consumer) - Contact Info: Contacts	RD_CONSUMER_REP	Customers CRM, Search Person, Person (Individual Consumer), Contact Info Click the Contacts link.	Maintain the list of contacts for a consumer.
Create Contact of <consumer>,	RBQ_QCREATE	Click the Add Contact button on the Contacts page for a consumer.	Add a contact to a consumer.
Modify <contact>	RBQ_QCREATE	Click the Edit button for any listed contact of a consumer.	Maintain information for an existing company contact, including purchasing options and contact information.
Person (Consumer) - Sites	RD_CONSUMER_SITE_2	Click the Sites link on the Contact Info page for a person who is a consumer.	Maintain the list of sites for a consumer.
Create Site of <consumer>,	RBQ_QCREATE	Click the Add Site button on the Sites page for a consumer.	Add a site to a consumer.
Modify <site>	RBQ_QCREATE	Click the Edit button for any listed site of a consumer.	Maintain information for an existing company site.

See Also

[Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Contact Information for Business Objects, page 53](#)

Maintaining Tax Exempt Information for a Consumer

Access the Person (Consumer) - Person: Tax Exempt Certificate page.

See [Chapter 9, “Defining Company Business Objects,” page 115](#).

Maintaining Purchasing Options for a Consumer

Access the Person (Consumer) - Person: Purchasing page.

See [Chapter 5, “Defining Purchasing Options for Companies, Consumers, and Sites,” page 69](#).

Defining Account Teams

Access the Person (Consumer) - Account Team page.

Person (Consumer) - Account Team page

You can add team members to the account team individually or automatically by using sales territory trees and assignment groups.

See *PeopleSoft Enterprise Sales 9 PeopleBook*, “Working with Customer Accounts,” Assigning Team to an Account.

Defining Account Plans

Access the Person (Consumer) - Plan page.

This page lists the account plans that are defined for the consumer. You can click a listed plan to drill down to its detail.

See *PeopleSoft Enterprise Sales 9 PeopleBook*, “Working with Customer Accounts,” Creating Account Plans.

Maintaining Consumer Contact Information

Access the Person (Consumer) - Contact Info page.

The Contact Info page enables you to maintain addresses, contacts, and sites for the consumer.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” Defining Customer Contacts, page 60](#) and [Chapter 4, “Defining Name and Address Information for Business Objects,” Defining Customer Sites, page 65](#).

Defining Person of Interest Information

To define POI information, use the Person (RD_PERSON) component. The information that you can enter for persons of interest is basic person data, as described previously in this chapter. If the POI originated in a HRMS system, the person might have job records associated with them.

CHAPTER 12

Defining Workers

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

- Create workers using the Worker component.
- Maintain worker information.
- Set up foundational data for workers.

Understanding Workers in CRM

This section discusses:

- Workforce administration.
- Options for creating workers.
- Job information and effective dates.

Workforce Administration

Worker refers to anyone who performs work for an organization, including employees and contractors. Employees who are not part of the CRM workforce are considered CRM customers in the sense that they might call the help desk or human resources help desk for assistance with problems. This chapter focuses on maintaining the information that is necessary to administer workers who are part of the CRM workforce and to assign them to field service and support tasks.

In CRM, workers are represented as Person business objects with a role type of Worker. The Person table (RD_PERSON) contains a record for each worker, with Person ID as the key field. Attributes that are specific to the person's role as a worker, such as employee status, job location, work function, and so forth, are stored in the Worker table (RB_WORKER).

Workers are not tracked as business contacts, although you can assign the Contact role to a worker.

See [Chapter 11, "Defining Person Business Objects," Viewing and Updating Primary Person Information, page 147.](#)

Worker User Preferences and Security

Workers often have access to the CRM system to perform their functions. You can control worker access to data for system functions.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up Security and User Preferences," Defining Roles with Access to Sensitive Worker Information and *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up Security and User Preferences".

Worker Foundational Data

Worker foundational data is the control information (or prompt tables) from which you select when creating a worker. This data describes the organization infrastructure in which workers perform. You can maintain these tables in CRM, PeopleSoft Human Resources Management (PeopleSoft HRMS), or a third-party system and move the data to CRM by implementing enterprise integration points (EIPs).

This is the worker foundational data that you must set up before creating workers:

- Job codes.

Use the Job Code Table EIP to integrate with an HRMS system.

- Department tables.

Use the Department Table EIP to integrate with an HRMS system.

- Locations.

- Competency information.

Worker competency information determines which workers are best qualified for assignment to a case or service order. Use the Competency Type, Rating Model, and Competency EIPs to integrate with an HRMS system.

See [Chapter 17, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” page 299](#).

Navigation

CRM provides two ways to access pages that you might use when setting up worker data: the left-hand menu and the Worker Administration Center. This chapter lists the left-hand menu navigation.

See Also

PeopleSoft Enterprise Components for CRM 9 PeopleBook

Options for Creating Workers

After you set up the foundational data, you create workers in several ways:

- Use the Person or Worker component to create and maintain worker records in CRM.

When you create a worker in the Worker component, you can create a new worker, copy data from an existing worker, or copy data from a template worker.

- Integrate worker data with PeopleSoft HRMS or a third-party human resources system.

You implement the Personal Data, Workforce Data, and Person Competencies EIPs to populate the Person, Worker, and Worker Competency tables in the CRM system .

If you integrate with a human resources system that maintains worker data, do not modify the personal data, job detail, and competencies that are entered in the human resource system. You should use the Worker pages in CRM to maintain only user profiles, notes, and worker data that is used by the CRM assignment engine.

- Use quick create functionality.

The Quick Create component requires that you enter the minimum required information and is used to quickly enter data.

Copying Existing and Template Workers

Creating a worker by copying an existing worker and creating a worker by copying a template worker are similar processes. The difference is in the way in which you identify the information to copy. When you copy an existing worker, you must search through the entire Worker table to identify the worker to copy; but when you copy a template worker, you can select the worker to copy from a drop-down list box that contains only workers that are designated as template workers.

Template workers are workers whose information represents a model to use when creating other workers. You can set up dummy workers, such as CSR Level 1, as template workers. You can also identify employees that are good template workers. For example, employee John Smith is a good template worker for CSR Level 1. You designate a worker as a template worker when you enter the job detail for the worker. Whether you designate real employees or set up dummy workers for templates is an implementation consideration.

When you create a worker by copying an existing worker or a template worker, all active worker roles are copied to the new worker. Current active job details for all assignments are copied, but not historical or future job details.

Worker Toolbar

The worker toolbar contains a Create from Current button that you can use to create a new worker from a worker whose data you are currently viewing and a Copy Data button that you can use to copy the worker's data to another worker.

See Also

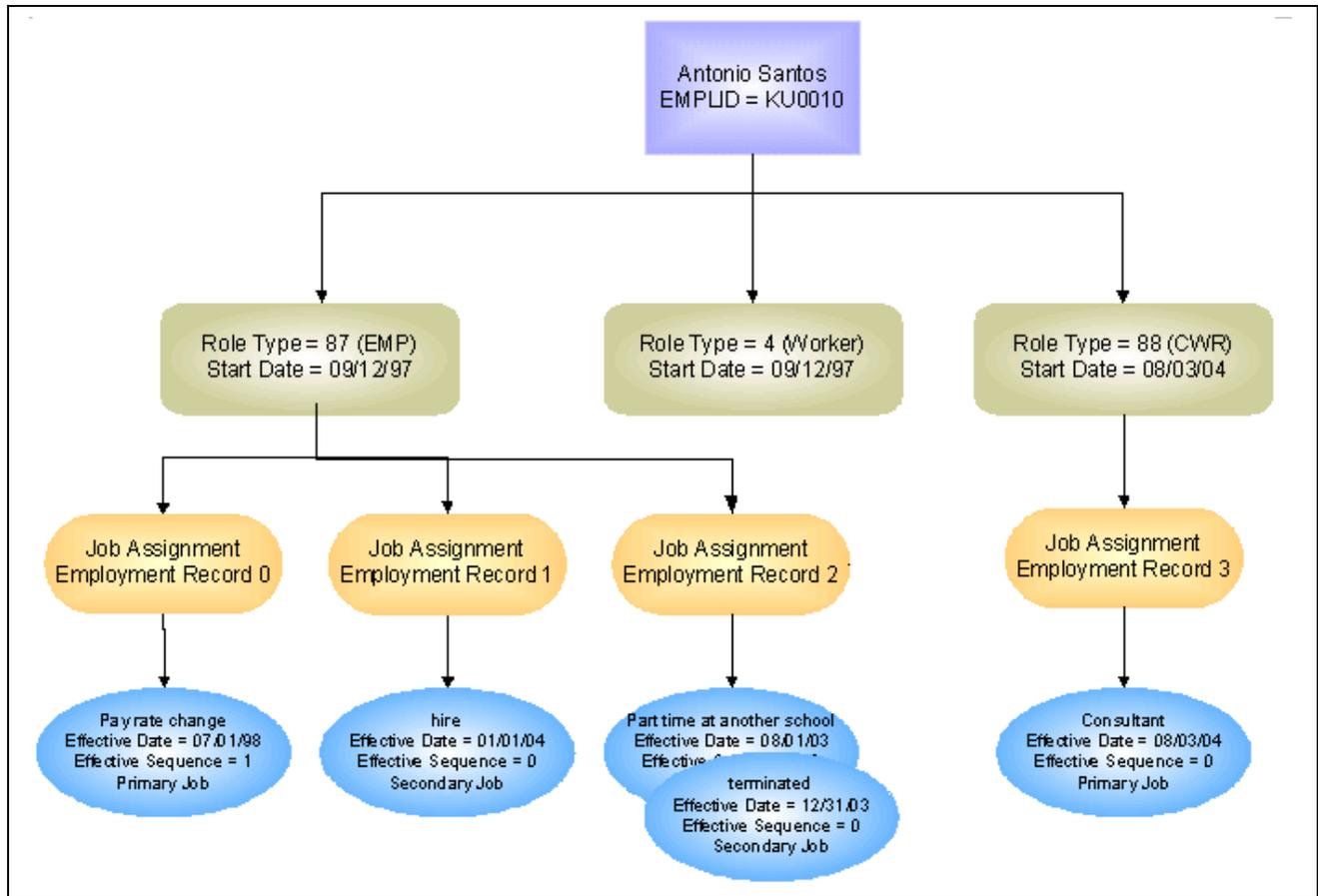
[Part 6, "Customer and Worker Data Integrations," page 297](#)

Job Information and Effective Dates

A worker's job assignments and their relation to the organization can change over time. For example, a worker can be promoted, perform a different job, or change from employee to contingent worker status. Changes in a worker's job and organizational relationships are represented in the database by effective dated assignment and job detail rows.

The current row is the most recent row whose effective date is less than the current date. Future dated rows are all rows whose effective date is greater than the current date, and historical rows are all rows whose effective date is less than the effective date of the current row.

This diagram illustrates the use of effective dates in managing a worker's assignments, roles, and job information:



Effective-dated job information

In this example, Antonio Santos was hired on September 9, 1997. Antonio is assigned the Worker and Employee roles as of his hire date, and the effective date of both roles is set to the date of hire. Initially, the end date for both roles is set to 12/31/2999.

Assignments and Roles

All workers have the *Worker* role by default, and must also have either the *Employee* or *Contingent Worker* role on each assignment. The *Worker* role is only terminated when all assignments for the worker are terminated.

Each worker can have multiple assignments, and assignment can have multiple effective-dated job detail records for it. You can add a new job assignment without changing existing job records. The first job record you add for a new job assignments always has the *Hire* action code, and you must specify the worker's role for each assignment. An assignment is terminated when all active job records that relate to it are terminated.

Jobs

There are two levels of primary jobs. One at the job level is user selected and could be called the *primary job*. There is another primary which is system defined and could be called the *primary job assignment*. The primary job assignment is determined by an algorithm and takes into consideration the primary job. A worker can have only one primary job assignment.

By default, the first job record added for a role is marked as the *Primary* job record for that role. The primary job assignment is used by the Assignment Engine when assigning workers to cases or service orders.

If a worker requires new job data for an existing assignment, for example, a new supervisor id, job code or location, you create a new effective dated job record for that assignment. When Antonio receives a pay increase, a new job record is inserted, effective July 1, 1998 to reflect the change. The new current record becomes the primary record. A background job runs to mark the primary flag on future job records.

Creating Workers

To create workers, use the Add Worker (RD_CREATE_WORKER) and Copy Worker (RD_COPY_WRKR_DATA) components.

This section lists prerequisites and discusses how to:

- Select the method for creating a worker.
- Select information to copy to a new worker.
- Create workers using the Quick Create function.

Prerequisites

Before you create workers, you must set up the tables that contain information that is referred to by all workers. For example, each worker belongs to a department and has a job code. The information in these tables is called foundational data.

See [Chapter 12, “Defining Workers,” Setting Up Foundational Data for Workers, page 177](#).

Pages Used to Create Workers

Page Name	Object Name	Navigation	Usage
Add Worker	RD_CREATE_WORKER	Workforce, Add Worker, Add Worker	Select the method for creating a new Worker business object.
Add Worker	RD_COPY_OPTIONS	Access the Add Worker page. <ul style="list-style-type: none"> Select the Template Worker option and select a template worker from the available choices. Enter the first and last names. Click the Continue button. Select the Existing Worker option and select an existing worker. Enter the first and last names. Click the Continue button. 	Select information to copy to a new worker from either a template or an existing worker.
Add Worker	RD_COPYWRKR_CONFRM	Click the Create Worker button on the second Add Worker page.	Verify that the worker information is correct.
Create Worker	RBQ_QCREATE	Customers CRM, Quick Create Search for a description of <i>The Worker</i> .	Add a worker with the minimum necessary information.

Selecting the Method for Creating a Worker

Access the Add Worker page.

The screenshot shows the 'Add Worker' page interface. At the top, there is a title 'Add Worker' and a sub-section 'Select Creation Method'. Under this section, there are three radio button options: 'Template Worker' (which is selected), 'Existing Worker', and 'New Worker'. To the right of these options are two dropdown menus; the first one contains the text 'Spencer Underwood'. Below this is the 'Information for New Worker' section, which contains three text input fields: '* First Name' with the value 'Mary', '* Last Name' with the value 'Kumar', and 'Employee ID' with the value 'KU100'. At the bottom of the form is a yellow 'Continue' button.

Add Worker page

Select Creation Method

Template Worker	Select to create the new worker from a template worker. Select the template worker from the drop-down list box.
Existing Worker	Select to create the new worker from an existing worker. Search for and select the worker to copy.
New Worker	Select to access the Worker component and enter information for the new worker.

Information for New Worker

Enter the first and last names for the new worker, and optionally enter the employee ID.

Selecting Information to Copy to a New Worker

Access the Add Worker page.

Add Worker

Worker Selection

Copy From Spencer Underwood

New Worker Mary Kumar

Select Data to Copy

Select the data you wish to copy. Any existing data for target worker will be erased.

<input checked="" type="checkbox"/> Work Schedule	<input checked="" type="checkbox"/> Skills and Competencies
<input checked="" type="checkbox"/> Provider Group Membership	<input checked="" type="checkbox"/> Assignment Criteria
<input checked="" type="checkbox"/> Job Detail (HCM Information)	

The following Copy Options require User ID and Password:

<input checked="" type="checkbox"/> CRM User Preferences	<input checked="" type="checkbox"/> Group Worklist Membership
<input type="checkbox"/> MCF Email and Chat Settings	<input checked="" type="checkbox"/> User Profile Information

User ID

Password

Confirm Password

Previous
Create Worker

Add Worker page

Select Data to Copy

Select the data to copy from the template worker or existing worker to the new worker. The job detail data is selected and copied by default—you cannot clear this check box.

If you select User Profile Information, CRM User Preferences, MCF Email and Chat Settings (multichannel framework email and chat settings), or Group Worklist Membership, you must enter a user ID and password for the new worker.

See Also

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

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

Creating Workers Using the Quick Create Function

Access the Quick Create page.

Create Worker page (1 of 2)

Create Worker page (2 of 2)

You can use this page in two modes:

- To enter information for a new worker.

You can only create one effective dated job row. This page does not enable you to set up security information: user IDs, roles, and passwords.

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

- To retrieve and modify existing worker information.

Search Existing Person

Click to retrieve the information for an existing person. You can modify the information and click the Apply button to update the database.

Note. Job Assignment information does not appear for an existing worker.

Maintaining Worker Information

To maintain worker information, use the Worker (RD_WORKER_2) component.

This section discusses how to:

- View and maintain summary worker information.
- View and maintain worker details.
- View and maintain user profiles.
- Enter job information.
- Define default schedules.
- Associate competencies with workers.

- Define job assignment criteria.
- Associate workers with provider groups and worklists.
- Define default storage locations.
- Define default signatures.

See Also

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

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Setting Up General Options,” Setting Up Address Formats and Values

Pages Used to Maintain Worker Information

Page Name	Object Name	Navigation	Usage
Worker	RD_WORK_GSRCH	Workforce, Search Worker	Search the database for existing workers.
Person	RD_PERSON_SEARCH	Customers CRM, Search Person	Search the database for existing persons. Note. To access the Worker component for a person, click the Add Worker Information or Edit Worker Information link on the Person - Summary page.
Worker - Worker: Primary	RD_PRSN_PRIMARY	<ul style="list-style-type: none"> • Workforce, Search Worker, Primary • Workforce, Add Worker Enter required information on the Add Worker pages and click the Create Worker button.	View and update summary information for a worker.
Worker - Worker: Details	RD_PRSN_DETAILS	Click the Details link on the Worker - Primary page.	View and maintain worker profile information.
Worker - Worker: User Profiles	RD_PERSON_USER	Click the User Profiles link on the Worker - Primary page.	Maintain the worker’s user profile.
Worker - Job: Job Details	RD_WORKER_DETAIL	Select the Job tab from any page in the Worker component.	Enter information about the specified worker’s job.
Worker - Job: Job Summary page	RD_ASGN_JOB	Select the Job tab from any page in the Worker component. Scroll to the bottom of the Job Detail page and click the Return to Summary link.	View assignment summary information for the worker.

Page Name	Object Name	Navigation	Usage
Worker - Work Schedule	RD_WORKER_SCHEDULE	Select the Work Schedule tab from any page in the Worker component.	Define default workdays for the specified worker.
Worker - Skills and Competencies	RD_WORKER_CMP_PROF	Select the Skills and Competencies tab from any page in the Worker component.	Associate the specified worker with a competency and define the worker's level of proficiency for the competency.
Worker - Assignment Criteria	RD_WORKER_CRITERIA	Select the Assignment Criteria tab from any page in the Worker component.	Define criteria that the assignment engine uses to match the specified worker to a case or service order.
Worker - Groups	RD_WORKER_GROUPS	Select the Groups tab from any page in the Worker component.	Associate the worker with provider groups and group worklists.
Worker - Storage Locations	RD_WORK_STORLOC	Select the Storage Locations tab from any page in the Worker component.	Define inventory storage locations that are associated with good and defective storage locations on a field service worker's truck.
Worker - Signature	RD_WORKER_WF_SIG	Select the Signature tab from any page in the Worker component.	Define a default signature to use when the specified worker sends manual notifications.
Worker - Notes	RD_PERSON_NOTES	Select the Notes tab from any page in the Worker component.	Add notes and attachments for the specified worker.
Worker - Address Book	RD_PRSN_ADDR_BOOKS	Select the Address Book tab from any page in the Worker component.	View and update a worker's contact information.
Worker - More Info	RD_PROFILE	Select the More Info (more information) tab from any page in the Worker component.	View and update a worker's marketing profile data.

Viewing and Maintaining Summary Worker Information

Access the Worker - Worker: Primary page.

Worker - Worker: Primary page

The Worker - Primary page and the Person - Primary page are identical in appearance and usage, except:

- The Worker - Primary page contains the Employee ID and Title.
- The Person - Primary page contains a setID.

Contact Info entries and User Defined fields on the Worker - Primary page behave the same as those on the Person - Primary page.

See [Chapter 11, “Defining Person Business Objects,” Viewing and Updating Primary Person Information, page 147.](#)

Viewing and Maintaining Worker Details

Access the Worker - Worker: Details page.

Worker - Worker: Details page

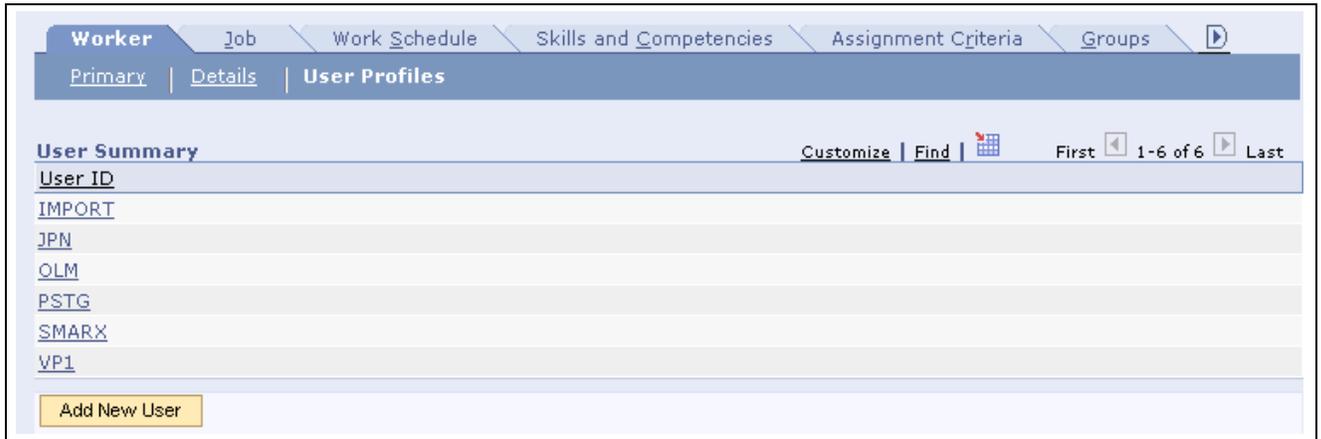
This page is similar in appearance and use to the Person - Details page, except:

- Only the Profile Information page region appears on the worker page.
- On the worker page, the Use as Template Worker field enables you to make this worker’s information available as a template for creating a worker.

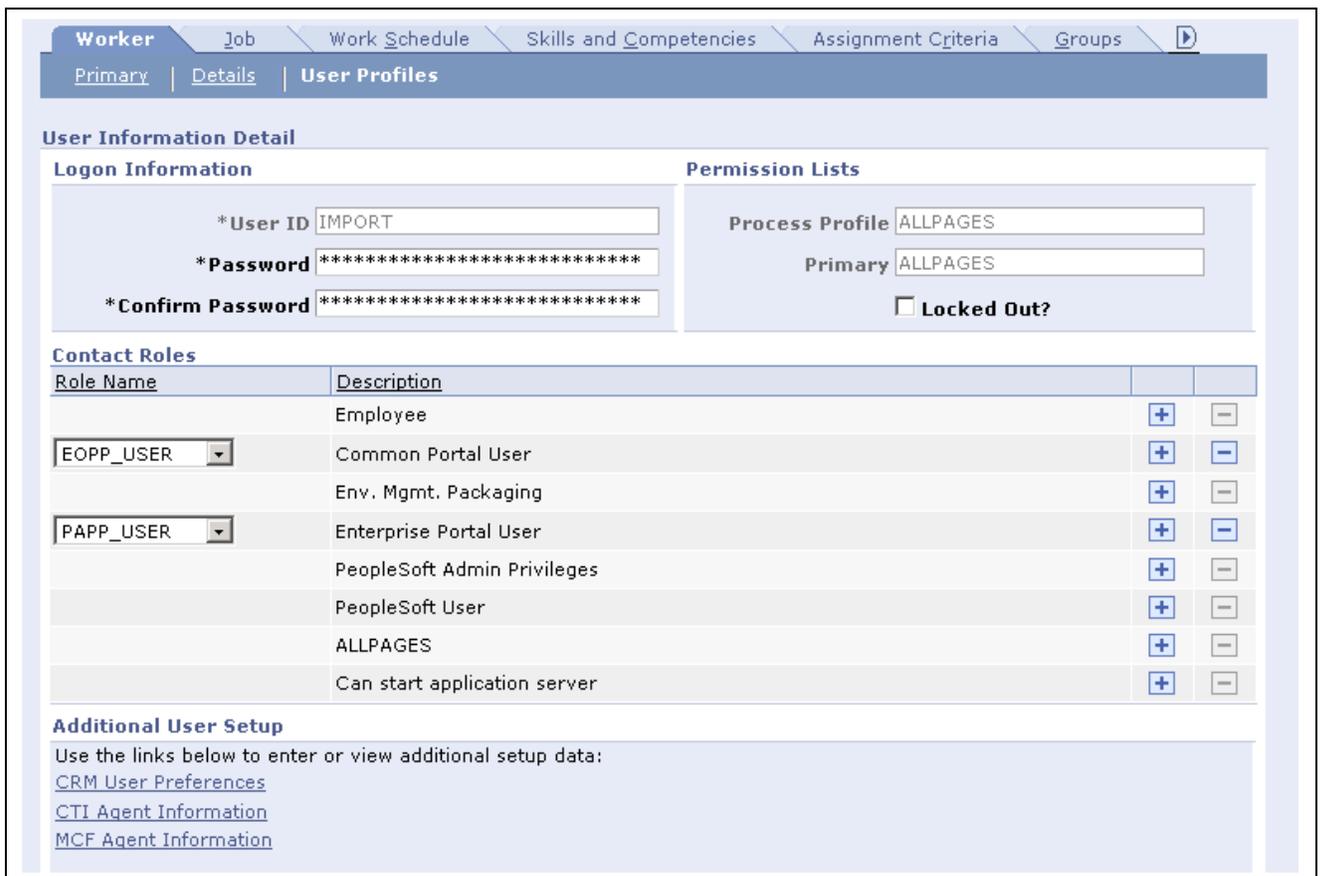
See [Chapter 11, “Defining Person Business Objects,” Viewing and Updating Primary Person Information, page 147.](#)

Viewing and Maintaining User Profiles

Access the Worker - Worker: User Profiles page.



Worker - Worker: User Profiles: User Summary page



Worker - Worker: User Profiles: User Information Detail page

A list of the user IDs that the worker is authorized to use appears in the User Summary region of this page. You can click a listed user ID to view and modify the details of the user ID or click the Add New User button to add a new user ID to the worker.

This page is similar in appearance and use to the Person - User Profiles page, except that the Additional User Setup page region appears on the detail view of the page for workers in the GBL market.

See Also

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

Entering Job Details

Access the Worker - Job: Job Details page.

The screenshot displays the 'Job Details' page for a worker. At the top, there are navigation tabs: Worker, Job (selected), Work Schedule, Skills and Competencies, Assignment Criteria, and Groups. The page title is 'Worker Role Employee' and 'Assignment Start 05/17/2005'. Below the title, there are search and navigation options: 'Find | View All', 'First', '1 of 2', and 'Last'. The main content area is divided into two columns. The left column contains fields for: *Effective Date (05/18/2005), Job Indicator (Primary), *Reg/Temp (Regular), *Job Code SetID (SHARE), *Job Code (KUC10), *Department SetID (SHARE), *Department (KU016), *Location SetID (SHARE), *Location Code (KUCA00), Physical Location, Time Zone (PST), Holiday Schedule (2002), Supervisor ID (300044), and *Officer Code (None). The right column contains: Effective Sequence (0), Source (CRM), *Full/Part Time (Full-Time), Job (Sr. Customer Service Rep), GL Business Unit, Dept. Description (Customer Service), Location (California Location), Schedule (Year 2002), Supervisor (Angela Lucca), and Manager Level (Non-Manager). At the bottom of the form, there are two buttons: 'Add New Job Details' and 'Delete Job Details'. Below the buttons is an 'Audit History' section and a 'Return to Summary' link.

Worker - Job: Job Details page

By default, job details for the currently active primary job for the worker appears on this page. All workers are able to scroll through and view historical, current and future job information. When the worker has existing job data and requires new job data, for example, a new supervisor id, job code or location, you add a new job details row with the new information. By default, the new effective date is the current date.

All users can update and delete effective dated future job rows within a job assignment as long as at least one effective dated row for each job assignment remains. All users can view historical, current and future job data.

Secured Worker Information

You can perform these functions only if your signon role has secured worker access:

- Modify historical and current-dated job information records.
- Delete historical and current job information records.
- Modify the worker’s Employee Status.

- View the worker's HR (Human Resources) status. Examples of HR status are: *Active*, *Retired*, and *Terminated*.

Job Information

Worker Role	Select the worker's role. The worker role indicates the worker's relationship to the organization. Values are <i>Employee</i> and <i>Contingent Worker</i> . This field is enterable only for the earliest job details record on an assignment.
Effective Date	Enter the effective date of the current job details. When you add a new job details current date appears by default. All workers can view present, current, and future job details. The ability to modify
Effective Sequence	Sequences the order in which job detail records appear. When you add a new job details record, it is added as sequence number zero and the sequence numbers on the existing job details records are incremented by one. This is to ensure that job details appear in descending date order.
Job Indicator	Indicates that this is the primary job for the assignment. t. When you add a new job record and mark it as primary, the system recalculates the primary job assignment indicator.
Source	Indicates the source of the job record. Values are <i>HCM</i> , indicating that the job information was imported from the HCM system and <i>CRM</i> , indicating that the information was entered in CRM. You cannot update job records that originated in the HCM system.
GL Business Unit (General Ledger business unit)	Enter the business unit that is used to account for the worker's costs on the general ledger.
Physical Location	Enter a description of the worker's physical location. You can use this field to specify locations such as an office or cubicle number.
Holiday Schedule	Select the holiday dates that are valid for this worker.
Supervisor ID	Select the supervisor to whom this worker reports.
Officer Code	Select an officer code to identify highly compensated employees for the Non-Discrimination Testing - 401(k)/401(m) report (NDT004).
Manager Level	Select the worker's management level, if applicable.
Return to Summary	Click this link to view the Job Summary page, which lists summary information about the worker's assignments.

Entering Job Codes, Departments, and Locations

Job Code, Department, and Location Code are controlled by setID. You must enter the corresponding setID, and only values for the setID are valid. This information is defined when you set up worker foundational data.

See Also

[Chapter 12, “Defining Workers,” Setting Up Foundational Data for Workers, page 177](#)

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

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

Viewing Assignment Summary Information

Access the Worker - Job: Job Summary page.

Primary	Assignment Description	Current Job Date	Assignment Start	Assignment End	Role	Employee Status
<input type="checkbox"/>	Agent-HR Help Desk L1	11/30/2001	09/04/1995	11/30/2001	Employee	Terminated
<input checked="" type="checkbox"/>	Administrator Customer Service	03/01/2004	03/01/2004	12/31/2999	Employee	Active

Add Job Assignment

Worker - Job: Job Summary page

Use this page to view summary information from all the assignments the worker has had and drill down into the job details for any past, current, or future assignment. The system determines the assignment start and assignment end date from the dates of the job detail records for the assignment. The system also determines the primary assignment for the worker

Add Job Assignment

Click to add a new job assignment. New job assignments are added with the *Hire* action/reason. When you add a new job assignment, the Job Details page appears.

Defining Default Schedules

Access the Worker - Work Schedule page.

Time Zone Pacific Time (US), Tijuana

Scheduling Options

Monday Tuesday Wednesday Thursday

Start	End														
8:00AM	5:00PM	+	-												

Friday Saturday Sunday

Start	End			Start	End			Start	End		
8:00AM	5:00PM	+	-			+	-			+	-

[View Calendar](#)

Worker - Work Schedule page

When evaluating worker availability for assignments, the system checks standard work week information that you define for the worker on this page.

Select the default work days for the specified person. The Start and End fields define the default hours of operation for the person. Enter start and end times for each work period in the day. You can enter multiple work periods to represent lunch breaks, shifts, and so forth. By default, the system populates these values with the standard work week information that you define for the installation.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Setting Up and Performing Assignment Searches”

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

Associating Competencies with Workers

Access the Worker - Skills and Competencies page.

*Competency	*Proficiency
Repair Freezer	Certified Technician
Certified in Refrigeration	Yes
Customer Rep Experience	5-Expert
Appliances Service & Repair	1-Little

Add Competency

Worker - Skills and Competencies page

Important! Before assigning competencies on the Worker - Skills and Competencies page in CRM, you must select the Use Only Evaluation Type installation option.

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

The Person Competency EIP loads competency data with all evaluation types into CRM. Although the evaluation type does not appear in CRM, CRM pages list only the competency records that match the specified evaluation type. If you do not specify an evaluation type during the installation, competency records for all evaluation types are available, which can degrade system performance.

Description

Select a competency that is associated with the worker. In CRM, you establish competencies on the Competencies page under Set Up CRM, Common Definitions, Competencies.

Proficiency

Enter the worker’s level of expertise for the competency. The rating model that is defined for the competency on the Competencies page determines the available proficiency values. In PeopleSoft FieldService, the system checks a worker’s proficiency level for a competency to determine whether the worker is qualified to perform work on a service order that requires the competency. In PeopleSoft Support and PeopleSoft HelpDesk, the system checks a worker’s

proficiency level for a competency to determine whether the worker is qualified to perform work on a case that requires expertise in the problem type.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Setting Up and Performing Assignment Searches”

Defining Job Assignment Criteria

Access the Worker - Assignment Criteria page.

Worker				Job		Work Schedule		Skills and Competencies		Assignment Criteria		Groups		
Region												Customize	Find	
*Description														
Northern California														
Customer												Customize	Find	
*SetID												*Customer	Site	
Product												Customize	Find	
*SetID												Description	Skill Level	
IPROD												Custom Build Freezer Package	Certified Technician	
IPROD												Sectional Walk-in Freezer	Certified Technician	
Product Group												Customize	Find	
*SetID												*Product Group		
IPROD												FREEZER		
Person Type												Customize	Find	
*Person Type														
Contingent Worker														

Worker - Assignment Criteria page (1 of 2)

Location												Customize	Find	
*SetID												*Location		
CRM01												Winnipeg Office		
Department												Customize	Find	
*SetID												*Description		
Security Role												Customize	Find	
*Role Description														
Field Service Agent														

Worker - Assignment Criteria page (2 of 2)

The system uses the values in the Customer, Region, Product, Product Group, Location, Department, and Role fields to evaluate how suitable a worker is for assignment to the service order, case, or change request task relative to other workers in the provider group.

When you perform an assignment search from a case, service order, or change request task, the assignment engine calculates a point value for each criteria value on the service order, case, or change request task that the worker matches based on the weight, or relative importance, of the match. The sum of the point values divided by the total possible points for the service order or case becomes the worker's fit score. Failure to match individual criteria lowers the worker's total fit score but does not exclude the worker from the list of suggested assignment candidates. Failure to match any criteria excludes the worker from the suggested candidates.

The assignment engine uses a different set of assignment criteria values for cases in PeopleSoft HelpDesk, cases in PeopleSoft Support, service orders in PeopleSoft FieldService, or tasks in PeopleSoft Change Management. For help desk cases, the assignment engine matches values for location, product, and product group. For both support cases and service orders, the assignment engine matches values for customer, site, region, product, and product group. For tasks in Change Management, the assignment engine matches values for location, department, either product or product group, and role.

Region

Enter the worker's region. The assignment engine matches the worker's region to the region on the service order or case.

Customer

If the worker can support the customer at any site, enter the customer and leave the Site field blank. You can also select a site without specifying a customer.

Product

The values for the Proficiency field depend on the product rating model that you specify for the setID when you set up the assignment engine.

Product Group

Enter the product groups that the worker supports and the setIDs of the product groups.

Location

Enter the worker's location and the location setID. The assignment engine matches the worker's location for change management tasks.

Department

Enter the worker's department and setID of the department.

Role

Enter the description of the worker's role. This is used to assign change management tasks to workers.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Setting Up and Performing Assignment Searches"

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Setting Up and Performing Assignment Searches," Reviewing and Assigning Group Members

Associating Workers with Provider Groups and Worklists

Access the Worker - Groups page.

Provider Group Membership			
SetID	Provider Group Name	Status	
IPROD	Complaint Services	Active	
IPROD	Contact Us	Active	
IPROD	Freezer/Refrigeration Support	Active	

Group Worklist Membership			
User ID	Group Worklist Name	Owner	
KU100	ComplaintServices-APP01		
KU100	Freezer/FridgeSupport-APP01		

Worker - Groups page

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Setting Up and Maintaining Provider Groups and Group Members”

Defining Default Storage Locations

Access the Worker - Storage Locations page.

*Location Type	*IN Unit	*Area	Level 1	Level 2	Level 3	Level 4	
Good							

Worker - Storage Locations page

Storage location information is required only for workers who perform field service activities. Material movement transactions that are initiated from the Manage Material page in PeopleSoft FieldService update quantities in the inventory storage locations that are associated with the lead technician on the service order line.

You must define one and only one good truck stock location and one and only one defective truck stock location for each field service worker. The good and defective locations can't have the same storage location definition—the area and up to four storage levels—in PeopleSoft Inventory or a third-party inventory system.

Location Type

Select the type of material location that is on the truck.

Good: The location for material that is used to complete a service request at a customer's site.

Defective: The location of material that was removed from a customer's site. Typically, the worker returns this stock to the central distribution center for inspection or scrap processing.

IN Unit (inventory unit)

Enter the identification of the inventory business unit with the material storage location that corresponds to the material location type that is on the worker's truck. You define the inventory business unit in PeopleSoft Inventory or a third-party inventory system and insert it in the CRM system by using the Business Unit EIP.

See [Chapter 17, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” page 299.](#)

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

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

Important! No prompts are available for the storage location definition fields Area, Level 1, Level 2, Level 3, and Level 4. Unlike business units, storage location information is not synchronized with an inventory system. You must know the correct storage location definitions to enter. Material movement transactions that are initiated from the Manage Material page are successfully recorded in the inventory system only if the storage location definition that you enter is a valid storage location for the inventory business unit that is referenced in the IN Unit field.

See Also

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

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

PeopleSoft Enterprise Inventory 9 PeopleBook

Defining Default Signatures

Access the Worker - Signature page.

In the Notification Signature field, enter the default signature that is used when someone sends manual notifications. When this person accesses the Send Notification page, this signature appears in the Message field.

Setting Up Foundational Data for Workers

To set up foundational data for workers, use the Location (LOCATION_TBL), Department (DEPARTMENT), Job Code (RB_JOB_CODE), and Cost Category (RF_COST_CAT) components.

This section discusses how to:

- Set up location codes.
- Set up department codes.
- Set up job codes.
- Set up cost categories.
- Set up competencies.

Note. In addition to worker-specific foundational data, worker records also reference general foundational data, such as setIDs, location codes, and salutation codes. For more information, refer to the table-loading sequence for the CRM application. You can find table-loading sequences for each product on the PeopleSoft Customer Connection web site.

See Also

[Chapter 17, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” page 299](#)

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

PeopleSoft Enterprise Components for CRM 9 PeopleBook

Pages Used to Set Up Foundational Data for Workers

Page Name	Object Name	Navigation	Usage
Location	LOCATION_TBL	Set Up CRM, Common Definitions, Location, Location	Set up location codes.
Department	DEPARTMENT	Set Up CRM, Common Definitions, Employee Data, Department, Department	Set up information about the organization’s departments.
Job Codes	RB_JOB_CODE	Set Up CRM, Common Definitions, Employee Data, Job Codes, Job Codes	Set up codes for the jobs in the organization.
Cost Categories	RF_COST_CAT	Set Up CRM, Common Definitions, Employee Data, Cost Categories, Cost Categories	Set up cost categories.
Worker Functions	RD_WRK_FUNC_TBL	Set Up CRM, Common Definitions, Employee Data, Worker Functions, Worker Function	Set up worker functions.
Competencies	COMPETENCY_TABLE	Set Up CRM, Common Definitions, Competencies, Competencies, Competencies	Set up competencies.

Setting Up Location Codes

Access the Location page.

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

Setting Up Department Codes

Access the Department page.

SetID CRM01	Department TEST	Location
Department Information Find View All First 1 of 1 Last		
*Effective Date	09/15/2008	*Status Active
*Description	Human Resource	
Short Description	HR	
Manager EmplID	<input type="text"/>	Manager Name <input type="text"/>

Department page

Note. Instead of entering information directly into CRM, you can maintain department codes in PeopleSoft HRMS or a third-party system and move the department data to CRM by implementing the Department Table EIP.

Setting Up Job Codes

Access the Job Codes page.

Job Codes		
SetID CRM01	Job Code SPT	
Job Code Description Find View All First 1 of 1 Last		
*Effective Date	05/21/2008	*Status Active
*Description	Customer Support	

Job Codes page

You can also maintain job codes in PeopleSoft HRMS or a third-party system and move the job code data to CRM by implementing the Job Code Table EIP.

Setting Up Cost Categories

Access the Cost Categories page.

Cost Categories

SetID CRM01

Cost Categories Customize | Find | View All |  First ◀ 1-6 of 6 ▶ Last

*Cost Category Code	*Description	Short Description	
AFTR	After Hours	After Hour	
DOUB	Double Time	Double	
HALF	Time and Half	1.5	
PAGER	Pager	Pager	
STRT	Straight Time	Straight	
TRAVL	Travel	Travel	

Cost Categories page

Setting Up Competencies

Access the Competencies page.

Competencies

Competency ID 1208

*Description Network Repair

Short Description NW Rpr

*Rating Model PSCM  Competency Management Scale

Comments Repair of IT Network

Competency Types Customize | Find |  First ◀ 1 of 1 ▶ Last

Type	Description	
HARDW 	Hardware and Networks	 

Competencies page

Worker competency information determines which workers are best qualified for assignment to a case or service order. CRM enables you to define competency information and associate it with workers by using competency codes. You can also maintain competency data in PeopleSoft HRMS or a third-party system and move the competency data to CRM by implementing the following EIPs: Competency Type, Rating Model, and Competency.

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

PART 5

Business Object Management

Chapter 13

Working with Predefined Business Object Search and Quick Create Data

Chapter 14

Using Business Object Search and Quick Create Functionality

Chapter 15

Setting Up Business Object Search and Quick Create

Chapter 16

Defining Ad Hoc Business Objects

CHAPTER 13

Working with Predefined Business Object Search and Quick Create Data

This chapter discusses the predefined system data that is used by the business object (BO) search and quick create process.

Understanding Delivered System Data for BO Search and Quick Create

This section discusses the following delivered system data:

- Field definitions.
- Quick create definitions and templates.
- Search roles.
- Search definitions.
- Criteria fields.
- Adapter definitions.

Delivered System Data

PeopleSoft Enterprise CRM delivers system data for business object searches and quick create definitions that are delivered as part of the PeopleSoft Enterprise CRM suite of products. Before defining new searches or quick create definitions, examine the delivered system data to fully understand the setup requirements.

See [Chapter 15, “Setting Up Business Object Search and Quick Create,” Understanding BO Search and Quick Create Setup, page 273.](#)

Field Definitions

This section provides a summary list of the fields that are provided by PeopleSoft Enterprise CRM. For more detail on how a field is defined in the system, access the Field page and search for the field description.

See [Chapter 15, “Setting Up Business Object Search and Quick Create,” Defining Fields, page 277.](#)

Field Description	Field Name	Role Types
Account	RBTACCTNO	<ul style="list-style-type: none"> • Contact (8) • Individual Consumer (9) • Account Owner (Individual) (65) • Account Owner (Organization) (66) • Account Owner (Rep.) (67) • Client (20012)
Account ID	RBTACCTID	<ul style="list-style-type: none"> • Contact (8) • Individual Consumer (9) • Sold To Organization (42) • Sold To Individual (46) • Account Owner (Individual) (65) • Account Owner (Organization) (66) • Account Owner (Rep.) (67) • Client (20012)
Address Address 1	CO_CONCAT ADDRESS 1	<ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
AGREEMENT ID	AGREEMENT_CODE	<ul style="list-style-type: none"> • Company (2) • Contact (8) • Individual Consumer (9)

Field Description	Field Name	Role Types
ATM Card	ATM_CARD_NO	<ul style="list-style-type: none"> • Contact (8) • Individual Consumer (9) •
Birthday	BIRTHDATE	<ul style="list-style-type: none"> • Contact (8) • Individual Consumer (9)
City	CITY	<ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
Company ID	COMPANYID	Partner (11)

Field Description	Field Name	Role Types
Country	COUNTRY	<ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
Created by	ROW_ADDED_OPRID	Worker(4)
Created Date	ROLE_START_DT	Worker(4)
Currency	CURRENCY_CD	<ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47)
Customer ID	CUST_ID	<ul style="list-style-type: none"> • Company (2) • Individual Consumer (9) • Partner (11)

Field Description	Field Name	Role Types
Department Name	DESCR	<ul style="list-style-type: none"> Worker (4) Person of Interest (88)
Email	CM_CONCAT	<ul style="list-style-type: none"> Worker (4) Contact (8) Individual Consumer (9) Account Owner (Individual) (65) Account Owner (Rep.) (67) Person of Interest (88)
Employee ID	EMPLID	<ul style="list-style-type: none"> Worker (4) Person of Interest (88)
Extension	EXTENSION	Worker (4)
Financial Account	FIN_ACCOUNT_ID	<ul style="list-style-type: none"> Contact (8) Individual Consumer (9)
First Name	FIRST_NAME	<ul style="list-style-type: none"> Worker (4) Contact (8) Individual Consumer (9) Ship To Individual (45) Sold To Individual (46) Bill To Individual (47) Person of Interest (88)
Last Name	LAST_NAME	<ul style="list-style-type: none"> Worker (4) Contact (8) Individual Consumer (9) Ship To Individual (45) Sold To Individual (46) Bill To Individual (47) Person of Interest (88)
Location Name	RC_LOC_DESCR	<ul style="list-style-type: none"> Worker Person of Interest (88)

Field Description	Field Name	Role Types
Name	BO_NAME_DISPLAY	<ul style="list-style-type: none"> • Person (1) • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88) • Organization (20008)
National ID	NATIONAL_ID	<ul style="list-style-type: none"> • Contact (8) • Individual Consumer (88) • Worker (4) • Person of Interest (88)

Field Description	Field Name	Role Types
Phone	CM_CONCAT	<ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
Physical Location	PHYSICAL_LOCATION	Worker (4)
PIN	PERSON_PIN	<ul style="list-style-type: none"> • Contact (8) • Individual Consumer (9)
Postal	POSTAL	<ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)

Field Description	Field Name	Role Types
Serial Number	SERIAL_ID	<ul style="list-style-type: none"> • Company (2) • Contact (8) • Individual Consumer (9)
Service Phone	RBTPHONENUMBER	<ul style="list-style-type: none"> • Contact (8) • Individual Consumer (9)
SIN	SIN	<ul style="list-style-type: none"> • Company (2) • Site (3) • Individual Consumer (9)
Site ID	SITE_ID	Site (3)
SSN/TIN	TIN	<ul style="list-style-type: none"> • Company (2) • Site (3) • Contact (8) • Individual Consumer (9) • Partnership (30) • Alternate Capacity (31)
State	STATE	<ul style="list-style-type: none"> • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Person of Interest (88)
Stock Symbol	STOCK_SYMBOL	Company (2)

Field Description	Field Name	Role Types
Suffix	NAME_SUFFIX	Worker (4) Contact (8) Individual Consumer (9) Ship To Individual (45) Sold To Individual (46) Bill To Individual (47)
TIN Type	TINTYPE	<ul style="list-style-type: none"> • Company (2) • Site (3) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31)

Quick Create Definitions and Templates

This section provides a summary list of the quick create definitions and quick create templates that are provided by PeopleSoft Enterprise CRM. For more detail on a quick create definition or quick create template, access the Quick Create or Quick Create Template page and search for the quick create definition or quick create template definition.

See [Chapter 15, “Setting Up Business Object Search and Quick Create,” Defining Quick Create Templates, page 281](#) and [Chapter 15, “Setting Up Business Object Search and Quick Create,” Setting Up Quick Create Definitions, page 283](#).

Quick Create Definition	Quick Create Template	
RC FSI Contact	RC FSI Consumer	
	RC FSI Consumer with Contact	
	The FSI Alt Capacity with Cont	The Company with Contact
	RC Person	The FSI Partnership with Cont The Company with Contact The Consumer The Consumer with Contact
RI Customer and Contact	The Company The Company with Contact The Company with Site (BC) The Consumer The Consumer with Contact The Consumer with Site (BC)	
RI Customer with Contact	The Company with Contact The Company with Site (BC) The Consumer with Contact The Consumer with Site (BC)	
RSF Company	The Company (BC)	
RSF Consumer	The Consumer (BC)	
The Bill To Company	The Bill To Company	
The Bill To Company and Cont	The Bill To Company	
	The Bill To Company with Cont	

Quick Create Definition	Quick Create Template
The Bill To Company with Cont	The Bill To Company with Cont
The Bill To Consumer	The Bill To Consumer
The Bill To Consumer and Cont	The Bill To Consumer
	The Bill To Consumer with Cont
The Bill To Consumer with Cont	The Bill To Consumer with Cont
The Bill To Customer	The Bill To Company
	The Bill To Consumer
The Bill To Customer and Cont	The Bill To Company
	The Bill To Company with Cont
	The Bill To Consumer
	The Bill To Consumer with Cont
The Bill To Customer with Cont	The Bill To Company with Cont
	The Bill to Consumer
	The Bill To Consumer with Cont
The Company	The Company
The Company (BC)	The Company (BC)
The Company and Contact	The Company
	The Company with Contact
The Company and Site	The Company
	The Company with Site (BC)
	The Site (ENG)
The Company with Contact	The Company with Contact
The Company with Site	The Company with Site (BC)
The Consumer	The Consumer
The Consumer and Contact	The Consumer
	The Consumer with Contact
The Consumer with Contact	The Consumer with Contact

Quick Create Definition	Quick Create Template
The Consumer with Site	The Company with Site (BC)
The Contact	The Contact
The Customer	The Company
	The Consumer
The Customer and Contact	The Company
	The Company with Contact
	The Consumer
	The Consumer with Contact
The Customer with Contact	The Company with Contact
	The Consumer
	The Consumer with Contact
The Customer with Site	The Company with Site (BC)
	The Consumer with Site (BC)
The FSI Alt Capacity	The FSI Alt Capacity
The FSI Alt Capacity with Cont	The FSI Alt Capacity with Cont
The FSI Company	The FSI Company
The FSI Company and Contact	The FSI Company
	The FSI Company with Contact
The FSI Company with Contact	The FSI Company with Contact
The FSI Consumer	The FSI Consumer
The FSI Consumer and Contact	The FSI Consumer
	The FSI Consumer with Contact
The FSI Consumer with Contact	The FSI Consumer with Contact

Quick Create Definition	Quick Create Template
The FSI Cust (Org) and Cont	The FSI Alt Capacity
	The FSI Alt Capacity with Cont
	The FSI Company
	The FSI Company with Contact
	The FSI Consumer
	The FSI Consumer with Contact
	The FSI Partnership
	The FSI Partnership with Cont
The FSI Cust (Org) with Cont	The FSI Alt Capacity with Cont
	The FSI Company with Contact
	The FSI Consumer
	The FSI Consumer with Contact
	The FSI Partnership with Cont
The FSI Customer	The FSI Alt Capacity
	The FSI Company
	The FSI Partnership
The FSI Partnership	The FSI Partnership
The FSI Partnership with Cont	The FSI Partnership with Cont
The FSI Site with Contact	The FSI Site with Contact
The OC Sold-To Cust and Contact	The Company with Site (BC)
	The Contact
	The Sold To Company
	The Sold To Company with Cont
	The Sold To Consumer
	The Sold To Consumer with Cont
The Ship To Company	The Ship To Company

Quick Create Definition	Quick Create Template
The Ship To Company and Cont	The Ship To Company
	The Ship To Company with Cont
The Ship To Company with Cont	The Ship To Company with Cont
The Ship To Consumer	The Ship To Consumer
The Ship To Consumer and Cont	The Ship To Consumer
	The Ship To Consumer with Cont
The Ship To Consumer with Cont	The Ship To Consumer with Cont
The Ship To Customer	The Ship To Company
	The Ship To Consumer
The Ship To Customer and Cont	The Ship To Company
	The Ship To Company with Cont
	The Ship To Consumer
	The Ship To Consumer with Cont
The Ship To Customer with Cont	The Ship To Company with Cont
	The Ship To Consumer
	The Ship To Consumer with Cont
The Site	The Site(ENG)
The Site with Contact	The Site with Contact
The Sold To Co. with Cont/Site	The Sold To Company
	The Sold To Company with Cont
	The Sold To Company with Site
The Sold To Company	The Sold To Company
The Sold To Company and Cont	The Sold To Company
	The Sold To Company with Cont
The Sold To Company with Cont	The Sold To Company with Cont
The Sold To Company with Site	The Sold To Company
	The Sold To Company with Site

Quick Create Definition	Quick Create Template
The Sold To Cons with Con/Site	The Sold To Consumer
	The Sold To Consumer with Cont
	The Sold To Consumer with Site
The Sold To Consumer	The Sold To Consumer
The Sold To Consumer and Cont	The Sold To Consumer
	The Sold To Consumer with Cont
The Sold To Consumer with Cont	The Sold To Consumer with Cont
The Sold To Customer	The Sold To Company
	The Sold To Consumer
The Sold To Customer and Cont	The Sold To Company
	The Sold To Company with Cont
	The Sold To Consumer
	The Sold To Consumer with Cont
The Sold To Customer with Cont	The Sold To Company with Cont
	The Sold To Consumer
	The Sold To Consumer with Cont
The Worker	The Worker
WM Client	WM Client

Search Roles

This section provides a summary list of the search roles that are provided by PeopleSoft Enterprise CRM. For more detail on how a search role is defined in the system, access the Search Role page and search for the role.

See [Chapter 15, “Setting Up Business Object Search and Quick Create,” Viewing Roles that Use a Search Field, page 279](#) and [Chapter 15, “Setting Up Business Object Search and Quick Create,” Associating Search Fields with a Role Type, page 283](#).

- 360 (COM) Company
- 360 (COM) Consumer
- 360 (COM) Cont of Company
- 360 (COM) Cont of Consumer
- 360 (ENG) Company

- 360 (ENG) Consumer
- 360 (ENG) Cont of Company
- 360 (ENG) Cont of Consumer
- 360 (FSI) Alternate Capacity
- 360 (FSI) Company
- 360 (FSI) Consumer
- 360 (FSI) Cont of Company
- 360 (FSI) Cont of Consumer
- 360 (FSI) Cont of Partnership
- 360 (FSI) Cont of Alt Cap
- 360 (FSI) Partnership
- 360 (GBL) Company
- 360 (GBL) Consumer
- 360 (GBL) Cont of Company
- 360 (GBL) Cont of Consumer
- 360 (GBL) Cont of Site
- 360 (GBL) Site
- 360 (INS) Consumer
- 360 (INS) Cont of Company
- 360 (INS) Cont of Consumer
- 360 Partner
- CDM Bill To Organization
- CDM Consumer with Cust ID
- CDM Contact
- CDM Copy Worker
- CDM Ship To Organization
- CDM Worker
- ERMS Consumer of Contact (DN)
- FS Company
 - FS Sold To Company
 - FS Sold To Consumer
- OC (COM/ENG) Company
- OC (COM/ENG) Consumer
- OC (COM/ENG) Cont of Sld To Co
- OC (COM/ENG) Cont of SldTo Con

- OC (COM/ENG) Sold To Co w/Prim
- OC (COM/ENG) Sold To Con
- OC Sold To Company
- RA Contact
- RA Worker (N)
- RB Recipient
- RB Representing
- RB Sender
- RC COM Consumer
- RC COM Contact of Company
- RC COM Contact of Consumer
- RC Company
- RC Company Site
- RC Consumer
- RC Consumer Site
- RC Consumer with PIN
- RC Contact (D)
- RC Contact of Alt.Capacity
- RC Contact of Company
- RC Contact of Company with PIN
- RC Contact of Consumer
- RC Contact of Consumer with PIN
- RC Contact of Partnership
- RC Contact of Site
- RC ENG Consumer
- RC ENG Contact of Company
- RC ENG Contact of Consumer
- RC FSI Consumer
- RC FSI Contact of Company
- RC FSI Contact of Consumer
- RC POI
- RC Site of Company
- RC Worker
- RC Worker Helpdesk
- RG Contact (N)
- RG Worker (N)

- RO Site
- RQ Contact (N)
- RQ Worker (N)
- RSF Client
- RSF Consumer
- RSF Contact
- RSF Contact of Company
- RSF Contact of Consumer
- RSF Partner
- RSF Worker (sales Rep)
- RV Account Owner (Ind)
- RV Account Owner (Org)
- RV Account Owner (Rep)
- RV Account Owner Company
- RV Account Owner Partnership
- RV Account Owner Person
- The Account
- The Account with Bill To (D)
- The Alt Capacity
- The Alt Capacity with Cust ID
- The Alt Capacity with Primary
- The Bill To Comp with Primary
- The Bill To Company
- The Bill To Cons with Primary
- The Bill To Consumer
- The Bill To Consumer (N)
- The Bill To Site
- The Company
- The Company of Contact (DN)
- The Company with Cust ID
- The Company with Primary
- The Consumer
- The Consumer (D)
- The Consumer (N)
- The Consumer of Contact (DN)
- The Consumer with Cust ID

- The Consumer with Primary
- The Contact
- The Contact of Account
- The Contact of Alt Cap
- The Contact of Alt Cap (D)
- The Contact of Bill To Comp
- The Contact of Bill To Comp (D)
- The Contact of Bill To Cons
- The Contact of Bill To Cons(D)
- The Contact of Company
- The Contact of Company (D)
- The Contact of Company (ND)
- The Contact of Company (NS)
- The Contact of Consumer
- The Contact of Consumer (D)
- The Contact of Consumer (ND)
- The Contact of Consumer (NS)
- The Contact of Partner
- The Contact of Partner (D)
- The Contact of Partner (ND)
- The Contact of Partner (NS)
- The Contact of Partnership
- The Contact of Partnership(D)
- The Contact of Ship To Comp
- The Contact of Ship To Comp(D)
- The Contact of Ship To Cons
- The Contact of Ship To Cons(D)
- The Contact of Site
- The Contact of Site (D)
- The Contact of Sold To Comp
- The Contact of Sold To Comp(D)
- The Contact of Sold To Cons
- The Contact of Sold To Cons(D)
- The Partner
- The Partner of Contact (DN)
- The Partner with Company ID

- The Partner with Primary
- The Partnership
- The Partnership with Cust ID
- The Person
- The Ship To Comp with Primary
- The Ship To Company
- The Ship To Cons with Primary
- The Ship To Consumer
- The Ship To Consumer (N)
- The Ship To Site
- The Site
- The Site of Company
- The Site of Company (D)
- The Site of Consumer (D)
- The Site of Consumer (N)
- The Site with Primary
- The Site with Site ID
- The Sold To Comp with Primary
- The Sold To Company
- The Sold To Cons with Primary
- The Sold To Consumer
- The Sold To Consumer (N)
- The Sold To Site
- The Worker
- The Worker (S Name)

Search Definitions

This section provides a summary list of the search definitions that are provided by PeopleSoft Enterprise CRM. For more detail on how a search is defined in the system, access the Search page and search for the search definition that is listed below.

See [Chapter 15, “Setting Up Business Object Search and Quick Create,” Defining BO Searches, page 287.](#)

- 360 BO all details (COM)
- 360 BO all details (ENG)
- 360 BO all details (FSI)
- 360 BO all details (GBL)
- 360 BO all details (INS)
- 360 Company (GBL)

- 360 Contact (COM)
- 360 Contact (ENG)
- 360 Contact (FSI)
- 360 Contact (GBL)
- 360 Organization (COM)
- 360 Organization (ENG)
- 360 Organization (FSI)
- 360 Organization (GBL)
- 360 Partner and Partner Cont
- 360 Partner Company
- 360 Person (COM)
- 360 Person (ENG)
- 360 Person (FSI)
- 360 Person (GBL)
- 360 Worker
- CDM Account Contact
- CDM Alt Capacity with Cust ID
- CDM Bill To Customer
- CDM Company with Cust ID
- CDM Consumer with Cust ID
- CDM Contact
- CDM Customer with Cust ID
- CDM Customer with Cust ID FSI
- CDM Partner
- CDM Partnership with Cust ID
- CDM Ship To Customer
- CDM Site
- CDM Worker
- CM Contact
- CM Contact of Company
- COM Company and Contact
- COM Contact
- COM Contact 2
- COM Contact Multiple
- COM Customer All Details
- ERMS ConfigSrchRecipient

- ERMS ConfigSrch Sender
- ERMS Contacts
- ERMS Customer and Partner
- ERMS Email - All (D)
- ERMS Email - External
- ERMS Email - External (D)
- ERMS Email - Partner
- ERMS Email - Partner (D)
- ERMS Search Contact
- ERMS Search Customer
- ERMS Worker and POI
- FS Company and Consumer
- FS Customer
- FS Customer All Details
- FS Modified Cust All Details
- FS Person
- FS Sold To
- FS Sold To Company and Cons
- FSI Customer
- FSI Customer and Contact
- OC (COM/ENG) Consumer
- OC (COM/ENG) Customer
- OC (COM/ENG) Sld to Prim
- OC (COM/ENG) Sold To Customer
- OC (ENG) Sold To Customer
- OC (FSI/INS) Customer
- OC Config Search Contact
- OC Sold To Company
- OC Sold To Customer
- RA Partner Contact
- RA Sponsor
- RA Sponsor no Partner
- RA Team
- RA Team no Partner
- RA Worker (N)
- RA Worker and Partner Contact

- RB Inbound Representing
- RB Inbound Sender
- RB Representing
- RB Representing QC
- RB Sender
- RB Sender QC
-
- RC COM Customer All Details
- RC COM Person
- RC COM Site and Person
- RC Company and Cons
- RC Company Site
- RC Company with Contact
- RC Config. Search Contact
- RC Contact
- RC Contact of Company
- RC Contact of Site
- RC Customer All Details
- RC ENG Customer All Details
- RC ENG Person
- RC ENG Site and Person
- RC FSI Account
- RC FSI Contact of Cust
- RC FSI Cust (Org) with Cont
- RC FSI Customer
- RC FSI Person
- RC Partner Contact
- RC Person
- RC Person PIN Prompt
- RC Person with PIN
- RC Site
- RC Worker
- RC Worker Helpdesk
- RG Worker
- RG Worker and Contact
- RI Config Search Contact

- RI Contact of Customer (D)
- RI Customer
- RI Customer All Details
- RO Site
- RQ Worker (N)
- RQ Worker and Contact (N)
- RSF Assigned To
- RSF Contact
- RSF Contact Consumer
- RSF Contact Search
- RSF Customer
- RSF Customer No QC
- RSF Partner with Cont Multi
- RSF Referred By
- RSF Site
- RSF Site no QC
- RSF Worker
- RV Account Owner (Ind)
- RV Account Owner (Org)
- RV Account Owner (Rep)
- RV Account Owner Company
- RV Account Owner Partnership
- RV Account Owner Person
- The Account
- The Account with Bill To
- The Account with Prim Bill To
- The Account with Sold To
- The Alternate Capacity
- The Bill To Comp and Primary
- The Bill To Comp with Primary
- The Bill To Company
- The Bill To Company with Cont
- The Bill To Cons and Primary
- The Bill To Consumer
- The Bill To Consumer with Cont
- The Bill To Cust All Details

- The Bill To Customer
- The Bill To Customer (no QC)
- The Bill To Customer with Cont
- The Bill To Person
- The Company
- The Company (No QC)
- The Company and Primary
- The Company with Contact
- The Company with Primary
- The Company with Site
- The Consumer
- The Consumer and Primary
- The Consumer with Contact
- The Consumer with Primary
- The Contact of Bill To Comp
- The Contact of Bill To Comp(C)
- The Contact of Bill To Cons
- The Contact of Bill To Cons(C)
- The Contact of Bill To Cust
- The Contact of Bill To Cust(C)
- The Contact of Company
- The Contact of Company (C)
- The Contact of Consumer
- The Contact of Consumer (C)
- The Contact of Customer
- The Contact of Customer (C)
- The Contact of Partner
- The Contact of Partner (C)
- The Contact of Ship To Comp
- The Contact of Ship To Comp(C)
- The Contact of Ship To Cons
- The Contact of Ship To Cons(C)
- The Contact of Ship To Cust
- The Contact of Ship To Cust(C)
- The Contact of Sold To Comp
- The Contact of Sold To Comp(C)

- The Contact of Sold To Cons
- The Contact of Sold To Cons(C)
- The Contact of Sold To Cust
- The Contact of Sold To Cust(C)
- The Customer
- The Customer (No QC)
- The Customer All Details
- The Customer and Partner
- The Customer with Cont (no QC)
- The Customer with Contact
- The FSI (Org) Person
- The FSI Contact of Cust (Org)
- The FSI Contact of Cust (Org)C
- The FSI Cust (Org) with Cont
- The FSI Customer (Org)
- The FSI Organization
- The FSI Person
- The Organization Person
- The Partner
- The Partner (no QC)
- The Partner and Primary
- The Partner with Contact
- The Partner with Primary
- The Partnership
- The Person
- The Ship To Comp and Primary
- The Ship To Comp with Primary
- The Ship To Company
- The Ship To Company with Cont
- The Ship To Cons and Primary
- The Ship To Consumer
- The Ship To Consumer with Cont
- The Ship To Cust All Details
- The Ship To Customer
- The Ship To Customer (no QC)
- The Ship To Customer with Cont

- The Ship To Person
- The Site
 - The Site of Company (C)
 - The Site of Consumer (C)
- The Sold To Comp and Primary
- The Sold To Comp with Primary
- The Sold To Company
- The Sold To Company with Cont
- The Sold To Cons and Primary
- The Sold To Consumer
- The Sold To Consumer with Cont
- The Sold To Cust All Details
- The Sold To Customer
- The Sold To Customer with Cont
- The Sold To Person
- The Worker
- The Worker (no QC)
- The Worker and Cons with Cont
- WM Client

Criteria Fields

This section provides a summary list of the criteria fields that are provided by PeopleSoft Enterprise CRM. For more detail on how a criteria field is defined in the system, access the Criteria page and search for the criteria description.

See [Chapter 15, “Setting Up Business Object Search and Quick Create,” Defining Search Criteria Fields, page 288.](#)

Criteria Description	Field
360 Degree View (COM)	First Name
	Last Name
	Customer ID
	Account
	Service Phone
	Phone
	Email
	Address
	City
	State
	Postal
	Country
360 Degree View (ENG)	Name
	First Name
	Last Name
	Customer ID
	Account
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
360 Degree View (FSI)	Name
	First Name
	Last Name
	Customer ID
	National ID
	Account
	Financial Account
	ATM Card
	Phone
	Email
	Address
	City
	State
	Postal
360 Degree View (GBL)	Name
	First Name
	Last Name
	Customer ID
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
360 Degree View (HRHD)	Employee ID
	First Name
	Last Name
	National ID
	City
	State
	Country
360 Degree View (INS)	Name
	First Name
	Last Name
	Customer ID
	National ID
	Account
	Financial Account
	Phone
	Email
	Address
	City
	State
	Postal
Country	
360 Degree View (ITHD)	Employee ID
	First Name
	Last Name
	Department Name

Criteria Description	Field
360 Degree View Partner	Name
	First Name
	Last Name
	Customer ID
	Phone
	Email
	Address
	City
	State
	Postal
	Country
CDM Bill To Customer	Name
	First Name
	Last Name
	Phone
	Email
	Customer ID
	Address
CDM Contact	First Name
	Last Name
	Phone
	Email
CDM Contact Company	Name
	Phone
	Email
	Customer ID
	Address

Criteria Description	Field
CDM Contact Customer	Name
	First Name
	Last Name
	Phone
	Email
	Customer ID
CDM Contact Customer FSI	Name
	First Name
	Last Name
	Phone
	Email
	Customer ID
CDM Person Partner	Name
	Phone
	Email
	State
	Postal
	Country
	Company ID
CDM Ship To Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	Customer ID

Criteria Description	Field
CDM Site	Name
	Address
	Phone
	Site ID
CDM Site Customer	Name
	First Name
	Last Name
	Phone
	Email
	Customer ID
CDM Site Customer FSI	Name
	First Name
	Last Name
	Phone
	Email
	Customer ID
CDM Worker	First Name
	Last Name
	Phone
	Email
	Person ID
	Employee ID
CDM Worker Asgmt Customer	Name
	First Name
	Last Name
	Phone
	Email

Criteria Description	Field
CDM Worker With Created Date	First Name
	Last Name
	Phone
	Email
	Person ID
	Employee ID
	Created By
	Created Date
CM Contact	First Name
	Last Name
	Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
COM Contact	Name
	Last Name
	First Name
	Phone
	Email

Criteria Description	Field
COM Contact2	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
COM Contact Multiple	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
COM Customer	Name
	First Name
	Last Name
	Address
	City
	State
	Country
	Postal
	Account
	Service Phone
COM Customer	Name
	First Name
	Last Name
	Address
	City
	State
	Country
	Postal
	Account
	Service Phone

Criteria Description	Field
COM Customer 2	Name
	First Name
	Last Name
	Address
	City
	State
	Country
	Postal
	Account
	Service Phone
COM Person	First Name
	Last Name
	Service Phone
	Email
	Address
	City
	State
	Postal
COM Sold To Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	Postal

Criteria Description	Field
ERMS ConfigSrch Recipient	Name
	First Name
	Last Name
	Email
	Address
ERMS ConfigSrch Representing	Name
	First Name
	Last Name
ERMS ConfigSrch Sender	First Name
	Last Name
ERMS Email	Name
	First Name
	Last Name
	Address
ERMS Email - External	First Name
	Last Name
	Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
ERMS Email - External Represnt	Name
	Phone
	Address
	City
	State
	Postal
	Country
ERMS Email - Internal	First Name
	Last Name
	Email
	Phone
	Employee ID
ERMS Email - Partner	First Name
	Last Name
	Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
ERMS Email — Partner Represent	Name
	Phone
	Address
	City
	State
	Postal
	Country
ERMS Search Contact	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
ERMS Search Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
ERMS Search Partner	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
ERMS Search Partner Contact	First Name
	Last Name
	Phone
	Email
	Address
	City
	Postal
	State
	Country

Criteria Description	Field
FS Config Search Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	Postal
	Country
FS Config Search Sold To Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	Postal
	Country
FS Contact of Customer	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
FS Contact of Sold To Customer	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
FS Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
FS Customer (No Contact)	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
FS Employee	Employee ID
	First Name
	Last Name
	Department Name
	Location Name
	Physical Location
	Phone
	Email
FS Partner	Name
	First Name
	Last Name
	Phone
	Email
	Address

Criteria Description	Field
FS Partner Company Contact	First Name
	Last Name
	Phone
	Email
	Address
FS Provider Group Customer	Name
	First Name
	Last Name
	Phone
	Email
FS Sold To Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
FS Sold To Customer (No Cont)	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
FS Sold To Customer (Split)	Name
	First Name
	Last Name
	Phone
	Email
FS Worker	First Name
	Last Name
	Department Name
	Location Name
	Phone
	Email

Criteria Description	Field
FSI Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	PIN
FSI Customer and Contact	Name
	First Name
	Last Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	PIN
FSI Person	First Name
	Last Name
	Address
	City
	State
	PIN
	Phone

Criteria Description	Field
OC (COM/ENG) Consumer	First Name
	Last Name
	Account
FSI (COM/ENG) Customer	Name
	Account ID
	First Name
	Last Name
	Phone
	Address
OC (FSI/INS) Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
OC Capture Partner Contact	First Name
	Last Name
	Phone
	Email
	Address

Criteria Description	Field
OC Contact of Partner	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
OC Contact of Sold To Customer	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
OC Order Capture Partner	Name
	First Name
	Last Name
	Phone
	Email
	Address

Criteria Description	Field
OC Sold To Cont (Config. Srch)	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
OC Sold To Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	Postal
	Country
RA Owner Partner Contact	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID

Criteria Description	Field
RA Owner Worker	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RA Owner Worker/Partner Cntct	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RA Partner Only	Name
	City
	State
	Postal
	Country

Criteria Description	Field
RA Recipient	Name
	First Name
	Last Name
	Email
	Address
	City
	State
	Postal
	Country
RA Recipient no Partner	Name
	First Name
	Last Name
	Email
	Address
	City
	State
	Postal
	Country
RA Sponsor	Name
	Last Name
	First Name
	Email
	Address
	City
	State
	Postal

Criteria Description	Field
RA Sponsor no Partner	Name
	Last Name
	First Name
	Email
	Address
	City
	State
	Postal
RA Team	Name
	First Name
	Last Name
	Email
	Address
	City
	State
	Postal
	Country
RA Team no Partner	Name
	First Name
	Last Name
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
RB Inbound Representing	Name
	First Name
	Last Name
RB Inbound Sender	Name
	First Name
	Last Name
	Email
RB Representing	Name
	Customer ID
RB Representing QC	Name
	Customer ID
RB Sender	First Name
	Last Name
	Phone
	Email
	Address
RB Sender QC	First Name
	Last Name
	Phone
	Email
	Address
RBC recipient search	Name
	First Name
	Last Name
	Email
	Address
RC Bill To Contact	Name

Criteria Description	Field
RC Bill To Customer	Name
	Last Name
	First Name
	Phone
	Email
	Address
	City
	State
	Country
RC COM Customer	Name
	First Name
	Last Name
	Address
	City
	State
	Country
	Postal
	Account
	Service Phone
RC Company Site	Name
	Address
	SIN

Criteria Description	Field
RC Config. Search Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	Postal
	Country
RC Contact	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
RC Contact Note	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
RC Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
	PIN
	SIN
	Serial Number
	Agreement ID

Criteria Description	Field
RC Customer (name split)	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
	PIN
	SIN
	Serial Number
	Agreement ID
RC Customer Note	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
RC Employee	Employee ID
	First Name
	Last Name
	Department Name
	Location Name
	Physical Location
	Phone
	Email
RC Employee Config.Search	Employee ID
	First Name
	Last Name
	Department Name
	Location Name
	Physical Location
	Phone
	Email
RC ENG Customer	Name
	First Name
	Last Name
	Address
	City
	State
	Country
	Postal
Account	

Criteria Description	Field
RC FSI Contact	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
RC FSI Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
	Account

Criteria Description	Field
RC GOV Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Country
RC HR Employee	Employee ID
	National ID
	First Name
	Last Name
	Department Name
	Location Name
	Physical Location
	Phone
	Email
	City
	State
	Country
	RC Partner
First Name	
Last Name	
Phone	
Email	
Address	

Criteria Description	Field
RC Person Config. Search	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
RC Person PIN	First Name
	Last Name
	PIN
RC Report Customer	Name
	First Name
	Last Name
	Address
RC Site	Name
	Address
	State
	City
	Country
	Postal

Criteria Description	Field
RG Employee	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RG Employee and Contact	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RG Owner	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RG Requester	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID

Criteria Description	Field
RI Customer	Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
RI Interaction View	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
	Customer ID

Criteria Description	Field
RI Person Config.Search	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
RO Site	Name
	Address
	City
	State
	Postal
	Country
	Site ID
RQ Employee	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID

Criteria Description	Field
RQ Worker and Contact	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RSF Assigned To	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
Country	
RSF Client	Salutation
	First Name
	Middle Name
	Last Name
	Suffix
RSF Contact Search	First Name
	Last Name
	Phone
	Address

Criteria Description	Field
RSF Customer No QC	Name
	First Name
	Last Name
	Phone
	Address
RSF Lead Import Customer	Name
	First Name
	Last Name
	Phone
	Address
RSF Partner	Name
	First Name
	Last Name
	City
	State
	Postal
	Country
RSF Partner Rep	Name
	First Name
	Last Name
	City
	State
	Postal
	Country

Criteria Description	Field
RSF Referred By (worker/cons)	First Name
	Last Name
	Phone
	Email
	Set ID
RSF Sales Contact	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	Postal
	State
Country	
RSF Sales Customer	Name
	First Name
	Last Name
	Phone
	Address
RSF Sales Customer No QC	Name
	First Name
	Last Name
	Phone
	Address

Criteria Description	Field
RSF Sales Rep (Worker)	First Name
	Last Name
	Phone
	Email
	Address
RSF Site	Name
	Address
	City
	State
	Postal
	Country
	Site ID
RSF Site no QC	Name
	Address
	City
	State
	Postal
	Country
	Site ID
The Alt Capacity	Name
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
The Bill To Company	Name
	Address
	City
	State
	Postal
	Country
The Bill To Consumer	First Name
	Last Name
	Email
	Phone
	Address
	City
	State
	Postal
	Country
The Company	Name
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
The Consumer	First Name
	Last Name
	Email
	Phone
	Address
	State
	City
	Postal
	Country
The Contact	First Name
	Last Name
	Email
	Phone
	Address
	City
	State
	Postal
	Country
The Contact of Partner (C)	First Name
	Last Name
	City
	State
	Postal
	Country

Criteria Description	Field
The Partner	Name
	First Name
	Last Name
	City
	State
	Postal
	Country
The Partnership	Name
	Address
	City
	Country
	State
	Postal
The Person	First Name
	Last Name
	Email
	Phone
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
The Ship To Company	Name
	Address
	City
	State
	Postal
	Country
The Ship To Consumer	First Name
	Last Name
	Email
	Phone
	Address
	City
	State
	Postal
	Country
The Site	Name
	Address
	City
	State
	Postal
	Country
	Phone
	Site ID

Criteria Description	Field
The Site of Company (C)	Name
	Address
	Phone
	State
	Postal
	Country
	Phone
	Site ID
The Site of Consumer (C)	Name
	Address
	Phone
	State
	Postal
	Country
	Phone
	Site ID
The Sold To Company	Name
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
The Sold To Consumer	First Name
	Last Name
	Email
	Phone
	Address
	City
	State
	Postal
	Country
The Worker	First Name
	Last Name
	Email
	Employee ID
	Person ID
	Phone
WM Client	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal

Adapter Definitions

This section provides a summary list of the adapter definitions that are provided by PeopleSoft Enterprise CRM. For more detail on how each adapter is defined in the system, access the Adapter page and search for the adapter description.

See [Chapter 15, “Setting Up Business Object Search and Quick Create,” Defining Fields for Transaction Subpages, page 291](#) and [Chapter 15, “Setting Up Business Object Search and Quick Create,” Specifying Basic Search Criteria Fields, page 290](#).

- 360 Communication
- 360 Energy
- 360 Financial Services
- 360 Global
- 360 HRHD
- 360 Insurance
- 360 ITHD
- 360 Partner
- CDM Alternate Capacity
- CDM Company
- CDM Partner
- CDM Partner Distributed Sec
- CDM Partnership
- CDM Person
- CDM Relationship Viewer
- CDM Service Location
- CDM Site
- CDM Worker
- CDM Worker Copy
- CDM Worker Create
- CM Call Report
- CM Contact Group
- CM Task Detail
- COM Account
- COM Account Member
- ERMS ConfigSrch Inbound Email
- ERMS ConfigSrch Outbound Email
- ERMS Email - External
- ERMS Email - Internal
- ERMS Email - Partner
- ERMS Outbound Email
- ERMS Search HelpDesk Case
- ERMS Search OrderCaseSale etc
- ERMS Search Recipient

- ERMS Search Service Order
- FS Agreement External Create
- FS Agreement External Update
- FS Agreement Internal
- FS Agreement Search
- FS Dashboard
- FS Dispatch Performance
- FS Expenses by Customer
- FS Installed Asset
- FS Installed Asset Search
- FS Installed Product Create
- FS Installed Product Search
- FS Installed Product Update
- FS Material Orders Search
- FS Material Orders TechSearch
- FS Mean Time to Repair
- FS My Service Order
- FS My Service Order Search
- FS Provider Group
- FS Review PM Search
- FS Service Order Aging
- FS Service Order Create
- FS Service Order Search
- FS Service Order Update
- FS Set Up Tree
- FSI Access Trace Search
- FSI Billing Account
- FSI Financial Account Search
- FSI Modify Account
- FSI Review Modify Account
- FSI Security Matrix Search
- GBL Map Dashboard
- INS Financial Account Search
- OC (COM/ENG) Customer
- OC (FSI/INS) Customer
- OC Customer Srch (Search Page)

- OC Order Capture
- OC Order Capture (PARTNER)
- OC RX Site
 - PIM Search OrderCaseSale etc
 - PIM Synched Email - External
- RA Audience
- RA Marketing
- RA Marketing Calendar
- RA Marketing Content
- RA Marketing no Partner
- RA Marketing Offers
- RA Marketing Partner
- RA Mkt Calendar no Partner
- RBC Correspondence Search
- RC Case Related Cases Search
- RC Case Search
- RC Communications
 - RC Energy
- RC Financial Services
- RC Government
- RC Helpdesk
- RC HRHelpdesk
- RC Report Case by Age
- RC Report Cases by Customer
- RC Report Cases by Priority
- RC Report Dashboard
- RC Report Service Level Mgmt
- RC RMA
- RC Support
- RG Change Management
- RI Interaction List Search
- RI Interaction Personalize
- RQ Quality Defects
- RQ Quality Defects Setup
- RQ Quality Fixes
- RSF Leads

- RSF Opportunity
- RSF Sales Lead Import Results
- RSF Search Leads
- RSF Search Opportunities
- RSF Search Referrals
- RY Dialogs Marketing Objects
- RY Dialogs no Partner
- RY Dialogs Partner
- WM Asset/Liability
- WM Client at Risk
- WM Client Relationship
- WM Household Mem'ber
- WM Product of Interest

CHAPTER 14

Using Business Object Search and Quick Create Functionality

This chapter provides an overview of the business object search and quick create process and discusses how to:

- Search for business objects.
- Create business objects by using the Quick Create component.

Understanding the Business Object Search and Quick Create Process

This section discusses:

- Business object search.
- Customer identification.
- Quick create functionality.
- BO search and Quick Create runtime example.

Business Object Search

When users create a transaction in PeopleSoft Enterprise CRM and do not know the specific value for a business object that the transaction uses, they can invoke a business object search to find the field value. The system determines the information that is needed depending on the page where the business object search was initiated and searches for the business object.

If the business object is not uniquely identified from the information that the user enters, a search page that contains both a list of objects that are potential matches and additional search fields appears.

See Also

[Chapter 13, “Working with Predefined Business Object Search and Quick Create Data,” page 183](#)

[Chapter 14, “Using Business Object Search and Quick Create Functionality,” Identifying Customers for Transactions, page 266](#)

[Chapter 15, “Setting Up Business Object Search and Quick Create,” Adding and Modifying BO Search and Quick Create Definitions, page 275](#)

Customer Identification

The customer identification framework uses business object search to provide an easy and consistent way to identify the customer—company, partner, consumer, contact, or site—for a transaction.

Each transaction page has one or more subpages that contain the fields for entering customer, contact, and other information such as phone, site, identification number, or account number.

The subpages that appear and fields that appear on each subpage vary depending on the information that each transaction needs. For example, the customer information fields for order capture are Customer, First Name, and Last Name while the fields for creating a support case are Company, First Name, Last Name, and SIN (Service Identification Number). The customer information subpage might have one or two columns, depending on the needs of the page layout. Additional subpages might appear with partner information or worker information.

The user enters information in one or more fields and initiates a search. If a business object that uniquely matches the criteria that are entered is found, it is returned to the customer information subpage. If not, a page containing additional search criteria and a list of potential matches appears. The user can:

- Select a record.
- Refine the search criteria and search again.
- Create a new object using quick create.

Quick Create Functionality

The quick create functionality in PeopleSoft Enterprise CRM enables users to create business objects quickly and easily without navigating to the business object components. This functionality is available either from within a PeopleSoft Enterprise CRM application or by using the standalone Quick Create component.

Quick create definitions that are set up in the system and associated with transactions enable users to enter the subset of business object information that is required to define a business object and save it to the database. The business object information that is created is returned to the application so that the business process can continue. Some quick create definitions are set up to create more than one business object and the relationships between the business objects at the same time. For example, the *The Company with Contact* definition creates both a company and a contact.

You access the Quick Create component:

- As a standalone component by selecting Customers CRM.
- From the business object search page within a PeopleSoft Enterprise CRM transaction.
- Directly from a PeopleSoft Enterprise CRM application component, such as the Create Order transaction.

BO Search and Quick Create Runtime Example

For example, a call center agent might receive a call from a contact named Larry Hill who represents a customer company named MMA Property Management. The agent opens a case and searches for a company name of MMA with a last name of Hill.

If the information that the agent enters does not uniquely identify a customer and contact, the advanced search page appears. This page contains both expanded search criteria fields and a search results section that lists all companies whose name begins with the letters MMA that are represented by a contact with a last name of Hill. The agent can then:

- Select the correct company and contact combination.

- Enter additional search criteria, and search again.
- Define a new company with contact.

This option uses the quick create feature.

BO Search System Processing

The following tasks occur without the user being aware of them:

- The transaction adapter determines, based on the transaction, what fields appear on the customer information subpage and the criteria definition that defines the advanced search page.
- The criteria definition determines what criteria fields appear on the advanced search page, how they appear, and the search definitions to invoke.
- The search definition determines the roles to search for the criteria fields, the fields that appear in the search results, how the search results appear, and the quick create definition that the user accesses to create a new business object.
- For each role that is searched, the search role determines the security that is applied, the relationships for the role, and whether fields appear in the search criteria or results that are set for the role.
- The field definitions determine how the search fields appear on the page, the database records that are searched for each field, and how the user can search for the field.

Quick Create System Processing

The following tasks occur without the user being aware of them:

- The quick create definition determines which quick create templates to display to the user.
- The quick create template definitions determine both the fields that appear on the quick create page and the criteria that are used to search for existing objects of the type that is defined.

See Also

[Chapter 13, “Working with Predefined Business Object Search and Quick Create Data.” Understanding Delivered System Data for BO Search and Quick Create, page 183](#)

Searching for Business Objects

This section discusses how to:

- Identify customers for transactions.
- Search for business objects.

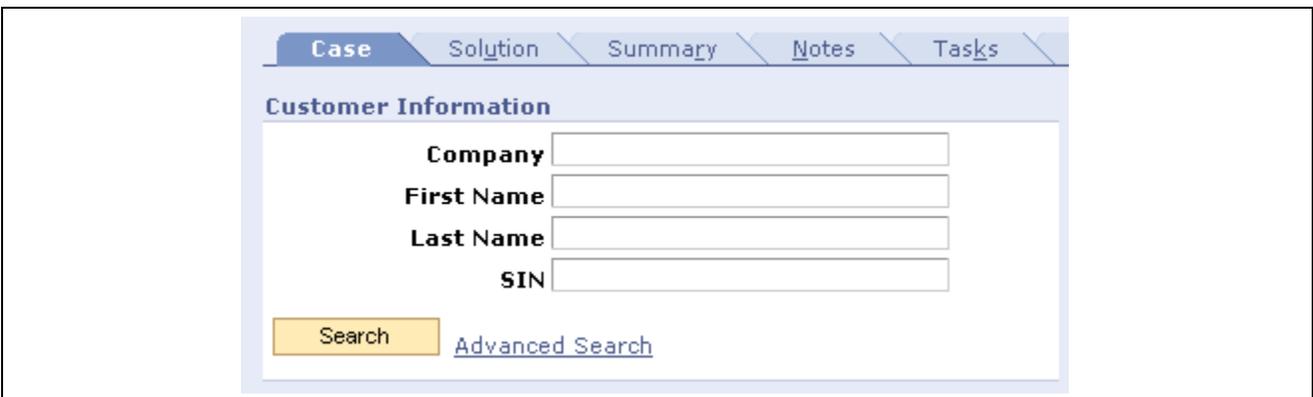
Pages Used to Search for Business Objects

Page Name	Object Name	Navigation	Usage
Search For <object>	RBQ_BOSRCH	<ul style="list-style-type: none"> Customers CRM, Business Object Search Enter customer information in any Customer Information group box on a transaction. Click the Advanced Search link on any page that is enabled for BO search. Click the search icon  next to any field on a PeopleSoft Enterprise CRM component or on transaction pages that are enabled for BO search. 	Search for a business object in the PeopleSoft Enterprise CRM database.

Identifying Customers for Transactions

Access the customer information subpage on any transaction that is enabled for customer identification.

Note. The example shown is from the Add Case component. The fields that appear in the Customer Information page region are specific to Case searches. Other components that use this feature function similarly, although the fields might vary.



Case page

Enter any information that you know and click Search. If the customer is not uniquely identified by the information that you enter, an advanced search page appears. You can also click the Advanced Search link to access the Search for <object> page.

Advanced Search

When you initiate the advanced search, the Search for <object> page appears. This page enables you to refine the search fields that you enter on the customer information subpage. This page contains additional search criteria and, depending on how the search criteria are set up, a link that accesses a quick create page to create a new business object or objects.

Searching for Business Objects

Access the Search For <object> page.

Search For Customer

▼ Search

Name begins with

First Name begins with

Last Name begins with

Customer ID begins with

Phone =

Email =

Address begins with

City =

State =

Postal =

Country =

Select Action

Search Results

Last Name	First Name	Name	Consumer	Phone	Email	Address 1	City
Hill	Kelly		Larry Hill	925/694-7811	khill@hill.com	4440 Rosewood Dr	Pleasanton
Hill	Larry			925/874-8965	larryhill@yahoo.com	147 Creekside Drive	Dublin
Hill	Larry	Sparkle Clean Laundromats		925/874-8965	larryhill@yahoo.com	147 Creekside Drive	Dublin
Hills	Nancy	Greenberg Financial					

Search For Customer page

This page is identical to the advanced search pages that appear for customer identification. This page contains additional search criteria. In the example above, the user can create a new company with a contact.

Select Action

Select a listed action and click Go to access a Quick Create page where you can create a new business object of the type for which you are searching.

This field appears only if the quick create option is defined for the business object search that you initiated. The available actions are also determined by the business object search definition. If there is only one quick create option defined for the search, then a link to the Quick Create page appears.

Search Results

If more than one business object meets the search criteria, the Search Results grid appears. The results are either:

- Single-select.

With single-select, one and only one business object can be returned from the search. The results appear in a list with each item identified as a link. When you click the link, the item is returned to the field from which the search was initiated.

- Multi-select.

With multi-select, more than one business object can be returned from the search. A check box appears next to each item. You select the desired items or click the Check All/Clear All link, then click the Select button to return the items to the calling page, where they appear in a grid.

Creating Business Objects by Using the Quick Create Component

This section discusses how to create business objects by using quick create functionality.

Note. The functionality of the Quick Create page is flexible and enables you to create as many business objects as you want without leaving the page.

Page Used to Create Business Objects by Using Quick Create Functionality

Page Name	Object Name	Navigation	Usage
Create <quick create definition name>	RBQ_QCREATE	<ul style="list-style-type: none"> • Customers CRM, Quick Create, Quick Create • Click the link or Go button next to the Create New field on the business object lookup page. • Click the Create New button on a PeopleSoft Enterprise CRM application page. 	Create business objects.

Creating Business Objects by Using Quick Create Functionality

Access the Create <quick create definition name> page.

Create Company with Contact

***SetID**

Company

[Search Existing Company](#)

***Name**

***Currency**

Contact Info

***Description**

Phone

*Type	Country Code	Number	Ext/PIN
Main <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Cellular <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
FAX <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Pager <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Email

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

Address

[Look up Address](#)

***Type**

Physical Location

***Country**

Address 1

Address 2

Address 3

City

County

State

Postal

Time Zone

Region

Create Company with Contact page (1 of 2)

Contact

[Search Existing Contact](#)

Format for

Prefix

***First Name**

***Last Name**

Middle Name

Suffix

Contact Info

***Description**

Phone

*Type	Country Code	Number	Ext/PIN
Main	<input type="text"/>	<input type="text"/>	<input type="text"/>
Cellular	<input type="text"/>	<input type="text"/>	<input type="text"/>
FAX	<input type="text"/>	<input type="text"/>	<input type="text"/>
Pager	<input type="text"/>	<input type="text"/>	<input type="text"/>

Email

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

Address

Use Company Address

[Look up Address](#)

***Type**

Physical Location

***Country**

Address 1

Address 2

Address 3

City

County

State

Postal

Time Zone

Region

Create Company with Contact page (2 of 2)

The preceding quick create page is for the Company with Contact definition. This section discusses the common features that are on all quick create pages.

- SetID** Enter the setID for the objects that you are creating. This field appears only for objects that are controlled by a setID and is defined on the quick create definition.
- Search Existing <object>** Click this link to search for existing business objects that match the information that you entered. For example, if you enter a company name of *MMA*, you can search for existing companies whose names start with MMA. This helps to ensure that you do not enter duplicate data.
- Clear** Click to clear the section of the Quick Create page.

Quick Create Process upon Save

When you save the Quick Create page, the system:

1. Verifies that all *required* fields are present.
If not, then the system returns an error message.
2. Creates the business object for each role that is present on the Quick Create page that has data.
For example, if the Quick Create page enables you to create a company and contact, but entering a contact is optional, then you can create a company without a contact. The contact is created only if you also enter contact data.

3. Creates the relationship between multiple roles if the information for these roles is present and the relationship between these roles is set up in the quick create template.

For example, if the quick create template enables you to create a company and a contact for the company at the same time, and also has a relationship set up between the two roles on the template, then when you enter the different roles and their information on the Quick Create page, both the company and the contact are created and the contact is linked to the company.

4. Returns newly created data to the calling application if you access the Quick Create page from a PeopleSoft Enterprise CRM application.

If you are in the standalone Quick Create component, then you remain on the Quick Create page after you save.

CHAPTER 15

Setting Up Business Object Search and Quick Create

This chapter provides an overview of the business object (BO) search and quick create definition process and discusses how to define BO searches and quick create pages.

Understanding BO Search and Quick Create Setup

This section lists common elements and discusses:

- BO search runtime process.
- Quick create runtime process.
- BO search and quick create setup process.

Common Elements Used in this Chapter

Field

Search fields are common objects that are used in BO search and quick create definitions. A field definition specifies the location of the field in the database, how the system searches for the field, the label of the field on the user interface, and how the field is updated by quick create.

Fields are used in the following BO search and quick create elements:

- Search roles.
- Search definitions.
- Search criteria.
- Transaction adapter.
- Quick create templates.

Quick Create Template

A quick create template associates the fields that are entered with the business object roles that are updated when a user creates a business object using quick create. The criteria definition specifies the search criteria page on which quick create definitions that this template is associated with appear.

Quick Create Definition

A quick create definition is composed of one or more templates that appear to the user when the quick create definition is invoked. You can use the same quick create template in more than one definition.

Search Role	<p>A search role definition associates field definitions to one or more role type. When user search for a field, only business objects that have a role that is associated with the field are returned in the search results.</p> <p>Search roles are used in search definitions.</p>
Search Definition	<p>A search definition is a collection of search roles and quick create definitions. Search definitions specify the roles and fields that are searched for data that a user enters. If you specify a quick create definition on the search definition, then the quick create definition is enabled on the search results page.</p> <p>You use search definitions in search criteria.</p>
Search Criteria	<p>Search criteria specify the search definitions that are invoked when the user enters data in certain fields on a component. You can specify a default search definition and up to four alternate definitions. You then select fields and associate each field with one or more search definitions. If you do not select a search definition for the field, then the default search definition is used.</p> <p>You associate criteria definitions with adapter sections.</p>
Adapter	<p>The adapter specifies the BO search definitions and quick create definitions that are enabled for a particular component or transaction. The adapter also defines the fields that appear in basic search mode, the search criteria to invoke for these fields, and the subpages of the component upon which these fields appear. Adapter sections are embedded into CRM applications.</p>

BO Search Runtime Processes

PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) provides the capability for users to search for business objects that they need to reference on transactions or components. When users don't know the exact name of the business object to reference, they can initiate a BO search to find the business object based on any information that they might know. The system determines the information that it requires to locate the BO and presents a search page for the user to enter known information.

The customer identification framework also uses BO search technology without the user having to explicitly initiate a search.

When a user searches for an object that does not already exist in the system, some PeopleSoft Enterprise CRM transactions provide quick create functionality that enables the user to create that object with a minimum set of data. For example, when a contact calls for service on behalf of a company, the customer service representative (CSR) verifies the contact's information by doing a BO search for the contact. If the contact is not found in the database, the CSR can create a contact immediately and associate it to the company.

BO search and quick create functions are tightly integrated with each other, and they use much of the same system data.

See Also

[Chapter 14, "Using Business Object Search and Quick Create Functionality," Understanding the Business Object Search and Quick Create Process, page 263](#)

[Chapter 14, "Using Business Object Search and Quick Create Functionality," Identifying Customers for Transactions, page 266](#)

BO Search and Quick Create Setup

This is the BO search and quick create setup process:

1. Define search fields.
2. Define quick create templates.
3. Enter a quick create definition.
4. Define search roles.
5. Enter a search definition.
6. Define search criteria.
7. Define the BO search and quick create adapter.

Note. Setting up BO search and quick create definitions requires a good understanding of roles and relationships in the system.

See Also

[Chapter 2, “Understanding Business Object Relationship Model Components,” Business Object Relationship Modelling, page 7](#)

Delivered Definitions

PeopleSoft Enterprise CRM delivers a robust set of predefined system data that meets most business requirements. Search the delivered definitions before attempting to modify or add new business object search or quick create definitions. To search the delivered definitions, access the setup component for that definition and run a search without entering search criteria. A list of all defined items appears.

Important! PeopleSoft does not support changes that you make to the search definitions delivered with PeopleSoft Enterprise CRM. Implementation of any new search definitions that you create requires a coding effort, which is also not supported by PeopleSoft.

See Also

[Chapter 13, “Working with Predefined Business Object Search and Quick Create Data,” page 183](#)

Adding and Modifying BO Search and Quick Create Definitions

This section discusses how to:

- Define fields.
- Define roles for a field.
- Define quick create templates.
- Define relationships for a template.
- Set up quick create definitions.
- Associate search fields with a role type.

- Define BO searches.
- Define search criteria fields.
- Specify basic search criteria fields.
- Define fields for transaction subpages.

Pages Used to Add or Modify Search Definitions

Page Name	Object Name	Navigation	Usage
Field	RBQ_FLDDFN	Set Up CRM, Common Definitions, Customer, BO Search, Field, Field	Define a field that is used in BO Search and quick create definitions.
Role	RBQ_FLDDFN_RL	Set Up CRM, Common Definitions, Customer, BO Search, Field, Role	View the roles that use the field definition. Each role that uses the field definition can override certain information that is defined for the field.
Search Record	RBQ_FLDDFN_REC	Set Up CRM, Common Definitions, Customer, BO Search, Field, Search Record	Specify characteristics of the record that is searched.
Template	RBQ_QCTMPL	Set Up CRM, Common Definitions, Customer, BO Search, Quick Create Template, Template	Define a quick create template. This defines the business object roles that appear on the Quick Create page when quick create is initiated from a specific component.
Relationships	RBQ_QCTMPL_REL	Set Up CRM, Common Definitions, Customer, BO Search, Quick Create Template, Relationships	Define the relationships between the roles defined on the quick create template.
Quick Create	RBQ_QCDFN	Set Up CRM, Common Definitions, Customer, BO Search, Quick Create, Quick Create	Set up a quick create definition and associate one or more quick create templates to it.
Search Role	RBQ_SRCHRL	Set Up CRM, Common Definitions, Customer, BO Search, Search Role, Search Role	Associate search fields with a role type.
Search	RBQ_SRCHDFN	Set Up CRM, Common Definitions, Customer, BO Search, Search, Search	Define a BO search with one or more search roles, search fields, and related BOs.
Criteria	RBQ_CRITDFN	Set Up CRM, Common Definitions, Customer, BO Search, Criteria, Criteria	Specify the advanced search criteria fields and advanced search definition.

Page Name	Object Name	Navigation	Usage
Adapter	RBQ_ADPTR	Set Up CRM, Common Definitions, Customer, BO Search, Adapter, Adapter	Specify the basic search criteria fields.
Sections	RBQ_ADPTR_SECT	Set Up CRM, Common Definitions, Customer, BO Search, Adapter, Sections	Define the records and fields that appear on transaction subpages.
Labels	RBQ_ADPTR_LBL	Set Up CRM, Common Definitions, Customer, BO Search, Adapter, Labels	Define labels.

Defining Fields

Access the Field page.

Field
Role
Search Record

General Options

Save As

*Field Name/Label

Field

Secondary Field

Default

Alternate Character Field

Is Alternate Character Field

Mapping Reference

Field Upper

Secondary Field Upper

Parser

Is Related Language Field

Is Name Field

Display Options

Display Field

Use Translate Values

Display as Checkbox

Lookup Record

Lookup Field

Search Operators

*Default Operator

Allow Equals

Allow Not Equal

Allow Begins With

Allow Contains

Allow Greater Than

Allow Greater Than or Equal

Allow Less Than

Allow Less Than or Equal

Quick Create Keystokes

Name Field

Contact Info Field

Field page

The purpose of a field definition is to ensure that the same value is propagated across different BO search and Quick Create definitions. If the field is constrained by role type, the value is propagated across only the definitions for this role type. For example, the value that is entered on a transaction is propagated to the search criteria then to the Quick Create template. Field definitions are referenced either directly or indirectly in all BO Search and Quick Create definitions.

A field definition specifies:

- The location of the field in the database.
- How the system searches for the field.
- The label of the field on the user interface.
- How Quick Create updates the field.

General Options

The system uses the values you enter in this region to format the BO search and Quick Create pages for the field, to process values that are entered for the field, and to compare entries against the database for duplicates.

Field Name/Label	Enter text that appears for the field on the user interface. The text appears both as a search criteria value that the user can select and as a column in the list of results returned by the search.
Mapping Reference	Enter the name that is used by the adapter to refer to the field in the component buffer.
Field and Secondary Field	Enter the names of the fields that the system searches for values that the user enters at runtime. The system searches the secondary field only if it doesn't find a match in the first field entered.
Field Upper and Secondary Field Upper	For fields of data type String, enter the names of the upper case fields that corresponds to the Field and Secondary field. This significantly improves performance when not using a case sensitive search.
Default	Select <i>Country</i> , <i>Currency</i> , <i>Language Code</i> or <i>SETID</i> . If selected, the corresponding value that is specified in the preferences for the user is inserted into the record at runtime by default.
Parser	Select the method to use to convert data that is entered in the field. For example, <i>Unformatted</i> converts (925) 694-44249 into 9256944249.
Alternate Char Field	Select the alternate character field that is appears when the user ID is enabled for alternate character. See <i>PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook</i> , "Implementing Alternate Character".
Is Related Language Field	Select to force translation of the field values to the user's language if the user is logged on with a language other than the base language.
Is Alternate Character Field	Select to indicate that the field is alternate character-enabled.
Is Name Field	Appears for the Name field definition only and is selected by default. You cannot deselect this option, nor can you add it to other field definitions. The Name field identifies the business object. The Is Name Field indicator facilitates processing by keeping the business object name in memory.

Display Options

The entries in this page region control how the field appears on pages at runtime.

Display Field	Enter the name of the field that is used to display the values at runtime.
----------------------	--

Lookup Record	Enter the record from which the system retrieves the values to populate a drop-down list.
Lookup Field	Enter the field from which the system retrieves the values to populate a drop-down list.
Use Translate Values	Select to have the system use a translate table to obtain the field value that appears at runtime.
Display as Checkbox	Indicate that this field appears as a check box for display and entry. The <i>Y</i> and <i>N</i> values in the field are translated at runtime into the appropriate check box property (selected or not selected).

Search Operators

Select the default search operator and the search operators that are visible to the user when this field is searched.

Quick Create Keystrokes

Select the quick create field name(s) to which the field maps. If the field is entered as search criteria, and the search is unsuccessful, then system pre-populates the quick create field with the value that was entered as a search field.

Viewing Roles that Use a Search Field

Access the Role page.

*Role Type	Label	Property Name		
Person	Sender		+	-
Company	Company		+	-
Site	Site		+	-
Worker	Employee		+	-
Contact	Contact		+	-
Individual Consumer	Consumer		+	-
Partner	Partner Company		+	-
Partnership	Partnership		+	-
Alternate Capacity	Alternate Capacity		+	-
Ship To Organization	Ship To Company		+	-
Sold To Organization	Customer		+	-
Bill To Organization	Bill To Company		+	-
Ship To Individual	Ship To Consumer		+	-
Sold To Individual	Sold To Consumer		+	-
Bill To Individual	Bill To Consumer		+	-
Person of Interest	Employee		+	-
Organization	Representing		+	-

Role page

Use this page to indicate different role options for search fields. If the field is used by different role types, you can specify a different label to appear next to the field for each different role type. You can also specify a different property that is set for each role. The specifications you make on this page override the ones that you made on the Field page.

Role Type Select a role type that is valid for this field. The system uses the role type to identify objects for which the field can be used as search criteria.

Property Name Select a property name for this role. Quick create updates the property with the value that users enter in the corresponding field when they create a new business object using quick create functionality.

Specifying Search Records

Access the Search Record page.

Role Type	*Search Record	Search By Role	Search By Rel	Bypass Status	Secure		
	BO_NAME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-

Search Record page

This page enables you to define how searches for role-specific fields are performed.

- Role Type** Enter the role type to which the search options apply. If no role type is entered, the options on this line apply to all role types.
- Search Record** Enter the name of the database record where BO Search looks for the field to display.
- Search By Role** Select search only views that contain both the BO_ID (business object identifier) and ROLE_TYPE_ID (role type identifier) fields.
- Search By Rel(Search By Relationship)** Select to search only views that contain both a BO_ID_1 and BO_ID_2 field.
- Bypass Status** Select to search all values of the contact information. If this check box is not selected, only the current values for all fields in the contact record are searched.

Defining Quick Create Templates

Access the Template page.

The screenshot shows the 'Quick Create Template' configuration interface. It features a 'Template' tab and a 'Relationships' tab. The main form area includes the following sections:

- Template Fields:**
 - *Description:** The Company with Contact
 - Label:** Company with Contact
 - *Market:** Global
- Role Options:**
 - Role Type:** Company
 - Label:** Company
 - Criteria:** The Company
 - Include Purchasing Options
- Purchasing Options:**
 - Sold To Customer
 - Bill To Customer
 - Ship To Customer
 - Include Contact info Entry
- Field Selection Table:**

Field Definition	Mapping Reference	Display Type
Currency	CURRENCY	Required

Template page (1 of 2)

Role Type

Label

Criteria

Apply Controlling BO

Include Contact Info Entry

Field Selection

Field Definition	Display Type		
<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Template page (2 of 2)

Quick Create templates associates the fields that are entered on Quick Create pages with the role and relationship types that are updated in the database when the user creates a new business object.

Market	Select the market for which this template is enabled.
Role Type	Select the role type for which you want to enable this quick create template.
Label	Enter the label that appears for this role type on the quick create page.
Criteria	Select the criteria definition that is invoked when searching for existing business objects from the Quick Create page. In the example page shot, when the user quick creates a <i>Company with Contact</i> , the <i>The Company</i> search definition is invoked to ensure that the company being created does not already exist.
Include Contact Info Entry	Select to include contact information for entry on the Quick Create page.
Include Purchasing Options	Select have the purchasing options appear on the Quick Create page.
Mapping Reference	Enter the name that is used by the adapter to refer to the field in the component buffer.
Apply Controlling BO	Select to have the system search for existing values of the role type only within logically related values for the parent business object. For example, if a company has multiple contacts, the system searches for contacts of the company only, regardless of whether other contacts with the search criteria exist.

Field Selection

Select one or more field definitions to include on the quick create template.

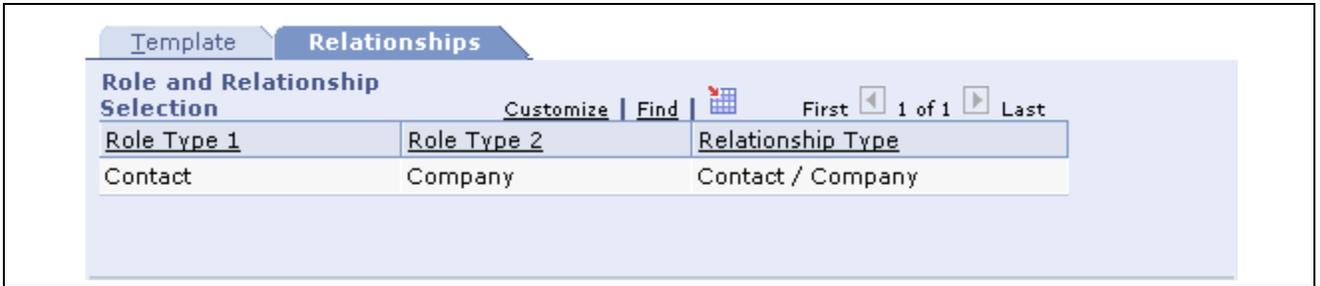
See Also

[Chapter 4, “Defining Name and Address Information for Business Objects.” Maintaining Contact Information for Business Objects, page 53](#)

[Chapter 5, “Defining Purchasing Options for Companies, Consumers, and Sites,” page 69](#)

Defining Relationship Details for the Template

Access the Relationships page.



Relationships page

Note. Defining template relationships is optional. Define relationships between roles only if you include more than one role on a template.

Role and Relationship Selection

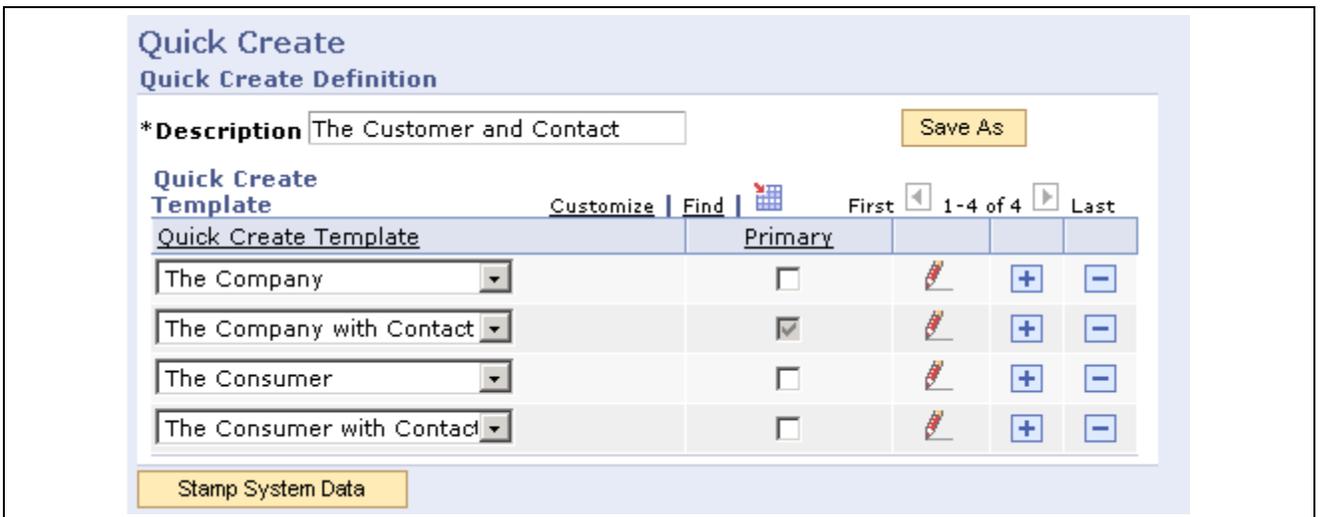
This page region enables you to specify the relationships that are built between the roles that are defined on a quick create template.

Role Type 1 and Role Type 2 Select the role types that are defined on the template.

Relationship Type Select the relationship type between the two selected roles.

Setting Up Quick Create Definitions

Access the Quick Create page.



Quick Create page

Quick Create Template Select one or more templates to associate with the definition.

Primary Select to indicate that the template is the primary, or controlling, template used by the quick create definitions.

Primary templates appear first on the runtime Quick Create page.

Associating Search Fields with a Role Type

Access the Search Role page.

Search Role

General Options

Description 360 (GBL) Cont of Company

Label Contact of Company

Role Type ID Contact

Relationship Type Contact / Company

Relationship Type 2 Primary Contact / Company

Apply SetID Security

None Both BOs

Primary BO Related BO

Apply Application Security

Primary BO Related BO

Apply Controlling BO

Primary BO Related BO

Apply Filter BO

Primary BO Related BO

Filter Record

Quick Create Template

Maximum Rows 50

Save As

Search Role page (1 of 2)

Used in Search Definitions
Find | View All | First 1-5 of 23 Last

Search Definition	Edit
The Contact of Customer	
FSI Customer and Contact	
COM Contact Multiple	
The Contact of Customer (C)	
RB Inbound Sender	

Field Selection

Field	Related BO	Search	Result	Edit
Last Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
First Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Phone	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Email	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Address	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
City	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
State	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Postal	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Country	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Customer ID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Search Role page (2 of 2)

A search role definition associates field definitions to one or more role types. When the user searches for a field, only business objects with a role that is associated with the search role definition are returned in the search results. Each search role definition is associated with a SQL engine and generates a single driver SQL statement and multiple list field SQL statements.

Search role definitions also specify how the search is conducted: security options, relationships to search, how the results are filtered, and the quick create template that is used to create new objects for the role.

General Options

Enter information that describes the role and how it appears.

Relationship Type and Relationship Type 2

Select a relationship type. All relationship types that apply to the role appear in these drop down lists. The one that you select is used to filter the search results.

Apply SetID Security

Select the options that determine how setID security is applied.

If you do not specify a relationship for the role, this field is a check box that you either select or not.

If you specify a relationship for the role, you have the options to apply SetID security to the primary, related, both, or neither business object in the relationship.

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

Apply Application Security, Apply Controlling BO, and Apply Filter BO Select the options that determine whether application security, controlling BO, and filter BO are applied to the primary or related business object in the relationship. If you do not specify a relationship, these options are not available.

Filter Record Enter the name of a record that is used to filter the search results.

Quick Create Template Enter the name of the quick create template that is used to enter a new object in the event of an unsuccessful search, or that is invoked directly from the BO Search by clicking the pencil icon.

Used in Search Definitions

A list of all search definitions that use the role appears here.

Field Selection

Add fields that the role can search.

Related BO Select if the field is a field of a related BO.
For example, for the Contact search role, you can check the Company Name field as a related BO because the field belongs to the company record and not the contact record.

Search Select to use this field as a search criterion.

Result Select for this field to appear in the search results.

Additional Search Role Options

Access the Field Selection - Additional page.

Field Selection					
Primary		Additional			
*Field		Search By Role	Search By Rel		
Last Name	<input type="checkbox"/>				
First Name	<input type="checkbox"/>				
Phone	<input type="checkbox"/>				
Email	<input type="checkbox"/>				
Address	<input type="checkbox"/>				
City	<input type="checkbox"/>				
State	<input type="checkbox"/>				
Postal	<input type="checkbox"/>				
Country	<input type="checkbox"/>				

Field Selection - Additional page

Use this page to override search views defined on the Field Definition - Role page.

Defining BO Searches

Access the Search page.

Search

General Options

*Description

*Label

Enable Role Groups

Save As

Search Definition Group

Find | View All First ◀ 1 of 3 ▶ Last

Label + -

*Control Type

*Result Display Type

Select Multiple

Quick Create

Role Definition Selection

Customize | Find First ◀ 1-3 of 3 ▶ Last

*Role Definition			
<input type="text" value="The Contact of Company"/>	✍	+	-
<input type="text" value="The Contact of Consumer"/>	✍	+	-
<input type="text" value="The Consumer"/>	✍	+	-

Search page (1 of 2)

Result Field Selection

Customize | Find First ◀ 1-12 of 12 ▶ Last

Field Definition		Role Type	Related BO		
<input type="text" value="Last Name"/>	✍	<input type="text" value=""/>	<input type="checkbox"/>	+	-
<input type="text" value="First Name"/>	✍	<input type="text" value=""/>	<input type="checkbox"/>	+	-
<input type="text" value="Name"/>	✍	<input type="text" value="Company"/>	<input checked="" type="checkbox"/>	+	-
<input type="text" value="Last Name"/>	✍	<input type="text" value="Individual Consumer"/>	<input checked="" type="checkbox"/>	+	-
<input type="text" value="First Name"/>	✍	<input type="text" value="Individual Consumer"/>	<input checked="" type="checkbox"/>	+	-
<input type="text" value="Phone"/>	✍	<input type="text" value=""/>	<input type="checkbox"/>	+	-
<input type="text" value="Email"/>	✍	<input type="text" value=""/>	<input type="checkbox"/>	+	-
<input type="text" value="Address"/>	✍	<input type="text" value=""/>	<input type="checkbox"/>	+	-
<input type="text" value="City"/>	✍	<input type="text" value=""/>	<input type="checkbox"/>	+	-
<input type="text" value="State"/>	✍	<input type="text" value=""/>	<input type="checkbox"/>	+	-
<input type="text" value="Postal"/>	✍	<input type="text" value=""/>	<input type="checkbox"/>	+	-
<input type="text" value="Country"/>	✍	<input type="text" value=""/>	<input type="checkbox"/>	+	-

Search page (2 of 2)

Enable Role Groups

Select to group the search results by role. For example, the Company, Site, and Alternate Capacity roles are grouped in the Organization group and the

Consumer, Contact of Company, Contact of Consumer, Worker roles are grouped in the Individual group.

Note. The appearance of this page changes when you select this check box. Two additional page regions, Search Definition Group and Field Selection appear.

Search Definition Group

Control Type	Indicate if the role group is <i>Controlling</i> , <i>Independent</i> , or <i>Dependent</i> . Results appear with the controlling role first, followed by all dependent group records that are associated with the controlling group. For example, this enables users to display organizations first, then all the individuals that are associated with the organization. You can only have one <i>Controlling</i> group.
Result Display Type	Indicate whether the results appear in one column or two column format.
Select Multiple	Select to enable the user to choose multiple records from the result set.
Quick Create	Select the quick create definition to associate with the role.

Role Definition

Select one or more roles for the search definition, define their appearance in results, and associate them with quick create definitions.

Role Definition	Select one or more search roles to associate with the search definition.
------------------------	--

Result Field Selection

This page region appears when you select Enable Role Groups. If you associate more than one role definition to a search, then you must enter field definitions. This is necessary because two or more roles can use the same field definition. You must indicate to which role the field pertains.

Field Definition	Select the name of the field definition.
Role Type	Select the role type to associate with the field definition. When the system displays results of the BO search, if role groups are enabled, the field appears only in the role group for the role type with which it is associated.
Related BO	Select to indicate that the field is defined on a related BO, not the primary BO that is the target of the search definition.

Defining Search Criteria Fields

Access the Criteria page.

Criteria
General Options

***Description**

***Label**

***Search Definition**

Search Definition 1

Search Definition 2

Search Definition 3

Search Definition 4

Search Definition 5

Enable Search Filter

Show Search Operators

Criteria Required

Criteria page (1 of 2)

Field Selection Customize | Find | View All | First 1-7 of 7 Last

*Field Definition	Role Type ID	Enable Search			
Name	Partner	<input type="checkbox"/>			
First Name		<input checked="" type="checkbox"/>			
Last Name		<input checked="" type="checkbox"/>			
City		<input type="checkbox"/>			
State		<input type="checkbox"/>			
Postal		<input type="checkbox"/>			
Country		<input type="checkbox"/>			

Criteria page (2 of 2)

This page captures information about the search definitions to invoke when the user enters certain fields.

- Description** Enter the name for the group of criteria that you specify.
 This name is used to link the criteria to an adapter section.
- Search Definition** Enter the default search definition.
 The definition is used by default when the user searches for a field
- Search Definition 1, Search Definition 2, Search Definition 3, Search Definition 4 and Search Definition 5** Enter alternate search definitions.
 These search definitions appear at runtime. The user can search by the default definition or select an alternate.
- Enable Search Filter** Select to have only the search fields that are associated with the selected search definition appear at runtime.
- Show Search Operators** Select to have the search operators appear on the BO Search page at runtime.

Criteria Required Select to require the user to enter search criteria at runtime before searching.

Field Selection

Use this page region to select fields for a search criteria definition, specify the roles for which the field appears, and select the search definitions for which the field is enabled.

Role Type ID Select the role to which the field applies, in the case where a field is shared by different roles. For example, if the Name field is shared between the Company and Site roles. To have it appear once as *Company Name* and once as *Site Name*, you need to select the Name field twice and associate one to the Company role and one to the Site role.

Enable Search 1, Enable Search 2, Enable Search 3, Enable Search 4 and Enable Search 5 Select to enable the corresponding search definition for the field. For example, if you enable Search 1 and Search 3 for a field, then these search definitions appear in a drop down list at runtime. The user can select a search definition or search by the default definition.

Note. If you select a field for multiple roles, at runtime the field appears once in the search criteria for each role selected. You can specify different field labels for each role to differentiate between multiple occurrences.

Specifying Basic Search Criteria Fields

Access the Adapter page.

The screenshot shows the 'Adapter' page with tabs for 'Sections' and 'Labels'. The 'General Options' section contains the following fields:

- *Description: CDM Person
- *Component Name: RD_PERSON
- *Market: GBL
- Mapping Reference: (empty)
- Create Option: (empty)
- Application Class ID: CDMPerson
- Toolbar ID: (empty)
- Config Search applicable
- Trace SQL Statement

The 'Extension Selection' section features a table with the following data:

*Extension Event	Section Record Name		
PostComplete	Customer	+	-
PostComplete	Customer FSI	+	-
PostComplete	Company	+	-
PostComplete	Partner_1	+	-

Adapter page

Component Name Specify the component to which this adapter definition pertains.

Market	Select the market to which this adapter definition pertains.
Mapping Reference	Enter a reference that is used to switch adapters if more than one adapter is needed for a component. This might occur if the same field is used by more than one role.
Create Option	The Create Option is used to hold an authorization code that determines which users can use quick create.
Application Class ID	Select the application class where subpages defined by the adapter are defined.
Toolbar ID	Select the name of the component toolbar where the names of the business objects that are retrieved by BO Search appear. A component toolbar is used to display common information across all pages in the component.
Config Search Applicable (configurable search applicable)	Select to enable configurable search pages for the component to invoke this search definition.
Trace SQL Statement	Select to have the system write the SQL statements that are executed by the search at runtime to a trace log.
Extension Selection	
Extension Event	Select a method from the list that appears. This list contains the methods of the selected application class. You can use these to write custom code.
Section Record Name	Enter the section to which this extension applies. The list of available sections is taken from the sections that you defined on the Sections page.

Defining Fields for Transaction Subpages

Access the Sections page.

Sections page (1 of 2)

Role Type	Relationship Type	Apply Security		
Ship To Organization		<input type="checkbox"/>	+	-
Ship To Individual		<input type="checkbox"/>	+	-

Sections page (2 of 2)

Note. Before you configure the transaction adapter for fields, make sure that you have an extensive understanding of system data and transactions.

- Section Record** The name of the record that is used as the subpage on the transaction.
- Criteria** Select the criteria definition that is used by this section.
- Section Type** Select from *One Column*, *Two Column*, *Hidden*, or *Custom*. If you need to identify a customer in a grid, then specify *Custom*. *Custom* sections are used in configurable search pages; other section types are used for customer identification on component and transaction pages.
- Page Name** Select the page name that can contain this adapter section. This provides the flexibility to define sections with differing section options, for example, security, in the same adapter.
- Enable Search Button** Select to have a Search button appear on the sub page at runtime.

Field Selection

Field	Enter the name of the field to appear on the transaction.
BO Assigned	Select to indicate that this field is associated to a primary BO on this section.
Section Control	Select to have the field label as defined for this section take precedence over label definitions for the same field as defined for any other section or role. This ensures consistency of the user interface.
Criteria	Select to use a value that is identified for the field as a criteria for additional searches. For example, when a company is identified at runtime, a prompt button with a search for contact appears. When the user clicks the prompt, the system invokes the search definition that is entered in this field.
Mapping Reference	Enter the logical name of the field on the transaction's component buffer.

Display Options

The entries in this page region control how the section appears to the user at runtime. Different fields appear depending on the Section Type you select.

Search by Role	Select to have the search results displayed by role.
Required Flag	Select to require that the user enter search criteria in the section's fields. This field appears only if you select a Section Type of <i>Custom</i> .

The following fields appear only if the Section Type is not *Custom*.

Display Option	Select the functional option that controls security on this field. This is used in conjunction with display templates.
Initialized Display	Select how the field appears when the user first accesses the component. The options in this list control if the field is enterable and if the user can look up field values. For example, the Company Name field on the Case component is enterable but not required.
Identified Display	Select how the field appears when a value is found for the field. For example, if the company name is found, the name appears as a hyperlink to the Company component.
Initialized Label	Enter the text for the field label when the user first accesses the component. For example, <i>Enter a Company Name</i> .
Identified Label	Enter the text of the field label that appears when the user first accesses the component. For example, <i>Company Name</i> .

Security Options

The fields in this page region are used to define security for Partner Relationship Management. To complete the security setup, you must have a relationship established between the two business objects.

Primary Object	Enter the object that is used as a prompt table for the section. For example, to validate field entries on Partner objects, select the <i>Partner</i> value.
-----------------------	--

Related Object	Enter the object that is related to the primary object. For example, when building a partner-customer relationship, the related object is <i>Customer</i> .
Related Section	Enter the adapter section name that is used to identify the value in the Related Object field.
Search Option	Select the option that determines whether to restrict all or selected users from viewing search results or secured search result. If you leave this field blank, then all users will be able to view only the related search results, for example, only the partners that are associated with a selected customer. If this field is populated, then users whose code matches the search option will be able to view all results (not restricted).

Role Definition Selection

Select the role and relationship to be secured for the section and check the Apply Security check box. If no security is required then leave the checkbox empty. If both Customer and Partner fields require restricted views, then the checkbox must be selected on both sections.

This page region works in conjunction with the Security Options region, in this way:

The primary and related search objects define the relationship between the two adapter sections and the search options define the authorization code that determines which users are restricted. The Apply Security check box determines to which roles and relationships of the two objects security is applied.

Defining Labels

Access the Labels page.

Labels page

Use this page to specify the labels that appear on BO search and quick create pages that are initiated from a transaction subpage. This ensures consistency between labels for fields on customer identification subpages, advanced BO Search pages, and Quick Create pages.

Role Type	Select the role type to which this label applies. If not selected, the label override applies to all roles.
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CHAPTER 16

Defining Ad Hoc Business Objects

This chapter provides an overview of ad hoc business objects and discusses how to define ad hoc business objects.

Understanding Ad Hoc Business Objects

The business object types that the PeopleSoft system delivers are sufficient to process all transactions in the delivered PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) system. To meet additional business requirements, you can define ad hoc business objects. You define and manage ad hoc business objects in the Business Object component.

Before you can add an ad hoc business object to the system, you must define control values for the object. Ad hoc business objects use the same controls as delivered business objects: business object types, name types, role types, and relationship types.

Note. You use the same pages to define and maintain control information for ad hoc business object that you use to maintain controls for business object types, such as company, site, and person, that are delivered with PeopleSoft Enterprise CRM.

You can also use the relationship viewer in the Business Object component to maintain names, roles, and relationships for the business objects that you maintain in CRM components (Company, Site, and Person). For example, to add the broker role to a contact, you would search for the contact by name and access the Relationship Viewer page. To create these roles and relationships, you must first set up the appropriate control values and configure a relationship view to recognize this type of relationship.

See Also

[Chapter 2, “Understanding Business Object Relationship Model Components,” page 7](#)

[Chapter 3, “Defining Control Values for Business Objects,” page 13](#)

Defining Ad Hoc Business Objects

To define ad hoc business objects, use the Business Object (BO) component.

This section discusses how to:

- Maintain name information.
- View and maintain ad hoc business object relationships.

See Also

Chapter 8, “Working with the Relationship Viewer,” page 101

Pages Used to Define Ad Hoc Business Objects

Page Name	Object Name	Navigation	Usage
Business Object - Business Object	BO	Customers CRM, Business Object, Business Object	Maintain name information for ad hoc business objects.
Business Object - Relationships	BO_REL	Customers CRM, Business Object, Relationships	View and maintain ad hoc business object relationships.

Maintaining Name Information

Access the Business Object - Business Object page.



Business Object - Business Object page

Name Type Displays the business object type.

See Chapter 3, “Defining Control Values for Business Objects,” Defining Business Object and Name Types, page 21.

Viewing and Maintaining Ad Hoc Business Object Relationships

Access the Business Object - Relationships page.

See Chapter 8, “Working with the Relationship Viewer,” page 101.

PART 6

Customer and Worker Data Integrations

Chapter 17

Managing Enterprise Integration for PeopleSoft Enterprise CRM

Chapter 18

Importing Data Into PeopleSoft Enterprise CRM

CHAPTER 17

Managing Enterprise Integration for PeopleSoft Enterprise CRM

This chapter provides overviews of enterprise integration technology and data integrations and discusses how to:

- Set up defaults for integrating customer and contact information.
- Market-enable Company, Consumer, Site, and Contact EIPs.
- Establish master ID databases.
- Map message data to PeopleSoft Enterprise CRM records and fields.

Understanding Enterprise Integration Technology

This section discusses:

- Enterprise integration points (EIPs) in PeopleSoft Enterprise CRM
- PeopleSoft Enterprise CRM Foundation EIPs
- Application Messages
- Data Mapping for Application Messages

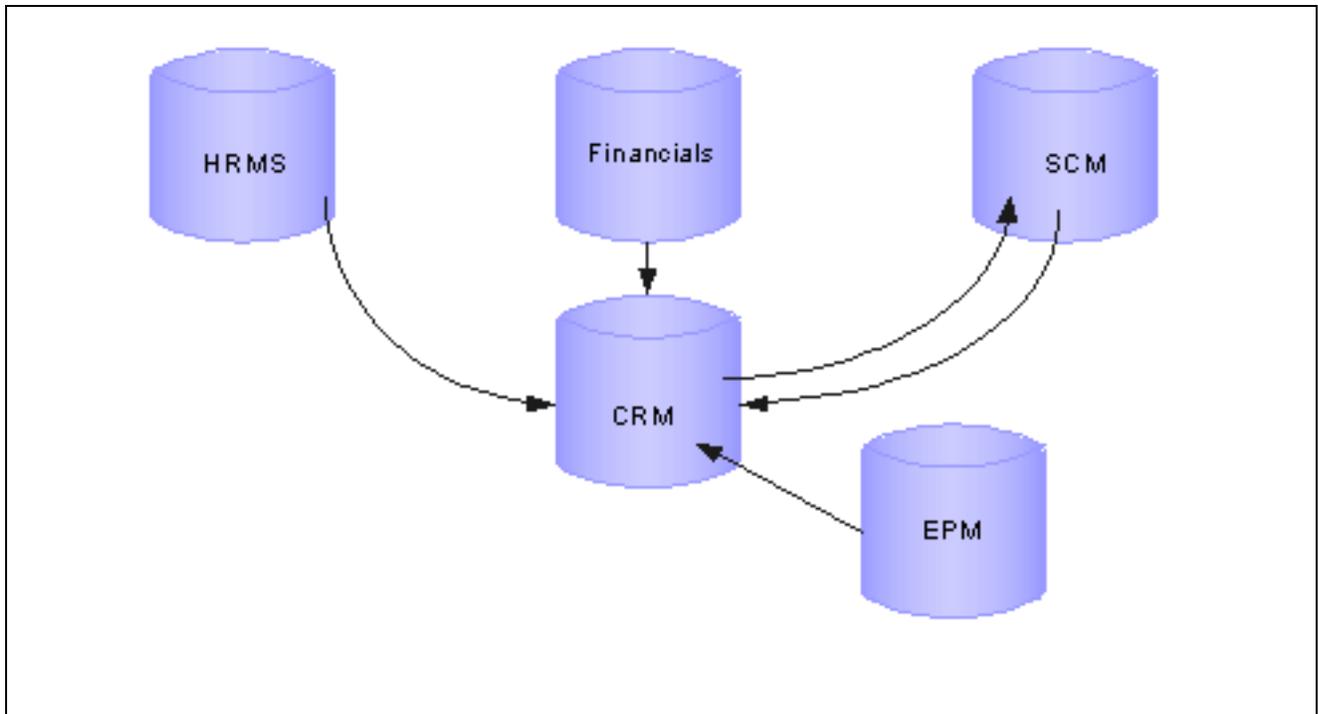
EIPs in PeopleSoft Enterprise CRM

PeopleSoft Enterprise CRM provides many ways of integrating with other PeopleSoft applications as well as third-party systems. PeopleSoft Enterprise CRM applications collaborate to manage and share data across your enterprise—from managing customers and workers to tracking inventory.

PeopleSoft Enterprise CRM uses EIPs to integrate with:

- PeopleSoft applications outside of CRM.
- Third-party applications.

This diagram illustrates how PeopleSoft Enterprise CRM works with other PeopleSoft applications to manage and share data across your enterprise:



Integration between PeopleSoft databases

PeopleSoft Enterprise CRM integrates with:

- PeopleSoft HRMS, which publishes employee and workforce data to the CRM database.
- PeopleSoft Financial Management Solutions and PeopleSoft Supply Chain Management (PeopleSoft SCM) for customer, contact, and product information.

This is a two-way integration.

- PeopleSoft Enterprise Performance Management (PeopleSoft EPM), which publishes the data mining results from Customer Behavior Modeling for use in PeopleSoft Enterprise CRM.

By taking advantage of the integration technology that PeopleSoft software provides and the existing integrations with PeopleSoft HRMS, PeopleSoft Financial Management Solutions, and PeopleSoft SCM, you can integrate with other third-party systems. PeopleSoft Enterprise CRM achieves integration using Application Messaging, Business Interlinks, and the PeopleTools Integration Broker technology.

PeopleSoft Enterprise CRM offers many ways of integrating with third-party applications. For example, if you send or publish a message to a third-party system, the system structures the data into a message and automatically delivers it to the destination location. You can also accept or subscribe to messages from third-party systems. The system validates incoming data, checking for errors before updating the system of record.

You can also send a synchronous request or reply transaction to a third-party system for processing and receive a real-time response.

Note. There is no CRM LOCATION_SYNC_EFF, LOCATION_FULLSYNC_EFF, DEPT_SYNC_EFF and DEPT_FULLSYNC_EFF message in CRM. The LOCATION_SYNC, LOCATION_FULLSYNC, DEPT_SYNC, and DEPT_FULLSYNC messages contain both the SYNC and EFF message structures.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Testing Utilities and Tools

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Business Interlinks

PeopleSoft Enterprise CRM Foundation EIPs

This table lists the EIPs that are provided with PeopleSoft software for foundation PeopleSoft Enterprise CRM:

EIP Name	Description	Message Name	Direction of Integration	Technology
CUSTOMER	Customer information is retrieved to PeopleSoft Enterprise CRM from other external systems.	CUSTOMER_SYNC CUSTOMER_FULLSYNC_EFF	PeopleSoft Enterprise CRM ↔ SCM/external system	Application Message
CUSTOMER_COMPANY	Synchronizes company information with other systems.	CUST_COMPANY_FULLSYNC CUST_COMPANY_FULLSYNC_EFF CUST_COMPANY_SYNC CUST_COMPANY_SYNC_EFF	PeopleSoft Enterprise CRM ↔ SCM/external system	Application Message
CUSTOMER_CONSUMER	Synchronizes consumer information with other systems.	CUST_CONSUMER_FULLSYNC CUST_CONSUMER_FULLSYNC_EFF CUST_CONSUMER_SYNC CUST_CONSUMER_SYNC_EFF	PeopleSoft Enterprise CRM ↔ SCM/external system	Application Message
CUSTOMER_SITE	Synchronizes site information with other systems.	CUST_SITE_FULLSYNC CUST_SITE_FULLSYNC_EFF CUST_SITE_SYNC CUST_SITE_SYNC_EFF	PeopleSoft Enterprise CRM ↔ SCM/external system	Application Message

EIP Name	Description	Message Name	Direction of Integration	Technology
WORKER	Synchronizes worker information with other systems.	WORKER_FULLSYNC WORKER_FULLSYNC_EFF WORKER_SYNC WORKER_SYNC_EFF	PeopleSoft Enterprise CRM ↔ PeopleSoft HCM/third-party HRMS system	Application Message
CUSTOMER_CONTACT	Synchronizes contact information with other systems.	CONTACT_SYNC CONTACT_SYNC_EFF CONTACT_FULLSYNC CONTACT_FULLSYNC_EFF	PeopleSoft Enterprise CRM ↔ SCM/external system	Application Message
PARTNER_PROFILE	Synchronizes partner program information with other systems.	PARTNER_PROFILE_SYNC PARTNER_PROFILE_FULLSYNC	PeopleSoft Enterprise CRM ↔ SCM/external system	Application Message
BUSINESS UNIT TABLE FS	Synchronizes financial business unit data.	BUS_UNIT_FS_FULLSYNC BUS_UNIT_FS_SYNC	PeopleSoft Enterprise CRM ↔ SCM	Application Message
TABLE SET CONTROL	Synchronizes setID data.	SETID_INITIALIZE	PeopleSoft Enterprise CRM ↔ SCM	Application Message
COUNTRY TABLE	Synchronizes country codes and address data to an external system.	COUNTRY_FULLSYNC COUNTRY_SYNC	PeopleSoft Enterprise CRM ↔ SCM/HRMS /External system	Application Message
STATE TABLE	Synchronizes state name, description, and abbreviation information with an external system.	STATE_FULLSYNC STATE_SYNC	PeopleSoft Enterprise CRM ↔ SCM/HRMS /external system	Application Message
UNIT OF MEASURE	Synchronizes units of measure with an external system.	UOM_FULLSYNC UOM_SYNC	PeopleSoft Enterprise CRM ↔ SCM/HRMS /external system	Application Message

EIP Name	Description	Message Name	Direction of Integration	Technology
CURRENCY CODE TABLE	Transmits currency code data.	CURRENCY_FULLSYNC CURRENCY_SYNC	PeopleSoft Enterprise CRM ↔ SCM/external system	Application Message
MARKET RATES DATA	Imports and synchronizes updated market rates.	CURR_QUOTE_MTHD_FULLSYNC CURR_QUOTE_MTHD_SYNC MARKET_RATE_DEFN_FULLSYNC MARKET_RATE_DEFN_SYNC MARKET_RATE_FULLSYNC MARKET_RATE_SYNC MARKET_RATE_LOAD MARKET_RATE_INDEX_FULLSYNC MARKET_RATE_INDEX_SYNC MARKET_RATE_TYPE_FULLSYNC MARKET_RATE_TYPE_SYNC	PeopleSoft Enterprise CRM ↔ SCM/HRMS /external system	Application Message
DEPARTMENT TABLE	Synchronizes departments across the enterprise.	DEPT_FULLSYNC DEPT_SYNC	PeopleSoft Enterprise CRM ↔ SCM/HRMS /external system	Application Message
LOCATION TABLE	Synchronizes location table data across the enterprise.	LOCATION_FULLSYNC LOCATION_SYNC	PeopleSoft Enterprise CRM ↔ SCM/HRMS /external system	Application Message

EIP Name	Description	Message Name	Direction of Integration	Technology
PRODUCT	Synchronizes product information with PeopleSoft SCM or third-party external systems.	PRODUCT_FULLSYNC PRODUCT_SYNC PRODUCT_GROUP_FULLSYNC PRODUCT_GROUP_SYNC PRODUCT_SYNC_EFF	PeopleSoft Enterprise CRM ↔ SCM/external system	Integration Broker
COMPETENCY TYPE	Receives competency information from PeopleSoft HRMS.	CM_TYPE_FULLSYNC CM_TYPE_SYNC	PeopleSoft Enterprise CRM ↔ HRMS	Application Message
COMPETENCY TABLE	Receives competency and accomplishment details from PeopleSoft HRMS.	COMPETENCY_FULLSYNC1 COMPETENCY_SYNC1	PeopleSoft Enterprise CRM ↔ HRMS	Application Message
PERSON COMPETENCY	Receives a person's competency data from PeopleSoft HRMS.	PERSON_COMPETENCY_FULLSYNC PERSON_COMPETENCY_SYNC	PeopleSoft Enterprise CRM ↔ HRMS	Application Message
RATING MODEL	Receives rating model data from PeopleSoft HRMS.	RATING_MODEL_FULLSYNC RATING_MODEL_SYNC	PeopleSoft Enterprise CRM ↔ HRMS	Application Message
PERSONAL DATA	Synchronizes personal data from PeopleSoft HRMS.	PERSON_BASIC_FULLSYNC PERSON_BASIC_SYNC	PeopleSoft Enterprise CRM ↔ HRMS	Application Message
WORKFORCE DATA	Synchronizes workforce data from PeopleSoft HRMS.	WORKFORCE_FULLSYNC WORKFORCE_SYNC	PeopleSoft Enterprise CRM ↔ HRMS	Application Message

EIP Name	Description	Message Name	Direction of Integration	Technology
PERSON OF INTEREST DATA	Synchronizes persons of interest (POIs) that do not have a job record from PeopleSoft HRMS. POIs with a job record are synchronized in the WORKFORCE DATA EIP.	PERS_POI_SYNC	PeopleSoft Enterprise CRM ↔ HCM	Application Message
CALENDAR /TASK	Fully synchronizes the calendar with Outlook, Lotus Notes, or other personal information manager (PIM).	PIM_CONTACT_SYNC	PeopleSoft Enterprise CRM ↔ Outlook/PIM	Application Message
CUSTOMER GROUP	Synchronizes customer groups.	CUSTOMER_GROUP_FULLSYNC CUSTOMER_GROUP_SYNC	PeopleSoft Enterprise CRM ↔ SCM	Application Message
REPRESENTATIVE	Synchronizes representative data with PIM.	PIM_CONTACT_SYNC REP_SYNC	PeopleSoft Enterprise CRM ↔ Personal Information Manager (PIM)	Application Message
PS GETID	Retrieves customer IDs and contact IDs from other PeopleSoft systems.	PSGETID	PeopleSoft Enterprise CRM ↔ SCM	XML link
GET CUSTOMER VALUE	Retrieves customer value/KPI information from PeopleSoft EPM and updates the BC (Business Contact) and the RB_CLAF_EPM_KIP (Key Performance Indicator) tables in the PeopleSoft Enterprise CRM database.	KP_KPI_ASMT_FACTS	PeopleSoft Enterprise CRM ↔ EPM	Application Message

EIP Name	Description	Message Name	Direction of Integration	Technology
<p>GET BILLS FOR 360 DEGREE VIEW</p>	<ul style="list-style-type: none"> • Requests billing information (bills) from PeopleSoft Billing to display in the 360-Degree View. • PeopleSoft Billing responds with the billing information that is requested from the PeopleSoft Enterprise CRM 360-Degree View. 	<ul style="list-style-type: none"> • BI_EIP360_REQ • BI_EIP360_RSP 	<ul style="list-style-type: none"> • PeopleSoft Enterprise CRM ↔ SCM • PeopleSoft Enterprise CRM ↔ SCM 	<ul style="list-style-type: none"> • Application Message • Application Message
<p>GET ACCOUNT RECEIVABLES FOR 360 DEGREE VIEW</p>	<ul style="list-style-type: none"> • Requests payment information (payments) from PeopleSoft Receivables to display in the 360-Degree View. • PeopleSoft Receivables responds with the payment information that is requested from the PeopleSoft Enterprise CRM 360-Degree View. 	<ul style="list-style-type: none"> • AR_CRM_REQUEST • AR_CRM_RESPONSE 	<ul style="list-style-type: none"> • PeopleSoft Enterprise CRM ↔ Financial Management Solutions • PeopleSoft Enterprise CRM ↔ Financial Management Solutions 	<ul style="list-style-type: none"> • Application Message • Application Message

EIPs that support particular business processes and applications are documented in other PeopleSoft Enterprise CRM PeopleBooks. The online EIP Catalog database lists, with technical details, the EIPs that PeopleSoft Enterprise CRM uses.

See Also

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, “Integrating with Fulfillment and Billing Systems”

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Integrating with PeopleSoft Applications”

Application Messages

EIPs that publish data to another database are available as both FULLSYNC and SYNC messages. FULLSYNC messages are designed for use at implementation time for setup information. Once a table has been set up, the SYNC messages allow for updates to that data.

Important! Some FULLSYNC messages are designed to fully replace the data through the use of the header message. To avoid losing existing data, turn off the header—the message refreshes the data by updating the existing data and adding any missing data.

Application Message Setup

As delivered, PeopleSoft EIP application messages are inactive.

To set up a delivered application message:

1. Activate the application message.
2. For inbound messages, activate the message subscription PeopleCode.
3. Set the associated message channel to Run mode.
4. Configure an existing message node or define a new message node.
5. Define asynchronous or synchronous transactions on the message node.
6. Define relationships to reconcile transaction parameters for routing, transmission type, message structure, or message content, if necessary.

See *Enterprise PeopleTools 8.48 PeopleBook: Integration Broker*

Data Mapping for Application Messages

PeopleSoft Enterprise CRM has the capability of subscribing to other PeopleSoft-application or third-party-application messages. Before PeopleSoft Enterprise CRM can subscribe to a PeopleSoft EPM message or any third-party message, data mapping must occur between the source format and the destination format. To accommodate this data mapping, PeopleSoft Enterprise CRM created a Data Mapping component. Using this component, you can perform data mapping for any single-level hierarchical message.

The integration between PeopleSoft EPM and CRM is currently the one place that uses this data mapping component. Before PeopleSoft Enterprise CRM can receive key performance indicator (KPI) information through the KP_KPI_ASMT_FACTS application message from EPM, the application message data must be mapped to data fields that the CRM system recognizes. To assist with this integration, PeopleSoft provides a predefined data mapping structure sample.

Alternatively, data is inserted into RB_CLAF_EPM_KPI table via the KP_KPI_EPM terms subscription. This subscription creates terms for the Active Analytics Framework.

This table shows the predefined data mapping structure sample provided with PeopleSoft software to assist with integration between PeopleSoft Enterprise CRM and EPM:

Message Name	Record to Update	Fields to Update Field/XML Tag	Record Identification Field/XML Tag	Message Row Identification XML Tag Name/XML Tag Value
KP_KPI_ASMT_FACTS	BC	<ul style="list-style-type: none"> • ASSESS_DESCR /ASSESS_DESCR • ASSESS_ID /ASSESS_ID • ASSESS_IMAGE_ID /ASSESS_IMAGE_ID • KPI_ID/KPI_ID • PCT_OF_TARGET/PCT_OF_TARGET • RESOLVED_VALUE /RESOLVED_VALUE 	CUST_ID/OBJ_ID	PF_OBJECT_TYPE /CUSTOMER MASTER

See Also

Chapter 9, “Defining Company Business Objects,” Defining Company Information, page 117

Chapter 11, “Defining Person Business Objects,” Defining Person Information, page 145

Chapter 17, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” Mapping Message Data to PeopleSoft Enterprise CRM Records and Fields, page 324

Data Integrations

This section discusses:

- Integration with PeopleSoft HRMS or third-party HRMS.
- Customer and contact data integration.
- Worker data integration.
- Product data integration.
- Bill and payment data integration.
- Other integration considerations.

Integration with PeopleSoft HRMS or Third-Party HR Data

You use four EIP groups to integrate PeopleSoft Enterprise CRM with a PeopleSoft HRMS system or another third-party HR system: Person Basic, Workforce, Person of Interest and Person Competencies. Each group requires that you run additional supporting EIPs, and must be processed in a particular sequence.

These EIPs, with the exception of the POI, are available as both FULLSYNC and SYNC messages. You should perform FULLSYNC messages at implementation time to set up your PeopleSoft Enterprise CRM database correctly.

To set up your database with FULLSYNC messages (recommended sequence):

1. Before you run the main EIPs, run these common EIPs:
 - a. Country
 - b. State
 - c. Currency
 - d. SetID Initialization
 - e. Table Set Control Initialization
 - f. Location
 - g. Business Unit
2. Run the Person Basic EIP.
3. Run the Workforce EIP group.
 - a. Department
 - b. Job Code
 - c. Workforce
4. Run the Person Competencies EIP group.
 - a. CM_TYPE
 - b. Rating Model
 - c. Competency
 - d. Person Competency
5. Inactivate the FULLSYNC messages and activate the corresponding SYNC messages.

SYNC messages always originate in PeopleSoft HRMS or a third-party system and publish to PeopleSoft Enterprise CRM. Thus, any field in PeopleSoft Enterprise CRM that an EIP populates must be maintained from the originating source database, whether it is PeopleSoft HRMS or a third-party system.

Note. If you create workers within PeopleSoft Enterprise CRM, you must maintain these workers in CRM until you create them in an HRMS or third-party database.

Personal Data

PeopleSoft Enterprise CRM subscribes only to this subset of personal data:

- Worker's and POI's physical address (addresses with the address type Mailing).
- Worker's and POI's email address (email addresses that do not have an email type of Home).
- Worker's and POI's phone number (phone numbers that do not have a phone type of Home).

Job Code Data

PeopleSoft Enterprise CRM subscribes to all job information for worker and for a POI. All fields (except for Physical Location) in the Worker component are updated from PeopleSoft HRMS.

Customer and Contact Data Integration

In PeopleSoft Enterprise CRM, a *customer* can be either a company, a partner company, a consumer, or a site that is associated with a company or consumer. A *contact* is any person who performs transactions on a customer's behalf.

Company, Consumer, Site, and Contact EIPs

Use the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, and CUSTOMER_SITE EIPs to synchronize customer information with other systems. When you implement these EIPs, application messages are published whenever a company, partner company, consumer, or site record in the PeopleSoft Enterprise CRM system is added or modified. PeopleSoft Enterprise CRM can also subscribe to these EIP application messages that are published when these records are modified in another system.

Note. CRM cannot publish a company with grandparent companies to SCM, because SCM only supports a two-level customer hierarchy, whereas CRM can support multi-level customer hierarchies. If you have implemented the CUSTOMER_COMPANY EIP and a company with grandparent companies is added in the Company component, this online message is issued:

SCM doesn't allow multi-level customer hierarchy, No message will be published

The PARTNER_PROFILE EIP is triggered when you update data for a company that has the Partner role. It publishes an application message whenever a partner record is added or modified. The data in this EIP contains only information that is specific to the Partner role. The CUSTOMER_COMPANY EIP is also published to synchronize the basic company information.

The CUSTOMER_CONTACT EIP enables you to synchronize customer contact information with another system. When you implement the CUSTOMER_CONTACT EIP, application messages are published when a contact record in the PeopleSoft Enterprise CRM system is added or modified. CRM can also subscribe to CUSTOMER_CONTACT EIP application messages that are published when these records are modified in another system.

Important! You must market-enable the Company, Consumer, Site, Partner Profile, and Contact EIPs before PeopleSoft Enterprise CRM can send customer (company, partner profile, consumer, and site) and contact data to other databases. Market-enabling enables you to specify what data the PeopleSoft Enterprise CRM system sends to other systems for a specific market. For example, you might opt not to publish certain customer and contact data to an external system for the FSI market. At the minimum, you must specify a global market to interface all non-market specific data.

See [Chapter 17, "Managing Enterprise Integration for PeopleSoft Enterprise CRM," Market-Enabling Company, Consumer, Site, and Contact EIPs, page 320.](#)

Partner Profile EIP

This EIP is triggered when you update data for a company that has the Partner role.

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

Site Considerations

Only CRM sites that are flagged with the bill-to or sold-to purchasing options are integrated as customers with PeopleSoft SCM. If a site is flagged as Ship To only then the site is integrated with PeopleSoft SCM as an address to the company with which the site is associated.

When you add the bill-to or sold-to flag to a ship-to site, the system publishes the site message to create a new customer in PeopleSoft SCM. However, if a customer already exists in PeopleSoft SCM, removing the bill-to and sold-to options from the site does not remove the customer information for that site in PeopleSoft SCM.

Specifying Customer ID and Contact ID Default Values

You must specify the system that owns the customer ID and contact ID and verify the automatic numbering for ID generation for each setID.

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

Customer and Contact Integration with Other PeopleSoft Applications

Unlike PeopleSoft Enterprise CRM, PeopleSoft Financial Management Solutions and PeopleSoft SCM do not distinguish between company, consumer, and site records. CUSTOMER_COMPANY, CUSTOMER_CONSUMER, and CUSTOMER_SITE EIP application messages to which these systems subscribe are all mapped to customer records with unique customer IDs in the PeopleSoft Financial Management Solutions and PeopleSoft SCM systems.

When customer records are added or modified in PeopleSoft Financial Management Solutions and PeopleSoft SCM, the system publishes application messages using the Customer EIP. These messages are mapped to companies in the PeopleSoft Enterprise CRM system.

When a record that is created in PeopleSoft Enterprise CRM is modified in PeopleSoft Financial Management Solutions and PeopleSoft SCM, the system uses the record key information (customer ID and setID) that is included in the application message that’s reporting the change to derive the record’s original business object ID in PeopleSoft Enterprise CRM. This enables CRM to apply the changes that are reported in the application message to the corresponding company, consumer, or site record.

To ensure uniqueness of customer ID and contact ID between multiple PeopleSoft Enterprise CRM databases, you must specify the system that owns the customer ID and contact ID and verify the automatic numbering for ID generation for each setID.

See [Chapter 17, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” Establishing Master ID Databases, page 322](#).

Note. The CUSTOMER_COMPANY, CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and CUSTOMER_SITE EIPs enable you to maintain customer information in multiple databases. However, to simplify integration of customer information, choose one database as the system of record for customer maintenance, and use PeopleTools portal technology to support customer information inquiries from the other systems. If you maintain customer and contact information in multiple databases, you must consider additional design, planning, and integration steps.

Customer and Contact EIP Application Messages Processing Order

In PeopleSoft Enterprise CRM, because contacts can be associated with a company, consumer, or site, the company, consumer, or site record should be created before the contact record. When you implement the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and CUSTOMER_SITE EIPs, make sure that the application messages from the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, and CUSTOMER_SITE EIPs are processed before application messages from the CUSTOMER_CONTACT EIP when performing a FULLSYNC process.

Maintaining Customer and Contact Information in Different Databases

In PeopleSoft, customers exist in PeopleSoft Enterprise CRM, PeopleSoft SCM, and PeopleSoft Financial Management Solutions. There are a number of ways to design the system to integrate between PeopleSoft Enterprise CRM, PeopleSoft SCM, and PeopleSoft Financial Management Solutions. The simplest way to integrate customer master information is to manage all customer maintenance out of one database and support inquiry only on the other databases. Then you can use PeopleTools portal technology to access either system.

You might have a compelling business reason to maintain customer and contact information in different databases. For example, you may elect to have your front office users create customers in the PeopleSoft Enterprise CRM database but want to use the Receivables payment processing options that are available only in Financial Management Solutions.

If you choose to maintain customer (company, consumer, and site) and contact information in different databases, you must:

- Define which database owns the customer and contact ID number assignment on the Master ID DB Setup page.

By specifying an owner, the system will be consistent in assigning a unique customer or contact ID for a particular customer or contact across different databases.

- Set up defaulting for the CRM Name Type field on the Name Type Defaults page.

You cannot add new contacts or customers to the PeopleSoft Enterprise CRM database through the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and CUSTOMER_SITE EIPs unless you complete this step.

- Set up at least one PeopleSoft Enterprise CRM market control code for interfacing CRM customer and contact data to other databases.
- Evaluate whether you plan to define customers as bill-to customers in PeopleSoft Enterprise CRM.

In PeopleSoft SCM and PeopleSoft Financial Management Solutions, customers that you define as bill-to customers must also have a defined collector and credit analyst. To ensure that PeopleSoft Enterprise CRM passes these required fields to PeopleSoft SCM and PeopleSoft Financial Management Solutions, select the Collector/Credit Analyst Req (collector/credit analyst required) check box on the Installation Setup table. This ensures that PeopleSoft Enterprise CRM satisfies the required field edit that is needed to populate PeopleSoft Financial Management Solutions and PeopleSoft SCM. Set up defaulting of these values on the Interface Defaults page under Define Integration Rules.

- Manually keep the Collector and Credit Analyst table in PeopleSoft Enterprise CRM in sync with the PeopleSoft Financial Management Solutions and PeopleSoft SCM Collector and Credit Analyst table.
- Establish a default support team code in PeopleSoft Enterprise CRM for each setID to be used in when creating a customer.

In PeopleSoft SCM and PeopleSoft Financial Management Solutions, a default support team code is required for each customer. To satisfy the required field edit, PeopleSoft Enterprise CRM enables you to set up a default value on the Interface Defaults page under Define Integration Rules. In addition, ensure that the value setup on the Default page also exists on the PeopleSoft SCM and PeopleSoft Financial Management Solutions system.

PeopleSoft SCM and PeopleSoft Financial Management Solutions Customer-Related Pages That Are Unavailable in PeopleSoft Enterprise CRM

These pages in the PeopleSoft SCM or PeopleSoft Financial Management Solutions Customer component are not available in CRM:

- Vendor Info.
- Credit Profile - General.
- Credit Profile - Credit Check.
- Region Code Info.
- Subcustomer Info.
- Customer Group Info.
- Customer VAT Info (customer value-added tax information).
- Customer Notes Info.
- Attachments.
- Messages.
- User-Defined 1.
- User-Defined 2.
- Payment Options.
- Write-Off Info.
- Hierarchy.
- Product Catalog.
- Product Aliases.
- Additional Ship To Options.
- Ship Exception Dates.
- Carrier Acct Number (carrier account number).

Note. If the PeopleSoft Enterprise CRM installation is integrated with either PeopleSoft SCM or PeopleSoft Financial Management Solutions, you can access these pages through those applications.

The Products component in PeopleSoft SCM and PeopleSoft Financial Management Solutions uses these customer components, which are not available in CRM:

- Dun & Bradstreet.
- MICR Information.
- Corporate Customer Tree.
- Vendor Information.

- Corporate Tree Messages.
- Customer EFT Name (customer electronic funds transfer name).
- Quick Customer Create.

Note. You can access these pages through PeopleSoft SCM or PeopleSoft Financial Management Solutions if the PeopleSoft Enterprise CRM installation is integrated with those systems.

See Also

[Chapter 11, “Defining Person Business Objects,” Defining Consumer Information, page 154](#)

[Chapter 5, “Defining Purchasing Options for Companies, Consumers, and Sites,” page 69](#)

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Worker Data Integration

Use the Worker EIP to synchronize worker information with another system. In PeopleSoft Enterprise CRM, workers are people who work for you. When you implement the Worker EIP, application messages are published when a worker record in the PeopleSoft Enterprise CRM system is added or modified. PeopleSoft Enterprise CRM can also subscribe to Worker EIP application messages that are published when these records are modified in another system. The Worker EIP enables PeopleSoft Enterprise CRM to accept and create future dated workers that were created in another system and to which CRM subscribed.

Product Data Integration

Integrate product data using the PeopleTools 8.4 Integration Broker. This technology enables both synchronous and asynchronous messages to be transmitted using one technology. The PRODUCT_SYNC and PRODUCT_FULLSYNC messages are used to both publish and subscribe to data between PeopleSoft Enterprise CRM and PeopleSoft SCM or a third-party system.

Integrating from PeopleSoft SCM to PeopleSoft Enterprise CRM

PeopleSoft Enterprise CRM subscribes asynchronously to the PRODUCT_SYNC message that is coming from PeopleSoft SCM. This data is processed directly into the PeopleSoft Enterprise CRM product tables using Component Interfaces (CIs).

A product package header record is added for any kit components that are received from PeopleSoft SCM.

Integrating from PeopleSoft Enterprise CRM to PeopleSoft SCM

PeopleSoft Enterprise CRM publishes the PRODUCT_SYNC message whenever product data is added, changed, or deleted through the Product Definition (PROD_DEFN), Product Package (PRODKIT_SUMMARY), Pricing (PROD_PRICE), Package Pricing (PRODKIT_COMPS_PRICE), Notes (PROD_NOTE), Relationships (PROD_RELATIONS_CMP), and Product Attributes by UOM (product attributes by unit of measure; PROD_UOM) pages.

The Integration Broker processes the message and applies a transformation to remove the PRODKIT_HEADER.

Any package components that are themselves packages are also stripped from the message.

Because PeopleSoft SCM does not allow packages within packages, package components that are themselves packages are also stripped from the message.

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

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

Integrating from PeopleSoft Enterprise CRM to a third-party SCM database

PeopleSoft Enterprise CRM publishes the PRODUCT_SYNC message whenever product data is added, changed, or deleted through the Product Definition, Product Package, Pricing, Package Pricing, Notes, Relationships, and Product Attributes by UOM components. Integration Broker passes the message to the subscribing system.

Bill and Payment Data Integration

PeopleSoft Enterprise CRM integrates with Billing and Receivables to obtain billing information—invoices—and payments that are associated with a company, consumer, or contact. If a person is a contact of a company and that role is selected in the Role field in 360-Degree View, then the 360-Degree View EIPs retrieve invoices and payments for the company and not for the contact.

The PeopleSoft Enterprise CRM 360-Degree View can display invoices and payments under those nodes in the 360-Degree View tree. When you define these types of nodes on the Define Node page in PeopleSoft Enterprise CRM, you specify all of the necessary EIP details that are associated with that node.

To request invoices from PeopleSoft Billing, and for Billing to respond to the request, use the GET BILLS FOR 360 DEGREE VIEW EIP. This EIP consists of two application messages:

- BI_EIP360_REQ (request message)
- BI_EIP360_RSP (response message)

To request payments from PeopleSoft Receivables and for Receivables to respond to the request, use the GET ACCOUNT RECEIVABLES FOR 360 DEGREE VIEW EIP. This EIP consists of two application messages:

- AR_CRM_REQUEST (request message)
- AR_CRM_RESPONSE (response message)

All of the application messages that are used for integrating with 360-Degree View are synchronous.

PeopleSoft Enterprise CRM passes the request parameters for the request application message using an application class method. This table lists the application classes that PeopleSoft Enterprise CRM uses to pass the request parameters to Billing and Receivables:

PeopleSoft Application	Class ID	Class Path	Method Name
PeopleSoft Billing	EIP	RB_TD_360	PopulateBillRequestMsg
PeopleSoft Receivables	EIP	RB_TD_360	PopulatePaymentRequestMsg

See Also

PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook

Performance Considerations

When you integrate large amounts of data with other systems, system performance is slowed. The following tips might help.

Data Maintenance in Multiple Systems

If you have both PeopleSoft Enterprise CRM and PeopleSoft SCM databases, PeopleSoft recommends that you:

- Synchronize tables (such as Customer and Contacts) by running the FULLSYNC EIPs to perform a full batch publish to the subscribing system.

Note. In general, FULLSYNC messages first delete all existing data in the target record and then load a copy of the source record. For Company, Consumer, Contact, and Site FULLSYNC messages that come into PeopleSoft Enterprise CRM, no delete occurs; the data is merged into the existing data instead. This ensures data integrity within the PeopleSoft Enterprise CRM system.

- Update databases in the subscribing system by running SYNC EIPs to perform incremental updates. SYNC messages modify, delete, or add only the data that a user affected while performing an individual transaction.

Cascading Addresses

You can set a system option that automatically updates addresses on related business objects whenever you update an address on a parent business object. When you enable this option, each update that occurs also triggers an EIP to publish the address change to PeopleSoft SCM.

See [Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Contact Information for Business Objects, page 53.](#)

See Also

[Chapter 17, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” Establishing Master ID Databases, page 322](#)

[Chapter 17, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” Setting Up Defaults for Integrating Customer and Contact Information, page 317](#)

[Chapter 17, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” Market-Enabling Company, Consumer, Site, and Contact EIPs, page 320](#)

Setting Up Defaults for Integrating Customer and Contact Information

To set up defaults for integrating customer and contact information, use the Collector (COLLECTOR_TABLE), Credit Analyst (CR_ANALYST_TABLE), and General Options (RB_INSTALLATION) components.

This section discusses how to define default values for integrating customer and contact information.

Pages Used to Set Up Default Values for Integrating Customer and Contact Information

Page Name	Object Name	Navigation	Usage
Collector	COLLECTOR_TABLE	Set Up CRM, Common Definitions, Customer, Collector	Create and maintain collector codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.
Credit Analyst	CR_ANALYST_TABLE	Set Up CRM, Common Definitions, Customer, Credit Analyst	Create and maintain credit analyst codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.
Support Team Code	TEAM_CODE_TBL	Set Up CRM, Common Definitions, Codes and Auto Numbering, Support Team Codes, Support Team Code	Create and maintain support team codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.
Interface Defaults	RB_EIP_DEFAULTS	Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Interface Defaults	Specify default values on customer records for fields that are required for integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM.
Name Type Options	RB_NM_TYPE_DFLT	Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Name Type Options	Specify default name type values to use on company and contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM.
General Options	RB_INSTALLATION	Set Up CRM, Install, Installation Options, General Options	Specify default exchange rate codes to use on company and contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM and ensure that required codes are available to the EIP.

Creating and Maintaining Collector Codes

Access the Collector page.

Important! To ensure successful integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM, you must synchronize collector codes manually between PeopleSoft Enterprise CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP application messages that include codes that are not available in the subscribing system will fail.

Creating and Maintaining Credit Analyst Codes

Access the Credit Analyst page.

Important! To ensure successful integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM, you must synchronize credit analyst codes manually between PeopleSoft Enterprise CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP application messages that include codes that are not available in the subscribing system will fail.

Creating and Maintaining Support Team Codes

Access the Support Team Code page.

Important! To ensure successful integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM, you must synchronize support team codes manually between PeopleSoft Enterprise CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP application messages that include codes that are not available in the subscribing system will fail.

Specifying Interface Defaults

Access the Interface Defaults page.

When you create a customer or site record using the Company, Consumer, and Site components in PeopleSoft Enterprise CRM, the system automatically populates the record with the values that you enter on the Interface Defaults page. Users can select alternate values for these fields using the Bill Options view of the Customer Roles page, which is available in each of the components.

Specifying Name Type Defaults

Access the Name Type Options page.

Name Type Defaults page

PeopleSoft Enterprise CRM requires name type codes to create all business object records; however, PeopleSoft Financial Management Solutions and PeopleSoft SCM do not require name codes. To ensure that records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM are populated with name types that are valid in CRM, you specify default name type values here.

See [Chapter 3, “Defining Control Values for Business Objects,” Defining Business Object and Name Types, page 21.](#)

Company Name Type	Enter the default value to use for name type on company records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM. The system uses this value on customer records that are received through Customer (company, consumer, site) EIP application messages.
Person Name Type	Enter the default value to use for name type on contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM. The system uses this value on contact records that are received through Contact EIP application messages.

Specifying Default Exchange Rates

Access the General Options page.

Important! You must manually synchronize exchange rate codes between PeopleSoft Enterprise CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP Application messages that include codes that are not available in the subscribing system will fail.

Ensuring Required Code Availability

Access the General Options page.

Select the Collector/Credit Analyst Req check box. This prevents Customer (company, consumer, and site) EIP application message failures in PeopleSoft Financial Management Solutions and PeopleSoft SCM that are due to missing collector or credit analyst field values.

Market-Enabling Company, Consumer, Site, and Contact EIPs

To market-enable company, consumer, site, and contact EIPs, use the Market Control Codes (RB_MKT_CTL_DFN) and Market Installation Options (RB_MKT_CTL_TBL) components.

This section discusses how to specify the markets that PeopleSoft Enterprise CRM integrates with.

Pages Used to Market-Enable Company, Consumer, Site, and Contact EIPs

Page Name	Object Name	Navigation	Usage
Market Control Codes	RB_MKT_CTL_DFN	Set Up CRM, Common Definitions, Codes and Auto Numbering, Market Control Codes	Define market control codes for market-enabling the Customer (company, consumer, and site) and Contact EIPs.
Market Installation Options	RB_MKT_CTL_TBL	Set Up CRM, Install, Market Installation Options	Specify market options for a specific market or use with the Customer (company, consumer, and site) and Contact EIPs.
Build Customer Data Management (CDM) Interface Records	RB_INT_BUILD	Set Up CRM, Common Definitions, Integration Rules, Integration Utilities, Request Processes, Build CDM Interface Records	Run the Build CDM Interface Records Application Engine process (RB_INT_BUILD).

Defining Market Control Codes

Access the Market Control Codes page.

Enter a market control code name and a description. Use the Comments field to add any more information. These control codes are used on the Market Installation Options page.

Specifying Market Installation Options

Access the Market Installation Options page.



Market Installation Options page

Market Control Code Select the market control code.

Note. *CDMINTFC* is the market control code for CDM interface records.

Option Activated Select to activate the code.

Note. Use this page for market-enabling credit card information as well.

Building Business Object Relationship Model Interface Records

Access the Build CDM Interface Records page.

Click Run to run the Build CDM Interface Records process, which populates the interface records.

Establishing Master ID Databases

This section lists prerequisites and discusses how to set up master ID databases.

Prerequisites

You must first set up number type codes that relate object IDs to databases.

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

Pages Used for Establishing Master ID Databases

Page Name	Object Name	Navigation	Usage
Master ID DB Setup (master ID database setup)	RB_IDMASTER	Set Up CRM, Common Definitions, Integration Rules, Remote Data Access, Master ID Owner, Master ID DB Setup	Designate which systems have the source (or master) object IDs.
XML Test Utility	RB_XML_TEST	Set Up CRM, Common Definitions, Integration Rules, Remote Data Access, XML Test Utilities, XML Test Utility	Test calls between remote databases.

Designating the Systems That Have Master Object IDs

Access the Master ID DB Setup page.

Important! Use the Master ID DB Setup page to indicate the location of the master database that is responsible for issuing identifiers for customers, contacts, and so on. You *must* do this on all databases in the community except the master. Failure to do so may result in duplicate customer and contact identifiers.

Number Type

Select the objects whose IDs will be generated by the master database that appears in the Master Database URL (uniform resource locator) field. You can select the database for generating IDs for customers, contacts, products, sales orders, and quotes.

Master Database URL

Enter the database URL for the master database. When an application must obtain an identifier, it checks this field to see if there is a value. If there is no

value, then the system issues the identifier itself, because it is assumed that the database is the master. If there is a value, the system contacts the remote master database for the identifier.

Testing Calls

Access the XML Test Utility page.

XML Test Utility page

Transaction

Enter the identifier for the object whose ID generation you want to test. Enter *1* for customers, *2* for contacts, *3* for sales orders, *4* for quotes, and *5* for products. When you press Tab to exit the field, the system enters default values in the first three unlabeled text boxes.

The first unlabeled text box displays the setID or business unit for which the autonumber is to be generated; modify this if you like. Do not modify the other fields.

The second text box displays the next number to be generated. This is always *NEXT* by default; do not change the value.

The third field displays the zero padding indicator: *Y* (yes) to suppress leading zeros or *N* (no) to include leading zeros. You can modify this if you like.

The last two unlabeled fields are not used when testing autonumber generation.

Test

Click the Test button to fetch the next ID number from the external system. The result appears in the Text field. If the object's autonumbers come from the PeopleSoft Enterprise CRM system (and not an external ID master), the Text field displays the word *Local*.

Note. This test increments the number in the external system's database.

Mapping Message Data to PeopleSoft Enterprise CRM Records and Fields

This section discusses how to map message data to PeopleSoft Enterprise CRM records and fields.

Page Used to Map Message Data to PeopleSoft Enterprise CRM Records and Fields

Page Name	Object Name	Navigation	Usage
Message Data Mapping	RB_CLAF_MAP	Set Up CRM, Common Definitions, Process Automation, Message Mapping, Message Data Mapping	Map source fields to destination fields in PeopleSoft Enterprise CRM.

Mapping Message Data to PeopleSoft Enterprise CRM Records and Fields

Access the Message Data Mapping page.

Message Data Mapping

Message Name KP_KPI_ASMT_FACTS

***Status** Active

Effective Date 08/21/2002

Message Data Mapping Find | View All First 1 of 1 Last

+ -

Record To Update BC 🔍

Identification and Assignment

Fields to Update

Record Field to Update	XML Tag Name		
ASSESS_DESCR	ASSESS_DESCR	+	-
ASSESS_ID	ASSESS_ID	+	-
ASSESS_IMAGE_ID	ASSESS_IMAGE_ID	+	-
KPI_ID	KPI_ID	+	-
PCT_OF_TARGET	PCT_OF_TARGET	+	-
RESOLVED_VALUE	RESOLVED_VALUE	+	-

Record Identification

Record Field Name	XML Tag Name		
CUST_ID	OBJ_ID	+	-

Message Row Identification

XML Tag Name	XML Tag Value		
PF_OBJECT_TYPE	CUSTOMERMASTER	+	-

Message Data Mapping page

Note. You can define message mapping for message with single-level hierarchy only.

Message Name Displays the message against which you want to perform data mapping.

Record To Update Enter the record that needs to be updated upon receiving the message into the PeopleSoft Enterprise CRM system.

Fields to Update

Record Field to Update and XML Tag Name Select the fields to update along with the corresponding XML tags from the message that you plan to receive. The system updates the record fields with the value of the XML tag element from the received message.

Record Identification

Record Field Name and XML Tag Name Select a record field and corresponding XML tag. This criteria identifies the rows that must be updated when PeopleSoft Enterprise CRM receives the message from another system. The system uses these fields to construct the *where* condition depending on the record fields and values of the corresponding XML tags.

Message Row Identification

XML Tag Name and XML Tag Value Select the XML tags and XML tag values for the given message. This determines whether the message row qualifies with the given criteria to update the information into PeopleSoft Enterprise CRM.

In a message that you plan to receive, you may not want all of the rows to go to PeopleSoft Enterprise CRM. Using these fields, you can sparse (filter) those rows from the received message.

Message Mapping Example

Here is an example of a message:

```
<?xml version="1.0"?>
<KP_KPI_ASMT_FACTS>
  <Fieldpiece>
    <KP_KPI_PUBL_TBL class="R">
      <BUSINESS_UNIT type="CHAR"/>
      <PF_SCENARIO_ID type="CHAR"/>
      <FISCAL_YEAR type="NUMBER"/>
      <ACCOUNTING_PERIOD type="NUMBER"/>
      <KPI_ID type="CHAR"/>
      <OBJ_ID type="CHAR"/>
      <TRGT_RULE_TYPE type="CHAR"/>
      <PF_OBJECT_TYPE type="CHAR"/>
      <RESOLVED_VALUE type="NUMBER"/>
      <ASSESS_ID type="CHAR"/>
      <ASSESS_IMAGE_ID type="CHAR"/>
      <ASSESS_DESCR type="CHAR"/>
      <PERIOD_END_DT type="DATE"/>
      <PCT_OF_TARGET type="NUMBER"/>
      <STRETCH_GOAL type="NUMBER"/>
      <CURRENT_TARGET type="NUMBER"/>
      <CURRENCY_CD type="CHAR"/>
      <RESOLVED_IND type="CHAR"/>
      <KPI_CALCDTTM type="DATETIME"/>
      <KP_TREND_IND type="CHAR"/>
      <QTD_VALUE type="NUMBER"/>
      <YTD_VALUE type="NUMBER"/>
      <YEAR_OVER_YEAR_PCT type="NUMBER"/>
      <MONITOR_ONLY type="CHAR"/>
      <DESCR type="CHAR"/>
      <KP_USER_FLD1 type="CHAR"/>
    </KP_KPI_PUBL_TBL>
  </Fieldpiece>
</KP_KPI_ASMT_FACTS>
```

```

    <KP_USER_FLD2 type="CHAR"/>
    <PS_OWNER type="CHAR"/>
  </KP_KPI_PUBL_TBL>
  <PSCAMA class="R">
    <LANGUAGE_CD type="CHAR"/>
    <AUDIT_ACTN type="CHAR"/>
    <BASE_LANGUAGE_CD type="CHAR"/>
    <MSG_SEQ_FLG type="CHAR"/>
    <PROCESS_INSTANCE type="NUMBER"/>
    <PUBLISH_RULE_ID type="CHAR"/>
    <MSGNODENAME type="CHAR"/>
  </PSCAMA>
</FieldTypes>
<MsgData>
  <Transaction>
    <KP_KPI_PUBL_TBL class="R">
      <BUSINESS_UNIT>FSI01</BUSINESS_UNIT>
      <PF_SCENARIO_ID>1</PF_SCENARIO_ID>
      <FISCAL_YEAR>1998</FISCAL_YEAR>
      <ACCOUNTING_PERIOD>1</ACCOUNTING_PERIOD>
      <KPI_ID>1</KPI_ID>
      <OBJ_ID>200022</OBJ_ID>
      <TRGT_RULE_TYPE/>
      <PF_OBJECT_TYPE>CUSTMASTER</PF_OBJECT_TYPE>
      <RESOLVED_VALUE>11</RESOLVED_VALUE>
      <ASSESS_ID>11</ASSESS_ID>
      <ASSESS_IMAGE_ID>PS_COMPANY_ICN</ASSESS_IMAGE_ID>
      <ASSESS_DESCR>Green</ASSESS_DESCR>
      <PERIOD_END_DT/>
      <PCT_OF_TARGET>11</PCT_OF_TARGET>
      <STRETCH_GOAL>0</STRETCH_GOAL>
      <CURRENT_TARGET>0</CURRENT_TARGET>
      <CURRENCY_CD>USD</CURRENCY_CD>
      <RESOLVED_IND/>
      <KPI_CALCDTM/>
      <KP_TREND_IND/>
      <QTD_VALUE>4670</QTD_VALUE>
      <YTD_VALUE>4670</YTD_VALUE>
      <YEAR_OVER_YEAR_PCT>0</YEAR_OVER_YEAR_PCT>
      <MONITOR_ONLY/>
      <DESCR/>
      <KP_USER_FLD1>KPI</KP_USER_FLD1>
      <KP_USER_FLD2/>
      <PS_OWNER/>
    </KP_KPI_PUBL_TBL>
    <PSCAMA class="R">
      <LANGUAGE_CD>ENG</LANGUAGE_CD>
      <AUDIT_ACTN/>
      <BASE_LANGUAGE_CD>ENG</BASE_LANGUAGE_CD>
      <MSG_SEQ_FLG/>

```

```

    <PROCESS_INSTANCE>0</PROCESS_INSTANCE>
    <PUBLISH_RULE_ID/>
    <MSGNODENAME/>
  </PSCAMA>
</Transaction>
</MsgData>
</KP_KPI_ASMT_FACTS>

```

From this message and the mapping that is provided, you can determine the:

- Message name - KP_KPI_ASMT_FACTS
- Record to update

This message updates the BC table.

- Fields to update

The BC table fields ASSESS_DESCR, ASSESS_ID, ASSESS_IMAGE_ID, KPI_ID, and PCT_OF_TARGET are updated with the values of XML tags <ASSESS_DESCR>, <ASSESS_ID>, <ASSESS_IMAGE_ID>, <KPI_ID>, and <PCT_OF_TARGET> in the message.

- Record identification

Subscription code updates the row in the BC table if the CUST_ID field value equals the value of the XML tag <OBJ_ID> in the message.

- Message row identification

Message rows qualify if the value of the XML tag <PF_OBJECT_TYPE> is equal to *CUSTOMERMASTER*; otherwise, the message rows are ignored.

CHAPTER 18

Importing Data Into PeopleSoft Enterprise CRM

This chapter provides an overview of the Data Import Application Engine (AE) process (RBIMPORT) and discusses how to:

- Set up data import global settings.
- Define data import templates.
- Edit matching SQL
- Run the Data Import process.
- View the Data Import process status.
- Run the Basics Data AE process.

Understanding the Data Import Application Engine Process (RBIMPORT)

This section lists prerequisites and discusses:

- Data Import process steps.
- Matching SQL.
- When to use the Basics Data AE process to load basic data.

Prerequisites

Before you import data into PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM), ensure that:

- Sort the input file in key field order. For example, when you import multiple contacts to the same company, you must sort the input file on the *Company* field. This prevents duplicate BO_IDs from being assigned to the same company when all the matching criteria you specified are not met.
- The PeopleSoft super user ID has CREATE TABLE privileges for dynamic table creates.
- The FTP server is defined so it can store import file attachments.

To do this, modify the RB_IMP_ATTACH URL identifier by using the URLs - URL Maintenance page in PeopleTools.

See *Enterprise PeopleTools 8.48 PeopleBook: Server Tools*

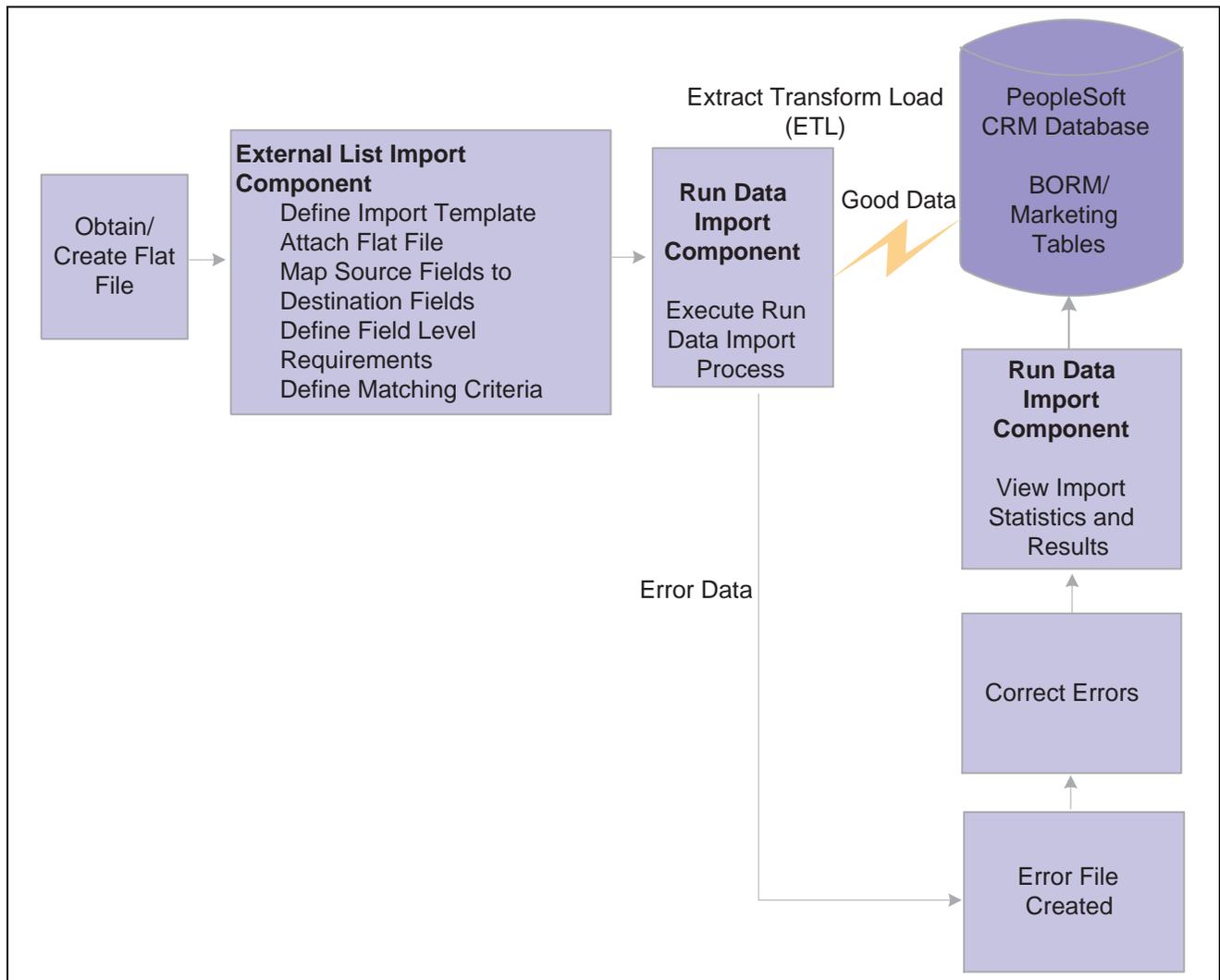
- You define data import global settings.

Data Import Process Steps

The Data Import process enables you to:

- Batch-load external data from other systems (in flat file format) into the PeopleSoft Enterprise CRM database. This is mainly used to load companies, contacts and consumers. You also can generate marketing lists from the data you load.
- Update existing individual and organization records with profile data for better targeting and personalization of marketing efforts.

Note. You cannot import profile fields of the *Text Block* data type, although you can import other fields in records that contain text block fields.



Data Import process flowchart

To import data into PeopleSoft Enterprise CRM:

1. Create a flat file with an accepted delimiter (tab, comma, or semicolon) for the import. Data import accepts flat files with rows that have a blank address, phone number, and email address.
2. Define an import template that uses the flat file.

The import template must specify:

- Identifying information, such as the template name, role of the imported data, import file fields, import file name, and optionally, audience.
- Specifications for mapping between input fields and database fields.
- Matching criteria, or the criteria for determining if the imported data matches existing database information.

3. (Optional) Validate the import template.

You can validate the template setup against the data file contents, by running the data import process with the File Validation Only check box selected.

The file validation step checks the file contents and structure and writes errors to an error file. You can use this file to correct any problems prior to importing data. Examples of validations are: length of fields in the import file compared to field lengths that are in the database, compatibility of data types, and number of delimiters in each row.

4. Run the import process.

You use the Data Import page to identify the import file, schedule the run, and specify import parameters.

5. View the status of the import process.

On the View Import Status page, you can view import dates, times, and statuses.

6. View import results including statistics on the number of inserted, matched, updated, and in-error import rows.

7. Correct data errors that prevent records from successfully loading and run the Data Import process again.

Matching SQL

When the Data Import process runs, it dynamically builds SQL statements that match input files with database fields, based on the matching criteria that you enter. These statements are stored in the stage and matching tables. When you schedule the Data Import process, you can choose to keep these tables and later fine tune the generated SQL to improve data import performance.

Important! You should perform this function only with the assistance of qualified consultants.

One bad change may render the whole Data Import process to be not functional.

See Also

[Chapter 2, “Understanding Business Object Relationship Model Components,” Business Object Relationship Modelling, page 7](#)

When to Use the Basics AE Process to Load Basic Data

The Data Import process automatically updates the basic data tables if you have selected the Process Basic Data Summary option on the CDM System Options page. However, situations might arise when you cannot use the Data Import process, for example:

- During initial data load.
- When you enable a new role or relationship.

- If you are updating the BORM from legacy systems and choose not to use the PeopleSoft-provided APIs.

In these cases, you must use the Basic Data Load Application Engine process (BO_BASICCS) to update basic data.

See Also

Chapter 2, “Understanding Business Object Relationship Model Components,” page 7

Setting Up Data Import Global Settings

To set up data import global settings, use the Data Import Global Settings (RB_IMP_GLB_SETUP) component. This section discusses how to define data import global settings.

Page Used to Set Up Data Import Global Settings

Page Name	Object Name	Navigation	Usage
Data Import Global Setup	RB_IMP_GLB_PG	Customers CRM, Data Import, Data Import Global Settings, Data Import Global Setup	Define global settings that are for the Data Import process.

Defining Data Import Global Settings

Access the Data Import Global Setup page.

The screenshot shows the 'Data Import Global Setup' page with the following fields and options:

- Default SetID:** SHARE
- Currency Code:** USD
- Last Object Id Sequence:** 2
- Stage Table Generation:**
 - Dynamic Record Creation
 - Auto number
 - Stage Table Name Prefix:** STG
 - Last Stage Table Sequence:** 13
 - Tablespace Name:** RDWORK
 - Dynamic Index Tablespace Name:** (empty)
 - Run Security AE

Data Import Global Setup page

Default SetID	Enter the default setID. The Data Import process enters the default setID on any target table that requires a set ID while it processes import data. Examples of tables which require setIDs are: RD_PERSON and RD_COMPANY.
Currency Code	Enter the default currency code, which the Data Import process uses for target tables that require a currency code.
Last Object Id Sequence	Enter a starting integer. Use this field when you create object IDs that are not system-generated. The format of generated IDs is <i>sequence number:counter</i> . For example, if the starting sequence number is 1, and you import a file with 100 companies, the format of the generated IDs is 1:1 through 1:100. A subsequent load of 50 company objects generates IDs 2:1 through 2:50.
Run Security AE(Run Security Application Engine)	Select this check box to run the security AE process against imported data. If this is not selected, imported data will not be available for applications that utilize application security.

Note. You can run the security AE against the entire database at a later time to make this data available.

Stage Table Generation

Dynamic Record Creation	Indicates that tables are dynamically created during the Data Import process, which executes many CREATE TABLE statements during processing. This is necessary to stage the imported data and to perform matching logic. You cannot edit this field.
	Note. The PeopleSoft super user ID must have Create Table privileges for the process to complete successfully.
Auto number	Select to enable automatic number generation for imported data. See <i>PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook</i> , "Setting Up General Options," Setting Up Automatic Numbering.
Stage Table Name Prefix	Enter the prefix for the staging tables. The staging tables are defined as <i>prefix_numeric value</i> (for example, STG_215). The system assigns numeric values in sequential order.
Last Stage Table Sequence	Enter a new sequence number, or leave the default, which is the last stage table sequence that the system creates. The system automatically assigns table sequences during the Data Import process. If you enter a new number, the system uses that number as its starting point in the process.
SQL Space Name	Enter the tablespace name under which you want the system to create the staging tables. PeopleSoft Enterprise CRM provides the predefined table space name (RDWORK).

Note. When performing the Data Import process on an Oracle or DB2 platform, you must define a SQL space name.

Dynamic Index Tablespace Name	Select <i>PSINDEX</i> for Oracle databases and <i>PSSGIXPT</i> DB2. Tablespace fields are enabled for DB2 and Oracle databases only.
--------------------------------------	--

Note. If you need to specify a different tablespace, you must manually enter it in Query Analyzer.

Defining Data Import Templates

To define data import templates, use the Data Import (RB_IMP_DATA_CONFSR_GBL) component.

This section discusses how to:

- Access data import templates.
- Define data import templates.
- Define import files.
- Map source fields to target fields.
- Specify concatenated fields.
- Define matching criteria.
- Verify template creation.

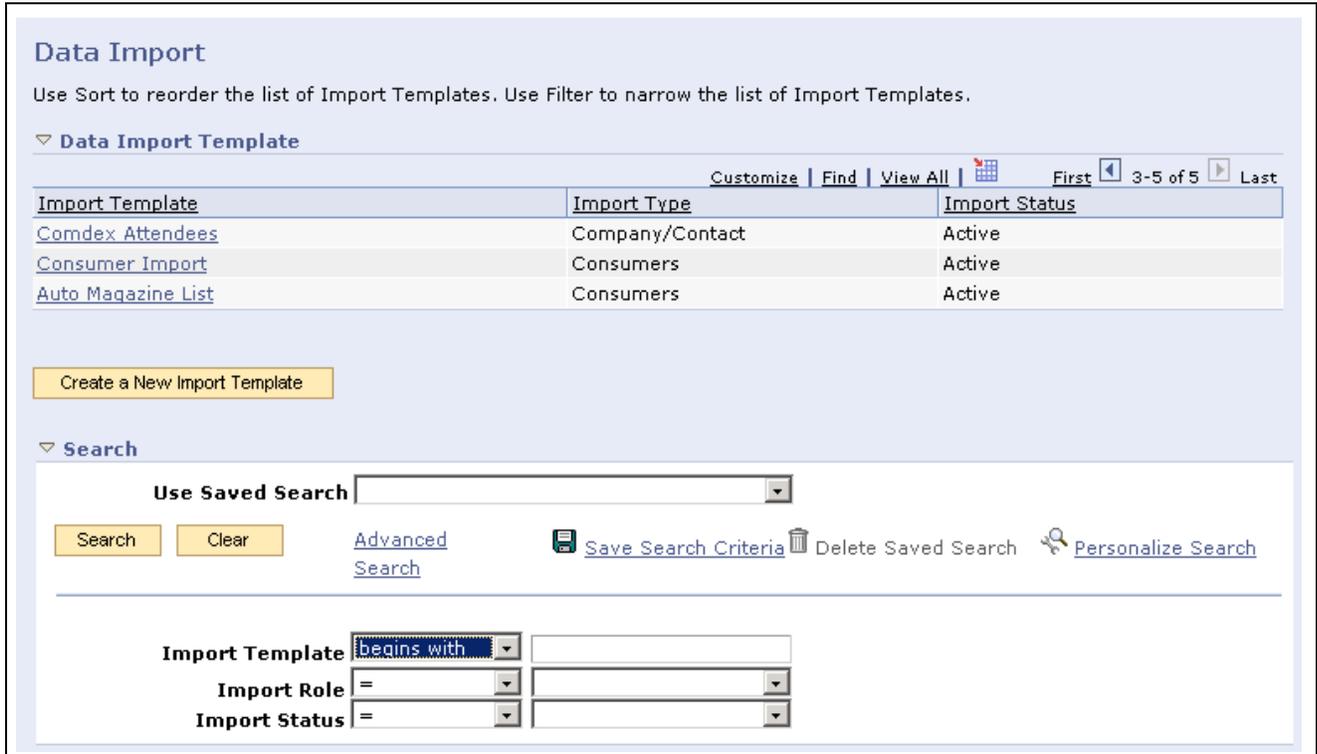
Pages Used to Define Data Import Templates

Page Name	Object Name	Navigation	Usage
Data Import	RB_IMP_DATA_CONFSR	Customers CRM, Data Import, Data Import Templates, Data Import	Access a data import template to modify or add a new template.
Data Import - Step 1: Define Import Template	RB_IMP_HEADER	<ul style="list-style-type: none"> • Click the Create a New Import Template button on the Data Import Template Search page. • Select an existing template on the Data Import Template Search page. • Click the Go Back to Import Definition button on the Save Confirmation page. • Customers CRM, Data Import, Run Data Import, Run Data Import Search <p>Click the View Import Definition link on the Run Data Import page.</p>	Define general information and the role with which the imported data is associated. The role determines the target field tree that appears at mapping time.

Page Name	Object Name	Navigation	Usage
Audiences - Audience Details	RA_LIST_MAIN	 Click the Transfer to Audience button on the Data Import - Step 1: Define Import Template page.	Describe the audience for the imported data. For use in PeopleSoft Marketing, you must specify an audience of type <i>Internal using Import</i> . See <i>PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook</i> , "Using Audiences," Creating and Managing Audiences.
Data Import - Step 2: Define Import File	RB_IMP_FILESPEC	Click the Next button on the Data Import - Step 1: Define Import Template page.	Associate the flat file of data and load the header fields from the flat file to the import template. Optionally, assign user-friendly labels to the header fields.
Data Import - Step 3: Mapping	RB_IMPORT_MAP	Click the Next button on the Data Import - Step 2: Define Import File page.	Map the source fields that are contained in the flat file to the target fields in the PeopleSoft Enterprise CRM database and define the field requirements.
Data Import - Select Target Field	RB_SEL_MAP_IN_FLD	Click the Select Target link next to a Field Label on the Data Import - Step 3: Mapping page.	View the target fields in a tree format to assist with target field selection in the mapping process.
Specify Concatenation	RB_MAP_CONCAT	Select a Mapping Action of Concatenate in the Advanced region of the Data Import - Step 3: Mapping page and click the Specify Concatenation link.	Specify the fields and values that are concatenated to form the target field.
Data Import - Step 4: Matching	RB_IMP_MATCH_ADV	Click the Next button on the Data Import - Step 3: Mapping page.	Define the matching rules for the import data. For example, define which existing field or set of fields in the PeopleSoft Enterprise CRM database you want to specify as constituting a match for an individual or organization record.
Matching Secondary Page - Select Target Field page	RB_MATCH_SEL_FLD	Click a link in the Select Target column on the Data Import - Step 4: Matching page.	Select the database field where the import field is stored.
Save Confirmation	RB_IMP_CONF_PG	Click the Save Import Template button on the Data Import - Step 4: Matching page.	Verify import template creation.

Accessing Data Import Templates

Access the Data Import page.



Data Import page

The appearance, behavior, and personalization options for this page are controlled by the search definition for the Data Import Template component.

Create a New Import Template

Click to access the Data Import - Step 1: Define Import Template page and create a new import template.

Defining Data Import Templates

Access the Data Import - Step 1: Define Import Template page.

Data Import - Step 1: Define Import Template page

Import Role

Select the role to associate with the import template. All records that are in the file are imported into the CRM database with the selected role. Values are:

- *Company*: Select for company or partner company records including sites for the company.
You must import sites in the context of a company by using the *Company* template.
- *Company/Contact*: Select for individual records for persons who function as contacts for companies.
- *Consumers*: Select for persons who do not function as contacts for companies.

Note. The role that you select here determines the objects to which you can map. For example, if you select *Consumer*, the only fields that are available to map to are those that are defined for the Consumer role.

Source

Enter the source of the information that is contained in the flat file. This field is associated with the template and not with individual records that are in the file. To associate a source with each record, create a text profile field that is called Source and use the Data Import - Step 3: Mapping page to map a constant value into the field.

Import Status

Displays the import status that the system assigns when you begin to create an import template. Initially, the status is *In Process*. It stays as such until you complete the steps to define an import template, at which time it changes to *Active*.

Next

Click to access the Data Import - Step 2: Define Import File page and proceed to the next page in the import definition process.

Import as Audience

You can create audiences only for import data with the *Consumer* or *Company/Contact* role types.

The Data Import process imports only contact methods with the type of *Home* when creating audiences with the *Consumer* role. Other contact method types, such as *Business*, are ignored. This conforms to the requirements of the Marketing product.

Audience Name

Select an existing audience or click the Transfer to Audience button to define a new audience. The selected audience must have source of *Internal Using Import* and has a status of either *In Design* or *Designed* to import the data into the PeopleSoft CRM database as a discrete audience.

If you import the records as an *Internal Using Import* audience, you can use the audience immediately after import. However, you can't further segment the audience in the Audience Builder. If you want to do further segmentation rather than create an audience at the time of import, create a text profile field called Audience Source, and use the Mapping step to map a constant value in that field for all records. After import, create an internal audience by using the Audience Builder with the first condition "all records that are equal to the constant value that is mapped into the profile field called Audience Source."

Defining Import Files

Access the Data Import - Step 2: Define Import File page.

Data Import

1
2
3
4

Step 2: Define Import File

Import Template: Company/Contact Import

File Information

File stage_test3.csv

View File
Delete File

Delimiter Comma

Header
 No Header

Skip Lines 1

Header Row 1

File Field List Customize Find View All First 1-4 of 4 Last

Field Name	Field Label
Company	Company
Fname	Fname
Lname	Lname
WorkEmail	WorkEmail

List Fields From File
<< Back
Next >>

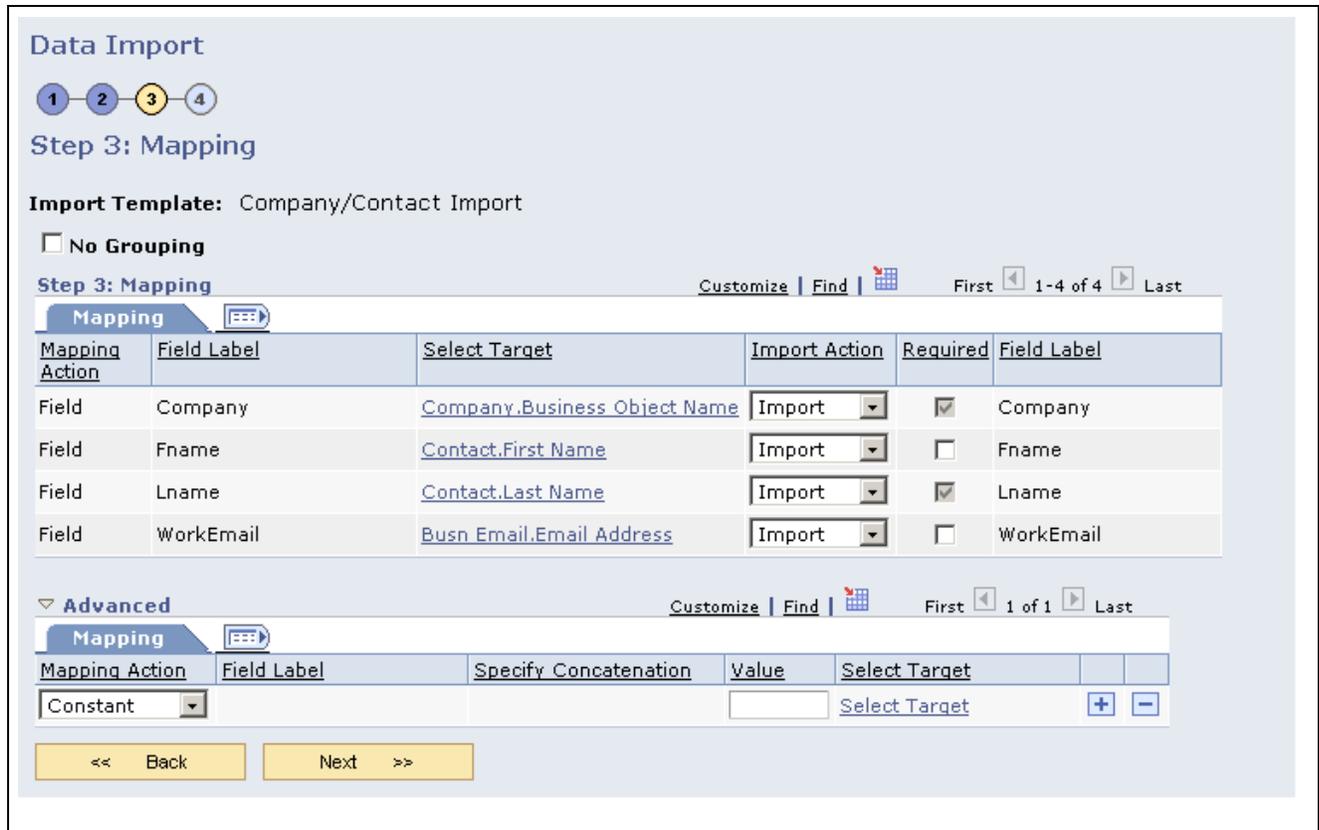
Data Import - Step 2: Define Import File page

On initial access to this page when you are defining a new template, the Attach File button is available; the rest of the fields are empty. The Delete File and View File buttons are not available until you attach a file.

Attach File and View File	Click to browse for and upload a file that contains import data. The Attach File button appears when you first access the page to define a new template; after you upload a file, the button text changes to View File.
Delete File	Click to delete the attached file.
Delimiter	Select the flat file delimiter <i>Comma</i> , <i>Semicolon</i> , or <i>Tab</i> .
Header and No Header	Select to indicate the presence or absence of a header row in the flat file.
Header Row	Enter the header row location in the field. If you do not enter a header row number, it defaults to <i>1</i> .
Skip Lines	Enter the number of blank rows in the flat file.
List Fields From File	Click to list the field names and labels from the flat file. If the flat file contains a header row, the system populates the Field Name column with the exact names of the fields (for example, <i>Iname</i> and <i>fname</i>) that are contained in the header row of the flat file's header row. The system also populates the Field Label fields with the same information as shown in the field name fields. If the flat file doesn't contain a header row, the system populates these columns with <i>FIELD1</i> , <i>FIELD2</i> , and so on until all of the flat file fields are represented. Change the field labels to represent more meaningful and understandable names to the flat file fields. For example, you might change the <i>Iname</i> field label to <i>Last Name</i> .

Mapping Source Fields to Target Fields

Access the Data Import - Step 3: Mapping page.



Data Import - Step 3: Mapping page

When you access this page, the source field labels appear in the Step 3: Mapping scroll area, and the Advanced scroll area is collapsed.

You must map at least one source field from the flat file to a target field in the CRM database and you must map all required fields (required fields have an asterisk at the end of the field name in the folder tree view).

If you can perform one-to-one mapping of the source fields to the target fields, use the Mapping scroll area only.

To use a default constant in a target field, concatenate source fields into one target field, or enter a source field into multiple target fields, use both the Mapping and Advanced scroll areas.

No Grouping

To give you more control over what fields Data Import considers unique when two or more continuous rows have the same data, PeopleSoft CRM added the No Grouping check box.

For example, when importing the following data:

FIRST NAME	LAST NAME	EMPLID
Joe	Smith	123
Joe	Smith	124

Data Import considers First Name and Last Name unique, and therefore will only insert one row and update the EMPLID to 124. If you, however, select the No Grouping check box, the system inserts or matches on every row.

Selecting Target Fields

Select Target Click to select the database field that is updated by the input field or by an advanced mapping action.

When you click this link, a hierarchical tree structure appears with required fields marked by an asterisk (*). The hierarchy differs depending on the role that you selected for the import template. At each folder level, there are required fields. If any field in the folder is mapped, then you must map the required fields in that folder and in the folders above it. The required fields provide the concatenated key to the target fields.

In the example below, the import role is *Company* and the source file field is *Work Email*. The *Business Object Name* field in the *Organization - Company* folder is required.



Data Import - Select Target Field page (1 of 2)

An intermediate level in the hierarchy, *Contact*, is not shown. The *Lname* field in the *Contact* folder is required and selected. The target field, *Email Address* is defined in the lowest level folder, *Business Email-Contact*.



Data Import - Select Target Field page (2 of 2)

Mapping Source Fields to Target Fields

To map the source flat file fields to target fields, use the Step 3: Mapping page region. Select a target for each field on the import file.

Ignore Select to ignore this field and not import it when you perform the import process. This is useful for when you reuse import templates and want to import only a subset of the premapped fields.

Import Select to import this field when you perform the import process.

Advanced Mapping Actions

The advanced mapping actions enable you to update database records when there is not a one-to-one correspondence between database fields and fields in the import file.

Mapping Action

Select one of:

- *Concatenate*
- *Constant*
- *Field*

Select to concatenate two or more fields or values to form the target field.

Select to specify map an already-mapped field from the import file to another target field.

Value

Enter the constant value with which to populate the target field. For example, if *Country* is a field in the database, and all input records are for *France*, you would enter a value of *FRA*.

This field appears only if you select a mapping action of *Value*.

To enter data, time, or date values, please consult the Enterprise PeopleTools PeopleBooks to determine the correct formats.

Specify Concatenation

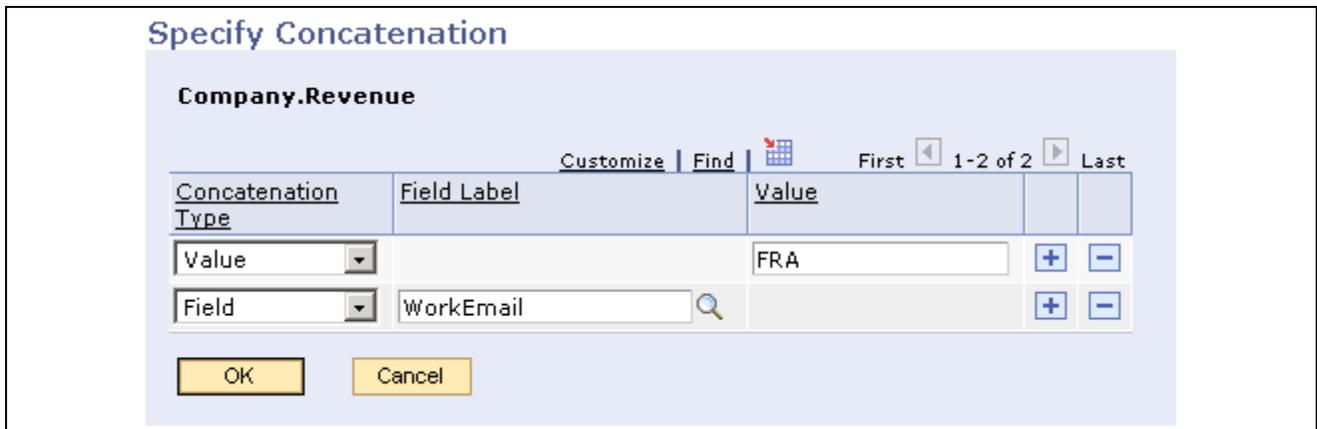
Click to access the Specify Concatenation page, where you can select the fields and values that are concatenated to form the target field.

Field Label

Select the field that is to be mapped to the target field from the available choices.

Specifying Concatenation

Access the Specify Concatenation page.



Specify Concatenation page

Concatenation Type

Select *Value* to specify a constant in the Value column and *Field* to select from the import field labels in the Field Label list.

Defining Matching Criteria

Access the Data Import - Step 4: Matching page.



Data Import - Step 4: Matching page

This page enables you to specify the database fields that must match fields in the import file to update the database from the import file. If no match is found, the system inserts the incoming row as a new record in the CRM database. If a match is found, the system updates the existing record with new information from the file. You can override the update by clearing the Update Matched Records check box when running the import process. In that case only, the system writes matched records to the error file.

New data never overwrites or updates an existing record’s contact method fields (phone, email, and address); the new fields are appended as additional contact methods. All other types of mapped fields are updated or overwritten by the new data for matched records.

Warning! All fields, including email address, are case sensitive for matching. To avoid instances where a match is not found due to case sensitivity, you should convert fields such as email address to lowercase prior to import. For example, convert Joe_Smith@ABC.com to joe_smith@abc.com before importing the file.

Matching Logic

Each template’s matching criteria consists of one or more OR conditions, each of which contains an AND condition or a single field that must match. For example, in the condition shown, either all three of the fields, *Busn_Email.Email Address*, *Contact.Last Name*, and *Company.Business Object Name* must match their corresponding database fields or both of the fields *Company.Business Object Name* and *Busn_Email.Email Address* must match the database fields.

Note. You cannot nest conditions.

Add 'OR' Condition Click to add an *or* condition to the statement.

Note. You might see matching statements with conditions that are separated or nested using parentheses. These statements were developed in a previous version of PeopleSoft CRM. For upward compatibility, these statements behave the same as they did in previous versions. However, if you make any changes to the statement, you must enter it in the new format

Verifying Template Creation

Access the Save Confirmation page.

This page displays:

- A message that indicates if the template is saved successfully.

The Import status is set to *Active*.

- The Run Data Import link.

Click this link to access the Run Data Import page and immediately run the import process.

- The Go Back to Import Definition link.

Click this link to access the Data Import - Step 1: Define Import Template page and view the existing template and make any necessary changes.

Editing Matching SQL

To edit matching SQL, use the Edit Matching SQL (RB_IMP_MATCH_EDIT) component.

This section discusses how to:

- Select a statement for edit.
- Edit a statement.

Pages Used to Edit Matching SQL

Page Name	Object Name	Navigation	Usage
Edit Matching SQL	RB_EDIT_MATCHING	Customers CRM, Data Import, Edit Matching SQL	Select a SQL statement for editing.
Edit SQL page for Data Import	RB_EDIT_SQL	Click the Edit button for any SQL statement on the Edit Matching SQL page.	Edit a SQL statement.

Selecting a Statement for Editing

Access the Edit Matching SQL page.

Edit Matching SQL						
Import Template Bear Contacts						
Customize Find 						
First  1-104 of 104  Last						
Step	Edit	SQL Statement	Minutes	Start Date/Time	End Date/Time	User modified
1		INSERT INTO PS_RB_STG_TGT_VAL SELECT DISTINCT '810347954560917281803629052240', 'BO_ID', '', '', S1.BO_ID , T1.BO_ID_2 FROM PS_STG2 S1, PS_TGT_COMPANY_VW T1 WHERE T1.SETID = 'CRM01' AND S1.BO_NAME = T1.BO_NAME AND NOT EXISTS (SELECT 'X' FROM PS_RB_STG_TGT_VAL Z WHERE Z.RUN_CNTL_ID = '810347954560917281803629052240' AND Z.FIELDNAME = 'BO_ID' AND Z.VALUE_NBR_FROM = S1.BO_ID)	0	05/10/2005 5:01:40PM	05/10/2005 5:01:40PM	
2		INSERT INTO PS_RB_STG_TGT_VAL SELECT DISTINCT '810347954560917281803629052240', 'BO_ID', '', '', S1.BO_ID , T1.BO_ID FROM PS_STG2 S1, PS_TGT_COMPANY_VW T1 WHERE T1.SETID = 'CRM01' AND S1.BO_NAME = T1.BO_NAME AND NOT EXISTS (SELECT 'X' FROM PS_RB_STG_TGT_VAL Z WHERE Z.RUN_CNTL_ID = '810347954560917281803629052240' AND Z.FIELDNAME = 'BO_ID' AND Z.VALUE_NBR_FROM = S1.BO_ID)	0	05/10/2005 5:01:40PM	05/10/2005 5:01:40PM	

Edit Matching SQL page

This page enables you to view SQL statements and their processing time from the last run of the data import template. You can select a statement and edit it.

Editing Statements

Access the Edit SQL page for Data Import page.

Edit SQL page for Data Import

Operation INSERT INTO PS_RB_STG_TGT_VAL

SubSelect SELECT DISTINCT '810347954560917281803629052240', 'BO_ID', '', '', S1.BO_ID , T1.BO_ID

From Clause FROM PS_STG2 S1, PS_TGT_COMPANY_VW T1

Where Clause WHERE T1.SETID = 'CRM01' AND S1.BO_NAME = T1.BO_NAME AND NOT EXISTS (SELECT 'X' FROM PS_RB_STG_TGT_VAL Z WHERE Z.RUN_CNTL_ID = '810347954560917281803629052240' AND Z.FIELDNAME = 'BO_ID' AND Z.VALUE_NBR_FROM = S1.BO_ID)

Edit SQL page for Data Import page.

Use this page to cut and paste the SQL statements to Query Analyzer, tune it, and replace new SQL statement with the tuned statement.

For example: an administrator runs a Data Import job with the Keep Tables option selected. After the job completes or aborts due to performance issues, the administrator can access this page to review the SQL statements to see how long each one took and start tuning those ones that took a long time.

When finishing editing, the administrator saves the matching SQL and can rerun the same Data Import template.

Running the Data Import Application Engine Process (RBIMPORT)

This section discusses how to:

- Access the Run Data Import page.
- Run the Data Import Process.

Pages Used to Run the Data Import Application Engine Process (RBIMPORT)

Page Name	Object Name	Navigation	Usage
Data Import	RB_IMP_RUN_CONFSRC	Customers CRM, Data Import, Run Data Import, Data Import	Search for and view existing templates to use for the Data Import process.
Data Import	RB_IMP_RUN_DATA_PG	<ul style="list-style-type: none"> • Click the Save Import Template button on the Data Import - Step 4: Matching page. Click the Run Import link on the Save Confirmation page. • Select an existing template on the Run Data Import Search page and click the Import Data button. 	Run the Data Import process.
Import Multiple Files	RB_IMP_MULTI_FILES	Click the Process Additional Files button on the Data Import page.	Search for and upload additional files for data import.

Running the Data Import Application Engine Process (RBIMPORT)

Access the Data Import page.

Data Import

Import Template Consumer Import

File Information

File

[Attach File](#) [Process Additional Files](#)

File Validation Only # of Additional Files 0

Delimiter Comma **Skip Lines** 1

Header **Header Row** 1

No Header **Character Set** ANSI

Schedule Now Future **Date** 05/13/2005 **Time** 9:49:05AM

Import Options

*SetID

Update Matched Records

Import Contact Methods as Primary

Overwrite Many-Rows Profile

Stage and Matching Options

Reuse Tables **Keep Tables** **Delete Old Tables**

▶ **File Field List**

▼ **Import as Audience (optional)**

*SetID

Audience Name

Data Import page (1 of 2)

Import Status

User INF_DEV

Date 05/17/2005 **Time** 10:21:21AM

File Company-contact_data.csv

Status Queued

[Refresh Status](#) [View Import Statistics](#)

Data Import page (2 of 2)

File Information

Attach File and View File

Click to access a page where you can search for and upload the import file. After you attach a file, the button text changes to *View File*.

Process Additional Files	Click to upload one or more additional flat files. The system processes all attached flat files in parallel; this enables you to speed up the data import process by breaking up one large file into smaller files.
File Validation Only	<p>Select to perform data validation tests of the Data Import process before you actually perform the process. This is a preventative step that is useful for new files from unknown vendors.</p> <p>This option runs the Data Import process to validate data types that are within the file but doesn't perform the data update. For example, if a character string is mapped into a number field or a mapped date is not in the correct format, an error occurs. The process also checks for whether mapped fields are longer than the target field. The end result is an error file that contains all of the input rows with detailed error messages so that you can make corrections.</p>
Schedule	Select Future and enter a date and time when the Data Import process is to run, or select Now. If you enter a past date, the system runs the process immediately.
Character Set	Select the input data file type, for example, <i>UTF8</i> . All installed character sets are available for selection.
Update Matched Records	<p>Select to specify that target data is updated with source data from the flat file when there is a match between a source record and an existing target record in the database. The rules that you set up on the Data Import - Step 4: Matching page determine the match.</p> <p>If you do not select this check box, you must view the error file to see a list of the records that match but are not updated.</p> <p>See Chapter 18, "Importing Data Into PeopleSoft Enterprise CRM," Viewing the Status of One Data Import Process Instance, page 350.</p> <hr/> <p>Note. Contact method fields are never updated with imported data; instead, the new information is added to the database.</p> <hr/>
Import Contact Methods as Primary	<p>Select to enforce that an imported contact method is checked as <i>Primary</i>. This overwrites existing primary flags in the PeopleSoft CRM database. If you do not select this check box (which is cleared by default), the system still imports all mapped contact methods, but none are flagged as <i>Primary</i>.</p> <p>Every PeopleSoft CRM business object supports multiple contact methods of each type. For example, a contact or consumer that is named John Doe can have multiple business email addresses, multiple home phone numbers, and so on. However, John Doe can have only one primary home phone number.</p>
Overwrite Many-Rows Profile	Select to overwrite existing data if multiple rows of information can exist for a business object, for example, contact methods for a customer. If not selected, the Data Import process inserts new database records with the imported data.
Reuse Tables	Select to use existing stage and matching SQL tables that were generated in a previous run of the template.
Keep Tables	Select to retain the stage tables. This option is selected and disabled by default if the Reuse Tables option is selected.

Delete Old Tables Select to remove all previous versions of the stage and matching tables, but keep the current one. This option is selected by default if stage and matching tables exist from a previous run.

Import Data Click to run the Data Import process and open the Import Status group box, which displays the status of the Run Data Import process and contains a View Import Statistics link.

File Field List

The File Field List screen region displays the fields that are associated with the import template. This enables you to verify whether the import works in the case where you access the Data Import process directly from the menu and use an existing template.

Import As Audience

The fields in this section function similarly to the identical fields on the Define Import Template page. Values that you enter override the value on the import template.

Import Status

The Import Status group box appears only after you click the Import Data button.

View Import Statistics Click to access the View Import Statistics page.

Note. New contacts that are imported for existing companies are reported as updates because this updates the company's contact data.

Viewing the Data Import Process Status

This section discusses how to view the status of the Data Import process.

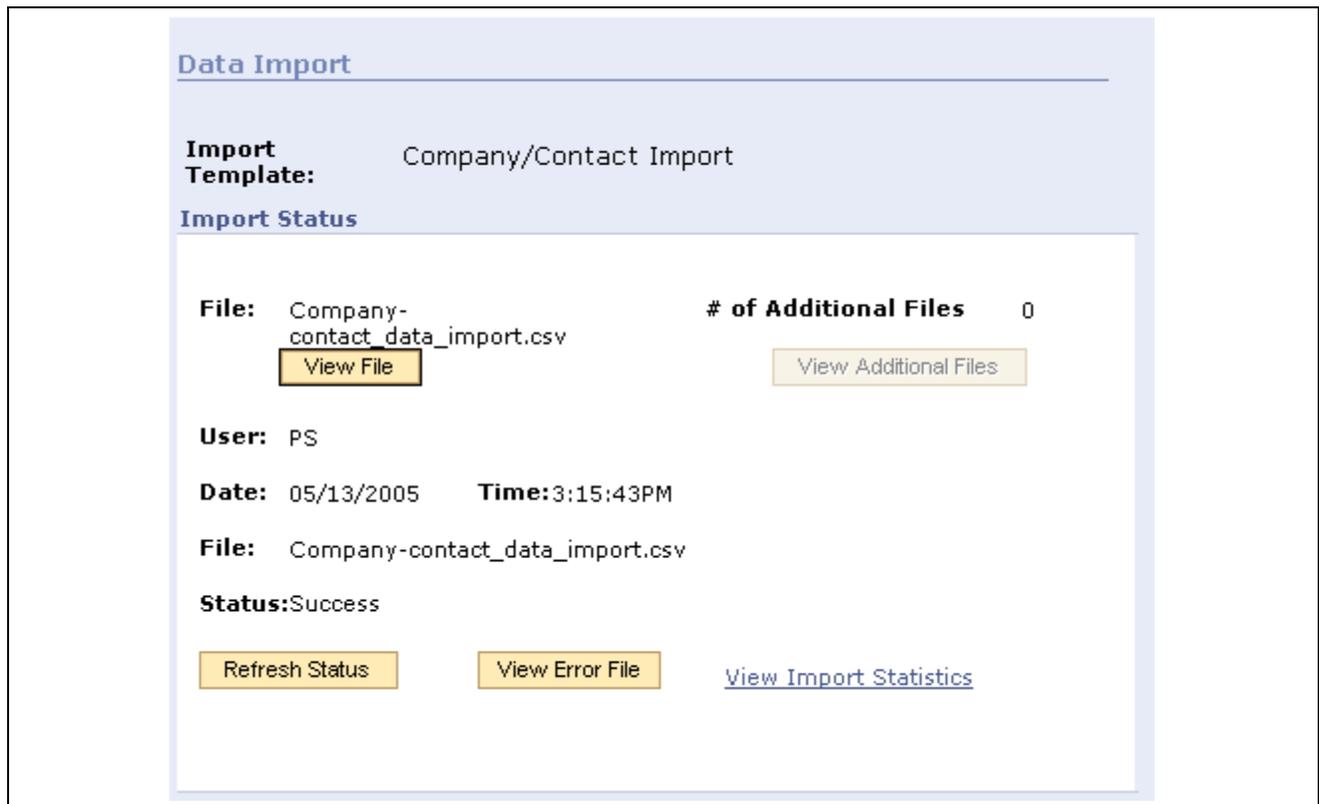
- View instances of the run date import process.
- View the status of one data import process instance.
- View import statistics.
- View the data import process file error.

Pages Used to View the Data Import Process Status

Page Name	Object Name	Navigation	Usage
Data Import	RB_IMP_VIEW_CONFSR	Customers CRM, Data Import, View Import Status	View instances, or runs, of the Run Data Import process.
Data Import	RB_IMP_VIEW_STATUS	Select an instance of the Run Data Import process on the View Import Status Search page.	View the status of one instance of the Data Import process.
View Import Statistics	RB_IMP_VW_STATS	Click the View Import Statistics link on the Run Data Import page or the View Import Status page.	View import statistics.

Viewing the Status of One Data Import Process Instance

Access the Data Import page.



Data Import page

View File

Click to view the flat file that is used for the Data Import process.

View Error File

Click to download and view the error log file that the Data Import process creates. The error log contains details about the rows that are in error so that you can fix them and rerun the process. If the Update Matched Records option is not selected on the Data Import page, the error log also contains a listing of the records that match but are not updated.

View Import Statistics Click to access the View Import Statistics page and view the import statistics, number of rows inserted, updated, and matched, and the total number of records that are processed.

Viewing Import Statistics

Access the View Import Statistics page.

This page displays the import statistics from the Data Import process.

View Process Monitor Click to access the Process Monitor - Process List page and monitor the Data Import process in detail.

See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler*

View Error File Click to download and view the error file that the Data Import process creates. The error file contains details about the rows that are in error so that you can fix them and rerun the process, if desired.

Viewing the Data Import Process Error File

Access the error file.

The error file looks just like the input flat file except that after every row there are messages about what is wrong with the input row. Correct the problems with data on this error file and then rerun the Data Import process by using this file.

Running the Basics AE Process

This section provides an overview of the Basics AE process (BO_BASIC_S) and discusses how to:

- Disable unnecessary roles, relationships, and contact methods.
- Optimize database performance.
- Submit the Basics process.

Understanding the Basics AE Process

The Basics AE process reduces the complex tables and relationships contained in the BORM to two flat tables, *BO_BASIC_IND* (for data that is related to individuals) and *BO_BASIC_ORG* (for data that is related to organizations). For every customer business object that is enabled for Basics by role or relationship, the Basics AE finds all related business objects and writes the information to the relevant tables for use by the PeopleSoft Enterprise Online Marketing, Marketing, and Mobile Sales products

For example, a customer company has four sites, each site has four contacts, and each contact has four contact methods. The process locates 64 (four times four times four) business objects to get contact information for the customer and organizes this information into a single *BO_BASIC_IND* record per role and relationship type keyed by the customer's business object identifier (*BO_ID*), role, and relationship ID. Rows for both the company and the site are populated in the *BO_BASIC_ORG* table.

On a large database, for example seven million rows, this process might run for several hours. You can significantly improve the performance of this process by enlisting the services of qualified implementation consultants or a database administrator (DBA). Working with these persons, you can tailor the Basics AE process to meet specific enterprise requirements and improve process performance.

The Contact Methods displayed in the Audience result grid are taken directly from the Basic Data tables. In order to show values for all the Contact Methods in the Audience result grid, Contact/Consumer Contact Methods must be setup to follow the corresponding mapping logic for Basic Data.

Step 1: When adding a person, you should ignore the description field, and concentrate on the Type fields. After doing that, keep in mind that the first data entry you make defaults to the primary contact information for all roles.

Step 2: Go to the Advanced Options section of the Address Book, and manually define the primary Address, Phone, and Email info for each Role.

Page Used to Run the Basics AE Process

Page Name	Object Name	Navigation	Usage
Application Engine Request	AE_REQUEST	PeopleTools, Application Engine, Request AE, Application Engine Request	Submit the Basics AE (BO_BASICS) process.

Disabling Unnecessary Roles, Relationships, and Contact Methods

The Basics AE process dynamically reads all enabled roles, relationships, and mappings. To tailor the process for your particular requirements and improve process performance, you can disable or remove the following information:

- Basic data for roles.

You are not required to implement all delivered roles for an installation, or copy all implemented roles to basic data. To disable a role for basic data, deselect the Enabled for Basic Data option for the role on the Role Type page.

The roles that are enabled for basic data as delivered are:

- Company
- Site
- Worker
- Contact
- Individual Consumer
- Partner

- Basic data for relationships.

You can also disable relationships for basic data if they are not used, for example, if an enterprise does not sell through the partner channel. Disable a relationship by deselecting the Enabled for Basic Data on the Relationship Type page. The relationships that are enabled for basic data as delivered are:

- Primary Contact / Company
- Contact / Company

- Primary Contact / Partner
- Contact / Partner
- Remove basic data mappings for contact method purposes that are not needed. You can add or clone these mappings if they are needed in the future.

The basic data mappings are delivered with multiple contact method purpose types associated with each role and relationship. These are the contact method purpose types that are mapped as delivered, and they vary by role:

- Phone - Business
- Phone - FAX
- Phone - Home
- Email - Business
- Email - Home
- Address - Business
- Address - Home

To remove a contact method purpose from a role or relationship, display the role or relationship on the Basic Data Mappings page, scroll to the contact method purpose row, and use the Delete Row button.

Optimizing the Database for Performance

The DBA might perform some or all of the following actions:

Stripe the Disks on Which Data Resides

Striping is the process of dividing data into blocks and locating the blocks on different physical disks, which enables parallel database processing and speeds up the run.

Run SQL to Detect Problematic Data

The following data conditions can cause the Basics AE program to run inefficiently and can be detected and addressed prior to running the process:

- Duplicate primary contact methods.

Use this sample SQL to detect duplicates in the *Phone* table. You must run the same SQL for the *Address* and *Email* tables. To do so, replace each occurrence of the table name *PS_BO_SRCH_PHN* with *PS_BO_SRCH_ADD* (for address) and *PS_BO_SRCH_EML* (for email) before running.

```
SELECT BO_ID, ROLE_TYPE_ID, BO_REL_ID, COUNT(*) FROM PS_BO_SRCH_PHN BO_CM_VW WHERE⇒
BO_CM_VW.ROLE_TYPE_ID IN (2, 3, 4, 8, 9, 11) AND BO_CM_VW.BO_CM_START_DT <= { fn⇒
CURDATE() } AND BO_CM_VW.BO_CM_END_DT > { fn CURDATE() } AND BO_CM_VW.CM_USE⇒
START_DT <= { fn CURDATE() } AND BO_CM_VW.CM_USE_END_DT > { fn CURDATE() } AND⇒
BO_CM_VW.PRIMARY_IND = 'Y' AND BO_CM_VW.PROFILE_CM_SEQ = (SELECT MAX(G2.PROFILE⇒
CM_SEQ) FROM PS_BO_SRCH_PHN G2 WHERE G2.BO_ID = BO_CM_VW.BO_ID AND G2.BO_CM⇒
START_DT = BO_CM_VW.BO_CM_START_DT AND G2.CM_USE_START_DT = BO_CM_VW.CM_USE⇒
DT AND G2.CM_USE_ID = BO_CM_VW.CM_USE_ID AND G2.ROLE_TYPE_ID = BO_CM_VW.ROLE⇒
TYPE_ID AND G2.BO_REL_ID = BO_CM_VW.BO_REL_ID AND G2.BO_REL_POSITION = BO_CM⇒
VW.BO_REL_POSITION) GROUP BY BO_ID, ROLE_TYPE_ID, BO_REL_ID HAVING COUNT(*) > 1
```

- Duplicate BO_ID in the Person table.

Run this SQL to detect duplicates in the Person table.

```
SELECT BO_ID, COUNT(*) FROM PS_RD_PERSON GROUP BY BO_ID HAVING COUNT(*) > 1
```

Gather Runtime Statistics

The Basics AE process step *CDMXSTAT* gathers and updates runtime statistics that are used by the relational database engine to optimize queries and find free space. This provides information to the engine about the distribution of data and improves the chances of index usage. It is recommended after large numbers of rows are inserted, tables are reorganized or when indexes are added or removed.

The DBA can disable this step (by making it *Inactive* in Application Designer) prior to a run if the statistics are already updated.

Drop and Rebuild Indexes

Drop table indexes and recreate them manually after the Basics AE process runs successfully. This is especially helpful on *DB2UNIX* or *DB2* platforms. You can drop the indexes manually or enable the Basics AE process step *CDMXDROP* to drop indexes

This is the list of indexes to drop and recreate:

- PS0BO_BASIC_IND
- PS1BO_BASIC_IND
- PSABO_BASIC_IND
- PSBBO_BASIC_IND
- PSCBO_BASIC_IND
- PSDBO_BASIC_IND
- PSEBO_BASIC_IND
- PS0BO_BASIC_TMP1
- PS1BO_BASIC_TMP1
- PS0BO_BASIC_TMP2
- PS1BO_BASIC_TMP2
- PSABO_BASIC_ORG_TMP2
- PSABO_BASIC_ORG
- PSBBO_BASIC_ORG
- PSCBO_BASIC_ORG

Inactivate Scheduled Jobs that Can Conflict with the Basics Process

The jobs *CM_FLTM* (for 8.9 and prior releases) and *CM_MAINT* (for release 9) are regularly scheduled to synchronize the normalized BORM tables to the flattened contact method tables. This improves access to contact methods for online processing, but can cause performance issues when run concurrently with the Basics AE.

To inactivate these jobs and any others that might cause data conflicts, use the PeopleTools Schedule JobSet Definitions page located under PeopleTools, Process Scheduler. Search for the job name and select *Inactive* in the Status field. Save the job definition.

When the Basics process ends, reactivate this job.

Submitting the Basics AE Process

To submit the Basics AE process, access the Application Engine Request page and add a new run control for the *BO_BASICS* program.

See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Engine*

APPENDIX A

Business Object Delivered Web Services

This appendix discusses the Customer and Translate Field web services, and provides guidelines on how to view message elements.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Working with Business Processes and Web Services,” Understanding Web Services

Customer

Oracle’s PeopleSoft Enterprise CRM delivers these service operations for the Customer (RB_CUSTOMER) web service:

- Get Customer.

This operation takes a BO ID and returns information of the corresponding customer.

- Search Contact.

This operation takes search criteria for company contacts or consumers, and returns the information of business objects that satisfy the search criteria.

- Search Customer.

This operation takes search criteria for companies, consumers, sites or partners, and returns information of business objects that satisfy the search criteria.

- Search Worker.

This operation takes search criteria for workers and returns the information of workers that satisfy the search criteria.

This table provides the technical names, operation type, and messages names of the service operations that are related to the Customer web services:

Service Operation	Operation Type	Request Message	Response Message
Get Customer (RB_CUSTOMER_GET_CUSTOMER)	Synchronous	RB_CUSTOMER_GET_CUST_REQ	RB_CUSTOMER_GET_CUST_RES
Search Contact (RB_CUSTOMER_SEARCH_CNCT)	Synchronous	RB_CUSTOMER_SEARCH_CNCT_REQ	RB_CUSTOMER_SEARCH_CNCT_RES

Service Operation	Operation Type	Request Message	Response Message
Search Customer (RB_CUSTOMER_SEARCH_CUST)	Synchronous	RB_CUSTOMER_SEARCH_CUST_REQ	RB_CUSTOMER_SEARCH_CUST_RES
Search Worker (RB_CUSTOMER_SEARCH_WRKR)	Synchronous	RB_CUSTOMER_SEARCH_WRKR_REQ	RB_CUSTOMER_SEARCH_WRKR_RES

Translate Field

Oracle's PeopleSoft Enterprise CRM delivers the Get Translate Codes service operation for the Translate Field (RB_TRANSLATEFIELD) web service. This operation takes the name of a translate field and returns a list of translate codes for that field.

This table provides the technical names, operation type, and messages names of the service operation that is related to the Translate Field web services:

Service Operation	Operation Type	Request Message	Response Message
Get Translate Codes (RB_TRANSLATEFIELD_GET)	Synchronous	RB_TRANSLATEFIELD_GET_REQ	RB_TRANSLATEFIELD_GET_RES

Viewing Message Elements

You can view the elements and fields that are included in each service operation message through PeopleTools.

To view a list of field names and aliases for a particular message:

- Select PeopleTools, Integration Broker, Integration Setup, Messages.
- Enter the name of the message you want to view in the Message Name field and click Search.
- The Message Definition page appears. Click the message name link under the Parts grid.
- Click the plus sign next to the table name at the bottom of the page to view the fields and aliases associated with the message.

Glossary of PeopleSoft Enterprise Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Enterprise Human Resources, PeopleSoft Enterprise Benefits

	Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	<p>In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.</p>
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft Enterprise General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met.

For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business process	A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i> .
business task	The name of the specific function depicted in one of the business processes.
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.

compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost-plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and

credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.
delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
directory information tree	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i> .
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.
event propagation process	In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing	In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
group	In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to

	run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects.
incentive rule	In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.
keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.
KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a

common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load	In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the <i>SQLExec</i> function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single

	transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.
PeopleCode event	See <i>event</i> .
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates

a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product	A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.
product line	The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log	In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	<p>In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.</p> <p>In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.</p>
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
speed key	See <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.

system function	In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	<p>The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).</p> <p>When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).</p>
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
third party	A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft Enterprise General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Enterprise Projects.

trace usage	In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also <i>inquiry access</i> .
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exemption	Abbreviation for <i>value-added tax exemption</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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