
PeopleSoft Enterprise CRM 9 Mobile Applications PeopleBook

August 2006

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About This PeopleBook

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

This preface discusses:

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

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

PeopleSoft Enterprise Application Prerequisites

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

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

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

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

Application Fundamentals

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

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

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

Documentation Updates and Printed Documentation

This section discusses how to:

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

Obtaining Documentation Updates

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

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

See Also

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

Downloading and Ordering Printed Documentation

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

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

Downloading PDF Files

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

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

Ordering Printed, Bound Volumes

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

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

Additional Resources

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

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft Enterprise or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

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

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

Common Elements Used in PeopleBooks

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

Once, Always, and Don't Run	<p>Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.</p> <p>Select Always to run the request every time the batch process runs.</p> <p>Select Don't Run to ignore the request when the batch process runs.</p>
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	<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	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

Oracle's PeopleSoft Enterprise CRM Mobile Applications Preface

This preface discusses:

- PeopleSoft enterprise products.
- Additional resources.
- PeopleSoft Enterprise CRM application fundamentals.
- PeopleSoft Enterprise CRM automation and configuration tools.
- PeopleSoft Enterprise CRM services foundation.
- PeopleSoft Enterprise CRM Sales.
- PeopleSoft Enterprise CRM Integrated FieldService.
- PeopleSoft Enterprise CRM Strategic Account Planning.
- PeopleSoft Enterprise CRM Order Capture applications.
- PeopleTools documentation.

Note. All information found in this PeopleBook is applicable to PeopleSoft Enterprise CRM (Customer Relationship Management) mobile applications.

PeopleSoft Enterprise Products

This PeopleBook refers to these PeopleSoft Enterprise CRM products:

- Oracle's PeopleSoft Enterprise CRM Mobile Account Planning.
- Oracle's PeopleSoft Enterprise CRM Mobile FieldService.
- Oracle's PeopleSoft Enterprise CRM Mobile Order Capture.
- Oracle's PeopleSoft Enterprise CRM Mobile Sales.

Additional Resources

The following documentation resources are essential to the successful implementation of PeopleSoft Enterprise Mobile Sales for BlackBerry:

Resource	Navigation
PeopleSoft Wireless WorkSpace Console & Server Installation Guide	This document is named WorkSpace - Installation Guide.pdf and is available in the application CD.
Administrator guide for the third-party Wireless WorkSpace server	This guide is in the form of an online help that is available after the server installation completes.

Resource	Navigation
PeopleSoft Enterprise Mobile Sales for BlackBerry User Guide	This document is named PeopleSoft Sales for BlackBerry - User Guide.pdf and is available in the application CD.
PeopleSoft Enterprise Sales 9 PeopleBook	This PeopleBook is in the documentation CD for PeopleSoft CRM version 9.

PeopleSoft Enterprise CRM Application Fundamentals

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

The *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft Enterprise CRM product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire PeopleSoft Enterprise CRM system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

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

PeopleSoft Enterprise CRM Automation and Configuration Tools

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

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

- Correspondence management.

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

- Automation tools.

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

- Configuration tools.

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

- Knowledge management.

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

- Business process management.

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

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

See Also

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

PeopleSoft Enterprise CRM Services Foundation

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

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

- Entitlement management.

This part discusses how solution management enables users to establish a set of predefined solutions that call center agents and field service technicians use to resolve customer problems.

- Transaction Billing Processor Integration.

This part discusses how PeopleSoft Transaction Billing Processor enables PeopleSoft Enterprise FieldService, PeopleSoft Enterprise Support, and PeopleSoft Enterprise Order Capture to integrate with PeopleSoft Billing and PeopleSoft General Ledger through the use of the PeopleSoft Contracts architecture. Also covered is how this integration enables PeopleSoft Enterprise CRM users to bill and book revenue for recurring, one-time, and on demand service.

- Environmental Systems.

This part covers the Research Institute (ESRI) integration. The integration with ESRI, a mapping software, enables users to view the location of reported cases and the location of field service activities through the Map Dashboard.

See Also

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

PeopleSoft Enterprise CRM Sales

PeopleSoft Enterprise Sales enables you to:

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

See Also

PeopleSoft Enterprise Sales 9 PeopleBook, “Oracle’s PeopleSoft Enterprise CRM Sales Preface”

PeopleSoft Enterprise CRM Integrated FieldService

PeopleSoft Integrated FieldService ensures total life cycle management of service requests for customers and technicians. PeopleSoft Integrated FieldService is a flexible service order and dispatch management solution that provides complete management of agreements, parts, time, and expenses. It provides functionality to systematically manage preventive maintenance programs, generate reports, and automatically schedule preventive maintenance service orders.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “PeopleSoft Integrated FieldService Preface”

PeopleSoft Enterprise CRM Strategic Account Planning

PeopleSoft Enterprise Strategic Account Planning provides tools that enable you to leverage customer value data to drive strategic planning and budgeting for the entire customer life cycle—marketing, sales, and service. With this application you can:

- Evaluate customer value and needs.
- Develop sales and support strategies to maximize customer value.
- Allocate resources based on customer value.
- Identify new opportunities to increase customer value.
- Collaborate with account team members and partners.
- Measure and improve account performance.

See Also

PeopleSoft Enterprise Strategic Account Planning 9 PeopleBook, “Oracle’s PeopleSoft Enterprise CRM Strategic Account Planning Preface”

PeopleSoft Enterprise CRM Order Capture Applications

PeopleSoft CRM consists of two applications which contribute to the interactive selling experience:

- PeopleSoft Enterprise Order Capture.

This internally facing application is a robust CRM order management tool that enables customer sales representatives (CSRs) or sales representatives to manage orders and quotes.

- PeopleSoft Enterprise Order Capture Self-Service.

This externally facing application enables web users—such as brokers, business customers, and consumer customers—to easily create and manage their own orders and quotes.

See Also

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, “PeopleSoft Enterprise CRM Order Capture Applications Preface”

PeopleTools Documentation

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

PART 1

Getting Started with PeopleSoft Enterprise CRM Mobile Applications

Chapter 1

Getting Started with PeopleSoft Enterprise CRM Mobile Applications

CHAPTER 1

Getting Started with PeopleSoft Enterprise CRM Mobile Applications

This chapter provides overviews of Oracle's PeopleSoft Enterprise Mobile Sales for BlackBerry and Oracle's PeopleSoft Enterprise Customer Relationship Management (CRM) mobile applications and discusses:

- PeopleSoft Enterprise Mobile Sales for BlackBerry integrations.
- PeopleSoft Enterprise CRM mobile applications business processes.
- PeopleSoft Enterprise CRM mobile applications implementation.

Note. This book focuses on the setup and usage of mobile functionality and does not discuss core PeopleSoft Enterprise Customer Relationship Management setup or usage. Review the references that are provided in each chapter before beginning the implementation.

PeopleSoft Enterprise Mobile Sales for BlackBerry Overview

PeopleSoft Enterprise Mobile Sales for BlackBerry is a lightweight mobile product that extends the sales application functionality on a BlackBerry device. It allows sales managers and representatives to access and manage sales information on the road in real time. Sales personnel can add and edit leads, opportunities, contacts, and companies; work on tasks; view call reports; and manage their accounts on the BlackBerry device. Changes that they make on the device are synchronized to the PeopleSoft system automatically. The update is near instantaneous if users are in the coverage area of the wireless network.

PeopleSoft Enterprise CRM Mobile Applications Overview

PeopleSoft Enterprise CRM offers mobile solutions for these core applications:

- PeopleSoft Enterprise Mobile Sales.
- PeopleSoft Enterprise Mobile Order Capture.
- PeopleSoft Enterprise Mobile Account Planning.
- PeopleSoft Enterprise Mobile FieldService.

Through these applications, you can give your mobile sales representatives access to the data and applications they need whenever and wherever they need them, enable your sales agents to capture orders at the point of need by immediately updating sales orders with back-office systems, and provide your service technicians with the critical information they need to be more productive and deliver the best customer service possible while in the field.

PeopleSoft Enterprise Mobile Sales for BlackBerry Integrations

PeopleSoft Mobile Sales for BlackBerry integrates with a third-party application software platform to provide near real-time enterprise data access to mobile sales users through the BlackBerry. Component interfaces (CIs) facilitate data synchronization between the PeopleSoft database and mobile BlackBerry devices. We discuss integration considerations in the implementation chapters in this document.

PeopleSoft CRM Mobile Business Processes

PeopleSoft Enterprise mobile applications provide these business processes:

- Mobile order capture.
- Mobile sales.
- Mobile account planning.
- Mobile field service.

We discuss these business processes in the business process chapters in this PeopleBook.

PeopleSoft Enterprise CRM Mobile Applications Implementation

PeopleSoft Enterprise mobile applications do not require table-loading implementation steps.

PeopleSoft Mobile Sales for BlackBerry Implementation

PeopleSoft Mobile Sales for BlackBerry runs on top of the PeopleSoft Sales application. The majority of setup tasks are performed on the PeopleSoft Wireless WorkSpace Console. A complete list of documentation and resources can be found in the PeopleSoft Enterprise Mobile Sales for BlackBerry chapter.

See [Part 2, “PeopleSoft Enterprise Mobile Sales for BlackBerry,” page 5](#).

Note. PeopleSoft Setup Manager does not apply to any mobile applications in PeopleSoft Enterprise CRM.

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

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

PART 2

PeopleSoft Enterprise Mobile Sales for BlackBerry

Chapter 2

Understanding PeopleSoft Enterprise Mobile Sales for BlackBerry

Chapter 3

Working with Installation, Configuration, and Administration

Chapter 4

Understanding PeopleSoft Data on Your BlackBerry Device

CHAPTER 2

Understanding PeopleSoft Enterprise Mobile Sales for BlackBerry

This chapter discusses the architecture of PeopleSoft Enterprise Customer Relationship Management (CRM) Mobile Sales for BlackBerry.

Architecture of PeopleSoft Enterprise Mobile Sales for BlackBerry

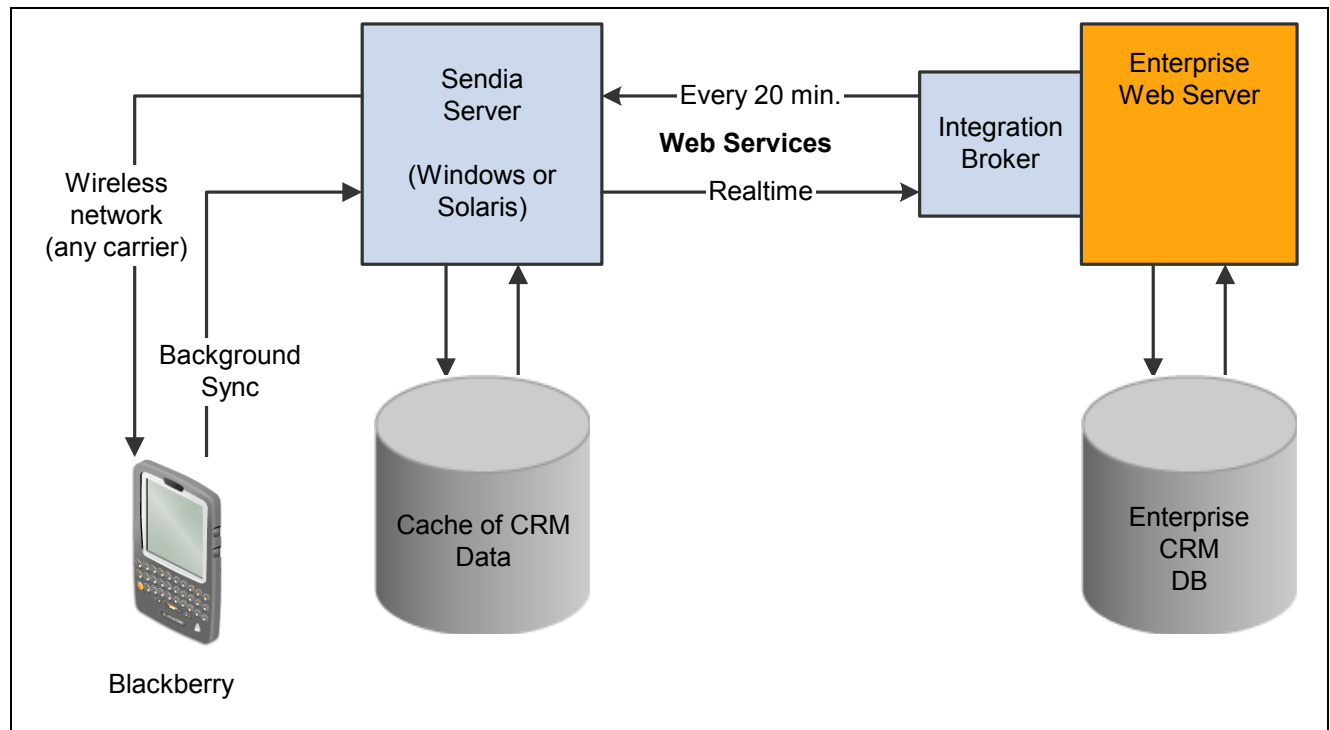
PeopleSoft Enterprise CRM integrates with the third-party, wireless application platform to provide near real-time enterprise data access to mobile sales users through the handheld BlackBerry device. The integration framework leverages Sendia Enterprise Application Integration technologies and the PeopleSoft Pure Internet Architecture using web services and Simple Object Access Protocol to CI (SOAPTOCI) transactions.

After the application installation and configuration is complete, data synchronization can start. The Sendia Wireless WorkSpace server (referred to as the Wireless WorkSpace server throughout this document) accesses PeopleSoft Enterprise data using web services that are driven by component interfaces (CIs). Synchronous SOAP messages are used to shuttle data between the CRM system, Wireless WorkSpace server, and BlackBerry devices. Synchronizations are performed in the background whenever users are within the network coverage. If users are not within coverage, the changes are queued and then synchronized when users are back in coverage.

Should synchronization fail, the Wireless WorkSpace server captures the errors in a log. BlackBerry users normally do not receive notifications about synchronization failure.

User edits on the BlackBerry devices are sent to the Wireless WorkSpace server automatically through background synchronization, while data changes from the PeopleSoft system are synchronized to the Wireless WorkSpace server at a configured time interval. During synchronization, the Wireless WorkSpace server makes a request to the PeopleSoft CRM system to pull all the relevant entities to all the BlackBerry devices. Users obtain data based on the dataset rules that are defined in the PeopleSoft CRM system. The end result of this timed synchronization is that all users get a set of data that is pertinent to their job functions. Every set of downloaded data is likely to be unique based on the user role and the dataset rules that are in place for each of the users. If users are not in the coverage area, the Wireless WorkSpace server puts the updates in queue and sends them to the devices as soon as users are within coverage again.

The Wireless WorkSpace server manages BlackBerry devices and provides data caching in the synchronization process to improve performance. This diagram illustrates the integration between PeopleSoft CRM and the third-party wireless application platform:



Integration between PeopleSoft CRM and the third-party wireless application platform

The Wireless Workspace server polls the PeopleSoft CRM server at regular intervals that you specify when you create the users on the Wireless Workspace server. Exercising caution when you determine the correct time interval for synchronization is critically important: if the time interval is too low, you will create a large load on the CRM server; if it is too high, users will not get updates in a reasonable time frame.

CHAPTER 3

Working with Installation, Configuration, and Administration

This chapter provides overviews of installation and configuration and the integration between Oracle's PeopleSoft Enterprise CRM and the third-party wireless solution, and discusses how to administer Oracle's PeopleSoft Enterprise Mobile Sales for BlackBerry.

Understanding Installation and Configuration

PeopleSoft Enterprise Mobile Sales for BlackBerry runs on the PeopleSoft Enterprise Sales application.

Installation Tasks

The complete installation of this integrated product can be divided into these high-level tasks:

1. Install PeopleSoft Enterprise Mobile Sales for BlackBerry from the PeopleSoft product CD.
Refer to the installation document for more information.
2. Install Wireless WorkSpace solutions (server and management console) from the application CD.
Refer to the PeopleSoft Wireless WorkSpace Console & Server Installation Guide for more information.

Configuration on Wireless WorkSpace Console

After the installation is completed, you can use the web-based management console to perform setup tasks and specify configuration settings on the server. For example, you can:

- Add, delete, and manage BlackBerry device users.
- Add, delete, and manage profiles to which users are assigned.
- Select fields for each entity (and the order in which they appear) to appear on the device and update field labels.

Users of the same profile share the same set of entity and field display on their devices.

- Set up the time interval for data synchronization between the CRM server and BlackBerry devices.
- Send data to users' devices.

This is similar to performing a full synchronization.

Refer to the administrator guide (online help) for more details on the types of information and setup that can be managed through the PeopleSoft Wireless WorkSpace Console.

Understanding Integration Between PeopleSoft CRM and Third-Party Wireless Solution

PeopleSoft CRM provides real-time synchronous access of data and business rules to the Wireless WorkSpace server through CIs. These CIs are exposed as web services, which allow the Wireless WorkSpace server to access methods and properties that are defined in them and thus relay sales information that is received from or intended for BlackBerry devices within the network.

To use these web services, the Wireless WorkSpace server consumes, composes, and transmits Simple Object Access Protocol (SOAP) messages using Web Services Description Language (WSDL) documents that are generated for each CI. In Integration Broker, a node is defined for this integration and the Simple Object Access Protocol to CI (SOAPTOCI) message is activated to allow synchronous transactions. You can modify the authentication option in this node as needed.

See Also

Enterprise PeopleTools PeopleBook: Integration Broker

Delivered Component Interfaces

PeopleSoft CRM includes CIs to provide efficient data update and distribution for various sales entities for both the CRM system and BlackBerry devices. They can be grouped into these categories:

- List component interfaces.

These are responsible for pushing *all* the relevant entity information to the Wireless WorkSpace server. They know which data records have been changed or added since the last synchronization. The shape of these CIs contains all fields that are exposed on BlackBerry devices. This design provides optimal performance because it reduces unnecessary handshaking that occurs during each synchronization transaction between the PeopleSoft and third-party platforms.

- Update/Create component interfaces.

These CIs are responsible for synchronizing data records, which have been changed, back to the CRM system, particularly atomic transactions that involve the update and creation of data records from the BlackBerry handheld. These CIs expose only essential fields that are shown and used in BlackBerry devices.

- Metadata component interface.

This CI exposes metadata attributes, such as the shape of the CIs, their properties, default values, and data types. It allows the Wireless WorkSpace server to collect information about any given CI and its properties, and hence be able to react to certain code changes that may have been performed by a customer, for example, label changes.

- Lookup prompt component interface.

Application data, for example, XLAT values (translate values), prompt tables and prompt values, are exposed through this CI.

- Sales user preferences component interface.

This CI includes the user's global preferences, such as the sales business unit, person ID, and default currency code.

Component Interface Name	Type	Description
RIM_CDM_LIST Combined Contact and Company List Request	List	Returns a collection of contact, call report, and company information. Contacts and companies being sent down to the device are driven by the dataset rules that are defined for each BlackBerry user.
RIM_LE_OPP_LIST Combined Lead and Opportunity List Request	List	Returns a collection of lead and opportunity information. Leads and opportunities being sent down to the device are driven by the dataset rules that are defined for each BlackBerry user.
RIM_TASK_LIST Task List Request	List	Returns a collection of task information. Contacts and companies being sent down to the device are driven by the dataset rules that are defined for each BlackBerry user.
RIM_PERSON Contact Update/Create Request	Update/Create	Used to manage contact information. It enables the user to create or update contact information on the device and send it back to the server.
RIM_COMPANY Company Update/Create Request	Update/Create	Used to manage company information. It enables the user to create or update company information on the device and send it back to the server.
RIM_LEAD Lead Update/Create Request	Update/Create	Used to manage lead information. It enables the user to create or update lead information on the device and send it back to the server.
RIM_OPPORTUNITY Opportunity Update/Create Request	Update/Create	Used to manage opportunity information. It enables the user to create or update opportunity information on the device and send it back to the server.
RIM_TASK Task Update/Create Request	Update/Create	Used to manage task information. It enables the user to create or update task information on the device and send it back to the server.
RIM_CALL_REPORT Call Report Update/Create Request	Update/Create	Used to manage call report information. It enables the user to create or update call report information on the device and send it back to the server.
RIM_METADATA_CI Metadata Request	Metadata	Contains metadata information. This CI is used by the PeopleSoft Wireless WorkSpace Console to determine metadata attributes of a CI.
RIM_SALES_LOOKUP Lookup/Pick List/Translate Values Request	Lookup Prompt	Contains system data, such as task types, state codes, country codes, and fallout reason codes for opportunities.
RIM_OPR_GBL_PREF Global Preference Request	Sales User Preferences	Contains the BlackBerry user's global preferences, such as the user's sales business unit, person ID, and default currency code.

Customization Considerations

You can take advantage of the placeholder fields to support synchronization of additional data with minimum effort.

Placeholder Fields

PeopleSoft Enterprise Mobile Sales for BlackBerry provides 10 blank fields, each 70 characters long, at level 0 of each entity. As a customization effort, you can use them for displaying custom fields as well as delivered fields that were not exposed in the List CIs. For example, you can use a blank field to add the Campaign Name field to the Lead entity to suit your business needs.

These blank fields are delivered as read-only fields.

Here are the high level steps for enabling the use of placeholder fields in the application:

1. Open the target List CI in application designer.
2. Find the record of the placeholder field that you want to use, and add the desired label for that field.
3. Define the placeholder field label (in the Record Field label ID field) on the Record Field Properties dialog box.
4. Add RowInit code to populate the placeholder field.

You can modify the label of fields that are exposed to PeopleSoft Enterprise Mobile Sales for BlackBerry in two ways, using the PeopleSoft Application Designer or the PeopleSoft Wireless Workspace Console. Label change you made on these fields in the PeopleSoft Application Designer takes effect on profiles that are created after the change, and does not impact existing profiles.

Data Distribution and Security

BlackBerry devices, compared to workstations, are limited in processing power and storage capacity. To enable efficient and secured data distribution from the CRM server to all BlackBerry devices without causing potential system overload, PeopleSoft CRM performs role-based data filtering and data distribution for each device using datasets. Each CI is associated with a dataset to determine the set of data that is passed to BlackBerry devices.

Datasets enable you to limit the amount of data and decide which set of data to download to each BlackBerry device by associating dataset rules with dataset roles. Dataset rules specify data subsets in the CRM system. Dataset roles contain collections of dataset rules, which determine the final set of data that users of these roles get in their BlackBerry devices when data synchronization occurs. The role-based data distribution mechanism provides the following benefits:

- **Data Security.**

Sales lead information is often sensitive and is not shared by everyone in the organization. Dataset rules are the perfect tool to implement restrictive data access. For example, if you want lead owners to be able to see only the lead information, you can set up a dataset rule that passes leads to the BlackBerry device only if its user is the owner of the lead. Other users will not see it even if they have the same role.

- **Data Relevance.**

BlackBerry devices are limited in processing power and storage capacity; therefore, dataset rules need to be carefully designed so that users can access all the data that they need to be successful while not reaching the size limit. Specifically, PeopleSoft Enterprise Mobile Sales for BlackBerry limits the maximum number of data instances to download to the devices as part of the setup for mobile data distribution setup. As a result, users are more likely to get a set of data that is useful and relevant to their job functions because they cannot afford to store unwanted data on their devices.

For more information about mobile data distribution, refer to the chapter on using datasets in the *PeopleSoft Enterprise Components for CRM 9 PeopleBook*.

Important! While you can modify the number of maximum entity data records (the limit by count value) to download for each entity, note that when you increase the number of downloaded records for one entity, you need to reduce this number for other entities to keep the total number of downloaded records to approximately 200 (the recommended number that resulted from our testing environment). Refer to the Local Data Storage Limitation section in this document for more information.

In addition, be aware of the amount of data that is being sent to the device for entities such as companies and contacts. Each component interface has a limit by count value that is defined under Enterprise Components, Component Configurations, Mobile, Mobile Data Distribution. Data integrity issues to other objects can occur when these limits are breached.

For further discussion on mobile data distribution and datasets, refer to the datasets chapter that is available in the *PeopleSoft Enterprise Components for CRM 9 PeopleBook*.

Delivered Dataset Rules

PeopleSoft Enterprise Mobile Sales for BlackBerry delivers five datasets, each of which contains a list of dataset rules that you can associate with dataset roles to delineate the final set of data to be downloaded for users of these roles.

To access datasets that are delivered for this application, navigate to Enterprise Components, Component Configurations, Datasets, Dataset Rules. The name of these datasets starts with the prefix *RIM*.

See *PeopleSoft Enterprise Components for CRM 9 PeopleBook*, “Using Datasets”

Delivered Dataset Roles

PeopleSoft Enterprise Mobile Sales for BlackBerry delivers two dataset roles: RIM Sales Rep and RIM Sales Manager. Each BlackBerry device user must be assigned to one of the two roles in the PeopleSoft system before synchronization begins.

Note. To create or remove administrator privileges for specific roles, you must manually make changes to permission lists for the role or create new roles.

See *PeopleSoft Enterprise Components for CRM 9 PeopleBook*, “Using Datasets”

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

Bulk User Export

PeopleSoft Wireless Workspace Console provides an option to invite new users in bulk to register in the console and download the PeopleSoft Enterprise Mobile Sales for BlackBerry application on their devices. It reads the user information that is stored in a .csv (comma separated values) file and sends invitation email to users accordingly.

In PeopleSoft CRM, you can generate the .csv file that contains information of all sales users in the system. When you make a request to export users on the .csv file, an application engine program (RIM_USR_GEN) runs and it picks up sales users who are associated with any of the dataset roles that are specified on the page and have email addresses on their worker records. The .csv file includes user information (first name, last name, and email address) that is required by the console to send invitations.

The CRM system keeps records of users who are exported successfully and those who aren't in stage tables. These two lists are available for review on the run control page. For users who fail to be exported (for example, missing email addresses), you can fix the issue on their worker records and export them again using a new run control ID. For users who are exported, their person IDs are logged in the stage table so that they will not be included in future .csv file instances. The logging of exported users allows for efficient incremental user export, which ensures that new sales users who need the mobile application have access to it, and prevents users from receiving duplicate invitations.

The .csv file (RIM_USERS.CSV) is posted on the FTP server at a location that is specified in the RIM_USR_GEN_FTP entry on the URL Maintenance page.

Refer to the chapter on using PeopleTools utilities for more information about URL maintenance.

See Also

Enterprise PeopleTools PeopleBook: System and Server Administration

Administering PeopleSoft Enterprise Mobile Sales for BlackBerry

This section discusses how to:

- Export user information.
- Specify setup options.
- View synchronization statuses.

System administrators are responsible for performing these tasks.

Note. This section covers two administrative tasks to be performed in the PeopleSoft system. Refer to the documentation on the Wireless WorkSpace Console for more discussion of product administration.

Pages Used to Administer PeopleSoft Enterprise Mobile Sales for BlackBerry

Page Name	Object Name	Navigation	Usage
Export User Information	RIM_USR_GEN_PG	Set Up CRM, Install, BlackBerry, Export User Information, Export User Information	Export user information in .csv files, which are used in the PeopleSoft Wireless WorkSpace Console for sending bulk email invitations.
BlackBerry Setup Options	RIM_SETUP_OPTNS	Set Up CRM, Install, BlackBerry, Setup Options, BlackBerry Setup Options	Specify setup options that are used by the sales application for BlackBerry devices.
Synchronization Status	RIM_SYNC_STATUS	Set Up CRM, Install, BlackBerry, Synchronization Status, Synchronization Status	View synchronization activities for users.

Exporting User Information

Access the Export User Information page.

Export User Information

▼ **Users to be Exported**

Select Role(s) for users to be exported. [Customize](#) | [Find](#) | [View All](#) | First ◀ 1 of 1 ▶ Last

Role Name
RIM Sales Rep

Run Control ID: PSFT_SRV_100 [Report Manager](#) [Process Monitor](#) [Run](#)

▼ **Users Exported**

Successful Export [Customize](#) | [Find](#) | [View All](#) | First ◀ 1-3 of 3 ▶ Last

First Name	Last Name	Email Address	Person ID
Terry	Murphy	tmurphy@gbj_psft.com	300019
Burt	Lee	blee@gbj_psft.com	300023
Frank	Peterson	aklcrm@yahoo.com	599

Failed Export (Blank E-mail Address) [Customize](#) | [Find](#) | [View All](#) | First ◀ 1 of 1 ▶ Last

First Name	Last Name	Email Address	Person ID
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[Clear Stage Tables](#)

Export User Information page

Select Role(s) for users to be exported

Specify roles for users whom you want to export to the .csv files. Typically, select *RIM Sales Rep* and *RIM Sales Manager*.

Run	<p>Click to start the AE process to generate the .csv file. The button is disabled after the process has begun.</p> <p>The generated .csv file is posted on the FTP server at a location that is specified in the RIM_USR_GEN_FTP entry on the URL Maintenance page. Administrators use this file to import users into the PeopleSoft Wireless WorkSpace server. Refer to the online help of the console for information about user import.</p>
Successful Export	Display the list of users who have been successfully exported to the .csv file.
Failed Export (Blank E-mail Address)	<hr/> Important! To ensure that users can be exported successfully, each of them must have a valid primary email address specified on the Person component for the worker role. <hr/>
Clear Stage Tables	<p>Click to clear the contents of the stage tables for both successful and failed exports. This applies to all run control IDs.</p> <hr/> Important! Exercise caution before clicking this button because it deletes the history of users who were exported successfully in the past. The next generated .csv file will include all users in the system who have the specified roles regardless of whether they were exported already. <hr/>

Specifying Setup Options

Access the BlackBerry Setup Options page.

Blackberry Setup Options

Description

Purchasing Option

☒ **Bill To Customer**
☒ **Ship To Customer**
☒ **Sold To Customer**

Address Purpose Type Mailing
 Phone Purpose Type Business
 Email Purpose Type Business
 Dynamic Search Refresh

Level 1 Collection Options

	Object Type	Collection Count		
1	Company Notes	5	+	-
2	Call Report Notes	5	+	-
3	Lead Notes	5	+	-
4	Lead Quotes	5	+	-
5	Lead Products	5	+	-
6	Opportunity Quotes	5	+	-
7	Opportunity Notes	5	+	-
8	Opportunity Products	5	+	-
9	Contact Notes	5	+	-
10	Task Notes	5	+	-

BlackBerry Setup Options page

Use this page to specify setup data, such as purchasing options and default contact method types to be used in the application. Due to limited storage space in the mobile device, you can specify the maximum number of level 1 rows to be downloaded for the corresponding entity. For example, if the collection unit is set to 5 for contact notes, only five of them will be downloaded to the device for the contact entity based on the last maintained synchronization date and time.

Description

Enter the setup option description. PeopleSoft CRM delivers one setup option profile, BlackBerry Default Options, with the application.

Purchasing Option

Select the purchasing options that apply to customers. Options are Bill To Customer, Ship To Customer, and Sold To Customer. When you add a customer on the BlackBerry device, the customer will have the purchasing options that are selected here.

Address Purpose Type, Phone Purpose Type, and Email Purpose Type




Enter default contact method types to be used for addresses, phone numbers, and email addresses that are created on BlackBerry devices.

Dynamic Search Refresh

Enter the count on which the CRM server sends key values for dynamic search to the Wireless WorkSpace server depending on the lead and opportunity dataset rules. For example, if this field value is set to 3, the CRM server sends key values to the Wireless WorkSpace server on every third dynamic search request on leads and opportunities.

Viewing Synchronization Statuses

Access the Synchronization Status page.

Synchronization Status				
Name Burt Lee				
Customize Find View All 				
First  1-4 of 4  Last				
User ID	Object Type	Last Synchronization	Current Synchronization	
1 BLEE	Company, Contact and Call Rep	02/25/2005 2:52PM	02/25/2005 3:14PM	
2 BLEE	Lead and Opportunity	02/25/2005 2:53PM	02/25/2005 3:15PM	
3 BLEE	MetaData	02/09/2005 7:17PM	02/22/2005 4:56PM	
4 BLEE	Task	02/25/2005 2:53PM	02/25/2005 3:15PM	

Synchronization Status page

This page provides the synchronization information for each selected user. On each row, it captures the entities and type of information being synchronized, and when the last synchronization occurred. It is for informational purposes only.

CHAPTER 4

Understanding PeopleSoft Data on Your BlackBerry Device

This chapter discusses:

- PeopleSoft data on your BlackBerry device.
- Synchronization with native BlackBerry applications.
- Data validation.

PeopleSoft Data on Your BlackBerry Device

PeopleSoft Enterprise Mobile Sales for BlackBerry enables you to access data records of a number of entities on the BlackBerry device. Each data record includes a tear sheet, which displays a link for each of its related functional areas (entities). For example, a user can access from a lead record a list of contacts, products, and quotes that are associated with that lead. Based on user requirements, you can specify which related entities to display in the tear sheet using the PeopleSoft Wireless WorkSpace Console.

Here is a list of supported entities:

- Companies.

In addition to company information, access to data records that are related to companies are also available on the same screen, such as account teams (read-only), contacts, leads, opportunities, tasks, call reports, and notes.

- Accounts.

Accounts are companies that have associated account teams. In accounts, you can view relevant company details.

- Contacts.

In addition to contact information, access to data records that are related to contacts are also available on the same screen, such as companies, leads, opportunities, tasks, call reports, and notes.

- Leads.

In addition to lead information, access to data records that are related to leads are also available on the same screen, such as companies, contacts, tasks, products (read-only), quotes (read-only), sales teams (read-only), and notes.

- Opportunities.

In addition to opportunity information, you can access the same kind of related data records in opportunities as in leads.

- Tasks.

In addition to task information, access to data records that are related to tasks are also available on the same screen, such as contacts, notes, and assignees.

- Calendar entries.

For more information about how to work with PeopleSoft entities on the BlackBerry device:

See [Part 2, “PeopleSoft Enterprise Mobile Sales for BlackBerry,” page 5](#).

Local Data Storage - Limitation

Currently, the BlackBerry devices on the market have approximately 4 MB of space for PeopleSoft Enterprise Mobile Sales for BlackBerry, and that is assuming that nothing else but the operating system is loaded on the device. In the BlackBerry devices that are used in our testing environment, that roughly translates to storing a little over 200 entity data records (for example, leads, companies, and contacts). This number will vary depending on factors such as the BlackBerry device model, the number of applications that are installed on the device and how much space each of them takes, the number of emails and native tasks stored on the device, and so on.

To preserve space, PeopleSoft limits the amount of level 1 collection information to be downloaded to the BlackBerry device.

This table lists the default number of level 1 collection information to download to BlackBerry devices:

Level 1 Collection Information Description	Number to Data Record to Download
Contacts to a company	First five in the collection
Companies to a contact	First five in the collection
Notes for a contact	Last five (most recent) in the collection
Notes for a company	Last five (most recent) in the collection
Notes for a lead	Last five (most recent) in the collection
Notes for an opportunity	Last five (most recent) in the collection
Notes for a task	Last five (most recent) in the collection
Tasks for a lead	No defined limit
Tasks for an opportunity	No defined limit
Call reports for a contact	First five in the collection
Contacts for a call report	First five in the collection

Most of these values are configurable on the BlackBerry Setup Options page to suit your business needs.

Dynamic Search

PeopleSoft Enterprise Mobile Sales for BlackBerry keeps a subset of sales data in users' BlackBerry devices as a result of storage limitation. When users search on entities, some of the data records that are returned may not actually be available locally. If users select one of those entries and look at the details, they will be prompted whether they want to perform a dynamic search, which involves a trip to the server to collect the data. If yes, the device communicates to the Wireless WorkSpace server and provides a list of entities that can optionally be retrieved from the server and brought down to the device in real time.

Synchronization with Native BlackBerry Applications

You can set up PeopleSoft Enterprise Mobile Sales for BlackBerry to synchronize contacts, calendar, and tasks with the native BlackBerry applications through the PeopleSoft Wireless WorkSpace Console. When you enable this option, contacts, calendar, and tasks that are created and updated on PeopleSoft Enterprise Mobile Sales for BlackBerry are copied over to the native applications. When you create and update these data records on the native applications, they will be copied over to sales application on the handheld as well.

Note. Accessing My Calendar in PeopleSoft Enterprise Mobile Sales for BlackBerry brings you directly to the native calendar on the BlackBerry device.

Clear the option to disable this synchronization feature.

Field Mapping for Contacts

This table displays the field mapping of the Contact entity between PeopleSoft Enterprise Mobile Sales for BlackBerry and the native BlackBerry address book:

PeopleSoft Fields for Contacts	Native BlackBerry Fields for Contacts (Address Book)
Last Name	Last
First Name	First
Company	Company
Email	Email
Phone	Work
Title	Title
Gender	N/A. Information is discarded when downloaded to BlackBerry.
Date of birth	N/A. Information is discarded when downloaded to BlackBerry.
Address 1	Address1
Address 2	Address2
Address 3	N/A. Information is discarded when downloaded to BlackBerry.

PeopleSoft Fields for Contacts	Native BlackBerry Fields for Contacts (Address Book)
City	City
State	State/Prov
Postal	Zip/Postal Code
Note 1	Notes

Field Mapping for Tasks

These tables display the field mapping of the Task entity between PeopleSoft Enterprise Mobile Sales for BlackBerry and the native BlackBerry task application:

PeopleSoft Fields for Tasks (when Task Type is not Meeting)	Native BlackBerry for Tasks
Task subject	Task
Task type	N/A. Information is discarded when downloaded to BlackBerry.
Status	Status
Priority	Priority
Owner name	N/A. Information is discarded when downloaded to BlackBerry.
Start date	N/A. Information is discarded when downloaded to BlackBerry.
Start time	N/A. Information is discarded when downloaded to BlackBerry.
End date	Due
End time	N/A. Information is discarded when downloaded to BlackBerry.
Private	N/A. Information is discarded when downloaded to BlackBerry.
Location	N/A. Information is discarded when downloaded to BlackBerry.
Time zone	N/A. Information is discarded when downloaded to BlackBerry.
Note 1	Notes

PeopleSoft Fields for Tasks (when Task Type is Meeting)	Native BlackBerry for Tasks
Task subject	Subject
Task type	N/A. Information is discarded when downloaded to BlackBerry.
Status	N/A. Information is discarded when downloaded to BlackBerry.
Priority	N/A. Information is discarded when downloaded to BlackBerry.

PeopleSoft Fields for Tasks (when Task Type is Meeting)	Native BlackBerry for Tasks
Owner name	N/A. Information is discarded when downloaded to BlackBerry.
Start date	Start
Start time	N/A. Information is discarded when downloaded to BlackBerry.
End date	End
End time	N/A. Information is discarded when downloaded to BlackBerry.
Private	N/A. Information is discarded when downloaded to BlackBerry.
Location	Location
Time zone	Time zone
Note 1	Notes

Task Type Mapping

This table displays the task type mapping between PeopleSoft Enterprise Mobile Sales for BlackBerry and the native BlackBerry task application:

PeopleSoft Entity	Native BlackBerry Entity
Task — Appointment	Task
Task — To Do	Task
Task — Meeting In PeopleSoft CRM, calendar entries are tasks with the type of <i>Meeting</i> .	Calendar entry

Task Status Mapping

This table displays the task status mapping between PeopleSoft Enterprise Mobile Sales for BlackBerry and the native BlackBerry task application:

PeopleSoft Task Status	Native BlackBerry Task Status
Open	Not Started
Open	Waiting
In Progress	In Progress
Completed	Completed
Canceled	Deferred

Running PeopleSoft Enterprise Mobile Sales for BlackBerry and Infosync Applications

You cannot run PeopleSoft Enterprise Mobile Sales for BlackBerry and Infosync applications simultaneously for the same user. This setup works *only* if you disable the synchronization feature between PeopleSoft Enterprise Mobile Sales for BlackBerry and native BlackBerry applications. Otherwise, running both applications for the same user will cause massive and undesirable data duplication in the enterprise.

Data Validation

When you save a data record on the BlackBerry device, data validation rules of the native applications apply. Some, though very few, required fields are on native BlackBerry data records where data validation is enforced. For example, a name or company name is required to save a contact in the address book. When this contact is uploaded to the PeopleSoft system, the copy on the device will be locked, whereas the copy that is sent to the PeopleSoft system is validated again. If data validation fails at this point and the PeopleSoft system rejects the update, the contact will be deleted from PeopleSoft Enterprise Mobile Sales for BlackBerry. The Wireless WorkSpace server keeps a log of all the data synchronization errors for troubleshooting purposes.

Entity Data Records: Behavior and Considerations

This table lists the general behavior of entity data records in the synchronization process. This information can be helpful in troubleshooting issues in the application:

Entity	Behavior
General	The only language that PeopleSoft Enterprise Mobile Sales for BlackBerry supports for this release is English. Translations are not supported.
Lead and Opportunity	New leads and opportunities that are created on BlackBerry devices will assume the business unit that is associated with the user in the RSF_SUSER table.
	All active leads that are not closed, converted, or rejected are downloaded to users' devices based on delivered dataset rules.
	You can add new or modify existing rules in the CRM system.
	All open opportunities are downloaded to users' devices based on delivered dataset rules.
	You can add new or modify existing rules in the CRM system.
	Leads and opportunities provide read-only access to product, quote, and sales team information. Note also that recurring pricing is not displayed.
	Dataset rules: Users of the RIM Sales Manager role cannot modify lead information of sales representatives from the BlackBerry device. They cannot add or delete team members in leads.

Entity	Behavior
Company and Contact	PeopleSoft Enterprise Mobile Sales for BlackBerry does not support all the address fields that are supported in PeopleSoft Pure Internet Architecture. The available address fields in the application can manage addresses in the US or Canadian format. In the application, State is a drop-down list box and Country is set to be <i>Canada</i> or <i>USA</i> . In the native BlackBerry application, both of these fields are free-form fields.
	Each user requires a sales business unit that is defined under Set Up CRM, Security, User Preferences, Sales. The business unit is used to get the setID, which becomes the default value in companies that are created from the device.
	Each user requires a localization country that is defined under Set Up CRM, Security, User Preferences, Over Preferences. This is used as the default country value for addresses that are created on the device.
	Country is a required address field in PeopleSoft Enterprise Mobile Sales for BlackBerry. When synchronization occurs between PeopleSoft Enterprise Mobile Sales for BlackBerry and the native application and the country entered on the native application is invalid, PeopleSoft Enterprise Mobile Sales for BlackBerry replaces it with the default country value that is specified in the user preferences of that user.
	<p>When adding address information to contacts and companies, for instance, make sure to fill out complete addresses (including address line, city, state, country, and postal code). Data should be valid and formatted correctly (for example, <i>CX</i> is an invalid American state, and <i>Calif</i> is in a wrong format); otherwise, the address will not pass validation in the CRM server and will be discarded as a result.</p> <p>While invalid information is removed in the synchronization process, other valid information of the data record is kept. In other words, if the address is invalidated, but other contact information (such as the mail address, name, and phone number) is not, then the other information will be uploaded to the CRM server accordingly.</p>
	The native BlackBerry applications do not perform validation on fields that are required by PeopleSoft Enterprise Mobile Sales for BlackBerry.
	If you use the dataset rule that downloads contacts that are specified in the user's My Contacts list, make sure to enable the My Contacts feature in the PeopleSoft CRM connected environment for contacts in that list to be downloaded to the BlackBerry device. This rule automatically adds contacts in leads and opportunities that are maintained by the user to the My Contacts list.
Task	All open tasks are downloaded to users' devices based on delivered dataset rules.
	You can add new or modify existing rules in the CRM system.
	Tasks can be assigned to contacts in the native BlackBerry contact list who are not in the PeopleSoft database.
	From the tear sheet of the Task entity, contacts and assignees are read-only.

Data Conflict

The conflict resolution rule that is adopted is *last in wins*.

Sales Territory Reorganization

After you perform a sales territory reorganization on the CRM server, make sure to reload data on the User List page of the PeopleSoft Wireless WorkSpace Console for users who have been affected. Refer to the online help of the PeopleSoft Wireless WorkSpace Console for more information about data reload.

Password Change

If you change your password on the server, you must also update it on the BlackBerry device from the trackwheel menu.

Profile Creation

The PeopleSoft user that is used during profile creation on the PeopleSoft Wireless WorkSpace Console must be a valid sales user with defined sales preferences. To specify the sales preferences for a user, navigate to Set Up CRM, Security, User Preferences and specify these values for the user: Localization Country, Business Unit, and SetID on the Overall Preferences page and Sales Business Unit on the Sales page. Refer to the RIMADMIN user that is delivered in the application as an example when defining these PeopleSoft users.

Profile Refresh

When setup values are modified on the PeopleSoft CRM server, you must refresh the Mobile Data Set Profile on the PeopleSoft Wireless WorkSpace Console so that these updates are reflected on users' BlackBerry devices. The setup values affected include, but are not limited to, Lead Status, Lead Rating, Lead Sales Priority, Lead Source, Lead Type, Lead Rejection Code, Opportunity Status, Opportunity Sales Model, Opportunity Sales Stage, Opportunity Fallout Reason, Task Type, Task Priority, and State/Province list.

To refresh the profile definition, edit it on the PeopleSoft Wireless WorkSpace Console. Enter the password that the CRM user uses to connect to PeopleSoft CRM, and click the Next button until you get to the final screen, which has a Save option. When this is done, the refreshed profile will automatically be pushed to all devices.

If the delivered Sales Rep profile is used, it should be refreshed to ensure that all setup values are deployed to all users.

Setup Values in Multiple SetIDs

If you have sales users who span multiple setIDs, you must create a separate profile for each setID. Each of these profiles must use a different PeopleSoft user, and each of these user's sales preferences must point to the desired setID. Please refer to the section on creating a Mobile Profile in the PeopleSoft Wireless WorkSpace Console administrator guide for further details.

PART 3

PeopleSoft Enterprise CRM Mobile Applications

Chapter 5

Understanding PeopleSoft Enterprise CRM Mobile Applications

Chapter 6

Setting Up Data Distribution for a Mobile Device

Chapter 7

Working with Customer, Task and Product Information on a Mobile Device

Chapter 8

Using PeopleSoft Enterprise Mobile Order Capture

Chapter 9

Using PeopleSoft Enterprise Mobile Sales

Chapter 10

Using PeopleSoft Enterprise Mobile Account Planning

Chapter 11

Using PeopleSoft Enterprise Mobile FieldService

CHAPTER 5

Understanding PeopleSoft Enterprise CRM Mobile Applications

This chapter provides an overview of mobile device initialization and discusses how to:

- Initialize mobile devices.
- Perform synchronizations.
- View errors and notifications.
- Start mobile applications.

Understanding Mobile Device Initialization

Before you can initialize and begin using Oracle's PeopleSoft Enterprise Customer Relationship Management (PeopleSoft CRM) mobile applications, install PeopleSoft Mobile Agent on the mobile device.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Mobile Agent*.

When you initialize a mobile device, application metadata and business data are installed for the first time. Although PeopleSoft Mobile Agent may be installed on the device by an administrator, only the user of Mobile Agent (defined by user ID and user role) can synchronize application metadata and business instance data from the server to the device.

Note. In this documentation, the term *instance data* is used interchangeably with the term *business data*, and the term *metadata* with the term *application metadata*.

Initializing Mobile Devices

Initializing a mobile device first requires a bootstrap synchronization (initialization). To perform a bootstrap synchronization:

1. Install PeopleSoft Mobile Agent software on the device.
2. Perform a bootstrap synchronization.
 - a. Verify that the PSMOBILE.INI file in the WINNT folder identifies the server you will use to transfer mobile application data between the server and the remote device when you launch the application.

This URL should be identified in the SyncGateway parameter. (For example, SyncGateway=http://psuser110200/SyncServer.)
 - b. Launch PeopleSoft Mobile Agent by selecting Start, Programs, PeopleSoft Mobile Agent, Start PeopleSoft Mobile Agent.

If PeopleSoft Mobile Agent is already running on the local machine, you can stop the application by selecting Start, Programs, PeopleSoft Mobile Agent, Stop PS Mobile Agent.

- c. Select Start, Programs, PeopleSoft Mobile Agent, PS Mobile Application.

If the device was not previously initialized, the PeopleSoft Mobile Device Bootstrap page appears.

- d. Sign in to the application with the user ID and password.

The user ID, such as the delivered user ID and password FLDSLSREP and FLDSLSREP, identifies the appropriate application metadata (application definitions) and instance data (business data) to be downloaded to the device. When you sign in, the synchronization begins, and you must wait for this process to complete before launching the application. Subsequent synchronizations do not require a complete synchronization of both metadata and instance data, but only upload changes from the device to the server and reconcile changes between the device and server.

- e. Click Synchronize.

The PeopleSoft Mobile Synchronization Results page appears, showing the progress of the bootstrap synchronization.

When complete, check for alerts or notifications.

Both the PeopleSoft Mobile Agent and the mobile application should now be running. You are now ready to use the mobile application.

Performing Synchronizations

After device initialization, you have three synchronization options: upload changes, update business data, and update applications. This section discusses how to:

- Upload changes only.
- Update business data.
- Update applications.

Synchronize with the mobile device connected and logged on to the company network server. You can be connected directly to the local area network through either dialup or broadband internet access.

Uploading Changes Only

Use this option to update changes from the mobile device to the server. Data that is received from the server is limited to error responses to your update requests and server-side changes that are made to objects that you updated.

Note. The Upload Changes option is responsible for uploading data updates from the mobile device to the server; it does not download new or updated data that are not referenced in the updated object from the server back to the mobile device. It will download new objects that are referenced by the uploaded objects. To receive updates to all of your data on both sides, perform Update Business Data.

To upload changes:

1. On the application, select Synchronization, Upload Changes.

The Upload Changes page appears.

2. Enter the user ID and password.

3. Click Synchronize.

The PeopleSoft Mobile Synchronization Results page appears, showing the progress of the synchronization.

4. When the synchronization is complete, check for synchronization errors and notifications.

Updating Business Data

Use this option to reconcile the business data on the device with the data on the server. All of the updates are first uploaded to the server for processing, and any errors are returned to the device. After uploading changes, any modified or new data on the server is downloaded onto the device. If data that you modified on your device generates an error, and the same data was modified on the server, the new data is not retrieved until you reconcile the errors. To send only your changes to the server, perform Upload Changes Only.

To perform a full synchronization:

1. Select Synchronization, Update Business Data.

The Update Business Data page appears.

2. Enter the user ID and password.
3. Click Synchronize.

The PeopleSoft Mobile Synchronization Results page appears, showing the progress of the synchronization.

4. When the synchronization is complete, check for synchronization errors and notifications.

Updating Applications

With this option, you first attempt to upload all changes from the device. If any errors occur during this upload, the Update Applications option terminates. Resolve all errors before performing the Update Applications option again. If the upload is successful, the option retrieves the current version of your business applications. If your applications load successfully, a full synchronization is performed to load business data onto the device. The action taken by the Update Applications option is irreversible.

To update applications:

1. Select Synchronization, Update Applications.

The Update Applications page appears.

2. Enter the user ID and password.
3. Click Synchronize.

The PeopleSoft Mobile Synchronization Results page appears, showing the progress of the synchronization.

4. When the synchronization is complete, check for synchronization errors and notifications.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Mobile Agent

Viewing Errors and Notifications

After initialization or any other synchronization, you can view errors and notifications.

To view errors:

1. Select Alerts, Error List.
2. Click the ID link of any error to view additional information.
3. Either click the Delete Error link to remove the data change that caused the synchronization to fail, or use information that the message provides to correct the error.

You can try synchronizing again.

To view notifications:

1. Select Alerts, Notifications.
2. View notifications that were sent to you during synchronization.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Mobile Agent

Reviewing and Correcting Synchronization Errors

After viewing synchronization errors, you can correct errors, depending on the nature of the error and the information that is provided.

If the error is related to a system problem, such as invalid password and that the synchronization server is not available, attempt the synchronization again. If the error is related to a conflict with a server-side change (after evaluation by the conflict resolution rules that are defined for the application), delete the error or change and accept the new data. If the error is related to a business-rule violation, the text of the message should contain enough information to identify the changes that are required. Correct the errors and then attempt the synchronization again.

Because business-rule validation occurs only during synchronization, be careful to enter only valid values when creating, editing, or changing business information.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Mobile Agent

Starting Mobile Applications

To start licensed mobile applications, users need to run the PeopleSoft Mobile Agent first. To do so:

1. Select Start, Programs, PeopleSoft Mobile Agent, Start PS Mobile Agent to launch PeopleSoft Mobile Agent.
2. Select Start, Programs, PeopleSoft Mobile Agent, PS Mobile Application to launch the application itself in the browser.

CHAPTER 6

Setting Up Data Distribution for a Mobile Device

This chapter provides an overview of data distribution and discusses how to:

- Define mobile customer options.
- Define mobile attachment rules.
- Set up out-of-date detection.
- Enable basic data processing.

Understanding Data Distribution

Mobile devices may have limited processing power, storage capacity, and display space. You can limit the range and quantity of data that is passed to the mobile device by specifying a data distribution method.

Data distribution is used in mobile applications to:

- Implement security.
- Filter needed data to download to the mobile device.

Depending on the business objects, mobile applications use these methods to distribute data from the database to the mobile device:

- Dataset rules.

Defining dataset rules creates SQL statements that run during synchronization to select the dataset that is delivered to the mobile device. The result of data distribution rules is a set of data that is appropriate to the user's roles. The dataset may differ depending on the mobile device.

- Spider out.

The result of spidering is that rows of data can be required for the mobile device in addition to those that are selected by the OnSelect event. For example, a contact list on a mobile device includes three people: two from the U.S. states of New York and New Jersey and one from the Canadian province of Ontario. The OnSelect event for state calls for only states or provinces that are in the U.S. Using spidering, the Sync Server retrieves all the U.S. states and also Ontario because Ontario is referenced in the address of a company that is selected to download to the mobile device. Therefore, Ontario, as a state (province) data row, is downloaded (spidered down) and present on the mobile device.

This table lists the data distribution methods that customer data model (CDM) objects use:

Object	Data Distribution Method
Company (RDM_COMPANY_2)	<p>This object uses:</p> <ul style="list-style-type: none"> • Dataset rules. • Spider out. <p>It is referenced by transactions such as lead, opportunity, or relationship between a contact and company. Companies will be downloaded along with those leads, opportunities, contacts, and so on.</p>
Person (RDM_PERSON_CI)	<p>This object uses:</p> <ul style="list-style-type: none"> • Dataset rules. • Spider out from company and consumer as contact, as well as from reference by other transactions such as contact of a lead or contact in a task.
Site (RDM_SITE_2)	<p>This object uses:</p> <ul style="list-style-type: none"> • Dataset rules. • Spider out from company and consumer as well as from reference by transactions, such as service order or sales order.

Relationship Component (BO_REL_MOBILE)

The Relationship component sources the data that is in the relationship viewer of various components.

Using dataset rules, you can restrict the amount of relationship instances that are downloaded to the mobile device. If the distribution rules are too restrictive, then only a small number of relationships will be downloaded. Conversely, if the rules are too broad, then performance may suffer as too many transactions are downloaded to the device during synchronization. An option in the mobile installation options enables relationships to spider out from the customer components. This option enables automatic spider-out of relationships one level deep from each customer. This mechanism supplements or replaces data distribution rules.

See Also

PeopleSoft Enterprise Components for CRM 9 PeopleBook

Enterprise PeopleTools PeopleBook: PeopleSoft Mobile Agent

Enterprise PeopleTools PeopleBook: PeopleCode Language Reference

Defining Mobile Customer Options

This section discusses how to define mobile customer options.

In PeopleSoft Enterprise CRM, you can define the options for using the CDM for the mobile application. CDM maintains entries and relationships among company, site, contact, consumer, worker, and other business entities.

Page Used to Define Mobile Customer Options

Page Name	Object Name	Navigation	Usage
Mobile Customer Option	RDM_MOBILE_DFLT	Set Up CRM, Install, Mobile, Mobile Customer Option	Define general options for displaying customer information on mobile devices.

Defining Mobile Customer Options

Access the Mobile Customer Option page.



Mobile Customer Option

Mobile Options MSALE

***Description** Mobile Sales Option

Default SetID CRM02

Default Country USA

☐ Read Only

☒ Show Relationship Viewer

☒ Spider Out To Customer

☒ Show 360 Degree View

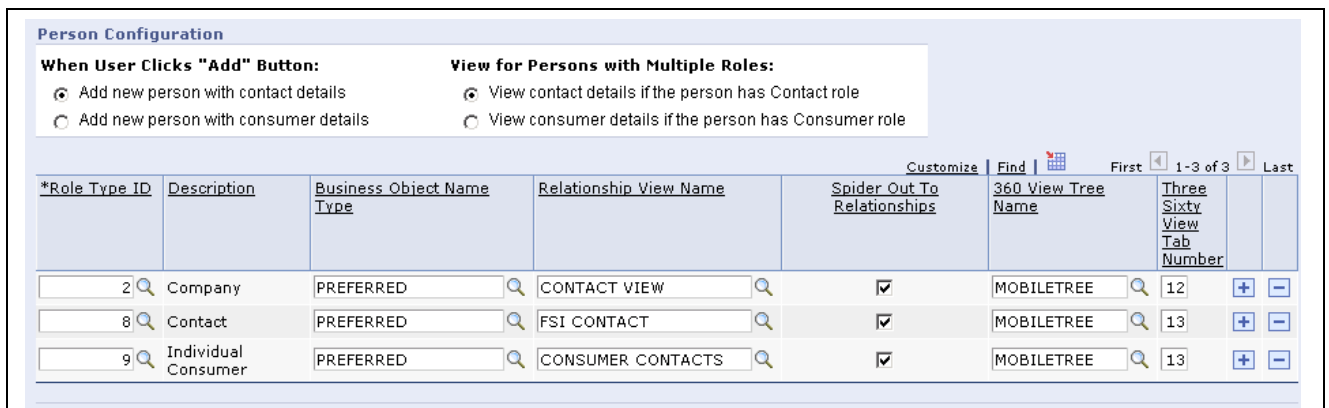
Purchasing Option

☒ Bill To Customer

☒ Ship To Customer

☒ Sold To Customer

Mobile Customer Option page (1 of 2)



Person Configuration

When User Clicks "Add" Button:

☒ Add new person with contact details

☐ Add new person with consumer details

View for Persons with Multiple Roles:

☒ View contact details if the person has Contact role

☐ View consumer details if the person has Consumer role

*Role Type ID	Description	Business Object Name	Relationship View Name	Spider Out To Relationships	360 View Tree Name	Three Sixty View Tab Number
2	Company	PREFERRED	CONTACT VIEW	<input checked="" type="checkbox"/>	MOBILETREE	12
8	Contact	PREFERRED	FSI CONTACT	<input checked="" type="checkbox"/>	MOBILETREE	13
9	Individual Consumer	PREFERRED	CONSUMER CONTACTS	<input checked="" type="checkbox"/>	MOBILETREE	13

Mobile Customer Option page (2 of 2)

Mobile Options

Enter the name of this customer option profile.

Default SetID

Specify a setID that is used for filtering customer data.

Read Only	Select to have all CDM information (for companies, persons, and sites) that is downloaded to the mobile device be read-only.
	Note. This option applies to PeopleSoft Mobile FieldService only.
Show Relationship Viewer	Select to display the Relationship Viewer on mobile devices.
Spider Out To Customer	During a synchronization, this option controls whether the synchronization process spiders out to retrieve the full object, that is, Company, Consumer, and so forth, or if only the name is retrieved.
	Note. If you select this option, system performance may decrease slightly.
Show 360 Degree View	Select to display the 360-Degree View on mobile devices.
Purchase Option	<p>Select one or more of these purchase options:</p> <ul style="list-style-type: none"> • Bill To Customer: Select this check box if you want customers created on the mobile device to be Bill To customers. An address that is created for a Bill To customer will automatically be marked as a Bill To address, and the primary address will automatically be marked as a Primary Bill To address. A Bill To customer can receive invoices for purchases. • Ship To Customer: Select this check box if you want customers created on the mobile device to be Ship To customers. Note that an address that is created for a Ship To customer will automatically be marked as a Ship To address, and the primary address will automatically be marked as a Primary Ship To address. A Ship To customer can receive shipments for products or services. • Sold To Customer: Select this check box if you want customers created on the mobile device to be Sold To customers. Note that addresses that are created for a Sold To customer will automatically be marked as a Sold To address, and the primary address will automatically be marked as a Primary Sold To address. A Sold To customer can purchase products or services.
Person Configuration	<p>Select the default actions to perform in the Person component when users click the Add button and when they view persons who have multiple roles on the device.</p> <p>Select a default action when users click the Add button:</p> <ul style="list-style-type: none"> • <i>Add a new person record with contact details.</i> • <i>Add a new person record with consumer details.</i> <p>Select a default action when users view persons who have multiple roles:</p> <ul style="list-style-type: none"> • <i>View contact details if the person has a Contact role.</i> • <i>View consumer details if the person has a Consumer role.</i>
Role Type ID	Displays the identification code that is associated with the business object role type. When you add a new role type, the system automatically assigns a value using automatic numbering functionality.
Description	Displays the role for which you want to view relationships.

Business Object Name Type	Select the type of business object name to apply to the corresponding role type. Values are <i>preferred</i> and <i>alternate</i> .
Relationship View Name	Select the relationship view that you want to associate with the role.
Spider Out To Relationships	As transactions are encountered during a synchronization, this option controls whether the synchronization process spiders out to the relationships. <hr/> Note. If both the Spider Out To Relationships and Spider Out To Customer options are selected, all customer data is moved to the mobile device. Depending on the volume of customer data in the system, performance can be affected. <hr/>
360 Degree Tree Name	Select a 360-Degree View tree that displays all activities and interactions for the company or contact. It can also display an add and search node for the particular activity of the tree. Click the detail link to navigate to the detail pages for the activity. Click the add link to access a page where you can add the activity. Click the search link to access a page where you can search for the activity.
Three Sixty View Degree Tab Number	Displays the tab number of the page in the corresponding component.

See Also

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

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, “Business Object Management Basics”

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Interactions and 360-Degree Views”

Defining Mobile Attachment Rules

This section discusses how to:

- Define attachment rules for the PeopleSoft Enterprise Mobile Sales.
- Define attachment rules for the Mobile Product component.
- Define attachment rules for the PeopleSoft Enterprise Mobile Order Capture.
- Define attachment rules for the PeopleSoft Enterprise Mobile FieldService.

Before using the mobile product, set up these attachment settings:

- Type of attachments.
- Custom size of attachments (if you want to specify the size of some attachments).
- Size of product images to be displayed on the mobile device.

Pages Used to Define Mobile Attachment Rules

Page Name	Object Name	Navigation	Usage
Mobile Rules	RSF_SYNC_ATTACH	Set Up CRM, Business Unit Related, Mobile Rules	Define attachment rules for the PeopleSoft Enterprise CRM Mobile Sales application.
Mobile Product Defaults	MOC_OPTIONS_PG	Set Up CRM, Install, Mobile, Mobile Product Options, Mobile Product Defaults	Define attachment rules for the Product component on mobile devices.
Mobile Order Capture Defaults	MOC_OC_OPTIONS_PG	Set Up CRM, Install, Mobile, Mobile Order Capture Options, Mobile Order Capture Defaults	Define attachment rules for the PeopleSoft Enterprise CRM Mobile Order Capture application.
Mobile Field Service Options	RF_MOB_SYNC_OPT	Set Up CRM, Install, Mobile, Mobile Field Service Options, Mobile Field Service Options	Define attachment rules for the PeopleSoft Enterprise CRM Mobile FieldService application.

Defining Attachment Rules for PeopleSoft Enterprise Mobile Sales

Access the Mobile Rules page.

Mobile Rules page

Note. The Synch to PDA option is no longer in use.

Synch to Laptop(synchronize to laptop)

Select the synchronization options for attachments to be passed down from the database to the mobile devices by business unit. Options are *All*, *Size up to*, and *None*. When you select *Size up to*, enter the maximum attachment size that is allowed in bytes.

Defining Attachment Rules for the Mobile Product Component

Access the Mobile Product Defaults page.

The screenshot shows the 'Mobile Product Defaults' page. It contains two main sections: 'Laptop Settings' and 'PDA Settings'. Each section has an 'Attachments' subsection with a 'Type' dropdown, a 'Size (bytes)' text input, and an 'Images' dropdown. In the 'Laptop Settings' section, 'Type' is set to 'All Attachments' and 'Images' is set to 'No Image'. In the 'PDA Settings' section, 'Type' is set to 'No Attachments' and 'Images' is set to 'No Image'.

Mobile Product Defaults page

Note. The PDA Settings group box is no longer in use.

Laptop Settings

Type	Select the synchronization option for attachments that are to be passed down from the database to the laptop computer. Options are <i>All Attachments</i> , <i>Custom Size</i> , and <i>No Attachments</i> . If you select <i>Custom Size</i> , enter the maximum attachment size that is allowed as well.
Size (bytes)	Specify the size (in bytes) of the attachments that you want to pass down from the database to the laptop computer. The system delivers only attachments that are less than the specified size.
Images	Select the size of the product images that you want to pass down from the database to the laptop computer. Values are <i>Large Image</i> , <i>Medium Image</i> , <i>No Image</i> , <i>Small Image</i> , and <i>Zoom Image</i> .

Defining Attachment Rules for PeopleSoft Enterprise Mobile Order Capture

Access the Mobile Order Capture Defaults page.

Mobile Order Capture Defaults page

Note. The PDA Options group box is no longer in use.

Laptop Settings

- Type** Select the synchronization option for attachments that are to be passed down from the database to the laptop computer. Options are *All Attachments*, *Custom Size*, and *No Attachments*. If you select *Custom Size*, enter the maximum attachment size that is allowed as well.
- Size (bytes)** Specify the size (in bytes) of the attachments that you want to pass down from the database to the laptop computer. The system delivers only attachments that are less than the specified size.

Defining Attachment Rules for the PeopleSoft Enterprise Mobile FieldService

Access the Mobile Field Service Options page.

Mobile Field Service Options page

Laptop Options and PDA Options

Type	Select the synchronization option for attachments that are to be passed down from the database to the laptop computer and the personal digital assistant (PDA). Options are <i>All Attachments</i> , <i>Custom Size</i> , and <i>No Attachments</i> . If you select <i>Custom Size</i> , enter the maximum attachment size that is allowed as well.
Size (bytes)	Specify the size (in bytes) of the attachments that you want to pass down from the database to the laptop computer and the PDA. The system delivers only attachments that are less than the specified size.

Setting Up Out-of-Date Detection

This section discusses how to set up out-of-date detection.

The four CDM components (Company, Person, Worker, and Site) in the mobile applications use the Basic Data table to accommodate out-of-date detection. To set up for out-of-date detection, you must enable basic data for the company, person, worker, and site roles on the Role Type page.

Page Used to Set Up Out-of-Date Detection

Page Name	Object Name	Navigation	Usage
Role Type	RBM_DD_ROLE	Set Up CRM, Common Definitions, Customer, Role Type	Set up out-of-date detection for role types.

Setting Up Out-of-Date Detection

Access the Role Type page.

Select the Enabled for Basic Data option, which enables the maintenance of the Basic Data table and out-of-date detection for mobile customer applications.

See Also

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

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Interactions and 360-Degree Views”

Enterprise PeopleTools PeopleBook: PeopleSoft Mobile Agent

Enabling Basic Data Processing

This section discusses how to enable basic data processing.

Page Used to Enable Basic Data Processing

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	Enable basic data processing for mobile applications.

Enabling Basic Data Processing

Access the Customer Data Management System Options page.

Process Basic Data Summary

Select this check box if PeopleSoft mobile applications are in use. This feature updates basic data tables and overrides the setting for roles.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, “Defining Control Values for Business Objects,” Defining Customer Data Management System Options

CHAPTER 7

Working with Customer, Task and Product Information on a Mobile Device

This chapter provides an overview of customer information, address books, tasks, call reports, and products in PeopleSoft Enterprise Customer Relationship Management (CRM) mobile applications and discusses how to:

- Work with companies, contacts, consumers, workers and sites on a mobile device.
- Work with address book entries on a mobile device.
- Work with tasks on a mobile device.
- Work with call reports on a mobile device.
- Work with products on a mobile device.

Understanding Customer Information in Mobile Applications

PeopleSoft Enterprise CRM mobile applications enable you to view customer information for one predefined business unit on mobile devices. The functionality that is available on the device may differ, depending on the device and the permissions and dataset rules that are set by the administrator.

Note. Although the business units that mobile applications use can be different, their business units must be referenced to the same setID for product and customer. Note that the setIDs for product and customer can be different.

Object	Actions Available
Company	<ul style="list-style-type: none">• Add and view companies.• Add and update contacts.• Add and update call reports.• Add and view tasks.• Maintain notes and attachments.• Add and modify address book entries.• View site information.• View account team, account plan, and financial accounts (if the company belongs to the Financial Service or Insurance industry market).• View the relationship between a company and its contacts. <hr/> <p>Note. When configuring the relationship viewer for a company, select views where the role of the company would be at the top of the tree.</p> <hr/> <ul style="list-style-type: none">• Access the company's 360-Degree View for transactions, such as cases, leads, opportunities, orders, quotes, agreements, defects, RMAs (return material authorizations), and installed products. <p>You can click links on tree nodes to transfer to corresponding components to view details. Additional actions, such as background processing, cannot be initiated from the 360-Degree View from a mobile device.</p>

Object	Actions Available
Person	<ul style="list-style-type: none"> • Add persons (contacts or consumers). • View and modify persons in the persons' contact or consumer role. • View worker information (if the person is a worker). • Add and modify address book entries. • View site information. • Maintain notes and attachments. • View associated companies. • Add and update tasks. • Add and update call reports. • View the relationship between a person and its customers. <hr/> <p>Note. When configuring the relationship viewer for a person, select views where the role of the consumer or contact would be at the top of the tree.</p> <hr/> <ul style="list-style-type: none"> • View account team, account plan, and financial account (if the market is Financial Services or Insurance) through the person's consumer role if applicable. • Access the person's 360-Degree View for associated transactions, such as cases, leads, opportunities, orders, quotes, agreements, defects, RMAs (return material authorizations), and installed products. <p>You can click links on tree nodes to transfer to corresponding components to view details. Additional actions, such as background processing, cannot be initiated from the 360-Degree View from a mobile device.</p>
Site	<ul style="list-style-type: none"> • Access the parent company. • View address book entries.
My Contacts	<ul style="list-style-type: none"> • Add and view contacts. • Add and remove contacts from the My Contacts list on the Person detail page.

If the alternate character functionality is enabled, the system displays a person name in the *LastName FirstName* format if you enter an alternate character (for example, Japanese) in the person's first name or last name. However, if no alternate character appears in the name, the system displays it in the *FirstName,LastName* format.

See Also

Chapter 7, "Working with Customer, Task and Product Information on a Mobile Device," Viewing Worker Information, page 52

Understanding Address Books in Mobile Applications

PeopleSoft Enterprise CRM mobile applications enable you to create and modify address book entries for these CDM objects: companies and persons (address book entries appear in the read-only mode for sites). An address book entry contains different sets (for example, home, work,) of phone, address, and email information that is entered for a company or person. Mobile users can create and update address book entries on the connected server or mobile devices and have the information synchronized in both systems.

To support address books in mobile applications, setup information such as address book configuration, contact method type, and contact method purpose type that are set up in PIA are downloaded to mobile devices during synchronization. The information is used to determine default values for certain fields in an address book entry.

How is Contact Information Displayed on Mobile Devices

A person in CDM can have more than one role. When mobile users access the address book of persons with multiple roles (for example, both business contact and consumer), the address book displays entries that are specific to one role at a time. As for company, the address book on the Contact Info page displays a summary grid of all contacts and their entries despite from where this page is accessed (from consumer details or contact details). That is, the summary grid shows a list of all entries without taking role into consideration.

When mobile users create new entries for persons with multiple roles, the system transfers them to a page where they enter the contact information (which can contain a number of contact methods). After the data is synchronized, the contact information that is entered for one role becomes available to the other role as well. If the primary setting of any contact method is checked, the other role also inherits that setting.

The primary setting of a contact method is displayed in a form of a check box, and it appears selected if mobile users access the details of the contact method from the summary grid and the contact method is set to be primary for the person's role that mobile users are viewing. In other words, if the person is viewed as a contact, and the contact method being viewed is set to be primary for the contact role, then the Primary check box appears as selected on the details page. However, if mobile users view this contact method through person's consumer role, the Primary check box remains clear.

The title of the Person component pages indicates the role (business contact or consumer) of the person that is being accessed. The system displays a warning message if the user-selected address book entry doesn't apply to the role of the person being viewed (it is possible for mobile users to define contact methods for only one role). When this happens, the role-specific contact method cannot be selected as primary for the role to which it does not pertain. Mobile users can, however, still view the contact method through either role in the details page. For example, a user enters a phone number that only pertains to the consumer role. This number (in a contact entry) is viewable through the consumer and contact roles and can also be updated on the details pages for both roles. However, if this number is marked as primary for the consumer role and it's being viewed through the contact role, a warning message appears and prevents the number from being set as primary for the contact role because the number does not apply. If the user changes the consumer-specific contact method while in the contact view, the data will be saved only to the consumer role and not the contact role.

The system allows only one entry to be the primary entry for each contact method in each role. For example, there can only be one primary address (a contact method) for John Doe as a consumer (a role). When mobile users remove all data from a contact method, they are in effect deleting that contact method from the address book. The same thing is true for removing all contact method information in an entry, which means deleting that address book entry.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, "Defining Name and Address Information for Business Objects," Defining Customer Contacts

Understanding Tasks in Mobile Applications

PeopleSoft Enterprise CRM mobile applications enable you to create and view tasks. A task enables a relationship manager to plan and manage day-to-day activities that are associated with managing an account. Examples on tasks are attending meetings, following up on prospects, or sending birthday cards to a valued customer.

See Also

[Chapter 7, “Working with Customer, Task and Product Information on a Mobile Device,” Working with Tasks on a Mobile Device, page 56](#)

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Working with Tasks,” Understanding Task Management

Understanding Call Reports in Mobile Applications

PeopleSoft Enterprise CRM mobile applications enable you to create and view call reports. Call reports are available both from the left navigation and in components from which they are created (company, person, lead, or opportunity).

See Also

[Chapter 7, “Working with Customer, Task and Product Information on a Mobile Device,” Creating Call Reports, page 61](#)

Understanding Products in Mobile Applications

PeopleSoft Enterprise CRM mobile applications enable you to view product information for one predefined business unit on mobile devices.

Note. Both PeopleSoft Enterprise Mobile Sales and PeopleSoft Enterprise Mobile Order Capture use products for their transactions. Although the business units that mobile applications use can be different, their business units must be referenced to the same setID for product and customer. However, the setIDs for product and customer can be different.

Object	Actions Available
Product	View product information.

See Also

[Chapter 7, “Working with Customer, Task and Product Information on a Mobile Device,” Accessing Product Information, page 63](#)

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

Working with Companies, Consumers, Contacts, Workers and Sites on a Mobile Device

This section discusses how to:

- Access companies.
- Access contacts and consumers.
- View worker information.
- Access sites.
- Access My Contacts.

Note. If you enter invalid information in a company or contact record, or fail to enter required information, an error may occur during synchronization. Be sure that the information that you enter is valid for that object, and be sure to complete all required fields (marked with *).

See Also

PeopleSoft Enterprise Components for CRM 9 PeopleBook

Pages Used to Work with Companies, Consumers, Contacts, Workers, and Sites On a Mobile Device

Page Name	Object Name	Navigation	Usage
Company	RDM_COMPANY_2	CRM, Company	Add, update, or view company information.
Person	RDM_PERSON	CRM, Person	Add, update, or view contact or consumer information; view worker information
Task	RDM_COMPANY_2, RDM_PERSON, RB_TSK2	<ul style="list-style-type: none"> • CRM, Company, Task • CRM, Person, Tasks • CRM, My Task 	Add and view task summaries. Users can view task details by clicking the corresponding button from Company or Person page. User can also view, add, or modify task from My Task list by click the task hyperlink.

Page Name	Object Name	Navigation	Usage
Contacts	RDM_COMPANY_2	CRM, Company, Contacts	Add and view of contacts that are associated with the company. Click the name link to access the Person component for details.
Customers	RDM_PERSON	CRM, Person, Customers	View a list of companies that are associated with the person. Click the View Customer button to access the Company component for details.
Worker	RDM_WORKER	<ul style="list-style-type: none"> Person Select a person who is a worker and click the View Worker Information button on the Person page. My Contacts Click the View Worker Information button on the Person page. The button appears if the person being viewed is a worker. 	View worker information.
Site, or Sites	RDM_SITE_2, RDM_COMPANY_2	<ul style="list-style-type: none"> CRM, Site Access the company's Sites page 	View site information.
Notes	RDM_COMPANY_2, RDM_PERSON	<ul style="list-style-type: none"> CRM, Company, Notes CRM, Person, Notes 	Add and view notes.
Relationship Viewer	RDM_COMPANY_2, RDM_PERSON	<ul style="list-style-type: none"> CRM, Company, Relationship Viewer CRM, Person, Relationship Viewer 	View company's or person's relationships.
360 View	RDM_COMPANY_2, RDM_PERSON	<ul style="list-style-type: none"> CRM, Company, 360 View CRM, Person, 360 View 	View and access transactions that are associated with the company or person.
My Contacts	RDM_CONTACT_LIST	My Contacts	Add and view a list of contacts that are associated with the mobile user.

Accessing Companies

Access the Company component.

Company page

The mobile version of the Company component provides a subset of functionality that is available in its server version. Here are some of the behavior of the component when it's in mobile mode. It:

- Supports global address formats.
- Does not support the display of company profile information.
- Does not support edits on roles, relationships, sites, purchasing options, attributes, or account information.
- Does not support currency type edits.
- Determines the default company currency from the user preferences.
- Sets the default company setID to the default setID, as determined by the user preferences, when new companies are created.
- Sets the company market to the mobile user's default market, as determined by user's user preferences, when new companies are created. If the market is not specified in user preference then *GBL* is the default value.

See Also

[Chapter 7, "Working with Customer, Task and Product Information on a Mobile Device," Understanding Customer Information in Mobile Applications, page 43](#)

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

Accessing Contacts and Consumers

Access the Person component to view contacts and consumers.

Person | Tasks | Call Reports | Customers | Notes | Contact Info | Relationship Viewer

Save | Add New Person | Return to List | Add to My Contacts | Remove from My Contacts

Name: Agnes Bardini

Country: USA United States

Title: Support Analyst

***First Name:** Agnes

***Last Name:** Bardini

Birthdate: 11/08/1950

Middle:

Suffix:

Gender: Female

User Defined Fields

Field 1:

Field 2:

Field 3:

Field 4:

Field 5:

Field 6:

Field 7:

Field 8:

Field 9:

Field 10:

Edit Consumer Information

Save Return to List

Person page

A person may have one or multiple roles among Contact, Consumer, and Worker roles. The Person page displays different information based on the role of the person. On the Person search page, there is an indication of the roles a person has. If a user opens a Person page and the person has multiple roles, the details that initially appear on the page are based on the setup in the Person Configuration section of the Mobile Customer Options page. However, mobile users can choose to open or add a different role to the person from the initial Person page. The setup in the Person Configuration section determines which view will show when the user adds a new person.

If a person has multiple roles, users can view the different role information using the buttons at the bottom of the Person page. For example, when users view persons with the contact role on the Person page, clicking the Edit Consumer Information link brings users to the consumer view of persons. Similarly, if users view contacts who also have the worker role, clicking the View Worker Information link transfers users to the Worker page.

For example, suppose that the person configuration is set to add new person with contact details when users click the Add button, and view contact details (if the person has the contact role) when users view persons with multiple roles. When a new person is added, it takes the contact role and users can see the Add Consumer Information button at the end of the page. If users click the button and select *Yes* when asked whether the current data (contact details in this case) needs to be save before proceeding, the system first saves the contact information and then creates a consumer role for the person. If users select *No*, the system proceeds to creating a consumer role of the person and bypasses the contact role.

Now suppose that a user wants to view an existing person. If that person has only a contact role, the person is opened in the contact view and the user can see the Add Consumer Information button at the end of the page. If the person has a consumer role, it is opened in the consumer view and the Add Contact Information button appears. If the person has a worker role, it is opened in the Worker page. The person may have two roles (both contact and consumer), in this case, the contact view of the person is displayed initially and the user sees the Edit Consumer Information button at the end of the page. In a situation where the person has three roles (contact, consumer and worker), the contact view of the person is displayed, along with the Edit Consumer Information and View Worker Information buttons on the page. Workers can only be viewed, not added on a mobile device.

The mobile version of the Person component provides a subset of functionality that is available in its server version. Here are some of the behavior of the component when it's in mobile mode. It:

- Provides up to 10 user definable fields for storing additional information for a person.

The information entered here can only be viewed by the user whose account they were created from. The information can be viewed either from the server or the mobile device. The labels of those fields cannot be changed on mobile — they can be changed only from online Person page.

- Does not support edits on roles, relationships, user profiles, bill payees, or purchasing options.
- Does not support edits on employment or credit card information.
- Does not support currency type edits.
- Supports global address formats.
- Sets the setID to the default setID, as determined by the users preferences, when new persons are created and the role is consumer.
- Sets the market to be the default market, as determined by the user's preferences, when new persons are created. If no user preferences have been set up for the user account, then *GBL* is default the value.

Note. When users add new contacts to leads or opportunities on the server, make sure to perform an Update Business Data sync so the contact is downloaded to the mobile device. If users wish to add contacts and associate them with companies on the server, it is recommended that the contacts be added from the Company component on the server. Changes are displayed on mobile device after the Update Business Data sync.

See Also

[Chapter 7, “Working with Customer, Task and Product Information on a Mobile Device,” Understanding Customer Information in Mobile Applications, page 43](#)

[Chapter 6, “Setting Up Data Distribution for a Mobile Device,” Defining Mobile Customer Options, page 34](#)

Viewing Worker Information

Access the Worker page.

Worker

Name: Alex Ash

Country: USA United States

Prefix:

First Name: Alex **Middle Name:** Admin

Last Name: Ash **Suffix:**

Phone:

Pager:

[Edit Contact Information](#)

[Save](#)

Worker page

The Worker page displays basic information (read-only) for workers.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, “Defining Workers,” Understanding Workers in CRM

Accessing Sites

Access the Site page.

Site Name: Minneapolis

SetID: CRM01 **Site ID:** 478

Parent Customer: MMA Property Management Group [Transfer To Parent Customer](#)

Address Book Summary [Find](#) [View All](#) [First](#) [1-1 of 1](#) [Last](#)

Description	Address	Phone	Email
Business	1200 Lake Drive Circle Pines, MN 55014	Business: 651/785-6687(2839)	

[Return to List](#)

Site page

The mobile version of the Site component provides a subset of functionality that is available in its server version. Here are some of the behavior of the component when it's in mobile mode. It:


- Provides a button to transfer to the parent company.
- Displays simple address book information.

See Also

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

Accessing My Contacts

Access the My Contacts page.

Find View All  First 1-2 of 2 Last									
Last Name	First Name	Title	Company	Phone	Email	City	State	Postal	Remove
Rawlings	Chad		Chad Rawlings; eGolfclubs.com; Temple Worldwide Electronics	504/654-4638	crawlings@templeelec_psft.com	Charleston	SC	89612	No
Smith	Wallace								No
Add									

My Contacts page

The My Contacts list:

- Provides summary information of persons (with the contact role) that are added to the list.

The My Contacts list is user specific. The list is generated through My Contacts management on the server; or users can add contacts to their lists on the mobile device using the Person component.

- Does not support the ability to import contacts.

Users can add and remove contacts from their lists using the Person component. To remove a contact from the My Contacts list in the database, make sure to run the Upload Change or Update Business Data sync after the deletion to upload the change to the server database.

Note. Users can search contacts from the My Contacts list using various fields including Last Name, First Name, Title, Company that the person represents, Phone, Email address, City, State, and Postal. The last column, Removed, indicates whether or not the person has been marked to be removed from the list on the mobile device.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Working with Contacts,” Understanding Contact Management

Working with Address Book Entries on a Mobile Device

This section discusses how to work with address book entries on a mobile device.

Page Used to Work with Address Book Entries

Page Name	Object Name	Navigation	Usage
Contact Info	RDM_COMPANY_2, RDM_PERSON	<ul style="list-style-type: none"> CRM, Company, Contact Info CRM, Person, Contact Info 	Work with (add, delete, and update) address book entries. Note. For sites, address book entries are read only.
Person (<role>)	RDM_PERSON	<ul style="list-style-type: none"> Click the Details button on the Contact Info page. Click the Add button on the Contact Info page. 	Enter address book entry detail for persons.
Company	RDM_COMPANY_2	<ul style="list-style-type: none"> Click the Company button on the Contact Info page. Click the Add button on the Contact Info page. 	Enter address book entry details for companies.

Working with Address Book Entries

Access the Contact Info page.

Person Tasks Call Reports Customers Notes **Contact Info** Relationship Viewer 360 View

Save Add New Person Return to List Add to My Contacts Remove from My Contacts

Name: Agnes Bardini

Contact Info Entries Find View All First 1-2 of 2 Last

Description	Address	Phone	Email
Business	1717 East Broadway Dublin, CA 94588	Business: 907/558-6987(335)	
Home	3440 Indian trail Fairbanks, AK 99701	Business: 907/558-6987(3568) Pager: 532/532-7532 Home: 925/877-4014 Cellular: 925/744-8745	abardini@mdeng.com agnesbardini@yahoo.com

Add

Save Return to List

Contact Info page

Entering Address Book Entry Details

Access the Company page or Person (<role>) page.

Person (Business Contact)

Contact Info Entries

***Description:** Business

Phone

Type	Country Code	Number	Ext/PIN	Primary
Business		907/558-6987	335	<input type="checkbox"/>
Cellular				<input type="checkbox"/>
FAX				<input type="checkbox"/>
Pager				<input type="checkbox"/>

Email

Type	Email	Primary
Business		<input type="checkbox"/>
Other		<input type="checkbox"/>

Address

Type: Home

Country: USA United States

Address 1: 1717 East Broadway

Address 2:

Address 3:

City: Dublin

County:

State: CA California

Postal: 94588

Region: Northern California

☐ **Primary Address**

Save Cancel [Return to List](#) [Go Back](#)

Person (<role>) page

Enter contact information for persons and companies.

The default types for phone, email, and address are derived from the address book configuration (specified on the server) and are based on role (individual or organization).

See Also

[Chapter 7, “Working with Customer, Task and Product Information on a Mobile Device,” Understanding Address Books in Mobile Applications, page 46](#)

Working with Tasks on a Mobile Device

This section discusses how to:

- Access My Tasks.
- Manage task details.
- Access My Calendar.

Managing task details on a mobile device is essentially the same as on a tethered device. The only difference is that the mobile application has additional means by which the task details are accessed.


Note. After creating or modifying a task for a consumer or contact on a mobile device, make sure to perform the Update Business Data sync to ensure that the changes are reflected properly on both the server and the mobile device.

Pages Used to Work with Tasks on a Mobile Device

Page Name	Object Name	Navigation	Usage
My Tasks	RBM_TSK	My Tasks	View a list of tasks for the mobile user.
Calendar	RBM_CALANDAR	My Calendar	View users' daily, weekly or monthly calendar entries. Clicking a calendar entry link brings users to the component for which the entry is created.
Task Details,	RBM_TSK	<ul style="list-style-type: none"> Click a task link on the My Tasks page. Select a calendar entry link created for a task on the Calendar page. Click the View Detail button on the company's and person's Task(s) (RDM_COMPANY_2 or RDM_PERSON) page. Click the Detail button on the lead's or opportunity's Task Details (RSFM_LEAD or RSFM_OPPORTUNITY) page. 	Enter or maintain task details.

Accessing My Tasks

Access the My Tasks page.

My Tasks						
				Find View All 	First	◀ 1-3 of 3 ▶ Last
Subject	Task Type	Status	Start Date	Start Time	Time Zone	Owner
Lt2	Phone Call	Open			PST	Peterson, Frank T
lt3	To Do	Open			PST	Peterson, Frank T
Schedule meeting next Tuesday	To Do	Open	04/11/2006		PST	Peterson, Frank T
Add						

My Tasks page

The mobile version of the My Tasks component provides a subset of functionality that is available in its server version. Here are some of the behavior of the component when it's in mobile mode. Users can:

- Access tasks from the My Tasks component or from leads or opportunities that are associated with the tasks.
- Access the My Tasks components for both standalone and transaction-related tasks.

Users cannot delete tasks.

Managing Task Details

Access the Task Details page.

Task Details page

The Task Details page:

- Provides links to the associated lead or opportunity for each task.

The name of the associated lead or opportunity that is displayed on the page may be truncated if it exceeds the space limitation.

- Provides the ability to update tasks.
- Provides the ability to add or view personal tasks.

Note. For tasks with the *custom* type make sure that any custom dates selected in those tasks are not the same as the start date.

- Does not support the deletion of tasks.

If you select *Completed* or *Cancelled* from the Status drop-down list, or add a closed date, the task will be moved to task history for the sales transaction on the server upon synchronization.

Note that the prompt for dates always shows 31 days in a month on mobile devices. Be sure to check that the dates selected are valid before saving the tasks.

Note. For tasks with the *meeting* type, the Assignees section displays meeting invitees. The term *assignees* is synonymous with *invitees*. Select only *Contact*, *Individual Consumer*, or *Worker* as the role for assignees.

If there is more than one contact listed in tasks, users must specify the primary contact before saving the tasks.

When you create a call report from a task, the system copies any associated objects (such as lead, opportunity or company) of the task to the call report as well. At save, the system saves the SYNCID of the task to the related object table of the call report.


When you create a call report from a lead or opportunity, this lead or opportunity becomes the primary related object to the call report, and the company associated with the lead or opportunity (if any) becomes a related object also.

Accessing My Calendar





Access the Calendar page.

Calendar

Name: Peterson, Frank T

Start Date: 04/12/2006 

◀ April 9, 2006 - April 15, 2006 ▶ [This Week](#)

Sunday April 9, 2006	
Monday April 10, 2006	
Tuesday April 11, 2006	 10:00a - 11:00a PST reminder email test Owner: Peterson, Frank T  11:45a - 12:15p PST Default Subject Owner: Peterson, Frank T
Wednesday April 12, 2006	 9:45a - 10:15a PST Meet with Chad Owner: Peterson, Frank T  9:45a - 10:15a PST Set up meeting Owner: Peterson, Frank T
Thursday April 13, 2006	
Friday April 14, 2006	
Saturday April 15, 2006	

Daily Weekly Monthly Add Calendar Entry

Save

Calendar page on a laptop computer

My Calendar:

- Provides daily, weekly and monthly calendar views.
- Provides access to the component for which the task is created.
- Allows users to add tasks in the form of calendar entries.

See Also

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

Working with Call Reports on a Mobile Device

This section discusses how to work with call reports on a mobile device.

Page Used to Working with Call Reports on a Mobile Device

Page Name	Object Name	Navigation	Usage
Call Report, or Call Reports	RDM_COMPANY_2, RDM_PERSON, RSFM_LEAD, RSFM_OPPORTUNITY	<ul style="list-style-type: none"> Call Report Access the Company, Person, Lead, or Opportunity component and select the Call Report(s) page. 	Create or view call reports.

Creating Call Reports

Access the Call Report page.

Call Report

* Subject: Email prospect Date: 04/11/2006 BT

Event Type: Other Location: Lead: Chad Rawlings Lead Go

Notes Summary Find | View All | First 0-0 of 0 Last

Note Summary	Date Added	Added By
Add		

Contacts Find | View All | First 1-1 of 1 Last

Primary	Name	Role	Company
<input checked="" type="checkbox"/>	Chad Rawlings	Contact	Chad Rawlings
Add			

Follow-up Tasks Find | View All | First 1-1 of 1 Last

Description	Location	Status	Start Date	End Date	Name	View Detail
Default Subject		Open	04/11/2006			View Detail
Add Follow-up Task						
Save						

Call Report page

When you create a task from a call report, the system copies any associated objects (such as lead, opportunity or company) of the call report to the task as well. At save, the system saves the SYNCID of the call report to the related object table of the task.

When you create a task from a lead or opportunity, this lead or opportunity becomes the primary related object to the task, and the company associated with the lead or opportunity (if any) becomes a related object also.

General Information

Enter information that describes the event.

Notes Summary

Enter or view notes and attachments that relate to the event.

Contacts

View the list of contacts that attended the event, or add contacts to the call report event.

Follow Up Tasks

View the list of tasks associated with the event. Before creating any new follow up tasks, you must first save the call report if it's new.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Working with Call Reports," Understanding Call Reports

Working with Products on a Mobile Device

Datasets enable role-based filtering and distribution of data. You can determine the right set of products to be downloaded to different mobile devices using dataset rules.

Note. Make sure to verify the dataset rules by clicking the TEST SQL button on the Dataset Rules page. If you enter invalid product information, for example, a set of product ID range that is not in the database, no error will occur during synchronization. However, no product will be synchronized to the mobile device.

PeopleSoft delivers these dataset rules for products (dataset: MOC_PRODUCTS):

- Product range.
You can restrict the range of products that can be passed to the mobile device. For example, you can specify product IDs A1000–A2999.
- Product group.
You can include products from a particular product group.
- Product category.
You can include products from a particular product category.
- All products by a setID.
You can include all products with a particular setID.
- Products for businesses.
You can include any business products.
- Products for consumers.
You can include any consumer products.
- Configurable products.
You can include any configurable products.
- Products by market.

You can include any products for a particular market.

- Products that are based on a dynamically selected business unit.

You can include products for the business unit or setID for the person who is logged on to the mobile device.

See Also

PeopleSoft Enterprise Components for CRM 9 PeopleBook, “Using Datasets”

Common Elements Used in this Section



Indicates that the selected product is part of a dynamic product package.



Indicates that the selected product is a configured product.

Page Used to Work with Product Information on a Mobile Device

Page Name	Object Name	Navigation	Usage
Details	MOC_PROD_DET	CRM, Product Definition, Details	View product information.
Notes	MOC_PROD_DET	CRM, Product Definition, Notes	View notes for the product.
Attachments	MOC_PROD_DET	CRM, Product Definition, Attachments	View attachments for the product.
Product Groups	MOC_PROD_DET	CRM, Product Definition, Product Groups	View groups to which the product belongs.
Relationships	MOC_PROD_DET	CRM, Product Definition, Relationships	View any related products that are associated with the product.

Accessing Product Information

Access the Product Details component.

Details Notes Attachments Product Groups Relationships

Product ID: 100052

No Image Available

Description: CD-Rom CD-RW - UOM

Status: Active

Category:

Currency	List Price	UOM
US Dollar	\$9.99	Dozen
US Dollar	\$0.99	Each
US Dollar	\$99.99	gross

[Return to List](#)

Details page

The mobile version of the Product Definition component enables you to:

- View basic product information.
- View product notes and attachments.
You can click an attachment file name link and save it locally.
- View product groups and relationships, if available.

Click the related product link to transfer to the Details page for that product.

- Determine if the product is a package.
- Determine if the product is a configured product.

See Also

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

CHAPTER 8

Using PeopleSoft Enterprise Mobile Order Capture

This chapter provides an overview of transactions in PeopleSoft Enterprise Mobile Order Capture and discusses how to work with orders and quotes on a mobile device.

Understanding Transactions in PeopleSoft Enterprise Mobile Order Capture

PeopleSoft Enterprise Mobile Order Capture delivers much of the functionality of PeopleSoft Enterprise Order Capture to mobile devices. The functionality that is available to you may differ depending on the permissions that are set by your administrator.

PeopleSoft Enterprise Mobile Order Capture enables sales representatives to capture customer, product, and order or quote information in a disconnected environment. When a sales user subsequently connects to the network (on which PeopleSoft Order Capture is installed), data is synchronized and all disconnected information can be transferred between a mobile device and the PeopleSoft CRM database. For each installation of PeopleSoft Enterprise Mobile Order Capture, the application supports only one sales business unit, one Order Capture business unit, one product setID, and one Customer setID. Also, an installation of PeopleSoft Enterprise Mobile Order Capture on a mobile device does not have to include Mobile Sales. When a user implements both applications, they must both point to the same setID for customer and product, although business units may be different.

Note. PeopleSoft Enterprise Mobile Order Capture is not available on personal digital assistant (PDA) devices.

This table lists the component that is available in Mobile Order Capture and describes its functionality:

Mobile Object	Actions Available
Order or Quote	<ul style="list-style-type: none">• Add, cancel, submit, and view orders and quotes.• Add, edit, and delete line details.• View and update shipping information. Shipping information appears after a customer (company or consumer) is selected. The shipping address is the company's primary address.• View and update billing information. Billing information appears after a customer (company or consumer) is selected. The billing address is the company's primary address.• View hold items.• Add and view notes and attachments.• View and access related objects.

Working with Orders and Quotes on a Mobile Device

This section discusses how to manage orders and quotes.

Pages Used to Work with Orders and Quotes on a Mobile Device

Page Name	Object Name	Navigation	Usage
Entry Form	MOC_FORM	<ul style="list-style-type: none"> Add Order/Quote Click the Add button to add an order or quote. Search Orders and Quotes, Entry Form 	Add a new order or quote, or view an existing order or quote on the mobile device.
Line Details	MOC_FORM	<ul style="list-style-type: none"> Add Order/Quote, Line Details Search Orders and Quotes, Line Details 	Add, remove, and update line items for the order or quote. View products that are selected for line items.
Shipping	MOC_FORM	<ul style="list-style-type: none"> Add Order/Quote, Shipping Search Orders and Quotes, Shipping 	Access shipping information for the selected company.
Holds	MOC_FORM	<ul style="list-style-type: none"> Add Order/Quote, Holds Search Orders and Quotes, Holds 	View product items that are on hold.
Notes	MOC_FORM	<ul style="list-style-type: none"> Add Order/Quote, Notes Search Orders and Quotes, Notes 	Add and view notes.
Related Objects	MOC_FORM	<ul style="list-style-type: none"> Add Order/Quote, Related Objects Search Orders and Quotes, Related Objects 	Access objects (such as sales leads) that are related to the order or quote.

Managing Orders and Quotes

Access the Entry Form page.

Entry Form page

Note. The toolbar buttons that appear on the Entry Form page are standard PeopleSoft Enterprise Order Capture buttons. Personalization of the toolbar buttons is not supported in PeopleSoft Enterprise Mobile Order Capture. Links that appear above the toolbar represent different sections on the entry form.

See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Managing Orders and Quotes,” Understanding Order Capture.

The Order or Quote component allows users to:

- Add, edit, and cancel orders and quotes.

When a user creates a new order, the default order or quote ID is initially <user id><capture type><sequence number>. For example, if the user ID is “MOCREP” and this is the user’s first order, the order ID will be set to “MOCREPSO001.” If this is the user’s second quote, the quote ID will be “MOCREPQUO002.”

Note. The order ID is overwritten by the server upon synchronization. For example, if you have created a mobile order with the ID of “MOCREPSO001,” it will change to a number. The format is determined by the Capture Type workbench when you next synchronize.

- Submit orders and quotes.
- View basic order and quote information.
- Add, view, and remove line details.

When users view a line item in detail, it indicates the list price and total price for the line. If the order has been synchronized, the price is the final price that includes all surcharges or discounts as set up in pricing. Special pricing is applied when the order is synchronized with the server.

- View shipping information.

Users can order configured products and dynamic packages, but cannot configure them on the mobile device. If the user orders one or more of these products and submits the order, it will be placed on hold at synchronization time. The Customer Service Representative must configure these products from within PeopleSoft Enterprise Order Capture. Implementers can exclude these products from being passed to the mobile device by enforcing the appropriate dataset rules.

Note. Mobile orders are restricted to a single shipment. However, if this order or quote was created in PeopleSoft Enterprise Order Capture and is shipping to multiple locations, all of those locations will appear here.

- View billing information.
- View order holds.

In most cases, holds can only be resolved on the server. However, they can be lifted if the issues that caused the holds can be corrected on the mobile application. For example, if the order is held because an invalid Bill To customer was specified on the order (or no Bill To customer was specified at all), the user can change the Bill To customer and perform a synchronization. The hold is then lifted.

- Add notes and attachments.
- View objects that are related to the orders or quotes.

Third-Party and Miscellaneous Calculations

The following third-party and miscellaneous charges may be applied to the order during synchronization. After synchronization, these charges are reflected on the order on the mobile application:

- Pricing discounts, surcharges, or both.
- Freight.
- Tax.
- Value-added tax.
- Product giveaways.

See Also

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

CHAPTER 9

Using PeopleSoft Enterprise Mobile Sales

This chapter provides an overview of transactions in PeopleSoft Enterprise Mobile Sales and discusses how to:

- Work with the Sales homepage on a mobile device.
- Work with leads and opportunities on a mobile device.
- Work with forecasts on a mobile device.

Understanding Transactions in PeopleSoft Enterprise Mobile Sales

PeopleSoft Enterprise Mobile Sales delivers much of the functionality of PeopleSoft Enterprise Sales to the laptop. The functionality that is available to you may differ depending on the permissions that are set by your administrator.

The dataset rules that you define for the user ID and role determine the set of data that is loaded onto the mobile device. Although business units used by PeopleSoft Enterprise Mobile Sales and PeopleSoft Enterprise Mobile Order Capture can be different, their business units must be related to the same setID for customers and products. The setID for customers and products can be different.

Note. PeopleSoft Enterprise Mobile Sales is not available on personal digital assistant (PDA) devices.

This table lists the components available in PeopleSoft Enterprise Mobile Sales and describes the functionality of each component:

Mobile Object	Actions Available
Sales Homepage	View summaries and edit accounts, leads, opportunities, forecasts, tasks, orders, and quotes.

Mobile Object	Actions Available
Lead	<ul style="list-style-type: none"> • Create new leads. • View and update existing leads: <ul style="list-style-type: none"> - Edit customer and lead details. - Add and edit contacts. - Assign sales team members and partners. - Associate a campaign and potential competitors. - Add buying criteria and products. <p>The component provides a range of products for selection based on dataset rules.</p> <ul style="list-style-type: none"> - Create orders and quotes after products are added. (This feature is available with the installation of PeopleSoft Enterprise Mobile Order Capture.) - Add and edit call reports, tasks, and notes. • Convert leads to opportunities. • Clone leads. • Turn back leads.
Opportunity	<ul style="list-style-type: none"> • Create new opportunities. • View and update existing opportunities: <ul style="list-style-type: none"> - Edit customer and opportunity details. - Add and edit contacts. - Assign sales team members and partners. - Associate a campaign and potential competitors. - Add buying criteria and products. - Add forecasts to opportunities. <ul style="list-style-type: none"> - Create orders and quotes after products are added. (This feature is available with the installation of PeopleSoft Enterprise Mobile Order Capture.) - Add and edit call reports, tasks, and notes.
Forecast	<ul style="list-style-type: none"> • View revenue forecasts. • Update forecasts. • Submit forecasts. • Reforecast. • Display forecast data in table and in chart. • Export forecast data.

Working with the Sales Homepage on a Mobile Device

This section discusses how to:

- Use the Sales homepage.
- Personalize the Sales homepage.

Pages Used to Work with the Sales Homepage

Page Name	Object Name	Navigation	Usage
Sales Homepage	RSFM_SALES_VIEWER	Sales Homepage	View summarized information about selected sales objects.
My Sales Homepage Preferences	RSFM_SV_PREFS	Click the Personalize this Page button on the Sales Homepage.	Personalize the Sales Homepage page.

Using the Sales Homepage

Access the Sales Homepage page.

Sales Homepage

My Recent Forecast
Forecast: [2004 Q2](#) Time Frame: 2004 BY MONTH-2004 Total: 5,000.00 USD

Peterson, Frank T \$5,000.00

My Accounts Find | View All | First < 1-1 of 1 > Last

Name	Owner Name	Parent Name	Account Plans
Altima Corp.	Edward Allen	Altima Corp.	Account Plans

My Leads Find | View All | First < 1-5 of 5 > Last

Lead	Contact	Phone	Status	Rating	Est. Revenue
Computers for IMC	Gomez, Selma	949/226-9881	Open	Hot	15,000.000
Hardware upgrade for MD Engineering	Bardini, Agnes	907/558-6987	Open	Warm	25,000.000
Computers for IMC, Cloned# 1	Gomez, Selma	949/226-9881	Open	Hot	
Computers for IMC, Cloned# 2	Gomez, Selma	949/226-9881	Open	Hot	
Hardware upgrade for MD Engineering, Cloned# 1	Bardini, Agnes	907/558-6987	Open	Warm	

My Opportunities Find | View All | First < 1-3 of 3 > Last

Opportunity	Contact	Phone	Status	Est. Close Date	Est. Revenue
Valley Health Hardware	Davis, Bud	925/410-5554	Open	06/13/2002	200,000.000
Global Payment hardware	Depp, Michael	925/847-3322	Open	06/19/2002	200,000.000
Peterson, Frank T			Open		

Sales Homepage page (1 of 2)

My Forecasts						Find View All [Grid Icon]	First < 1-1 of 1 > Last
Forecast	Time Frame					Total	
2004_Q2	2004 BY MONTH-2004					5,000,000	

My Tasks							Find View All [Grid Icon]	First < 1-5 of 5 > Last
Subject	Task Type	Status	Start Date	Start Time	Owner		View Task	
Task for CI tester	Meeting	Open	05/14/2004	6:45 PM	Peterson, Frank T		View Task	
TEST DEFAULT DATE	To Do	Completed	05/14/2004	1:00 AM	Moss, Steve Manager		View Task	
TEST NO DATE DEFAULT	To Do	Open	05/14/2004	8:15 PM	Peterson, Frank T		View Task	
TEST TASK DEF	To Do	Open	05/14/2004	1:00 AM	Peterson, Frank T		View Task	
TEST TASK DEF	To Do	Open	05/14/2004	1:00 AM	Peterson, Frank T		View Task	

My Quotes & Orders						Find View All [Grid Icon]	First < 0-0 of 0 > Last
Order ID	Status	Date Created	Customer	Contact	Type		
Save							

Sales Homepage page (2 of 2)

The Sales Homepage page provides sales representatives a summarized view of their accounts, leads, opportunities, forecasts, tasks, orders, and quotes. Sales representatives can click links or buttons to access corresponding objects for more details.

Personalizing the Sales Homepage

Access the My Sales Homepage Preferences page.

My Sales Homepage Preferences			
My Accounts			
<input checked="" type="checkbox"/> My Accounts			
Num. of Accounts to Display:	<input type="text" value="5"/>	Sort By:	<input type="text"/>
		Sort Order:	<input type="text" value="Ascending"/>
My Recent Forecast Graph			
<input checked="" type="checkbox"/> Forecast Graph			
Subtotal by 1:	<input type="text" value="Adjusted By"/>		
Subtotal by 2:	<input type="text"/>		
My Leads			
<input checked="" type="checkbox"/> My Leads			
Num. of Leads to Display:	<input type="text" value="5"/>	Sort By:	<input type="text"/>
		Sort Order:	<input type="text" value="Ascending"/>
My Opportunities			
<input checked="" type="checkbox"/> My Opportunities			
Num. of Oppys. to Display:	<input type="text" value="5"/>	Sort By:	<input type="text"/>
		Sort Order:	<input type="text" value="Ascending"/>

My Sales Homepage Preferences page (1 of 2)

My Forecasts

☒ My Forecasts

Num. of Forecasts to Display:

Sort By: Sort Order:

☐ Display Graph with Table

My Tasks

☒ My Tasks

Num. of Tasks to Display:

Sort By: Sort Order:

My Quotes & Orders

☒ My Quotes

Num. of Quotes to Display:

Sort By: Sort Order:

[Return to My Sales Homepage](#)

[Save](#)

My Sales Homepage Preferences page (2 of 2)

My Accounts

My Accounts

Select to display the My Accounts section on the Sales Homepage page.

Num. of Accounts to Display (number of accounts to display)

Indicate the maximum number of accounts to display on the Sales Homepage page.

Sort By

Select the column by which results are sorted. Values are *Account Name*, *Account Owner*, and *Parent Name*.

Sort Order

Select *ascending* or *descending* sort order for results.

My Recent Forecast Graph

Forecast Graph

Select to display a forecast graph in the My Recent Forecast section on the Sales Homepage page.

Subtotal by 1 and Subtotal by 2

Enter a value for Subtotal by 1 to display a graph.

Selecting an object for Subtotal by 2 enables you to view more detailed information about a forecast. For example, the overall forecast might be for March, 2005. To display a graph that shows confidence level groups by region, you would select *Confidence %* for Subtotal by 1 and *Region* for Subtotal by 2.

My Leads

My Leads

Select to display the My Leads section with user's leads on the Sales Homepage page.

Num. of Leads to Display (number of leads to display)

Enter the maximum number of leads to display on the Sales Homepage page.

Sort By	Select the column by which results are sorted.
Sort Order	Select <i>ascending</i> or <i>descending</i> sort order for results.

My Opportunities

My Opportunities	Select to display the My Opportunities section with the users's opportunities on the Sales homepage.
Num. of Oppys. to Display (number of opportunities to display)	Indicate the maximum number of opportunities to display on the Sales Homepage page.
Sort By	Select the column by which results are sorted.
Sort Order	Select <i>ascending</i> or <i>descending</i> sort order for results.

My Forecasts

My Forecasts	Select to display the My Forecasts section with user's forecasts on the Sales Homepage page.
Num. of Forecasts to Display (number of forecasts to display)	Enter the maximum number of forecasts to display on the Sales Homepage page.
Sort By	Select the column by which results are sorted.
Sort Order	Select <i>ascending</i> or <i>descending</i> sort order for results.
Display Graph with Table	Select to display the forecast graph on the page with the subtotals table. Clear the check box to display the graph on a separate tab.

My Tasks

My Tasks	Select to display the My Tasks section with user's tasks on the Sales Homepage page.
Num. of Tasks to Display (number of tasks to display)	Enter the maximum number of tasks to display on the Sales Homepage page.
Sort By	Select the column by which results are sorted.
Sort Order	Select <i>ascending</i> or <i>descending</i> sort order for results.

My Quotes & Orders

My Quotes	Select to display the My Quotes & Orders section with the user's quotes and orders on the Sales Homepage page.
Num. of Quotes to Display (number of quotes to display)	Enter the maximum number of quotes to display on the Sales Homepage page.
Sort By	Select the column by which results are sorted.
Sort Order	Select <i>ascending</i> or <i>descending</i> sort order for results.

Working with Leads and Opportunities on a Mobile Device

This section discusses how to:

- Manage leads.
- Add contacts to leads and opportunities.
- Convert leads to opportunities.
- Manage opportunities.
- Clone leads and opportunities.
- Close leads.
- Close opportunities.

The mobile device version of leads and opportunities is different from the server version in that:

- The user interface on the mobile device is slightly different.
Users access contacts, products, tasks, and notes from tabs rather than from drop-down list boxes or expand-all options.
- History and attributes are not available on the mobile device.

Pages Used to Work with Leads and Opportunities on a Mobile Device

Page Name	Object Name	Navigation	Usage
Discover (Lead)	RSFM_LEAD	CRM, Leads, Discover	View and manage leads.
Assign (Lead)	RSFM_LEAD	CRM, Leads, Assign	Assign sales team members and partners, and edit details for the sales representative.
Qualify (Lead)	RSFM_LEAD	CRM, Leads, Qualify	Associate a campaign with a lead and specify potential competitors (if present).
Propose (Lead)	RSFM_LEAD	CRM, Leads, Propose	Add buying criteria and products to the lead. Create new quotes and orders to the lead.
Call Reports (Lead)	RSFM_LEAD	CRM, Leads, Call Reports	Add and edit call reports that are created for the lead.
Tasks (Lead)	RSFM_LEAD	CRM, Leads, Tasks	Add and edit tasks that are created for the lead.
Notes (Lead)	RSFM_LEAD	CRM, Leads, Notes	Add and edit notes and attachments.
Convert Lead To Opportunity	RSFM_CONVERTLEAD	Click the Convert button on the toolbar.	Select options to convert a lead to an opportunity.

Page Name	Object Name	Navigation	Usage
Discover (Opportunity)	RSFM_OPPORTUNITY	CRM, Opportunities, Discover	View and manage opportunities.
Assign (Opportunity)	RSFM_OPPORTUNITY	CRM, Opportunities, Assign	Assign sales team members and partners, and edit details for the sales representative.
Qualify (Opportunity)	RSFM_OPPORTUNITY	CRM, Opportunities, Qualify	Associate a campaign with an opportunity and specify potential competitors (if present).
Propose (Opportunity)	RSFM_OPPORTUNITY	CRM, Opportunities, Propose	Add buying criteria, products, and forecasts to the opportunity. Create new quotes and orders to the opportunity.
Call Reports (Opportunity)	RSFM_OPPORTUNITY	CRM, Opportunities, Call Reports	Add and edit call reports that are created for the opportunity.
Tasks (Opportunity)	RSFM_OPPORTUNITY	CRM, Opportunities, Tasks	Add and edit tasks that are created for the opportunity.
Notes (Opportunity)	RSFM_OPPORTUNITY	CRM, Opportunities, Notes	Add and edit notes and attachments.
Contacts Detail	RSFM_LEAD, RSFM_OPPORTUNITY	Click the Add button in the Contacts section of the lead or opportunity.	Create new contacts or select existing contacts to associate with the lead or opportunity.
Clone Lead	RSFM_CLONELEAD	Click the Clone button on the toolbar.	Select items to copy from the original lead to a clone.
Clone Opportunity	RSFM_DT_OPP_CLONE	Click the Clone button on the toolbar of the opportunity.	Select items to copy from the original opportunity to a clone.

Managing Leads

Access the Discover page for leads.

Discover Assign Qualify Propose Call Reports Tasks Notes

Save Add Lead Clone Convert Search 360-Degree View

Customer: Chad Rawlings **Lead:** Chad Rawlings Lead
Primary Contact: Rawlings, Chad **Telephone:**
Lead Status: New **Lead Rating:** Hot

Customer

Customer Type: Company ☒ **Select Existing Company**
Company: Chad Rawlings **Address:** **Site:** **Address:**
Add Address Add Address

Lead Details

***Description:** Chad Rawlings Lead **Business Unit:** US300
Sales Rep: Peterson, Frank T
Revenue: 150,000.00 **Currency:** US Dollar
Status: New **Rating:** Hot **Priority:** 2-Two

Contacts

Primary	First Name	Last Name	Details	Preferred Communication	Work Phone	Ext	Email Address
<input checked="" type="checkbox"/>	Chad	Rawlings	Details	Email only			crawlings@templeelec_psft.com

Add

Assign Team Add Product Create Quote Add Task Add Note

Save Return to List

Discover page (Lead)

The default business unit for the mobile role determines the business unit that appears on the laptop. As a result, you can only enter and view leads in the default business unit.

If prospects are enabled on the Installations page on the server, the Discover page displays the Select Existing Company or the Select Existing Consumer check box based on the selected customer type. If the check box is selected, the user can only select from an existing Company or Consumer list. If the check box is cleared, the user can enter free-form text as the company name and the consumer's first and last names. If the free-form text does not match an existing Customer Data Model (CDM) customer, the company or consumer is stored as a prospect (that is, not saved to the CDM).

Note. When you clone a lead on the server, not all of the cloned data is downloaded to the laptop.

When you synchronize the data back to the server, any data that was previously not downloaded to the mobile device will be reattached to the old lead.

See Also

PeopleSoft Enterprise Sales 9 PeopleBook, “Managing Leads and Opportunities”

PeopleSoft Enterprise Sales 9 PeopleBook, “Creating Sales Leads and Opportunities”

PeopleSoft Enterprise Sales 9 PeopleBook, “Assigning a Lead or Opportunity”

PeopleSoft Enterprise Sales 9 PeopleBook, “Qualifying a Lead or Opportunity”

PeopleSoft Enterprise Sales 9 PeopleBook, “Creating a Proposal for a Lead or Opportunity”

PeopleSoft Enterprise Sales 9 PeopleBook, “Creating Sales Tasks and Adding Notes for a Lead or Opportunity”

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, “Defining Control Values for Business Objects”

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

Adding Contacts to Leads and Opportunities

Access the Contacts Detail page.

Contacts Detail

Customer: [Cady Montgomery](#)

☐ **Primary**

First Name:

Last Name:

Pref Comm:

Work Phone: **Ext:**

Country Code:

Cell Phone:

Fax Number:

Home Phone:

Email Address:

Find | View All | First Last

First Name	Last Name	Country Code	Phone	Ext	Select
Fred	Albright		651/785-6687		<input type="button" value="Select"/>
Tristan	Garrett		719/554-8632		<input type="button" value="Select"/>

[Go Back](#)

Contacts Detail page

Users can add contacts to leads and opportunities by either selecting contacts that exist on the mobile device or creating new ones using the fields provided on this page. The system hides these fields if the Add Prospect field is not selected on the Installation page.

New contacts created here are stored as business card information in their leads and opportunities and are not visible outside of their transactions. On the Discover page, clicking the Contacts Detail button brings users to the Contacts Detail page, where the business card information appears.

Users can also add existing contacts to leads and opportunities. The list shows all contacts that are downloaded to the mobile device. If a valid company (a company that is stored in the CDM) is entered for the lead or opportunity, the list is refined to only contacts that are associated with that company.

Note. Business card contacts are stored as persons in CDM upon synchronization when either of these situations occurs: a lead is converted to an opportunity or an opportunity is set to the *Closed - Won* status.

See Also

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

Converting Leads to Opportunities

Access the Convert Lead To Opportunity page.

Convert Lead To Opportunity

Customer Name: Chad Rawlings
 Business Unit: US300

Lead: Chad Rawlings Lead

STEP 1: Link to Existing or Create a new Opportunity.
 You can link this lead to an existing opportunity (if any are displayed below) or create a new opportunity.

☒ Create a New Opportunity
 ☒ Transfer to Opportunity

Find | View All |

First 0-0 of 0 Last

Select	Opportunity
--------	-------------

STEP 2: Select Data to Copy.

☒ Contacts
 ☒ Sales Team
 ☒ Products
 ☒ Competition
 ☒ Partners
 ☒ Tasks
 ☒ Needs
 ☒ Quotes & Orders
 ☒ Notes and Attachments
 ☒ Call Reports

STEP 3: Complete Conversion.
 Press Ok to proceed with conversion of lead to opportunity. Click Cancel to cancel the conversion and go back to the lead.

OK Cancel

Save [Return to List](#)

Convert Lead To Opportunity page

Note. When converting a lead to an opportunity, if the lead is a prospect, a new CDM customer is created using the prospect's information (the prospect is *pushed* to CDM). The lead and the opportunity are linked to the customer, and a hyperlink appears to allow navigation to the newly created CDM customer. Note also that when converting a prospect lead to an opportunity, the customer name (for a company) or the first and last names (for a contact) must be present in order to push the prospect's information to CDM. If these are not present, the lead is converted to an opportunity but the information is not transferred to CDM.

STEP 1

Create New Opportunity	Select to convert the lead into a new opportunity.
Transfer to New Opportunity	Select to transfer to the opportunity when you click OK. When cleared, the system returns to the Leads page that you were on when you clicked the Convert button.

STEP 2

Select the data to carry over from the lead to the opportunity.

If you associate the lead with an existing opportunity, the system adds the selected information from the lead to the selected opportunity.

STEP 3

OK	Click to save the opportunity. To transfer directly to the new opportunity upon successful conversion, select the Transfer to Opportunity check box before clicking OK.
-----------	--

See Also

PeopleSoft Enterprise Sales 9 PeopleBook, “Creating Sales Leads and Opportunities”

Managing Opportunities

Access the Discover page.

Discover Assign Qualify Propose Call Reports Tasks Notes

Save Add Opportunity Clone Search 360-Degree View

Description: Cady Montgomery **Status:** Open
Customer: Cady Montgomery **Customer Value:**
Contact: Albright,Fred **Revenue:**

Customer

Customer Type: Company ☒ **Select Existing Company**

Company: Cady Montgomery
Address:
Site: Pittsburg
Address:

Opportunity

Description: Cady Montgomery **Business Unit:** US300
Sales Rep: Peterson, Frank T
Status: Open **Priority:** 2-Two
☐ **Forecast** **Forecast Type:**
Est. Revenue: **Currency:** US Dollar
Confidence %: 85 **Close Date:** 08/18/2006
Forecast Amount:
Model: Knowledge Enabled Sales
Stage: 02-Qualify Customer
Task: 03-Update Opportunity
%Close: 15

Contacts Find View All First 1 of 1 Last

Primary	First Name	Last Name	Details	Pref Comm	Work Phone	Ext	Email Address	Refresh
<input checked="" type="checkbox"/>	Fred	Albright	<input type="button" value="Details"/>	Call	651/785-6687	2834	falbright@cadymont.com	<input type="button" value="Refresh"/>

Discover page (Opportunity)

If prospects are enabled on the Installations page, the Discover page displays either the Select Existing Company or the Select Existing Consumer check box based on the selected customer type. If the check box is selected, the user can only select from an existing Company or Consumer list. If the check box is cleared, the user can enter free-form text as the company name or the consumer's first and last names. If the free-form text does not match an existing CDM customer, the company or consumer is stored as a prospect (that is, not saved to the CDM).

See Also

- PeopleSoft Enterprise Sales 9 PeopleBook, “Managing Leads and Opportunities”
- PeopleSoft Enterprise Sales 9 PeopleBook, “Creating Sales Leads and Opportunities”
- PeopleSoft Enterprise Sales 9 PeopleBook, “Assigning a Lead or Opportunity”
- PeopleSoft Enterprise Sales 9 PeopleBook, “Qualifying a Lead or Opportunity”
- PeopleSoft Enterprise Sales 9 PeopleBook, “Creating a Proposal for a Lead or Opportunity”
- PeopleSoft Enterprise Sales 9 PeopleBook, “Creating Sales Tasks and Adding Notes for a Lead or Opportunity”
- PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Setting Up General Options,” Setting Up General Options
- PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, “Defining Control Values for Business Objects”

Cloning Leads and Opportunities

Access the Clone Lead or Clone Opportunity page.

Clone Lead

Enter the name for the new Lead that will be created by the Cloning process. Select the check boxes to copy the related information as appropriate.

New Lead:

Number of Clones:

1

☒ Transfer to Cloned Lead

Select Items to Copy

☒ Contacts

☒ Sales Team

☒ Products

☒ Competition

☒ Partners

☒ Buying Criteria

☒ Notes & Attachments

OK

Cancel

Save

[Return to List](#)

Clone Lead page

New Lead or Opportunity Name	Enter a name or description for the new lead or opportunity that you want to create.
Number of Clones	Enter the number of copies that you want to make from the original lead or opportunity. The system will create that number of identical clones of the original and append the clone number to the lead description.
Transfer to Cloned Lead or Transfer to Cloned Opportunity	Select to transfer to the new cloned lead or opportunity when you click OK. If you do not select this check box, the system returns to the original lead or opportunity from which you were copying. If you are making more than one

cloned copy and you select this check box, the system takes you to the last cloned item. Each cloned item is available from the list pages for you to edit.

Select Items to Copy

Select the data that you want to copy from the original to the clone.

Closing Leads

To close a lead, access the Discover page for leads and enter the appropriate status: *Closed - Lost*, *Closed - Won*, or *Closed - Duplicate*.

You may also close a lead by setting the status to *Turnback*. When this status is selected, a Reason field appears on the page. You must select a reason for turning back the lead before saving the page.

Closing Opportunities

To close an opportunity, access the Discover page for opportunities and enter the appropriate status: *Closed - Won* or *Closed - Lost*.

If the opportunity is *Closed - Lost*, you must specify the fallout reason and enter a comment and other data about the loss before saving the page. Also, you must review the forecast items and either select or clear the Forecast check box to keep them in or remove them from, respectively, the forecast. You must enter a revenue to close the opportunity.

Working with Forecasts on a Mobile Device

This section discusses how to work with forecasts on a mobile device.

Pages Used to Work with Forecasts on a Mobile Device

Page Name	Object Name	Navigation	Usage
Forecast	RSFM_REV_ENTER	CRM, Forecasts, Forecast	Add and adjust revenue forecasts.
Subtotals	RSFM_REV_ENTER	CRM, Forecasts, Subtotals	View forecast subtotals.
Chart	RSFM_REV_ENTER	CRM, Forecasts, Chart	Specify how to display the forecast chart.
Export Subtotals	RSFM_REV_ENTER	CRM, Forecasts, Export Subtotals	Display the format in which forecast totals are exported. Use the Export button to export the forecast information on a spreadsheet.

Working with Forecasts

Access the Forecast page.

Forecast		Subtotals		Chart		Export Subtotals	
Name: Frank Peterson				Forecast: 2006 JAN			
Created: 04/11/2006		Time Frame: 2006 BY QUARTER-2006					
Total: 200,000.000		Begin Date: 01/01/2006					
Date Locked:		End Date: 12/31/2006					
Reforecast		Forecast Type: Revenue Forecast					
Forecast User				Find View All		First 1-1 of 1 Last	
Sales Person	Date	Currency	Submit				
Peterson, Frank T	04/11/2006	USD	<input type="checkbox"/>				
Forecast Details				Find View All		First 1-1 of 1 Last	
Opportunity	Forecast Type	Confidence %	Close Date	Description	Current Rev	View Revenue	
	Adj	80	04/07/2006	US Dollar	200,000.00	200,000.00	
Add							
Save Return to List							

Forecast page

Use the Forecast component to:

- Add and adjust revenue forecasts.
- Regenerate forecasts.
- Add and edit forecast details.
- View forecast totals.
- Export forecast totals to spreadsheets.
- Specify how to display forecast charts.

On the server, sales representatives cannot change forecast data once the Submit check box is selected and the forecast is saved. They can, however, clear the check box and change the data in the mobile application, as long as synchronization hasn't occurred.

See Also

PeopleSoft Enterprise Sales 9 PeopleBook, "Understanding Sales Forecasts"

CHAPTER 10

Using PeopleSoft Enterprise Mobile Account Planning

This chapter provides an overview of transactions in PeopleSoft Enterprise Mobile Account Planning and discusses how to work with accounts on a mobile device.

Note. PeopleSoft Enterprise Mobile Account Planning is not available on personal digital assistant (PDA) devices.

Understanding Transactions in PeopleSoft Enterprise Mobile Account Planning

PeopleSoft Enterprise Mobile Account Planning enables sales professionals to build and manage highly integrated relationships, including the sale of products and services, with an organization. The application delivers much of the functionality of PeopleSoft Enterprise Account Planning to mobile devices. The functionality that is available to you may differ depending on the permissions that are set by the administrator.

The dataset rules that are defined for the user ID and role determine the set of data loaded onto the mobile device.

This table lists the components available in PeopleSoft Enterprise Mobile Account Planning and describes the functionality of each component:

Object	Actions Available
Account Planning Details	View detailed account plans with read-only access.
Account Team	View team members at both the account level and the account plan level.

Working with Accounts on a Mobile Device

This section discusses how to:

- View account plans.
- View account teams.

Pages Used to Work with Accounts on a Mobile Device

Page Name	Object Name	Navigation	Usage
Account Planning Details	RSPM_PLANNING	<ul style="list-style-type: none"> Company, Account Plans, Account Planning Details Person, Account Plans, Account Planning Details Click the Account Plan button on the Sales Homepage. 	View each account plan in detail with read-only access.
Account Team	RDM_COMPANY_2, RDM_PERSON	<ul style="list-style-type: none"> Company, Account Team Person, Account Team 	View each person or company associated with an account team with read-only access.

Viewing Account Plans

Access the Account Planning Details page.

Account Planning Details | Tasks | Notes

Name: Arnold Ice Company **Plan**
Name: Targeted Accounts Sales Plan

Plan Type: SALES
Status: Active
Description: Strategic account planning for internal enterprise sales representatives for driving our g
Currency: USD
Start Date: 01/01/2004
End Date: 12/31/2004
Status: Draft

Objectives Find | View All | First 1-4 of 4 Last

Objective
Cross Sell and Up Sell
Increase Customer Satisfaction
Increase Revenue
Qualify Prospects

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

Name	Target Val	Prorated	Attainment	Variance %
Increase Opportunity Revenue	150,000.00			
Increase Sales Leads	25.00			

Plan Team Members Find | View All | First 1-2 of 2 Last

Person BO_ID	Owner
10,033,757,862,167,428,867,273,178	Yes
281	No

Account Planning Details page

The Account Planning component:

- Displays account plan details and enables users to view multiple account plans for a company simultaneously.
- Provides the user with view access to account team members at the account level.
- Provides the user with view access to account plans for a consumer.
- Provides the user with view access to plan details, objectives, and goals.

- Enables the user to view and add tasks with a start date within the account plan's start and end dates.
- Enables the user to view and add notes to an account plan.

Viewing Account Teams

Access the Account Team page.

Account Team		Find	View All	Grid	First	1-3 of 3	Last
Name							
	Carol Gomez						
	Edward Allen						
	Frank Peterson						

Save

Account Team page

The Account Team page provides users with view access of account team members for a company or consumer.

See Also

PeopleSoft Enterprise Strategic Account Planning 9 PeopleBook

CHAPTER 11

Using PeopleSoft Enterprise Mobile FieldService

This chapter provides an overview of transactions in PeopleSoft Enterprise Mobile FieldService and discusses how to:

- Work with service orders on a mobile device.
- View service inventory on a mobile device.

Note. The pages shown in the following sections represent pages viewed on a laptop. Pages viewed on a personal digital assistant (PDA) have a different layout and show fewer fields because of limited space.

Understanding Transactions in Mobile FieldService

PeopleSoft Enterprise Mobile FieldService delivers much of the functionality of PeopleSoft Enterprise FieldService to a laptop. The functionality that is available to you may differ depending on the permissions that are set by your administrator.

This table lists the components available in PeopleSoft Enterprise Mobile FieldService and describes the functionality of each component:

Object	Actions Available on Mobile Devices
Service Order Detail	<ul style="list-style-type: none">• Add new service orders.• View and edit service order details.• Merge with an existing service order.• Copy existing service orders.
Activity Details	<ul style="list-style-type: none">• View and update service order activity details.• View technician assignment.
Installed Products	View installed product details and any associated cases and service orders.
Required Material	View a list of materials required to complete the service order.
Time Material Expense	View and add time, expense, and material information.
My Service Inventory	View item ID, description, quantity, and unit of measure for items on technicians' trucks.

Working with Service Orders on a Mobile Device

This section discusses how to:

- Work with service orders.
- Work with service order activities.
- View required material.
- Manage time, materials and expenses.
- View installed product details.

PeopleSoft Enterprise Mobile FieldService provides filtering, sorting, and searching capabilities for service order selection on the mobile device. Dataset rules determine the service orders that are delivered to the mobile device during synchronization.

Note. Only service orders that are assigned to the technician using the mobile device are downloaded during synchronization. Closed service orders are excluded from the synchronization process.

Pages Used to Manage Service Orders on a Mobile Device

Page Name	Object Name	Navigation	Usage
Service Order Detail	RFM_SO_TECH_2	CRM, My Service Orders, Service Order Detail	View, edit, or add service orders.
Activity Details	RFM_SO_TECH_2	Click the Activity Details button for the activity you wish to view.	Enter detailed information about a service order activity.
Required Material	RFM_SO_TECH_2	CRM, My Service Orders, Required Material	View a list of materials required to complete the service order.
Time Material Expense	RFM_SO_TECH_2	CRM, My Service Orders, Time Material Expense	Record time, material, and expense information.
Installed Products	RFM_INST_PRODUCT	CRM, My Service Orders Click the Installed Products button.	View the service order history for an installed product, including materials that were used or removed.

Working with Service Orders

Access the Service Order Detail page.

Service Order Detail | Required Material | Time Material Expense | Notes Summary

Service Order ID: 0000000052

Save | My Service Orders | Add Service Order | Copy Service Order

Company: Chad Rawlings
Contact Name: Chad Rawlings
 Search Contact

Site:

Address:

Phone: 504/654-4638(4221) **Alt. Phone:**

Service Details

Service ID: APP0000006 **Service:** Repair Air Conditioner
Problem:

☐ **Billable?**
Status: Open **Priority:** High

Product ID: SR1001 **Product:** 6600 BTU Room Air (Light Beige)
Installed Product ID: INS0000048

Serial Number: SRSR1001 01

Activity Details Find | View All | First 1-1 of 1 Last

Step	Activity Name	Status	Planned Start Date	Start Time	Planned End Date	End Time	Billable?	Estimated Duration
	<input type="text"/>	Assigned	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	0 min.

Add

Save Return to List

Service Order Detail page

Note. For service orders that normally require management approval, a technician can create a new service order on his or her mobile device. The technician, however, cannot change the status of the service order to *Complete* or *Close* on the mobile device and cannot upload it to the server, where it would appear as *Approved* by the technician. The system displays an error message to the user if they attempt to change the status to *Complete* or *Close*.

The Service Order component allows users to:

- Add, edit, and clone service orders.

If a dispatcher or agent creates a service order on the server and wants a technician to work on it but the technician has not synchronized with the server and cannot see the new service order, the technician can create a new service order on the mobile device by specifying the service order ID that was given by the dispatcher as the merge service order ID. Upon synchronization, the data that was entered on the mobile service order will be merged with the original service order.

- View service order details and associated activities.
- Add, view, and update time, expense, and material entries.
- View materials that are required to complete the service order.
- View installed product details.

Access to installed products is denied if the service order is associated with an invalid installed product record.

- Add and view notes.

See Also

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


Working with Service Order Activities

Access the Activity Details page.


Activity Details

Service Order ID: [0000000052](#)


Step:

Activity Name: 

Status:

Planned Start Date: 


Start Time:

Planned End Date: 

End Time:

☐ **Billable?**

Estimated Duration: 0 min.

Assignments Find | View All |  First Last

Provider Group Name	Group Member Name	Lead
Appliances Eastern	David Perry	<input checked="" type="checkbox"/>

[Return to List](#) [Go Back](#)

Activity Details page

The Activity Details page allows users to:

- Edit service order activity details.
- View a technician's assignment.

See Also


PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Creating and Managing Service Orders,”
Entering Information Related to Specific Activity Lines

Viewing Required Material

Access the Required Material page.

Service Order Detail **Required Material** **Time Material Expense** **Notes Summary**

Service Order ID: 0000000052

Required Material Find | View All |  First Last

Item ID	Description	Quantity Needed	Quantity in Truck	Quantity Ordered	Quantity Received	UOM
10009	Air Cond, Compressor			1.0000		EA
10010	Air Cond, Fan			2.0000		EA

[Return to List](#)

Required Material page

This page lists materials that are required to complete the service order.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Ordering and Receiving Materials,” Understanding Material Usage and Removal

Managing Time, Materials, and Expenses

Access the Time Material Expense page.

Service Order ID: SVC0300008

Time									
	Time Type	Activity Name	Start Date	Start Time	End Date	End Time	Billable?	Duration	Delete
	Activity	1 - Check Compressor	05/19/2004	8:00 AM	05/19/2004	8:03 AM	<input checked="" type="checkbox"/>		Delete
	Activity	2 - Check Heat Exchanger	05/19/2004	8:04 AM	05/19/2004	8:07 AM	<input checked="" type="checkbox"/>		Delete
	Activity	3 - Clean Outside Hot and Insi	05/19/2004	8:08 AM	05/19/2004	8:14 AM	<input checked="" type="checkbox"/>		Delete
	Activity	4 - Clean Ducts and Pipes	05/19/2004	8:15 AM	05/19/2004	8:21 AM	<input checked="" type="checkbox"/>		Delete
	Activity	5 - Check Fan	05/19/2004	8:22 AM	05/19/2004	8:25 AM	<input checked="" type="checkbox"/>		Delete
	Activity	6 - Preventive Maintenance of	05/19/2004	8:26 AM	05/19/2004	8:32 AM	<input checked="" type="checkbox"/>		Delete

[Add](#)

[Copy Planned Times](#)

Material								
	Action	Activity Name	Item ID	Quantity	Serial ID	Lot ID	Billable?	Delete
	Used	6 - Preventive Maintenance of	10011	1.0000			<input checked="" type="checkbox"/>	Delete

[Add](#)

Expense							
	Transaction Date	Expense Type	Amount	Currency	Billable?	Description	Delete
	05/21/2004	Gas	15.00	USD	<input checked="" type="checkbox"/>	Gas	Delete

[Add](#)

[Save](#) [Return to List](#)

Time Material Expense page

The Time Material Expense page allows users to:

- Add, edit, and remove time entries.
- Clone time entries as the basis for additional time reporting to minimize data entry tasks.
- Add, edit, and remove material entries.

If users select *used* as the action when recording material usage, the failure code field is not available for edit.

- Add, edit, and remove expense entries.

See Also

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

Viewing Installed Product Details

Access the Installed Products page.

Installed Products							
Installed Product ID: INS0000048							
Serial Number: SRSR1001 01 Item ID: SR1001 6600 BTU R UOM: EA Product ID: SR1001 Product: 6600 BTU Room Air (Light Beige) Site:							
Associated Cases Find View All First 0-0 of 0 Last							
Case	Summary	Status	Date Created	Created By	Date Closed		
Associated Service Orders Find View All First 1-2 of 2 Last							
Service Order	Service Description	Status	Date Created	Created By	Date Serviced	Provider Group Name	Group Member Name
0000000052	Repair Air Conditioner	Open	2001/06/02	SAMPLE		Appliances Eastern	David Perry
0000000059	Repair Air Conditioner	Open	2001/06/02	SAMPLE		Appliances Western	Alicia Lewis

Installed Products page

The Installed Products page:

- Displays installed product detail information.
- Displays a summary of cases and service orders that are associated with the selected installed product.

See Also

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

Viewing Service Inventory on a Mobile Device



This section discusses how to view service inventory.

Page Used to View Service Inventory on a Mobile Device

Page Name	Object Name	Navigation	Usage
My Service Inventory	RFM_TRUCK_INQ	My Service Inventory	View good and defective inventory on a technician's truck.

Viewing Service Inventory

Access the My Service Inventory page.

My Service Inventory			
Good Stock		Find View All 	First <input type="text" value="0-0 of 0"/> Last
Item	Description	Base Quantity	UOM
Defective Stock		Find View All 	First <input type="text" value="0-0 of 0"/> Last
Item	Description	Base Quantity	UOM

My Service Inventory page

The My Service Inventory page:

- Displays good and defective inventory items on a technician's truck.
- Displays product details.

See Also

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

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	<p>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.</p> <p>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.</p> <p>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.</p>
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	<p>Data elements, at their simplest level, define a subset of data and the rules by which to group them.</p> <p>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.</p>
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	<p>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.</p> <p>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.</p>
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 rollout 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	<p>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.</p> <p>See also <i>population</i> and <i>cohort</i>.</p>
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	<p>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.</p> <p>In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.</p>
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	Metastings are special expressions included in SQL string literals. The metastings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single

	transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.
PeopleCode event	See <i>event</i> .
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates

	a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product	A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.
product line	The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log	In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	<p>In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.</p> <p>In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.</p>
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
speed key	See <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.

system function	In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	<p>The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).</p> <p>When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).</p>
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
third party	A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft Enterprise General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Enterprise Projects.

trace usage	In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also <i>inquiry access</i> .
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
work order	In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.
yield by operation	In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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