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# PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook

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PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook  
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# About This PeopleBook

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

This preface discusses:

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

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**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.

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## 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.

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## 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.

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## 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.

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**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.

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### See Also

Oracle's PeopleSoft Customer Connection, [http://www.oracle.com/support/support\\_peoplesoft.html](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](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
<b>Bold</b>	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.

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## 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](mailto:appsdoc@us.oracle.com).

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

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## Common Elements Used in PeopleBooks

<b>As of Date</b>	The last date for which a report or process includes data.
<b>Business Unit</b>	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.
<b>Description</b>	Enter up to 30 characters of text.
<b>Effective Date</b>	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.

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



# PeopleSoft Enterprise CRM Order Capture Applications Preface

This preface discusses:

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

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

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## PeopleSoft Enterprise CRM Application Fundamentals

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

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

- CRM Multi-Product Foundation.

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

- Workforce Management.

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

- Interactions and 360-degree views.

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

- Self-Service for Customers.

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

- Relationship Management.

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

- Entitlement Management.

This part discusses setting up agreements and warranties.

- SmartViews.

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

### **See Also**

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*

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## **PeopleSoft Enterprise CRM 9 Industry Application Fundamentals**

The *PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook* discusses configuration options including security and financial account administration common to PeopleSoft vertical solution applications.

The *PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook* contains essential information describing the setup and design of PeopleSoft CRM industry-specific applications and the use of features that are common to multiple applications within PeopleSoft CRM industry applications, including information about:

- Industry-specific tables.
- Industry-specific setIDs and roles.
- Products for industries.
- Arrangements and contracts.
- Industry-specific business objects.
- Application security for financial services.
- Financial accounts.
- Churn management.
- Fraud management.

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## **PeopleSoft Enterprise CRM Automation and Configuration Tools**

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

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), business projects, and scripts.

- Configuration tools.

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

- Knowledge management.

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

- 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*

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## PeopleSoft Enterprise CRM Services Foundation

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

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

- Solution management.

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

- Transaction Billing Processor Integration.

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

- Environmental Systems Research Institute (ESRI) integration.

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

### See Also

*PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook*

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## PeopleSoft Enterprise CRM Business Object Management

The *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft CRM.

The PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook has these parts:

- Business Object Management Basics.

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

- Data Management for Organization Business Objects.

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

- Data management for Individual Business Objects.

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

- Business Object Management.

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

- Customer and Worker Data Integrations.

This part discusses how to integrate customer and worker data with other systems. PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook.

### See Also

*PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*

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## PeopleSoft Enterprise CRM Product and Item Management

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

### See Also

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*

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## PeopleTools PeopleBooks

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

## **PART 1**

# **Order Capture Applications**

### **Chapter 1**

**Getting Started with PeopleSoft Enterprise CRM Order Capture Applications**

### **Chapter 2**

**Navigating in Order Capture**



# CHAPTER 1

## Getting Started with PeopleSoft Enterprise CRM Order Capture Applications

This chapter provides an overview of PeopleSoft Enterprise Order Capture applications and discusses:

- PeopleSoft Order Capture business processes.
- PeopleSoft Order Capture integrations.
- PeopleSoft Order Capture and PeopleSoft Order Capture Self Service implementation.

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**Note.** Although Order Capture and Order Capture Self Service are separately licensed applications, most references to business processes and implementation steps in this chapter apply equally to both applications.

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### PeopleSoft Enterprise Order Capture Applications Overview

PeopleSoft Customer Relationship Management (PeopleSoft CRM) consists of two applications which contribute to the interactive selling experience:

- *PeopleSoft Enterprise Order Capture.*

This internally facing application is a robust customer relationship management (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.

#### Order Capture Applications

Order Capture applications utilize:

- The CRM customer data model (CDM, also referred to as the business object relationship model [BORM]).

The CDM (or BORM) is a powerful tool with which you can define the structure of your customer base and the relationships between various business entities such as companies, sites, partners, resellers, or consumer families. The BORM enables businesses with complex business models to define this data structure within their CRM systems, which controls system behavior, workflow, and business rules according to that definition.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*.

- The CRM product data model.

This data model enables the definition and creation of the products and services the PeopleSoft software will support. You have numerous options in doing so such as, dynamic packages, nested packages, product relationships, and complex configurations.

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

- PeopleSoft Enterprise Pricer.

This pricing tool uses the latest PeopleTools technologies to deliver a robust, high-performance engine. It integrates seamlessly with Order Capture applications to apply complex pricing structures and scenarios. PeopleSoft Enterprise Pricer has an intuitive user interface that is geared to use by your marketing managers.

See *PeopleSoft Enterprise CRM Enterprise Pricer 9 PeopleBook*, “PeopleSoft Enterprise Pricer for CRM Preface”.

- CRM catalog.

CRM catalog functionality is available to Order Capture applications. With it, you can create region-specific catalogs, display template configurations, apply permission-filtering, and enable product comparisons. CRM catalogs integrate fully with Order Capture, Order Capture Self Service, and PeopleSoft Advisor for the purpose of product, service, or solution recommendations. Additionally, Catalog Search employs the Verity search engine.

See *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, “Creating Catalogs”.

## Order Capture

Order Capture offers these features:

- Order and quote management.

Order Capture delivers order and quote management functionality for both tangible and nontangible products, such as services. (For example, a monthly service agreement for cable television service is a service product.)

- Order Capture workbenches.

Order Capture workbenches are unique to the enterprise, and they perform three main functions. First, they are a central navigation point from which you can set up Order Capture and Order Capture Self Service, after you have defined your business units. The system consolidates specific setup tasks into one of three workbenches: Setup Workbench, Capture Type Workbench, and Integration Workbench. These workbenches all appear in the Set Up CRM, Product Related, Order Capture menu.

Second, you can configure the ‘look and feel’ of the Order Capture runtime pages by defining and then selecting specific display templates.

Third, you can create application class sets and plug the logic of those application classes into a workbench feature to create new events for your order capture business process.

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**Note.** The Customer Connection document “Understanding Application Classes in Order Capture and Order Capture Self Service” explains how to harness the power of application classes.

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- Functional Area Navigation (FAN) pages, personalizations, and hotkeys.

CSRs can begin their interactive selling activities from a FAN page that provides one-click access to the main features of Order Capture. Customer Service administrators can personalize the look and feel of the order entry form for CSRs and CSRs can use hotkeys for rapid data entry.

- Integration with fulfillment.

Order Capture provides integration with both PeopleSoft and third party fulfillment systems or supply chain management products. For example, there is a tight integration with PeopleSoft Supply Chain Management (PeopleSoft SCM) so that order fulfillment and detailed maintenance activity is possible.

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**Note.** Integration points support the sending and receiving of orders, quotes, product availability, and order status information.

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- Order capture business projects.  
Configurable business projects power order fulfillment. Business projects enable you to configure the phases, tasks, and events that occur once an order is submitted.
- Interactive Reports.  
Order Capture delivers instant, detailed business analytics information for revenue and metrics. User roles control access to enterprise-wide report information.
- Quick Create.  
Order Capture enables you to create customers, consumers, and contacts while you are in the midst of a transaction without having to navigate to the standard setup components to define customer information.
- Correspondence management.  
Order Capture can establish automatic correspondences using email or print for order or quote maintenance, or submission activity. Also, CSRs can generate correspondences manually by clicking the Send Correspondence button on the Entry Form page.
- Support for taxes, including value-added tax (VAT).  
Order Capture integrates with Taxware, Vertex, and WorldTax software applications to calculate and display tax information directly on order forms.
- Integration to Agreements.
- Integration with PeopleSoft Proposal Management.
- Bulk order creation and maintenance.
- Credit card integration.
- Freight integration with ConnectShip.

### **Order Capture Self Service**

In addition to most Order Capture features, Order Capture Self Service delivers:

- Support for self-service registration and profile and address maintenance.
- A Contact Us feature that includes real-time chat with a CSR.
- Security roles and privileges that control what a self-service user sees.
- Quick entry, to enable the rapid creation of orders.
- Order tracking functionality.
- Other standard self-service features, such as Checkout and Shopping Cart.

---

## **Order Capture Applications Business Processes**

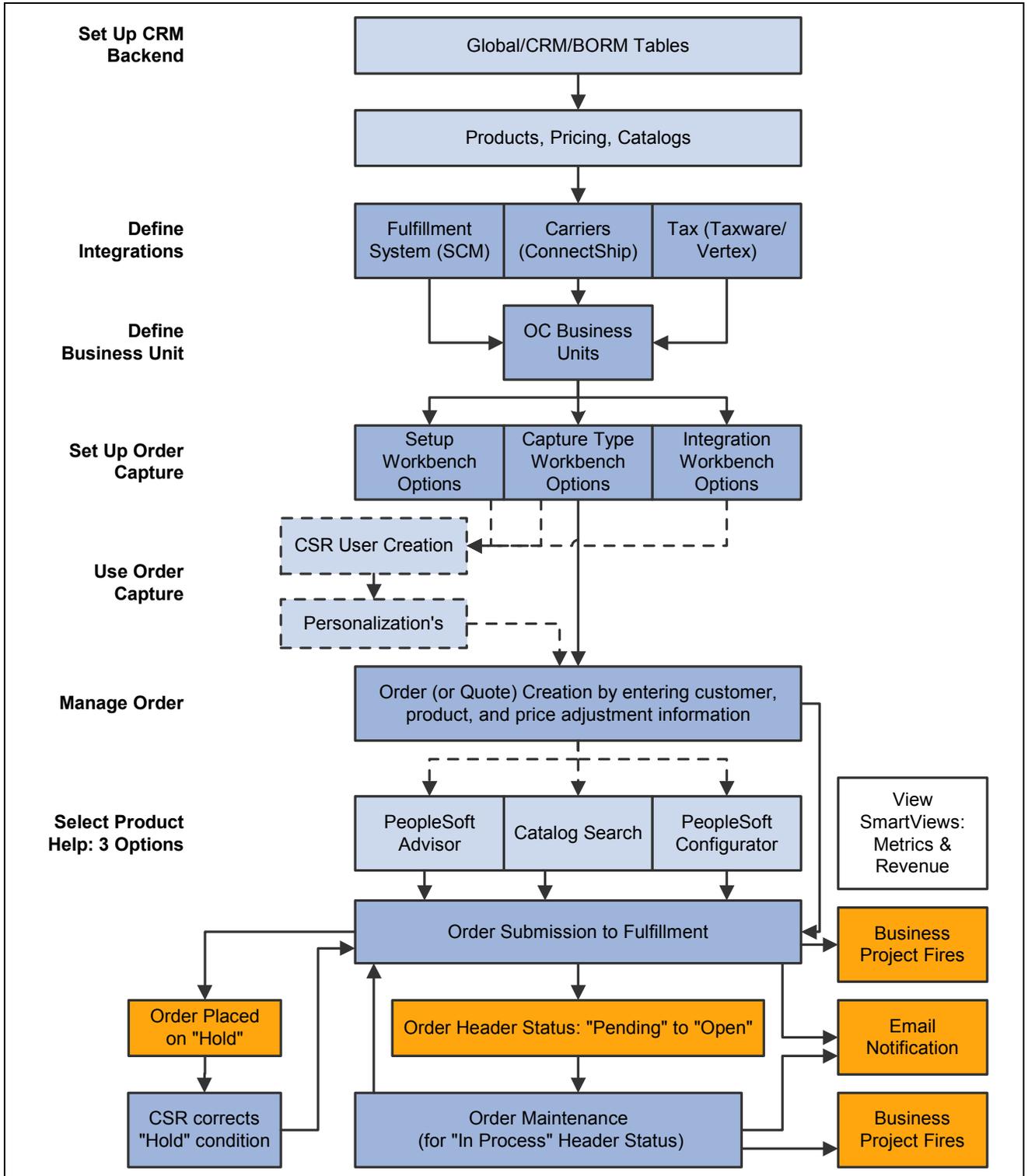
This section discusses the business processes that you can perform using Order Capture applications.

---

## Order Capture Process Flow

This diagram illustrates the primary Order Capture business processes. The diagram identifies:

1. High-level implementation and setup tasks for which an Order Capture implementer is responsible.
2. Main business processes available for use by an Order Capture CSR.



Order Capture process flow

We discuss these setup processes in the setup chapters in this PeopleBook.

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

## See Also

[Chapter 4, “Setting Up PeopleSoft Order Capture,” page 31](#)

[Chapter 13, “Managing Orders and Quotes,” page 227](#)

---

# Order Capture Integrations

Order Capture integrates with most PeopleSoft CRM applications. Generally, this occurs in the form of other CRM applications channeling CSRs, call center agents, marketing managers, or sales representatives to the entry form where they can create an order or quote.

## PeopleSoft CRM Applications

Order Capture integrates directly with these PeopleSoft CRM features or applications:

- 360-Degree View.

- PeopleSoft Advanced Configurator.

This integration enables complex configuration of products directly from the order line.

- PeopleSoft FieldService.

Order Capture provides support for both service order generation and installed products.

- PeopleSoft Marketing.

Order Capture displays campaigns that are targeted to your customers.

- PeopleSoft Real-Time Advisor.

This integration enables CSRs to launch a PeopleSoft Advisor dialog and, using a question and answer session, match a buyer with a recommendation for a product, service, or solution.

- PeopleSoft Sales.

This integration supports the creation of a quote or order from a sales lead or opportunity.

- PeopleSoft Support.

This integration enables call center agents to generate a sale from a case.

- PeopleSoft Telemarketing.

This integration enables telemarketers to quickly convert a phone call opportunity into a sale.

## External Applications

Order Capture and Order Capture Self Service use integration points to connect to fulfillment systems and other third-party applications. PeopleSoft CRM integration points connect you to:

- PeopleSoft SCM or similar systems.

This integration enables order fulfillment.

- Credit Card Integration Point.

This enables integration with third-party credit card authorization and payment vendors directly from Order Capture and Order Capture Self Service.

- Carriers and tax calculation systems.

Integration with ConnectShip (for freight) and Taxware or Vertex (for taxes) enables order capture applications to calculate freight, sales tax, and VAT directly from an order.

This table lists cross-references to third-party information:

Third-Party Application	System Type	Company URL
ConnectShip	Shipping cost calculation	<a href="http://connectship.com">http://connectship.com</a>
Taxware	Sales and use tax calculation	<a href="http://www.taxware.com">http://www.taxware.com</a>
Taxware	WorldTax	<a href="http://www.taxware.com/products/worldtax.html">http://www.taxware.com/products/worldtax.html</a>
Vertex	Sales and use tax calculation	<a href="http://www.vertexinc.com">http://www.vertexinc.com</a>

**Note.** Supplemental information about how to set up third-party application integrations is located on the PeopleSoft Customer Connection website.

## Order Capture Applications Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Order Capture applications also provide component interfaces to help you load data from your existing system into order capture tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the Order Capture components that have component interfaces:

Component	Component Interface	Reference
Order Capture component interfaces:		
CARRIER	CARRIER_SCI_SCI	See <a href="#">Chapter 4, “Setting Up PeopleSoft Order Capture.”</a> <a href="#">Setting Up Freight Integration, page 71.</a>
RO_BUS_UNIT	RO_BUS_UNIT_SCI	See <a href="#">Chapter 3, “Defining Order Capture Business Units.”</a> <a href="#">page 15.</a>
RO_CATALOG	RO_CATALOG_SCI	See <a href="#">Chapter 5, “Understanding Product, Pricing, Proration, and Catalogs.”</a> <a href="#">page 79.</a>
RO_DEFN	RO_DEFN_SCI	See <a href="#">Chapter 4, “Setting Up PeopleSoft Order Capture.”</a> <a href="#">Setting Up Order Capture Tables, page 34.</a>

Component	Component Interface	Reference
RO_DEFN_INTEGRATE	RO_DEFN_INTEGRATE_SCI	See Chapter 4, “Setting Up PeopleSoft Order Capture,” <u>Defining Integrations and Mappings</u> , page 65.
RO_TYPE	RO_TYPE_SCI	See Chapter 4, “Setting Up PeopleSoft Order Capture,” <u>Defining Order and Quote Processing</u> , page 52.
Order Capture Self-Service component interfaces:		
RB_SRTY_PRIV	RB_SRTY_PRIV_SCI	See Part 3, “PeopleSoft Order Capture Self Service,” page 313.
RB_SRTY_PRIV_DELTA	RB_SRTY_PRIV_DELTA_SCI	See Part 3, “PeopleSoft Order Capture Self Service,” page 313.
RB_SRTY_PRIV_DFLT	RB_SRTY_PRIV_DFLT_SCI	See Part 3, “PeopleSoft Order Capture Self Service,” page 313.
RX_GUEST_REG_TMPLT	RX_GUEST_REG_TMPLT_SCI	See Part 3, “PeopleSoft Order Capture Self Service,” page 313.
RX_REP_REG_TABLE	RX_REP_REG_TABLE_SCI	See Part 3, “PeopleSoft Order Capture Self Service,” page 313.

## Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, with information about where to find the most current version of each.

## See Also

*PeopleSoft Enterprise Setup Manager for CRM 9 PeopleBook*

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

*Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Component Interfaces*

## CHAPTER 2

# Navigating in Order Capture

This chapter lists the pages used to navigate in Order Capture.

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## Navigating in Order Capture

Order Capture provides custom navigation pages that contain groupings of folders that support a specific business process, task, or user role.

---

**Note.** In addition to the Order Capture custom navigation pages, Order Capture provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

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### See Also

*Enterprise PeopleTools 8.48 PeopleBook: Using PeopleSoft Applications*

## Pages Used to Navigate in PeopleSoft Enterprise Order Capture

This table lists the custom navigation pages that are used to navigate in PeopleSoft Enterprise Order Capture.

### Order Capture Setup Center

Use these pages to navigate in the Order Capture Setup Center.

Page Name	Navigation	Usage
Order Capture Setup Center	Main Menu, Setup CRM	Set up and configure features, including products, pricing rules, and catalogs.
Define Configurator Schema	Click Define Configurator Schema on the Order Capture Setup Center page.	Set up user interface, pricing, and output of configured products and services.
Products and Items	Click Products and Items on the Order Capture Setup Center page.	Access the Inventory Item Definition, Product Definition, Product Unit of Measure, and Product Price pages to create and maintain products, packages, items, and pricing.
Pricing Rules	Click Pricing Rules on the Order Capture Setup Center page.	Access the Environment, Price List, Arbitration Plan, and Price Rule page to create multiple price lists and pricing rules.

Page Name	Navigation	Usage
Catalogs	Click Catalogs on the Order Capture Setup Center page.	Access the Catalog Definition and Catalog Template Definition pages to create and maintain catalogs, templates, and installation options.
Advisor Dialogs	Click Advisor Dialogs on the Order Capture Setup Center page.	Access the Advisor Dialog Creation and Environment pages to create and maintain advisor dialogs.

### Order Capture Center

Use these pages to navigate in the Order Capture Center.

Page Name	Navigation	Usage
Order Capture Center	Main Menu	Manage quotes and orders, and browse products and services.
360-Degree View	Click 360–Degree View on the Order Capture Center page.	View details of all customer quoting and ordering activity.
Find Products	Click Find Products on the Order Capture Center page.	Browse and search all available products and services.
Quotes	Click Quotes on the Order Capture Center page.	Access the Add Quote and Search Quote pages to create and manage quotes.
Interactive Reports	Click Interactive Reports on the Order Capture Center page.	Access the Enterprise Order Revenue, Enterprise Order Metrics, Order Revenue, and Order Metrics pages to run Order Capture Interactive Reports.
Order	Click Order on the Order Capture Center page.	Access the Add Order, Add Bulk Order, and Search Orders pages to create and manage orders.
Service Management	Click Service Management on the Order Capture Center page.	Access the Maintain Service, Bulk Maintain Service, Start Service, Transfer Service, Stop Service, and View Service Management Order pages to create and maintain services.

## **PART 2**

# PeopleSoft Order Capture

**Chapter 3**  
**Defining Order Capture Business Units**

**Chapter 4**  
**Setting Up PeopleSoft Order Capture**

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**Understanding Product, Pricing, Proration, and Catalogs**

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**Chapter 9**  
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**Chapter 11**

**Working with Future Dated Orders and Temporary Services**

**Chapter 12**

**Working with Subscription Management**

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**Managing Orders and Quotes**

**Chapter 14**

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**Chapter 15**

**Understanding Order Capture Integration with PeopleSoft Policy and Claims Presentment and PeopleSoft Banking Transactions**

**Chapter 16**

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**Chapter 17**

**Working with Interactive Reports for Order Capture**

## CHAPTER 3

# Defining Order Capture Business Units

This chapter provides an overview business units and discusses how to define Order Capture business units.

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## Understanding Business Units

A business unit is an operational subset of an organization. Each business unit has its own way of storing information and has its own processing guidelines. You can use one business unit for all situations, or you can divide operations based on whatever criteria make the most sense. For example, you can create business units for different product lines or regions or even entry source. Order Capture transactions use business units as key identifiers. Once you determine how many business units you need and how to organize them, define them in the Order Capture system.

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**Note.** PeopleSoft implementation personnel can help you to define an appropriate business unit structure.

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In Order Capture, business units drive the business process of creating and tracking orders that customer service representatives (CSRs), sales representatives, and self-service customers create. To implement Order Capture, you must create order capture business units. These business units define processing rules to capture orders and enable the integration with other PeopleSoft applications, such as Order Management.

For integration purposes, ensure that business unit definition records are synchronized across all systems. Business unit definitions that you create in PeopleSoft CRM are available in PeopleSoft Supply Chain Management. You must make PeopleSoft Order Management and Inventory business unit definitions available to PeopleSoft CRM. To synchronize business unit records across your business enterprise, use the business unit enterprise integration point (EIP).

This is the process for defining business units:

1. Define global PeopleSoft business units, if you run multiple PeopleSoft applications.
2. Define PeopleSoft Customer Relationship Management (PeopleSoft CRM) business units.
3. Link PeopleSoft business units and PeopleSoft CRM business units to Order Capture.

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**Note.** For example, you can create a business unit in Order Capture, and connect that business unit to Sales later.

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Before you create multiple order capture business units, ensure that you understand tableset controls, which you use to determine values for fields on transactional pages.

### See Also

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

## Defining Order Capture Business Units

This section discusses how to create Order Capture business units.

**Note.** In Order Capture Self Service, you must define business unit settings on the Order Capture Definition and Self Service Options pages.

### See Also

[Chapter 18, “Defining Order Capture Self-Service Business Units,” page 315](#)

## Pages Used to Define Order Capture Business Units

Page Name	Object Name	Navigation	Usage
Order Capture Definition – Internal	BUS_UNIT_RO1	Set Up CRM, Business Unit Related, Order Capture Definition	Create Order Capture business units, update existing business units, and establish default business units.
Order Capture Definition – Communications	BUS_UNIT_RBT	Set Up CRM, Business Unit Related, Order Capture Definition  On the Internal tab, select the check box for Show Communications Tab, then select the Communications tab.	Specify order capture business unit settings specific to telecommunications service providers.

## Creating Order Capture Business Units

Access the Order Capture Definition page.

<p><b>Internal</b>   <u>Self Service</u></p>	
<p><b>Business Unit</b> US001</p>	
<p>*<b>Description</b> New York Operations</p>	<p>*<b>Status</b> Open</p>
<p>*<b>Short Description</b> US001</p>	<p><input checked="" type="checkbox"/> <b>Default Business Unit</b></p> <p><input type="checkbox"/> <b>Submit Confirmation</b></p> <p><input type="checkbox"/> <b>Show Communications Tab</b></p>
<p><b>Business Unit</b></p>	
<p><b>FieldService</b> US200</p>	<p><b>Marketing</b> US001</p>
<p><b>Order Management</b> US001</p>	<p><b>Proposal Management</b></p>
<p><b>Contracts</b></p>	<p><b>General Ledger</b></p>
<p><b>Tax Settings</b></p>	
<p>*<b>Tax Vendor</b> None   <a href="#">Test Tax Interlink</a></p>	<p><b>Company</b> PSFT</p>
<p><b>Order Origin</b> New Jersey Operations</p>	<p><b>Division</b></p>
<p><b>Order Acceptance</b> California Location</p>	<p><b>Store Location</b></p>

Order Capture Definition page: Internal tab (1 of 3)

<p><b>Order Capture</b></p>	
<p>*<b>Freight Vendor</b> None   <a href="#">Test Freight</a></p>	<p>*<b>Card Vendor</b> None</p>
<p><b>Ship From</b> Connecticut Operations</p>	<p><b>Source</b> Phone</p>
<p><b>Preferred Carrier</b></p>	<p><b>Capture Priority</b> Medium</p>
<p><b>Quote Conversion Warning</b> No Warning</p>	<p><b>Base Currency</b> US Dollar</p>
<p>*<b>Site Address Includes</b> Customer Bill To Addresses</p>	<p><b>Rate Type</b> Average</p>
<p><b>Fulfillment Specialist Email</b></p>	<p><b>Credit Rating Value</b></p>
<p><b>Catalog Refresh (Minutes)</b></p>	<p><b>Quote Valid For</b> 30   <b>Days Quote Due</b> 5</p>
<p><b>Bill Type Identifier</b></p>	<p><b>Bill Source</b></p>
<p><b>Default Service Duration</b>   Months</p>	<p><b>Quote Conversion</b> Convert to Order and Subm</p>
<p><b>Order Level Adjustments</b> Do Not Prorate Adjustments</p>	<p><b>Schedule</b> 15th of each month</p>
<p><b>Subscription Term</b> 1 Year Term</p>	<p><b>Clone Options</b></p> <p><input type="checkbox"/> <b>Copy Line Adjustment</b></p> <p><input checked="" type="checkbox"/> <b>Copy Header Adjustment</b></p>
<p><b>Non-submitted Order Valid For</b></p> <p><input type="checkbox"/> <b>Allow Line AAF Processing</b></p>	
<p><b>Agreement Coverage Grid</b> Always Populate Grid</p>	
<p><b>Order Change Notifications</b></p>	
<p><b>Accepted</b> Notify CSR Only</p>	
<p><b>Partially Accepted</b> Notify CSR and Customer</p>	
<p><b>Rejected</b> Notify CSR and Customer</p>	
<p><b>Advisor Dialogs</b></p> <p><input type="checkbox"/> <b>Display Session Information</b></p>	
<p><b>Bulk Order</b></p>	
<p><b>Consumer Hierarchy</b> CONS_HIERARCHY</p>	<p><input type="checkbox"/> <b>Multiple Orders Per Recipient</b></p>
<p><b>Organization Hierarchy</b> CUST_HIERARCHY</p>	

Order Capture Definition page: Internal tab (2 of 3)

<b>Fulfillment</b>	
<input checked="" type="checkbox"/> <b>Fulfillment Logging</b>	
<b>Catalog Display Options</b>	
<input checked="" type="checkbox"/> <b>Display By Customer</b>	<b>Priority</b> 1
<input checked="" type="checkbox"/> <b>Display By Partner Contact</b>	2
<input checked="" type="checkbox"/> <b>Display By User</b>	3
<input type="checkbox"/> <b>Display Browse Catalog</b>	
<b>Order Submission</b>	
<input checked="" type="checkbox"/> <b>Allow Future Dated Orders</b>	<b>Submission Mode</b> Only Queue Future Dated Or
<input type="checkbox"/> <b>Allow Temporary Services</b>	<b>Price Order</b> Price as Lines Added
<input type="checkbox"/> <b>Line Dates Editable on Order</b>	
<input checked="" type="checkbox"/> <b>Use Lead Time for Start Date</b>	

Order Capture Definition page: Internal tab (3 of 3)

<b>Business Unit</b>	Displays the business unit that you entered to access the page. <hr/> <b>Note.</b> If the company uses more than one PeopleSoft application and defines the same business units across applications, use the same name for business units that are designed to share the same setID. <hr/>
<b>Description</b>	Enter a description of the business unit. This description appears on the Order Capture Entry Form page and in other places where the business unit appears.
<b>Status</b>	Select an <i>Open</i> or <i>Closed</i> status. You cannot process transactions for a closed business unit.
<b>Short Description</b>	Enter a brief description of the business unit. This description appears on the Order Capture Entry Form page and in other places where the business unit appears.
<b>Default Business Unit</b>	Select to specify that this business unit as the default business unit. If no order capture business unit is defined on the Overall Preferences page for the user who logged on, the system uses the default business unit that you identify as the default business unit for new orders and quotes.  The system uses the same mechanism to determine a user’s access to catalogs. <hr/> <b>Note.</b> This check box appears only after you create a business unit. <hr/> See <i>PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook</i> , “Setting Up Security and User Preferences”.
<b>Default Set ID</b>	Enter the setID that determines your preliminary tableset sharing setup. This setID determines the setIDs that the system assigns to each record group for the new business unit, and the setID that is assigned to a record group determines the tableset that provides values for the business unit. If you enter an existing setID, the system copies the set control definition of that business unit to the new business unit. <hr/> <b>Note.</b> This field appears only when you open the page in Add a New Business Unit mode. It disappears after you create the business unit. <hr/>

<b>Submit Confirmation</b>	<p>Select to view a confirmation page once an order or quote is submitted. If the submission was successful, the CSR can either return to the order or quote just submitted or begin to create a new order or quote. If the submission was placed on hold, the CSR is able to link directly to the Holds page.</p> <p>If you clear this option, the system populates the header statuses automatically, and the Submit Confirmation page does not appear.</p>
<b>Create BU</b> (create business unit)	<p>Click to establish the setID controls for the order capture business unit based on the default setID that you specify.</p> <hr/> <p><b>Note.</b> This button appears only when you open the page in Add a New Business Unit mode. It disappears when you create the business unit.</p> <hr/>
<b>Business Unit</b>	
<b>Field Service</b>	<p>Enter the PeopleSoft FieldService business unit to map to this order capture business unit.</p> <hr/> <p><b>Note.</b> When ordering a product that requires installation, a service order is created in this PeopleSoft FieldService business unit.</p> <hr/>
<b>Marketing</b>	<p>Enter the PeopleSoft Marketing business unit to map to this order capture business unit. Order Capture displays campaign offers that are associated with this Marketing business unit.</p>
<b>Order Management</b>	<p>Enter the PeopleSoft Order Management business unit to map to this Order Capture business unit. Order Capture maps to this Order Management business unit for order fulfillment.</p>
<b>Proposal Management</b>	<p>Select the PeopleSoft Proposal Management business unit with which Order Capture integrates.</p> <hr/> <p><b>Note.</b> PeopleSoft Proposal Management is part of a suite of Enterprise Service Automation (ESA) applications, within the PeopleSoft Financial Management Solutions product line. PeopleSoft CRM can send PeopleSoft Proposal Management information when an engagement service product is included in a quote and receive pricing information when an engagement is fulfilled in PeopleSoft Proposal Management.</p> <hr/>
<b>Contracts</b>	<p>Enter the PeopleSoft Contracts business unit to map to this Order Capture business unit. This only applies if you want to take advantage of the integration from Order Capture to PeopleSoft's billing system.</p>
<b>General Ledger</b>	<p>Enter the PeopleSoft General Ledger business unit to map to this Order Capture business unit. This enables the PeopleSoft General Ledger application to record billing information.</p> <hr/> <p><b>Note.</b> This only applies if you want to take advantage of the integration between Order Capture and PeopleSoft's billing system.</p> <hr/>

## Tax Settings

<b>Tax Vendor</b>	Select a tax vendor. If you select <i>Taxware</i> , <i>Vertex</i> , or <i>WorldTax</i> , Order Capture integrates with the relevant third-party system for tax calculations. If you want value-added tax to be part of your pricing calculations during order entry, select <i>WorldTax</i> . If you select <i>None</i> , the system does not calculate taxes when creating orders or quotes.
	<hr/> <b>Note.</b> You cannot show tax on an order or quote unless you select a vendor. <hr/>
<b>Test Tax Interlink</b>	Click to verify that the tax integration is functioning correctly.
	<hr/> <b>Note.</b> Ensure that the business interlink is properly configured before testing the integration. <hr/>
<b>Company and Division</b>	Enter codes that Taxware and Vertex use for reporting and tax calculation purposes. Check the vendor documentation for further information.
<b>Order Origin</b>	Enter the business unit where sales orders originate. Taxware references this location to calculate sales taxes for local jurisdictions that use this information in their taxing practices. Check the Taxware documentation for further information.
<b>Order Acceptance</b>	Enter the business unit where orders are accepted. Both Taxware and Vertex reference this location to calculate sales taxes. Check the Taxware or Vertex documentation for further information.
<b>Store Location</b>	(Optional) Enter the Store Location parameter used by third party tax vendors. This is a 10 character maximum field.
<b>Order Capture</b>	
<b>Freight Vendor</b>	Select a freight vendor type. Values are: <i>None</i> : No freight is calculated on the order. <i>External</i> : Order information is passed to an external vendor such as ConnectShip, and the calculated freight amount appears on the order.
<b>Test Freight</b>	Click this link to verify that the freight integration is functioning correctly.
<b>Card Vendor</b>	Select a card vendor. If you select <i>3rd party</i> , the system submits credit card information to a third-party system for credit card authorization processing.
<b>Ship From</b>	Enter a ship-from location, assuming that all products ship from this location. This information is used when calculating taxes and freight costs.
<b>Source</b>	Enter an informational code that identifies the source of the order. For example, you could specify <i>Phone</i> if you receive most orders for this business unit by telephone.
	<hr/> <b>Note.</b> The CSR can change this field's default value. <hr/>
<b>Preferred Carrier</b>	Select the default carrier that you want to use when creating orders or quotes.

<b>Capture Priority</b>	Select a capture priority of <i>Urgent</i> , <i>High</i> , <i>Medium</i> , or <i>Low</i> to specify the default priority for all orders that are created in the business unit. You can change the priority during order creation.
<b>Quote Conversion Warning</b>	Unless specified on the business unit definition, a quote that is converted to an order will automatically be submitted. When a quote that contains an engagement service product is converted, the engagement service is updated in the PeopleSoft Proposal Management system. If you want to display a warning for the CSR which indicates that the quote that is about to be converted to an order contains at least one Engagement Service product, then select <i>Display Warning</i> . If you want to bypass the warning, select <i>No Warning</i> .
<b>Base Currency</b>	Enter the default currency. A base currency is required for the business unit, even if you are not transacting in foreign currencies.
<b>Site Address Includes</b>	Select an order capture site address. The selection here includes all existing site addresses for a customer. You can increase the number of addresses available during order entry. Values are: <ul style="list-style-type: none"> <li>• <i>Site addresses only</i>: Displays site addresses only.</li> </ul> <hr/> <p><b>Note.</b> This is the default selection.</p> <hr/> <ul style="list-style-type: none"> <li>• <i>All customer addresses</i>: Displays the existing site addresses plus all other customer addresses.</li> <li>• <i>Customer Bill To addresses</i>: Displays the existing site addresses plus any billing addresses.</li> <li>• <i>Customer Ship To addresses</i>: Displays the existing site addresses plus any shipping addresses.</li> </ul>
<b>Rate Type</b>	Select the method that the system uses to set the exchange rate between currencies for Order Capture transactions.
<b>Fulfillment Specialist Email</b>	Enter an email address to which an email is sent if you create an order that contains a literature-type product.
<b>Credit Rating Value</b>	Enter a minimum credit rating value. If the customer's credit rating is less than this amount, the order that is associated with that customer is automatically placed on hold.
<b>Catalog Refresh (minutes)</b>	Enter a catalog refresh interval amount in minutes. When you view the product catalog, the system automatically checks when the last refresh occurred. If the interval since the last refresh is greater than the time that you enter here, the system forces a refresh.
<b>Quote Valid For</b>	Enter the default number of days for which a quote is valid after the creation date. The system adds this number to the quote creation date to calculate the expiration date. Once the expiration date passes, the status changes to <i>Expired</i> .
<b>Days Quote Due</b>	Enter the number of days that the system automatically adds to the quote creation date to indicate a final date by which a quote should be converted to an order. A quote's due date is then set to the resulting date. For example, if you want quotes to elapse 30 days after creation, enter <i>30</i> here.

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	<b>Note.</b> The number that you define here does not appear on the quote itself.
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<b>Bill Type Identifier</b>	Select the bill type that you want associated with the setID. The bill type prompts on all bill type identifier codes that are synchronized from PeopleSoft Billing. The bill type identifier is a user-defined value in PeopleSoft Billing. Order Capture delivers CRM_ORDER as sample data.
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	<b>Note.</b> On the Billing and Pricing Options page, the Bill Type field is optional. If it is not defined in PeopleSoft CRM, the billing plan in PeopleSoft Contracts sets the field based on the PeopleSoft Contracts business unit.
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<b>Bill Source</b>	Select the bill source that you want associated with the setID. The bill source prompts on all bill source identifier codes that are synchronized from PeopleSoft Billing. The bill source code is a user-defined value in PeopleSoft Billing. Order Capture delivers CRM_ORDER as sample data.
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	<b>Note.</b> On the Billing and Pricing Options page, the Bill Source field is optional. If it is not defined in PeopleSoft CRM, the billing plan in PeopleSoft Contracts sets the field based on the PeopleSoft Contracts business unit.
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<b>Default Service Duration</b>	For a service, specify a start date and an end date on an order. The end date is calculated by adding the duration to the start date. If you have not specified a duration on the product definition, the order will pick up the duration from this field. Duration is the numeric value plus the quantifier, which is either <i>days</i> , <i>months</i> , <i>quarters</i> , <i>weeks</i> , or <i>years</i> .
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<b>Quote Conversion</b>	Select <i>Convert to Order Only</i> if you want to give the CSR the chance to modify an order prior to submission. Select <i>Convert to Order and Submit</i> if you want quotes that are converted to orders to automatically be submitted. This is the default selection.
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	<b>Note.</b> Your selection here will apply to all orders placed from this business unit.
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<b>Order Level Adjustments</b>	Select if you want to prorate adjustments or not.
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<b>Schedule</b>	Select the default schedule for subscription products.
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<b>Subscription Term</b>	Select the default term for subscription products.
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<b>Agreement Coverage Grid</b>	Select an option to indicate when to populate the agreements covered product grid. <ul style="list-style-type: none"> <li>• <i>Always Populate Grid</i> Select to automatically populate the covered products grid with eligible products.</li> <li>• <i>Populate Upon Request</i> When this option is selected the Include Ordered Products link is displayed on the Select Covered Products grid. Clicking the link adds any additional eligible products from the order onto the grid, so that they may be added to the agreement.</li> </ul>
--------------------------------	--

- *Notify CSR Only*

Select to notify the CSR of any additional eligible products that can be ordered to the agreement.

## Clone Options

Select Clone Options to determine adjustments that will be carried into the cloned order.

When Order Level Adjustments = Do Not Prorate Adjustments, both clone options are available.

When Order Level Adjustments = Prorate Order Adjustment, Copy Header Adjustment is selected and is read only.

When both the clone options are selected, both line level and order level adjustments are copied when an order or quote is cloned, when an order is converted to a quote, or when a quote is converted to an order.

When Copy Line Adjustment is checked, only the line adjustment is copied in both the order and quote.

When Copy Header Adjustment is checked, both line adjustment and order level adjustments are copied in a quote whereas only order level adjustments are copied in an order.

**Copy Line Adjustment**      Select this option to carry the line adjustment into the cloned order.

**Copy Header Adjustment**      Select this option to carry the header adjustment into the cloned order.

## Order Change Notifications

The system can send order change notifications to specified parties when order maintenance occurs, and Order Capture receives a message from the fulfillment system.

**Accepted, Partially Accepted, and Rejected**      Select the recipients that you want Order Capture to notify when the fulfillment system informs PeopleSoft CRM that order changes are fully accepted, partially accepted, or rejected. Values are:

- *Notify CSR Only.*
- *Notify CSR and Customer.*
- *Notify Customer Only.*
- *Notify Nobody.*

## Advisor Dialogs

**Display Session Information**      Select to display the Advisor Dialog Session information when a dialog is accessed from Internal Order Capture. If not selected, the Advisor Dialog Session information will not appear when a dialog is accessed.

## Bulk Order

On the Order Capture Definition page, you plug in relationship views for both consumers and organizations. The master order/recipient order relationships are determined by the relationships that you establish in the Relationship Viewer.

**Consumer Hierarchy**      Select a relationship view for a single consumer, or contact. This will determine all of the possible bulk order recipients at runtime by automatically populating all of the child relationships for the parent chosen here.

**Multiple Orders Per Recipient** Select this check box to allow single recipients to receive more than one order. An Order field appears on the runtime page, enabling you to enter the number of orders you want to specify per recipient.

**Organization Hierarchy** Select a relationship view for the company, or organization. When the end user enters a company name, it will prompt against the table you select here to determine the child relationships available.

## Fulfillment

**Fulfillment Logging** This flag enables logging of fulfillment data. When this flag is checked and the order is submitted, business project activity, such as phase task, is captured in the table RO\_OB\_LOG. The log contains fulfillment data for transactions that occur from the time the Fulfillment Logging check box was selected. Data from fulfillment activity prior to that time is not available.

## Catalog Display Options

**Display Browse Catalog** Select this check box to display the browse catalog along with the search tree hierarchy while searching in Order Capture.

**Display by Customer, Display By Partner Contact, and Display By User** Select the check box to indicate if catalogs should be displayed by User, by Customer, or by Partner.

---

**Note.** When catalogs are displayed from the order, the list of authorized catalogs can vary depending on the selected partner, customer, and user logged in.

When a partner or customer is not selected on the order, the list of authorized catalogs will depend strictly on the user logged in. In that case, only catalogs that the user is specifically authorized for will be available.

---

**Priority** Select the priority to determine which catalog is displayed. The priority indicates which catalog takes precedence if more than one mode qualifies.

## Order Submission

**Allow Future Dated Orders** Select to enable future dated order functionality. This enables the user to create orders that is executed at a date in the future. The orders are queued until execution time when they are submitted in the background.

**Allow Temporary Services** Select to enable the user to order a service for a duration less than the normal service duration. This option is not supported for subscriptions or agreements.

**Line Dates Editable on Order** Select to enable the user to modify the order line start/end date to be different than scheduled fulfillment date.

---

**Note.** If this option is selected, dates are only editable in certain circumstances depending on the product.

---

**Use Lead Time for Start Date** Select to calculate the default for the start date using the product lead time and the scheduled fulfillment date.

**Submission Mode**

Select to control when the business logic for the order is launched. This enables a quicker submission processing if the business logic is not launched immediately on submission. Depending on the order type and action, business processes or business projects, will run, these deliver the business logic for the order. Launching these processes in the background and not directly upon submission makes for a quicker response to the user. A process triggered by the *QUEUED\_ORDER\_SUBMISSION* Schedule JobSet Definition can submit orders in the background.

---

**Note.** For any option other than *Do Not Queue*, you must activate the *QUEUED\_ORDER\_SUBMISSION* Schedule JobSet Definition. This JobSet Definition starts the business projects in the background for queued orders.

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- *Do Not Queue* Do not queue the orders. Start order business logic immediately upon submission.
- *Only Queue Future Dated Orders* Queue orders only if their Scheduled Fulfillment Date is in the future. These queued orders are automatically submitted by the *QUEUED\_ORDER\_SUBMISSION* JobSet at a future calculated execution date and the business logic run. For this option, the *QUEUED\_ORDER\_SUBMISSION* JobSet can be run once a day to pick up orders that are waiting in the queue and are ready to be submitted based on their execution date.
- *Queue All* Queue all orders regardless of the Scheduled Fulfillment Date. The orders are automatically submitted in the background by the *QUEUED\_ORDER\_SUBMISSION* JobSet and the business logic run. For this option, the *QUEUED\_ORDER\_SUBMISSION* JobSet should be run at a frequent interval to pick up orders that are waiting in the queue and to submit them in the background.

See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler*

**Price Order**

The Price Order flag controls when the pricing engine will be called to retrieve the unit price. List prices will always be retrieved regardless of the Price Order value. Additionally, when an order is submitted, it will always be repriced prior to the submit.

*Price as Lines Added:* This is the default, and will cause a reprice of the entire order as each new line is added to the order. This will keep the order total up-to-date as new lines are added, however, it is the least efficient method of pricing and should only be the choice when orders are seldom over 20 lines.

*Price at Save:* This pricing option will not price the order until the order is saved, or when the Update Totals button is pressed. As new lines are added to the order, only their list prices are retrieved. The order totals are not updated until pricing is called. This method is preferred when orders contain a large number of lines.

*Price at Update Totals:* This pricing option will only price the order when the Update Totals button is pressed. As new lines are added to the order, only their list prices are retrieved. The order totals are not updated until pricing is called. Also, the order may be saved without calling pricing. This option may be preferred when very large orders are entered, and the order is saved along the way. The save will be much faster as pricing is not involved.

# Creating Order Capture Business Units for Telecommunications Services

Access the Communications business unit setup page.

Internal
Self Service
Communications

**Business Unit** COM01 **Description** Communications

**Mobile Number Portability**

**Port-In Allowed**      \*Temporary Phone Numbers Optional

**PAC Required**                      \*Port In Cancellations Never allow cancel

OCN 1234                      **Default Port-In Days** 1

Network ID N13244334433

**Pre-Paid Accounts**

**Prepaid Accounts Allowed**      **Threshold Amount** 0

**Auto Load** CONSUMER,PREPAID

**Do Not Contact**

**Security Question**

**Wireless Service Provider** Find | View All    First 1 of 3 Last

+ -

\*Provider ID CINGULAR                      \*Status Active

Description Cingular                      **Contact Name** Joe Cingcontact

Network ID C89765                      OCN 5511

**Validation Methods Available**

**Automatic**                                       **Fax Number**  

**Phone**                                         **Website URL** http://www.cingular.com

Order Capture Definition page: Communications tab (1 of 3)

**Wireless Service Provider** Find | View All    First 1 of 3 Last

+ -

\*Provider ID CINGULAR                      \*Status Active

Description Cingular                      **Contact Name**  

Network ID                        OCN  

**Validation Methods Available**

**Automatic**                                       **Fax Number**  

**Phone**                                         **Website URL** http://www.cingular.com

**Phone Number and SIM Assignment on Order** Find | View All    First 1 of 5 Last

+ -

**Source Code** CTI

**Phone Number required**                       **Handset Serial Number required**

**Auto-default Phone Number**

**SIM Number required**

Order Capture Definition page: Communications tab (2 of 3)

Service Management							View All	First	1-3 of 3	Last
Line Action	Reason	Create Lead	Delay Lead in Days	Send Email	Delay Email in Days	Email Template				
Disconnect	Lost or Stolen	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	4	Svc Mgmt Lost Stolen W	+ -			
Suspend/Change	Lost or Stolen	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	4	Svc Mgmt Lost Stolen H	+ -			
Suspend	Lost or Stolen	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	4	Svc Mgmt Lost Stolen H	+ -			

**Customer supplied handset**

Product ID

Order Capture Definition page: Communications tab (3 of 3)

If your implementation includes services for phone number assignment, wireless equipment tracking, or prepaid services and accounts, access both the Internal business unit setup page previously described, as well as the Communications setup page described in this section.

**Note.** In order for the Communications business unit setup page to be displayed, the check box for Show Communications Tab on the Internal business unit page must be selected.

See [Chapter 9, “Working with PeopleSoft Service Management,” page 145.](#)

## Mobile Number Portability

### Port-In Allowed

This will control whether the enterprise user will be allowed to enter port in information for wireless service. The option to port in and existing mobile number will be presented on the number search page when this is checked.

### Temporary Phone Numbers

Temporary numbers can be issued as part of a port-in request. This would not typically be the case for a port-in within the United States, but may be needed in EMEA, where the port is a lengthier (1 week+) process. Values are:

- *Optional*
- *Never*
- *Always*

### PAC Required (Port-in Authorization Code)

Indicates if a PAC must be entered as part of the port in information. These codes are required in most EMEA countries, but are not required in the United States.

### \*Port In Cancellations

Indicate at which point in the port in process a cancellation of the port-in order may take place. A carrier may have rules about when they will allow you to cancel a port-in order. The values to choose from are as follows.

*Always allow cancel* — A cancellation may be attempted at any point in the port in process. This does not mean the cancellation will be successful, as the number may have already been ported at the time the cancellation is requested.

*Cancel until products ship* — Allow for a cancellation until a product on the order has been shipped.

*Never allow cancel* — At no time will a cancellation be allowed.

*Until port-in date agreed* — Allow for a cancellation up until the point where the original wireless provider has agreed to the port in date.

**OCN** This is the Operating Company Number of the new service provider requesting the port in. When the new local service provider is a reseller and they do not have an OCN, the value of “ZZZZ” should be used.

**Default Port-In Days** Enter the number of days to add to the current date to default the Port-In date

**Network ID** This field indicates the NPAC managed service provider ID of the new service provider requesting the port in.

## Prepaid Accounts

**Prepaid Accounts Allowed** This will control whether the enterprise will support the ordering and management of prepaid services and accounts.

An anonymous consumer can be created and used with Prepaid accounts. This user is associated to the system through Communications Setup. Once the Prepaid customer has been identified to the system, it can be used when ordering prepaid accounts and services. Fundamentally a prepaid service does not need a 'real' customer. A Prepaid Consumer is created in the CDM and associated to the system in the Communications Setup. The Order can use this customer when a Prepaid Service order is placed and the customer is not identified. It has a fake Bill To, and Sold To, and has the Billing Account Administrator relationship to ensure the user can create accounts.

See [Chapter 10, “Using Order Capture and Service Management in the Communications Industry,” page 171.](#)

The Order can use this customer when a Prepaid Service order is placed and the customer is not identified only when the order is coming from a Storefront. If the Source of the order is anything else, the order needs to be fulfilled and a real customer must be used.

**Threshold Amount** Defines the default Threshold dollar amount for a Prepaid Account. When creating a prepaid account, it can be set up to automatically add money when the account balance falls below a certain dollar amount. That is the Threshold dollar amount.

**Auto Load** The CSP Admin may want to set up whether or not the default Prepaid Customer should automatically be loaded in when using Add Prepaid Service from the 360-degree view. A Storefront may want to have the Prepaid Customer pre-loaded with each prepaid service order. However, a call center would not.

**Do Not Contact** A default setting for whether or not the Do Not Contact setting in CDM should be set for new customers created on a Prepaid order.

**Security Question** The CSP Admin may want to set up a default for the Security Question for the Prepaid Account. This security question and its answer appear when the order is taken and when the customer calls in after the order is fulfilled. Since customer information may not have been taken at order time, this security question and answer help confirm the consumer owns the account.

## Wireless Service Provider

Enter the wireless service providers from which you will allow customers to port in mobile numbers.

<b>Provider ID</b>	This user defined value identifies a wireless service provider such that it may be selected while entering the port in information. For example, you may enter <i>VERIZON</i> as the Provider ID for Verizon Wireless.
<b>*Status</b>	Indicates if this service provider is active or inactive. Only active service providers may be selected when entering port in information.
<b>Description</b>	Enter the description to be displayed on the port in information page.
<b>Contact Name</b>	This is a contact person at the donor service provider who could be contacted if issues arise during the porting process.
<b>Network ID</b>	This field indicates the NPAC managed service provider ID of the donor service provider.
<b>OCN (Operating Company Number)</b>	The OCN of the donor service provider. This value, along with the Network ID will identify the donor service provider in external EIP communications.
<b>Automatic</b>	When Automatic validation is selected, the port in information may be communicated to external systems via Enterprise Integration Points. The validation methods chosen here will be displayed on the port in information page, and the CSR may select a method as appropriate to their actions. Automatic validation is the default when enabled.
<b>Fax Number</b>	This is the fax number used in fax communications relating to the port in process. This checkbox should be checked when port ins may be instantiated / validated via fax.
<b>Phone</b>	This is the phone number used to communicate information relating to the port in process. The checkbox should be checked if port ins may be instantiated / validated over the phone.
<b>Website URL</b>	This is the website address to be used when manually entering information relating to the port in process. The checkbox should be checked if port ins may be instantiated / validated through a website.

### Phone Number and SIM Assignment on Order

<b>Source Code</b>	Values include <i>CTI, Fax, Phone, Self-Service, and Storefront</i> .
<b>Phone Number required</b>	Determines if the Assign Number link should be displayed on the Line Summary grid.
<b>Auto-Default Phone Number</b>	This field automatically assigns a phone number to services that require a phone number. This checkbox is accessible if Phone Number Required checkbox is selected.
<b>SIM Number required</b>	This field determines if the Assign SIM link should be displayed on the Line Summary grid. For example, a Call Center user will not enter a SIM number whereas a storefront user must enter a SIM number.

### Service Management

The Service Management setup definition is used by business processes defined for Service Management. Business processes, depending on the Action and the Action Reason, can create a Sales Lead and/or send notification.

<b>Line Action</b>	Values for line actions include <i>Activate, Add, Change, Change Attribute, Change Phone, Charge, Disconnect, New Order, Remove, Renew, Resume, Suspend,</i> and <i>Suspend/Change</i> . Line actions are setup in the Order Capture Setup Workbench.
<b>Reason</b>	Defines the reason associated with the action.
<b>Create Lead</b>	This check box defines if a sales lead needs to be created.
<b>Delay Lead in Days</b>	Defines the delay in days for creating the sales lead.
<b>Send Email</b>	Select if an email needs to be sent.
<b>Delay Email in Days</b>	Define the delay in days for sending an email.
<b>Email Template</b>	Define the email template used to compose the email.

See [Chapter 10, “Using Order Capture and Service Management in the Communications Industry,” page 171](#).

### **Customer-Supplied Handset**

<b>Product ID</b>	Define the product ID for Customer supplied handset. The Service Provider can capture and track the IMEI or the serial number of the handsets not supplied by the provider.
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## CHAPTER 4

# Setting Up PeopleSoft Order Capture

This chapter provides overviews of Order Capture setup, toolbar configuration, and application class set creation; lists common elements; and discusses how to:

- Set up Order Capture tables.
- Define order and quote processing.
- Define integrations and mappings.
- Set up credit card integration.
- Set up freight integration.
- Define tax installation options.

---

## Understanding Order Capture Setup

Order Capture is configurable and supports industry solutions without a need to modify application logic. This is achieved through configuration of the order capture entry forms and order capture business processing logic. Order maintenance functionality, in particular, requires configuration capabilities to enable you to determine the states at which an order capture is eligible for maintenance (change or cancellation).

The majority of Order Capture setup is performed in three individual workbenches:

- Setup
- Capture Type
- Integration

After you define toolbar preferences, create application class sets, and set up third-party integrations, you can perform all the remaining setup tasks here as well.

The three workbenches bring together most setup elements. Together, they enable configuration of the capture forms and the business logic. You can configure workbenches by capture type, such as order, quote, and service management. Capture types can take on different forms and different business processing logic depending upon the events you select, their sequence, and the business process or business project that you specify for each.

In addition, business logic can be processed entirely within the PeopleSoft environment, externally, or both. Depending on the order capture event and the CRM product, you can process some or all of the order capture logic using the web services of a distributed computing environment rather than calling or creating internally executing PeopleSoft business projects. PeopleSoft delivers order capture transactions that link to business processes that call web services, to perform tasks such as order submission, service cancellation, and order status update. If you are implementing or upgrading PeopleSoft Service Management, especially for telecommunication services, you will incorporate web services into your order capture setup, as there are no business projects for some of the service management tasks.

See Working with Services Management for more information.

You can configure and control order maintenance activities by capture status, at both the header and the line levels. Aesthetics are also controlled here, as you also configure presentation and labeling of capture forms by type.

---

**Note.** Although these workbenches combine both mandatory and optional steps, you are not *required* to perform any setup steps if you apply the delivered system data. This system data prepopulates all the workbench pages, and the values comprise all of the workbench settings that are necessary to get the Order Capture system up and running.

---

### See Also

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Working with Business Processes and Web Services”

[Appendix A, “Order Capture Delivered Business Processes and Web Services,” page 347](#)

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## Understanding Toolbar Configuration

You can configure the toolbar that you use for order and quote processing as well as the subtabs and page labels that appear on the order entry forms. The toolbar feature provides a simple way to navigate to different pages and sections within the same component. You can set up the toolbar so that, in an order form, users can jump from one area to another—such as from Billing on the Order Entry form to Interaction History on the History page—by selecting the relevant name.

This table summarizes toolbar configuration features:

Feature	Description
Toolbar buttons	Toolbar buttons include PeopleTools actions and Order Capture specific actions. Buttons such as Save, Refresh, Add, Next in List, Previous in List, Return to Search, and Update/Display map to corresponding buttons in PeopleTools. Order Capture buttons perform application-specific actions, such as cloning an order.
Page subtabs	Page subtabs are links that appear on a component page above the toolbar. Each subtab links to sections of a page that are defined based on a page’s group boxes. In Order Capture, you can use page subtabs to provide users with quick access to different page sections and to control the availability of information on a page.

Feature	Description
Toolbar configuration	You can choose the toolbar elements that appear and arrange them in any sequence. You can also modify the definitions of the delivered toolbar buttons or use application classes to create new buttons.
Personalization by end user	Order Capture users, such as customer service representatives (CSRs), can personalize the toolbar by selecting which buttons appear on it. Personalized configurations are associated with user IDs and do not affect the base toolbar definition. As an administrator, during setup, you decide whether users can personalize toolbars and specify the buttons in the toolbar that these users can hide in the personalization process.

### See Also

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

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## Understanding Application Class Set Creation

Order Capture uses the application class registry to store references to processing logic. Existing Order Capture application classes handle processing for the main order and quote classes, as well as industry-specific extensions.

To register, or create, classes, you must enter the full class path into the application class registry. After the system stores this information, you can dynamically instantiate the class through PeopleCode. The registry enables you to create subclasses of the main class and substitute these classes for the main class. Order Capture uses this registry to dynamically invoke the logic that is required for each capture type. PeopleSoft Customer Relationship Management (PeopleSoft CRM) industry-specific applications invoke different logic from Order Capture. You can create and register additional classes without modifying the delivered extensions.

---

## Common Elements Used in This Chapter



Click to clone a workbench page to a different setID.



Click to proceed to the next item in the list.



Click to return to the previous item in the list.



Click to return to the main page.

---

## Setting Up Order Capture Tables

To set up Order Capture tables, use then Capture Setup Tables (RO\_DEFN) component

This section provides an overview of multichannel framework (MCF) types, lists common elements, and discusses how to:

- Access Order Capture setup tables.
- Define charge frequencies.
- Define charge types.
- Create data event handlers.
- Create dynamic events.
- Define hold codes.
- Define reason codes.
- Define header statuses.
- Create line actions.
- Create line status types.
- Create line statuses.
- Create line statuses dropdowns.
- Define MCF types.
- Define note origins.
- Define note types.
- Create note visibility.
- Define priorities.
- Define source codes.
- Define frequency mappings.

## Understanding MCF Types

Order Capture enables communication with customers from within the application. Order Capture can also send communications automatically when an order or quote is submitted or maintained. To do this, you must define correspondence templates and packages in advance. PeopleSoft delivers sample Order Confirmation, Quote Confirmation, and Order Maintenance templates and packages.

Specific Order Capture MCF templates are marked for use with print correspondence, email correspondence, or both. Use these templates to generate email or print notifications from key transactions, such as an order or quote.

---

**Note.** Order Capture templates contain both static text and tokens. Tokens represent key data (product ID, price, order ID, and so on) from the Order Capture system.

---

Order Capture delivers these sample MCF templates for major transactions:

- Order Confirmation.

- Quote Confirmation.
- Order Maintenance.
- Order Status.

---

**Note.** This correspondence package is used only when automatically responding to a structured email that was sent from an external source.

---

- Order Status Failed.

---

**Note.** This correspondence package is used only when responding to an invalid structured email request.

---

You can define additional MCF types for Order Capture on the MCF Types (multichannel framework types) page.

## Common Elements Used in This Section

**Application Class ID** Enter the PeopleTools application class ID that is stored in the PSAPPCLASSDEFN table.

**Package Tree Viewer** Click to access the Application Packages Lookup page and select an application class. The system populates the Application Class ID and Application Class Path fields according to the class that you select.

---

**Note.** This is the highest-level package that contains this class. You can retrieve values through the Application Package Designer.

---

## Pages Used to Set Up Order Capture Tables

Page Name	Object Name	Navigation	Usage
Capture Setup Tables - Workbench	RO_DEFN	Set Up CRM, Product Related, Order Capture, Setup Workbench, Capture Setup Tables	Access Order Capture setup tables.
Capture Setup Tables - Charge Frequencies	RO_DEFN_CHGFREQ	Click the Charge Frequencies link on the Capture Setup Tables - Workbench page.	Define charge frequencies.
Capture Setup Tables - Charge Types	RO_DEFN_CHGTYPE	Click the Charge Types link on the Capture Setup Tables - Workbench page.	Define charge types.
Capture Setup Tables - Data Event Handlers	RO_DEFN_DATAELM	Click the Data Event Handlers link on the Capture Setup Tables - Workbench page.	Create data event handlers. Here you define application class references that are dynamically called for the purpose of auditing system and user actions. These references also control the processing for order maintenance.

<b>Page Name</b>	<b>Object Name</b>	<b>Navigation</b>	<b>Usage</b>
Capture Setup Tables - Hold Codes	RO_DEFN_HOLD	Click the Hold Codes link on the Capture Setup Tables - Workbench page.	Define hold codes.
Capture Setup Tables - Reason Codes	RO_DEFN_HLD_DEN	Click the Reason Codes link on the Capture Setup Tables - Workbench page.	Define reason codes.
Capture Setup Tables - Dynamic Events	RO_DEFN_DYEVENT	Click the Dynamic Events link on the Capture Setup Tables - Workbench page.	Create dynamic events. Define application class references that are dynamically called for the purpose of providing plug-and-play processing during component processing.
Capture Setup Tables - Header Statuses	RO_DEFN_HDSTAT	Click the Header Statuses link on the Capture Setup Tables - Workbench page.	Define header statuses that correspond with your business process.
Capture Setup Tables - Line Actions	RO_DEFN_LNACTN	Click the Line Actions link on the Capture Setup Tables - Workbench page.	Create line actions such as Add, Remove, and Suspend. Capture type lines use these actions.
Capture Setup Tables - Line Status Types	RO_DEFN_LS_TYPE	Click the Line Status Types link on the Capture Setup Tables - Workbench page.	View or edit engagement service line status types.
Capture Setup Tables - Line Statuses	RO_DEFN_LNSTAT	Click the Line Statuses link on the Capture Setup Tables - Workbench page.	Create line statuses that correspond with your business processes.
Capture Setup Tables - Line Statuses DropDowns	RO_DEFN_LNPRMPT	Click the Line Status DropDowns link on the Capture Setup Tables - Workbench page.	Control or view the dropdowns available for your engagement service products.
Capture Setup Tables - MCF Types	RO_DEFN_MCFTYPE	Click the MCF Types link on the Capture Setup Tables - Workbench page.	Define MCF types, such as print or email.
Capture Setup Tables - Note Origins	RO_DEFN_NOTORIG	Click the Note Origins link on the Capture Setup Tables - Workbench page.	Define note origins.
Capture Setup Tables - Note Types	RO_DEFN_NOTTYPE	Click the Note Types link on the Capture Setup Tables - Workbench page.	Define note types.
Capture Setup Tables - Note Visibility	RO_DEFN_NOTVSBL	Click the Note Visibility link on the Capture Setup Tables - Workbench page.	Create note visibility.
Capture Setup Tables - Priorities	RO_DEFN_PRIORITY	Click the Priorities link on the Capture Setup Tables - Workbench page.	Define priorities for orders.

Page Name	Object Name	Navigation	Usage
Capture Setup Tables - Source Codes	RO_DEFN_SOURCE	Click the Source Codes link on the Capture Setup Tables - Workbench page.	Define source codes—such as phone, web, and fax—for inbound capture requests.
Capture Setup Tables - Frequency Mappings	RO_DEFN_SCHDMAP	Click the Frequency Mappings link on the Capture Setup Tables - Workbench page.	Map recurring price frequency in PeopleSoft CRM to a schedule in PeopleSoft Contracts.

## Accessing Order Capture Setup Tables

Access the Capture Setup Tables - Workbench page.

### Capture Setup Tables

#### Workbench

Save | Refresh | Clone | Search | Next | Previous | Workbench

**Description** Core Setup Data **SetID** SHARE

This workbench allows users to view a summary of all the setup tables required for the Order Capture application. Click the details link to add or update specific setup data.

#### Workbench Details

\***Description**

#### Workbench Steps

Details	Progress
<a href="#">4: Data Event Handlers</a>	16 Data Event Handlers
<a href="#">5: Dynamic Events</a>	4 Dynamic Events
<a href="#">6: Frequency Mappings</a>	3 Frequency Mappings
<a href="#">7: Header Statuses</a>	12 Header Statuses
<a href="#">8: Hold Codes</a>	53 Hold Codes
<a href="#">9: Line Actions</a>	2 Line Actions
<a href="#">10: Line Status Types</a>	2 Line Status Types
<a href="#">11: Line Statuses</a>	36 Line Statuses
<a href="#">12: Line Statuses DropDown</a>	9 Line Statuses DropDown
<a href="#">13: MCF Types</a>	6 MCF Types
<a href="#">14: Note Origins</a>	5 Note Origins
<a href="#">15: Note Types</a>	11 Note Types
<a href="#">16: Note Visibility</a>	3 Note Visibility
<a href="#">17: Priorities</a>	4 Priorities
<a href="#">18: Reason Codes</a>	12 Reason Codes
<a href="#">19: Source Codes</a>	5 Source Codes

Capture Setup Tables - Workbench page

**Note.** You enter a setID in order to view this page in Add mode.

**Details** Click the link in the Details column to view, create, or modify values for each Order Capture setup table.

**Progress** In the Progress column, the system displays the number of rows of data defined for each of the steps listed in the details column.

## Defining Charge Frequencies

Access the Capture Setup Tables - Charge Frequencies page.

The screenshot displays the 'Capture Setup Tables - Charge Frequencies' page. At the top, there are navigation buttons: Save, Refresh, Clone, Search, Next, Previous, Workbench, and Personalize. Below these is a breadcrumb trail: Description Core Setup Data SetID SHARE. The main table is titled 'Charge Frequencies' and has columns for 'Charge Frequency' and '\*Description'. The table contains five rows of data, each with plus and minus icons for editing.

Charge Frequency	*Description		
1 DAY	Daily	+	-
2 MNTH	Monthly	+	-
3 ONCE	One Time	+	-
4 WEEK	Weekly	+	-
5 YEAR	Yearly	+	-

Capture Setup Tables - Charge Frequencies page

Charge frequencies are defined per product, and they represent the frequency of a recurring charge. In Order Capture, these frequencies appear on the order entry form in the Totals section.

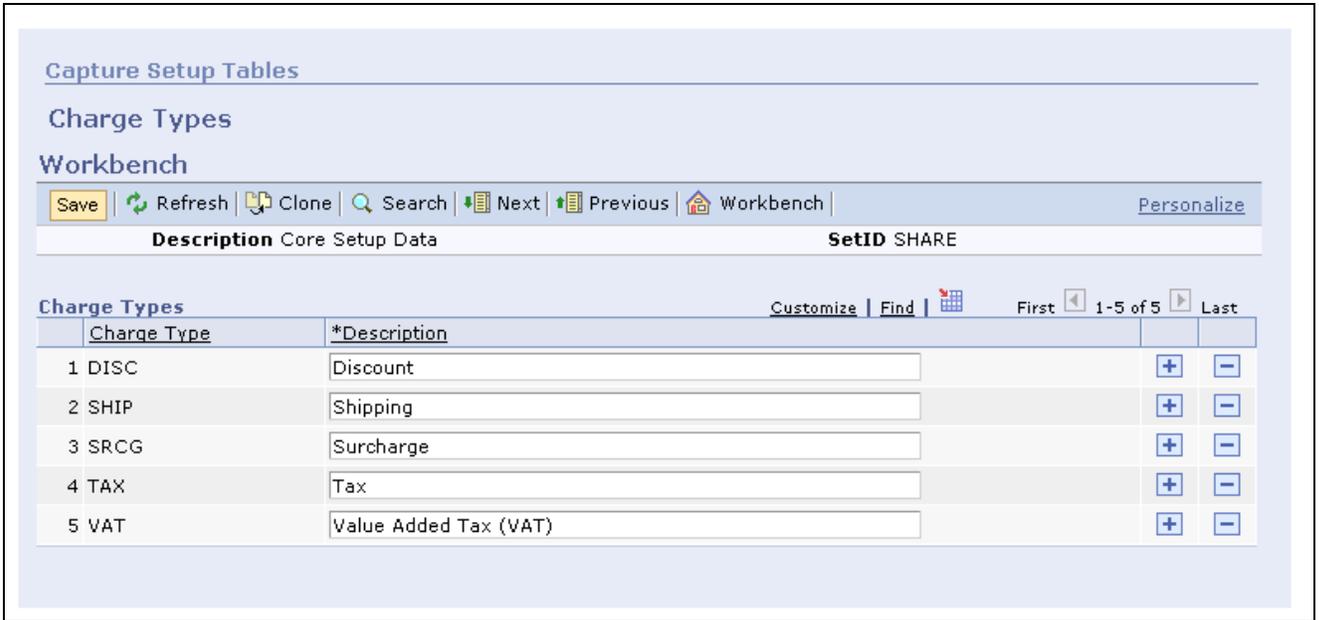
**Note.** If you define a recurring price and charge frequency for a product in a price list or in the product model, then that frequency and recurring price also appear in the Totals section of the order entry form.

**Charge Frequency** Displays the code for the frequency of the recurring charge.

**Description** Displays the description of the recurring charge's frequency. This field is visible to the end user.

## Defining Charge Types

Access the Capture Setup Tables - Charge Types page.



Capture Setup Tables - Charge Types page

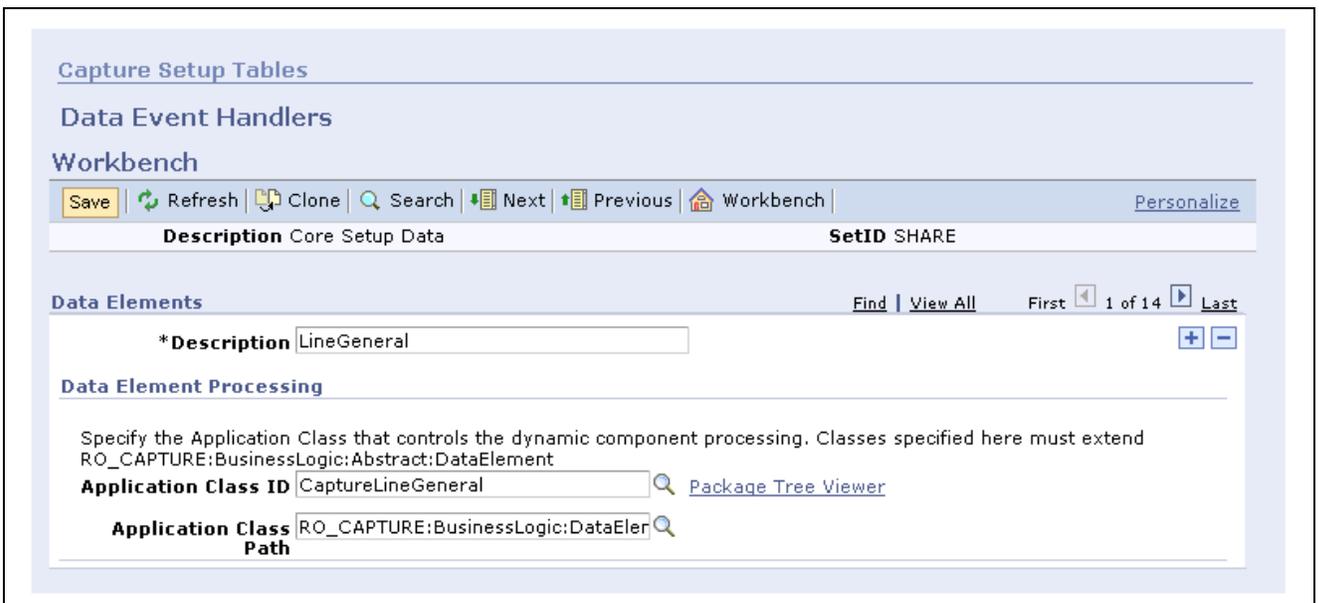
In Order Capture, charge types appear in the Totals section of the order entry form. Charge types are additional charges or discounts (such as shipping and taxes) that are applied to the order.

**Charge Type**                      Displays the system code for the charge type.

**Description**                      Displays the description of the charge type. This field is visible to the user.

## Creating Data Event Handlers

Access the Capture Setup Tables - Data Event Handlers page.



Capture Setup Tables - Data Event Handlers page

## See Also

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

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Working with Business Processes and Web Services”

[Appendix A, “Order Capture Delivered Business Processes and Web Services,” page 347](#)

## Defining Hold Codes

Access the Capture Setup Tables - Hold Codes page.

**Capture Setup Tables**

**Hold Codes**

**Workbench**

Save Refresh Clone Search Next Previous Workbench Personalize

**Description** Core Setup Data **SetID** SHARE

**Hold Codes** Find View All First 1 of 40 Last

**Hold Code** ADRBIL + -

**\*Level** Header  **Allow Manual Change To Status**

**\*Description** Bill to address is inactive

**Long Description** Hold triggered when the bill to address is inactive.

**Applies To**

- Non-partner orders placed by an enterprise user
- Partner orders placed by an enterprise user
- Orders placed by partner user

**Hold Processing**

Specify the Application Class that controls the processing for this hold. Classes specified here must extend RO\_CAPTURE:BusinessLogic:Abstract:HoldValidation

**Application Class ID** BillToAddressHold [Package Tree Viewer](#)

**Application Class Path** RO\_CAPTURE\_TYPES:Core:HoldValida

Capture Setup Tables - Hold Codes page

Set up hold codes to create hold logic that executes when you submit a specific capture type for processing. These codes are created as extensions of a base hold validation class so that they are dynamically created and carried out. You can add configurable hold logic here without additional system configuration.

Add a new class in the RO\_CAPTURE\_TYPES application package for each hold code that you add. The new class performs the hold validation.

## Hold Codes

**Hold Code** Displays a unique code identifier.

- Level** Select the level of the capture data for which this hold is triggered. This determines the type of data that is passed to the hold check. If you select *Header*, the system evaluates header-level holds once per capture. If you select *Line*, the system evaluates line-level holds once per capture line.
- Allow Manual Change To Status** Select to enable a user to manually change the status of (or remove) this hold when it is triggered. If the hold is absolutely required in this condition, clear this check box. For example, if a billing customer is not specified on an order, a CSR is not permitted to simply remove this hold; the CSR should perform a corrective action to remove the hold. In this example, the CSR must return to the order and specify a bill-to customer.

**Applies To**

You can define holds differently for the enterprise user (usually CSR), and the partner user, or where the order is placed on behalf of a partner. You can select any combination of the three offerings.

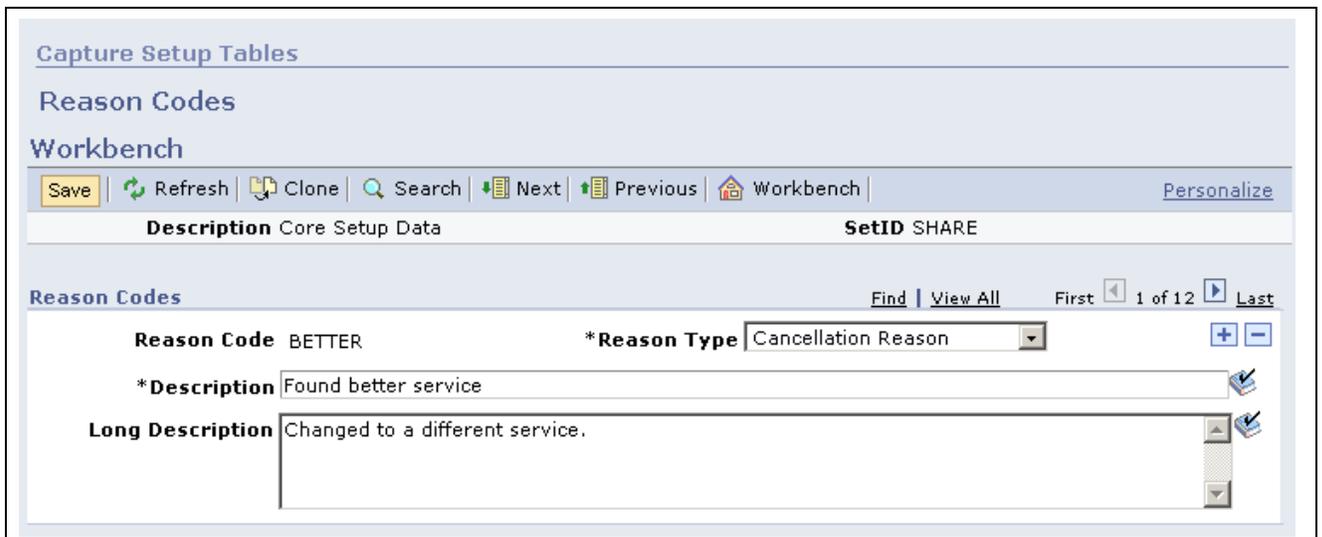
Select *Non-partner orders placed by an enterprise user* if you want to apply the defined holds to regular orders placed by a CSR or non-partner orders. Select *Partner orders placed by an enterprise user* if you want to apply the holds to orders entered on behalf of a partner. Select *Orders placed by partner user* to apply the holds to orders submitted by partners.

**See Also**

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

**Defining Reason Codes**

Access the Capture Setup Tables - Reason Codes page.



Capture Setup Tables - Reason Codes page

An enterprise can set up reason codes for specific actions that might occur. For example, when a hold is overridden or a service is cancelled, you should record a reason for the action.

- Reason Type** Select the type of action to which the reason code applies. Possible values are:

- *Cancellation Reason* The reason the service was cancelled. Cancellation reason codes appear in the Service Management application when the user selects the Cancel line action for a given service.
- *Hold Denial* The reason for rejecting holds on orders placed by or for a partner. Hold Denial reason codes are available during order entry.
- *Hold Override* The reason the hold was overridden. Hold Override reason codes appear in either Service Management or order entry when a hold is overridden.

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

## Creating Dynamic Events

Access the Capture Setup Tables - Dynamic Events page.

The screenshot shows the 'Capture Setup Tables - Dynamic Events' page. At the top, there's a header 'Capture Setup Tables' and a sub-header 'Dynamic Events'. Below this is a 'Workbench' area with several action buttons: Save, Refresh, Clone, Search, Next, Previous, Workbench, and Personalize. The main table has two columns: 'Description' and 'SetID'. The first row has 'Order Handler' in the Description column and 'SHARE' in the SetID column. Below the table, there's a 'Dynamic Event Processing' section. It contains a text box for '\*Description' with the value 'Order Handler'. Below that, there's a section titled 'Dynamic Event Processing' with a description: 'Specify the Application Class that controls the dynamic component processing. Classes specified here must extend RO\_CAPTURE:BusinessLogic:Abstract:DynamicEvent'. There are two input fields: 'Application Class ID' with the value 'OrderDynamicEvent' and a 'Package Tree Viewer' link, and 'Application Class Path' with the value 'RO\_CAPTURE\_TYPES:Core:BusinessL'.

Capture Setup Tables - Dynamic Events page

Dynamic events are application classes that are loaded during the component lifecycle. When you load the component, enter data, and save, the system loads these events and, based upon methods in these classes, carries out certain logic.

---

**Note.** You can use these classes to plug in new logic without configuring the existing application.

---

### See Also

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

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Business Process Management”

Appendix A, “Order Capture Delivered Business Processes and Web Services,” page 347

## Defining Header Statuses

Access the Capture Setup Tables - Header Statuses page.

Capture Setup Tables				
Header Statuses				
Workbench				
Save		Refresh	Clone	Search
Next		Previous	Workbench	
Description Core Setup Data			SetID SHARE	
Header Statuses				
Status	*Description	Allow Manual Change To Status		
1	1 Canceled	<input checked="" type="checkbox"/>	+	-
2	350 Generating	<input type="checkbox"/>	+	-
3	400 Generated	<input type="checkbox"/>	+	-
4	500 New	<input type="checkbox"/>	+	-
5	950 Queued	<input type="checkbox"/>	+	-
6	1000 Submitted	<input type="checkbox"/>	+	-
7	1500 Partial Hold	<input type="checkbox"/>	+	-
8	2000 In Fulfillment	<input type="checkbox"/>	+	-
9	3500 Fulfillment Hold	<input type="checkbox"/>	+	-
10	5000 Expired	<input type="checkbox"/>	+	-
11	6000 Complete	<input checked="" type="checkbox"/>	+	-
12	9000 Hold	<input type="checkbox"/>	+	-

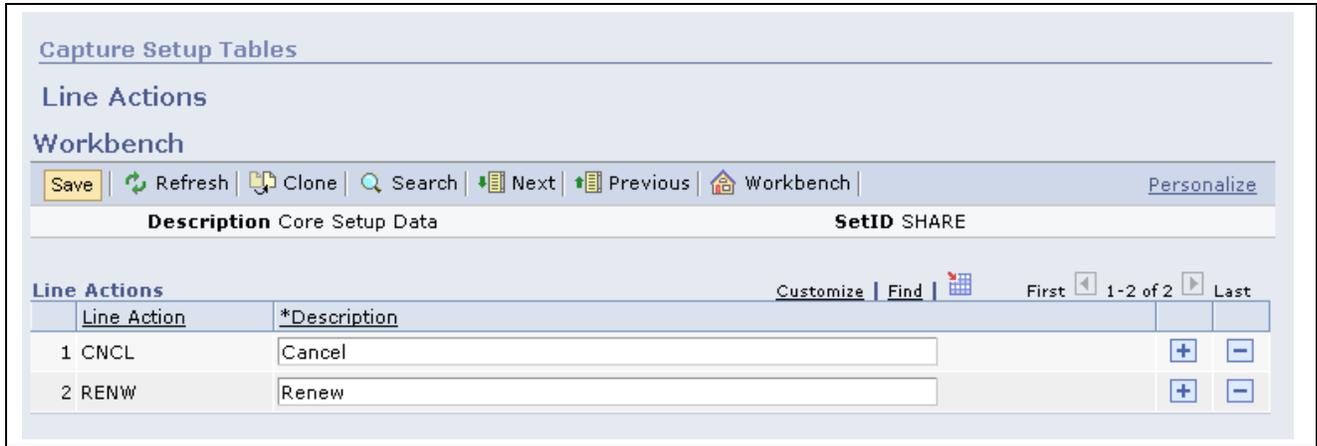
Capture Setup Tables - Header Statuses page

- Status** Displays the status code identifier for the header status.
- Description** Displays the description of the header status. This description is visible to CSRs and self-service users.
- Allow Manual Change To Status** Select to enable the CSR to make a manual change to this status during order entry.

**Note.** Since a quote has an expiration date, a batch job examines the quote expiration dates and assigns any expired quotes a new header status of *Expired*, or whatever you choose to call it here. This action also triggers an integration point to update any associated proposals in the PeopleSoft Proposal Management system to *Canceled*. The exception to this rule is, that if any other quote that is not expired has a reference to the same proposal ID, it is not cancelled in PeopleSoft Proposal Management. If an *Expired* quote is revised, the line status for the engagement status is reset to *Draft* and an integration point is automatically sent to PeopleSoft Proposal Management.

## Creating Line Actions

Access the Capture Setup Tables - Line Actions page.



Capture Setup Tables - Line Actions page

Primarily, use line actions to help manage service management transactions.

**Line Action** Displays the system code identifier for the line action.

**Description** Displays the description for the line action. This description is visible to the CSR.

## Creating Line Status Types

Access the Capture Setup Tables - Line Status Types page.



Capture Setup Tables - Line Status Types page

### Line Statuses

When entering quotes, the options for the quote lines depend on the line status. This page defines those status types. The *Engagement Service* line status type is used for engagement services products, and the *Default* line status type is used for any product that is not flagged as an engagement service product.

## Creating Line Statuses

Access the Capture Setup Tables - Line Statuses page.

Capture Setup Tables

Line Statuses

Workbench

Save Refresh Clone Search Next Previous Workbench Personalize

Description Core Setup Data SetID SHARE

Line Statuses Customize Find First 1-18 of 18 Last

Status	*Description		
1	1 Canceled	+	-
2	1000 Open	+	-
3	1030 Priced	+	-
4	1050 Sold	+	-
5	1100 Partially Open	+	-
6	2000 Backordered	+	-
7	2100 Partially Backordered	+	-
8	3500 Fulfillment Hold	+	-
9	3600 Partial Fulfillment Hold	+	-
10	4000 In Fulfillment	+	-
11	4100 Partially In Fulfillment	+	-
12	5000 Picked	+	-
13	5100 Partially Picked	+	-
14	6000 Shipped	+	-
15	6010 Complete	+	-
16	6100 Partially Shipped	+	-
17	9000 On Hold	+	-
18	9100 Partially On Hold	+	-

Capture Setup Tables - Line Statuses page

## Line Statuses

**Status** Displays the unique numeric code identifier for the line status.

**Description** Displays the description for the line status. This description is visible to the CSR.

**Note.** There are six line statuses specifically designed for engagement services. These line statuses appear on the Entry Form page, and they map to corresponding statuses in PeopleSoft Proposal Management. You can edit the names of these statuses on this page.

## Defining Line Statuses Drop Downs

Access the Capture Setup Tables - Line Statuses DropDown page.

**Capture Setup Tables**

**Line Statuses DropDown**

**Workbench**

Save | Refresh | Clone | Search | Next | Previous | Workbench | Personalize

**Description** Core Setup Data **SetID** SHARE

**Line Statuses** Customize | Find | First 1-9 of 9 Last

	*Status Type	*From Status	To Status		
1	Engagement Service	--- Any ---	Canceled	+	-
2	Engagement Service	Canceled	Draft	+	-
3	Engagement Service	Canceled	Lost	+	-
4	Engagement Service	Priced	Negotiate	+	-
5	Engagement Service	Priced	Lost	+	-
6	Engagement Service	Negotiate	Lost	+	-
7	Engagement Service	Lost	Draft	+	-
8	Default	--- Any ---	Canceled	+	-
9	Default	Open	Complete	+	-

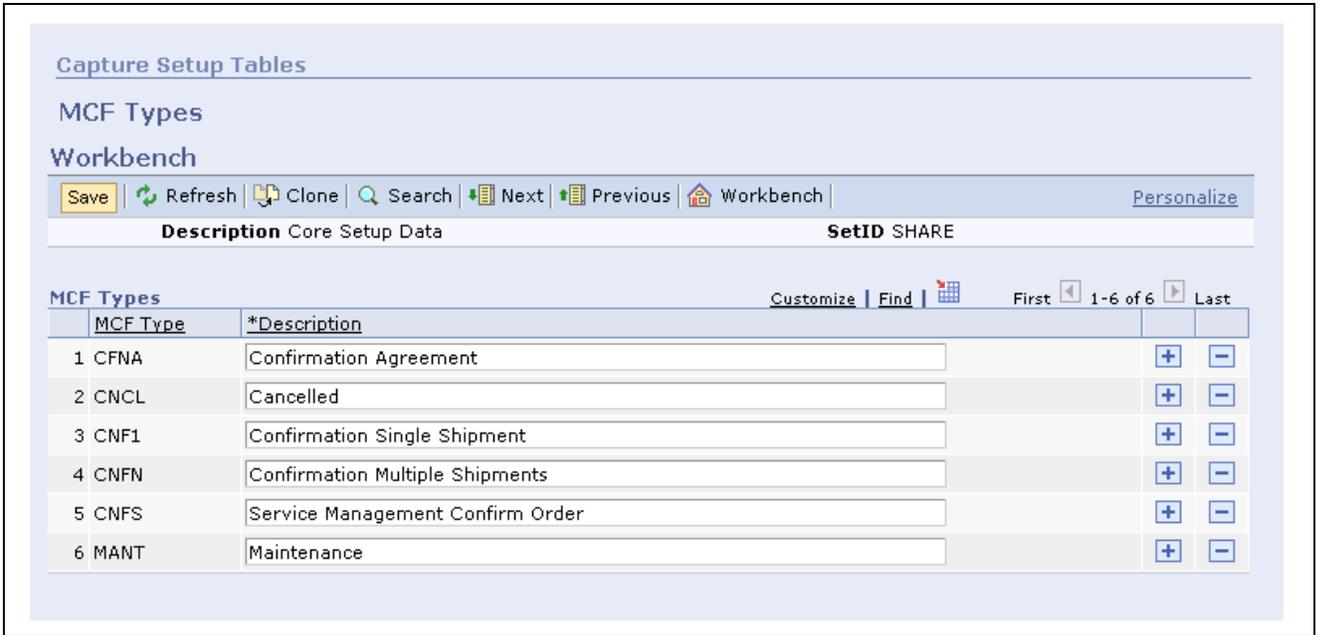
Capture Setup Tables - Line Statuses DropDowns page

The status types that you define on the Line Statuses page determines what appears on this page. Since PeopleSoft delivers *Engagement Service* and *Default*, you can specify alternative status dropdowns for each of these two types.

Order Capture uses data defined on this page to create the line status options on orders and uses the current line status to determine which statuses are available for selection.

## Defining MCF Types

Access the Capture Setup Tables - MCF Types page.

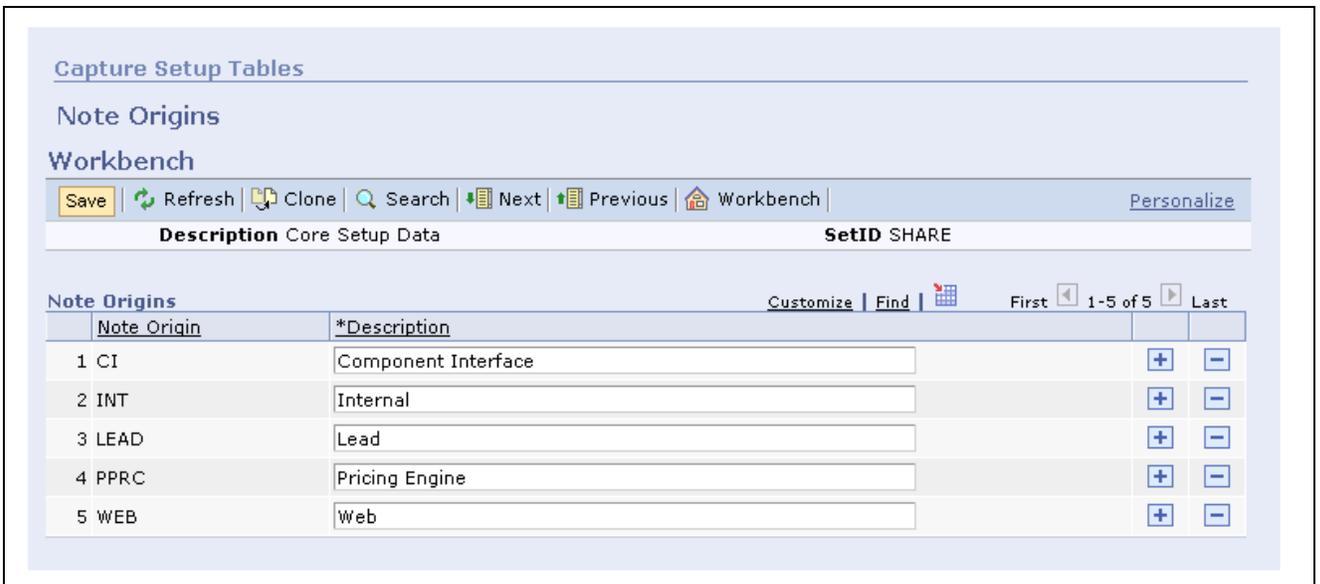


Capture Setup Tables - MCF Types page

**MCF Type** Displays a unique identifier for the MCF type of correspondence.

## Defining Note Origins

Access the Capture Setup Tables - Note Origins page.



Capture Setup Tables - Note Origins page

Note origins (descriptions) appear on the Notes tab of the order entry form. This note origin (description) is display-only and indicates the source of the note, such as *Internal* or *Web*.

**Note Origin** Displays the system code identifier for the note origin.

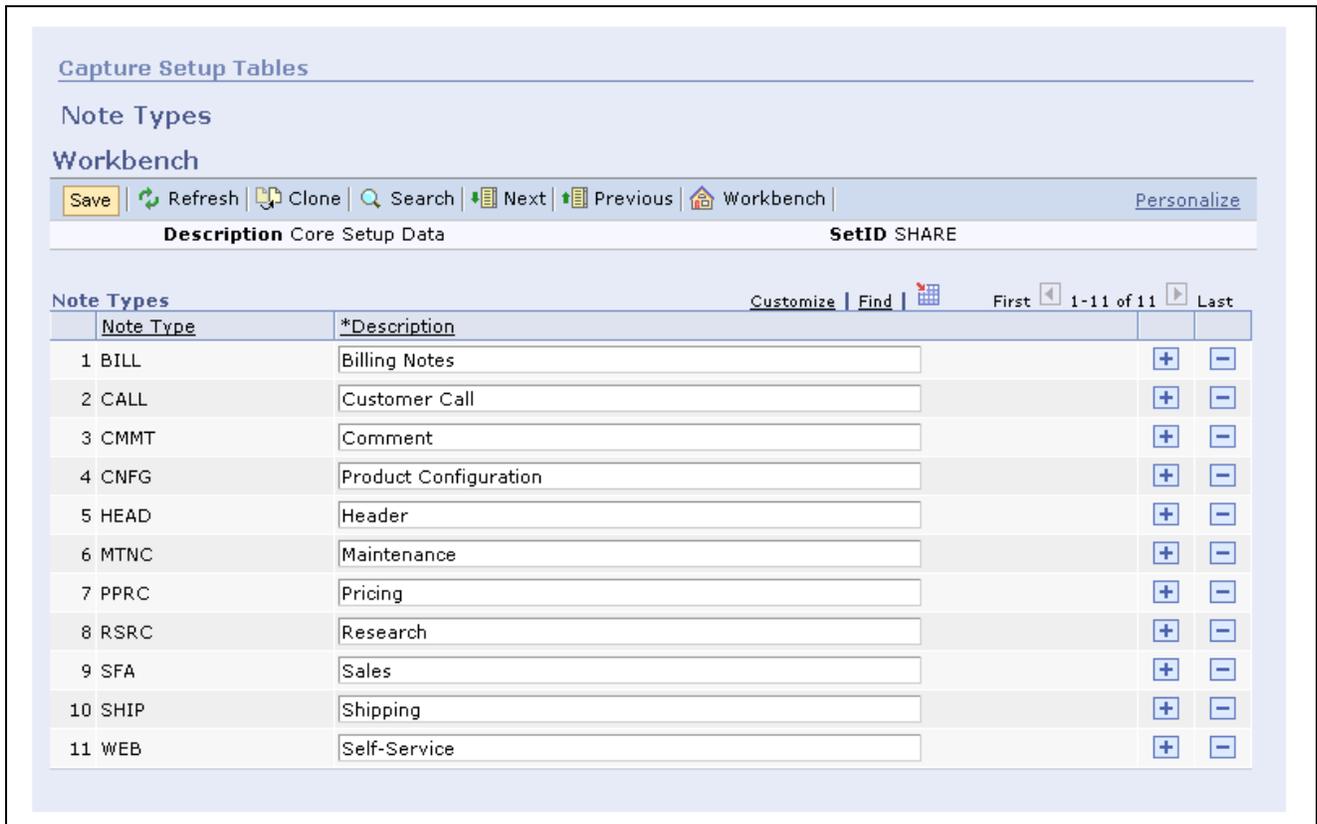
**Description** Displays the description for the note origin. This description is visible to the CSR.

**See Also**

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Notes and Attachments” Chapter 13, “Managing Orders and Quotes,” Adding and Viewing Notes and Attachments, page 264

**Defining Note Types**

Access the Capture Setup Tables - Note Types page.



Capture Setup Tables - Note Types page

Note types appear in the Note Types drop-down list box on the Notes tab of the order entry form.

**Note Type** Displays the system code identifier for the note type.

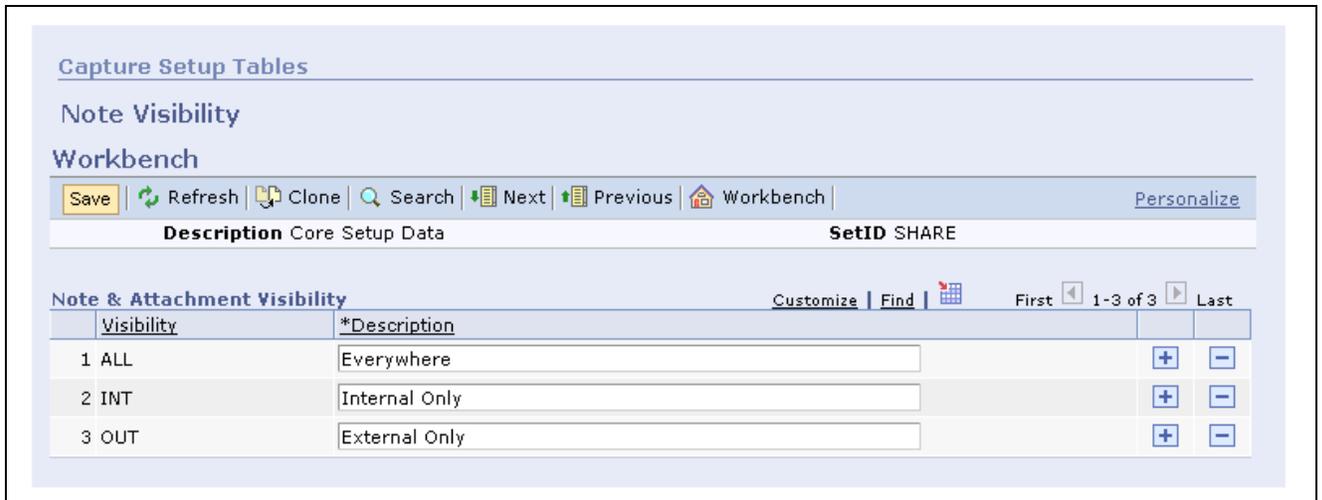
**Description** Displays the description for the note type. This description is visible to the CSR.

**See Also**

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Notes and Attachments” Chapter 13, “Managing Orders and Quotes,” Adding and Viewing Notes and Attachments, page 264

**Creating Note Visibility**

Access the Capture Setup Tables - Note Visibility page.



Capture Setup Tables - Note Visibility page

Note visibility appears in the Visibility field of the Notes tab of the order entry form. It controls who can see the note, and it applies equally to notes and attachments. A note can be visible internally to CSRs or externally to Order Capture Self Service users. For example, if the CSR sets the visibility of a note to *Internal Only*, the self-service user cannot see the note. For attachments, a separate drop-down list box appears when an attachment is added to the order. This field contains the same visibility descriptions.

**Visibility** Displays the system code identifier for note and attachment visibility.

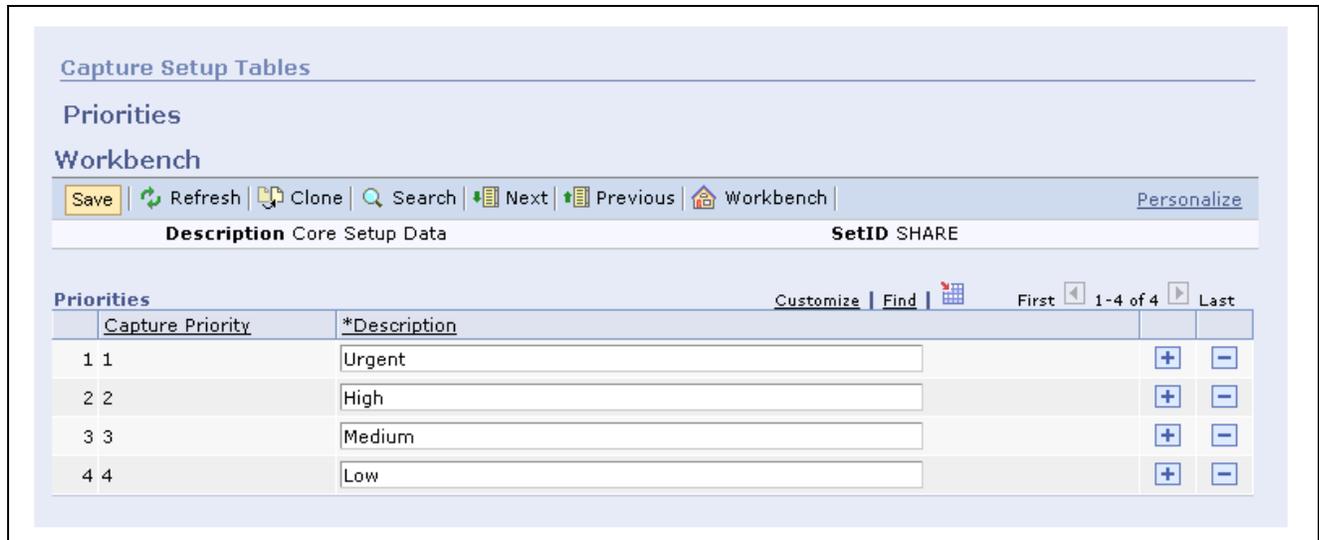
**Description** Displays the description for note and attachment visibility. This description is visible to the CSR.

**See Also**

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Notes and Attachments” Chapter 13, “Managing Orders and Quotes,” Adding and Viewing Notes and Attachments, page 264

**Defining Priorities**

Access the Capture Setup Tables - Priorities page.



Capture Setup Tables - Priorities page

Priority descriptions appear in the header details of the entry form for Order Capture. They contain no processing logic; they are for informational purposes only.

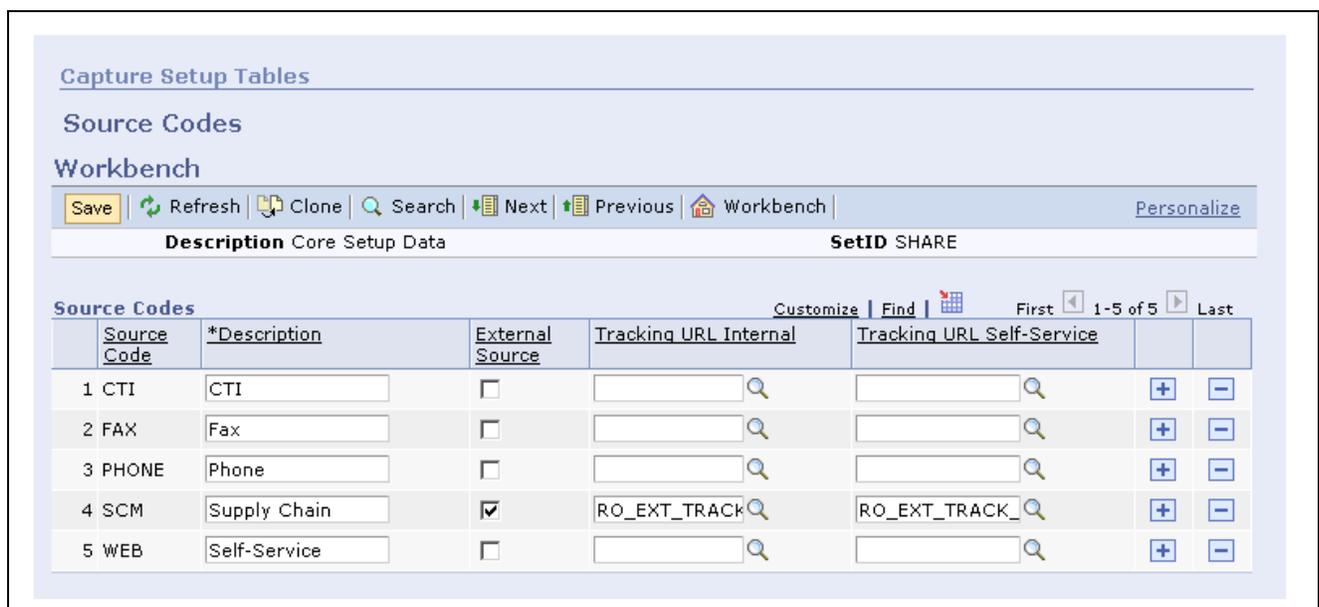
Third-party fulfillment systems can use priorities to determine processing order.

**Capture Priority** Displays the system code identifier for the capture priority.

**Description** Displays the description of the capture priority. This description is visible to the CSR.

## Defining Source Codes

Access the Capture Setup Tables - Source Codes page.



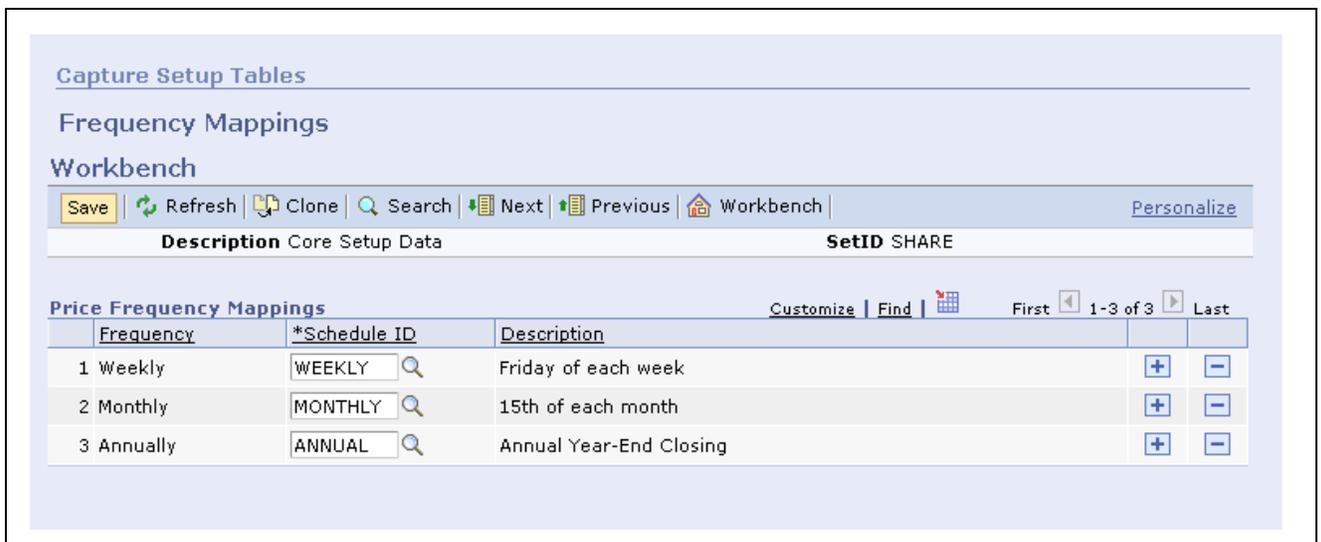
Capture Setup Tables - Source Codes page

Source codes indicate the origin of an order or quote, and their descriptions appear in a drop-down list box in the header details of the entry form.

- External Source** Select if the order originated from an external system source. For example, you may have another system that generates orders. This option enables you to migrate these orders into Order Capture so that you can view all of the orders for a particular customer through a single application.
- Tracking URL Internal**  
(tracking uniform resource locator internal) Enter a uniform resource locator (URL) for Order Capture to view a summary of the externally created orders. When CSRs search for orders or quotes and click one of these externally sourced orders, they are transferred to this URL to view the orders.
- Tracking URL Self-Service**  
(tracking uniform resource locator self-service) Enter a URL for Order Capture Self Service to view a summary of the externally created orders. When users search for orders or quotes in Order Capture Self Service, they are transferred to this URL to view the orders.

## Defining Frequency Mappings

Access the Capture Setup Tables - Frequency Mappings page.



Capture Setup Tables - Frequency Mappings page

### Price Frequency Mappings

- Frequency** Select the relevant PeopleSoft CRM pricing frequency for the schedule that you defined in PeopleSoft Contracts.
- Schedule ID** Enter the Schedule ID for purposes of the integration with PeopleSoft Contracts. Schedule ID determines how many billing transactions will be created. PeopleSoft Contracts only supports weekly, monthly, or annual schedule types.

---

**Note.** Schedule ID is synchronized from PeopleSoft Financials Management to CRM. It determines the number of billing transactions that are created in PeopleSoft Billing. For example, if a service was \$10 per month and was valid for one year, we would want twelve \$10 charges to be applied to that customer. This does not mean that the customer is billed twelve times but only that there will be twelve bill lines for that customer. If you bill monthly, then each bill will have one line. If you bill yearly, then each bill will have twelve lines.

---

## See Also

*PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook*, “Transaction Billing Processor Integration”

*PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook*, “Setting Up an Integration to the Transaction Billing Processor”

PeopleSoft Financials, Enterprise Service Automation and Supply Chain Management Application Fundamentals 9 PeopleBook, Defining Financials and Supply Chain Management Common Definitions,” Defining Common Journal Definitions.

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## Defining Order and Quote Processing

To create type definitions, use the Type Definition (RO\_TYPE) component.

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**Note.** In this workbench, you apply data from the Setup Workbench to a specific capture type.

---

This section discusses how to:

- Create type definitions.
- Define hold processing.
- Define business process conditions.
- Define audit events.
- Define maintenance setup.
- Define dynamic events.
- Define MCF types.
- Define process types.

## Pages Used to Define Order and Quote Processing

Page Name	Object Name	Navigation	Usage
Type Definition - Workbench page	RO_TYPE	Set Up CRM, Product Related, Order Capture, Capture Type Workbench, Type Definition	Create type definitions for the Order, Quote, and Order Copy capture types.
Type Definition - Hold Processing	RO_TYPE_HOLD	Click the Hold Processing link on the Type Definition - Workbench page.	Define hold processing for the capture type.
Type Definition - Business Process Conditions	RO_TYPE_BPEVENT	Click the Business Process Conditions link on the Type Definition - Workbench page.	Define business process conditions that fire for the capture type.
Type Definition - Audit Conditions	RO_TYPE_ADEVENT	Click the Audit Conditions link on the Type Definition - Workbench page.	Define audit events for the capture type.
Type Definition - Maintenance Conditions	RO_TYPE_DEEVEVENT	Click the Maintenance Conditions link on the Type Definition - Workbench page.	Define maintenance conditions by defining the data element events for the capture type. Data elements and their associated classes drive the maintenance and audit processing for the capture type.
Type Definition - Dynamic Events	RO_TYPE_DYEVEVENT	Click the Dynamic Events link on the Type Definition - Workbench page.	Define dynamic events for this capture type. Dynamic events allow for dynamic, pluggable processing for a capture type, using dynamic event classes.
Type Definition - MCF Types	RO_TYPE_MCFTYPE	Click the MCF Types link on the Type Definition - Workbench page.	Define MCF types that this capture type uses.
Type Definition - Process Types	RO_TYPE_PROCTYP	Click the Process Types link on the Type Definition - Workbench page.	Define process types for a capture type.
Build Condition	RO_TYPE_PHRASE	Click the Edit button for an event on the Type Definition - Business Process Conditions, Type Definition - Audit Conditions, or Type Definition - Maintenance page.	Search for and select the events that trigger business process, audits, or maintenance workflow.

## Creating Type Definitions

Access the Type Definition - Workbench page.

**Type Definition**

**Workbench**

Save | Refresh | Clone | Search | Next | Previous | Workbench | Personalize

**Capture Type** SO      **SetID** SHARE  
**Description** Order

This workbench is used to configure specific processing for a particular Capture type. Click the details link to add or update specific setup data.

**Workbench Details**

\***Description** Order      \***Fire From Status** Submitted  
 \***Real-time Status Rule** Upon Request Only      \***To Status** Complete  
 \***Application Class Set** Order Extensions       **Use Auto Numbering**  
 \***Display Template** Core Order Template

**Workbench Steps**

Details	Progress
1: Type Definition	8 of 8 required fields completed.
2: <a href="#">Hold Processing</a>	39 Hold Processing
3: <a href="#">Business Project Conditions</a>	5 Business Project Conditions
4: <a href="#">Audit Conditions</a>	4 Audit Conditions
5: <a href="#">Maintenance Conditions</a>	12 Maintenance Conditions
6: <a href="#">Dynamic Events</a>	3 Dynamic Events
7: <a href="#">MCF Types</a>	4 MCF Types
8: <a href="#">Process Types</a>	1 Process Types

**Modified**    02/10/2004 8:33PM PST    SAMPLE

Type Definition - Workbench page

Type Definition is the main workbench page for creating type definitions for the Order, Quote, and Order Copy capture types.

### Workbench Details

**Description**      Displays the description of the capture type. This appears during capture entry.

**Real-Time Status Rule**      Select when to invoke the real-time status integration point . Values are:

*Upon Request Only:* Invokes the integration point when the CSR clicks Refresh on the toolbar.

*Prior to Capture Status Only:* Invokes the integration point when the user searches and selects a capture.

*Capture Status and On Request:* Invokes the integration point when the user clicks Refresh and when the user searches and selects a capture.

*Do Not Fire.*

**Fire From Status**      Select the status at which the processing occurs, such as *Open* or *In Process*.

Statuses are identified by numeric status codes in the system. The selection here should represent the lowest numeric status code, which is the point at which the real-time status integration point fires.

<b>Application Class Set</b>	Select application class set extensions that the system created during the application class registry setup step. <i>Order Extensions</i> is the default class set for orders; <i>Quote Extensions</i> is the default class set for quotes.
<b>To Status</b>	Select the status at which the processing occurs, such as <i>Open</i> or <i>In Process</i> . Statuses are identified by numeric status codes in the system. The selection here should represent the highest numeric status code, which is the point at which the real-time status integration point fires.
<b>Use Auto Numbering</b>	Select to enable autonumbering schemas, which the system chooses based on capture type and setID. If the system does not use these schemas, then the CAPTURE_ID is generated using the PeopleTools UIDGen () built-in function.  See <i>PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook</i> , “Setting Up General Options,” Setting Up Automatic Numbering.
<b>Display Template</b>	Control the user interface of the runtime component (RO_CAPTURE) by selecting a display template. Before you can make a selection here, you must create a display template or modify an existing template. You can define a new display template for Order Capture by navigating to Set Up CRM, Common Definitions, Component Configuration, Display Template Definition. You can modify an existing template by navigating to Set Up CRM, Common Definitions, Component Configuration, Display Template Details.

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**Note.** Display templates allow for extensive configurability. For example, you can choose to divide the order entry form into sections and you can control the visibility of these sections (as well as the fields within the sections) from the display template. We deliver two display templates for Order Capture. These are CORE\_ORDER (Order Template) and CORE\_QUOTE (Display template for Quote). Since several industry-specific applications rely upon Order Capture, other display templates are also made available and those templates contain fields most relevant to that particular sector.

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See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up SmartViews,” Use of Templates.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up SmartViews,” Defining SmartView Templates.

## Workbench Steps

<b>Details</b>	Click a link in this column to view, create, or modify specific configurations for business processing logic.
<b>Progress</b>	Displays the number of steps completed from those that are available.

## Defining Hold Processing

Access the Type Definition - Hold Processing page.

**Type Definition**

**Hold Processing**

**Workbench**

Save Refresh Clone Search Next Previous Workbench Personalize

**Capture Type** SO **SetID** SHARE  
**Description** Order

Insert the holds that will process for this capture type.

**Hold Codes** Customize Find First 1-53 of 53 Last

Enabled	Hold Code	Description	Details
<input checked="" type="checkbox"/>	ADRBIL	Bill to address is inactive	Hold triggered when the bill to address is inactive.
<input checked="" type="checkbox"/>	ADRSHP	Ship to address is inactive	Hold is triggered when the ship to address is inactive.
<input checked="" type="checkbox"/>	ADRSIT	Site address is inactive	Hold triggered when the site address is inactive.
<input checked="" type="checkbox"/>	AGRE2	Duplicate Agreement Product	Hold is triggered when an agreement product is entered on the order more than once.
<input checked="" type="checkbox"/>	AGREE	AgreementProductValidation	Hold is triggered when the agreement product fails validation based on the agreement template.
<input checked="" type="checkbox"/>	ANON	Anonymous Customer Hold	Hold is triggered if the customer specified is setup as an anonymous Business Object. Use this hold when the fulfillment system does not support anonymous Customers.
<input checked="" type="checkbox"/>	CFGPRD	Order contains a configured product.	Hold triggered when the order contains at least one configured product
<input checked="" type="checkbox"/>	CONFIG	Configuration Hold	Hold is triggered if a line has a configured product and it is not configured when capture is submitted.
<input checked="" type="checkbox"/>	CORPCR	Exceed Corporate Credit Limit	Hold is triggered if the customer has exceeded the credit limit range as specified on the Customer & BU.
<input checked="" type="checkbox"/>	CRCD	Credit Card Hold	Hold is triggered if the customer is paying by credit card, and the authorization fails.

Type Definition - Hold Processing page (1 of 4)

<input checked="" type="checkbox"/>	CSTCAT	Product not found in customer's catalog	Hold is triggered if the product is found in the partner's catalog but not in the sold to customer's catalog.
<input checked="" type="checkbox"/>	CURC	Currency Conversion Not Possible	Hold is triggered if there is no currency conversion available for the pricing engine.
<input checked="" type="checkbox"/>	DATECK	Invalid Start / End Dates	Hold is triggered when the start date or end date is missing or invalid for service products.
<input type="checkbox"/>	DISC	Discount percent over limit.	Hold is triggered if the total discount on a product is more than what the customer can apply. This is exclusive of any discounts applied by price rules.
<input checked="" type="checkbox"/>	DISCNT	Discount percent over limit.	Hold is triggered if the total discount on a product is more than what the customer can apply.
<input checked="" type="checkbox"/>	DUEDAT	Fulfill By date is before Earliest Fulfill By date	Hold triggered when the Fulfill By date requested by the user is before the calculated Earliest Fulfill By date. The order will be late.
<input type="checkbox"/>	DUPLN	Duplicate Order Line Number	Hold is triggered when order has duplicate line numbers.
<input checked="" type="checkbox"/>	FREIGT	Freight Calculation Hold	Hold is triggered when the third party freight calculation fails.
<input checked="" type="checkbox"/>	MAXQTY	Exceeds Maximum Order Qty	Hold is triggered if the quantity on the line exceeds the maximum order quantity.
<input checked="" type="checkbox"/>	MINMGN	Minimum margin reached	Hold is triggered when the margin for a product is less the the minimum margin allowed.
<input checked="" type="checkbox"/>	MINQTY	Under Minimum Quantity	Hold is triggered if the quantity on the line falls below the minimum order quantity.
<input checked="" type="checkbox"/>	MINSPL	Below Minimum Selling Price	Hold is triggered if the quantity on the line falls below the minimum selling price.
<input checked="" type="checkbox"/>	NOBILC	No Bill To Contact	Hold is triggered if the bill to contact is missing.
<input checked="" type="checkbox"/>	NOBILL	No Bill To Customer	Hold is triggered if the bill to customer is missing.
<input checked="" type="checkbox"/>	NOCC	Credit Card Required Hold	Hold is triggered if Payment Method is Credit Card on File but no credit card is selected.

Type Definition - Hold Processing page (2 of 4)

<input checked="" type="checkbox"/>	NOCOMP	No Product Package Components	Hold is triggered if the line has a product that is a package, and no package components have been chosen.
<input checked="" type="checkbox"/>	NOFDO	Future Dated Orders not enabled	Hold is triggered if a Fulfill By date is set and Future Dated Orders are not enabled on the Business Unit.
<input checked="" type="checkbox"/>	NOLN	No Capture Lines	Validates that the capture has lines.
<input checked="" type="checkbox"/>	NOSHIP	No Ship To Customer	Hold is triggered if the ship to customer is missing.
<input checked="" type="checkbox"/>	NOSHPC	No Ship To Contact	Hold is triggered if the ship to contact is missing.
<input checked="" type="checkbox"/>	NOSITC	No Site Contact Specified	Hold is triggered if the site contact is missing.
<input type="checkbox"/>	NOSITE	No Site Specified	Hold is triggered if the site is missing.
<input checked="" type="checkbox"/>	NOSLDC	No Sold To Contact	Hold is triggered if the sold to contact is missing.
<input checked="" type="checkbox"/>	NOSOLD	No Sold To Customer	Hold is triggered if the sold to customer is missing.
<input type="checkbox"/>	NOSVC	Service Disconnect or Suspend before queued order	Hold is triggered if the service has a queued Disconnect or Suspend order that will execute before the current order.
<input type="checkbox"/>	NRACCT	No Recipient Accounts selected for Bulk Order	Hold triggered when no Recipient Accounts selected for Bulk Order
<input checked="" type="checkbox"/>	NRECI	No recipients selected on Bulk Order	Hold triggered when no recipients selected on Bulk Order
<input type="checkbox"/>	OVRLAP	Order Execution time frames overlap	Hold triggers when the execution timeframe of a new queued order overlaps with an existing queued order.
<input checked="" type="checkbox"/>	PCATLG	Product Catalog Violation	Hold is triggered if the product on the line is not in the customer's catalog.

Type Definition - Hold Processing page (3 of 4)

<input checked="" type="checkbox"/>	PINCR	Product Increment Violation	Hold is triggered if the line quantity is not a multiple of the increment defined on the product definition.
<input checked="" type="checkbox"/>	PPRE	Product Prerequisite Violation	Hold is triggered if the product on the line has prerequisites that are not installed, or not on the current capture.
<input checked="" type="checkbox"/>	PRLS	Price List Not Found	Hold is triggered if there is no price list found by the pricing engine.
<input checked="" type="checkbox"/>	PSITC	Line Site Contact Required	Hold is triggered if a product requires a site, and a Site Contact is not one specified.
<input checked="" type="checkbox"/>	PSITE	Line Site Required	Hold is triggered if a product requires a site, and there is not one specified.
<input checked="" type="checkbox"/>	PTNCAT	Product not found in partner's catalog	Hold is triggered if the product is in the sold to customer's catalog but not in the partner's catalog.
<input checked="" type="checkbox"/>	PTNCNT	Partner contact is missing	Hold is triggered when the partner field is populated on the order but there is no partner contact specified.
<input type="checkbox"/>	QUECH	Queued orders with installed products	Hold triggered if there are existing Queued orders with the installed products that are being disconnected or suspended.
<input checked="" type="checkbox"/>	REVAL	Order Revalidation after being Queued	Hold is triggered if the product or installed product is not active for the queued order to enact on when the order is resubmitted from the queued state.
<input checked="" type="checkbox"/>	SHPDAT	Shipment Arrival Date earlier than Fulfill By date	Hold triggered when the requested shipment Arrival Date is before the Fulfill By date. The order may be fulfilled late.
<input type="checkbox"/>	SMDATE	Validate Start and End dates on Service Management.	Hold is triggered when the start date or end date is missing or invalid for Service Management requests on service products.
<input checked="" type="checkbox"/>	SRCHRG	Price Surcharge Limit Reached	Hold is triggered when the surcharge percent is more than what the user is allowed to charge.
<input checked="" type="checkbox"/>	SUBSCR	Subscription Holds	Subscription Holds ensure valid order data for a Subscription. Order Due date is set and is today or in the future, Subscription Term and Schedule are set.
<input checked="" type="checkbox"/>	TOTPRC	Total price limit reached	Hold is triggered when the total order price is higher than the limit allowed for the current user.

Type Definition - Hold Processing page (4 of 4)

After you define holds in the Setup Workbench, you must enable or disable them for every capture type. Hold conditions appear on the Holds tab of the entry form after submission.

### Enabled

Select to make the corresponding hold code active or inactive for the current capture type.

## Defining Business Process Conditions

Access the Type Definition - Business Process Conditions page.

### Business Process Conditions

#### Workbench

Save | Refresh | Clone | Search | Next | Previous | Workbench | Personalize

**Capture Type** SM **SetID** COM01  
**Description** Service Management

Insert the business project events that will fire for this capture type.

**Business Project Events** Customize | Find | 
First | 1-10 of 10 | Last

*Sequence	Enabled	Event Name	Edit	Business Process Name	Allow Multiple Instances		
10	<input checked="" type="checkbox"/>	CommResumeService	<span>Edit</span>	Resume Order BP	<input type="checkbox"/>	<span>+</span>	<span>-</span>
10	<input checked="" type="checkbox"/>	CommSuspendService	<span>Edit</span>	Suspend Order BP	<input type="checkbox"/>	<span>+</span>	<span>-</span>
10	<input checked="" type="checkbox"/>	CommChange	<span>Edit</span>	SM Change Attribute	<input type="checkbox"/>	<span>+</span>	<span>-</span>
10	<input checked="" type="checkbox"/>	CommChangeService	<span>Edit</span>	Change Service	<input type="checkbox"/>	<span>+</span>	<span>-</span>
10	<input checked="" type="checkbox"/>	CommDisconnectService	<span>Edit</span>	Disconnect Order BP	<input type="checkbox"/>	<span>+</span>	<span>-</span>
10	<input checked="" type="checkbox"/>	CoreCancelService	<span>Edit</span>	Service Mgmt Cancel Service	<input type="checkbox"/>	<span>+</span>	<span>-</span>
10	<input checked="" type="checkbox"/>	CoreRenewService	<span>Edit</span>	Service Mgmt Renew Service	<input type="checkbox"/>	<span>+</span>	<span>-</span>
10	<input checked="" type="checkbox"/>	HeaderOpenStatus	<span>Edit</span>	Service Management Order BP	<input type="checkbox"/>	<span>+</span>	<span>-</span>
20	<input type="checkbox"/>	BulkOrderSubBP	<span>Edit</span>	Submit Bulk Order Children	<input type="checkbox"/>	<span>+</span>	<span>-</span>
20	<input type="checkbox"/>	BulkOrderGenBP	<span>Edit</span>	Bulk Order Generation	<input type="checkbox"/>	<span>+</span>	<span>-</span>

Type Definition – Business Process Definition page

When you submit an order or quote, business processes fire immediately or are queued for future-dated orders and quotes. You can view the type of business process condition that is used on the Related actions tab of the order entry form.

Define business process conditions for each capture type here, and include events for order submission as well as order maintenance activity.

### Business Process Conditions

**Sequence** Enter the order in which the Order Capture business process condition fires when more than one event fires for a single capture.

**Enabled** Select to activate the corresponding event.

**Event Name** Enter the event name for the business process you select in the Business Process Name field.

The exact Event Name must be entered for the corresponding Business Process Name. If you use an unrecognized event name, the default is to run the business process associated to the event.

Valid names are: *BulkOrderGenBP*; *BulkOrderSubBP*; *CommChange*; *CommActivateService*; *CommChangeService*; *CommDisconnectService*; *CommResumeService*; *CommSuspendService*; *CoreCancelService*; *CoreMaintBP*; *CoreOrderBP*; *CoreQuoteBP*; *CoreRenewService*; *ESAOrderBP*; *HeaderOpenStatus*; *PACRequest*; *PortInRequest*; *Telco New Order BPEL*; *PortinBP*; and *CommSuspendChangeService*.

The field becomes read-only after you save the page.

**Edit**

(Optional) Click this button to launch the Build Process Conditions page, where you can override the delivered PeopleCode logic for initiating the process using the terms of the Active Analytics Framework (AAF).

For example, if the current PeopleCode condition fires the event when RO\_HEADER.STATUS\_CODE >= 2000, you can override it by defining a different condition that fires the event, for example, RO\_HEADER.STATUS\_CODE >= 1000. When an AAF condition is defined, the PeopleCode condition is ignored.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Business Process Management”.

See Appendix A, “Order Capture Delivered Business Processes and Web Services,” page 347.

**Business Process**

Select an order capture business process to be initiated when the process conditions are met.

Order Capture delivers three business processes representing the order, the quote, and order change/maintenance.

**Allow Multiple Instances**

Select to enable multiple instances of this business process to start and run against the same capture.

**See Also**

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

Chapter 6, “Working with Order Capture Business Projects,” page 89

## Defining Audit Conditions

Access the Type Definition - Audit Conditions page.

**Type Definition**  
**Audit Conditions**  
**Workbench**

Save Refresh Clone Search Next Previous Workbench Personalize

**Capture Type** SO **SetID** SHARE  
**Description** Order

Insert the data element events for this capture type. Data elements and their associated classes drive the maintenance and audit processing for this capture type.

**Audit Events** Customize Find First 1-4 of 4 Last

Audit Event Name	Edit	*Sequence	Enabled	*Audit Handler	*Message Set Number	*Message Number	*Message Text
AuditCaptureMaintained	Edit	10	✓	AuditMessage	18065	233	Explain
AuditHoldPassed	Edit	10	✓	AuditMessage	18065	232	Explain
AuditManualHold	Edit	10	✓	AuditMessage	18065	234	Explain
AuditOpenStatusSubmit	Edit	10	✓	AuditMessage	18065	231	Explain

Type Definition - Audit Conditions page

Audit events appear in Change History on the History tab of the order entry form. Audits help identify the specific events that took place relative to this specific order or quote.

---

**Note.** If audit conditions are not defined on this page, hard-coded conditions are used.

---

## Audit Events

<b>Audit Event Name</b>	Displays a reference to the AAF term.
<b>Edit</b>	(Optional) Click this button to launch the Build Condition page, where you can create condition statements using AAF terms to determine when the audit event is fired.
<b>Sequence</b>	Enter the sequence in which the audit events fire. Events can fire simultaneously.
<b>Enabled</b>	Select to enable the corresponding audit event.
<b>Audit Handler</b>	Select the data element from the Setup Workbench extended application class that writes the audit message. A generic audit-message handler writes the message text to the Related History page when the audit event results in <i>True</i> . Create other audit handlers if you need configured logic.
<b>Message Set Number</b>	Enter the message set reference of the audit message that the event handler writes to the Related History page.
<b>Message Number</b>	Enter the message set number reference of the audit message that is to be written to the Related History page.
<b>Message Text</b>	Select whether the audit message's <i>Explain</i> text or <i>Short</i> text is written to the Related History page.

## Defining Maintenance Conditions

Access the Type Definition - Maintenance Conditions page.

**Type Definition**

**Maintenance Conditions**

**Workbench**

Save Refresh Clone Search Next Previous Workbench Personalize

**Capture Type** SO **SetID** SHARE  
**Description** Order

Insert the data element events for this capture type. Data elements and their associated classes drive the maintenance and audit processing for this capture type.

**Maintenance Events** Customize Find First 1-12 of 12 Last

Maintenance Event	Edit	*Sequence	Enabled	*Maintenance Handler	*Event Type		
CoreMaintLineCustomer	Edit	10	<input checked="" type="checkbox"/>	LineCustomer	Line	+	-
CoreMaintHdrCustomer	Edit	10	<input checked="" type="checkbox"/>	HeaderCustomer	Header	+	-
CoreMaintHdrGeneral	Edit	10	<input checked="" type="checkbox"/>	HeaderGeneral	Header	+	-
CoreMaintHdrPricing	Edit	10	<input checked="" type="checkbox"/>	HeaderPricing	Header	+	-
CoreMaintLineStatusStatus	Edit	10	<input checked="" type="checkbox"/>	LineStatusStatus	Line Stat	+	-
CoreMaintLineConfig	Edit	10	<input checked="" type="checkbox"/>	LineConfig	Line	+	-
CoreMaintLineStatus	Edit	10	<input checked="" type="checkbox"/>	LineStatus	Line	+	-
CoreMaintLineGeneral	Edit	10	<input checked="" type="checkbox"/>	LineGeneral	Line	+	-
CoreMaintLinePrice	Edit	10	<input checked="" type="checkbox"/>	LinePrice	Line	+	-
CoreMaintRequired	Edit	10	<input checked="" type="checkbox"/>	MaintenanceRequired	Enabler	+	-
CoreMaintAvailable	Edit	20	<input checked="" type="checkbox"/>	CaptureExclusive	Exclusive	+	-
CoreMaintHdrStatus	Edit	30	<input checked="" type="checkbox"/>	HeaderStatus	Exclusive	+	-

Type Definition - Maintenance Conditions page

You can enable or disable maintenance events that you created when you defined maintenance handlers in the Setup Workbench. In maintenance setup, you connect maintenance events, maintenance handlers, and event types.

**Note.** If maintenance conditions are not defined on this page, hard-coded conditions are used.

- Maintenance Events** Displays a reference to the AAF term.
- Edit** (Optional) Click this button to launch the Build Condition page, where you can create condition statements using AAF terms to determine when the maintenance event is fired.
- Sequence** Enter the order in which the audit events fire when more than one audit fires.
- Enabled** Select to enable the corresponding audit event.
- Maintenance Handler** Select the data event handler (that you created in the Setup Workbench) that handles processing when the maintenance event evaluates to *True* or *False*. Based on the result of the event, logic is fired to make data elements of the capture editable or uneditable during a maintenance request.

**Note.** Certain handlers also determine if a capture needs maintenance processing and whether it is allowed based on the evaluation of associated events.

**Event Type**

Select an event type that determines when the event is run, as well as the level of data that is passed to the maintenance handler. Enabler events are fired when a capture is first loaded. These events determine if maintenance processing is required based on the event definition. If they are required, the handler is invoked, and the system sets the capture internal logic set to *MaintenanceRequired*. Then, the system evaluates exclusive events to determine if the capture can be maintained. Whether or not the capture is maintained is determined as a consequence of the result of these events.

When you request capture maintenance by clicking the Maintain button in the Order Capture toolbar, the system evaluates remaining events by header, line, and line status, based on the defined sequence. These events determine maintenance eligibility of data. After all events are run, the system presents the capture, with the appropriate editable and maintainable data, to the CSR.

## Defining Dynamic Events

Access the Type Definition - Dynamic Events page.

**Type Definition**

**Dynamic Events**

**Workbench**

Save | Refresh | Clone | Search | Next | Previous | Workbench | Personalize

**Capture Type** SO **SetID** SHARE

**Description** Order

Insert the dynamic events for this capture type. Dynamic events allow for dynamic pluggable processing for this capture type, using the dynamic event classes.

**Dynamic Events** Customize | Find | First 1-3 of 3 Last

*Sequence	Enabled	Dynamic Class		
10	<input checked="" type="checkbox"/>	Order Handler	+	-
10	<input checked="" type="checkbox"/>	SFA Update	+	-
10	<input checked="" type="checkbox"/>	Business Projects	+	-

Type Definition - Dynamic Events page

**Sequence**

Enter the sequence in which the dynamic events fire. Events can fire simultaneously.

**Enabled**

Clear this check box to disable loading for this application class.

**Dynamic Class**

Displays a reference class, which you create in the Setup Workbench. These classes dynamically fire during capture processing.

---

**Note.** PeopleSoft CRM delivers events for component defaulting and component saving.

---

## Defining MCF Types

Access the Type Definition - MCF Types page.

The screenshot shows the 'Type Definition - MCF Types' page. At the top, there is a 'Type Definition' header and a 'MCF Types' section. Below this is a 'Workbench' area with a toolbar containing buttons for Save, Refresh, Clone, Search, Next, Previous, Workbench, and Personalize. The main content area displays the 'Capture Type' as 'SO' and the 'Description' as 'Order'. Below this, there is a 'SetID' field with the value 'SHARE'. The page instructs the user to 'Insert the MCF Types that will be used by this capture type.' A table titled 'MCF Types' is shown with the following data:

Enabled	MCF Type	Package ID		
<input checked="" type="checkbox"/>	Confirmation Agreement	Order Confirmation Agreen	+	-
<input checked="" type="checkbox"/>	Confirmation Single Shipment	Order Confirmation	+	-
<input checked="" type="checkbox"/>	Confirmation Multiple Shipments	Order Confirmation	+	-
<input checked="" type="checkbox"/>	Maintenance	Order Maintenance	+	-

Type Definition - MCF Types page

To define new correspondences, connect the MCF type and package ID. Once you complete this setup step, you can generate correspondence for Order Capture.

- Enabled** Select to enable the MCF type for the corresponding package ID.
- MCF Type** Displays the event that you defined as an MCF type in the Setup Workbench.
- Package ID** Select a package ID for Order Capture. Order Capture uses predefined templates that facilitate the creation of standardized communication between the user and the CSR. You make templates available to end users by grouping them in *template packages*. These packages can contain one or more *templates definitions*, which in turn reference *template files*. They also have package IDs, which are available for selection here.

---

**Note.** This field contains a list of package IDs that are defined in the correspondence package definition with a usage of *Order Capture* and a language of *English*.

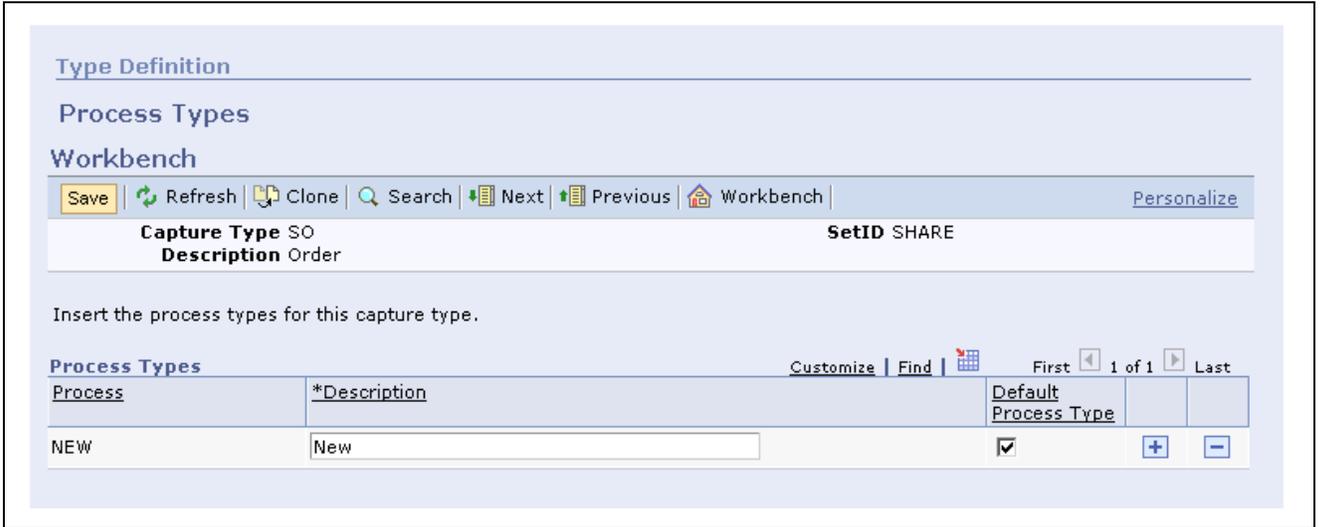
---

### See Also

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

## Defining Process Types

Access the Type Definition - Process Types page.



Type Definition - Process Types page

**Note.** The PeopleSoft system does not use this capture type definition. However, certain industry-specific applications may create process types here.

## Defining Integrations and Mappings

This section discusses how to:

- Define integrations.
- Define header status mappings.
- Define line status mappings.
- Define source mappings.

To define integrations, use the Integration Definitions (RO\_DEFN\_INTEGRATE\_GBL) component.

## Pages Used to Define Integrations and Mappings

Page Name	Object Name	Navigation	Usage
Integration Definitions - Workbench	RO_DEFN_INTEGRT	Set Up CRM, Product Related, Order Capture, Integration Workbench, Integration Definitions	Define integrations (such as mapping to fulfillment systems).
Integration Definitions - Header Status Mappings	RO_DEFN_HDSTMAP	Click the Map Header Status link on the Integration Definitions - Workbench page.	Define status mappings at the header level to (and from) external systems.
Integration Definitions - Line Status Mappings	RO_DEFN_LNSTMAP	Click the Line Status Mappings link on the Integration Definitions - Workbench page.	Define status mappings at the line level to (and from) external systems.
Integration Definitions - Source Mappings	RO_DEFN_INTSRC	Click the Source Mappings link on the Integration Definitions - Workbench page.	Define source mappings to message nodes.

## Defining Integrations

Access the Integration Definitions - Workbench page.

### Integration Definitions

#### Workbench

Save | Refresh | Clone | Search | Next | Previous | Workbench | Personalize

**Description** SHARE Integration values **SetID** SHARE

This workbench allows users to view a summary of all the integration tables required for the Order Capture application. Click the details link to add or update specific setup data.

#### Workbench Details

**\*Description**

**\*Status Refresh Interval**       **\*Fulfillment Node**  🔍

#### Workbench Steps

Details	Progress
1: Integration Definitions	4 of 4 required fields completed.
2: <a href="#">Header Status Mappings</a>	5 Header Status Mappings
3: <a href="#">Line Status Mappings</a>	14 Line Status Mappings
4: <a href="#">Source Mappings</a>	1 Source Mappings

**Modified**    03/22/2004 12:53PM PST    jruggier

Integration Definitions - Workbench page

## Workbench Details

- Description** Displays the description of the integration definition.
- Status Refresh Interval** Enter the number of seconds that must elapse before the system carries out an additional status call. For example, if the interval is set to 60 (seconds), then the system makes only one status call per minute, regardless of how many times the user clicks the Refresh toolbar button.
- Fulfillment Node** Enter the Integration Broker node name that the system uses to perform order fulfillment for this setID. Each of the defined header, line, and source mappings refer to this fulfillment node.

## Workbench Steps

- Header Status Mappings** Click to access the Header Status Mappings page and define mappings between external-system statuses and internal PeopleSoft CRM statuses at the header level.
- Line Status Mappings** Click to access the Line Status Mappings page and define mappings between external-system statuses and internal PeopleSoft CRM statuses at the line level.
- Source Mappings** Click to access the Line Status Mappings page and define mappings between a message node and the corresponding source in PeopleSoft CRM.

## Defining Header Status Mappings

Access the Integration Definitions - Header Status Mappings page.

**Integration Definitions**

**Header Status Mappings**

**Workbench**

Save | Refresh | Clone | Search | Next | Previous | Workbench | Personalize

**Description** SHARE Integration values **SetID** SHARE

<b>Header Status Mappings</b>							Customize	Find	First	1-5 of 5	Last
Node Name	External Status	*CRM Status	Description	*Partial Status	Description						
1 PSFT_EP	C	6000	Complete	6000	Complete						+ -
2 PSFT_EP	H	3500	Fulfillment Hold	3500	Fulfillment Hold						+ -
3 PSFT_EP	O	2000	In Fulfillment	2000	In Fulfillment						+ -
4 PSFT_EP	P	500	New	500	New						+ -
5 PSFT_EP	X	1	Canceled	1	Canceled						+ -

Integration Definitions - Header Status Mappings page

For integrations, map PeopleSoft CRM header statuses and partial header statuses to their counterparts in the external fulfillment system.

- Node Name** Displays the message node that points to an external fulfillment system, which uses the statuses that appear in the External Status column.
- External Status** Displays the equivalent of the PeopleSoft CRM status for an external system. (Typically, external systems use status values that are different from the status values that PeopleSoft CRM uses.) For example, a PeopleSoft CRM status of 6000 (complete) maps to a status of C in PeopleSoft Order Management.
- CRM Status** Enter the Order Capture status.
- Description** Displays the text equivalent value of the numeric status value that you enter. Define the description text for partial statuses in the Setup Workbench Header Statuses step.
- Partial Status** Enter a partial status code for the header status mapping. Partial status codes are identified in the status header for an order that has order lines in different stages of the fulfillment cycle.

## Defining Line Status Mappings

Access the Integration Definitions - Line Status Mappings page.

Line Status Mappings							
Workbench							
Save		Refresh		Clone		Search	
Next		Previous		Workbench		Personalize	
Description				SetID			
SHARE Integration values				SHARE			
Line Status Mappings							
Customize   Find   First 1-20 of 20 Last							
	Node Name	External Status	*CRM Status	Description	*Partial Status	Description	
1	PSFT_EP	B	2000	Backordered	2100	Partially Backordered	+ -
2	PSFT_EP	C	6000	Shipped	6100	Partially Shipped	+ -
3	PSFT_EP	CMTD	1050	Sold	1050	Sold	+ -
4	PSFT_EP	DENY	1060	Lost	1060	Lost	+ -
5	PSFT_EP	DRAF	1010	Draft	1010	Draft	+ -
6	PSFT_EP	H	3500	Fulfillment Hold	3500	Fulfillment Hold	+ -
7	PSFT_EP	I	5700	Billed	5750	Partially Billed	+ -
8	PSFT_EP	J	5750	Partially Billed	5750	Partially Billed	+ -
9	PSFT_EP	K	5000	Picked	5100	Partially Picked	+ -
10	PSFT_EP	L	5100	Partially Picked	5100	Partially Picked	+ -

Integration Definitions - Line Status Mappings page (1 of 2)

11	PSFT_EP	O	<input type="text" value="4000"/>	In Fulfillment	<input type="text" value="4100"/>	Partially In Fulfillment	<input type="button" value="+"/>	<input type="button" value="-"/>
12	PSFT_EP	P	<input type="text" value="3000"/>	Pending	<input type="text" value="3100"/>	Partially Pending	<input type="button" value="+"/>	<input type="button" value="-"/>
13	PSFT_EP	Q	<input type="text" value="4500"/>	Requisitioned	<input type="text" value="4600"/>	Partially Requisitioned	<input type="button" value="+"/>	<input type="button" value="-"/>
14	PSFT_EP	RDY	<input type="text" value="1030"/>	Priced	<input type="text" value="1030"/>	Priced	<input type="button" value="+"/>	<input type="button" value="-"/>
15	PSFT_EP	S	<input type="text" value="6000"/>	Shipped	<input type="text" value="6100"/>	Partially Shipped	<input type="button" value="+"/>	<input type="button" value="-"/>
16	PSFT_EP	T	<input type="text" value="6100"/>	Partially Shipped	<input type="text" value="6100"/>	Partially Shipped	<input type="button" value="+"/>	<input type="button" value="-"/>
17	PSFT_EP	U	<input type="text" value="5500"/>	Purchased	<input type="text" value="5600"/>	Partially Purchased	<input type="button" value="+"/>	<input type="button" value="-"/>
18	PSFT_EP	V	<input type="text" value="3700"/>	Reserved	<input type="text" value="3750"/>	Partially Reserved	<input type="button" value="+"/>	<input type="button" value="-"/>
19	PSFT_EP	W	<input type="text" value="3750"/>	Partially Reserved	<input type="text" value="3750"/>	Partially Reserved	<input type="button" value="+"/>	<input type="button" value="-"/>
20	PSFT_EP	X	<input type="text" value="1"/>	Canceled	<input type="text" value="1"/>	Canceled	<input type="button" value="+"/>	<input type="button" value="-"/>

Integration Definitions - Line Status Mappings page (2 of 2)

For integrations, map PeopleSoft CRM line statuses and partial line statuses to their counterparts in the external fulfillment system.

- Node Name** Displays the message node that is associated with the data.
- External Status** Displays the equivalent of the Order Capture order line status for the external system. (Typically, external systems use status values that are different from the status values that PeopleSoft CRM uses.) For example, a PeopleSoft CRM status of *4000* (in fulfillment) maps to a status of *O* (open) in PeopleSoft Order Management.
- CRM Status** Enter the Order Capture line status code.
- Description** Displays the text equivalent value of the numeric status value that you enter. The description of the partial status is visible to the CSR.
- Partial Status** Enter a partial status code for the line status mapping. Partial status codes identify the status of an order that has order lines in different stages of the fulfillment cycle.  
  
Example: If one schedule on the line is back-ordered (2000) and another schedule is shipped (6000), then the partial status is the partial version of the bigger number—in this case, 6000.

## Defining Source Mappings

Access the Integration Definitions - Source Mappings page.



Integration Definitions - Source Mappings page

**Publishing Node**

Displays the message node to which Order Capture sends data. The publishing node provides a mapping between the external node and the source code, which you define on the Source Codes page in the Setup Workbench.

When you are using an external system to display an order, this mapping tells the system to which node to transfer the user and to display the order.

**Source Code**

Select the source code to which this data should map in Order Capture.

---

## Setting Up Credit Card Integration

This section provides an overview of credit card integration and discusses how to set up credit card processing.

### Understanding Credit Card Integration

Order Capture uses a third-party payment service for acceptance of credit cards as a payment type. Order Capture retrieves credit card information from either the customer profile or when the CSR (or user) enters it during the order submission and checkout process. During this process, the user can save credit card information so that the next time this user signs in, credit card information appears in the appropriate order entry form.

### Setting Up Credit Card Processing

To set up credit card processing for Order Capture and Order Capture Self Service:

- Define the types of credit cards that you accept.
- Establish your merchant account with a third-party credit card provider, such as CyberSource.
- Set up the connection parameters for credit card processing calls.

See *PeopleSoft Enterprise Components for CRM 9 PeopleBook*

---

## Setting Up Freight Integration

This section provides an overview of freight integration setup and discusses how to:

- Set up the freight calculation integration.
- Test the freight calculation integration.
- Define carriers.
- Construct tracking numbers.

### Understanding Freight Integration Setup

After you correctly install your third-party freight (carrier) application, perform these steps from within the PeopleSoft CRM application to set up freight integration:

1. Follow the instructions that are provided in the PeopleSoft CRM Installation Guide to properly configure your system.
2. Set up the freight calculation integration.
3. Add a freight calculation *vendor* to the business unit definition.
4. Test the freight calculation integration.
5. Define your carriers.
6. (optional) Construct tracking numbers.

### Setting Up the Freight Calculation Integration

PeopleSoft CRM integrates with ConnectShip to calculate freight charges. The freight calculation integration transfers the to address, carrier, and combined product weights data to ConnectShip.

To set up the freight calculation integration:

1. Activate the following application messages: *RATE\_REQUEST*, *RATE\_REQUEST\_XFRM*, and *RATE\_RESPONSE*.
2. Confirm that the *ALLPAGES* permission list has full permission to the *FREIGHT* channel.  
Select PeopleTools, Security, Permissions & Roles, Permission Lists, and open the *ALLPAGES* permission list. Select the Message Monitor tab and look for an entry for *FREIGHT*. If not found, add a new entry for the *FREIGHT* channel, and grant it full access.
3. Activate the *FREIGHT* channel through the Message Monitor, on the Channels tab.
4. Activate the *OutSync* node transaction on the node, *PSFT\_XOUTBND*, for the *RATE\_REQUEST* transaction.  
Select PeopleTools, Integration Broker, Node Definitions.
5. Activate the *OutSync* node transaction on the node, *PSFT\_XOUTBND*, for the *RATE\_REQUEST\_XFRM* transaction.

---

**Note.** This transaction uses an *HTTPTARGET* override connector and allows you to specify the URL to connect to Prologistics.

---

Replace the URL on the *RATE\_REQUEST\_XFRM* node transaction with your ConnectShip Prologistics server URL, which uses the following format: *http://<machine>/Prologistics/XML\_Processor/Server/XMLProcDLL.asp*.

If you are not using port 80 on the ConnectShip Prologistics server, indicate the port in this URL:  
*<machine>:8080*

6. Select PeopleTools, Integration Broker, Relationships, and activate the *RATE\_REQUEST* relationship. On the Trans Modifier tab, select *Edit* and activate the *RATE\_REQUEST* modifier.

## Testing the Freight Calculation Integration

When you test the integration, use UPS Ground as the carrier.

---

**Note.** To carry out the freight calculation test, you must have configured UPS Ground for your business unit on your ConnectShip Prologistics server.

---

To test the freight calculation integration:

1. Open the Order Capture Business Unit definition in PeopleSoft CRM for the business unit that you set up.

Select Set Up CRM, Business Unit Related, Order Capture Definition.

2. Click the Test Freight Calculation button.

If an amount other than zero appears, you are set up correctly. If zero appears, check the display message to determine what is not correctly set up.

See [Chapter 3, “Defining Order Capture Business Units,” Creating Order Capture Business Units, page 16](#).

## Page Used to Define Carriers

Page Name	Object Name	Navigation	Usage
Carriers	CARRIER	Set Up CRM, Product Related, Order Capture, Carrier Definition, Carriers	Define carriers for integration with Order Capture.

## Defining Carriers

Access the Carriers page.

Carriers page

To define carriers, use the Carriers (CARRIER) component.

<b>Active</b>	Select <i>Active</i> or <i>Inactive</i> . If you select <i>Inactive</i> , the carrier does not appear: <ul style="list-style-type: none"> <li>• As a valid carrier in the order capture business unit definition for PeopleSoft CRM Order Capture Self Service.</li> <li>• On the order entry form for PeopleSoft CRM Order Capture.</li> </ul>
<b>Description</b>	Enter a description that appears in several order capture locations where shipping information is defined.
<b>Third Party Freight Calc. Key</b> (third-party freight calculation key)	Enter the key that the third-party freight calculation system (for example, the ConnectShip Symbol) uses to identify this carrier.
<b>Fulfillment Carrier Key1 and Fulfillment Carrier Key2</b>	Enter keys that map the PeopleSoft CRM carriers to the equivalent carriers in the fulfillment system. For example, if you use PeopleSoft Order Management as your fulfillment system, key 1 would map to Carrier ID, while key 2 would map to Ship Via Method.
<b>URL Identifier</b>	Use this URL to construct a link to the carrier's shipment tracking page.
<b>Message Set Number</b>	Displays two message numbers.
<b>Message Number</b>	Enter the message numbers that the system uses to construct the package tracking link.

## Constructing Tracking Numbers

An order may consist of multiple shipments and, consequently, of multiple tracking numbers. Order Capture and Order Capture Self Service support the construction of a single tracking link, which displays all shipments at once.

To construct a tracking link:

1. Point the URL identifier to a URL definition.  
This is the static (unchanging) portion of the carrier's tracking URL.
2. If there is more than one shipment to track, ensure that the first message catalog entry message number is appended to the URL.  
Parameter %1 within the message is replaced by the package number (for example, 1 for the first package, 2 for the second package). The shipment's tracking number replaces Parameter %2. If only one shipment is being tracked, this message is not used in constructing the URL.
3. For the last package, append the second message catalog entry to the URL using the same parameter replacement rules as the first message number.

---

**Note.** You use the second message catalog entry only if a tracking link is constructed for one package. If the second message catalog entry is not present, then you use the first message catalog entry.

---

### UPS Example

If two United Parcel Service (UPS) packages are tracked at once, this link would work:

```
http://wwwapps.ups.com/etracking/tracking.cgi?sort_by=status&track=Track&TypeOfInquiryNumber=T&InquiryNumber1=444&InquiryNumber2=555
```

---

**Note.** PeopleSoft CRM ships with the URL definition UPS\_TRACK, which is defined as `http://wwwapps.ups.com/etracking/tracking.cgi?sort_by=status&track=Track&TypeOfInquiryNumber=T`. PeopleSoft CRM also ships with a single message catalog entry: 18065, 80. This contains `&InquiryNumber%1=%2`.

---

When you construct this link, the URL definition is initially appended with this message catalog entry. Replace %1 with the first shipment number (1) and %2 with the tracking number for the first shipment (444), which yields this string: `http://wwwapps.ups.com/etracking/tracking.cgi?sort_by=status&track=Track&TypeOfInquiryNumber=T&InquiryNumber1=444`. The next shipment is the final shipment, but because there is no defined second message catalog entry, the first entry is appended once more. This becomes the final link: `http://wwwapps.ups.com/etracking/tracking.cgi?sort_by=status&track=Track&TypeOfInquiryNumber=T&InquiryNumber1=444&InquiryNumber2=555`.

### FedEx Example

This link tracks two Federal Express (FedEx) shipments (tracking numbers 444 and 555):

```
http://www.fedex.com/cgi-bin/tracking?action=track&tracknumbers=444,555.
```

The URL definition, FEDEX\_TRACK, contains `http://www.fedex.com/cgi-bin/tracking?action=track&tracknumbers=`. The message catalog entry 18065, 81 is %2, (note the comma). The message catalog entry 18065,82 is simply %2.

---

**Note.** FedEx does not use the %1 parameter (which is the shipment number).

---

For these two packages, the URL definition is initially appended with the first message catalog entry and becomes `http://www.fedex.com/cgi-bin/tracking?action=track&tracknumbers=444`.

For the final package, the second message catalog entry is used and appended to the above string, resulting in `http://www.fedex.com/cgi-bin/tracking?action=track&tracknumbers=444,555`.

If only one package is tracked, the second message catalog entry is appended to the URL definition, yielding `http://www.fedex.com/cgi-bin/tracking?action=track&tracknumbers=555`.

---

**Note.** In the last example, the first message catalog entry was not used.

---

## Defining Tax Installation Options

This section provides an overview of tax installation options setup and discusses how to define tax provider options.

### Understanding Tax Installation Options Setup

Order Capture works with third-party systems such as Taxware, Vertex, and WorldTax to calculate taxes on orders.

Once the preferred tax application is installed to work with PeopleSoft CRM applications, you must define tax settings for your business units and then define advanced tax installation options for either Taxware or Vertex. Taxware uses the STEP feature, while Vertex uses its Tax Decision Maker (TDM). If you use these, you must select the appropriate check boxes on the Tax Provider page.

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**Note.** You can also take advantage of product groups.

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### Tax Settings for Business Units

Business units determine tax sets, which are entered when you define your business units on the Order Capture Definition page.

See [Chapter 3, “Defining Order Capture Business Units,” Creating Order Capture Business Units, page 16](#).

### Tax Product Groups

You can set up product tax groups to take advantage of the Taxware Product Matrix or the Vertex Product Taxability files in Vertex TDM.

A *tax product group* is a product group with a product group type of Tax, which you define in PROD\_GROUP\_TBL.

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**Note.** If you organize your data wisely, using tax product groups reduces taxing errors and product maintenance time.

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Each order line has a single product ID. You can associate a tax product group with each product. Order Capture sends the product ID and the tax product group through the interface, and Taxware or Vertex determines whether the product ID or product tax group takes precedence.

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**Note.** If you use Taxware, you can simplify data entry by creating tax product groups that are equal to any of the Taxware product codes that apply to your company’s business. Create or update your product IDs with the tax groups that apply.

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

## Page Used to Define Tax Provider Options

Page Name	Object Name	Navigation	Usage
Tax Provider Options	TAX_PROV_INFO	Set Up CRM, Product Related, Order Capture, Tax Provider Options, Tax Provider Options	Define tax provider (Taxware or Vertex) options.

## Defining Tax Provider Options

To define tax provider options, use the Tax Provider Options (TAX\_PROV\_INFO) component.

Access the Tax Provider Options page.

Tax Provider Options page

### Taxware

#### Use STEP

Select, if you are using the Taxware STEP module, to indicate that additional fields must be sent through the interface.

#### Reason Code Matching

Select how you want to handle tax certificate entry reason lookup in STEP. Select *Exact Reason Code Match*, the more restrictive of the two options, to have Taxware find only tax certificates that were entered with the exact reason code that you set up on the order line. If you select *Use Default Record*, Taxware looks for an exact match. If it does not find one, it uses a default tax certificate for exemption.

#### Certificate Level

Select which taxing jurisdiction level tax certificates apply. If you select *Individual Certificate Levels*, STEP looks for certificates at all individual levels and exempts tax only for the levels at which a certificate is found. *State Level Only* prompts STEP to look for a certificate only at the state level.

### Vertex

#### Use TDM

Select to use the Vertex TDM application to set up exceptions to taxability rules in the states where they apply. In TDM, you can set up product classes,

which are equivalent to tax product groups and product IDs. You can decide whether to use product IDs or product classes.



## CHAPTER 5

# Understanding Product, Pricing, Proration, and Catalogs

This chapter discusses:

- Products, PeopleSoft Enterprise Pricer, and catalogs.
- Product setup.
- Pricing setup.
- Proration of price adjustments.
- Catalog setup.

### See Also

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

*PeopleSoft Enterprise CRM Enterprise Pricer 9 PeopleBook*

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, “Creating Catalogs”

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## Products, PeopleSoft Enterprise Pricer, and Catalogs

This section discusses the integration of products, pricing, and catalogs with Order Capture.

### Products

Product definitions provide the foundation for many features of PeopleSoft Customer Relationship Management (PeopleSoft CRM), including product ordering, catalogs, and catalog searches. Product records are also used by PeopleSoft Advisor to create the Advisor dialogs that are accessed from within Order Capture and Order Capture Self Service.

You can use many of the elements used to define products—such as product brand, product category, product group, and product attributes—to dynamically generate catalogs based on criteria that you specify. For example, you can create rules that select only certain brands for inclusion in a catalog or that include products based on their attributes.

## Pricing

PeopleSoft Enterprise Pricer enables real-time, dynamic pricing on quotes and orders based on company pricing policies. Order Capture users define rules that determine which discounts, surcharges, giveaways, and conditions apply. As products are added to a quote or an order, PeopleSoft Enterprise Pricer applies all of the pricing rules that match the defined conditions to determine a final price. Conditions might include number of products ordered, type of customer, or customer region. The same pricing engine also allows customer service representatives (CSRs) to manually adjust prices and view all price adjustments related to an order or a quote.

## Catalogs

The PeopleSoft CRM Catalog contains a hierarchy of products that Order Capture and Order Capture Self Service can access. You can access catalogs from different locations within the collaborative selling suite of applications. Users can navigate directly to Catalog Search and enter search criteria in the search dialog box, or configure the PeopleSoft CRM portal homepage to display a catalog search pagelet. You can also navigate to the catalog by using the order form.

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**Note.** To navigate to the catalog by using the order form, you must have the PeopleSoft CRM Portal Pack installed.

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Using the order form, CSRs can search catalogs for product information. Order Capture Self Service customers can also view catalog information.

In addition, you can restrict user access to a product by validating it against a catalog when the product is added to an order.

CSRs and customers can also access the product catalog by way of PeopleSoft Advisor dialogs, and CSRs and customers can launch PeopleSoft Advisor from the catalog to retrieve product recommendations based on dialog interactions.

If you try to submit a product without linking it to a catalog, the order is held with the message *Product (number), (Name) on Line 1 is not in the Customer's Product Catalog*. You have two choices:

- You can override the hold by changing the hold status.
- You can turn off this hold.

If you turn the hold off, it will never fire for any CSRs. If you do not want to use catalogs at all in the system, or you do not care if customers order products not in their catalog, then you can simply turn the hold off via the Order Capture Workbench.

To turn off this hold, navigate to Set Up CRM, Product Related, Order Capture, Capture Type Workbench. Choose the SetID you are working with. Change the Capture Type codes for each scenario. Start with Quote or Order. Chose Hold Processing. Clear *Product Catalog Violation* and save.

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**Note.** The default catalog in Find Products in the left navigation changes after selecting a different business unit in the Add Order page. This ensures that the CSR will see consistent catalogs while being in Add Order or in Find Product.

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## Product Setup

To define products and packages in PeopleSoft CRM, you:

1. Create definitional elements to associate with product elements such as product brand, product category, and competency codes.

These are reusable attributes that you associate with product IDs in step 2 to create unique product and package definitions.

2. Create the product and associate definitional elements (as well as other product attributes and parameters) with the product IDs.
3. Assign product units of measure on the Product Attributes by UOM page.
4. Define package components on the Package Components page (for products defined as packages).
5. Establish product prices using the Product Price page (for individual products and packages with top-level pricing) or the Product Component Pricing page (for packages using component-level pricing).
6. Define product relationships on the Product Relationships page.
7. Associate standard or custom notes with products on the Notes page.

### See Also

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

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## Pricing Setup

Documentation on how to set up and use PeopleSoft Enterprise Pricer appears in the *PeopleSoft Enterprise Pricer 9 PeopleBook*.

See *PeopleSoft Enterprise CRM Enterprise Pricer 9 PeopleBook*.

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## Proration of Price Adjustments

This section provides an overview of adjustment price proration and discusses:

- Order level adjustments.
- Price adjustment history.
- Proration of adjustments per line.
- Customer billing integrations.

### Order Level Adjustments

Order Capture enables you to prorate order level adjustments when creating and maintaining orders and quotes. To use this functionality, you must create a Total Order Discount/Surcharge price rule in Enterprise Pricer.

Proration of order level adjustments consists of three major components:

- Configuring the application to use proration.
  - A new dropdown on the business unit determines if the order level adjustments are prorated or not.
- Dividing adjustments over the order lines.

The ratio for the prorated adjustment considers the net price of each line with the quantity ordered in order to prorate the order level adjustment appropriately.

- Displaying adjustment history.

The history table keeps track of the adjustments that are applied to each line. Any adjustment that affects the net unit price is reflected in the history table.

These guidelines apply to creating orders with an order level adjustment:

Guideline	Description
Different adjustment types	More than one order level adjustment can be applied to the order at the same time. These adjustments can be either a fixed amount or a percentage.
Manual order level adjustments	You can add a manual adjustment that will apply to the entire order. The manual order level adjustments are grouped with the order level adjustments that were applied by the Enterprise Pricer. The sum of both the manual and system adjustments gives the total order amount that will be prorated
Order level discount across order lines	The ratio for the prorated adjustment considers the net price of each line with the quantity ordered in order to prorate the order level adjustment appropriately.
Price adjustment history	The history table keeps track of the adjustments that are applied to each line. Any adjustment that affects the net unit price is reflected in the history table.
Repricing an order	When proration is turned on, it is performed every time the order is repriced.
Order of adjustments	The adjustments from price rules defined to be applied at the line level are always applied first. The manual adjustments are applied second and price protect the line. The prorated order level adjustments are applied last
Discount/Surcharge in the total section	When the order level adjustments are prorated, the fields use to store the order level adjustment on the order are set to 0. The Discount/Surcharge rows in the total grid are hidden.
Holds	By adjusting the price on a line with a prorated adjustment, it is possible that the order will go on hold if the price goes under the minimum selling price. The existing holds are applied.
Package Products	Package products are prorated just like other products on the order. Pricing for these can be at the component level, or at the product header level.

The following guidelines apply to maintaining orders with an order level adjustment:

Guideline	Description
Protected prorated adjustments	<p>Order lines with these statuses protect the prorated amount for that line:</p> <ul style="list-style-type: none"> <li>• 5000 – <i>Picked</i></li> <li>• 5100 – <i>Partially Picked</i></li> <li>• 5500 – <i>Purchased</i></li> <li>• 5600 – <i>Partially Purchased</i></li> <li>• 5700 – <i>Billed</i></li> <li>• 5750 – <i>Partially Billed</i></li> <li>• 6000 – <i>Shipped</i></li> <li>• 6010 – <i>Complete</i></li> <li>• 6100 – <i>Partially Shipped</i></li> </ul> <p><b>Note.</b> When the prorated amount is protected, it is not recalculated every time the proration calculation is done.</p>
Cancelled order lines	When prorating the order level adjustments, the lines that are cancelled are excluded from the proration, as well as Engagement Service products.
Adding product to order	Adding a product to the order forces the proration to be done again.
Changing existing order line	Change to an existing order lines forces the proration to be done again.
Deleting order line	Deleting an order line forces the proration to be done again.
Minimum order level adjustment	If an order is being maintained, it is possible that the prorated adjustments that are protected based on the line status will be higher than the new order level adjustment that will be calculated after the order is changed. In this case, the amounts that are protected will remain the same and won't be decreased to match the new order level adjustment.

The following guidelines apply to converting a quote with an order level adjustment to an order:

Guideline	Description
Calculation of order level adjustments for orders that come from a quote.	<p>There is no flag on the order that can be use to indicate that the order level adjustments are price protected. This flag exist only for the line prices.</p> <p>When an order is created from a quote, the Related Actions tab on the order contains a reference to the originating quote. This reference is used to determine if the order level adjustment should be recalculated, or if the one calculated on the quote should remain.</p>
Proration of order level adjustments for orders that come from a quote.	When an order is created from a quote, there is no proration of order level adjustments done on the order. The proration is done only on the quote. If the business unit is set up to allow for editing the order following conversion from a quote, then any changes made to the order results in recalculating the prorated adjustments.

## Proration of Adjustments Per Line

The following guidelines apply to prorating the order level adjustment per line:

Guideline	Description
Order lines included in the proration	Order lines that are cancelled or that already have a prorated adjustment that is protected are not included in the proration. Neither are Engagement Service products.
Order lines excluded in the proration	<p>Order level adjustments that have already been billed should remain the same and should not be reapplied.</p> <p>For example: an order was created with 4 order lines and a prorated order level discount of 20\$ had been prorated evenly across these lines (each line receiving 5\$ discount). Line 1 has been billed and the other lines have not. If you maintain the order and add a fifth line, the 20\$ order level discount still applies. When the proration is done again, instead of giving 4\$ per line, the line that was billed will keep 5\$ of the 20\$ and the other 15\$ will be divided across the 4 other lines.</p>
Displaying order level adjustments as an amount	Order level adjustments can be both a percent and an amount. The total adjustment is calculated as an amount so that the amount can be divided across the lines.
Net unit price adjustment	The net unit price on the line is the price that gets updated. Order Capture does not store the extended price for a line. The net unit price multiplied by the quantity gives the extended price. The order quantity is included when calculated with the adjustment ratio applied.

Guideline	Description
Adjustment ratio calculation	The following formula is used to find the adjustment to apply to the net price on the line:  $\frac{((\text{Order Level Adjustment} - \text{Protected Amount}) * (\text{Net Price}))}{(\text{Order Sub Total} - \text{Extended Line Price of Protected Lines})}$
Recurring charges	Only nonrecurring charges are affected by the proration.
Price protected lines	The prorated adjustment amount can be applied to a line, even if that line is protected.
Giveaway products	Giveaways lines are excluded from the proration
Free periods products	Free Periods lines are excluded from the proration

### Calculation Example

If an order has these two lines:

Product	Quantity	List Price	Extended Price
1000	3	20.00	60.00
1001	7	15.00	105.00
Total order price			165.00

To prorate an order level discount of \$20.00 USD, first calculate what the unit prices of each product must be to arrive at the discounted order amount:

- For product 1000, the discounted unit price is  $\$20.00 - (20.00 * 20.00 / 165.00)$ , or \$17.58 USD.  
The extended price is  $3 * 17.58$ , or \$52.74 USD.
- For product 1001, the discounted unit price is  $\$(20.00 * (20.00 * 15.00 / 165.00))$ , or 13.18 USD  
The extended price is  $7 * 13.18$ , or \$92.26 USD.

The order total is  $\$52.74 + \$92.26$ , or \$145.00 USD.

---

**Note.** When line quantities are greater than 1, the entire discount amount might not prorate evenly across the order lines. For example, using an order discount of 20.05 in the above scenario, would the result in only USD \$20.03 of the discount being applied. The remaining \$02 USD cannot be evenly spread to a unit price when the line quantities are 3 and 7, and therefore remains unapplied.

---

### Price Adjustment History

The following guidelines apply to reviewing price adjustment history:

Guideline	Description
Prorated adjustments on the price adjustment page	The price adjustment history page shows all the adjustments that are applied to the list price in order to calculate the net unit price. The prorated adjustments are displayed on this page.
Deleting history rows	The Adjustment History page allows the user to delete an adjustment that was applied manually. System adjustments and prorated adjustments cannot be removed.  To remove prorated adjustments that result from a manual order level adjustment, remove the manual order level adjustment. You cannot remove prorated adjustments that result from a price rule.
Add a Final Unit Price to the adjustments page	Final Unit Price reflects the list price with discounts subtracted, and surcharges added. This is displayed in the Unit Price field on the order line.

## Customer Billing Integrations

The current integration to Supply Chain Management (SCM) and TBP will not be affected by the changes made for prorating the order level adjustments.

The following guidelines apply to billing integrations to Supply Chain Management (SCM) and TBP:

Guideline	Description
Integration to TBP with proration turned ON	When proration has been turned ON, the order level adjustments will be prorated across the order lines and passed to the TBP as part of the line price. No adjustments are stored at the order level.
Integration to SCM and TBP with proration turned ON	When proration has been turned ON, and the order/quote contains products that are passed to TBP and other that are passed to the fulfillment system, the order level adjustments will be prorated across the order lines and passed to SCM and TBP as part of the line price.
Integration to TBP with proration turned OFF	When proration has been turned OFF, the order level adjustments will be stored at the order level but they won't be passed to TBP.
Integration to Supply Chain Management (SCM) with proration turned OFF	When proration has been turned OFF, the order level adjustments will be stored at the order level and they will be passed to SCM as an order level adjustment.
Integration to Supply Chain Management (SCM) and TBP with proration turned OFF	When proration has been turned OFF, and the order/quote contains products that are passed to TBP and other that are passed to the fulfillment system, the order level adjustments will be stored at the order level and will be passed to SCM as an order level adjustment.

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## Catalog Setup

PeopleSoft CRM enables you to define the layout and content of online product catalogs for internal and external use. You define the look and feel of catalogs by creating display templates, and then define the contents that you want to organize and present according to your template definitions. You can designate products for inclusion in a catalog either by direct association (using product IDs) or by creating business rules to dynamically build product content based on the selection criteria that you define. Similarly, you can control user access to catalogs (as well as tailor catalogs to users) by directly associating user IDs with specific catalogs or by setting up business rules to establish permissions.

### See Also

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, “Creating Catalogs”



## CHAPTER 6

# Working with Order Capture Business Projects

This chapter provides overviews of Order Capture business projects and the Order Bridge and discusses how to:

- Define Order Capture business projects.
- View Order Capture business projects.
- View the Order Bridge.

### See Also

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

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

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## Understanding Order Capture Business Projects

PeopleSoft Customer Relationship Management (PeopleSoft CRM) delivers business projects that automatically manage certain predefined application processes. Using a business project to manage these tasks simplifies the management of conditional logic that often varies based on industry- and customer-specific needs.

Order Capture delivers three prebuilt business projects, each of which is a combination of phases and tasks designed to manage the order capture business process. Order Capture business projects are advantageous because they automate the processing steps for orders and quotes. To enable the configuration of key order processing events, Order Capture uses business projects as the agent to initiate and verify those events. Specifically, they trigger and confirm the status of key events, such as email confirmation, creation of installed product records, publishing of data to a fulfillment system, and notification of shipment completion.

---

**Note.** Order Capture business projects are registered as actions related to the order and can, therefore, be found on the Related Actions page of the Order Capture component.

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This table describes the three Order Capture business projects that the PeopleSoft system delivers:

Business Project	Object Name	Event Name	Internal Description	Triggering Event
Order	CORE_ORDER_BP	CoreOrderBP	Order Capture BP	The order status changes to <i>Submitted</i> . The business project is instantiated when the STATUS_CODE field on the RO_HEADER record equals a code status of 1000.
Order Maintenance	CORE_ORD_CHG_BP	CoreMaintBP	Order Change BP	When an order is maintained and submitted, the system saves changes to the order to RO_HISTORY. When an RO_HISTORY record is created with <i>Open</i> status, the CoreMaintBP event is triggered. The business project is instantiated when the RO_HISTORY_STATUS field on the RO_HISTORY record changes to <i>Submitted</i> status.
Quote	CORE_QUOTE_BP	CoreQuoteBP	Quote BP	The quote status changes to <i>Submitted</i> . The business project is instantiated when the STATUS_CODE field on the RO_HEADER record equals a code status of at least 1000.

---

**Note.** Order Capture also supports several industry-specific business projects. Applications such as PeopleSoft Enterprise Phone Number Administration, PeopleSoft Enterprise Client Management, PeopleSoft Enterprise Policy and Claims Presentment, PeopleSoft Enterprise Banking Transactions, PeopleSoft Enterprise Bill Presentment and Account Management, and PeopleSoft CRM for High Technology include their own business projects that are tailored to the specific needs of their respective industries. Consult the documentation for those applications to better understand how their business projects work with the Order Capture framework.

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## Understanding the Order Bridge

The Order Bridge provides an alternate view of order progress than a business project. Each task in a business project might generate additional system tasks, for example, notifications, Application Engine Processes, and messages sent or received from other external PeopleSoft applications or third parties. These tasks do not appear on the Business Project page, but they do appear on the Order Bridge.

Each business project that is associated with an order appears separately. Order Bridge is accessible only from the Fulfillment tab on the Order page. Events appear in a hierarchical view with the business project at the top, followed by phases, tasks, and events that are generated by the task, including subprojects.

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## Defining Order Capture Business Projects

This section provides an overview of business project definition and discusses how to set up and view Order Capture business projects.

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**Note.** This section supplements the general PeopleSoft CRM documentation, which explains how to set up business projects for all PeopleSoft CRM applications. Because Order Capture delivers a centralized Capture Type Workbench, the method to set up business projects differs slightly from other PeopleSoft CRM applications.

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### See Also

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

## Understanding Business Project Definition

Order, quote, and maintenance business projects, like other business projects, are broken down into phases, tasks, and transition rules. *Tasks* are the basic unit of work in a business project. *Phases* represent groups of tasks. When you create phases, tasks, and transition rules, you define the central element of the business project. *Transition rules* establish the conditions by which the business project moves from one phase to the next.

### Phases

Phases encapsulate one or more related tasks and constitute the main steps of the business project. Phases are always performed sequentially. For each phase in a business project, you define its possible target phases and the conditions under which each target is appropriate. These conditions are called *transition rules*.

Order Capture business projects contain several phases. For example, the order business project (CORE\_ORDER\_BP) has eight main phases, but the quote business project (CORE\_QUOTE\_BP) has only two phases. These specific phases are explained below.

### Tasks

When you set up a phase, you define the sequence of tasks in the phase. Tasks are single actions that directly correspond to an Application Engine program or Data Mover script. A new task begins when all preceding tasks in a phase are complete.

Tasks within a single phase can be performed either in parallel or in sequence. To define tasks in parallel, you assign each task the same sequence number.

Sequence numbers for several tasks in Order Capture business projects have the same sequence number and are, therefore, performed simultaneously.

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**Note.** To view sequence numbers, access the Capture Type Workbench, Business Projects page.

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See [Chapter 4, “Setting Up PeopleSoft Order Capture,” Defining Business Process Conditions, page 58.](#)

### Transition Rules

Transition rules determine the transition from one phase to the next, based on the success or failure of tasks within the phase. The outcome of a task can be:

- *Cancelled.*
- *Complete - Success.*
- *Complete - Failed.*

### See Also

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

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

## Setting Up and Viewing Order Capture Business Projects

Out-of-the-box, PeopleSoft delivers hardcoded conditions to determine the triggering action that first launches the business project. These hardcoded conditions can be overridden by defining your own condition. This is done from the Capture Type Workbench: Set Up CRM, Product Related, Order Capture, Capture Type Workbench, in the Business Process Conditions page.

Click on the Edit button to edit the condition. You then use the AAF condition builder, selecting AAF Terms defined for Order Capture, and the proper operators and values.

When defining the Event Name within the Capture Type Workbench, the system is expecting certain names, and if an unrecognized name is used, it will assume that the Business Project tied to that event should always be run, depending on the condition defined. When no condition is defined for an unrecognized event name, the business project will always be run when an order is submitted.

This table lists the predefined event names:

Event Name	Description
CommChange	Communications Change Order in Service Management
CommActivateService	Communications Activate Service in Service Management
CommChangeService	Communications Change Service in Service Management
CommDisconnectService	Communications Disconnect Service in Service Management
CommResumeService	Communications Resume Service in Service Management

Event Name	Description
CommSuspendService	Communications Suspend Service in Service Management
CoreCancelService	Core Order Cancel Service in Service Management
CoreMaintBP	Core Order Maintenance
CoreOrderBP	Core New Order
CoreQuoteBP	Core New Quote
CoreRenewService	Core Order Renew Service in Service Management
ESAOOrderBP	Core Order with Proposal Management (Engagement Service products)
PACRequest	Port Authorization Code request in Service Management
PortInRequest	Port-In request in Service Management
Telco New Order BPEL	Communications New Order
CommSuspendChangeService	Communications Suspend and Change Service in Service Management

Access the Business Project Events page in Capture Type Workbench: Set Up CRM, Product Related, Order Capture, Capture Type Workbench, Business Project Conditions.

Here you can perform the following tasks:

- Add business project events that are triggered for the Order or Quote.
- Add business project events that are triggered for the Service Management Order.
- Enable or disable delivered business projects.
- Alter the sequence of the business project events so that they are triggered sequentially or in parallel.
- Allow multiple instances of the business project.

This task is recommended for Order Maintenance but not for Order or Quote.

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

---

## Viewing Order Capture Business Projects

This section discusses how to:

- View the Order Capture business project tree.
- View the order business project.
- View the order maintenance business project.

- View the quote business project.

**See Also**

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

**Page Used to View Order Capture Business Projects**

Page Name	Object Name	Navigation	Usage
Business Project Status	RC_BP_STATUS	Orders and Quotes, Search Orders and Quotes, Related Actions  Click the View Details button on the Related Objects page.	View the status of all three Order Capture business projects.

**Viewing the Order Capture Business Project Tree**

Access the Business Project Status page.

The screenshot displays the 'Business Project Status' page. At the top, there is a 'Refresh' button. Below it, the 'Business Project' section shows 'CORE\_QUOTE\_BP' with a description of 'Order Capture Quote BP' and a 'Type' of 'Main Business Project'. The 'Status' tab is active, showing 'Parent Object Information' as 'Capture ID-CRQ0300070' and a 'Status' of 'Complete'. The 'Business Project' section on the left features a '\*Tree Type' dropdown set to 'Task Tree' and navigation links: 'First | Previous | Next | Last | Left | Right'. A tree view shows four items: 'Order Email Confirmation Phase', 'Order Email Confirmation', 'Publish Order', and 'Publish New Order', each with a green checkmark icon. The 'Phase Detail' section on the right shows 'Phase' as 'Order Email Confirmation Phase', 'Status' as 'Complete', and 'Transition Rule' as 'All Complete All Success'. It includes a 'Target Phase' dropdown, a 'Comments' text area, and 'Last Maintained By' and 'Last Modified' fields. A 'Save and Update' button is located at the bottom right.

Business Project Status page

The Order Capture business project tree provides a visual representation of the business project. The left side of the page displays all phases and their possible targets. Clicking a phase causes the right side of the page to display details such as the phase's task list and the transition rules for each of its targets. The first phase appears at the top of the tree, and each time a transition to a different phase occurs, that new phase is added to the tree. Because business project definitions permit any phase to transition to any other phase, a single phase can be instantiated more than once and, as a result, can appear multiple times in the tree.

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**Note.** Only phases that have been instantiated appear in the tree. The system does not display future phases because it cannot tell which ones will be instantiated.

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<b>Status</b>	<p>Enter the overall status of the Order Capture business project. When you first invoke a business project, the status is <i>In Process</i>. You can manually change the status to <i>Cancel</i> any time before the business project is finished. When the project is finished, the system updates the status to <i>Complete</i>.</p> <p>You cannot manually set the business project status to <i>Complete</i>. The only way to complete a business project is to transition from the last activity either manually or automatically.</p>
<b>Outcome</b>	<p>Appears only for sub-business projects whose outcomes are set manually. Once the sub-business project is complete, set the outcome to either <i>Success</i> or <i>Failed</i>.</p>
<b>Description</b>	<p>Displays the text from the field specified on the Parent Object page of the business project definition. If the information is not descriptive enough, return to the parent object to modify it.</p> <p>The description is the only information provided about the parent object from which this business project was invoked.</p>
 and 	<p>These icons appear at the top level of the tree hierarchy. They indicate phases that have been instantiated. They enable you to expand and collapse the tree.</p>
	<p>Indicates the second level of the tree hierarchy.</p>
	<p>Indicates that the task or phase is in progress.</p>
	<p>Indicates that the task or phase is canceled.</p>
	<p>Indicates that the task was successfully completed or that the phase is complete.</p>

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**Note.** Phases do not distinguish between successful and unsuccessful completion.

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Indicates that the task has failed.

---

**Note.** This icon does not necessarily mean that the task will end. For example, the Order Maintenance business project automatically checks shipment status every 120 minutes. If no shipment has been made or if the order has not been canceled, the task displays this icon, and the business project repeats the task. The task continues to kick off every two hours (placing this icon in the Tree Viewer each time) until successful. For each instance of no shipment or order cancellation, you see this icon in the tree.

---

## Phase Detail

This region appears when you select a phase from the business project summary region.

<b>Phase</b>	Displays the name of the phase currently selected in the business project tree.
<b>Status</b>	Displays the phase status. Values are: <i>In Process</i> , <i>Complete</i> , or <i>Canceled</i> . (If you cancel a business project, the phase that was in progress is also canceled.)  Phase statuses don't distinguish between successful and unsuccessful completion.
<b>Transition Rule</b>	Displays how the system transitioned to the selected phase, or indicates that transition was performed manually. If the phase is not complete, no text appears.
<b>Target Phase</b>	To make a manual transition, select the next phase and save the page. You can do this only if the transition definition specifies a manual transition.  Manually transitioning out of a phase changes the source phase's status to <i>Complete</i> , but it does not affect the status of any of the incomplete tasks in the source phase.

## Updating the Tree

<b>Save and Update Tree</b>	Click to save changes to the page and to update the business project tree based on those changes. For example, click this button to complete a manual transition after you select a phase from the Target Phase drop-down list box.
-----------------------------	---

## Viewing the Order Business Project

Access the Business Project Status page.

Business Project Status page

## Order Business Project Phases

### Contract Request

When the PeopleSoft Contracts integration is in effect, this phase examines the Contract Mapping table for the Customer and Business Unit on the order to determine if a Contract number exists. If it does, this phase is marked complete. If no Contract number exists for this customer and business unit, a Contract Request message is sent to the PeopleSoft Contracts system, and the phase waits until PeopleSoft CRM receives a response from PeopleSoft Contracts with the contract number. Once the response is received, this phase is marked *Complete*.

If the Transaction Billing Processor (TBP) integration is not active, this phase is *Complete* and the next phase of the business project executes.

---

**Note.** The Workflow Rule RO Contract Request, which is the event performed by the CONTRACT\_REQ task, runs the Application Engine program RO\_CONTR\_EIP.

---

### Installed Product Creation

For order lines that require installed products, this phase creates the installed products with the status as indicated in the Product Definition component. The order may contain products that require an installed product, as indicated by the Installed Product page in the Product Definition component.

In addition, when creating installed products for serialized items, the system creates one installed product for each quantity ordered. For nonserialized items, the system creates a single installed product for the entire quantity ordered on the order line.

Installed products contain values from the order, such as customer information, site, order ID, and quantity ordered.

---

**Note.** The Workflow rule RO\_Create Inst Prod, which is the event performed by the CREATE\_IP task, runs the Application Engine program RO\_CREATE\_IP.

---

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

### Agreement Creation

When the order contains an agreement product, the Agreement Creation Phase creates the new agreement or updates the existing agreement with the products being covered.

---

**Note.** The Workflow rule RO\_Create Agreement, which is the event performed by the CREATE\_AG task, runs the Application Engine program RO\_CREATE\_AG.

---

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

### Publish Order

When the order is fulfilled by an external system, this phase publishes the order details, provided the application message CRM\_SALES\_ORDER is active.

When the TBP integration is in effect and the order contains service or agreement products, this phase publishes the CONTRACT\_TXN application message if the message is active.

---

**Note.** The Workflow rule RO\_EIP Publish, which is the event performed by the PUB\_NEW\_ORDER task, runs the Application Engine program RO\_EIP\_PUB.

---

See [Chapter 8, “Integrating with Fulfillment and Billing Systems,” page 125](#).

### Order Email Confirmation

This phase uses the Multi-Channel Framework to send an email confirmation to the primary email address of the contact on the order. On completion of this phase, the system creates a *correspondence* entry on the Related Objects page of the order. The confirmation email provides a current snapshot of the order, including order number, status, order line details, order totals, and shipping details.

If no primary email address exists for the order contact, no email confirmation is sent.

---

**Note.** The Workflow rule, RO Order Email Confirmation, which is the event performed by the ORDER\_EMAIL task, runs the Application Engine program RO\_SND\_EMAIL.

---

**Shipment Completion**

This phase examines the status of the order header for a *Completed* or *Cancelled* status. If the order is found to be complete or canceled, this phase exits with a *Successful* status.

If the order contains service or agreement products, the order line status for these products will be set to *Complete* as no fulfillment process is necessary. If this order contains *only* service or agreement products, the order header status will be set to *Completed* and this phase exits with a *Successful* status.

Should this order contain products requiring fulfillment, this phase will wait until the fulfillment process notifies the business project that all lines are fulfilled. This can happen through the Advanced Shipping Notice, Sales Order Status, or Real-Time Status integration points. Once the business project is notified that all lines are fulfilled, this phase exits with a *Successful* status.

---

**Note.** The Workflow rule RO\_Check Shipment Completion, which is the event performed by the CHK\_SHP\_COMPLETE task, runs the Application Engine program RO\_SHP\_OVR.

---

**Service Order Creation**

Installed products created in an earlier phase may need a service order. This phase creates service orders for any installed products that are flagged as Service Order Required on the Product Definition page. The service listed on the Product Definition page is used to create the service orders. This phase is the final phase of the business project, and it does not run until the order is completed or canceled.

---

**Note.** The Workflow rule RO\_Create Service Order, which is the event performed by the CREATE\_SO task, runs the Application Engine program RO\_CREATE\_SO.

---

## Viewing the Order Maintenance Business Project

Access the Business Project Status page.

### Order Maintenance Business Project Phases

**Order Email Confirmation**

This same phase is used in the Order Capture business project. It provides a current snapshot of the order following order maintenance.

**Publish Order Change**

When the order is to be fulfilled by an external system, this phase publishes the order maintenance details, if the application message CRM\_SALES\_ORDER\_CHANGE is active.

When the PeopleSoft Contracts integration is in effect and the order contains service or agreement products, this phase publishes the CONTRACT\_TXN application message if the message is active.

---

**Note.** The Workflow rule RO EIP Change Pub, which is the event performed by the PUB\_CHG\_ORDER task, runs the Application Engine program RO\_EIP\_CHPUB.

---

See [Chapter 8, “Integrating with Fulfillment and Billing Systems,” page 125](#).

**Order Changes Complete**

This phase examines the status of the order history (RO\_HISTORY) by looking for any change history records with *Open* status. If no open history

records are found, this phase exits with a successful completion. If the open history records exist, this phase will wait until it is notified that the changes have been processed.

The Sales Order Change Notice integration point informs the business project that the requested changes were processed and allows this phase to exit with a *Successful* status.

---

**Note.** The Workflow rule RO\_Check Order Changes, which is the event performed by the CHK\_ORDCH\_COMPL task, runs the Application Engine program RO\_ORDCH\_OVR.

---

### Installed Product Creation

The order may contain products that require an installed product, as indicated by the Installed Product page in the Product Definition component. For any order lines that were maintained that require installed products, this phase adds, changes, or deletes the installed products as necessary.

Maintenance actions involved in adding, creating, or deleting installed products include adding new lines to the order, changing the quantity of existing lines on the order, or canceling lines on the order.

In addition, when creating installed products for serialized items, the system creates one installed product for each quantity ordered. For nonserialized items, the system creates a single installed product for the entire quantity ordered on the order line.

Installed products inherit values from the order, such as the customer information, site, order ID, and quantity ordered.

---

**Note.** The Workflow rule RO\_Create Inst Prod, which is the event performed by the CREATE\_IP task, runs the Application Engine program RO\_CREATE\_IP.

---

### Order Notification

This phase determines the confirmation or rejection of the requested order maintenance by examining the order history (RO\_HISTORY). Should notifications be required for the order, as defined in the Order Capture business unit setup, this phase uses correspondence management to create a maintenance confirmation email, and may also create a worklist entry for the customer service representative who entered the most recent order maintenance.

---

**Note.** The Workflow rule RO Order Change Notification, which is the event performed by the ORDER\_NOTIFY task, runs the Application Engine program RO\_ORD\_NOTIF.

---

See [Chapter 8, “Integrating with Fulfillment and Billing Systems,” page 125](#).

## Viewing the Quote Business Project

Access the Business Project Status page.

**Business Project Status**

Refresh

<b>Business Project</b> CORE_QUOTE_BP	<b>Type</b> Main Business Project
<b>Description</b> Order Capture Quote BP	

<b>Status</b>	<b>Definition</b>
---------------	-------------------

<b>Parent Object Information</b>	<input style="width: 90%;" type="text" value="Capture ID-CRQ0300078"/>
<b>Status</b>	Complete

**Business Project**

*Tree Type	Task Tree
------------	-----------

First | Previous | Next | Last | Left | Right

- Order Email Confirmation Phase
- Order Email Confirmation
- Publish Order
- Publish New Order

**Phase Detail**

<b>Phase</b>	Order Email Confirmation Phase
--------------	--------------------------------

<b>Status</b>	Complete
---------------	----------

<b>Transition Rule</b>	All Complete All Success
------------------------	--------------------------

<b>Target Phase</b>	<input style="width: 90%;" type="text"/>
---------------------	--

<b>Comments</b>	<input style="width: 90%;" type="text"/>
-----------------	--

<b>Last Maintained By</b>	JPEPPER
---------------------------	---------

<b>Last Modified</b>	06/04/2004 2:58PM
----------------------	-------------------

Business Project Status page

## Phases

**Order Email Confirmation** This is the same phase that is used in the Order Capture business project. It provides a current snapshot of the quote.

**Publish Order** When using an external fulfillment system, this phase publishes the quote details if the application message CRM\_QUOTE is active.

---

**Note.** The Workflow rule RO\_EIP Publish, which is the event performed by the PUB\_NEW\_ORDER task, runs the Application Engine program RO\_EIP\_PUB.

---

See [Chapter 8, “Integrating with Fulfillment and Billing Systems,”](#) page 125.

## See Also

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

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## Viewing the Order Bridge

This section discusses how to view the Order Bridge.

---

**Note.** . The Order Bridge displays only business project instance details; it does not display the details of instances of business processes, which are created externally by web services.

---

### See Also

Defining Order Capture Business Units

## Page Used to View the Order Bridge

Page Name	Object Name	Navigation	Usage
Fulfillment	RO_FULFILLMENT	<ul style="list-style-type: none"> <li>Orders and Quotes, Add Order, Order, Fulfillment</li> <li>Orders and Quotes, Search Orders and Quotes, Order, Fulfillment</li> </ul>	View detailed order-related events.

## Viewing the Order Bridge

Access the Fulfillment page.

**Order**

Copy to Quote | Clone | Search | Next | Previous | Add | Update | Refresh | >> | Personalize

**Order ID** CR00307097      **Order Status** Complete Order  
**Customer** [Advanced Consulting](#)      **Customer Value** Gold★★★★  
**Contact** [Mary Lewis](#)      **Credit Rating** 0

Entry Form | Line Details | Holds | Notes | Related Actions | History | **Fulfillment**

Go To: Select One...

---

**Business Projects** Find First 1 of 1 Last

**Business Project** Order Capture BP  
**Status** Complete      **Created** 05/18/2005 2:10:10PM

**Phases, Tasks, and Events** View 5 First Last

Item	Description	Run Status	Created	ID
Phase	Contract Request Phase	Complete	05/18/2005 2:10:10PM	
Task	Contract Request	Complete	05/18/2005 2:10:10PM	
-- AppEngine	RO_CONTR_EIP	Success	05/18/2005 2:10:11PM	<a href="#">11083</a>
-- AppEngine	RO_CONTR_EIP	Success	05/18/2005 2:11:25PM	<a href="#">11085</a>
-- Message	CONTRACT_REQUEST	DONE	05/18/2005 2:10:29PM	<a href="#">3</a>
Phase	Installed Product Creation Ph.	Complete	05/18/2005 2:11:47PM	
Task	Create Installed Products	Complete	05/18/2005 2:11:47PM	
-- AppEngine	RO_CREATE_IP	Success	05/18/2005 2:11:47PM	<a href="#">11086</a>
Phase	Agreement Creation Phase	Complete	05/18/2005 2:12:09PM	
Task	Create agreement	Complete	05/18/2005 2:12:09PM	
-- AppEngine	RO_CREATE_AG	Success	05/18/2005 2:12:10PM	<a href="#">11088</a>
Phase	Publish Order	Complete	05/18/2005 2:12:21PM	
Phase	Order Email Confirmation Phase	Complete	05/18/2005 2:12:39PM	
Phase	Shipment Completion	Complete	05/18/2005 2:13:59PM	
Phase	SO Creation	Complete	05/18/2005 2:14:26PM	

Fulfillment page

- Business Project**      A business project is a structured, workflow-enabled task list. It is used to coordinate and track the work involved in performing tasks. Usually, only one business project exists per order.
  
- Phase**      A phase is a group of tasks. Each phase has to be completed before it will transition to next one. A phase is completed when all tasks are completed or failed.
  
- Task**      Basic unit of business projects.
  
- Event**      An event is any transaction created in the system. It might occur in different components, and is uniquely identified.
  
- Integration Broker**      PeopleSoft Integration Broker facilitates synchronous and asynchronous messaging with other PeopleSoft applications and with third-party systems. PeopleSoft Integration Broker uses a variety of communication protocols, while managing message structure, message content, and transport disparities.
  
- Application Engine Process**      An Application Engine process is run for automatic tasks. It might create messages, sub-business projects, and transition to next task.
  
- Sub-business project**      Sub-business projects are business projects that are incorporated into phases of other business projects.



## CHAPTER 7

# Integrating Product Configuration

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

- Set up PeopleSoft Advanced Configurator for integration.
- Set up Order Capture to integrate with Advanced Configurator.
- Create Advanced Configurator schemas.
- Access the Advanced Configurator.
- Set up configured packages and products.

---

## Understanding Integration with PeopleSoft Enterprise Order Capture Applications

A customer or service agent using a PeopleSoft CRM Order Capture application can sign in to Order Capture, create a new order or open an existing one, click the Configurator icon on the Order page, display the product configuration page, make changes to the order, save it, and pass the configuration and order data to the CRM system for storage or further processing. Users can perform these operations from PeopleSoft Enterprise Order Capture and Order Capture Self Service.

Integrating Advanced Configurator enhances:

- Quote and order processes.
- Pricing.
- Installed product configuration and service maintenance.

When integrated with Order Capture applications, Advanced Configurator:

- Ensures that the product selections are compatible and correct.
- (Optionally) provides the list price of the configured product.

This price may be further surcharged or discounted by the Enterprise Pricer engine.

- Calculates and displays delta pricing, in which users can observe the effects of their selections on pricing.
- Displays the details of a configuration within Order Capture.
- After the configuration session, returns the user to the calling component (such as Order Capture).

## Insurance and Financial Products

Agents can use Order Capture to take applications for financial services and process them. If the services are configurable, the configuration interface appears for selections to be made. When the session is complete, the agent returns to the order form and continues. Customers can perform these actions through Order Capture Self Service.

Similarly, insurance products such as coverages and deductibles are more efficiently ordered and maintained when you use the integrated Advanced Configurator.

## Service Products

Users can quote and order services through Order Capture. If the services are configurable, the user can access the configuration page from the order or quote in the same way as any other configurable product.

## See Also

*PeopleSoft Enterprise Advanced Configurator 9 PeopleBook*, “PeopleSoft Enterprise Advanced Configurator for CRM Preface”

---

# Working with PeopleSoft Advanced Configurator

This section provides an overview and discusses how to:

- Set up Order Capture to integrate with Advanced Configurator.
- Create Advanced Configurator schemas.
- Access Advanced Configurator.

## Setting Up Advanced Configurator for Integration

Perform the following steps to set up your PeopleSoft Advanced Configurator integration with PeopleSoft CRM.

1. Install PeopleSoft Advanced Configurator Server and deploy the desired solutions on this Configurator Server.

See *PeopleSoft Enterprise CRM 9 Installation Guide*

2. Navigate to PeopleTools, Integration Broker, Gateways, and click the Search button on the Gateways search page.

This accesses the Gateway ID: LOCAL page.

3. Enter the Gateway URL as `http://<< PeopleSoft Web Server >>/PSIGW/PeopleSoftListeningConnector`, and click Save.

---

**Note.** Remember that the URL is case-sensitive.

---

4. Load the Connector information by clicking the Load button.

A *Loading Process was successful* message appears.

5. Click OK to continue.
6. A grid appears.

This grid displays all of the loaded connectors. For each connector ID, a connector class name exists. Click Save.

7. Click the Refresh button next to Refresh Integration Gateway.properties file.  
A *Gateway Refresh Process was successful* message appears.
8. Click OK to continue, then Save.
9. Access the Node Definitions page from PeopleTools, Integration Broker, Node Definitions.
10. Open node PSFT\_CFG.
11. On the Connectors tab for the new node name, (where the value of Gateway ID should be LOCAL and Connector ID should be HTTPTARGET), change the “PRIMARYURL” property to be the URL of your Advanced Configurator server. (The URL is case-sensitive.)

---

**Note.** Advanced Configurator integration does not support URLs beginning with *https* for use with Secure Socket Layers (SSL).

---

12. Save these settings.
13. Enter PSFT\_CFG in the Message Node Name field.  
You may want to set up two nodes: one for internal-facing applications and one for Self Service (external) applications. If so, you can create another node that is identical to the shipped PSFT\_CFG node in every respect other than its name and the associated URL.
14. Navigate to the Installations page (Set Up CRM, Product Related, Advanced Configurator, Installation) and identify an internal node, an external node, or both.  
The internal node is used for all internally facing applications. The external node is the one that is used for all Self Service applications.
15. Navigate to the Schemas page (Set Up CRM, Product Related, Advanced Configurator, Schemas) to create schemas and link them to solutions on the PeopleSoft Advanced Configurator Server.  
See *PeopleSoft Enterprise Advanced Configurator 9 PeopleBook*, “Setting Up Integration,” Creating Advanced Configurator Schemas.
16. When you set up items, products, or packages in the PeopleSoft CRM Item Definition and Product Definition components, be sure to link them to the correct PeopleSoft Advanced Configurator schemas that were established in step 5.

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

---

## Setting Up Order Capture to Integrate with Advanced Configurator

This section discusses how to set up Order Capture to integrate with Advanced Configurator.

## Page Used to Set Up Order Capture to Integrate with Advanced Configurator

Page Name	Object Name	Navigation	Usage
Installation Table	CFG_SETUP	Set Up CRM, Product Related, Advanced Configurator, Installation, Installation Table	Use the Installation Table page to associate configuration messaging nodes with CRM Applications and enable Configurator debugging

## Associating Advanced Configurator Messaging Node and Enabling Debugging

Access the Installation Table page.

The screenshot shows the 'Installation Table' page. Under the 'Integration Broker Setup' section, there is a dropdown menu for '\*Configurator Server Node' set to 'Define Internal/External Nodes'. Below it are two text input fields: 'Internal Node' and 'External Node', both containing the value 'PSFT\_CFG'. Under the 'Configurator Debug Information' section, there is a 'Debug' dropdown menu set to 'Off'.

Installation Table page

The Installation Table page enables you to specify the PeopleSoft Enterprise Integration Broker Messaging Node for internal CRM applications, such as Order Capture. You also can specify an external node for customer-facing applications such as Order Capture Self Service. Be sure to specify at least one node; otherwise, an error message is generated. Order Capture and Order Capture Self Service use these nodes to call out to the Advanced Configurator server at run time.

### Integration Broker Setup

**Configurator Server Node** Select *Define External Node Only*, *Define Internal Node Only*, or *Define Internal/External Nodes*, depending on whether you want to use Advanced Configurator with internal applications, self-service CRM applications, or both. When using both internal and external CRM applications, you can define a separate node for the self-service application so that transactions are stored on a separate, secure server.

---

**Note.** The Internal Node and External Node fields appear or disappear depending on your selection.

---

### Internal Node

Enter a configurator node name. This node is used to integrate the configurator server with internal-facing CRM applications, such as Order Capture.

---

**Note.** Nodes are available from the drop-down list, which prompts against the PSMMSGNODEDEFN table.

---

**External Node**

Enter a configurator node name. This node is used to integrate the configurator server with customer-facing CRM applications, such as Order Capture Self Service.

**Configurator Debug Information****Debug**

When you turn debugging on, raw configuration details are displayed in XML format at runtime. Specifically, this means that when you have completed your configuration session, you are presented with two pages prior to returning to the application that invoked PeopleSoft Advanced Configurator. These two pages contain an XML request and an XML response. The XML request page displays the XML data that was sent to the configurator server to retrieve information about the configuration; the XML response page displays the XML data that was returned by the configurator server. This is a useful tool for debugging your schemas because you can quickly verify that XML configuration details are being returned from the calling application just as you would like them to be. When you turn debugging off (default), you do not see the two XML pages prior to returning to the calling application from your configuration session.

The Configurator Solution Tester also enables this request and response XML to be displayed, as well as providing further debugging options.

---

**Note.** Log files are available from the appropriate directory on the configurator server when Configurator Debug is activated. For example, if your Advanced Configurator server is running on Microsoft Windows, the logs are stored in C:\bea\weblogic81\config\CalicoDomain\logs.

---



---

## Creating Advanced Configurator Schemas

This section provides an overview of configurator schemas and discusses how to:

- Create schemas for external solutions.
- Create schemas for internal solutions.
- Establish configuration display and pricing options.
- Specify request details.

## Understanding Configurator Schemas

Configuration schemas establish the display, pricing, and configuration details for specific a configuration and what information to retrieve from the configuration models on the configurator server. Three schema setup pages are available for Advanced Configurator: Display, Price, and Request Details.

The Request Details page enables you to specify in detail what the request will look like that goes from Order Capture to the Advanced Configurator server and in turn, what details on the configuration will be returned to Order Capture from the Advanced Configurator server (all by way of XML). Finally, it enables you to specify what XSLT StyleSheet to use when rendering the configuration details to the user in HTML on the line details page of Order Capture.

## External Solutions and Internal Solutions

Two types of configurator schemas are available: externally created solutions and internally defined solutions. External and internal solutions can be distinguished like this:

**External Solution** Enables you to direct runtime data from the model to an HTML-based UI that is built specifically for this solution with JSP and external HTML editing tools (such as Macromedia Dreamweaver).

---

**Note.** Templates for Macromedia Dreamweaver are bundled with the Advanced Configurator application.

---

**Internal Solution** Enables you to define the user interface from within the PeopleSoft CRM schema setup pages.

## Pages Used to Create Advanced Configurator Schemas

Page Name	Object Name	Navigation	Usage
Display	CFG_SCHEMA_DISPLAY	<ul style="list-style-type: none"> <li>Set Up CRM, Product Related, Advanced Configurator, Schemas, Schema Setup</li> <li>Set Up CRM, Product Related, Advanced Configurator, Schemas, Display</li> </ul> Select Internal Solution.	Define the Configuration User Interface to be displayed at run time.
Price	CFG_SCHEMA_PRICE	Set Up CRM, Product Related, Advanced Configurator, Schemas, Price	Specify options to return the configuration list price, as well as to establish recurring pricing for configured products.
Request Details	CFG_SCHEMA_OUTPUT	Set Up CRM, Product Related, Advanced Configurator, Request Details	Define the configuration details to be sent to and received from the configurator server.

## Creating Schemas for External Solutions

Access the Display page.

Display page for external solution

**Schema ID** The schema ID is a unique identifier for the configuration schema. The schema ID is the identifier that is associated with an item or product so that the system knows how to properly configure the product or package.

---

**Note.** The schema ID should match the solution ID if you are using an external solution.

---

**Description** Enter a description for the schema ID.

### Solution Properties

**Frame Dimensions** Specify the width and height of the embedded, runtime configuration page in pixels.

---

**Note.** When you save the page, validation logic ensures that neither page width nor height are fewer than 800 pixels.

---

**Solution Type** Select *External Solution* to select from the existing (externally defined) sets of configurator solutions on the configurator server.

**External Solution** When the solution type is *External*, you use a predetermined list of solutions, each of which already has the user interface display set. Click the Lookup button to select an external (predefined) solution from a list of all the current configurator solutions that exist on the configurator server.

**Solution Tester** Select to launch the Configurator Solution Test tool, which displays the user interface for this solution ID.

**Model Tester link** Select to test model functionality for the underlying model of this solution ID.

## Creating Schemas for Internal Solutions

Access the Display page.

Display Price Output

---

**Schema ID** JT12

**\*Description**

---

**Solution Properties**

**Frame Dimensions**  x

**\*Solution Type**

**\*Configuration Type**

**Model ID**

**Use Most Current Version**

**Model Version**  .

[Solution Tester](#)  
[Model Tester](#)

Display page for internal solution (1 of 3)

**Display Properties**

**Page Title**  **\*Restore Policy**

---

**Page Information** Find | View All First  Last

**\*Tab**  **Tab Caption**

**Number of Columns**

---

**Control Setup** Find | View All First  Last

**\*Sequence**  **\*Type**

**Name**  **Attribute**

**Caption**  **\*Control Type**

**\*Field Processing**

---

**Display Options**

**Show Violations**
 **Show Eliminated**
 **Show Delta Price**

Display page for internal solution (2 of 3)

**Captions**

**Return**  **Update**

**Cancel**  **None**

---

**Miscellaneous**

**Validate on Return**
 **Show Configuration List Price**
 **Show Application Violations**

Display page for internal solution (3 of 3)

---

**Note.** This page appears when you select a solution type of *Internal Solution*. This page enables you to specify your own solution type instead of choosing one from the default list that is available when you select an external solution.

---

**Schema ID** The schema ID is a unique identifier for the configuration schema.

**Description** Enter a unique description for the schema ID.

### Solution Properties

**Frame Dimensions** Specify the width and height of the runtime configuration page in pixels.

---

**Note.** When you save the page, validation logic ensures that neither page width or height are fewer than 800 pixels.

---

**Solution Type** Select *Internal Solution*, which enables you to define your own solution without returning to the environment of the PeopleSoft Advanced Configurator.

---

**Note.** When you select *Internal Solution*, the page is updated to display additional sections, which are explained subsequently.

---

**Configuration Type** Select *Component* when the solution contains a single model. Select *Compound* if the solution contains multiple models. If you select *Component*, the list displays only the solutions on the server that contain a single component model. Likewise, selecting *Compound* displays a list of the solutions on the server that contain multiple models.

---

**Note.** If you select *Component*, all fields on the Display page will be available for updating.

---

If you select *Compound*, the only modifiable fields will be the Compound ID, Model Version, Page Title, Validation on Return, and Captions fields. You need to have the individual component schemas already defined.

**Model ID or Compound ID** Select a model ID (or, in the case of a compound model, a compound ID) for the internal solution.

**Use Most Current Version** Select to use the most current model.

---

**Note.** When you select this check box, the Model Version options disappear.

---

**Solution Tester** Click to launch the Configurator Solution Test Tool, which launches the model, any database connections, and the actual user interface. Use this tool to verify that the results from the business logic are properly displayed and to check and tune presentation layout (if it is a custom UI) and navigation. This link is keyed by solution ID.

**Model Tester** Click to test constraints and conditions that are defined in the model. A test UI is launched, so you can divide testing into two phases: business logic (model constraints and calculations) and presentation (UI, using the Solution Tester). This link is keyed by solution ID.

## Display Properties

<b>Page Title</b>	Enter a title for the configuration display.
<b>Restore Policy</b>	You can select a restore policy that selects either the original model version or the most current model version. This option gives you control over whether the user's older, saved configurations are run against the newest model version if the user requests a saved configuration to view or to use as the basis for a new configuration. The problem to consider is whether the new model, which can change substantially through updates, can properly display and process configuration data that is produced by an older model.

## Page Information

<b>Tab</b>	You can control the number of tabs that appear on the page. Enter the number of the tab here, and make your selections for the content of the tab in the Control Setup section.
<b>Tab Caption</b>	Define a label for each tab.
<b>Number of Columns</b>	Define the number of column controls that you want to appear in the configuration page for this tab.

## Control Setup

<b>Sequence</b>	Determine the sequence of the controls that are displayed on the tabs that you create for the configuration page.
<b>Type</b>	Select <i>Configuration Attribute</i> , <i>Expression</i> , <i>External Variable</i> , or <i>Selection</i> .
<b>Name</b>	Enter a name for the configuration attribute, expression, external variable, or selection.
<b>Attribute</b>	Define the attribute that appears in the drop-down list or as a radio button selection.
<b>Caption</b>	Enter a descriptive caption that appears on the page.
<b>Control Type</b>	Select to render the control type as either a dropdown list, or radio button.
<b>Field Processing</b>	Select whether this runtime page uses dynamic or deferred processing. The <i>Dynamic</i> option causes the page to refresh automatically when the user enters data and presses the Tab key to move out of a field. The <i>Deferred</i> option leaves processing until the user clicks the Submit button.
<b>Control Size</b>	Specify the maximum number of characters to allow in the control. This option appears if the control type is Configuration Attribute or External Variable.

## Display Options

These options appear only for control type Selection.

<b>Show Violations</b>	Select to display red violations text on the selections.
<b>Show Eliminated</b>	Select to show options that are constrained away by previous selections. If this check box is cleared, invalid selections will not appear at all.

**Show Delta Price** If you have pricing information, select this check box to display pricing change in the form of how much has been added to or subtracted from the price. This is also known as the ability to show *plus-minus pricing*.

**Captions**

**Return, Return to Manager, Cancel, Update, and None** Specify the text to use on the labels of the action buttons. These buttons will be viewable on the configuration page. Return, Cancel, Update, and None are available for component models. Return, Cancel, and Return to Manager are available for compound models.

**Miscellaneous**

**Validate on Return** Select to check the validity of the configuration before returning to the calling CRM application.

**Show Configuration List Price** Select to display the list price at the top of the configuration page.

**Show Application Violations** Select to show violation messages during product configuration. These violation messages appear at the top of the configuration page in a red text and red button format.

**Establishing Configuration Display and Pricing Options**

Access the Price page.

Schema ID: WALKIN\_FREEZER  
 \*Description: Walk-in Freezer

Price Mode: Mode: Standard / Advanced

Pricing Properties: \*List Price Source: Configurator

Type	Name	Lookup Selections	Attribute	Operator	Type	Name	Lookup Expressions	Delta Price Only		
Selection	CoolingUnitsSelection	Q	LIST_PRICE	Multiply	Expressio	fxCurrencyFa	Q	<input type="checkbox"/>	+	-
Selection	DoorsFrontSelection	Q	LIST_PRICE	Multiply	Expressio	fxCurrencyFa	Q	<input type="checkbox"/>	+	-
Selection	DoorsLeftSelection	Q	LIST_PRICE	Multiply	Expressio	fxCurrencyFa	Q	<input type="checkbox"/>	+	-
Selection	DoorsRearSelection	Q	LIST_PRICE	Multiply	Expressio	fxCurrencyFa	Q	<input type="checkbox"/>	+	-
Selection	DoorsRightSelection	Q	LIST_PRICE	Multiply	Expressio	fxCurrencyFa	Q	<input type="checkbox"/>	+	-

\*Recurring Price Source: Product Definition

Price page (1 of 2)

*Recurring Price Source			Configurator
<b>Recurring Price</b>			
<u>Recurring</u>	<u>Expression</u>		
Recurring Price	<input type="text"/>		
Recurring Frequency	<input type="text"/>		
Frequency Description	<input type="text"/>		

Price page (2 of 2)

## Price Mode

The Price Mode group box appears when you specify *Configurator* in the List Price Source option.

**Mode** Indicates which price mode, Standard or Advanced, is employed to define the pricing schema as shown on the Configuration List Price grid. Clicking the *Advanced* link makes operators and expressions available to further define each control's pricing.

Click Standard to change the mode from Advanced and remove the operators and expressions. See the following explanation.

## Pricing Properties

**List Price Source** Select *Configurator* or *Product Definition* to indicate whether to draw pricing data for the controls from the configurator model or from the product definition.

Selecting *Configurator* displays the Configurator List Price grid, in which you specify the controls to be priced and their definitions. The product definition contains this information already.

## Configuration List Price

The configuration list price is a list price. PeopleSoft Enterprise Pricer can act further on this price and may place a surcharge on it or discount it, depending on the setup in the Enterprise Pricer application. However, you can operate on these values using the Operator drop-down described subsequently. In addition, the values that are represented on each of the rows in the grid are summed to yield the total price.

This section is available only when you have selected *Configurator* in the List Price Source field.

**Type** Select *Expression* to identify and define an expression from the configurator model to be used to deliver a list price. Select *Selection* to indicate that an attribute of the specified selection is the source for a list price for that selection.

---

**Note.** When the Type is Expression, Name is the only field available for editing. The Delta Price Only check box remains available for selection.

---

**Name** Type or select a name for the selection or expression from the Name lookup list. Names are supplied by the model.

**Attribute** Select the attribute of the specified selection from which to take the list price value.

<b>Operator</b>	Appears when Price Mode is set to Advanced. Use the Operator drop-down list to define an expression to operate on the list price that is passed to it from the left-hand side of the row.
<b>Delta Price Only</b>	Select to return delta price information for the selection or expression. Delta information is a price value that indicates the difference, plus or minus, that the picking of a particular selection had on a price. Delta pricing must be enabled in the model as well.
<b>Recurring Price Source</b>	Select <i>Product Definition</i> to indicate that recurring pricing information is to be taken from the product definition. Select <i>Configurator</i> to define the source for recurring pricing for the product. The Recurring Price grid appears when you select the <i>Configurator</i> option.

## Recurring Price

<b>Recurring and Expression</b>	Select expressions, defined in the configurator model, for: <ul style="list-style-type: none"><li>• Recurring Price: Select an expression that provides a value for a recurring charge to be added to the list price.</li><li>• Recurring Frequency: Select an expression that defines which recurring frequency to use when you add the recurring charge order line, for example, MNTHLY.</li><li>• Frequency Description: Select text that describes the recurring frequency in words, such as Monthly.</li></ul>
---------------------------------	---

## Specifying Request Details

Access the Request Details page.

Display
Price
Request Details

**Schema ID** WIRELESS\_SERVICE

**\*Description**

---

**Request Details**

**\*Request Message**

**\*Render With**  [Define Stylesheet](#)

**Request the Following**

<input checked="" type="checkbox"/> Configuration Details	<input checked="" type="checkbox"/> Package Components	<input type="checkbox"/> Product Selector
<input type="checkbox"/> Purchased Components	<input type="checkbox"/> Manufactured Components	<input type="checkbox"/> Routing Operations
<input checked="" type="checkbox"/> Delta Information		

▼ **Configuration Details** Find | View All    First ◀ 1 of 1 ▶ Last

**Section 1**

**Description**

**Selections**

**Attributes**

**Expressions**

**External Variables**

**Configuration Attributes**

Request Details page (1 of 2)

**Display Options**

Display Component Violations       Display Selection Violations

---

▼ **Package Components** Find | View All |    First ◀ 1-4 of 4 ▶ Last

Name	Attribute		
<input type="text" value="Additional Features"/>	<input type="text" value="ShortName"/>		
<input type="text" value="Anytime Minutes"/>	<input type="text" value="ShortName"/>		
<input type="text" value="Mobile-to-Mobile Minutes"/>	<input type="text" value="ShortName"/>		
<input type="text" value="Weekend Minutes"/>	<input type="text" value="ShortName"/>		

Request Details page (2 of 2)

You should recognize that the Request Details page is affected by the Configuration Type option on the Display page, but is not affected by Solution Type. The option to include components, connections, and structure in the configuration details is not available for the configuration type of *Component*. However, all options on the Request Details page are available to the user when the configuration type is *Compound*.

## Request Details

### Request Message

Specify a *Custom XML* or *Default XML* output. Configuration details are in XML, and a default XSLT is provided with Configurator. Select *Custom XML* to access a text entry field where you can define a request.

<b>Define Request</b>	When you select <i>Custom XML</i> , the Define Request link appears. Click the link to access a text entry field into which you can enter the XML request.
<b>Render With</b>	<p>Enter <i>Custom Stylesheet</i> or <i>Default Stylesheet</i> stylesheet to determine how the information that is returned by the request is displayed. When you select the <i>Custom</i> option, the Define Stylesheet link appears and you can define your own stylesheet.</p> <p>By using a custom stylesheet, you can change the order in which the information is displayed or the amount of information displayed. For example, a custom stylesheet could be used to display expressions first, followed by selection points, and then conflicts. Or you could display just the selection points with selections and not bother to display the actual domain members that are selected or their quantity.</p>
<b>Define Stylesheet</b>	Click to define a custom XSLT stylesheet for this schema ID. The link accesses a page containing a large text entry field into which you can insert a text defining a stylesheet.
<b>Request Properties</b>	
<b>Configuration Details</b>	Select this check box to request configuration details that are provided by Configurator. When you select this box, a Configuration Details group box appears and enables you to make detailed selections. The Configuration Details options determine what is included in part of the default xml request.
<b>Package Components</b>	Select to choose name and attribute options for package components. A Package Components grid appears at the bottom of the page. A package component is one of many products that will eventually make up a package. For example, a computer product may actually consist of several products such as a monitor, keyboard, and mouse, as well as the actual computer.
<b>Product Selector</b>	Select to choose name and attribute options for product selections. A Product Selector grid appears at the bottom of the page. The option replaces the product ID on the order capture line with the product ID that is specified in the chosen selection point.
<b>Purchased Components</b>	Select to choose name and attribute options for purchased components. A Purchased Components grid appears at the bottom of the page. Selecting this option categorizes purchased components for display purposes; no additional processing is performed.
<b>Manufactured Components</b>	Select to choose name and attribute options for manufactured components. A Manufactured Components grid appears at the bottom of the page. As with Purchased Components, selecting Manufactured Components categorizes manufactured components for display purposes; no additional processing is performed.
<b>Routing Operations</b>	Select to choose name and attribute options for routing operations. A Routing Operations grid appears at the bottom of the page. As with Purchased Components, selecting Routing Operations categorizes routing operations for display purposes; no additional processing is performed.
<b>Delta Information</b>	Requests the display of the differences between this configuration and the last submitted configuration. Differences include additions, deletions, and changes to selection points, expressions, and externs.

**Compound Violations** Select to return a list of configuration violations for a solution based on a compound model. This check box is displayed only when you select a configuration type of Compound on the Display page.

## Configuration Details

Options in this section of the page determine what information about the configurations that are generated under this schema will be returned to, and stored in, Order Capture. The first three fields—Components, Connections, and Structure—are available only when you select a configuration type of Compound on the Display page.

**Components** Select *All Components* or *None*.

**Connections** Select *All Connections*, *Filtered List*, or *None*.

**Structure** Select *Include Structure* or *None*.

**Selections** Select *All Selections*, *Filtered List*, or *None*.

**Expressions** Advanced Configurator uses Boolean, date, string, and numeric logic as key parts of its configuration capabilities. Select this check box to return values that are calculated by expressions (in the model) during the configuration session.

**External Variables** Advanced Configurator can retrieve external data for the configuration session at runtime. Select this check box to return external value details during the order capture configuration session.

**Configuration Attributes** Configuration attributes data is normally not essential to the function of the Configurator, and includes data such as a person's name, phone, or email. Select this check box to return configuration attribute data at runtime.

## Display Options

**Display Component Violations** Select to return component violation information at runtime.

**Display Selection Violations** Select to return selection violation information at runtime.

## Package Components

The Package Components grid appears when you select the Package Component check box in the Request the Following section, which is described subsequently. If the product is a package item, then you can select which of the package components and their attributes to include in the request details.

---

# Accessing the Advanced Configurator Solution

This section provides an overview of how to access Advanced Configurator, a sample product configuration, and discusses how to view configuration details.

## Understanding How to Access Advanced Configurator

You can access the Advanced Configurator from:

- PeopleSoft Enterprise Order Capture.

- PeopleSoft Enterprise Order Capture Self Service.
- PeopleSoft Installed Products.
- Product Enterprise Catalog (Product Details).

The following table identifies the Collaborative Selling entry points from which you can access PeopleSoft Advanced Configurator:

Application/Access Point	Page Name	Navigation
Order Capture (RO_CAPTURE)	Entry Form Order (RO_FORM)	Create Order/Create Quote, Entry Form  Add a (configurable) product to the order line, and click the Configurator button.
Order Capture Self Service (RE_CART)	Shopping Cart (RE_CART)	Add a (configurable) product to the shopping cart, and click the Configurator button.
Product Catalog (RB_CATALOG)	Product Details (RB_PROD_DTL)	Access a product catalog, select a product from the Product Display page, and click the Configurator button.

Users can configure their products and product packages by clicking the Configurator button within the calling application. When the product is configured, the configuration is saved to the database. This occurs for both simple and compound configurations. When the configuration session is complete, and order information is updated, the system returns the user to the main calling application.

## Sample Product Configuration

The following example illustrates a configuration session that is initiated from within Order Capture. It shows the custom user interface for a complete sample solution that is supplied with Advanced Configurator.

The screenshot shows a configuration user interface for a refrigerator. The interface is divided into several sections:

- \*What will this freezer be used for?**: Radio buttons for  Food,  Ice, and  Medical.
- \*Refrigerator Type**: Radio buttons for  Cooler and  Freezer.
- \*Refrigerator Dimensions**: Dropdown menus for Height, Width, and Depth, each with the text "Specify a height ...", "Specify a width ...", and "Specify a depth ..." respectively.
- \*Cooling Unit**: Radio buttons for  Cooler w/ Semi-Hermetic Compressor and  Cooler w/ Hermetic Compressor [+ \$4,500.00].
- \*Floor Surface**: Radio buttons for  Concrete Floor,  Epoxy Floor,  Insulated Floor, and  Tile Floor.
- \*Wall Color**: Four color swatches, with the second one (light blue) selected.
- \*Thermostat**: A temperature gauge and a digital display showing 18.8. The display also shows "TAR" and "ELREHA" below the temperature.

The interface includes "Update", "Reset", "Cancel Changes", and "Return to Order" buttons at the top and bottom, and a "List Price: \$8,240.00" indicator.

Example of a configuration user interface

## Viewing Configuration Details

Advanced Configurator enables you to extract information from individual configurations for additional processing and record-keeping. A common use of configuration details is the populating of the line details of an order or quote. When you set up the schema for the solution, you specify whether you want to extract configuration information and which data you want. Advanced Configurator delivers the data in XML form. Because you also specify an XSLT or stylesheet in the schema, the XML formatted data is rendered in a meaningful form.

**Line Details**
Find | View All
First 1 of 1 Last

<b>Product</b> Custom Walk In Freezer	<b>Line</b> 1	<b>Total Price</b> 23460.00	
<b>Product ID</b> 9999	<a href="#">Add Note</a>	<b>Total Recurring Price</b> 00.00	
<b>*Unit of Measure</b> Each		<b>List Price</b> 25,500.00	
<b>Order Qty</b> 1.0000	<a href="#">Availability Check Failed</a>	<b>Discount Taken</b> 2040.00	
<b>Unit Price</b> 0.00	<a href="#">View Adjustments</a>	<b>Discount Percentage</b> 8.00	
<b>Promotion Code</b>		<b>Minimum Price</b> 22,100.00	
<b>Shipment</b> Single Shipment			

**Cross/Up Sell Opportunities**

Product Description	Product ID	Relationship Description
Refrigerator, Plastic Bins	10000	Alternates
Air Cond, Fan	10010	Alternates

**Configuration and Attributes**

<b>Product Brand</b> Arctic King	<b>Category</b> Commercial Room
<b>Model Number</b> RV102	

Custom Walk In Freezer

Example of configuration details used to populate an order

## Setting Up Configured Packages and Products

This section discusses how to set up configured packages and products.

### Page Used to Set Up Configured Packages and Products

Page Name	Object Name	Navigation	Usage
Product Definition	PROD_DEFN	Products CRM, Product Definition, Definition	Set up package or product configuration.

### Setting Up Configured Packages and Products

Access the Product Definition page.

<input type="button" value="Save"/> <input type="button" value="Refresh"/>	
<b>Product</b> Advanced Wireless Package	<b>Product ID</b> TEL200051
<b>Product Type</b> Package	<b>SetID</b> COM01
<a href="#">Definition</a> / <a href="#">External Description</a> / <a href="#">Actions</a> / <a href="#">Attributes</a> / <a href="#">Attachments</a> / <a href="#">Installed Product</a>	
<b>Product Details</b>	
<b>*Name</b> <input type="text" value="Advanced Wireless Package"/>	<b>*Status</b> <input type="text" value="Active"/>
<b>Model Number</b> <input type="text"/>	<b>Brand</b> <input type="text"/>
<b>Catalog Number</b> <input type="text"/>	<b>Category</b> <input type="text" value="WIRELESS"/>
<b>Long Description</b> <input type="text" value="Receive a terrific value from GBI Telekom when you order online. Depending on the calling plan and phone you choose, you can take advantage of mail-in rebates, additional minutes, and more."/>	
<b>Order Standalone By</b>	
<input checked="" type="checkbox"/> <b>Business</b> <input checked="" type="checkbox"/> <b>Consumer</b>	
<b>Pricing</b>	
<b>Price Package</b> <input checked="" type="radio"/> <b>at Top Level</b> <input type="radio"/> <b>at Component Level</b>	
<b>Configuration Information</b>	
<input checked="" type="checkbox"/> <b>Configured</b>	
<b>Schema</b> <input type="text" value="WIRELESS_SERVICE"/>	

Product Definition page

**Configured**

Select to indicate that the package or product is configured.

**Schema**

Advanced Configurator schemas appear in schema search.

## CHAPTER 8

# Integrating with Fulfillment and Billing Systems

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

- Activate integration points.
- Create autonumbering for orders and quotes.
- Map line statuses.
- Publish order and quote messages.
- Subscribe to order status messages.
- Subscribe to order and quote acknowledgements.
- Subscribe to advanced shipping notices (ASNs).
- Manage externally originating orders.
- Integrate with billing systems.

---

## Understanding Fulfillment

This section discusses:

- Integration setup.
- Integration points.
- Activation of integration points for use with PeopleSoft SCM.
- Order maintenance integration points.

### See Also

[Chapter 4, “Setting Up PeopleSoft Order Capture,” Defining Integrations and Mappings, page 65](#)

[Chapter 3, “Defining Order Capture Business Units,” page 15](#)

## Integration Setup

The primary setup of Order Capture integration occurs in the Order Capture Integration Workbench. The Integration Workbench is designed so that all of your fulfillment and maintenance activity can be configured there. There are also a few fields that must be populated on the Business Unit Definition page.

## Integration Points

Order Capture uses integration points to transfer information between itself and an order fulfillment system, such as PeopleSoft Order Management or PeopleSoft Inventory. These integration points enable you to configure your collaborative selling solution to work with any third-party fulfillment system or enterprise application integration (EAI) system.

---

**Note.** Delivered integration points are configured for integration with PeopleSoft Supply Chain Management (SCM), which provides corresponding integration points for example, integration points that publish the information for which PeopleSoft CRM listens. Integration with other fulfillment or EAI systems might require the use of the PeopleTools Integration Broker to build the necessary transformation layer on top of the existing integration points that PeopleSoft delivers.

---

PeopleSoft provides the following integration points to support the order fulfillment process:

Integration Point	Description	Message / Transaction Name	Relationships	Type
Get Autonumber	Requests an ID number (to be used for a new order or quote) from your fulfillment system. This integration point is used only when autonumbering is used for order ID assignment.			Outbound / Synchronous
Get Order Status	Requests current order and order line status from your fulfillment system.	SCM_GET_ORD_STATUS and SCM_ORD_STATUS	ORDER_STATUS	Outbound / Synchronous

Integration Point	Description	Message / Transaction Name	Relationships	Type
Get Product Availability	Requests product availability information from your fulfillment system.  <b>Note.</b> The Get Product Availability integration point gives PeopleSoft CRM users on-demand access to product availability information. Users click the Check Availability button on the order or quote Entry Form page to initiate the transaction.	SCM_GET_PROD_AVAIL and SCM_PROD_AVAIL	None	Outbound / Synchronous
Publish Order	Sends new orders to your fulfillment system.	CRM_SALES_ORDER and SALES_CRM_ORDER_LOAD	ORDER_PUBLISH	Outbound / Asynchronous
Publish Order Change	Sends changed orders to your fulfillment system.	CRM_SALES_ORDER_CHANGE and SALES_CRM_ORDER_CHANGE_LOAD	ORDER_PUBLISH_CH	Outbound / Synchronous
Publish Quote	Sends new quotes to your fulfillment system.	CRM_QUOTE and SALES_CRM_QUOTE_LOAD	ORDER_PUBLISH	Outbound / Asynchronous
Receive ASN	Listens for ASNs published by your fulfillment system.	ADVANCED_SHIPPING_NOTICE	None	Inbound / Asynchronous
Receive Order Acknowledgement	Listens for order acknowledgements published by your fulfillment system.	SALES_ORDER_ACKNOWLEDGEMENT	None	Inbound / Asynchronous

Integration Point	Description	Message / Transaction Name	Relationships	Type
Receive Quote Acknowledgement	Listens for quote acknowledgements published by your fulfillment system.	SALES_QUOTE_NOTICE	None	Inbound / Asynchronous
Receive Order Change Acknowledgement	Listens for order change acknowledgements published by your fulfillment system.	SALES_ORDER_CHANGE_NOTICE	None	Inbound / Asynchronous
Sales Order Status	Listens for order updates published by your fulfillment system.	SALES_ORDER_STATUS	None	Inbound / Asynchronous

**Note.** The integration points listed in the preceding table use PeopleTools Integration Broker messages. Application Message Monitor and Send Master (a PeopleTools testing utility) help you track and test the messages and transformations that make up these integration points. The Get Autonumber integration point is an exception in that it uses PeopleTools Business Interlink technology.

## Activation of Integration Points for Use with PeopleSoft SCM

If you are using PeopleSoft SCM, you need to:

- Activate the product, customer, and business unit integration points.

These integration points synchronize the customer, product, and business unit data in the two systems. This synchronization is required when you use PeopleSoft SCM as your fulfillment system.

- Activate PeopleSoft CRM services, service operations and routings for the PSFT\_EP node.
- Activate the SCM integration points that support the CRM/SCM fulfillment integration.

The SCM integration points for Product Availability and Get Order Status are XML links rather than Integration Broker transactions; the activation process for those integration points is therefore different.

**Note.** If a product uses an inventory item, that item must also be in the CRM (Item Master Table), otherwise the CRM CI Process will fail. Make sure that you sync the item master first before ProductFullSync or ProductSync.

## Order Maintenance Integration Points

When an order is captured in PeopleSoft CRM, it is passed to the fulfillment system for processing. Subsequent changes to the order are sent from and received by the fulfillment system by means of appropriate integration points. The integration points support integrations with PeopleSoft SCM and other third-party fulfillment systems. The Get Order Status integration point is used as part of the Order Maintenance process when an order is retrieved for maintenance. This ensures that PeopleSoft only allows edits on orders and order lines that are not yet fulfilled.

**Note.** Order maintenance messages, such as CRM\_SALES\_ORDER\_CHANGE, always contain RO\_HEADER information, and always publish the RO\_INTEGRATION, RO\_HISTORY, and RO\_CHARGE data for the order. The remainder of the CRM\_SALES\_ORDER\_CHANGE data only contains order information that has been added or changed.

Order maintenance activities require customer service representatives (CSRs) to have accurate information about changed orders. The following table explains the four integration points that form the backbone of Order Capture's order maintenance activities:

Integration Point Name	Object Name	Description	Type
PUBLISH ORDER CHANGE	SALES_CRM_ORDER_CHANGE_LOAD	Notifies PeopleSoft SCM of an order maintenance request. It is a transformation of the CRM_SALES_ORDER_CHANGE message.	Publish
PUBLISH ORDER CHANGE	CRM_SALES_ORDER_CHANGE	Notifies non PeopleSoft fulfillment systems of the order maintenance request.	Publish
SALES ORDER CHANGE ACKNOWLEDGEMENT	SALES_ORDER_CHANGE_NOTICE	Notifies Order Capture when changes are processed in SCM.	Subscribe
SALES ORDER STATUS	SALES_ORDER_STATUS	Notifies Order Capture of the current state of the order in SCM.	Subscribe

Here is a complete list of the SCM integration points to activate for complete fulfillment functionality:

- SALES\_CRM\_ORDER\_LOAD
- SALES\_CRM\_QUOTE\_LOAD
- ADVANCED\_SHIPPING\_NOTICE
- SALES\_ORDER\_ACKNOWLEDGEMENT
- SALES\_QUOTE\_NOTICE
- SALES\_CRM\_ORDER\_CHANGE\_LOAD
- SALES\_ORDER\_CHANGE\_NOTICE
- SALES\_ORDER\_STATUS

---

## Activating Integration Points

This section discusses how to activate Integration Broker integration points.

### Activating Integration Broker Integration Points

Integration Broker integration points are inactive when delivered. You must activate fulfillment integration points. If you are integrating with PeopleSoft SCM, you must activate the Order Management and Inventory integration points listed in the previous section as well. To activate integration points, activate each of the following elements:

- *PeopleTools Application Messages:*

In Release 9, you no longer need to activate messages. Messages are created and viewed through PIA. Navigate to PeopleTools, Integration Broker, Integration Setup, Messages to view the messages.

- *Integration Broker Service Operations and Routings:* Service Operations are accessed through PeopleTools, Integration Broker, Integration Setup, Service Operations. Select the Active checkbox and save the service operation to activate.

Routings can be either accessed from a tab on the Service Operations page, or directly through PeopleTools, Integration Broker, Integration Setup, Routings.

Select the Active checkbox and save to activate a routing.

You need to set the necessary Queues (called Channel in previous releases) to a Run status in order to process integration broker messages. This is accessed through PeopleTools, Integration Broker, Integration Setup, Queues. Fulfillment uses queues CRM\_ORDER\_STATUS, SALES\_ORDER\_LOAD, SALES\_ORDER\_ACKNOWLEDGEMENT and SALES\_ORDER\_STATUS.

---

## Creating Autonumbering for Orders and Quotes

You can choose either the autonumbering or grid option for your orders and quotes. Autonumbers are controlled by business unit. When you set up autonumbering, you choose the business unit that controls autonumber generation and specify whether autonumbers are generated in the PeopleSoft CRM system or in an external fulfillment system.

### Choosing a Business Unit to Control Autonumber Generation

When you define an Order Capture business unit, you map it to an Order Management business unit. You can map multiple Order Capture business units to a single order management business unit. Therefore, to ensure a single source for all numbers that are sent to the order management system, CRM uses the order management business unit to drive autonumbering. For example, if order capture business unit A is mapped to order management business unit B, then when you create an order in business unit A, its number is generated based on the rules for business unit B.

---

**Note.** By design, PeopleSoft SCM cannot use CRM as its autonumbering master for orders and quotes, only for customers, contacts, and products.

---

## Establishing an External ID Source for Orders and Quotes

You can generate order and quote numbers in the CRM system or in your order fulfillment system. If the CRM system does not have an external autonumbering master for orders and quotes, then order numbers are created locally. In this case, be sure that your autonumbering rules include a CRM-specific prefix so that numbers are unique across both your CRM and order fulfillment system. If your fulfillment system is the autonumbering master, the Get Autonumber integration point fetches order numbers from the external system as orders are created. Because order numbers in both systems come from a common autonumbering definition, this configuration ensures that order numbers are unique across both systems.

---

**Note.** The external ID for an order or a quote in Order Capture is used to identify the order or quote in your fulfillment system. The RO\_INTEGRATION table stores the external ID data. This table stores the external ID by source code (for example, SCM), thus allowing for multiple external IDs per CRM order. In addition to storing the external order number, we use this table to store a mapping of sequence numbers on header and line notes.

Notes no longer have sequence numbers in CRM, but SCM requires a sequence number to identify a note, which is why we map the information in RO\_INTEGRATION. In our previous release, EXTERNAL\_ID was simply a field on the RO\_HEADER table.

---

## Mapping Line Statuses

When you send an order to your fulfillment system, that system is responsible for tracking status of the order; CRM integration points bring status information into CRM to display the status of an order.

### Understanding Line Status Mappings

Because different systems can use different order statuses, you must map your fulfillment system's statuses to Order Capture statuses. The Get Order Status integration point reads the map and converts your fulfillment system's statuses into Order Capture statuses. For line statuses, *Partial* means that if a part of one line is backordered and part is shipped, it is in fact, partially shipped.

Header status mappings may differ slightly. PeopleSoft delivers a map for all the Order Management statuses. If you integrate with a different fulfillment system, modify the map accordingly.

---

**Note.** Order Capture maps the status values to node, PSFT\_EP, and if you are using a different node name for your Order Management system, you need to enter status mappings against your node name. The node name is read-only once the data is saved.

---

The following table shows the delivered line status mappings for SCM statuses:

SCM Status	CRM Status	CRM Partial Status
X (Canceled)	1 (Canceled)	1 (Canceled)
Q (Requisitioned)	1000 (Open)	1100 (Partially Open)
U (Purchased)	1000 (Open)	1100 (Partially Open)
B (Backordered)	2000 (Backordered)	2100 (Partially Backordered)

SCM Status	CRM Status	CRM Partial Status
P (Pending)	3000 (Pending)	3100 (Partially Pending)
H (On Hold)	3500 (Fulfillment Hold) <b>Note.</b> Holds that originate in PeopleSoft CRM have the status, 9000. This is to differentiate a hold that originated in PeopleSoft CRM (status 9000), from a hold that originated in SCM.	3500 (Fulfillment Hold)
O (In Fulfillment)	4000 (In Fulfillment)	4100 (Partially In Fulfillment)
K (Picked)	5000 (Picked)	5100 (Partially Picked)
C (Closed)	6000 (Shipped)	6100 (Partially Shipped)
S (Shipped)	6000 (Shipped)	6100 (Partially Shipped)

---

## Publishing Order and Quote Messages

When you capture an order or quote in Order Capture, the system instantiates the `CORE_ORDER_BP` or `CORE_QUOTE_BP` business project. Both of these business projects include a task that runs the `RO_EIP_PUB` Application Engine process, which triggers the Publish Order and Publish Quote integration points. These integration points, which consist of the `CRM_SALES_ORDER` and `CRM_SALES_QUOTE` messages, make order and quote information available to your fulfillment system. PeopleSoft delivers the Integration Broker transformation rules required to integrate with SCM; integration with other systems requires additional transformation rules.

If you use Order Management, integration points receive the transformed messages and enter order data into Order Management staging tables. The orders have a source code of *CRM* and start with a status of *Open*.

---

**Note.** The instantiation of these business projects is determined by the setID. Some setIDs may run business processes.

---

### Running Batch Jobs in Order Management (PeopleSoft SCM customers only)

Subsequent to order submission, the Order Management fulfillment process starts with the `OMEC` process followed by the `OM_BACKGRND` process; `OM_EC` - OM Electronic Commerce is the process that moves data from the staging tables to the order production tables. `OM_BACKGRND` - Order Completion process completes the defaulting of values onto the order. In Order Management, you can set up exclusions to choose which subprocesses within `OMBACK` to run or skip based on the order source code. Because orders that originate in CRM already have tax, freight, and pricing information, you should configure `OMBACK` to skip tax, freight, and pricing calculations for orders with the PeopleSoft CRM source code.

There are four specific SCM processes you need to run to complete the pre-fulfillment tasks. These consist of:

1. Order Validation Process (OM\_EC)
2. Order Completion Process (OMBACK)
3. Outbound Acknowledgement (OMEC Outbound)
4. Data Exchange (Data Publish)

Batch Job	Description	Steps
1: Order Validation (OMEC)	<p>When you submit an order, the transaction is loaded into order staging tables. We first need to run the Electronic Commerce SQR process (OMEC), which:</p> <ul style="list-style-type: none"> <li>• Parses data such as customer information and product information to ensure that it is valid.</li> <li>• Sets system defaults and status flags for subsequent processes.</li> <li>• Loads data into the production order tables (order staging data found to have errors is not loaded into the production tables until the errors have been resolved).</li> </ul>	<p>To run the OMEC batch job:</p> <ol style="list-style-type: none"> <li>1. In the FDM menu, navigate to Order Management, Electronic Commerce, Validate Staged Orders/RFQs.</li> <li>2. Add a new Run Control ID.</li> <li>3. In the Processing Options group box, select the Inbound Order/RFQ Activity check box.</li> </ol> <hr/> <p><b>Note.</b> This will make 2 extra fields (Transaction Type and Integration Point Control ID) available in the Processing Parameters group box.</p> <hr/> <ol style="list-style-type: none"> <li>4. Leave the remaining 3 “queue” check boxes in Processing Options unchecked.</li> <li>5. In the Processing Parameters group box, choose the specific (Order Management) Business Unit you specified on the Order Capture Definition</li> <li>6. Choose the Transaction Type of <i>PO</i> (Inbound Sales Order).</li> <li>7. Leave the Integration Point Control ID field blank.</li> <li>8. Click the RUN button. This tells the system to process our orders that are sitting in the staging tables. You will automatically be taken to the Process Scheduler Request.</li> <li>9. Choose the Server Name, <i>PSNT</i>, and then click <i>OK</i>. You will return to the Electronic Commerce page.</li> <li>10. Click the Process Monitor link and examine the Run Status of your job. You are looking to see the status change from <i>Posting</i> to <i>Success</i>. Click Refresh repeatedly to see if the status has changed.</li> </ol>

Batch Job	Description	Steps
<p>2. Order Completion (OMBACK)</p>	<p>The Order Completion process (OMBACK):</p> <ul style="list-style-type: none"> <li>• Applies the agreement, sold to customer, ship to customer, bill to customer, and order group defaults to the order header and order lines.</li> <li>• Performs order pricing, and does tax defaulting and tax calculations.</li> <li>• Processes estimated shipments and external freight calculations.</li> </ul>	<p>To run the OMBACK batch job:</p> <ol style="list-style-type: none"> <li>1. Navigate to Order Management, Quotes and Orders, Process Orders, Order Completion</li> <li>2. Add a new Run Control ID.</li> <li>3. Select the same Business Unit you chose previously in the From Business Unit field.</li> </ol> <hr/> <p><b>Note.</b> The To Business Unit field automatically populates with the same Business Unit.</p> <hr/> <ol style="list-style-type: none"> <li>4. In the From Order Number and To Order Number fields, select the entire range of your pending orders, and then click <i>Run</i>.</li> </ol> <hr/> <p><b>Note.</b> You will automatically be taken to the Process Scheduler Request.</p> <hr/> <ol style="list-style-type: none"> <li>5. As with the previous job, choose the Server Name, <i>PSNT</i>, then click <i>OK</i>.</li> <li>6. Click the Process Monitor link, and examine the Run Status of your job. You are looking to see the status change from <i>Posting</i> to <i>Success</i>. Click Refresh repeatedly to see if the status has changed.</li> </ol> <hr/> <p><b>Note.</b> You can now view orders in the PeopleSoft SCM system.</p>

Batch Job	Description	Steps
3. Outbound Acknowledgement (OMEC Outbound)	The Outbound Publish process (OMEC Outbound) puts entries in the order acknowledgement queue, which are subsequently used to publish order acknowledgements to PeopleSoft CRM.	<p>To run the OMEC batch job:</p> <ol style="list-style-type: none"> <li>1. In the FDM menu, navigate to Order Management, Electronic Commerce, Validate Staged Orders/RFQs.</li> <li>2. Select the Run Control ID you created when you ran OMEC.</li> <li>3. 3. Uncheck the Inbound Order/RFQ Activity check box, and check the Acknowledgement Queue.</li> <li>4. Click Run, and you will go to the Process Scheduler Request.</li> <li>5. Select the <i>PSNT</i> Server Name, and click <i>OK</i>.</li> <li>6. Click the Process Monitor link on the Electronic Commerce page.</li> <li>7. Examine the Run Status of your job. You are looking to see the status change from <i>Posting</i> to <i>Success</i>. Click Refresh repeatedly to see if the status has changed.</li> </ol>

Batch Job	Description	Steps
4. Data Exchange (Data Publish)	The Data Exchange job is used to publish the Sales Order Acknowledgement message to PeopleSoft CRM, using the information from the order acknowledgement queue.	<p>To run the Data Publish job:</p> <ol style="list-style-type: none"> <li>1. In the FDM menu, navigate to Data Exchanges, Publish Outbound Message.</li> <li>2. Select your existing Run Control ID.</li> <li>3. On the Publish Outbound Message screen, there are a variety of check boxes. Select the Sales Order Acknowledgement check box. The Sales Order Acknowledgement will change to a hyperlink. Click on this link.</li> <li>4. On the Order Acknowledgement Message Selection Criteria page, first choose your Business Unit and then select <i>CRM</i> as the Source Code. Leave everything else blank.</li> </ol> <hr/> <p><b>Note.</b> In the Outbound Messages Selected group box, <i>Order Acknowledgement Queue</i> is pre-selected.</p> <hr/> <ol style="list-style-type: none"> <li>5. Click <i>OK</i>. This takes you back to the Publish Outbound Message page. Click <i>Run</i>.</li> <li>6. Enter <i>PSNT</i> as the Server Name, and click <i>OK</i>. Then click on the Process Monitor link.</li> </ol> <p>If the orders are <i>In Process</i>, this means that you have run the entire cycle of SCM batch jobs successfully.</p>

**Note.** If you navigate to Order Management, Quotes and Orders, Create/Update Order, and choose your business unit, you can search for any order and see that a specific order is *In Process*.

### Understanding the Transformation Process

PeopleSoft delivers transformation rules that you can use when sending information to Order Management. The Application Engine program that performs the transformation has three stages:

1. It evaluates products and packages that were ordered and transforms order lines as follows:
  - a. Service products are not sent at all, but other products are sent exactly as defined in the order line

- b. Product packages are sent as packages, as there is a 1 to 1 mapping of information with Order Management here. However, lightly configured packages are broken into multiple order lines and packages contained in other packages are broken into multiple order lines. Each product included in the package within a package is given its own order line. For example, if Package 1 consists of product A and Package 2, while Package 2 consists of products B and C, then an order line for Package 1 is broken into three order lines: one each for products A, B, and C.

---

**Note.** If you use PeopleSoft SCM and you set pricing at the package level (rather than the component level), no pricing details are sent; each component is sent with a price of zero. Therefore, if you are a SCM customer, pricing for dynamic packages needs to be at the component level.

---

2. It performs an XSL transformation to structure the integration point data for Order Management.
3. It adds SCM customer information (for example, bill to and ship to addresses) to the order data by looking at the tables (RB\_INT\_CUSTOMER and RB\_INT\_CUST\_ADS) that map PeopleSoft CRM customer data to SCM customer data. This mapping is maintained by the Customer Sync integration point.

---

**Note.** If you use PeopleSoft SCM as your fulfillment system, you must keep customer and product data synchronized in the two systems. The Customer Sync and Product Sync integration points manage this synchronization.

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## Understanding the Message Content

This section describes certain parts of the order and quote messages published by CRM. For more details about the messages, refer to the integration point catalog and the message definitions. Order and quote messages published by PeopleSoft CRM include:

- *EXTERNAL\_ID field from the Integration table RO\_INTEGRATION:* This is the ID that maps to the order or quote number in the fulfillment system.
- *Order Management business unit:* This is the business unit that is associated with the Order Capture business unit (on the Order Capture Business Unit Definition page).
- *An order source code of "CRM":* If Order Management is your fulfillment system, this code affects certain processes. For example, Order Management allows CRM orders to be price protected.
- *Order line numbers:* Order Capture expects the fulfillment system to carry the line numbers through the entire fulfillment process. For example, if an order has five lines and lines two, four, and five are sent to Order Management, then the order in Order Management has three order lines numbered 2, 4, and 5. This enables order line tracking even when different order lines are sent to different fulfillment systems.
- *Pricing:* This includes order-level discounts, shipping, and tax information.
- *A price protection setting:* This prevents Order Management from altering price information.
- *Order level discount information..*
- *Giveaway information:* The ORDER\_LINE\_TAG field ties a giveaway to a specific order line.
- *Credit card information:* PeopleSoft stores encrypted credit card data, which is what the message sends.
- *Quote messages:* Quotes include additional information specific to quotes, such as the quote due date and expiration date.

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## Subscribing to Order Status Messages

In PeopleSoft SCM, the Data Exchanges > Publish Outbound Message utility enables you to publish a snapshot of the order as it exists in the SCM system. The Sales Order/Quote Status option enables you to publish orders by business unit, source code (for example, CRM), customer, order type, order number range, order date range, and order change date range. Also, you can choose to publish orders for specific order status values.

Order Capture subscribes to these SALES\_ORDER\_STATUS messages to provide a method for synchronizing changes made to the order in SCM, so that the order reflects the same information. For example, if an order is maintained in SCM, and a new order line is added, the SALES\_ORDER\_STATUS message delivers that order and its new line to Order Capture.

Also, as part of the SALES\_ORDER\_STATUS processing, the current order status is updated, just as the Get Order Status integration point provides.

If the SALES\_ORDER\_STATUS message contains orders that did not originate in Order Capture (for example, EDI orders), then order header information is created so that these orders are viewable through the Order Search screen. When users drill down for further details, they are transferred to the uniform resource locator (URL) specified in the Source Code definition for that order. If no URL is specified, then the user is only able to view the header information for that order.

### Getting On-Demand Status Updates

The Get Order Status integration point provides on-demand status updates. Users invoke the update by clicking the Refresh button on the Order Tracking page.

The Get Order Status integration point updates:

- The status for individual order lines.
- The scheduled shipping date and the scheduled arrival dates.

The integration point also updates the RO\_LINE\_HIST table, which stores a history of line statuses. You can query this history, but it does not appear on any Order Capture pages.

---

## Subscribing to Order and Quote Acknowledgements

In PeopleSoft SCM, the Batch Publish job publishes regular acknowledgments (the SALES\_ORDER\_ACKNOWLEDGEMENT and SALES\_QUOTE\_NOTICE messages) and change acknowledgements (the SALES\_ORDER\_CHANGE\_NOTICE message) for orders that come from electronic commerce channels—that is, for orders that are entered into the SCM staging tables.

---

**Note.** Change acknowledgements are not published for orders that originate within PeopleSoft Order Management.

---

In CRM, the Receive Order Acknowledgement and Receive Quote Acknowledgement integration points subscribe to SCM messages, while the Receive Order Change Acknowledgement integration point subscribes to the change acknowledgement message. When PeopleSoft CRM receives a change acknowledgement, the order status and change history are updated, while rejected order changes are rolled back. When Order Capture receives a regular order acknowledgement, it updates the order header status to In Process, and it sets the order line statuses to the line status map that you established in the Integration Workbench. When an SCM order line status is set to Open, and this is the status that the acknowledgement message sends, Order Capture maps this to a status of In Fulfillment.

Change History was created with a status of *Open* when order changes were initially submitted. When the change acknowledgement is processed, changes that were accepted by the Fulfillment system are marked Confirmed, and changes that are not accepted are marked Rejected. When a requested change is rejected, the original values on the order are restored back to their values prior to the change. For example, if a quantity on an order line was increased from 1 to 2, and that change is rejected because the order line had shipped, the quantity is restored to 1 following the processing of the change acknowledgement.

Change Acknowledgement updates order statuses just as the Get Order Status integration point does, providing a current snapshot of the order status at the time the Change Acknowledgement was published. Order statuses are set based on the status mapping that you establish. The Change Acknowledgement also creates order notifications based upon the setup for the Order Capture business unit.

Notifications may be specified to go to the customer, the CSR, both, or none, based on the acceptance of the changes that were requested. In addition, when notifications are specified for the CSR, the notification is sent based on the CSR's preferred notification setting as found in the Worker component, which can be email, worklist, or both. Notifications to the customer are sent to the email address of the contact listed on the order, or for a consumer order, the consumer's email address. If there is no email specified for the contact or consumer, notifications cannot be sent to the customer. Email notifications show the changes requested, along with the acceptance status of Confirmed or Rejected, and display the order following the Change Acknowledgement processing. A CSR's Worklist notification is a link to the order in the Order Capture Worklist.

---

## Subscribing to ASNs

PeopleSoft Inventory publishes ASNs that provide the number of items that have shipped for a specific order line. These messages do not contain status information about items that have not shipped.

The Receive ASN integration point subscribes to the ASN message.

When PeopleSoft CRM receives an ASN, it updates statuses using the following logic:

1. The shipped quantity from the ASN is added to any previously recorded quantity shipped.
2. If the total shipped quantity is greater than or equal to the quantity ordered, the line and all items in the line have a status of Shipped.
3. If the total shipped quantity is less than the quantity ordered, the system assumes that the items with the highest status were shipped and adjusts statuses accordingly.

Since status numbers increase as an item moves through the fulfillment process, the unshipped item with the highest status is considered the most likely item to have been shipped.

For example, consider the following status update history for an order line consisting of ten items:

Time	Message	Status From Message	Status Displayed in the Status By Quantity Section of the Order
10:00 am	Acknowledgement	10 In Fulfillment	10 In Fulfillment
1:00 pm	ASN	5 Shipped	5 Shipped 5 In Fulfillment
2:00 pm	Order status	10 Partially Shipped	10 Partially Shipped
5:00 pm	ASN	3 Shipped	3 Shipped 7 Partially Shipped
8:00 pm	ASN	2 Shipped	5 Shipped 5 Partially Shipped
10:00 pm	ASN	10 Shipped	10 Shipped

At 10:00 am, the order was submitted. An order acknowledgment message caused the system to set the status of all ten items to *In Fulfillment*.

At 1:00 pm, an ASN message indicated that five items had been shipped. Status changes for these five items and the remaining five items keep the status *In Fulfillment*.

At 2:00 pm, the order status message provided one status for all ten items of that order line, which will be displayed in the Line Details section and the Status By Quantity section of the order in the CRM system.

At 5:00 pm, an ASN message indicated that three more items were shipped. The system updates the Status By Quantity section after the receipt of this ASN message: three items with the status of *Shipped* and seven items with the status of *Partially Shipped*. Note that the update only reflects the change in item shipment gathered in this particular ASN message. Access the Package Tracking section of the order to view the total number of items that have been shipped successfully.

At 8:00 pm, an ASN message indicated that two items have shipped. The order will now show us that five have shipped and five are *Partially Shipped* (even though its true that all have shipped, we don't know that unless we look at the package tracking section).

At 10:00 pm, we receive an Order Status message, and it tells us that ten items have shipped, and now the CRM system shows ten *Shipped*.

---

**Note.** If an ASN is received for any component of a static package, the entire package is considered to have been shipped. When all products on the order have been marked either *Shipped*, *Complete*, or *Cancelled*, the order header status is set to *Complete*.

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## Managing Externally Originating Orders

This section explains how Order Capture handles externally originating orders, and explains how to specify URLs for tracking purposes.

### Handling External Orders

Order Capture uses the Receive Orders integration point to create PeopleSoft CRM records for orders that originate in your fulfillment system (or any other external system). Unlike the Get Order Status integration point, the Receive Orders integration point does not attempt to match the external system's order numbers with Order Capture order numbers. Each Order Capture business unit definition specifies the source code that is used for orders created in the PeopleSoft CRM system. Orders that are entered by the Receive Orders integration point have a source code provided by the external system. Make sure that the source codes are different for orders that originate internally and externally.

---

**Note.** If a user attempts to view an order with a source code other than the one specified in the business unit definition, the system reroutes the user to a page that you specify. If you haven't specified a URL, then you see the header information in order tracking but you can't click on the order for details.

You can specify different target pages to be used when accessing orders in the internal Order Tracking page and the external (self-service) Order Tracking page. The system marks orders that originate outside of CRM, and if you provide the system with the URL for the external system, then a user who attempts to view such an order in the CRM order tracking pages is automatically redirected to the system where the order originated.

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## Integrating with Billing Systems

Order Capture integrates with PeopleSoft Transaction Billing Processor to allow access to standard billing functionality such as revenue recognition structure, billing cycle details, and account rules for applying revenue to the General Ledger. It also allows the enterprise to apply surcharges and taxation to billable amounts and process them through user-defined invoice formats.

### Setting Up an Integration to PeopleSoft Transaction Billing Processor

This integration is detailed in a chapter in the Services Foundation PeopleBook.

#### See Also

*PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook*, "Transaction Billing Processor Integration"

### Using the Transaction Billing Processor Integration from Order Capture

If a contract doesn't exist, the Order Capture transaction triggers a new contract to be created in the Billing system. Pricing is done by the Enterprise Pricer through Order Capture. For agreement products, pricing is also done by the Service Pricing routines. Order Capture sends the total for each order line containing a service or agreement product to the Transaction Billing Processor.

---

**Note.** Transaction Billing Processor integrates with Order Capture and enables you to create invoices and recognize revenue for *service* products. However, Order Capture sends standard products through the integration to Order Management. Order Capture uses Proposal Management to send engagement-type services.

---

Order Capture only sends transactions that are ready to be billed to the Transaction Billing Processor. Order Capture also sends tax parameters, which are used to retrieve the sales and use tax or VAT rate.

**See Also**

*PeopleSoft Enterprise Contracts 9 PeopleBook*



## CHAPTER 9

# Working with PeopleSoft Service Management

This chapter provides overviews of PeopleSoft Service Management, bulk service management, service management integration points and business processes, and discusses how to:

- Manage services.
- Work with bulk service management.

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## Understanding Service Management

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

Service management is used for managing subscriptions. Service management enables users to cancel, change, suspend, or resume a subscription that they previously established with the enterprise.

Service management flows the submitted orders through to the appropriate operations support system applications for provisioning and activation using product actions and product-specific business processes.

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

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

After service is established, several transactions and business processes are required to manage that service.

Attributes are prompted for Change Features however attributes are not required for Disconnect, Suspend and Resume Service actions.

The Maintain Service component supports service actions based on the industry. These actions are implemented through Business Projects or BPEL processes depending on the industry. The setup to determine the implementation is in the Capture Type Workbench. The Maintain Service component uses the following service actions for the communications industry implemented through BPEL processes:

- Change (change the attributes, change phone number, or features of a service)

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**Note.** Physical products should not be ordered by means of the Change action. Physical products may need to go through fulfillment process, which is not built into the Change business process. A physical product such as a handset should be added to the order with the default action New Order. Relate the new handset to the existing Installed Service. In this way the installed product for the new handset will be created under the existing service.

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- Change End Date
- Suspend/Resume Service
- Change Resume Date
- PAC (Port Authorization Code) Request
- Port-In Request
- Activate
- Remove
- New Order
- Suspend/Change
- Disconnect Service
- Suspend Service
- Resume Service
- Cancel Service
- Renew Service

**See Also**

[Appendix A, “Order Capture Delivered Business Processes and Web Services,” page 347](#)

[Chapter 4, “Setting Up PeopleSoft Order Capture,” page 31](#)

[Chapter 12, “Working with Subscription Management,” page 215](#)

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## Understanding Bulk Service Management

Bulk Service Management enables you to capture large numbers of service management orders for a set of installed services. It is achieved by placing one template order and then applying the changes on a set of selected installed services.

Service Management functionality is composed of the following elements:

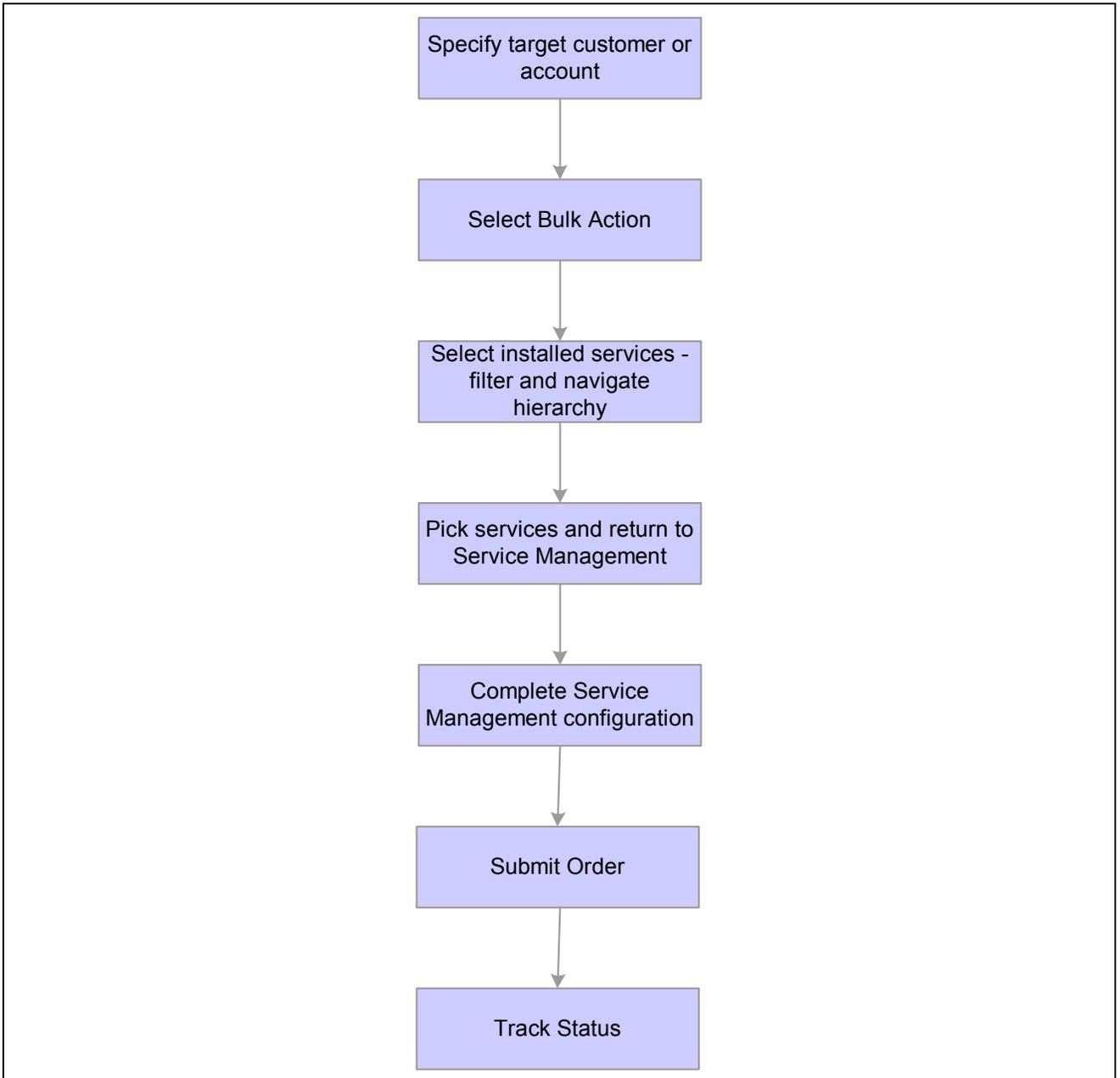
- Bulk Service Management order capture – the online component used for capturing information from the customer.
- Offline process for generating child orders.
- Offline process for submitting child orders.

Bulk service management orders follow these rules:

- You can select only one customer per order.
- You can perform only one action per order.
- For the Change action, you can modify only services of one type.
- Only one installed product, therefore only one service, can be modified per one child modification order.

### Bulk Service Management Process Flow

This diagram illustrates the bulk service management process flow:



Bulk Service Management process flow

### Actions

Bulk service order management actions allow you to either change service status or change the features or attributes of the service.

This table lists the actions available in Bulk Service management:

Action	Description
Disconnect	Status change
Suspend	Status change
Resume	Status change
Renew	Status change
Cancel	Status change
Change	Enables you to modify the service attributes or change features, including adding or removing features. By removing features, the status of the Installed Service is set to 'Disconnected'.

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## Understanding Service Management Integration Points and Business Projects

This section discusses:

- Adding service.
- Changing service.
- Suspending service.
- Resuming service.
- Disconnecting service.
- Renewing service.
- Canceling service.
- Business projects.

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**Note.** This section deals with Service Management integration points and business projects for industries other than communications. For information specific to the communications industry, refer to *Using Order Capture and Service Management in the Communications Industry*.

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See [Chapter 10, “Using Order Capture and Service Management in the Communications Industry,” page 171](#).

### Add Service

When a CSR or customer places an order for a new service, the add service message gets published to the billing system through the TELCO\_NEW\_ORDER business project (phase: Telco Add Services).

Category	Description
Integration Point	Add Service
Request Message	RBT_NEWSRVC_MSG
Message Type	Outbound Asynchronous
Message Called From	Service Management Component
Queue Name	RBT_SERVICEMGMT_CHNL
Configuration Parameter Used	RBTSERVICE

## Change Service

When a CSR or self-service user changes (that is, adds, removes, or replaces) service features of a service in the CRM system, the corresponding change service message gets published to the billing system through the TELCO\_CHGSVC business project (phase: Change Services).

This integration point cannot be used to exchange one service for another, such as wireless for wireline.

Category	Description
Integration Point	Change Service
Request Message	RBT_ADDSRVCFT_MSG (add service feature) RBT_REMOVESRVCFT_MSG (remove service feature)
Message Type	Outbound Asynchronous
Message Called From	Service Management Component
Queue Name	RBT_SERVICEMGMT_CHNL
Configuration Parameter Used	RBTSERVICE

## Suspend Service

Only CSR are able to suspend services. When a CSR suspends a service in the CRM system, the suspend service message gets published to the billing system through the TELCO\_SUSPEND business project (phase: Telco Suspend Service).

Category	Description
Integration Point	Suspend Service
Request Message	RBT_SUSPENDSRVC_MSG
Message Type	Outbound Asynchronous
Message Called From	Service Management Component
Queue Name	RBT_SERVICEMGMT_CHNL
Configuration Parameter Used	RBTSERVICE

## Resume Service

Only CSRs are able to reinstate services. When a CSR resumes a service in the CRM system, the resume service message gets published to the billing system through the TELCO\_RESUME business project (phase: Telco Resume Service).

Category	Description
Integration Point	Resume Service
Request Message	RBT_RESUMESRVC_MSG
Message Type	Outbound Asynchronous
Message Called From	Service Management Component
Queue Name	RBT_SERVICEMGMT_CHNL
Configuration Parameter Used	RBTSERVICE

## Disconnect Service

The customer needs to contact a CSR to terminate services. When a disconnect service request is submitted in the CRM system, the disconnect service message gets published to the billing system through the TELCO\_DISCONN business project (phase: DisSvc Disconnect Services).

Category	Description
Integration Point	Disconnect Service
Request Message	RBT_REMOVESRVC_MSG
Message Type	Outbound Asynchronous
Message Called From	Service Management Component
Queue Name	RBT_SERVICEMGMT_CHNL
Configuration Parameter Used	RBTSERVICE

**Note.** For service management-related integration points, a separate inbound asynchronous message (Message Name: RBT\_IPSTATUS\_MSG; Queue Name: RBT\_NEWACT\_CHNL) is needed and that is used to update the status of service records within the CRM system after status change.

## Renew Service

The customer needs to contact a CSR to renew services. When a renew service request is submitted in the CRM system, the generic service management order message gets published and subsequently transformed into the contract transaction message through the SM\_ORDER\_BP business project. In addition, the SM\_RENEW\_SVC business project runs to perform the updates to the service installed product and service agreements.

Category	Description
Integration Point	Contract Transaction
Request Message	CRM_SERV_MGT_ORDER (generic service management), CONTRACT_TXN (billing transaction processor)
Message Type	Outbound Asynchronous
Message Called From	Service Management Component
Queue Name	CONTRACT

## Business Projects

The table shows business projects associated with service management for industries other than communications:

<b>Business Project</b>	<b>Details</b>
Telco Change Service	This Business Project is instantiated when the Service Type is <i>Change Service</i> .
Telco Suspend Order BP	This Business Project is instantiated when the Service Type is <i>Suspend Service</i> or <i>Suspend/Resume Service</i> .
Telco Resume Order BP	This Business Project is instantiated when the Service Type is <i>Resume Service</i> .
Telco Disconnect Order BP	This Business Project is instantiated when the Service Type is <i>Disconnect Service</i> .
Service Mgmt Cancel Service	<p>This Business Project is instantiated when the Service Type is <i>Cancel Service</i>.</p> <p>Note: The Cancel Service BP is also used to Change End Date of a Temporary Service or to Change the Resume Date for a Service that has a pending Resume scheduled.</p>
Service Management Order BP	This Business Project is instantiated when the service management order is submitted.
Service Mgmt Renew Service	This Business Project is instantiated when the Service Type is <i>Renew Service</i> .

---

## Working with Service Management

This section discusses how to manage services.

## Pages Used to Manage Services

Page Name	Object Name	Navigation	Usage
Manage Service - Entry Form	RO_FORM	<ul style="list-style-type: none"> <li>• Service Management, Maintain Service</li> <li>• Service Management, Start Service</li> <li>• Service Management, Transfer Service</li> <li>• Service Management, Stop Service</li> <li>• Service Management, View Service Management Order</li> </ul>	Manage customer service requests. You can change, suspend, resume, or disconnect services.
Select Installed Services	RO_INSSVC_TREE	Click the Select Installed Services button on the Entry Form page.	Select installed services for the service management order.
Attributes	RO_ATTR_RUN_SEC	Click the Collect Attributes link on the Entry Form page.	Modify the attributes of the selected installed services.
Configure Package	RO_MODIFY_SERV	Click the Configure Package link on the Entry Form page.	Configure the package of the selected installed services.

## Maintaining Service

Access the Manage Service - Entry Form page.

Manage Service - Entry Form page (1 of 2)

Line Details										
Products		Availability								
Line	Line Action	Product Description	Installed Product ID	Options	List Price	Unit Price	Recurring Price	Recurring Frequency	Start Date	
1	Change Features	Wireless Service	INS0250377	Collect Attributes Reconfigure Package	25.00	25.00	30.00	Monthly		
	Add	1000 Anytime Minutes			12.00	12.00	101.00	Monthly		
	Add	1000 Weekend Minutes			13.00	13.00	11.00	Monthly		
	Add	3 Way Calling			1.30	1.30	3.00	Monthly		
	Add	Call Waiting			1.70	1.70	6.00	Monthly		
2	Suspend Service	DSL Service	INS0300001						05/25/2005	
Select Installed Services										
Totals										
Description					Amount	Currency				
One Time Charges					25.00					
Monthly					30.00					
Discount					0.00					
Surcharge					0.00					
<b>Total One Time Charges</b>					<b>25.00</b>	<b>USD</b>				
Update Total										
Submit Save Refresh Cancel 360 360-Degree View Top of Page										

Manage Service - Entry Form page (2 of 2)

The Entry Form for Service Management is similar to the Entry Form for Orders or Quotes.

### Fulfill By

Select a date in the future to queue the order for future processing.

By default this field will be empty. This field is not required on save, but it is required on order submit. If you do not explicitly specify this date before order submission, the order is scheduled for immediate execution.

### Earliest

Calculated by the system this shows the earliest the order can be fulfilled. It is based on the products lead times from the order. If the Earliest Fulfill by is the current date this field is not displayed.

See [Chapter 13, "Managing Orders and Quotes," Creating Orders or Quotes, page 238.](#)

## Suspension of Services

If you select the *Suspend/Resume Service* action, the resume date field is displayed on the Order Line Details page. The service resumption process date is stored with the installed service and is used when validating the new service order against scheduled product suspend/resume.

Depending on the product definition, the system performs these actions to carry out the eventual resumption of suspended service:

- If the product definition indicates *Change Service Status* on a specified date, the suspended service status is automatically changed in the CRM system on that date and no further notification is sent to or expected from the external systems.
- If the product definition indicates *Wait for External System Notification*, the suspended service status is updated only after receiving the confirmation from the external system that the product is resumed.
- If the product definition indicates *Create Disconnect/Resume Order*, a new service resume order is automatically created and submitted by the CRM system to perform product resumption in CRM and other

systems. The date that the resume order is created and submitted is calculated based on service resumption date and resume action lead time for the product.

For temporarily suspended services, the line action *Change Resume Date* enables the modification of the scheduled resume date. The Manage Service business project will be executed to update the CRM system and notify the external systems if necessary.

## Selecting Installed Services

Access the Select Installed Services page.

**Manage Services**  
**Select Installed Services**

**Customer Name** Softgear Inc. **Contact Name** Ted Pepper

**Filter Installed Services List**

**Service**

**Account Name**

**Site Name**

**View By** Account

**Service Phone Number**

[Advanced Search](#)

**Expand All** | **Collapse All** | **Find** | First  1-10 of 10  Last

- Softgear Inc. - COM01 250019
  - Florida Branch - 250023
    - [INS0250361 - Fast Wireless Cable Router](#)
  - Headquarters - 250020
    - [INS0250360 - 256/256 Kbps](#)
  - Midwest Branch Office - 250021
    - [INS0300001 - DSL Service](#)
  - TX Manufacturing Plant - 250022
    - [INS0250362 - Digital Wireless Package](#)
    - [INS0250377 - Wireless Service](#)

**Selected Services** First  1 of 1  Last

Installed Product ID	Product Name	Account
<input type="checkbox"/> INS0250377	Wireless Service	
<input type="checkbox"/> <a href="#">Clear All / Check All</a>		

Select Installed Services page

**Note.** For *Change* actions, the installed service hierarchy is not populated when entering the page. Other action codes that perform a status change, such as *Renew* and *Suspend* do populate the service hierarchy upon entry to the page.

Click Search to present the Installed Services.

### Filter Installed Services List

**Service, Account Name, and Site Name**

Filter the list of installed services using these criteria. If the action is *Change*, you must select a Service.

**View By** Select to define how the list is displayed.

**Advanced Search** Click to display additional search filters: Activation Date and Contact Name.

## Installed Service Tree

Services planned for modification are selected on the installed service hierarchy tree. You can select a whole sub-tree by selecting the checkbox next to a higher-level tree element.

On the hierarchy tree all services that have been added to the Selected Services grid will be grayed out.

## Selected Services



Click the right arrow button to copy the current selection to the Selected Service grid, which will hold the final list of recipient services.



Select installed services on the target list and click the left arrow button to remove these services from the selected services list.

## Clear All/Check All

Click this link to clear all the selections, or select all the services to be transferred to the bulk order.

## Viewing the Line Summary

Access the Entry Form page: Line Summary group box.

Line Summary									
Products									
Line	Line Action	Reason	Product Description	Options	List Price	Unit Price	Recurring Price	Recurring Frequency	Start Date
1	Change	Upgraded	Wireless Service	<a href="#">Collect Attributes</a> <a href="#">Configure Package</a>	0.00	0.00	30.00	Monthly	
2	Suspend	On Vacation	DSL Service		0.00	0.00			07/26/2006

Select Installed Services    Show Add Products

Entry Form page: Line Summary group box

## Products

### Line Action

View all the actions selected by package configuration.

### Options

Click Collect Attributes to access the Attributes page and configure attributes for the product. Click Configure Package to access the Configuration page and change product configuration. Once you have changed the configuration, the icon and text will change to Reconfigure Package.

## Collecting Attributes

Access the Attributes page.

**Attributes for Wireless Service**

**Product Configuration**

**Phone Number** No Changes

**\*Gregs String** Change All

**\*New Gregs String**

**\*Gregs Date** Change Specified Values

**Original Gregs Date**

**New Gregs Date**

**\*Gregs Color** No Changes

**Gregs Number** No Changes

Cancel Save < Back Next >

Attributes page

Once the service is defined and recipient installed services are selected, it is possible to configure attributes. You can define attribute values for all service features, package service features that constitute the modified service in Product Catalogue and have attributes defined.

These options are available for attributes that can be changed:

*Change All:* Modify the attribute regardless of the current value.

*Change Specified Values:* Modify the attribute only if the original value matches the criteria.

*No Changes:* Do not make any changes to the attribute. This is the default value.

## Configuring the Package

Access the Package Configuration page.

### Manage Services

#### Mobile to Mobile Minutes

Select	Existing Feature	Description	One Time Charge	Recurring Charge
<input type="checkbox"/>		500 Mobile to Mobile Minutes	15.0000	3.0000
<input type="checkbox"/>		600 Mobile to Mobile Minutes	16.0000	4.0000
<input type="checkbox"/>		700 Mobile to Mobile Minutes	1.1000	5.0000

#### Add/Remove Features

Select	Existing Feature	Description	One Time Charge	Recurring Charge
<input type="checkbox"/>		Caller ID	1.2000	2.0000
<input type="checkbox"/>		3 Way Calling	1.3000	3.0000
<input type="checkbox"/>		Wireless Web Browser	1.4000	4.0000
<input type="checkbox"/>		Voice Mail	1.6000	5.0000
<input type="checkbox"/>		Call Waiting	1.7000	6.0000
<input type="checkbox"/>		Text Messaging	1.9000	7.0000
<input type="checkbox"/>		Road Side Assistance	2.1000	8.0000

Package Configuration page

When you define modifications on the service configuration for actions, keep in mind that the system does not know what the current configuration of the service is. There is no actual service being modified as the modifications captured will be applied to a set of services, each of which may have been configured in a different way in terms of packages, service features, or attributes.

#### Action

Select an action for each of the service features.

*Do Not Change* ensures that no changes are performed on the package.

*Apply Changes* enables you to specify a target configuration for a package. If the package has *No Downgrade* list specified, the system will not prevent you from selecting the target package configuration. The child orders generation process responsibility will validate the changes and will not create orders violating this rule.

#### Add

The feature will be added to every installed service that does not have one.

If both checkboxes are blank, there will be no changes made.

#### Remove

The feature will be removed from every installed service that has one.

---

## Working with Bulk Service Management

This section provides an overview of bulk service management and discusses how to:

- Configure bulk service management.
- Set attributes for bulk service management.
- Create bulk service management orders.
- Select installed services.
- View line details.
- Collect attributes.
- Configure packages.

### Understanding Bulk Service Management

Bulk Service Management is similar to the user experience utilized by Bulk Order Capture. The Installed Product Tree is used to navigate the billing account, organizational, or service hierarchy to select the services to be changed. Access the Installed Product Tree from Set Up CRM, Product Related, Installed Product, Set Up Tree and use the *BULKSMTREE* tree. Based on filters provided from service management, the Installed Product Tree selects services that are applicable for the requested change. The Service Management component supports the details of the service management action definition, and configuration. Once the service change is configured and specified, Service Management creates child orders for each target service. Each child order is validated by Holds processing and status is available at the bulk as well as at the child level.

## Pages Used to Work With Bulk Service Management

Page Name	Object Name	Navigation	Usage
Setup Workbench	RO_DEFN	Set Up CRM, Product Related, Order Capture, Setup Workbench	Define the actions that are available from Bulk Service Management for the setID.
Bulk Service Management Configuration	RO_BLK_CFG	Set Up CRM, Product Related, Order Capture, Bulk Service Management , Bulk Service Management Configuration	Define actions that change a service's status. Define actions that can be performed only on installed products with a specific status.
Attributes - Order Capture	RB_OBJ_ATTR_GRP	Set Up CRM, Common Definitions, Attributes, Object Type Attributes	Select attributes that can be changed on bulk service management orders.
Manage Bulk Services - Entry Form	RO_FORM	Service Management, Bulk Maintain Services, Manage Bulk Services	Manage bulk service orders.
Select Installed Services	RO_INSSVC_TREE	Click the Select Installed Services button on the Entry Form page.	Select installed services for the bulk service management order.
Attributes	RO_ATTR_RUN_SEC	Click the Collect Attributes link on the Entry Form page.	Modify the attributes of the selected installed services.
Configure Package	RO_MODIFY_SERV	Click the Configure Package link on the Entry Form page.	Configure the package of the selected installed services.

## Configuring Bulk Service Management

Access the Bulk Service Management Configuration page.

### Bulk Service Management Configuration

**SetID**    COM01                    Communications

Select line actions that change service's status  
**Line Actions that Change Service Status**

	*Line Action		
1	Cancel	+	-
2	Disconnect	+	-
3	Renew	+	-
4	Resume	+	-
5	Suspend	+	-

Select actions that require specific statuses on services  
**Line Actions with Status Requirements**

	*Line Action	*Installed Product Status		
1	Change	Activated	+	-
2	Renew	Activated	+	-
3	Suspend	Activated	+	-
4	Suspend	Pending-Activation	+	-
5	Resume	Suspended	+	-

Bulk Service Management Configuration page

## Line Actions that Change Service Status

Line actions that only change the service status, as opposed to a reconfiguration/change of the service, will allow you to select different services from the Bulk Service Management installed service selection tree. For example, if you have DSL service, wireless service and landline phone service on your account, and you wish to disconnect all of these services, you may do this from a single bulk order by choosing the Disconnect action, and selecting these services from the installed service tree. Actions that only act upon a service's status will let you select different types of services on the bulk order. If you wanted to perform a Change action, however, since that does not act upon the service's status, you would be required to select all of the same type of services for the bulk order. The installed service selection tree would require that a service (such as Wireless Service) be selected before the tree is displayed.

## Line Actions with Status Requirements

Actions specified here with their status requirements cause Bulk Service Management to filter the installed services shown in the selection tree to only those services with the selected Installed Product Status values. For example, you may want to ensure that a service's status is *Active* before you allow that service to be *Suspended*.

## Setting Attributes for Bulk Service Management

Access the Attributes - Order Capture page.

**Attributes**  
**Order Capture**

Market: Global

Attribute Groups Find | View All First 1 of 2 Last

Group Market: Global      Group Name: Product Configuration

\*Order: 10      \*Child Object Type: Product

Group Conditions are Defined

**Attributes**

*Order	Use	Display-Only	Required	Allow Change	Name	Label	Begin Date	End Date	Expiration Handling
10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PS_PASSWORD	Password			Read Only
20	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PS_PHONE_NUM	Phone Number			Read Only
30	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PS_USERNAME	User Name			Read Only
40	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	METERTYPE	Meter Type			Read Only
50	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	TELEMETRY	Telemetry Option			Read Only
60	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PS_GREGS1	Gregs String Val			Read Only
70	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PS_GREGS2	Gregs Date Value			Read Only
80	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PS_GREGS3	Gregs Color Choice			Read Only
90	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PS_GREGS4	Gregs Short String			Read Only
100	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PS_AMIT_PHONE_C	Amit Phone Color			Read Only

Re-Sort

Attributes - Order Capture page

**Allow Change**

Select to allow change to specific attributes. If the attribute is not selected, it is not available for change.

**See Also**

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

**Creating a Bulk Services Management Order**

Access the Manage Bulk Services page.



**Manage Bulk Services**  
**Select Installed Services**

**Customer Name** Softgear Inc. **Contact Name** Ted Pepper  
**Action** Renew

▼ **Filter Installed Services List**

**Service**    
**Account Name**    
**Site Name**    
**View By** Account

[Advanced Search](#)

**Expand All** | **Collapse All**    **Find**    First  1-4 of 4  Last

- Softgear Inc. - COM01 250019
  - Midwest Branch Office - 250021
    - [INS0300001 - DSL Service](#)
    - [INS0250377 - Wireless Service](#)

**Selected Services**    First  1-2 of 2  Last

Installed Product ID	Product Name	Account
<input type="checkbox"/> INS0300001	DSL Service	
<input type="checkbox"/> INS0250377	Wireless Service	
<input type="checkbox"/> <a href="#">Clear All / Check All</a>		

Select Installed Services page

**Note.** For *change* actions, the installed service hierarchy is not populated when entering the page. Other action codes that perform a status change, such as *Renew* and *Suspend* do populate the service hierarchy upon entry to the page.

Click Search to present the Installed Services.

## Filter Installed Services List

**Service, Account Name, and Site Name**    Filter the list of installed services using these criteria. If the action is *Change*, you must select a Service.

**View By**    Select to define how the list is displayed.

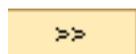
**Advanced Search**    Click to display additional search filters: Activation Date and Contact Name.

## Installed Service Tree

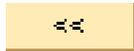
Services planned for modification are selected on the installed service hierarchy tree. You can select a whole sub-tree by selecting the checkbox next to a higher-level tree element.

On the hierarchy tree all services that have been added to the Selected Services grid will be grayed out.

## Selected Services



Click the right arrow button to copy the current selection to the Selected Service grid, which will hold the final list of recipient services.



Select installed services on the target list and click the left arrow button to remove these services from the selected services list.

**Clear All/Check All**

Click this link to clear all the selections, or select all the services to be transferred to the bulk order.

## Viewing Line Details

Access the Entry Form page: Line Details group box.

**Line Details**

Products		Availability					
Line	Line Action	Product Description	Options	List Price	Unit Price	Recurring Price	Recurring Frequency
1	Change Features	<a href="#">Wireless Service</a>	<a href="#">Collect Attributes</a> <a href="#">Reconfigure Package</a>				
	Add	<a href="#">300 Anytime Minutes</a>		11.00	11.00	31.00	Monthly
	Remove	<a href="#">200 Anytime Minutes</a>					
	Remove	<a href="#">1000 Anytime Minutes</a>					
	Add	<a href="#">Caller ID</a>		1.20	1.20	2.00	Monthly
	Add	<a href="#">3 Way Calling</a>		1.30	1.30	3.00	Monthly
	Add	<a href="#">Wireless Web Browser</a>		1.40	1.40	4.00	Monthly

**Child Orders** Customize | Find | View All |

	Installed Product ID	Service	Contact Name	Account	Order ID	Status
1	<a href="#">INS0250377</a>	Wireless Service	Ted Pepper		New	New

[Refresh Child Order List](#)

---

[Top of Page](#)

Entry Form page: Line Details group box

### Products

**Line Action**

View all the actions selected by package configuration.

**Options**

Click Collect Attributes to access the Attributes page and configure attributes for the product. Click Reconfigure Package to access the Configuration page and change product configuration.

**List Price, Unit Price, and Recurring Price**

Bulk Service Management pricing is a sum of child order pricings and will rely completely on their pricing summaries. The total will not be automatically recalculated on modifying child suborder.

### Child Orders

Each Installed Service Product is listed in the Child Orders grid.

**Installed Product ID**

Click to view the installed product information. An installed product ID is created for each child order.

**Service**

The service that is being modified.

<b>Order ID</b>	IDs appear once the orders are generated for these services. If no changes are necessary for the service, an order is not generated, and <i>Not Applicable</i> appears in the Order ID column.
<b>Status</b>	If an order cannot be generated due to an error, the Order ID will not be displayed. Instead a link to a Note with error details will be displayed
<b>Refresh Child Order List</b>	Click this link to update the Child Orders section with the Order ID.
<b>Submit ALL</b>	Generates and submits child orders in one step.  The business project submits the child suborders for the selected installed services. All successfully submitted suborders will have business projects attached to them. For suborders that fail the hold validation, no business project will be created and their status will be set to <i>On Hold</i> and the appropriate hold will be attached to the order.
<b>Generate Orders</b>	After selecting and reviewing the target list of services, create the child orders. Click Generate Orders to launch a business project that will loop through the list of services and will attempt to create a modification order for each. You can still make changes to individual child orders before submission.  Modification to packages featuring <i>No Downgrade</i> will be validated during the child order generation process  The system will try to apply changes specified on the bulk order onto each suborder by adding appropriate order lines: <ul style="list-style-type: none"> <li>• If it is a status change, the system will create a service line for the main service with Line Action set to the value specified on the bulk parent order. It is not necessary to test whether the operation is applicable to this particular service as you will only be able to select those services that are compliant with this operation and are of an appropriate status. For example, you can resume only Suspended services that have a Resume operation defined for them.</li> <li>• If the action is Modify Service Features, Add/Remove Service Features, or Modify Attributes, the system will try to apply the changes as if you were selecting these operations on the regular Service Management order.</li> </ul> When applying the changes the system will perform the following validations: <ul style="list-style-type: none"> <li>• Package maximum and minimum components constraints</li> <li>• No downgrade</li> </ul> If any of the validations fails, the order is not generated.

## Collecting Attributes

Access the Attributes page.

**Attributes for Wireless Service**

**Product Configuration**

**Phone Number** No Changes

**\*Gregs String** Change All

**\*New Gregs String**

**\*Gregs Date** Change Specified Values

**Original Gregs Date**

**New Gregs Date**

**\*Gregs Color** No Changes

**Gregs Number** No Changes

Cancel Save < Back Next >

Attributes page

Once the service is defined and recipient installed services are selected, it is possible to configure attributes. You can define attribute values for all service features, package service features that constitute the modified service in Product Catalogue and have attributes defined. Attributes that are defined as non-modifiable on Bulk Service Management can not be changed.

These options are available for attributes that can be changed:

*Change All:* Modify the attribute regardless of the current value.

*Change Specified Values:* Modify the attribute only if the original value matches the criteria.

*No Changes:* Do not make any changes to the attribute. This is the default value.

---

**Note.** You cannot set values for attributes that are restricted from modification on Bulk Service Management orders.

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## Configuring the Package

Access the Package Configuration page.

### Bulk Service Management

▼ **Any Time Minutes** \* Action

Description	One Time Charge	Recurring Charge	Select 1
200 Anytime Minutes	10.00	21.00	<input type="checkbox"/>
300 Anytime Minutes	11.00	31.00	<input type="checkbox"/>
1000 Anytime Minutes	12.00	101.00	<input type="checkbox"/>

▶ **Weekend Minutes** \* Action

▶ **Mobile to Mobile Minutes** \* Action

**Add/Remove Features**

Description	One Time Charge	Recurring Charge	Add	Remove
Caller ID	1.20	2.00	<input type="checkbox"/>	<input type="checkbox"/>
3 Way Calling	1.30	3.00	<input type="checkbox"/>	<input type="checkbox"/>
Wireless Web Browser	1.40	4.00	<input type="checkbox"/>	<input type="checkbox"/>
Voice Mail	1.60	5.00	<input type="checkbox"/>	<input type="checkbox"/>
Call Waiting	1.70	6.00	<input type="checkbox"/>	<input type="checkbox"/>
Text Messaging	1.90	7.00	<input type="checkbox"/>	<input type="checkbox"/>
Road Side Assistance	2.10	8.00	<input type="checkbox"/>	<input type="checkbox"/>

#### Package Configuration page

When you define modifications on the service configuration for actions, keep in mind that the system does not know what the current configuration of the service is. There is no actual service being modified as the modifications captured will be applied to a set of services, each of which may have been configured in a different way in terms of packages, service features, or attributes.

#### Action

Select an action for each of the service features.

*Do Not Change* ensures that no changes are performed on the package.

*Apply Changes* enables you to specify a target configuration for a package. If the package has *No Downgrade* list specified, the system will not prevent you from selecting the target package configuration. The child orders generation process responsibility will validate the changes and will not create orders violating this rule.

#### Add

The feature will be added to every installed service that does not have one.

**Remove**

If both checkboxes are blank, there will be no changes made.

The feature will be removed from every installed service that has one.



## CHAPTER 10

# Using Order Capture and Service Management in the Communications Industry

This chapter provides an overview and discusses how to:

- Manage 3G wireless services and SIM.
- Manage mobile number portability.
- Manage lost and stolen handsets.
- Order and manage prepaid services.

---

## Understanding Order Capture and Service Management in the Communications Industry

This section discusses:

- 3G wireless services and SIM management.
- Mobile number portability.
- Lost and stolen handsets.
- Prepaid services.

### **3G Wireless Services and SIM Management**

To support 3G wireless services and SIM cards, PeopleSoft CRM enables you to:

- Model and order 3G Service packages comprised of services, USIM and handsets. Also, you can define the relationship between the services, USIM and the handsets.
- Order a new handset to replace an existing handset.
- Use Phone Number Management to support 3G wireless services such as voice, data and fax.

This includes the ability to:

- Support selection of reserved number while ordering
- Capture and track external numbers ported-in.
- Order pre-provisioned Wireless Service where the USIM and the MSISDN(s) are linked prior to sale.
- Order post-provisioned Wireless Service where the USIM and the MSISDN(s) are linked post sale.
- Support business processes required to sell and support 3G Wireless Service, including:

- Ability to search customers by phone number on the 360-degree view, as well as the Account and Installed Products components.
- Ability to capture IMEI number for a handset already owned by the customer.
- Ability to swap handsets.
- Support bulk order 3G services.
- Support future dated orders for 3G services.

See *PeopleSoft Enterprise Number Management 9 PeopleBook*.

## Mobile Number Portability

To support mobile number portability, PeopleSoft CRM enables you to:

- Create an order or quote with a port-in phone number.
- Prevent duplicate port-in requests.
- Cancel an order with port-in.
- Capture data for order lines with a port-in for both US and EMEA.
- Provide a temporary phone number for an order line with a port-in.

## Lost and Stolen Handsets

To support the management of lost and stolen handsets, PeopleSoft CRM enables you to:

- Handle a customer report of a lost or stolen handset and capture lost and stolen handset information.
- Suspend or disconnect the service for a lost or stolen handset.
- Process the replacement handset order with the same service or with a change to the service plan.
- Associate the existing service with a customer owned handset
- Cross sell or up sell a new handset while processing a Lost/Stolen Handset report.
- Reactivate suspended service if the customer finds the handset.

See [Chapter 9, “Working with PeopleSoft Service Management,” page 145](#).

## Prepaid Services

To support the ordering and management of prepaid 3G Services, PeopleSoft CRM enables you to:

- Model and order Prepaid 3G Service packages comprised of services, USIM and handsets.

Also, you can define the relationship between the services, USIM and the handsets. Basically a Prepaid 3G Service is identical and supports the same functionality a normal 3G Services, except the account that is created for the customer is a prepaid account rather than a postpaid account.

- Set up recurring payments or one time payments.

The prepaid account payment options can be changed at any time after the service is ordered by accessing the customer’s account.

- Change the Prepaid Service features. You can *Suspend*, *Resume* or *Disconnect* a Prepaid Service.
- Search customer’s account or service by phone number on the 360-degree view, as well as the Account and Installed Products components.
- Provide support for an unknown prepaid consumer.

- Convert a prepaid service to a normal 3G Service.

See [Appendix A, “Order Capture Delivered Business Processes and Web Services,” page 347](#) and *PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook*, “Understanding Prepaid Accounts for Communication Service Providers”.

## Common Terms Used in this Chapter

These terms are used throughout this chapter:

<b>3G Wireless Networks (Third generation wireless networks)</b>	Third generation wireless networks. An International Telecommunications Union (ITU) specification for cellular communications technology, also called International Mobile Telecommunications-2000 (IMT-2000).
<b>BPEL (Business Process Execution Language)</b>	Controls process flows similar to CRM Business Projects.
<b>EIR (Equipment Identity Register)</b>	A database that stores list of IMEI numbers.
<b>GSM (Global system for mobile communication)</b>	A globally accepted standard for digital cellular communication.
<b>HLR (Home Location Register)</b>	A database that contains semi-permanent mobile subscriber information for a wireless carriers’ entire subscriber base. Stores permanent subscriber data such as service profile, location information and activity status. When an end-user is activated, their permanent data (SIM, IMSI, MSISDN etc.) is entered into the HLR.
<b>IMEI (International Mobile Equipment Identity)</b>	Each GSM mobile phone has a unique identifier. This ID is used to track the phone but not necessarily the subscriber. The IMEI is completely independent of the international mobile subscriber identity (IMSI).
<b>IMSI (International Mobile Subscriber Identity)</b>	The unique identifier for a subscriber. The IMSI is related to the SIM/USIM and is used to uniquely identify a subscriber to the network.
<b>MNP (Mobile Number Portability)</b>	The industry agreed process by which a customer can switch from one network operator to another, within the same country, and take their existing mobile number with them.
<b>MSISDN (Mobile Station International ISDN Number)</b>	Mobile phone number. The MSISDN is the dialable number that callers use to reach a mobile subscriber. Some phones can support multiple MSISDNs, for example, a U.S.-based MSISDN and a Canadian-based MSISDN. Callers dialing either number will reach the subscriber
<b>NPAC (Number Portability Administration Center)</b>	Authority responsible for mobile number porting in the US and Canada.
<b>PAC (Port Authorization Code)</b>	A code used by wireless carriers outside the US to authorize transferring a mobile number from one carrier to another. Its issued by the existing carrier, and required by the new carrier.
<b>Port-In</b>	The term given to the action of signing up for wireless service and using your existing mobile phone number.

**SIM (Subscriber Identity Module) or USIM (Universal Subscriber Identity Module)**

The device that carries the subscriber information for a set of services owned by a subscriber. A SIM card can be inserted into any GSM phone or device (laptop, blackberry, etc.) to enable the services and billing for that subscriber. Service is not available without an active SIM card. Each SIM is assigned a unique number, which is known as the SIM number or ICCID (integrated circuit card identity).

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## Understanding 3G Wireless Services and SIM

This section discusses:

- 3G wireless business processes.
- Holds
- Service Management actions
- Considerations for 3G wireless services

### 3G Wireless Business Processes

The 3G market drives business process requirements in customer service, order capture, order management, and service management.

The primary areas of functionality are:

- Product model

Ability to support a multi-tier hierarchy of services and equipment. Ability to indicate specific services must be ordered through either Postpaid or Prepaid Accounts.

See *PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook*, “Understanding Prepaid Accounts for Communication Service Providers”.

- Number Management

Ability to manage SIM cards, additional number types, and the relationship between service numbers (MSISDN) and SIM card.

See *PeopleSoft Enterprise Number Management 9 PeopleBook*, “Working with Subscriber Identity Modules (SIM)”.

- Order Capture

Ability to support the ordering scenarios for a set of 3G services, a SIM card and a phone.

See [Chapter 10, “Using Order Capture and Service Management in the Communications Industry.”](#) [Managing 3G Wireless Services and SIM, page 185.](#)

- Service Management

Ability to support a n-tier hierarchy between services and equipment

See [Chapter 9, “Working with PeopleSoft Service Management,”](#) page 145.

### Holds

The following holds support orders for the communications industry:

Hold	Description
Phone Number Required	This hold condition ensures that a Service product that requires a Phone Number is assigned a Phone number. This hold cannot be overridden. This is applicable to Order only.
SIM Required	This hold condition ensures that a Service product that requires a SIM is associated to the SIM product.
Ensure Prepaid Order Validation	This hold ensures that the order containing a Prepaid Service is consistent. That means there are no postpaid services on the same order unit and that Prepaid Service is enabled on the business unit.
Ensure Prepaid Product Validation	This hold ensures that the products on the order are consistent with the account type selected.
Prepaid to Postpaid Conversion Order	This hold only fires if order is a conversion order that is converting a Prepaid account to a Postpaid account. The hold ensures there is enough information on the order to perform the conversion.

The following holds support Service Management transactions for the communications industry:

Hold	Description
New Order Check	A new Order Action cannot be combined with Cancel or Disconnect Action.
Phone Number Check	This Hold condition is to check if a Phone numbers is assigned to the Service.
Action Check	This Hold condition will make sure if the selected Action is applicable to the selected Installed Product based on its status. For example, no Actions are allowed on Installed Products with status 'Pending Port-In'.
Prepaid Activation Details Validation	This hold ensures that the Activation Details are completed for the Prepaid Service being activated.

### See Also

Chapter 13, “Managing Orders and Quotes,” Managing Holds, page 265

## Service Management Actions

3G Services, lost or stolen features, and prepaid services support the following new Actions in addition to existing actions like *Suspend*, *Disconnect*, and *Resume*.

Action	Description
Activate	<p>The <i>Activate</i> action allows the selected Installed Services to be activated. The Activate BPEL process is invoked to send message to the provisioning or HLR system to activate the services. Activate Service allows you to assign a service phone number if a phone number is not assigned.</p> <p>With Prepaid Services it ensures that the phone and SIM card were purchased and are ready for activation.</p>
Change	<p>This action allows the user to change the attributes, features, and the phone numbers. A port-in request cannot be entered as part of change number. This action is not applicable for disconnected services.</p>
Suspend and Change	<p>This action suspends the selected installed service and changes the service plan. For example, a customer reports a lost phone handset and requests a change in the plan from 1000 Minutes Anytime to 500 Minutes Anytime. Using this action, the CSR can suspend the existing service and change the plan. The new plan will acquire the status of the parent service.</p> <p>Upon submitting the Service Management order, a BPEL process is triggered, which performs the existing activities of <i>Suspend</i> and <i>Change</i> features along with additional steps pertaining to Lost or Stolen.</p>
Change Number	<p>This action tracks the change to the existing phone number of the selected Installed Service. This action is not applicable for disconnected services. Upon submitting the Service Management Order, a BPEL process is triggered, which sends a message to the provisioning system about the change of the phone number.</p> <p>This action is not user-selectable. The action is automatically assigned when a phone number is changed as part of <i>Change</i> or <i>Suspend and Change</i> action. The <i>Change</i> business process handles the activation of the new number, aging the old phone number, and managing the relationship of the old and the new phone number with the SIM card.</p>

Action	Description
New Order	<p>This action adds a new order from Service Management. This supports ordering of new replacement handset for a lost or stolen handset. . This action results in a new order associated to the current Service Management order. The shipping and billing information is entered on the order by navigating to the new order.</p> <p>This action is not user-selectable. This action is automatically added when replacement products are added to Service Management Order.</p>
Charge	<p>This action is used to track penalties or other charges captured through Service Management. A penalty can be incurred by cancelling a service. A new order will be created for this action.</p> <p>This action is not user-selectable.</p>

### See Also

[Chapter 4, “Setting Up PeopleSoft Order Capture,” Creating Line Actions, page 43](#)

## Considerations for 3G Wireless Services

Points to consider when implementing 3G wireless services:

- Multiple 3G Services can be ordered and price rules can be defined to offer special prices.
- Providers operating in multiple countries must have multiple instances of the databases for Number Management.

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## Understanding Mobile Number Portability

This section discusses:

- Generating a Service Management order to control the port-in.
- Issuing a PAC.
- Canceling an order with a port-in request.
- Porting-out a number.

### Generating a Service Management Order to Control the Port-In

Submitting an order with a port-in request will generate a Service Management order to control the port-in.

The following steps describe the process to control a port-in:

1. Submit new order  
Create a new order containing a port-in request. This order is submitted.
2. Confirm porting details

Because the port-in details entered on the order may not be correct, or may not be sufficient to allow the port-in to occur, the system will confirm the details prior to shipping out a free phone, for example. No Service Management order is created yet. The system sends an EIP out to the donor/third party with the porting details and waits for validation. Once the details are validated, the order is submitted.

3. Create installed products

The installed products and services for this order are created before the Service Management order.

4. Create Service Management order

The Service Management order is created, copying the customer information from the original order, and using the Installed Product created to enter an action of *Port-In Request*.

5. Link Related Actions

When the Service Management order is created, a Related Action link is placed on the original order, to point to the service management order. Additionally, a Related Action link is placed on the Service Management order that points back to the original order.

6. Submit Service Management order

The system submits the new Service Management order, which fires off the BPEL process to control the porting process, as determined by the Action code entered for the Service Management order.

See [Appendix A, “Order Capture Delivered Business Processes and Web Services,” page 347](#).

7. Run BPEL Process

The Service Management BPEL process tracks the port-in through these steps:

- Firm order commitment received
- Port date agreed to by both providers
- Port-in complete

8. Status Updates

After each process, the Service Management order line’s status is updated to reflect the progress of the port-in request. This will aid a CSR in informing the customer of the progress of the port-in. Additionally, the Installed services status is updated to reflect the progress of the port-in. Following the Port-In Complete step, the original order’s port-in line will be updated to *Complete* status. The Installed service also is updated with the Port In date, once it is agreed upon by the 3rd party.

## Issuing a PAC (Port Authorization Code)

A customer who is switching wireless service to a new carrier may require a PAC from their existing carrier to make the switch.

To issue a PAC:

1. Select the wireless phone service in the customer’s installed services.
2. Select the action of *PAC Request* for this installed service. There is no charge for this order.  
The ability to choose a PAC Request action is controlled by the Actions listed on the product definition.
3. You can capture a reason for requesting a PAC to help identify why customers are switching carriers. This is optional.
4. Submit the order.

If there is an outstanding PAC already for this customer's service, issued within the last 30 days, the Service Management order will be put on hold.

5. BPEL is launched.

Order submission launches a business process to issue the PAC, and communicate this code to the necessary third party system. This transaction will not go to Billing.

The BPEL process completes these steps:

- PAC Issued: Provided there is no reason to deny the PAC, the PAC is generated. The PAC is three letters, representing the Carrier, and six digits, which uniquely identify the individual port-out request. The PAC is generated from the Auto Number system. The autonumber type is *PACD*.
- Installed Product Update: The PAC is valid for 30 days and is logged on the installed product along with the PAC expiration date.
- Correspondence: A written confirmation of a PAC is provided to the customer. We provide a template for a PAC notification enabled for the service management order.

See [Appendix A, "Order Capture Delivered Business Processes and Web Services," page 347](#).

## Canceling an Order with a Port-In Request

The system's Port-In Cancellation setting established in the business unit setup, and the order line status determine if the port-in request can be cancelled.

Provided the order is in a cancelable status, such as *In Fulfillment*, the Cancel icon will appear in the order toolbar. The order status is set to *Cancelled*, and all lines that were not complete or shipped are cancelled. The Maintenance business project is launched to determine if any lines contained a port-in request. Since the initial Port-in requests were created as their own Service Management orders, the background process instantiates a *Cancel* action on the Service Management order that was created to perform the port-in. The BPEL process that was launched by the original service management order terminates, and a message is sent to a third party indicating that the Port-In request was cancelled.

If the order contains an inventory item such as a phone that has already been shipped, a cancellation will not affect the shipped items. The business unit setting determines whether you can cancel this order once the order has shipped products.

If the wireless service is already active with a temporary number, a cancellation would typically result in an early termination penalty. Cancellations of this type need to be performed through Service Management so the penalty can be applied.

### See Also

[Appendix A, "Order Capture Delivered Business Processes and Web Services," page 347](#)

## Porting-Out a Number

Once a customer ports-in his phone number to a new carrier, the old service needs to be cancelled. This is a port-out transaction, and is executed automatically based on outside/third party input. The CRM system receives a port-out notification from an external system/third party, which identifies the phone number and customer information that was ported to the new carrier. Upon subscribing to the port-out message, the system creates a Service Management order with an action of *Disconnect* for the service tied to the customer's ported phone number. A Note record containing the information on the message received is added to the Service Management order. The disconnect order is submitted, and the business project which controls disconnects will fire.

The Service Operation for this portout is RBT\_PORTED\_NUMBER.

### See Also

[Chapter 9, “Working with PeopleSoft Service Management,” page 145](#)

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## Understanding Lost and Stolen Handsets

This section discusses:

- Lost and stolen handsets processing
- Business flow
- Duplicate reports
- Handset identity validation
- Handset replacement

### Lost and Stolen Handsets Processing

Service Management provides the ability for Communication Service Provider Agents (CSP Agents) to:

- Create a lost or stolen report from various entry points:
  - 360 Degree View header action.
  - 360 Degree View dynamic grid action.
  - Selecting the *Lost or Stolen* reason from the Service Management order.
- Prevent duplicate lost or stolen reports for the same service and handset combination.
- Initiate service management actions to suspend, suspend/change, disconnect, or resume service and in the same transaction provide the ability to order a replacement handset, accessories, or a SIM.
- Capture important information regarding the lost or stolen handset within Service Management.
- Cross sell or up sell a new handset and accessories when customer does not request a new handset.
- Invoke the Lost and Stolen BPEL that will initiate activities such as blacklisting or whitelisting the IMEI (handset), lead creation, or email correspondence.

### See Also

[Appendix A, “Order Capture Delivered Business Processes and Web Services,” page 347](#)

### Business Flow

If a customer loses a wireless handset, they will report it to the communications provider. The communications provider will then create a Lost/Stolen service management order to capture information about the loss and to track the progress of the process that will follow.

To create a lost and stolen service management order:

1. Identify the customer.
2. Identify the installed service.

3. Enter the line action. Select *Suspend*, *Suspend/Change*, *Disconnect* or *Resume*.
4. Select *Lost or Stolen* as the reason.
5. If the selected action is either *Suspend*, *Suspend/Change* or *Disconnect*, the Collect Lost/Stolen Details link is displayed. Click this link to open the Enter Handset Details page where you can enter all the necessary lost/stolen info. Click OK and save.

Submission of the Service Management order will trigger the processing to suspend or disconnect the service, send a black list message to EIR as well as create a lead or send emails, if appropriate.

6. If the selected action is *Resume*, the Collect Lost/Stolen Details link will not be visible as the system does not collect lost information when resuming a service. Submission of the Service Management order triggers the processing to resume the service and send a white list message to EIR.

See [Appendix A, “Order Capture Delivered Business Processes and Web Services,” Service Management Resume Service Process Flow, page 368.](#)

If the handset has already been reported as lost or stolen, the system displays a message that the loss has been reported and opens the existing service management order.

## Duplicate Reports

If the customer attempts to report a lost or stolen handset that has already been reported, the system generates a message that prevents the user from reporting the handset again.

The user will have either the option to drill into the Service Management Order where the handset has already been reported lost or stolen to provide the customer with the current status of the order. Alternately, they can return to the 360–Degree View.

## Handset Identity Validation

You can make administrative use of the IMEI in the following manner:

- The white list is composed of all number series of equipment identities that are permitted for use.
- The black list contains all equipment identities that belong to equipment that need to be barred.

The BPEL process that controls lost or stolen handsets publishes a message to either blacklist or white list the IMEI. If the IMEI, model number, and manufacturer information is not available, no message will be sent.

See [Appendix A, “Order Capture Delivered Business Processes and Web Services,” Lost or Stolen Handset Process Flow, page 376.](#)

## Handset Replacement

PeopleSoft provides the functionality to handle three scenarios for handset replacement:

- Order handset

The customer requests a replacement handset with the same service.

When the agent selects Order Handset, the Add Products and Services section on the Service Management order is expanded which allows the agent to add a new handset. When the new handset is added to the line action, the agent can now link this handset to an existing wireless service by going to the Line Details page. In the Line Relationship section there is a link called Relate to Customer’s Installed Service. Clicking this link gives the agent a list of installed services that can be linked to the new handset. The agent then select the wireless service.

If a replacement handset is ordered during a lost or stolen Service Management transaction, a new relationship will be established between the replacement handset, new SIM, voice service, and the parent 3G Wireless Service Package.

- Order SIM

The SIM is added to the order in the same way as a handset and is linked to the existing wireless service.

- Customer supplied handset

The customer is going to use another handset they own with the existing wireless service. When the order is submitted, a service management order is created to suspend the service and a new order is created to process the unknown handset.

## Reactivating Service

If the customer finds the missing handset and wants to reactivate the service, the user creates a new Service Management order and selects the action of Resume with the reason, Found Handset. When the Order is submitted, the Resume BPEL process is invoked to whitelist the handset.

See [Appendix A, “Order Capture Delivered Business Processes and Web Services,” page 347](#).

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## Setting Up 3G Wireless Services and SIM

This section discusses how to set up:

- Product definitions
- Product categories
- Product relationships

### Pages Used to Set Up 3G Wireless Services and SIM

Page Name	Object Name	Navigation	Usage
Product Definition	PROD_DEFN	Products CRM, Product Definition	Define 3G products.
Product Category	PROD_CATEGORY	Products CRM, Product Category	Define 3G product categories.
Product Relationships	PROD_RELATIONS	Products CRM, Product Relationships	Define 3G product relationships.

### Setting Up Product Definitions

Access the Product Definition page.

Save Refresh

**Product** 3G Voice Services **Product ID** TEL000013  
**Product Type** Service **SetID** COM01

Definition External Description Actions Attributes Attachments Installed Product

**Product Details**

\*Description 3G Voice Services \*Status Active  
 Model Number Brand  
 Catalog Number Category  
 Long Description 3G Voice Services

**Order Standalone By**

Business  Consumer

**Service Information**

Service Feature  
 Service Required  
 Service ID

**Billing Account Type**

Prepaid Only  
 Postpaid Only  
 Either

**Communication**

SIM Number required  
 Phone Number required  
 Number Type Wireless Number  
 Line Usage Voice Line

Product Definition page

## Communication

### SIM Number required

Select to indicate if a SIM card is required and to associate the SIM with the Service. During the order process the system will check the existence of a SIM product and its association to product(s) that require SIM.

### Phone Number required

Select to indicate if a phone number is required for the service to work. During the order process an overridable hold condition will be defined to check if a phone number is entered for the products/services that require a phone number.

### Number Type

Select *Wireless Number* or *Wireline Number*.

### Line Usage

Select a usage for the service. The valid values for usage are *Voice*, *Fax* or *Data*. The usage information defines the relationship between phone numbers assigned to the SIM based on usages, when the service is added to the order.

Whenever Phone Number Required is selected, the Line Usage value must be captured.

### Billing Account Type

Select the type of billing account that can use this feature. *Prepaid Only*, *Postpaid Only* or *Either*. The billing account type information defines what type of billing account can be created when the product is ordered. Some products can only be serviced through a Prepaid or a Postpaid account.

## See Also

[Chapter 5, “Understanding Product, Pricing, Proration, and Catalogs,” page 79](#)

## Setting Up Product Categories

Access the Product Category page.

Product Category page

The *SIM* category defines and tracks different SIM cards. The 3G USIM product belongs to the SIM category in the Product definition

### See Also

Chapter 5, “Understanding Product, Pricing, Proration, and Catalogs,” page 79

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

## Setting Up Product Relationships

Access the Product Relationships page.

Product Relationships page

This relationship indicates that a 3G USIM is required whenever 3G voice service is added to the order. The 3G USIM will automatically be added to the order, when the service is added to the order. The services are associated to the 3G USIM and the 3G USIM is associated to the parent package service of *Voice, Fax and Data*. The Installed Products created for the 3G services, USIM and handsets reflect these relationships.

A single SIM can support one voice, one fax and one data service. Therefore, if the order contains one quantity each of voice, fax and data service, then there will be one 3G USIM product with quantity as one.

The *Child Of* relationship type is used to define the parent of the product and to define the Service to Service and Product to Service relationships.

**See Also**

Chapter 5, “Understanding Product, Pricing, Proration, and Catalogs,” page 79

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

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## Managing 3G Wireless Services and SIM

This section discusses how to manage 3G wireless services and SIM.

### Pages Used to Manage 3G Wireless Services and SIM

Page Name	Object Name	Navigation	Usage
Search	RO_SEARCH_UPDATE	Orders and Quotes, Search Orders and Quotes	Search orders and quotes by service phone number or account number.
Order	RO_FORM	Orders and Quotes, Add Order	Add or view an order with a SIM.
View SIM Details	RO_LINE_COM_SEC	Click the View SIM Details link on the Order page.	Add or view SIM details.
Order	RO_FORM	Orders and Quotes, Add Order	View or change numbers.

### Using the Search Function

Access the Search page.

Search page

**Service Phone Number** Allows searching Order and Quotes by Service Phone Number.

**Account Number** Allows searching Order and Quotes by Account Number.

**Source** A new value, *Storefront* is available for storefront users. This value implies that the storefront has physical products such as SIM and phones at their disposal to give to the customer with no shipping required.

Selection of this value means there will be no request sent to fulfillment system for shipping.

## Managing SIM Assignments

Access the Order page.

**Order**

[Convert to Quote](#) | [Clone](#) | [Add Order](#) | [Search](#) | [Refresh](#) | [360 360-Degree View](#) | [Personalize](#)

**Order ID** COM0500059      **Order Status** Complete Order  
**Customer** [Prepaid Consumer](#)

[Entry Form](#) | [Line Details](#) | [Holds](#) | [Notes](#) | [Related Actions](#) | [History](#)

Go To

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**Customer**

**Customer** [Prepaid Consumer](#)      **Account**  
**Contact**

▼ **Order Details**

**Business Unit** COM01 - Communications      **Status** Complete  
**Description**  
**Fulfill By** 06/07/2006      **Earliest** 06/07/2006

[Show Details](#)

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**Line Summary**

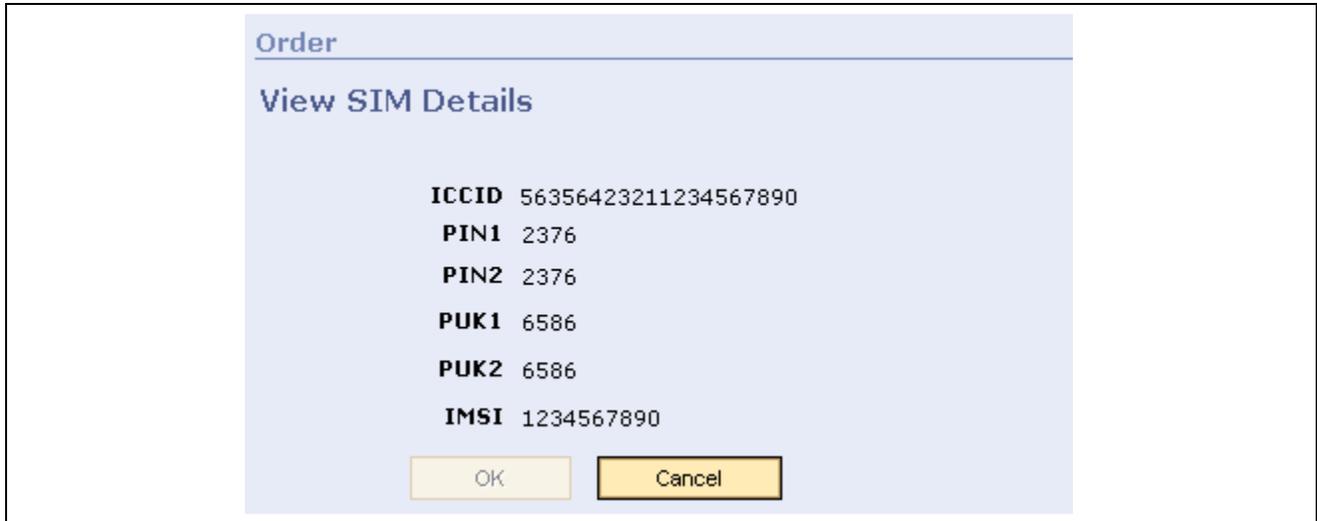
Products		Pricing Adjustments		Availability						
Line	Product Description	Product ID	UOM	Order Quantity	Options	List Price	Unit Price	Recurring Price	Recurring Frequency	Status
1	<a href="#">3G Wireless Prepaid Package</a>	TEL000024	Each	1.0000		2.80	2.80	7.00	Monthly	Complete
	<a href="#">3G Voice Services</a>	TEL000013	Each	1.0000	Port 415/989-0603	0.00	0.00			Complete
	<a href="#">Caller ID</a>	TEL200013	Each	1.0000		1.20	1.20	2.00	Monthly	Complete
	<a href="#">Voice Mail</a>	TEL200016	Each	1.0000		1.60	1.60	5.00	Monthly	Complete
	<a href="#">Nokia 3360</a>	TEL000016	Each	1.0000	<a href="#">View IMEI Details</a>	0.00	0.00			Complete
	<a href="#">3G USIM</a>	TEL000009	Each	1.0000	<a href="#">View SIM Details</a>	0.00	0.00			Complete

Order page

**View SIM Details**      Click to access the View SIM Details page.

## Viewing SIM Details

Access the View SIM Details page.



View SIM Details page

## Selecting Numbers

Access the Order page-Products tab.

Line Summary										
Products		Pricing Adjustments		Availability						
Line	Product Description	Product ID	*UOM	Order Quantity	Options	List Price	Unit Price	Recurring Price	Recurring Frequency	
1	<a href="#">3G Wireless Postpaid Package</a>	TEL000023	Each	1.0000	<a href="#">Reconfigure Package</a>	42.10	42.10	45.00	Monthly	
	<a href="#">3G Voice Services</a>	TEL000013	Each	1.0000	925/794-1036 <a href="#">Change Number</a>	0.00	0.00			
	<a href="#">3G Fax Services</a>	TEL000014	Each	1.0000	925/794-1038 <a href="#">Change Number</a>	0.00	0.00			
	<a href="#">3G Data Services</a>	TEL000015	Each	1.0000	925/794-1039 <a href="#">Change Number</a>	0.00	0.00			
	<a href="#">Any Time Minutes</a>	TEL200002	Each	1.0000		0.00	0.00			
	<a href="#">200 Anytime Minutes</a>	TEL200003	Each	1.0000		10.00	10.00	21.00	Monthly	
	<a href="#">Weekend Minutes</a>	TEL200006	Each	1.0000		0.00	0.00			
	<a href="#">1000 Weekend Minutes</a>	TEL200007	Each	1.0000		13.00	13.00	11.00	Monthly	
	<a href="#">Mobile to Mobile Minutes</a>	TEL200009	Each	1.0000		0.00	0.00			
	<a href="#">500 Mobile to Mobile Minutes</a>	TEL200010	Each	1.0000		15.00	15.00	3.00	Monthly	
	<a href="#">3 Way Calling</a>	TEL200014	Each	1.0000		1.30	1.30	3.00	Monthly	
	<a href="#">Caller ID</a>	TEL200013	Each	1.0000		1.20	1.20	2.00	Monthly	
	<a href="#">Voice Mail</a>	TEL200016	Each	1.0000		1.60	1.60	5.00	Monthly	
	<a href="#">Nokia 3360</a>	TEL000016	Each	1.0000		0.00	0.00			
	<a href="#">3G USIM</a>	TEL000009	Each	1.0000		0.00	0.00			

Order page-Products tab

The phone number is automatically assigned when you select the *Voice*, *Fax* or *Data* services and return to the order. If a phone number is not assigned, the link will show be Assign Number.

- Product Description** An order line may have multiple quantities of products. Similarly, a package component may have multiple quantities. If the selected products require a Phone Number or attributes, there will be multiple lines in the Order with single quantity. This allows capturing of distinct attributes or Phone Number for each product.
- Change Number** The Change Number link is displayed if a phone number is assigned and the order is not submitted. It allows you to change the assigned Phone number.

## Setting Up Mobile Number Portability

This section discusses how to:

- Define a communications business unit.
- Create a service provider list for wireless carriers.

### Page Used to Set Up Mobile Number Portability

Page Name	Object Name	Navigation	Usage
Communications	BUS_UNIT_RBT	Set Up CRM, Business Unit Related, Order Capture Definition, Communications	Define mobile number portability parameters for the communications business unit.  Create a service provider list for wireless carriers.

## Defining the Communications Business Unit

Access the Communications page.

The screenshot shows the 'Communications' page with the following configuration for Mobile Number Portability:

- Business Unit:** COM01
- Description:** Communications
- Mobile Number Portability Section:**
  - Port-In Allowed
  - PAC Required
  - OCN: 1234
  - Network ID: N13244334433
  - \*Temporary Phone Numbers: Optional
  - \*Port In Cancellations: Never allow cancel
  - Default Port-In Days: 1

Communications page-Mobile Number Portability

### Mobile Number Portability

- Port-In Allowed** Control whether the enterprise user will be allowed to enter port-in information for wireless service.
- Temporary Phone Numbers** Temporary numbers can be issued as part of a port-in request. This would not typically be the case for a port-in within the United States, but may be

needed in EMEA, where the port is a lengthier process. Select a value of *Always*, *Never*, or *Optional*.

**PAC Required**

A PAC is required in most EMEA countries, but are not required in the United States.

**Port In Cancellations**

Indicate at which point in the process a cancellation of the port-in order may take place. Your organization may have rules about when to allow a cancellation of a port-in order. Select a value of *Always allow cancel*, *Cancel until products ship*, *Never allow cancel*, or *Until port-in date agreed*.

**OCN (Operating Company Number)**

Enter the operating company number.

**Default Port-In Days**

Enter the number of days to add to the current date to default the Port-In date.

**Network ID (Network service provider identification)**

Enter the network service provider identification (SPID).

**See Also**

[Chapter 3, “Defining Order Capture Business Units,” Defining Order Capture Business Units, page 16](#)

## Creating a Service Provider List for Wireless Carriers

Access the Communications page.

The screenshot shows a web form titled "Wireless Service Provider". At the top right, there are navigation links: "Find | View All" and "First 1 of 3 Last". The form contains the following fields and options:

- \*Provider ID: CINGULAR
- Description: Cingular
- Network ID: (empty)
- \*Status: Active (dropdown menu)
- Contact Name: (empty)
- OCN: (empty)
- Validation Methods Available**
  - Automatic
  - Phone
  - Fax Number
  - Website URL: http://www.cingular.com

Communications page-Wireless Service Provider

**Network ID (Network service provider identification)**

Enter the network service provider identification (SPID).

**OCN (Operating Company Number)**

Enter the operating company number.

## Managing Mobile Number Portability

This section discusses how to:

- Create an order with a port-in request.
- Select phone numbers.

- Provide port-in number details.
- View port-in number details.
- View port-in orders in Service Management.

See [Appendix A, “Order Capture Delivered Business Processes and Web Services,” Mobile Number Portability Process Flow, page 351](#).

## Pages Used to Manage Mobile Number Portability

Page Name	Object Name	Navigation	Usage
Entry Form	RO_FORM	Orders and Quotes, Add Order	Enter an order for a port-in.
Available Phone Numbers	RO_LN_NUM_SRCH_SEC	Click the Change Number link on the Entry Form.	Access the Port-In Details page.
Port-In Details	RO_LINE_PORTIN_SEC	Click the Port-In Mobile Number link on the Available Phone Numbers page.	Enter port-in details.
Manage Service	RO_FORM	Service Management, View Service Management Order	View the Service Management order for the port-in.

## Creating an Order with a Port-In Request

Access the Entry Form page.

**Order**

[Submit](#) [Save](#) [Validate](#) [Convert to Bulk](#) [Add Order](#) [Search](#) [Cancel](#) >>
 
[Personalize](#)

<b>Order ID</b> New <b>Customer</b> <a href="#">Softgear Inc.</a> <b>Contact</b> <a href="#">Ted Pepper</a>	<b>Order Status</b> New Order <b>Customer Value</b> Platinum ★★★★★ <b>Credit Rating</b> 0
---	---

Entry Form
Line Details
Holds
Notes
Related Actions
History

Go To

**Customer**

<b>Customer</b> <a href="#">Softgear Inc.</a> <b>Contact</b> <input style="width: 150px;" type="text" value="Ted Pepper"/>	<b>Account</b> 100250105
---	--------------------------

[Search Again](#)

**Order Details**

**Line Summary**

Line	Products	Pricing Adjustments	Availability	Order Quantity	Options	List Price	Unit Price	Recurring Price	Recurring Frequency
1	<a href="#">3G Wireless Postpaid Package</a>	TEL000023	Each	1.0000	<a href="#">Reconfigure Package</a>	42.10	42.10	45.00	Monthly
	<a href="#">3G Voice Services</a>	TEL000013	Each	1.0000	925/794-1020 <a href="#">Change Number</a>	0.00	0.00		
	<a href="#">Any Time Minutes</a>	TEL200002	Each	1.0000		0.00	0.00		
	<a href="#">200 Anytime Minutes</a>	TEL200003	Each	1.0000		10.00	10.00	21.00	Monthly
	<a href="#">Weekend Minutes</a>	TEL200006	Each	1.0000		0.00	0.00		

Entry Form page

### Change Number

Click this link to access the Available Phone Numbers page.

### Submit

When you submit the order, the system validates the port-in details and confirms that the phone number(s) being ported in has not already been logged in the Number Management database. A port-in request for a phone number cannot include a phone number that is already in the database, unless the number is in *Ported-Out* or *Released* status. The order will go on Hold if the data is invalid. If the data is valid, the order is fulfilled and a service management order is created which initiates the port-in actions to get the number ported to the new carrier. The customer gets an email correspondence of the order details.

## Selecting Phone Numbers

Access the Available Phone Numbers page.

**Order Capture**

**Available Phone Numbers**

▼ **Search Results**  
No search results were found.

**Next 5 Numbers**      **Current Number** 925/794-1020      [Port-In Mobile Number](#)

▼ **Search**

**Search**   **Clear**

<b>Region</b>	=	South Bay
<b>Area Code</b>	begins with	
<b>Subscriber Number</b>	begins with	
<b>Category</b>	=	General
<b>Sub Category</b>	=	
<b>Usage</b>	=	Voice
<b>Zip Code</b>	=	94588
<b>Type</b>	=	Wireless Number

**Search**   **Clear**

Available Phone Numbers page

**Port-In Mobile Number**      Click this link to access the Port-In Details page.

## Providing Port-In Number Details

Access the Port-In Details page.

Port-In Details page

**Note.** The PAC field is displayed above the Wireless Service Provider if the PAC Required field is selected for the business unit.

<b>Area Code and Subscriber Number</b>	Enter the area code and the phone number to be ported-in. The system validates the phone number against the Number Management system to confirm that this phone number is valid for porting, that is, it is not already assigned in the database. If the number is found in the number management database, the status must be <i>Ported Out</i> or <i>Released</i> , otherwise the number will be rejected.
<b>Wireless Service Provider</b>	Select from the list populated from the Wireless Carriers by Business Unit data. The list is filtered by <i>Active</i> status.
<b>External Website</b>	Click this link to access the website for the wireless service provider.  This field is only displayed if the business unit setting for the selected wireless service provider has a website URL listed, otherwise this field is hidden. The URL displayed will open in a new window, and could be used to allow for a method to validate the port-in details using the old service provider's website.
<b>Validation Methods Available</b>	This field is controlled by the wireless service provider setup. If the provider setup page indicates that only <i>Automatic</i> validation is allowed, this field is read-only and will show Automatic validation. If the provider is not using Automatic validation, but instead allows either phone, fax or website, the field is displayed and required, and you must select the validation method used.
<b>Contact Phone</b>	Enter a valid phone number for the customer.



## Managing Lost and Stolen Handsets

This section discusses how to:

- Report a lost or stolen handset.
- Enter lost or stolen details.

### Pages Used to Manage Lost and Stolen Handsets

Page Name	Object Name	Navigation	Usage
Manage Service	RO_FORM	On the 360-degree view, select <i>Report a Lost or Stolen Handset</i> in the Action dropdown list.	Disconnect, suspend, suspend/change, or resume service for a lost or stolen handset.
Enter Handset Details	RBT_LOST_STOLEN	Click the Collect Lost/Stolen Details link on the Manage Service page.	Enter information regarding the lost or stolen handset, lost/stolen report, and whether or not customer is ordering a new handset, SIM, or using another customer owned handset for the existing service.

### Reporting a Lost or Stolen Handset

Access the Manage Service page.

**Manage Service** History

Submit Save Refresh Cancel 360 360-Degree View Personalize

Order ID New Order Status New  
 Customer [Softgear Inc.](#) Customer Value Platinum ★★★★★  
 Contact Credit Rating

Entry Form Line Details Holds Notes Related Actions History  
 Go To

**Customer**

Customer [Softgear Inc.](#) Contact

[Search Again](#)

Header Details

**Line Summary**

**Products**

Line	Line Action	Reason	Product Description	Options	List Price	Unit Price	End Date	
1	<input type="text" value="Disconnect"/>	<input type="text" value="Lost or Stolen"/>	<a href="#">3G Wireless Service</a>	<a href="#">Collect Lost/Stolen Details</a>	0.00	0.00	06/02/2006	
			<a href="#">3G USIM</a>		0.00	0.00		
			<a href="#">3G Voice Services</a>	408/123-4567	0.00	0.00		
			<a href="#">200 Anytime Minutes</a>		0.00	0.00		
			<a href="#">Caller ID</a>		0.00	0.00		
			<a href="#">Voice Mail</a>		0.00	0.00		
			<a href="#">Nokia 3360</a>		0.00	0.00		

Select Installed Services Show Add Products Display Open Orders for Selected Services

Manage Service page

- Line Action** Select *Disconnect* or *Suspend* to initiate the Lost or Stolen process.
- Reason** Select *Lost or Stolen*. Click the Collect Lost/Stolen Details link to enter details about the handset.
- Collect Lost/Stolen Details** The Collect Lost Details link will only be displayed if the action is *Suspend*, *Suspend/Change*, or *Disconnect*, and the reason is *Lost or Stolen*.

## Enter Lost and Stolen Details

Access the Enter Handset Details page.

**Maintain Service**

**Enter Handset Details**

**Product Information**

**Service Phone Number** 4081234567

**Product Description** Nokia 3360

**Manufacturer**

**Model** 3360I

**IMEI** 203471725589804242

**Status** Installed

**Lost or Stolen Information**

**\*Loss Date/Time**

**\*Location of Loss**

**Police Report Number**

**Report Date/Time** 06/02/2006  12:55PM

**Comments**

**Block Handset**

**Order Information**

**Order Handset**

**Order SIM**

**Customer Supplied Handset**

Enter Handset Details page

<b>Service Phone Number</b>	Installed Product Voice Service number. The Service Phone Number will only display a phone number for the voice service.
<b>Product Description</b>	The Product Description from the Installed Product. Defaults from the Installed Product, if available. If not available, the field is blank.
<b>Manufacturer</b>	The Manufacturer from the Installed Product. Defaults from the Installed Product, if available. If not available, the field is blank.
<b>Model</b>	The model number from the Installed Product. Defaults from the Installed Product, if available. If not available, the field is blank.
<b>IMEI(International Mobile Equipment Identity)</b>	The IMEI is a unique identifier used to track the handset. Defaults from the Installed Product if available, otherwise the field is blank. The IMEI number will always be 15 characters in length.

<b>Status</b>	The Installed Product Status. Defaults from the Installed Product if the handset is installed. If the handset is not installed then this field will be blank.
<b>Date/Time of Loss</b>	Informational fields to report the date and time that the customer first noticed that the handset was lost or stolen. Fields displayed side by side. Select the date from calendar and enter the time in the entry field.
<b>Location of Loss</b>	Informational field. Enter the location where the customer first noticed that the handset was lost or stolen.
<b>Police Report Number</b>	Informational field. Enter the Police Report number if the customer reported a stolen handset.
<b>Police Report Date/Time</b>	Informational fields if the customer reported a stolen handset. Select date from calendar and enter the time in the entry field.
<b>Comments</b>	Information field. Enter up to 256 characters of additional information regarding the lost or stolen handset.
<b>Block Handset</b>	Defaults to selected. If selected, then Manufacturer, Model, and IMEI will be sent to the EIR. The EIR requires this information to blacklist or whitelist a handset.
<b>Order Handset</b>	Defaults to cleared. Select if customer wants to order a replacement handset.  If Order Handset is selected, the Add Products and Services section on the Service Management Order will be expanded so that a new handset can be ordered.
<b>Order SIM</b>	Defaults to cleared. Select if customer wants to order a SIM.  If Order SIM is selected, the Add Products and Services section on the Service Management Order will be expanded so that a new SIM can be ordered.
<b>Customer Supplied Handset</b>	Defaults to cleared. Select if customer is going to use another handset they own with the existing wireless service. If selected, a dynamic group box called Customer Supplied Handset Information will be displayed.

These fields appear if Customer Supplied Handset is selected.

<b>Manufacturer</b>	The Manufacturer from the Installed Product. The same list of values will be displayed here as the Installed Product Manufacturer field.
<b>Model</b>	The model number of the customer owned handset.
<b>IMEI</b>	The IMEI of the customer owned handset. The IMEI number will always be 15 characters in length.

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## Managing Prepaid Services

For complete details on managing prepaid services, refer to the following documentation.

See *PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook*, “Understanding Prepaid Accounts for Communication Service Providers”; *PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook*, “Setting Up Prepaid Account Management” and *PeopleSoft Enterprise Bill*

*Presentment and Account Management 9 PeopleBook*, “Managing Accounts and Viewing Bills in the Communications and Energy Industries”.

# CHAPTER 11

## Working with Future Dated Orders and Temporary Services

This chapter provides overviews of future dated orders and temporary services and discusses how to:

- Set up future dated orders and temporary services.
- Create future dated orders.
- Modify future dated orders.

---

**Note.** Future dating applies to orders for both products and services.

---

### Understanding Future Dated Orders

Future order functionality enables a user to place an order or a service management request that will occur in the future. The future dated orders are queued in the CRM system and automatically resubmitted to fulfill the order or request. This approach improves performance by not submitting orders until they are due. The functionality of order queuing is configurable through the (business unit)/(order capture definition) framework. It is possible to activate/deactivate the queuing functionality.

Order queuing functionality depends on the order scheduled fulfillment date. An order will be either qualified for immediate execution, that is, the business project will be initiated immediately or will be scheduled for execution in the future. After submitting the order with future scheduled fulfillment date, the system will validate the order and change order status to *Queued*. The business project will not be instantiated; instead the order execution date will be calculated based on the order scheduled fulfillment date and the ordered product's lead time. A separate process will run daily to find and submit all outstanding orders scheduled to be executed on current date. One scheduled fulfillment date will be allowed per order.

### Future Dated Order Terminology

The following terms are applicable to future dated orders:

Term	Definition
Future Dated Order	A customer order or service modification request that will be effective on specified date in the future.
Scheduled Fulfillment Date	The date when future dated order should come into effect. Also known as the Fulfill By date field.

Term	Definition
Earliest Fulfillment Date	The earliest date when the order can be fulfilled. This is calculated based on the ordered product's lead time. The Scheduled Fulfillment Date must not be before the Earliest Fulfillment Date otherwise the order is placed on hold and may be late.
Queued Order	A submitted and validated future dated order, put in the queue for automatic execution on future date.
Order Execution Date	The date when a future dated order should be executed to assure that all requested modifications will be effective on the scheduled fulfillment date. This date will be calculated based on Scheduled Fulfillment Date and maximum lead time for a products added to the order (i.e. Order Execution Date = Scheduled Fulfillment Date – Maximum Lead Time for products that are added to the order).
Order Execution Time Frame	The period of time between order execution date and order scheduled fulfillment date. On order execution date the business project will be initiated and is assumed to be running until order scheduled fulfillment date.
Suspended Service	An installed product that is suspended with a date specifying when the product will be automatically reactivated.  See link to service management chapter

## Understanding Temporary Services

An installed service that has an end date on the order line details page is considered a temporary service. The service end date is stored along with the installed service and is used to validate a new service management order against scheduled product deactivation.

Depending on the product definition, the system performs these actions to carry out the eventual disconnection of the temporary service:

- If the product definition indicates *Change Service Status* on a specified date, the installed product status is automatically changed in the CRM system by a background process on that date. No further notification is sent to or expected from the external systems.
- If the product definition indicates *Wait for External System Notification*, the installed service status is updated only after receiving confirmation from the external system that the requested product deactivation is fulfilled. If the notification is not received after the scheduled termination date is reached, it is considered an error.
- If the product definition indicates *Create Disconnect/Resume Order*, a new service disconnection order is automatically created and submitted by the CRM system to perform product disconnection in CRM and other systems. The date when the disconnection order is created and submitted is calculated based on service disconnection date and disconnect action lead time for a product.

---

**Note.** Depending on the available actions for the service, either a Disconnect action or a Cancel action is used to change the service status or create a disconnect/resume order.

---

For temporarily activated services, the line action *Change End Date* enables the modification of the scheduled end date. The Manage Service business project is executed to update the CRM system and notify the external systems if necessary.

---

## Setting Up Future Dated Orders and Temporary Services

This section discusses how to:

- Configure the Order Capture business unit for order queuing and temporary services.
- Define lead time for products.
- Define lead time for product actions.
- Enable temporary services.

---

**Note.** This section discusses only those fields which are impacted by future dated order functionality. Refer to the following chapters for detailed information on all fields found on these pages.

---

### Pages Used to Set Up Future Dated Orders and Temporary Services

Page Name	Object Name	Navigation	Usage
Order Capture Definition: Internal	BUS_UNIT_RO1	Setup CRM, Business Unit Related, Order Capture Definition Select the Internal tab.	Specify whether to support future dated orders and service management requests.
Definition	PROD_DEFN	Products CRM, Product Definition, Definition	Define the lead time necessary to fulfill the order for a product.
Actions	RBT_PKG_ACTION	Products CRM, Product Definition, Actions	Define the lead time necessary to fulfill the action on the product.
Installed Product	PROD_INSTALL	Products CRM, Product Definition, Installed Product	Enable temporary installation of a product and define how the system will perform possible future deactivation of the installed product.

### Configuring the Order Capture Business Unit for Order Queuing and Temporary Services

Access the Order Capture Definition: Internal page and scroll to the Order Submission section.

To enable the business unit to accept future dated orders, select the Allow Future Dated Orders check box. Also select the Use Lead Time for Start Date to automatically calculate the default for the start date from the product lead time and the scheduled fulfillment date on the order and select a queuing option from the Business Projects list.

To enable the business unit to accept orders for temporary services, select the Allow Temporary Services check box.

See link to defining order capture business units chapter

## Defining Lead Time for Products

Access the Product Definition page.

### Lead Time

The lead time for a product is specified in days. The lead time specified should be the amount of time needed to fulfill the product order. The field defaults to 0 and indicates that the external system can perform the order with no delay. The lead time is taken into account when calculating the order execution date.

If the lead time is updated there is no automatic update to the already submitted orders.

See link to defining products

## Defining Lead Time for Product Actions

Access the Product Definition page: Actions tab.

Save		Refresh	
Product Email		Product ID TEL200024	
Product Type Service		SetID COM01	
Definition		External Description	
Actions		Attributes	
Attachments		Installed Product	
<b>Actions</b>			
Enable	Action Name	Lead Time	
<input checked="" type="checkbox"/>	ADD	3	
<input checked="" type="checkbox"/>	REMOVE	1	
<input type="checkbox"/>	CHANGE ATTRIBUTE		
<input type="checkbox"/>	Change End Date		
<input type="checkbox"/>	Suspend / Resume Service		
<input type="checkbox"/>	Change Resume Date		
<input type="checkbox"/>	CHANGE FEATURES		
<input type="checkbox"/>	DISCONNECT SERVICE	1	
<input type="checkbox"/>	SUSPEND SERVICE		
<input type="checkbox"/>	RESUME SERVICE	3	
<input type="checkbox"/>	LOOP TEST		
<input type="checkbox"/>	Cancel Service		
<input type="checkbox"/>	Renew Service		

Product Definition page: Actions tab

## Lead Time

The lead time for each action is specified in days. The lead time is taken into account when calculating the order execution date. You can define a different lead time for each action associated with the product. The lead time specified should be the amount of time needed to perform the action on the external system for the product. The field defaults to 0 and indicates that the external system can perform the change with no reasonable delay.

If no lead time is explicitly defined for an action, 0 days are assumed. Lead time is ignored for Change End Date and Change Resume Date.

If the lead time is updated there is no automatic update to already submitted orders.

## Enabling Temporary Services

Access the Product Definition page: Installed Product tab.

The screenshot displays the 'Installed Product' configuration page. At the top, there are 'Save' and 'Refresh' buttons. The product information includes 'Product Email Service' with 'Product ID TEL200024' and 'SetID COM01'. The navigation tabs are 'Definition', 'External Description', 'Actions', 'Attributes', 'Attachments', and 'Installed Product' (which is selected). The 'Installed Product Options' section includes a checked checkbox for 'Track as Installed Product'. Below this, the 'Product Installation Settings' section has three unchecked checkboxes: 'Service Order Required', 'Site Required', and 'Un-Install Service Order'. Each of these has a corresponding text input field for service IDs. The 'Order Capture' section has an unchecked checkbox for 'Create Installed Product' and a dropdown menu for 'Initial Status'. The 'Temporary Services' section has a checked checkbox for 'Allow Temporary Services' and a dropdown menu for 'External System' set to 'Create Order for Change'.

Product Definition page: Installed Product tab

### Allow Temporary Services

Enables you to create a temporary service activation order. When this field is selected you can specify a future deactivation date when creating the new installed product.

### External System

Select a value to designate how an external system will handle an automatic service disconnection or resumption when either a temporary service has come to its termination date, or when a service that is suspended with the Suspend/Resume action comes to its resumption date. When the temporary service is at its termination point, this information determines how CRM should handle the disconnect (or cancellation) of the temporary service. When the service reaches its resumption date, this information determines how the system should handle the resumption for the service. Options for the automatic disconnection (or cancellation) of the temporary product or automatic resumption of a service are:

- *Change Service Status*

CRM automatically updates the product status on the specified date. No additional workflow is initiated within CRM nor notification from the external system expected. This option assumes the external system does not need additional notification and the information it received on the initial order is enough for the external system to respond accordingly.

- *Wait for External System Notification*

CRM stores the information on the requested date for the installed product for validation purposes, but it does not update the installed product status until the confirmation from the external system is received. This option assumes the external system is driving the automatically expected change and will notify the CRM system on the specified date.

- *Create Disconnect/Resume Order*

On the specified date a new Service Management order is automatically generated and executed by the system to either terminate or resume the service. This assumes the CRM system is driving and the external system needs to be notified of the expected change.

---

## Creating Future Dated Orders

This section provides an overview of future dated orders and discusses how to create future dated orders.

**Note.** This section discusses only those fields which are impacted by future dated order functionality. Refer to the following chapters for detailed information on all fields found on these pages.

See [Chapter 13, “Managing Orders and Quotes,” page 227](#); [Chapter 9, “Working with PeopleSoft Service Management,” page 145](#) and [Chapter 14, “Working with Bulk Orders,” page 279](#).

## Understanding Future Dated Order Creation

This section discusses:

- Future dated orders.
- Future dated service management orders.
- Multiple future orders for the same service.
- Future dated orders for a temporary suspension.
- Future dated bulk orders.
- Future dated bulk service management orders.

### Future Dated Orders

Future dated order functionality allows you to create orders for service activation or product fulfillment in the future.

The Fulfill By date field triggers the future dating functionality. On order submit, the order execution date (date when the business project needs to be instantiated) will be calculated based on order scheduled fulfillment date and maximum lead time for products that are affected within the order.

- If the order execution date is in the past, the order will be put on hold. The CSR will be able to override the hold and submit the order taking into consideration the fact that order might be overdue.
- If the order execution date is the current date, the order will be submitted immediately.
- If the order execution date is in the future, the order status will be changed to *Queued* after successful validation, and the order will be scheduled for future execution.

The order will only be submitted if no holds are generated. Once an order is submitted it is queued for fulfillment/activation. At a later date, based on the time to deliver the product/service and the future date specified:

- The order configuration will be re-validated.
- The hold validation will be rerun.
- Correspondence will be generated as part of processing the business project to complete the order.
- The order will be processed for fulfillment or activation.

Only one order scheduled fulfillment date is allowed per order. The order line start dates are populated based on the order scheduled fulfillment date (or earliest fulfillment date if scheduled fulfillment date is not set) and are editable based on the Order Capture Business Unit settings for *Line Dates Editable on Order*. The shipment arrival date is editable, but on order submit the validation is performed to ensure that shipment arrival date is later than order scheduled fulfillment date. If the validation fails the order will be put on hold.

You can select a future dated shipment/billing/site address on the Address Book page. The link Advanced Options displays all customer address based on an effective date when the addresses are valid. The Address(es) effective as of date defaults to the Fulfill By date specified on the order. On order submit, the address effective date is validated against the order scheduled fulfillment date to assure there is no mismatch. If the validation fails, the order is put on hold. Possible holds are:

- Fulfill By date is before earliest fulfill by date.
- Future dated orders not enabled.
- Order revalidation after being queued.
- Shipment arrival date earlier than fulfill by date.

A process will be run daily to submit outstanding future dated orders scheduled for the current date. If the order execution date is current or earlier than the current date the order is submitted. The validation will be repeated to ensure the order is still valid. If the validation fails, the order will be put on hold. Otherwise the order status will be changed from *Queued* to *Submitted* and the business project initiates.

The process that is run daily is the Scheduled JobSet named QUEUED\_ORDER\_SUBMISSION. You must activate and schedule this process for the automatic processing of *Queued* orders to occur.

On submission by the Scheduled JobSet, the revalidation process repeats the hold validation that is currently performed on order submits. Additionally all effective dated order parameters will be validated against current date:

- Order contact
- Shipment addresses
- Shipment contacts
- Billing addresses
- Billing contact
- Site address

- Site contact
- Order line product for active status

See [Chapter 13, “Managing Orders and Quotes,” page 227](#).

## Future Dated Service Management Orders

Future dated maintenance order functionality works in the same way as order capture. The orders with future dates are queued by the system and automatically executed on the date estimated from the scheduled fulfillment date and affected product action lead time.

Only one scheduled fulfillment date is allowed per order. Start and end date fields on order line details page are visible, defaulted to the scheduled fulfillment date value or the earliest fulfillment date value if the scheduled fulfillment date is not set. These dates are editable based on the Order Capture Business Unit setting for *Line Dates Editable on Order*:

- *Change Features* – no dates visible on the order line details.
- *Disconnect Service* – end date populated based on the scheduled fulfillment date.
- *Suspend Service* – start date populated based on the scheduled fulfillment date; end date not visible.
- *Suspend/Resume Service* - start date populated based on the scheduled fulfillment date; end date editable, must be filled in by the user.
- *Resume Service* – start date populated based on the scheduled fulfillment date.

The process that is run daily to resubmit regular orders will also handle Service Management orders. It is run daily to submit outstanding future dated orders scheduled for the current date. If the order execution date is current or earlier than the current date the order will be submitted. The validation will be repeated to ensure the order is still valid. If the validation fails, the order will be put on hold. Otherwise the order status will be changed from *Queued* to *Submitted* and the business project will initiate.

The process that is run daily is the Scheduled JobSet named `QUEUED_ORDER_SUBMISSION` and must be activated and on a schedule for the automatic processing of *Queued* orders to occur.

On submission by the Scheduled JobSet, the revalidation process will repeat the hold validation that is currently performed on order submits. In addition, the service structure will be re-validated to confirm that the service order is still viable in the context of any service changes that could have occurred in the lag time between order capture and the order execution date. The min/max components, product relationships, and order line actions will be validated against the current service base. The validation will fail if:

- The number of components doesn't match min/max specified for the package.
- The product prerequisite is missing.
- The order is for the removal of an already removed product.
- The order is for the addition of an already added product.
- The order is for the suspension of an already suspended product.
- The order is for the resumption of an already resumed product.

See [Chapter 9, “Working with PeopleSoft Service Management,” page 145](#).

## Multiple Future Orders for the Same Service

You can create a future dated order for a service when there are already outstanding future dated service management orders against the service. Future dated orders are scheduled for future processing and executed on the calculated order execution date. Only one order for the same service can be processed at the same time. If another order is being processed on the order execution date, it will be omitted and put on hold. Orders will be executed one after another based on order execution date (not scheduled fulfillment date).

When creating a new service order for a service or number of services, the list of all outstanding queued orders for these services is displayed. Instead of proceeding with the new order, you will be able to select and maintain the existing order.

A new link, Display All Queued Orders for Selected Services, is displayed on the order form to enable finding all currently queued orders for the selected services. The list is dynamically generated, so only current information is provided.

If there are other outstanding orders already queued for the same service, the validation check performed on order submit will ensure that order execution time frames do not overlap. If the validation fails, the order will be put on hold. Possible holds are:

- Fulfill By date is before earliest fulfill by date.
- Service disconnect or suspend before queued order.
- Order execution time frames overlap.
- Queued orders with installed products.
- Order revalidation after being queued.
- Validate start and end dates on Service Management.

## Future Dated Bulk Orders

You can create a bulk order for future dated service activation or product fulfillment. The order is captured immediately; child orders are generated; submitted, and queued by the system for future processing.

Once child orders have been created from the bulk order, the scheduled fulfillment dates of the individual orders may be modified between the time the orders are generated and the time that they are submitted for processing.

The scheduled fulfillment date is copied from the parent bulk order onto each generated child order. If the scheduled fulfillment date is a future date, the child orders will be processed as future dated orders on order submission, and the child order will be queued if necessary.

See [Chapter 14, “Working with Bulk Orders,” page 279](#).

## Future Dated Bulk Service Management Order

You can create a bulk service management order for future dated service activation or product fulfillment. The order is captured immediately; child orders are generated; submitted, and queued by the system for future processing.

Once child orders have been created from the bulk order, the scheduled fulfillment dates of the individual orders may be modified between the time the orders are generated and the time that they are submitted for processing.

If any child orders generated from the bulk service modification have pre-existing future dated service orders pending against them, those orders will be put on hold and must be reviewed by a CSR before they can be processed.

The scheduled fulfillment date is copied from the parent bulk service management order onto each generated child order. If the scheduled fulfillment date is a future date, the child orders will be processed as future dated orders on order submission and the child order will be queued if necessary.

## Pages Used to Create Future Dated Orders

Page Name	Object Name	Navigation	Usage
Order	RO_FORM	Orders and Quotes, Add Order, Order	Create an order for future dated service activation or product fulfillment. The order is captured immediately, submitted, and queued by the system for future processing.
Address Book	RX_ADR_SEL_ADDRESS	Click View Addresses button on Order page.	View effective dated addresses.

## Creating a Future Dated Order

Access the Order page: Entry Form tab.

**Order**

Convert to Quote | Clone | Add Order | Search | Refresh | 360 360-Degree View | Personalize

**Order ID** COM0500115      **Order Status** Complete Order  
**Customer** [Softgear Inc.](#)      **Customer Value** Platinum ★★★★★  
**Contact** [Mary Beth Harrington](#)      **Credit Rating** 0

**Entry Form** | Line Details | Holds | Notes | Related Actions | History

Go To

**Customer**

**Customer** [Softgear Inc.](#)      **Account** 100250105  
**Contact** [Mary Beth Harrington](#)

**Order Details**

**Business Unit** COM01 - Communications      **Status** Complete

**Description**

**Fulfill By** 07/14/2006      **Earliest** 07/14/2006

[Show Details](#)

**Line Summary**

Line	Product Description	Product ID	UOM	Order Quantity	Options	List Price	Unit Price	Recurring Price	Recurring Frequency	Status
1	<a href="#">Digital Wireless Package</a>	TEL200001	Each	1.0000	<a href="#">Par-190/367-4508</a>	12.20	12.20	33.00	Monthly	Complete
	<a href="#">Any Time Minutes</a>	TEL200002	Each	1.0000		0.00	0.00			Complete
	<a href="#">300 Anytime Minutes</a>	TEL200004	Each	1.0000		11.00	11.00	31.00	Monthly	Complete
	<a href="#">Caller ID</a>	TEL200013	Each	1.0000		1.20	1.20	2.00	Monthly	Complete

Order page: Entry Form tab

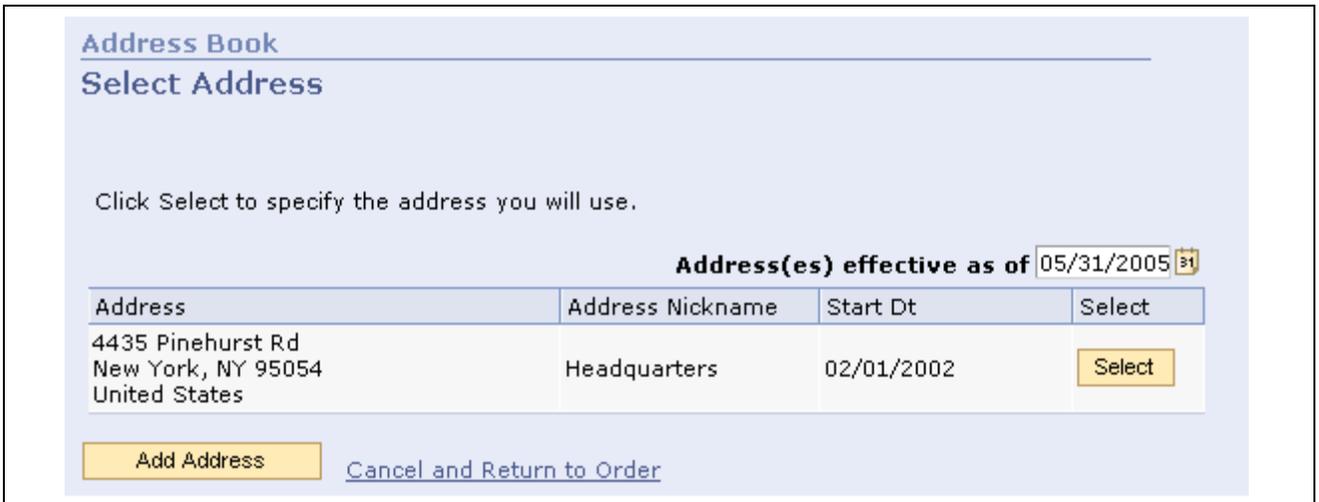
### Order Status

Future dated orders display *Queued Order* status prior to the Fulfill By date.

- Fulfill By** Select a date in the future to queue the order for future processing.  
By default this field will be empty. This field is not required on save, but it is required on order submit. If you do not explicitly specify this date before order submission, the order is scheduled for immediate execution.
- Earliest** Calculated by the system this shows the earliest the order can be fulfilled. It is based on the products lead times from the order. If the Earliest Fulfill by is the current date it does not show.

### Future Dating Addresses

Access the Address Book page.



Address Book page

- Address(es) effective as of** The system defaults to the date selected in the Fulfill By field. If no date is selected in Fulfill By field, the system assume the order will be submitted immediately and does not show the Address(es) effective as of field.

---

## Modifying Future Dated Orders

This section discusses how to modify existing future dated orders.

**Note.** This section discusses only those fields which are impacted by future dated order functionality. Refer to the following chapters for detailed information on all fields found on these pages.

---

## Pages Used to Modify Future Dated Orders

Page Name	Object Name	Navigation	Usage
Entry Form	RO_FORM	Service Management, View Service Management Order, Entry Form	Access a queued order for order maintenance.
Order	RO_FORM	Orders and Quotes, Search Orders and Quotes, Order Enter a status of <i>Queued</i> and click the Search button.	Access a queued order for order maintenance.
History	RO_HISTORY	<ul style="list-style-type: none"> <li>Service Management, View Service Management Order, History</li> <li>Orders and Quotes, Search Orders and Quotes, History</li> </ul>	View the audit trail of all order changes.

## Modifying Future Dated Orders

Access the Entry Form page.

Entry Form page



Click the Maintenance toolbar button to edit the fields. After clicking the Maintenance button, all applicable sections will be editable. When the order is submitted after Maintenance, all holds need to be cleared if any are found before the updates are applied to the *Queued* order. No copy is made of the order like in Order Maintenance, changes to the *Queued* order are applied directly to the order once holds are passed.

**Note.** When you submit, the Change Summary data is transferred to the History tab.

## Viewing History

Access the History page.

Order

Copy to Quote | Clone | Add | Update | Refresh | 360 360-Degree View | >> [Personalize](#)

<b>Order ID</b> CRO0307080 <b>Customer</b> <a href="#">Apex Systems</a> <b>Contact</b> <a href="#">Mary Lewis</a>	<b>Order Status</b> Queued Order <b>Customer Value</b> Gold★★★★ <b>Credit Rating</b> 0
---	--

Entry Form | Line Details | Holds | Notes | Related Actions | **History** | Fulfillment

[Change History](#) | [Interaction History](#) | [Show All History](#)
Go To

**Change History** [Customize](#) | [Find](#) |  First  Last

#	Description	Changed By	Associated Date	History Status
1	Saved in Hold Status	Sandy Garcia	05/25/2005 12:12PM	Audit
2	Changed Total Price on Header to 200.63 from 225.63.	Mary Smith	05/25/2005 1:31PM	Confirmed
3	Changed Last Maintained Timestamp on Header to 05/25/2005 1:31PM PDT from 05/25/05 12:12PM PDT.	Mary Smith	05/25/2005 1:31PM	Confirmed
4	Changed Row Last Maintained User ID on Header to INF_DEV from sgarcia.	Mary Smith	05/25/2005 1:31PM	Confirmed
5	Changed Price on Line to 200.63 from 225.63.	Mary Smith	05/25/2005 1:31PM	Confirmed
6	Changed Price Protected on Line to Y from N.	Mary Smith	05/25/2005 1:31PM	Confirmed

There are no interactions related to this record.

History page



## CHAPTER 12

# Working with Subscription Management

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

- Set up subscription management.
- Manage subscription products.

---

## Understanding Subscription Management

Subscription management enables order capture agents, reps, and managers to record orders and quotes and to perform service management against subscription based products and have these transactions fulfilled and billed.

Subscription management contains four major components:

- Defining subscriptions.

Prior to offering subscriptions, pricing and product managers define the enterprise subscription business. This includes setting up subscription terms, schedules, subscription products, and subscription pricing. Order capture administrators set up order cancellation reason codes that are used to track cancellations in service management.

- Recording customer subscriptions.

When customers and order capture users capture orders for subscription products, they have the ability to specify the length of the subscription and the installment-billing schedule. An installed service is created and used to track the new subscription.

- Managing customer subscriptions.

Customers may wish to cancel, change, suspend, or resume a subscription that they previously established with the enterprise. Management of the subscriptions is simplified so that an order capture user can manage multiple subscriptions for a single customer within one transaction. If a customer cancels a subscription, the reason is tracked for better analysis of lost business. The installed service is updated to reflect the service management related change.

- Billing customer subscriptions.

Customers are billed based on the subscriptions that they receive, the length of those subscriptions, and the interval that they have specified. Integration with the Transaction Billing Processor (TBP) is required for automatic billing; out of the box this is set up in core order capture, but not necessarily in the verticals since they assume a different billing integration.

---

## Setting Up Subscription Management

To set up subscription management, use the Subscription Terms (PROD\_SUBSCRIPT) component.

Successful implementation of subscription management functionality depends on several setup steps:

- Define schedules.

Define the schedules that your enterprise offers customers for subscriptions. This is required setup to support the ability to take orders and quotes for subscriptions. Schedules leverage the existing billing schedule setup that is used in CRM Financials and Supply Chain Management. The data is maintained in CRM through a one-way synch with FIN/SCM.

See *PeopleSoft Financials, Enterprise Service Automation and Supply Chain Management Application Fundamentals 9 PeopleBook, Defining Financials and Supply Chain Management Common Definitions*

- Define subscription terms.
- Define reason codes.

Reason codes expand on the hold denial codes in the setup workbench. Reason codes use the *Cancellation Reason* type to denote cancellation reasons.

See [Chapter 4, “Setting Up PeopleSoft Order Capture,” Setting Up Order Capture Tables, page 34.](#)

- Activate the subscription hold.

For subscription products, the Order Capture Administrator activates subscription hold SUBSCR that is defined out of the box. This hold includes checks for:

- Subscription start date that is past or missing.
- Subscription term missing with subscription product on order.
- Subscription schedule missing with subscription product on order.

- Configure order capture business units.

The order capture administrator can configure subscriptions ordering for an Order Capture business unit. A default Schedule and Subscription term can be specified at the business-unit level.

See [Chapter 3, “Defining Order Capture Business Units,” page 15.](#)

- Define subscription products.

The product manager defines subscription products that customers can order. This is required setup for the ability to take orders and quotes for subscriptions. The process uses a product type of *Subscription* and a display template for subscription products called PROD\_DEFN\_SUB. When the subscription is created, the UOM is automatically created as *Each*. When defining subscription products, do not use recurring pricing, frequency, duration fields, or service feature fields.

Packages can contain subscription products. Packages with subscription products should be priced at the component level only.

Since SCM static packages cannot contain any *service* type products, subscriptions are only included in lightly configured packages.

See [Chapter 5, “Understanding Product, Pricing, Proration, and Catalogs,” page 79.](#)

- Define subscription pricing.

The pricing manager defines pricing rules for subscription products using new pricing keys for schedule, subscription term, and subscription type product. The process follows the existing pricing rule setup procedures, with the new ability to define pricing rules based on the Schedule chosen by the customer, and by the length of the subscription term defined by the customer at time of placing an order or quote for the subscription product

Using the marketing application, you can define basic price rules using only the customer, product, and offer keys. Subscription management pricing keys are not accessible directly in the Marketing application. . If you need to edit a price rule that was created from marketing, you can use the Price Rule page to modify the condition to include additional price keys that could not be populated in marketing.

---

**Note.** Although you can use subscription products in promotions, you can not create promotions that include the subscription term as part of the promotion.

---

See *PeopleSoft Enterprise CRM Enterprise Pricer 9 PeopleBook*, “Creating Price Rules”.

## Pages Used to Set Up Subscription Management

Page Name	Object Name	Navigation	Usage
Schedules	SCHEDULE	Set Up Financials/Supply Chain, Common Definitions, Calendars/Schedules, Schedules	Create schedules for billing frequency. CRM allows another billing opportunity on the Account page with the One Time Payment feature available to the customer service representative.
Subscription Terms	SUBSCRIPT	Products CRM, Subscription Terms	Define the subscription terms offered for the product.
Reason Codes	RO_DEFN_HLD_DEN	Set Up CRM, Product Related, Order Capture, Set Up Workbench, Reason Codes	Define, for tracking purposes, the reasons that customers cancel subscriptions.
Hold Codes	RO_DEFN_HLD	Set Up CRM, Product Related, Order Capture, Set Up Workbench, Hold Codes	Activate subscription holds delivered by PeopleSoft.
Order Capture Definition	BUS_UNIT_RO1	Set Up CRM, Business Unit Related, Order Capture Definition, Internal	Specify defaults in the business unit for subscription ordering.
Product Definition	PROD_DEFN	Products CRM, Product Definition, Definition	Define subscription products.
Conditions	EOEP_CONDITION	Pricing Configuration, Price Rule, Conditions	Define pricing rules for subscription products using pricing keys for schedule, subscription term, and subscription type product.

## Defining Subscription Terms

Access the Subscription Terms page.

### Subscription Terms

<b>Subscription Term</b> 1YEAR	<b>SetID</b> SHARE
<b>*Status</b> <input type="text" value="Active"/>	<b>*Duration</b> <input type="text" value="1"/>
<b>*Description</b> <input type="text" value="1 Year Term"/>	<b>*Frequency</b> <input type="text" value="Years"/>
<b>Long Description</b> <input type="text" value="1 Year Term"/>	

Subscription Terms page

The term is used as the length of time for the subscription being ordered. It should be used in conjunction with the product list price to determine pricing for the subscription.

**Duration** Enter the number to apply to the duration frequency.

**Frequency** Select the frequency to apply to the numeric duration, such as months or years. Combined with the Duration this determines the length of time for the subscription.

---

## Creating a Subscription Order

This section provides an overview of subscription orders and discusses how to create a subscription order.

### See Also

[Chapter 13, "Managing Orders and Quotes," page 227](#)

## Understanding Subscription Orders

This table provides details on subscription order processes:

Process	Detail	Reference
Browse and search catalog	<p>The flow for the order capture representative or self-service user browsing and searching the catalog is identical for subscription and non-subscription products.</p> <p>Subscription products must be configured to display in the internal catalog.</p>	<p>See <a href="#">Chapter 5, "Understanding Product, Pricing, Proration, and Catalogs," Catalog Setup, page 87.</a></p>

Process	Detail	Reference
View submitted orders	<p>The flow for the order capture representative or self-service user viewing submitted orders is identical for subscription and non-subscription products.</p> <p>Subscription Term, Schedule, and Start Date are displayed as read-only.</p>	See <a href="#">Chapter 13, “Managing Orders and Quotes,” Creating Orders or Quotes, page 238.</a>
Create subscription quote	The flow to create a subscription quote is the same as the flow for subscription orders.	See <a href="#">Chapter 13, “Managing Orders and Quotes,” Entering Orders or Quotes, page 239.</a>
Convert subscription quote to order	<p>The flow for the order capture user converting subscription orders to quotes is identical for subscription and non-subscription products.</p> <p>Converted orders are placed on hold if the subscription start date is in the past.</p> <p>Self-service users can convert quotes created internally with subscription products to orders.</p>	See <a href="#">Chapter 13, “Managing Orders and Quotes,” Creating Orders or Quotes, page 238.</a>

Process	Detail	Reference
Convert lead or opportunity to quote or order	<p>Sales users can capture leads and opportunities that contain subscription products. The lead or opportunity pages do not require Subscription Term or Schedule to be specified.</p> <p>The sales user creates a lead or opportunity adding subscription and non-subscription products to the proposal.</p> <p>When the sales user is ready to create an order or a quote, they do so from the Propose tab. The order or quote is created and the customer and product detail is copied.</p> <p>The subscription term, schedule, and start date must be specified prior to the quote or order being submitted.</p> <p>Orders and quotes with subscription products created from leads or opportunities are handled identically for subscription and non-subscription products.</p>	See <i>PeopleSoft Enterprise Sales 9 PeopleBook</i> , “Managing Sales Leads and Opportunities”.
Create order through telemarketing	Telemarketing users can create an order by populating products from a telemarketing branch script. Subscription products are supported through telemarketing, however the attributes of schedule, subscription term, and start date are populated on the order when the telemarketing user is transferred there.	See <i>PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook</i> , “Using PeopleSoft Telemarketing”.

## Page Used to Create a Subscription Order

Page Name	Object Name	Navigation	Usage
Add Order	RO_FORM	Orders and Quotes, Add Order	Create a subscription order.

## Creating a Subscription Order

Access the Order page.

### Order

Submit
Save
Validate
Convert To Bulk
Add
Update
Cancel
Personalize

**Order ID** New

**Customer** Bob Johnson

**Contact** Lisa Lewis

**Order Status** New Order

**Customer Value** ★★★★

**Credit Rating** 0

Entry Form
Line Details
Holds
Notes
Related Actions
History
Fulfillment

Go To Select One...

**Customer**

**Customer** Bob Johnson **Contact** Lisa Lewis

[Search Again](#)

**Order Details**

**\*Business Unit** US001 - US001 NEW YORK OPERAT

**Promotion**

**Fulfill By** 05/16/2005

**Subscription Term** 1 Year Term

**\*Status** New

**Priority** Medium

[Show Details](#)

Order page (1 of 3)

### Line Details

Products
Pricing Adjustments
Availability

Line	Product Description	Product ID	UOM	Order Quantity	List Price	Unit Price	Start Date	End Date		
1	<a href="#">New York Times</a>	18000	Each	1.0000	125.00	137.50	05/16/2005	05/15/2006		

Enter Product ID or Description - Power Add using Product,Quantity,Units;Product,Quantity,Units format

**Add Product(s)**  Add [Search or Browse Catalog](#) [Get Recommendations](#)

[Get Product Promotions](#)

**Shipping Summary**

**Customer** Bob Johnson

**Address** 423 Pleasant Drive San Ramon

**Shipping Method**

**Contact** Lisa Lewis

[Advanced Options](#)

Order page (2 of 3)

**Billing Summary**

Customer [Bob Johnson](#)

Address

PO Number

Contact

Schedule

PO Received

---

Invoice      Payment Terms

---

Credit Card      \*Credit Card  [Edit](#)

**Totals**

Description	Amount	Currency
One Time Charges	137.50	
Discount	0.00	
Surcharge	0.00	
<b>Total One Time Charges</b>	<b>137.50</b>	USD

---

[Top of Page](#)

Order page (3 of 3)

**Note.** The discussion in this section focuses on fields specific to subscription management.

**Fulfill By** Select the start date for the subscription. The system populates the Start Date in the order line with this date. If the date is in the future, the order might be queued after it is submitted. If queued, the order is automatically submitted and fulfilled in the background at a later date.

These fields appear only for subscription products. You can add subscription and non-subscription products to the same order.

**Subscription Term** Select the length of time the subscription will run. If you selected a default value for this business unit, the value will automatically appear. If no default is defined, or the default value from the business unit has become inactive, the subscription term is left blank on the order.

**Start Date and End Date** The Start Date is populated from the Fulfill By field. The end date is calculated by adding the subscription term to the start date. The start or end dates cannot be manually overridden.

**Schedule** Select the schedule for the bill payment frequency. If you selected a default value for this business unit, the value will automatically appear. *One Time Charge* is available for use with subscriptions. If no default is defined, or the default value from the business unit is inactive, the billing Schedule is left blank on the order.

## See Also

[Chapter 11, "Working with Future Dated Orders and Temporary Services," page 201](#)

## Managing Subscriptions

This section provides an overview of subscription management and discusses manage subscriptions.

### Understanding Subscription Management

During the business process that is triggered upon submission of a subscription order, an installed service is created and the customer is billed.

This table provides details on the processes that are part of subscription management:

Process	Details	Reference
Maintain subscriptions.	Enterprise users manage subscriptions on behalf of the customer through service management. The enterprise user can make changes to, cancel, suspend, and resume existing customer subscriptions.	See <a href="#">Chapter 9, “Working with PeopleSoft Service Management.”</a> <a href="#">Working with Service Management, page 152.</a>
Create installed service.	An installed service is created for each subscription product entered on the order and the customer’s installed product history is updated.  The installed service history of the creation and any changes that have been made to the service are visible.	See <i>PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook</i> , “Tracking Installed Products and Assets”.

Process	Details	Reference
Maintain installed service.	<p>Installed service maintenance for single or multiple service management lines is handled through a business project.</p> <p>The installed service becomes inactive at the end of the customer's term. To inactivate expired subscriptions, the system checks for installed services that have end dates in the past and cancels them.</p> <p>The customer's installed service is updated for every subscription product that is maintained, and the installed product history is updated.</p>	See <i>PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook</i> , "Tracking Installed Products and Assets".
Bill the customer.	<p>The system generates the customer's bills based on the schedule and subscription term that are specified on the order. The system handles any updates that are required to the customer's bill. For example, if the customer's bill is impacted by changes that have been made to the installed subscription such as cancel, suspend, or resume, then a billing adjustment (debit or credit) is made for the customer. The billing process is handled through the business project interface to the Transaction Billing Processor (TBP).</p> <p>If a customer cancels a subscription that was not paid with a one time schedule, the system generates credit for any paid portion of the subscription that was not received by the customer and cancels any future bills. If a customer cancels a subscription that is paid with a one time schedule, no automatic credit is given.</p>	See <a href="#">Chapter 8, "Integrating with Fulfillment and Billing Systems."</a> <a href="#">Integrating with Billing Systems, page 142.</a>

## Pages Used to Manage Subscriptions

Page Name	Object Name	Navigation	Usage
Manage Service	RO_FORM	Service Management, Maintain Service, Manage Service	Cancel, suspend, and resume existing customer subscriptions
Manage Service	RO_FORM	Service Management, Maintain Service, View Service Management Order	Search for any transactions to manage customer subscriptions.

# Managing Subscriptions

Access the Manage Service page.

Manage Service page (1 of 2)

Manage Service page (2 of 2)

## Line Action

Select a service management action.

If you select *Cancel*, the Cancellation Reason drop down box appears. An End Date needs to be set to determine the date of the cancellation. Depending on business unit settings this date might be read only. Use the Fulfill By date in the order header, if the date automatically populated is not what you want.

If you select *Suspend Service*, select a Fulfill By date to set the date of the suspension. Depending on business unit settings the Start Date may be read only. Use the Fulfill By date in the order header, if the date automatically populated is not what you want.

If you select *Resume Service*, select a Fulfill By date to set the date of the resumption. Depending on business unit settings the Start Date may be read only. Use the Fulfill By date in the order header, if the date automatically populated is not what you want.

# CHAPTER 13

## Managing Orders and Quotes

This chapter provides an overview of Order Capture and discusses how to:

- Personalize Order Capture.
- Create orders or quotes.
- Create configurations.
- Enter shipping, payment, and billing information.
- View price adjustments.
- Add notes.
- View summaries.
- Manage holds.
- Maintain orders.
- View related actions.
- View history.

---

### Understanding Order Capture

This section lists common elements and discusses:

- Order Capture functionality.
- Hotkeys.
- Order Capture access.
- Delivered User IDs and User Roles.
- Support for Industry-Specific Dynamic Events.
- Correspondence Generation.

### Common Elements Used in This Chapter

Functional buttons in the header and footer toolbars on each Order Capture page are available to the customer service representative (CSR).

#### Functional Buttons in the Header or Footer

The following buttons and links provide one-click functionality for Order Capture:

<b>Submit</b>	Click to save and submit the order or quote for processing.
<b>Save</b>	Click to save the order or quote in its current state.
 <b>Validate</b>	Click to validate the quote or order and fire all the hold conditions. Use this button to do hold checking without actually submitting the order.
 <b>Upsell</b>	This appears if a marketing campaign is associated with the consumer or company that has been identified on the quote or order, and there is an upsell possibility.
 <b>Convert To Bulk</b>	Click to change the current order to a bulk order. Bulk orders are used as a template to create multiple orders.
<hr/> <b>Note.</b> Convert To Bulk is only available for orders. <hr/>	
 <b>Add</b>	Click to initiate a new quote or order.
 <b>Search</b>	Click to access the quote and order search page.
 <b>Cancel</b>	Click to cancel the current quote or order.
<hr/> <b>Note.</b> Cancel is only available when edits are allowed. <hr/>	
 <b>Refresh</b>	Click to refresh the view for the current page. This also refreshes the view of an <i>Open</i> or <i>In Process</i> order that is in the fulfillment cycle with a live status update if the integration point is enabled.
 <b>Copy to Quote</b>	Click to convert a quote to an order or copy an order to a new quote.
<hr/> <b>Note.</b> You cannot convert expired quotes to orders. Only quotes with an expiration date and that date has not expired can be converted to an order. <hr/>	
 <b>Clone</b>	Click to clone the current order or quote and create a copy of the current instance.
 <b>Maintenance</b>	Click to begin order maintenance activity for an order submitted to fulfillment, or to begin revision of an open quote.
<hr/> <b>Note.</b> Maintenance appears only after you submit a quote or order. Maintenance is only allowed during certain circumstances once the order is submitted based on the order processing. Queued orders are maintainable. <hr/>	
 <b>Send Correspondence</b>	Click this button to activate print or email correspondences.
<hr/> <b>Note.</b> Send Correspondence appears after you submit a quote or order. <hr/>	
 <b>360-Degree View</b>	Click to launch the 360-degree viewer.
<b>Personalize</b>	Click to access the Personalize Toolbar page, where you can:
<ul style="list-style-type: none"> <li>• Select which buttons to display.</li> </ul>	

- Organize the order of the buttons.
- Select to display or hide the buttons and text.

## Display-Only Text in the Header Toolbar

Order Capture displays the following identifiers in the toolbar:

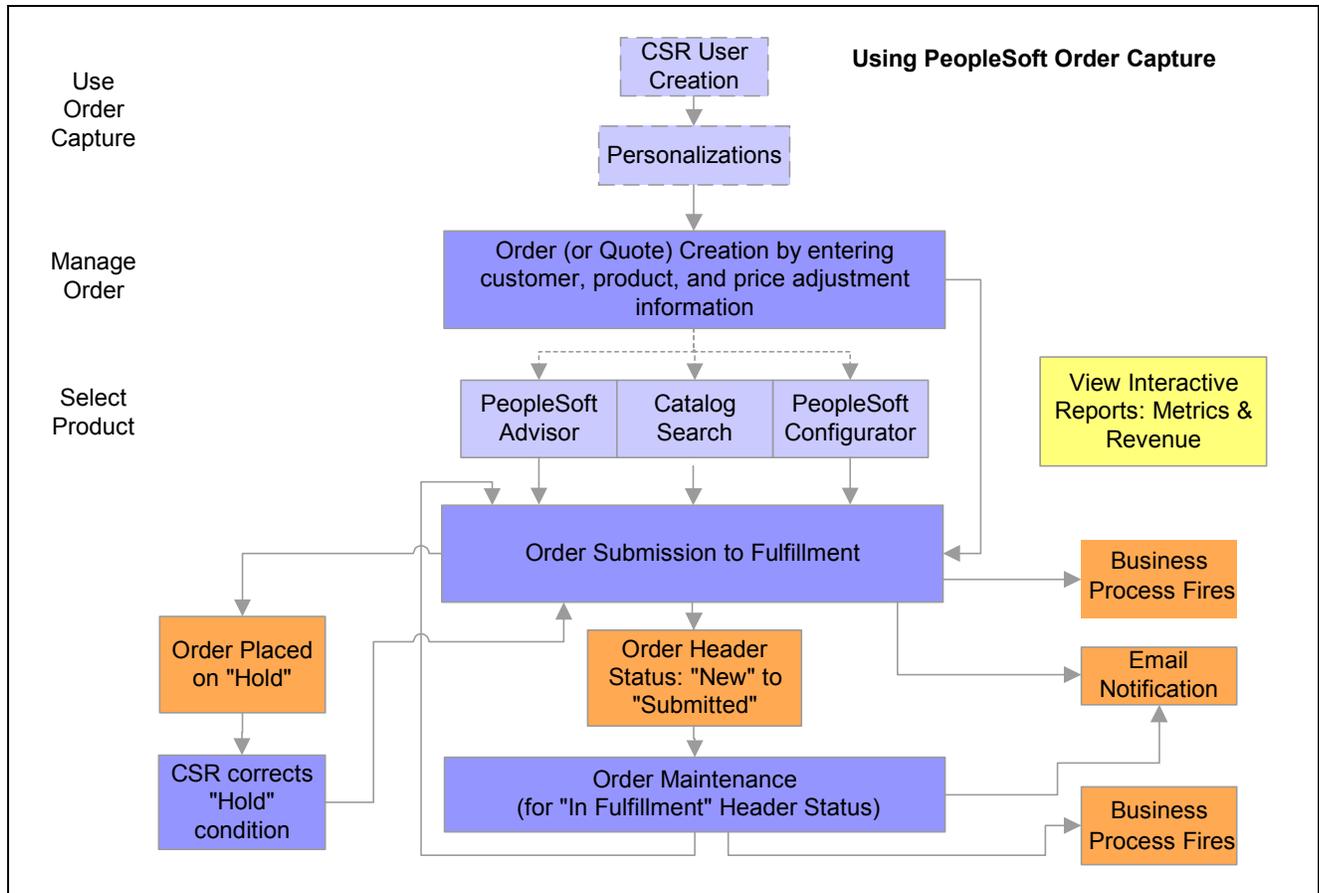
<b>Order ID/Quote ID</b>	Order Capture sequentially generates order and quote IDs based on Automatic Numbering options or by an ID drawn from the Capture Type Workbench setup.
<b>Order/Quote Status</b>	Order Capture delivers many different statuses including: <i>Open, Pending, Submitted, Hold, Complete, Queued, or Canceled.</i>
<hr/>	
	<b>Note.</b> You can add or modify statuses that are applicable to your business process in the Setup Workbench.
<hr/>	
<b>Customer</b>	This is a Sold To company or Sold To consumer.
<b>Customer Value</b>	This is a configurable data element from the Customer Data Model that displays a specific customer demographic.  See <i>PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook</i> , “Defining Company Business Objects”.
<b>Contact</b>	This is a Sold To contact for the company or consumer.
<b>Credit Rating</b>	Displays the customer’s credit rating based on what is in the Customer Data Model.

## See Also

[Chapter 4, “Setting Up PeopleSoft Order Capture,” Defining Header Statuses, page 43](#)

## Order Capture Functionality

The following graphic identifies the functionality available to the Order Capture CSR:



Using Order Capture

Order Capture is designed to enable easy order management for the CSR. The Order Capture system seeks to maximize system resources so as to minimize the CSR's energies. For example, Order Capture:

- Delivers pages that facilitate rapid order capture.
- Provides icons, hotkeys, and tab ordering to reduce the number of keystrokes and mouse clicks.
- Limits the number of page refreshes (or server trips) so that there is minimal waiting time, if any.
- Defaults known information whenever possible.
- Utilizes a header toolbar that contains functional icons and pertinent display-only order information.
- Provides personalization capabilities to the CSR, whereby the CSR or system administrator can define the preferred means of data entry of product information into the order.
- Enables the CSR to easily personalize orders and quotes.

## Hotkeys

Order Capture simplifies the order entry process by providing the following hotkeys at the header level and the line level.

Use the following hotkeys for header level activity.

- Alt + hotkey**
- *I* - Save
  - *0* - Refresh

- *U* - Upsell
- *V* - Convert
- *C* - Clone
- *M* - Maintain
- *A* - Add Product
- *S* - Update Mode

## Order Capture Access

You can create or view orders and quotes using various queues.

### Direct Navigation

A CSR can access Order Capture directly by selecting Orders and Quotes on the PeopleSoft CRM menu. From within Orders and Quotes, the main options are:

- Add Quote.  
Create a new quote. This option takes you directly to the quote form for quick and direct access.
- Add Order.  
Create a new order. This option takes you directly to the order form for quick and direct access.
- Add Bulk Order.  
Create a bulk order. This option takes you directly to the bulk order form and allows you to select multiple recipients that will receive an order.
- Search Orders and Quotes.  
Search to find an existing order or quote. This option provides direct access to a search component to find an existing order or quote. From there, you can find the orders that you are looking for and access those orders for inquiry or maintenance purposes.
- Find Products.  
Search or browse for a specific product within a specific catalog or across all catalogs.

### From PeopleSoft Sales

Sales representatives can navigate to quote or order capture from the Products section of the Leads or Opportunities page in PeopleSoft Sales. They can specify a product and then navigate directly to the Entry Form within Order Capture. Customer and product information relevant to Order Capture then pre-populates from the lead or opportunity to the corresponding order and quote entry fields.

### From the 360-Degree View

The 360-degree view of the customer also allows for order and quote entry. CSRs can select the Order/Quote value from the Add Transaction field in Interaction Manager, which takes them directly to the Add a New Order or Quote Capture page in Order Capture. Known values from the 360-degree view pre-populate the main order entry page.

CSRs can also view recent orders and quotes from their workspaces in Interaction Manager. CSRs see each of the following, by default:

- Order ID/Quote ID.

- Date of order/quote creation.
- Order/quote status.

CSRs can navigate to an existing quote or order by using a link on the order ID or quote ID.

### From CTI Integration

Order Capture integrates with PeopleSoft CTI capabilities. A customer can enter an order ID by using the telephone, and a successful match launches order status for that order ID.

### Additional Access

Order Capture functionality is also accessible from:

- PeopleSoft Active Analytics Framework actions
- PeopleSoft Marketing
- PeopleSoft Advisor

## Delivered User IDs and User Roles

Order Capture delivers the following users and roles:

User ID	Role Name	Role Description	Access
OCADMIN	Order Capture Admin	Administrator	All Order Capture functionality, including the ability to set up Order Capture, but minus the ability to remove holds.
OCMGR	Order Capture Manager	Manager	All Order Capture functionality, including the ability to remove holds but minus the ability to set up Order Capture.
OCREP	Order Capture Rep	CSR (Customer Service Representative)	All Order Capture functionality, except for 1) the ability to remove holds placed on orders, and 2) the ability to do set up.

You can adopt the users and roles that Order Capture delivers, or you can modify them to suit your business needs.

---

**Note.** To modify permissions for the delivered user roles, navigate to PeopleTools, Security, Permissions & Roles, Roles.

---

## See Also

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

## Correspondence Generation

Order Capture generates correspondence automatically and manually:

- Automatic correspondence is initiated at the point of order or quote submission.
- Manual correspondence is initiated when the Send Correspondence button in the toolbar is clicked.

Upon order or quote submission, Order Capture sends automatic email based on the MCF Type setup for Order Confirmation, Quote Confirmation and Order change. A related object is created for each automatic acknowledgement of a correspondence. This appears on the Related Actions tab for the order or quote. Related actions are not created for manual correspondence.

For manual notifications, the CSR clicks the button to access a Create Correspondence page where she can send text messages to pre-populated recipients through different communication channels, either email or print. Order Capture delivers two templates that can be used when a correspondence is sent:

- *Order Confirmation* is a thank you note with order status information for the customer.
- *Quote Confirmation* is a note stating that the quote has been registered by the system.

You can add attachments to the text message and you can also schedule its exact delivery. After a correspondence is sent, the system automatically creates an interaction on the 360-Degree View for the associated contact.

---

**Note.** Before creating a correspondence, make sure that a contact is available on the entry form. The system pre-populates the Recipients field of the correspondence request with the contact defined for the order.

---

The following table summarizes the possible correspondence activity for Order Capture:

Template Name	Channel	Description of Action
Order Confirmation	Email and Print	<p>Emails an order confirmation with the order number, customer name, status, products, billing and shipping information.</p> <p>Prints a PDF, RTF, or Word document version of order confirmation with the same details as in the email.</p>

Template Name	Channel	Description of Action
Order Maintenance	Email and Print	<p>Emails a text of order maintenance with the order number, customer name, status, order change details, products, billing and shipping information.</p> <p>Prints a PDF, RTF, or Word document version of order maintenance with the same details as in the email.</p>
Order Status	Email	The order inquiry application service in ERMS uses this template to respond to structured email with the status of the order.
Order Status - Failure	Email	The order inquiry application service in ERMS uses this template to respond to structured email that does not provide valid data.
Quote Confirmation	Email and Print	<p>Emails a text of quote confirmation with quote number, customer name, status, products, billing and shipping information.</p> <p>Prints a PDF, RTF, or Word document version of quote confirmation with the same details as in the email.</p>
Sales Quote Proposal Letter	All	<p>Emails the quote with an email cover letter, and an attachment of the quote. The quote details contain quote number, expiration date, and product details.</p> <p>Prints a PDF, RTF, or Word document version of the quote, and the quote with the same details as in the email.</p>

### See Also

[Chapter 4, “Setting Up PeopleSoft Order Capture,” Defining MCF Types, page 46](#)

[Chapter 4, “Setting Up PeopleSoft Order Capture,” Defining MCF Types, page 64](#)

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

## Personalizing Order Capture

This section provides an overview of personalization and discusses how to:

- Choose order entry form personalizations.
- Change the default entry form values.
- Configure search criteria.

## Understanding Personalization

You can personalize defaults to make your experience with Order Capture as efficient and as user-friendly as possible. PeopleSoft provides a Personalizations feature that enables you to change the defaults for the most commonly used functions within Order Capture.

---

**Note.** Order Capture also delivers powerful Workbench functionality whereby you create application class sets that modify Order Capture settings to best suit your business processes.

---

### See Also

[Chapter 4, “Setting Up PeopleSoft Order Capture,” page 31](#)

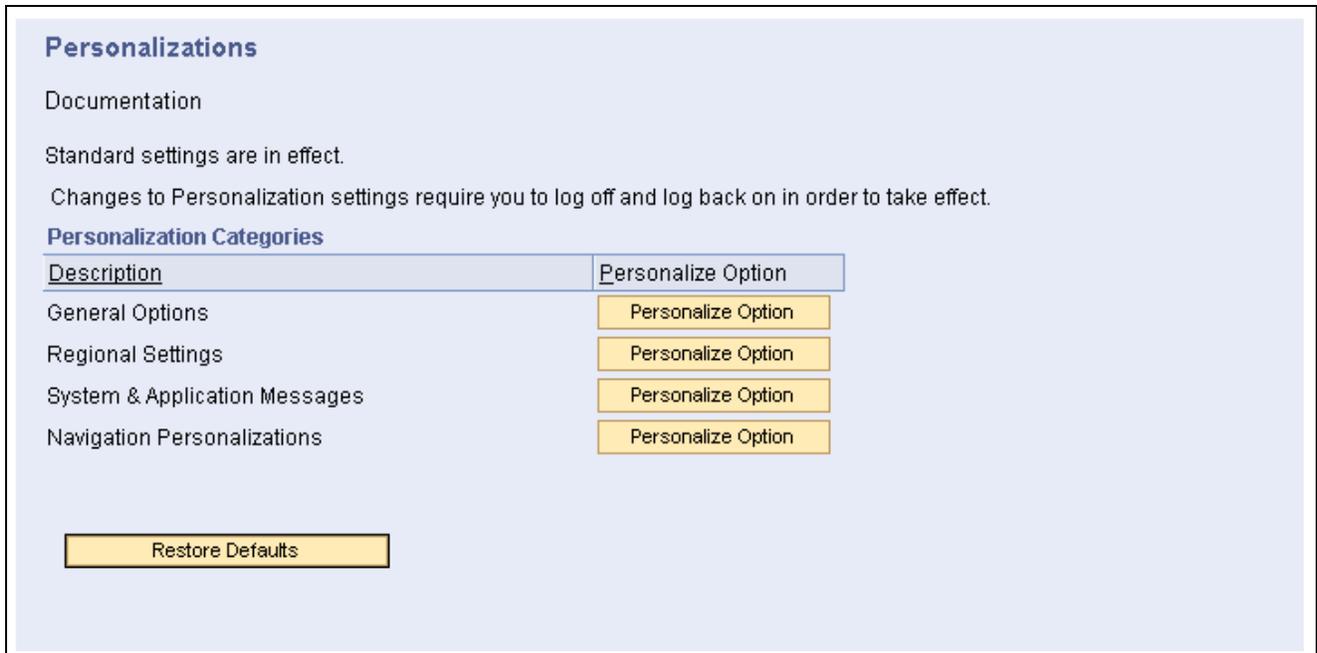
Customer Connection, “Understanding Application Classes in Order Capture and Order Capture Self Service”

## Pages Used to Personalize Order Capture

Page Name	Object Name	Navigation	Usage
Personalizations	PSUSERSELFPRSNL	My Personalizations	Choose order entry form personalizations. You can also restore defaults from this page by clicking the Restore Defaults button.
Option Category: General Options	PSUSERSELFPRSNL	My Personalizations, Click Personalize Options (for General Options Description).	Change the default entry form values or restore category defaults. Override any of six defaults for Order Capture.

## Choosing Order Entry Form Personalizations

Access the Personalizations page.



Personalizations page

**Personalize Option** Click to access the settings for the personalization category. For Order Capture, relevant settings are in the General Options personalization category.

**Restore Defaults** Click to restore default settings for all categories.

## Changing the Default Entry Form Values

Access the Option Category: General Options page.

Option Category: General Options

**Personalizations** Find First 1-11 of 11 Last

Personalization Option	Default Value	Override Value	
Product, Units, Quantity Order	Product/Quantity/Units	<input type="text" value="Product/Quantity/Units"/>	<a href="#">Explain</a>
Product Entry Option	Product ID First	<input type="text" value="Product ID First"/>	<a href="#">Explain</a>
Product Search Option	Try to find Exact Match First	<input type="text" value="Show All Possible Results"/>	<a href="#">Explain</a>
Product Separator	:	<input type="text"/>	<a href="#">Explain</a>
UOM/Qty Separator	,	<input type="text"/>	<a href="#">Explain</a>
Order Capture Business Unit		<input type="text" value="CRMCO APPLIANCES"/>	<a href="#">Explain</a>
Accessibility Features	Accessibility features off	<input type="text" value="Use standard layout mode"/>	<a href="#">Explain</a>
Excel 97 grid download	N	<input type="text"/>	<a href="#">Explain</a>
Time page held in cache	900	<input type="text"/>	<a href="#">Explain</a>
Multi Language Entry	No	<input type="text" value="No"/>	<a href="#">Explain</a>
Spell Check Dictionary	Use session language	<input type="text" value="US and UK English"/>	<a href="#">Explain</a>

Option Category: General Options page

## Personalizations

View the Default Value or Override the Default Value for any of the Personalization Options specified below:

### Product, Units, Quantity Order

Choose a preferred sequence for using the Add Product(s) functionality on the main Entry Form. This allows you to change how you enter multiple products at one time.

### Product Entry Option

Specify whether you want Order Capture to search by *Product Description First* or *Product ID First*. Use this to improve performance by setting the value you normally use to search for products.

### Product Search Option

Specify whether you want Order Capture to search by finding an exact match first or to show all possible results. Use this to improve performance.

### Product Separator

Identify a product line separator. The Add Product(s) field on the Entry Form has powerful processing functionality contained within it. It allows for the insertion of a special character to divide product lines. For example, you can define this as a colon or semicolon, and then during order entry, you could enter two separate sets of product information.

---

**Note.** PeopleSoft system-delivered data specifies a semicolon.

---

### UOM/Qty Separator (Unit of Measure/Order Quantity)

Identify a UOM/Qty separator. The Add Product(s) field on the Entry Form allows for the insertion of a special character to divide information for multiple

product lines. For example, you could add two cases of product 10003 by entering *10003:2:cs*. This would then populate an order line with two cases of product 10003, and would save you time.

---

**Note.** PeopleSoft system-delivered data specifies a colon.

---

**Order Capture Business Unit**

Specify your default business unit. If you regularly use a particular business unit, then this setting saves time during order and quote entry.

## Configuring Search Criteria

Order Capture searches are quite extensive and enable you to find existing orders or quotes in a variety of ways. You can use multiple search criteria to narrow your search for existing orders or quotes. Once you identify the criteria by which you most often search for orders and quotes, you can personalize the Order Capture search pages and save that personalization. The next time that your search page launches, you will work from the personalized search page that you have created.

---

**Note.** If there is more than one result for a search, the results can be distinguished by different criteria, including Customer, Date Created, Status, and Source.

---

---

## Creating Orders or Quotes

This section discusses how to:

- Enter orders or quotes.
- Get product recommendations.
- Start a PeopleSoft Real-Time Advisor Dialog.
- View or modify line details.
- Create service agreements

## Pages Used to Create Orders or Quotes

Page Name	Object Name	Navigation	Usage
Quote - Entry Form, Order - Entry Form	RO_FORM	<ul style="list-style-type: none"> <li>Orders and Quotes, Add Quote</li> <li>Orders and Quotes, Add Order</li> </ul>	Create a new order or quote by entering order details and adding products to the order lines.
Submit Confirmation	RO_SUBMIT_CONFIRM	Click the Submit button on the Quote - Entry Form or Order - Entry Form page.	View a summary of the order or quote.
Order - Line Details, Quote - Line Details	RO_CAPTURELINE_DTL	<ul style="list-style-type: none"> <li>Click the Line Details tab on the Quote - Entry Form page.</li> <li>Click the Line Details tab on the Order - Entry Form page.</li> <li>Click the Product Description link or the Upsell link in the Order Details section on the Order - Entry Form page.</li> <li>Click the Product Description link or the Upsell link in the Quote Details section on the Quote - Entry Form page.</li> </ul>	View upsell or cross-sell opportunities, and check product availability. You can edit line details such as unit of measure, order quantity, unit price, and promotion code. You can also allow partial shipment for this product or create a temporary service if enabled on the product.
Product Advisor List	RO_LISTDISP_SEC	Click the Get Recommendations link on the Quote - Entry Form or Order - Entry Form page.	Select a catalog from the list of catalogs available. You can then launch Advisor dialogs that are associated to the catalog.
PeopleSoft Advisor Dialog Start	RAD_ADVISOR_RUN	Select a catalog on the PeopleSoft Advisor List page.	Use a PeopleSoft Advisor dialog session to recommend a product, service, or solution based upon the buyer's responses to predefined questions.
Check Availability and Pricing	RO_FORM	Click the Availability tab on the Quote - Entry Form or Order - Entry Form page. Then click the Check Availability link.	Create partial shipments, add promotion codes, or view pricing details for order lines.

## Entering Orders or Quotes

Access the Order - Entry Form page.

### Order

**Order ID** OC00632      **Order Status** New Order  
**Customer** [Johnson Medical Instruments](#)      **Customer Value** Gold★★★★  
**Contact** [Gavin Brent](#)      **Credit Rating** 80

[Entry Form](#) | [Line Details](#) | [Holds](#) | [Notes](#) | [Related Actions](#) | [History](#) | [Fulfillment](#)

Go To

---

#### Customer

**Customer** [Johnson Medical Instruments](#)      **Contact**

[Search Again](#)

---

#### Order Details

**Business Unit** APP01 - Appliances      **\*Status**

**Promotion**       **Priority**

**Fulfill By**

[Show Details](#)

Order - Entry Form page (1 of 3)

### Line Details

[Products](#) | [Pricing Adjustments](#) | [Availability](#)

Line	Product Description	Product ID	*UOM	Order Quantity	Options	List Price	Unit Price		
1	<a href="#">Walk-In Freezer 5ft 10in x 11</a>	SR2000	Each	1.0000		6014.40	6014.40		
2	<a href="#">Walk-In Freezer 7ft 9in x 11ft</a>	SR2010	Each	1.0000	<a href="#">Collect Attributes</a>	6600.00	6600.00		

Enter Product ID or Description - Power Add using Product,Quantity,Units;Product,Quantity,Units format

**Add Product(s)**  
[Search or Browse Catalog](#)
[Get Recommendations](#)

[Get Product Promotions](#)

---

#### Shipping Summary

**Customer** [Johnson Medical Instruments](#)      **Contact**

**Address**

**Shipping Method**       [Advanced Options](#)

---

#### Installation Site

**Site** [San Carlos](#)      **Contact**

**Address** 1985 White Oak Way San Carlos, CA 94070 United States      [Advanced Options](#)

Order - Entry Form page (2 of 3)

**Billing Summary**

Customer [Johnson Medical Instruments](#)      Contact

Address

PO Number

PO Received

---

Invoice      Payment Terms

---

Credit Card      \*Credit Card  [Edit](#)

**Totals**

Description	Amount	Currency
One Time Charges	12,614.40	
Discount	0.00	
Surcharge	0.00	
<b>Total One Time Charges</b>	<b>12,614.40</b>	<b>USD</b>

Order - Entry Form page (3 of 3)

### Credit Rating

Display-only field that is associated with the customer and defaults from the customer data model.

### Customer

When you initially access this page, the Customer, First Name, and Last Name fields are enterable. After you enter or select a customer, the Customer and Contact fields appear.

### Customer

- Enter the name of the customer.
- Click to access the [Company - Summary](#) page to view information about the customer. Order Capture opens a new window to access the Customer Data Model.

You can create a new customer directly from the Entry Form page using the Quick Create functionality. To create a new customer:

1. Enter a customer name.
2. Click Search to access the Search For Sold To Customer page.
3. From the Select Action drop down list, select one of the following:
  - *Create Company*
  - *Create Company With Contact*
  - *Create Company With Site*
  - *Create Consumer*
  - *Create Consumer With Contact*
4. Click Go to access the page that you selected.
5. Populate all fields associated with a customer from on the Quick Create page.
6. Click Save to save the information for the new customer.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “Working with Predefined Business Object Search and Quick Create Data”.

## Contact

The primary Sold To contact defaults here. You can change the contact to any valid Sold To contact associated with this customer for this transaction by selecting from the prompt.

---

**Note.** If the customer is a company, a Sold To contact is required. A consumer does not require a Sold To contact. Orders or quotes that do not have a contact when one is required are automatically placed on Hold.

---



Click the Search for Contact button to access the Search For Contact Of [company] page to view, select, or add contacts for the company.



Click the Show Details button to access the Partners Contact page to view, modify, or add contacts.

## Search Again

Click to access the Search For Sold To Customer page to search for a different customer.

## Partner

This section appears if it is set to be displayed through the display template framework. By default, the Partner section is delivered disabled in the CORE\_ORDER display template for the employee portal (typically where CSRs create and manage orders for customers).

### Company

Enter the name of the partner company for which the order is created.

If you enter a partial company name, click the Search button to find possible matches in the system. Selecting a company may populate the Contact field if the company is associated with one contact.

After a partner company and contact are selected, the Clear button and Search Again link appear.

### Clear

Click to remove values from the Company and Contact fields, which allows you to perform new partner company search.

### Search Again

Click to look for a new partner company and remove all partner information that was entered previously.

## Order Details

This section appears on the Order - Entry Form page and is similar to the Quote Details section on the Quote - Entry Form page.

These fields are applicable to both orders and quotes:

---

**Note.** Some of the fields may not show depending on template settings and additional fields may show based on the template or the product added to the order such as a service or a subscription.

---

### Business Unit

Select a business unit to use for this order or quote.

Based on the tableset control setup, this field may appear as a read only field with one designated business unit, or a drop down list box where users can select a business unit from the list for the order or quote. The system locates the default business unit (by taking the Order Capture unit that is specified

on the User Preferences page for the user who logged on, or by identifying the default business unit that is specified in the Order Capture Definition component if the former is unavailable). If more than one business unit in the system have their RO\_01 (order capture setup tables) record group associated with the same setID as the default business unit, all these business units are then listed in this field. Otherwise, only the default business unit appears in this field and it is not editable.

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

### Status

Displays the status of the order or quote.

The most common statuses are:

- *Open*: the order is still being created.
- *Submitted*: the order has been submitted.
- *On Hold*: there was a problem when the order was submitted.
- *In Fulfillment*: the order is being processed.
- *Complete*: the order is finished (fulfilled).

### Promotion

Select a code that uniquely identifies the promotional offer, if applicable. Products assigned to this promotion will then display a promotional price, rather than their regular price.

---

**Note.** This field involves integration to PeopleSoft Marketing, which relies upon the pricing engine to establish promotional pricing. Under certain circumstances, this field may automatically populate, for instance when an AAF Action that uses a Marketing Wave and Advisor is used to add a product to the order.

---

See *PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook*, “Creating Campaigns and Activities”.

See *PeopleSoft Enterprise CRM Enterprise Pricer 9 PeopleBook*.

### Priority

Priorities appear by default from the Order Capture Business Unit. You can change the priority for the order or quote to *Urgent*, *High*, *Medium*, or *Low*.

---

**Note.** There is no extra processing logic associated with priorities. Priorities may be changed from the Setup Workbench.

---

### Fulfill By

The date can be a left blank or set to a future date. A consumer may want to create a future dated order which is an order that would be queued until the date when the order should be fulfilled. The Fulfill By date will automatically be populated by the order upon submittal if the not filled in.

The Fulfill By date should not be in the past. The order will go on hold. This is not the date when the order was received; this is the date you want the order to be fulfilled.

### Earliest Fulfill By

This field will appear if any of the products on the order has a Lead Time. This field indicates the earliest date the order can be fulfilled.

<b>Show Details or Hide Details</b>	Click to view or hide additional details about the order.
<b>Description</b>	Describe the order.
<b>Source</b>	Identify the source of the order or quote as either <i>CTI</i> , <i>Fax</i> , <i>Phone</i> , <i>Self Service</i> , or <i>Supply Chain</i> .

---

**Note.** Source types may be changed in the Setup Workbench.

---

<b>Accepted</b>	Usually defaulted to the date the order was entered, but can be postdated. For example, you may want to postdate the order because it was faxed prior to today's date.  This date can be in the past.
<b>Currency</b>	Select the currency to use for the order or quote. This defaults based on the business unit.
<b>Total Price</b>	Indicates the total price of the order as it stands with the currently added products and the discounts applied.

## Quote Details

This section appears on the Quote - Entry Form page and is similar to the Order Details section on the Order - Entry Form page. Page elements that appear in both the Quote Details and Order Details sections are described above in the Order Details section of this PeopleBook.

Order Capture displays these additional page elements for quotes:

<b>Quote Date</b>	This date can be a past, present, or future date.
<b>Due Date</b>	Enter the date due for the quote. Due Date can be used if the customer has requested pricing information by a certain date, or if the quote is part of a request for quote (RFQ) that is due by a certain time. A default date may populate this field if specified during business unit setup.
<b>Expire Date</b>	Enter the expiration date for the quote. A default date may populate this field if specified during business unit setup.
<b>Revision</b>	Displays the total number of times the quote has been revised.
<b>Confidence Level %</b>	Order Capture provides this field so that PeopleSoft Sales can populate its relevant data in the quote. The value amount is transferred from an opportunity if populated on the opportunity.

## Line Summary: Products Tab

You can add, remove products, access a catalog, or launch PeopleSoft Advisor to identify a product that suits your customer's specifications. When you create a new quote or order, Order Capture displays the Add Products, Search or Browse Catalog, and Get Recommendations field elements, which we discuss in this section. After you enter a product, Order Capture displays additional fields that also appear on the Order - Line Details page, which we discuss in the Viewing or Modifying Line Details section of this PeopleBook.

See [Chapter 13, "Managing Orders and Quotes," Viewing or Modifying Line Details, page 250.](#)

**Add Product(s)**

Enter the Product ID or a description to search for a product, service, or product package. The system retrieves all the products that you have requested and enters each product on a new line. You can enter more than one product at a time by separating the product IDs or descriptions with semicolons. Be sure to leave no spaces between the IDs or descriptions. This field contains processing logic so that you do not need to enter exact information. Partial matches retrieve the Product Search Results Page, which lists all of the closest matches.

---

**Note.** This field is also equipped with Personalization capability. A CSR's preferences for product selection can be configured so that a variety of input techniques can be used.

---

**Search or Browse Catalog**

Click to view catalogs that are associated with this business unit. You can make selections from available catalogs and compare products or services. You can then add product selections directly to the order form.

**Get Recommendations**

Click to access PeopleSoft Advisor. PeopleSoft Advisor presents you with a question and answer dialog session, where your answers to specific questions will lead to a list of recommendations.

---

**Note.** PeopleSoft Advisor is associated to a data model, so that it can retrieve products. In this case the PeopleSoft CRM product data model, which includes automatic filtering based on the catalog definitions, is the data model that PeopleSoft Advisor uses.

---

After you enter or select a product, Order Capture may display the following buttons:



Click the Upsell button to view an upsell or cross-sell opportunity. The upsell alert appears on the order line if there is an upsell or cross-sell opportunity associated with the product.

**Configure Product**

Click to launch the product PeopleSoft Sales Configurator. When the product is configured, the background button color becomes light blue.

See *PeopleSoft Enterprise Advanced Configurator 9 PeopleBook*.

**Configure Package**

Click to configure and view the components of a dynamic package. The background color changes to light blue after the product has been lightly configured.

---

**Note.** Dynamic packages are supported by the CRM Product Data Model, and exist independently of the PeopleSoft Configurator.

---

**Attributes**

Click to add configurable product attributes to an order or quote line. Always specify the attribute value for products with required attributes.

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

**Add Note**

Click to access the Notes and Attachments page. The cursor is automatically placed on the Summary line so that you can write your note immediately. When a note is attached, the button becomes dotted.



### Get Product Promotions

Select to access the Products Promotions page to view the promotions that are defined in Marketing for the customer.

If the customer only qualifies for one offer, then the order is populated with that offer code. If the customer qualifies for multiple offers, the offer codes are available in a pull-down in the Order so that the user can select the appropriate one.

Additional links are displayed for communications products.

See [Chapter 10, “Using Order Capture and Service Management in the Communications Industry,” page 171](#).

### Line Summary: Pricing Adjustments

Select the Pricing Adjustments tab to enter discounts or surcharges for the product.

#### Discount

A calculated amount of list price minus the unit price is calculated here for quick reference.

#### Promotion Code

Select a Promotion Code for the line. If you add a product to the order line using the Promotion Code, the associated promotion code populates this field.

If an activity is direct/telemarketing with an Order Capture integration, the Offer/Promotion Code of the activity will default to both the Order Details Promotion Code and the Line Detail Pricing Adjustment Promotion Code.

If you have a promotion code, you must use capture level pricing instead of line level pricing.

---

**Note.** This field differs from the field on the Header only in that you can specify a product promotion for a specific line.

---

#### Adjustment

Enter the amount of the adjustment you want to apply to this order line. You can choose to enter either a percentage discount or an actual currency discount. Select *Percent* or *Amount* in the next field to decide whether the number you enter here will be a percentage of the price, or a static currency adjustment.

#### Percent/Amount

Identifies the adjustment field as an exact *Amount* or a *Percentage*.

#### Type

Select *Discount* or *Surcharge*.

#### Apply

Click to apply the discount or surcharge to the order line. The system updates the Total Price and Discount fields.

#### More...

Click to access the Price Adjustments page to view or delete manual adjustments.

See [Chapter 13, “Managing Orders and Quotes,” Viewing or Modifying Line Details, page 250](#).

### Line Summary: Availability Tab

Select the Product Availability tab to return a numerical count of the remaining number of products in stock for those products that you have selected.

#### Check Availability

Click the link to conduct a real-time availability check.

#### Partials

Select to allow partial shipment of the order line.

## Shipping Summary

Use this section to enter shipping information.

See [Chapter 13, “Managing Orders and Quotes,” Entering Shipping, Payment, and Billing Information, page 257.](#)

## Installation Site

This section appears if one of these conditions is met:

- Any product added to this order has the Site Required option selected on the Installed Product page of its product definition
- The *NOSITE* hold is enabled for this capture type (for example, order, quote, or service management) and business unit combination.

Hold processing is defined using the Capture Type Workbench. For each setID that is used by the order capture applications, you specify, per capture type, a list of hold validations that the system fires when CSRs submit forms of that capture type. For example, if this hold is enabled for the *SHARE* setID and the *order* capture type, for any order of which its business unit is associated with this setID, the system performs a check and places a hold on the order if a site is missing at time of submission.

By default, the *NOSITE* hold is disabled in system delivered setIDs.



Click the Select Site button to select the site and address or to add a site address. After you select a site, Order Capture displays the site name, which you can then click on to access the Site page in the Customer Data Model.

---

**Note.** This button appears only when a product requires one, as defined in the product data model or if the *No Site Hold* option is active.

---

See *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, “Tracking Installed Products and Assets,” Defining Creation and Update Rules for Installed Products.

### Contact

Select a site contact for the customer.

---

**Note.** Select *Add/Select More Contacts* to access the Address Book - Select Contact page to select or add a contact.

Contact displays only when a product requires one, as defined in the product data model or if the *No Site Hold* option is active.

---

### Address

The primary address associated with the site appears here.

---

**Note.** Address displays only when a product requires one, as defined in the product data model or if the *No Site Hold* option is active.

---

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

### Advanced Options

Click to view the Lines for this Destination section under the Advanced Shipping section.

Both the Shipping Summary and Installation Site (if available) sections are combined and renamed the Advanced Shipping section. CSRs choose to work with the advanced mode of the form typically when there is a need to split shipments, in which case the installation sites would likely to be different for each shipment.

The Lines for this Destination section shows all products tied to the shipment. You can split a shipment so that certain lines are:

- Shipped to a different address.
- Shipped using a different shipping method.
- Assigned to a different site.
- Assigned a different requested date.

---

**Note.** You cannot split the quantity on a single line into multiple shipments. You must create two lines with the appropriate quantity so that you can specify a unique shipping address, shipping method, and date for each shipment.

---

See [Chapter 13, “Managing Orders and Quotes,” Entering Shipping, Payment, and Billing Information, page 257.](#)

## Billing Summary

Use this section to manage payment information.

See [Chapter 13, “Managing Orders and Quotes,” Entering Shipping, Payment, and Billing Information, page 257.](#)

## Totals

<b>One Time Charges</b>	As opposed to recurring charges, these charges indicate charges that occur only once.
<b>Recurring Charges</b>	As opposed to one-time charges, these charges indicate charges that occur with varying frequency, such as weekly, monthly, or annually.
<b>Discount</b>	Order-level adjustments from the Pricing Adjustments page appear here.
<b>Taxes and VAT</b>	Order Capture integrates with Taxware, Vertex, and WorldTax to calculate VAT and other taxes. You must have already defined your tax integration options for Order Capture on the Business Unit definition page and tax provider page.

---

**Note.** To display VAT, you must define World Tax as your Tax Vendor when you created your Order Capture business unit. You can test all of your third party integrations on the business unit definition page.

---

**Update Total** Click to manually invoke the pricing engine and any third party calculations such as VAT, taxes, and shipping, and update the total amount charged to this order or quote. This is then reflected in Total One Time Charges.

## See Also

*PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “Defining Tax Exempt Certificate Information for Companies, Consumers and Sites”

## Getting Product Recommendations

Access the Product Advisor List page.

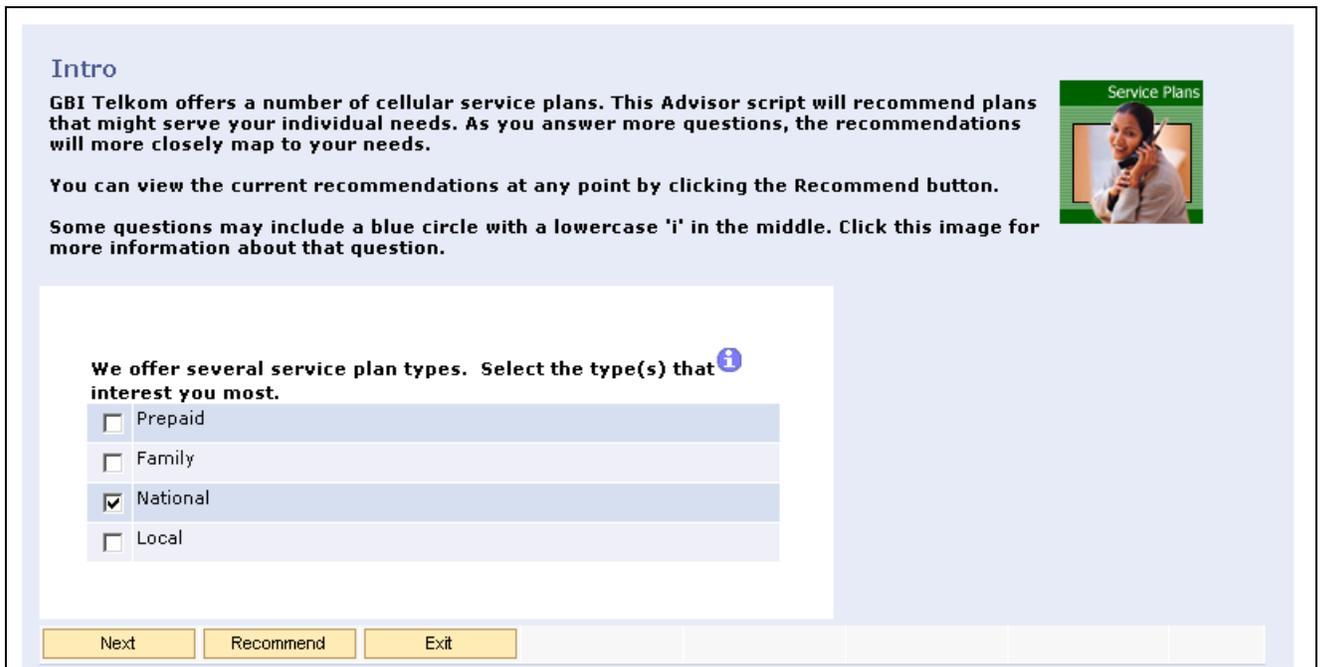


Product Advisor List page

You can leverage PeopleSoft Real-Time Advisor to engage the buyer with questions and return recommendations. When you click the Get Recommendations link, it launches a question and answer dialog session. When you click the Get Recommendations link, the system displays the Product Advisor List page that lists catalogs with a Real-Time Advisor Dialog associated with it. Select a catalog and Order Capture displays the first page in the dialog.

## Starting a PeopleSoft Real-Time Advisor Dialog

Access the PeopleSoft Real-Time Advisor Intro page.



PeopleSoft Real-Time Advisor Intro page

The dialog is a series of pages that contain questions and answers. Answers do not provide a static response from PeopleSoft Real-Time Advisor. Instead, the buyers responses determine the user segment that they are placed in, as well as the predefined weightings that are applied. If you choose to walk the buyer through the dialog, a recommendation for a product, service, or solution will be presented at the end of the dialog. You can also force a recommendation by clicking the Recommend button.

Click Exit to return to the calling application, which in this case is Order Capture.

**Note.** Displaying the debug information is an optional feature of the Real-Time Advisor Dialog. To turn the debug information off, refer to the Advisor Workbench documentation in the PeopleSoft Advisor PeopleBook. There is a Business Unit setting that can enable the debug information to show during the Advisor run.

**See Also**

*PeopleSoft Enterprise Real-Time Advisor CRM 9 PeopleBook*, “Setting Up Real-Time Advisor Dialogs”

*PeopleSoft Enterprise Real-Time Advisor CRM 9 PeopleBook*, “Defining Display Templates”

## Viewing or Modifying Line Details

Access the Order - Line Details page.

**Order**

Submit Save Validate Convert To Bulk Add Search Cancel 360 360-Degree View Personalize

**Order ID** New  
**Customer** Alliance Group  
**Contact** Paula Smith  
**Order Status** New Order  
**Customer Value** Gold★★★★★  
**Credit Rating** 0

Entry Form **Line Details** Holds Notes Related Actions History

Go To Select One...

**Line Details** Find View All First 1 of 2 Last

<b>Product</b> Men's Long Sleeve	<b>Line</b> 1	<b>Total Price</b>	20.00
Bike Jersey	<a href="#">Add Note</a>	<b>Total Recurring Price</b>	0.00
<b>Product ID</b> 10000		<b>List Price</b>	20.00
<b>*Unit of Measure</b> Each		<b>Discount Taken</b>	0.00
<b>Order Qty</b> 1.0000	<a href="#">Availability Check Failed</a>	<b>Discount Percentage</b>	0.00
<b>Unit Price</b> 20.00	<a href="#">View Adjustments</a>	<b>Minimum Price</b>	0.00
<b>Promotion Code</b>			
<b>Shipment</b> Single Shipment			

Order - Line Details page (1 of 2)

**Manual Price Adjustments**

Adjustment  Pct/Amt  Adjustment Type

Replace/Cascade  Adjustment Target

**Cross/Up Sell Opportunities**

		Product Description	Product ID	Relationship Description
		Long Sleeve T-Shirt, Men's	10002	Agreements
		Long Sleeve T-Shirt, Men's	10002	Alternates
		Long Sleeve T-Shirt, Men's	10002	Up-Sells
		Women's Long Sleeve Bike Shirt	10003	Agreements
		Long Sleeve T-Shirt, Women's	10004	Alternates
		Supplex Shorts, Men's	10006	Cross-Sells
		Sidepocket Short's, Women's	10007	Cross-Sells

**Configuration and Attributes**

Men's Long Sleeve Bike Jersey 1@ 20.00/EA

[Top of Page](#)

Order - Line Details page (2 of 2)

## Line Details

### Check Availability

Click to return an exact numerical count of the remaining number of products in stock.

---

**Note.** Order Capture uses the SCM\_PROD\_AVAIL integration point to make a call to PeopleSoft Supply Chain Management to determine product availability. PeopleSoft Supply Chain Management returns an exact numerical count of available products. If you are using a third party product for order fulfillment, you can use this integration point. It provides the ability to transform the integration point message to the appropriate format using the PeopleTools Integration broker. An “Availability Not Available,” message next to the *Order Qty* field indicates an inactive integration to a third party inventory system.

---

### View Adjustments

Click on this link to view any price adjustments that have been applied to the order line.

### Shipment

Select *Single Shipment* to allow or not allow partial shipments.  
 Select *Ship as Items Available* to allow partial shipments.

## Manual Price Adjustments

### Adjustment

Enter the amount of the adjustment you want to apply to this order line. You can choose to enter either a percentage discount or an actual currency discount. Select *Percent* or *Amount* in the next field to decide whether the number you enter here will be a percentage of the price, or a static currency adjustment.

### Pct/Amt (percent/amount)

Identifies the adjustment field as an exact *Amount* or a *Percentage*.

### Adjustment Type

Select *Discount* or *Surcharge*.

<b>Replace/Cascade</b>	<i>Cascade Manual Adjustment</i> adds this price adjustment to all existing adjustments, whereas <i>Replace Manual Adjustments</i> replaces any manual adjustments with the current discount being applied.
<b>Adjustment Target</b>	You can target the discount for the current line that you are looking at, in which case you select <i>Apply to this order line</i> , or you can apply the discount to the whole order, by choosing <i>Apply to entire order</i> .
<b>Apply Adjustment</b>	Click to apply the discount or surcharge to the order line. The system updates the Total Price and Discount fields.

## Configuration & Attributes

This grid provides a detailed list of the options chosen upon configuring a product on this order. Configuration details appear in a list under the Configurator button and product name. Other elements can also appear based on previously established setup parameters.

If a product is defined in the product data model as requiring configurable attributes, an icon appears at the point of order entry. This navigates the user through attribute capture. This icon also appears on this page along with the product name. You can also view the attribute and attribute values captured for the order.

---

**Note.** You can control the level of detail that displays here. To control display options, you can navigate to Schemas-Display options in the Configurator setup.

---

## See Also

*PeopleSoft Enterprise Advanced Configurator 9 PeopleBook*

## Creating Service Agreements

Access the Order - Line Details page.

**Order**

[Submit](#) [Save](#) [Validate](#) [Convert To Bulk](#) [Add](#) [Search](#) [Cancel](#) [360-Degree View](#) [Personalize](#)

**Order ID** [New](#) **Order Status** [New Order](#)  
**Customer** [Apex Systems](#) **Customer Value** [Gold★★★★](#)  
**Contact** [Mary Lewis](#) **Credit Rating** [0](#)

[Entry Form](#) **[Line Details](#)** [Holds](#) [Notes](#) [Related Actions](#) [History](#)

Go To [Select One...](#)

**Line Details** [Find](#) | [View All](#) First 2 of 2 Last

<b>Product</b>	AGRFORIUT01	<b>Line</b>	2	<b>Total Price</b>	232.00
<b>Product ID</b>	AGRFORIUT01	<a href="#">Add Note</a>		<b>Total Recurring Price</b>	0.00
<b>Unit of Measure</b>	Each	<b>List Price</b>		<b>List Price</b>	232.00
<b>Order Qty</b>	1.0000	<b>Discount Taken</b>		<b>Discount Taken</b>	0.00
<b>Unit Price</b>	232.00 <a href="#">View Adjustments</a>	<b>Discount Percentage</b>		<b>Discount Percentage</b>	0.00
<b>Promotion Code</b>	<input type="text"/>	<b>Minimum Price</b>		<b>Minimum Price</b>	0.00
<b>Agreement Code</b>	NEXT	<b>Duration</b>		<b>Duration</b>	1 Years
<b>Shipment</b>	Single Shipment				
<b>Start Date</b>	06/04/2004	<b>End Date</b>	06/03/2005		

Order - Line Details page (1 of 2)

**Select Covered Products**

Include in Agreement	Line Number	Product Description	Product ID	Unit of Measure	Quantity	Installed Product
<input checked="" type="checkbox"/>	1	Desktop CPU 450Mhz, 128 Mb RAM	IUT-01	Each	1.0000	N
<input type="checkbox"/>	3	Desktop CPU 450Mhz, 128 Mb RAM	IUT-01	Each	1.0000	N
<input checked="" type="checkbox"/>	4	Desktop CPU 450Mhz, 128 Mb RAM	IUT-01	Each	1.0000	N

Add Additional Products To Agreement

[Include Customer's Installed Products](#) [Create Installed Product](#)

**Manual Price Adjustments**

**Adjustment**  **Pct/Amt** [Percent](#) **Adjustment Type** [Discount](#)  
**Replace/Cascade** [Replace Manual Adjustments](#) **Adjustment Target** [Apply to this order line](#)  
[Apply Adjustment](#)

**Configuration and Attributes**

[Submit](#) [Save](#) [Validate](#) [Convert To Bulk](#) [Add](#) [Search](#) [Cancel](#) [360-Degree View](#) [Top of Page](#)

Order - Line Details page (2 of 2)

Service agreements, such as installation services, maintenance services, and support services provide an opportunity for increased profits, and Order Capture enables you to sell both products and services together.

Using a Service Agreement product type, Order Capture enables you to purchase agreement products. Additionally, a product relationship type of Agreements enables you to upsell agreement products with standard products.

## Select Covered Products

- Include in Agreement**                      Select to associate multiple ordered products to one service agreement.

If multiple products on the order are eligible for coverage by the same service agreement product, based on the agreement template definition, Order Capture displays them in the Select Covered Products grid. If selected, Order Capture includes them in the coverage and cost of the purchased agreement.
- Include Customer’s Installed Products**                      Click to access the Customer’s Installed Products page to select installed products to provide coverage for on the order. If the customer has any installed products eligible for coverage by the agreement product, Order Capture displays them in the Selected Covered Products grid.
- Create Installed Product**                      Click to access the Installed Product page to create an installed product to add to the Select Covered Products grid.

By default, when purchasing an agreement product through order capture, a new agreement will be created. This is indicated by the value of *NEXT* defaulted into the Agreement Code field.

If instead, you would like to provide coverage against an existing agreement for this customer, one may be selected from the order line details page, by choosing the selection icon on the Agreement Code field.

## Creating Configurations

This section discusses how to:

- Configure a product using PeopleSoft Configurator.
- Configure a dynamic package.

### Pages Used to Create Configurations

Page Name	Object Name	Navigation	Usage
Configure Product	CFG_HTML_SEC	Orders and Quotes, Add Order (or Add Quote)  After adding a configured product, click the Configure Product button next to the order quantity.	Fully configure the product using PeopleSoft Configurator.
Dynamic Package	CP_DYNAMIC_PANEL	Orders and Quotes, Add Order (or Add Quote)  Click the Dynamic Package button next to the order quantity for a product.	Create a dynamic package from within Order Capture.

### Configuring a Product Using PeopleSoft Configurator

Access the Configure Product page.

List Price \$8,240.00

**\*What will this freezer be used for?**  
 Food Stuffs  
 Ice Blocks  
 Medical Supplies

**\*Refrigerator Type**  
 Cooler (max. +35F)  
 Freezer (max. -10F)

**\*Refrigerator Dimensions**  
Height:   
Width:   
Depth:

**Openings per Hour**

**\*Cooling Unit**  
 Cooler w/ Hermetic Compressor [+ \$4,500.00]  
 Cooler w/ Semi-Hermetic Compressor

**\*Wall Color**

Configure Product page (1 of 2)

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Configure Product page (2 of 2)

The process for ordering configured products using Order Capture is similar to the process for ordering standard products, with one exception. After you enter the order line on the Entry Form page, you must configure the product by clicking the Configure Product or Reconfigure Product link (or button) and selecting the desired options for that configured product on the Configuration page.

**Cancel Changes** Click this button to cancel this configuration session and return to the order Entry Form in Order Capture.

**Return to Order** Click this button to submit this configuration session and return to the Entry Form in Order Capture.

---

**Note.** The configuration display pages can vary widely depending upon how these pages were created.

---

See [Chapter 7, “Integrating Product Configuration,” Working with PeopleSoft Advanced Configurator, page 106.](#)

## Configuring a Dynamic Package

Access the Dynamic Package page.

PRODUCT	QUANTITY	PRICE
<b>Camping Package</b> <small>*Select from 3 to 6 Components.</small>	1 Each	1000.00 USD
<input checked="" type="checkbox"/> <b>4 Season Convertible Tent</b>	1 Each	
<input checked="" type="checkbox"/> <b>Ice Chest, 20 Qt.</b> <small>*Enter a Quantity from 1 to 2.</small>	<input type="text" value="1"/> Each	
<input checked="" type="checkbox"/> <b>Air Bed with Pump</b>	1 Each	
<input checked="" type="checkbox"/> <b>Adult Day Pack</b> <small>*Enter a Quantity from 0 to 1.</small>	<input type="text" value="1"/> Each	
<input checked="" type="checkbox"/> <b>Culinary Package</b>	1 Each	
<input checked="" type="checkbox"/> <b>Single Outdoor Cooker</b>	1 Each	
<input checked="" type="checkbox"/> <b>BackPacker Cook Set, 2 Person</b>	1 Each	
<input checked="" type="checkbox"/> <b>Aluminum Pots/Pans</b>	1 Each	
<input checked="" type="checkbox"/> <b>Titanium Fork/Spoon Set</b>	1 Each	

Dynamic Package page

## Entering Shipping, Payment, and Billing Information

This section discusses how to:

- Enter shipping information.
- Manage billing information.

## Pages Used to Enter Shipping, Payment, and Billing Information

Page Name	Object Name	Navigation	Usage
Order - Entry Form (Advanced Shipping grid), Quote - Entry Form (Advanced Shipping grid)	RO_FORM	<ul style="list-style-type: none"> <li>Orders and Quotes, Add Order Click the Advanced Option link in the Advanced Shipping grid.</li> <li>Orders and Quotes, Add Quote Click the Advanced Option link in the Advanced Shipping grid.</li> </ul>	Enter shipping information.
Order - Entry Form (Billing Summary grid), Quote - Entry Form (Billing Summary grid)	RO_FORM	<ul style="list-style-type: none"> <li>Orders and Quotes, Add Order</li> <li>Orders and Quotes, Add Quote</li> </ul>	Manage payment information and add a new billing account, if applicable.
Order - [mode] Credit Card	RO_CREDITCARD_SEC	Click the Edit link on the Order - Entry Form page in the Billing Summary section.	Add or edit credit card information for billing purposes.

## Entering Shipping Information

Access the Order - Entry Form page: Advanced Shipping grid.

**Advanced Shipping**

Customer [Johnson Medical Instruments](#)      Contact:

Address:

Shipping Method:       Arrival Date:

Description:

Tax Exempt

---

Site [San Carlos](#)      Contact:

Address: 1985 White Oak Way San Carlos, CA 94070 United States

**Lines for this Destination**

Select	Line	Product Description	Product ID	Unit of Measure	Order Quantity	Site Required
<input type="checkbox"/>	1	<a href="#">Walk-In Freezer 5ft 10in x 11</a>	SR2000	Each	1.0000	Y
<input type="checkbox"/>	2	<a href="#">Walk-In Freezer 7ft 9in x11ft</a>	SR2010	Each	1.0000	Y

[Basic Options](#)

Order - Entry Form page: Advanced Shipping grid

Clicking the Advanced Options link combines the Shipping Summary and Installation Site sections to become the Advanced Shipping section. CSRs choose to work with the advanced mode of the form typically when there is a need to split shipments, in which case the installation sites would likely to be different for each shipment.

If the Installation Site section is not displayed in the basic mode, it'll be hidden in the advanced mode as well.

<b>Customer</b>	Displays the customer who the order will be shipped to. Click to access the Company page in the Customer Data Model.
	Click the Lookup Customer button to select a different ship to customer.
<b>Contact</b>	Select a shipping contact for the customer.
	<hr/> <b>Note.</b> Select <i>Add/Select More Contacts</i> to access the Address Book - Select Contact page to select or add a contact. When adding a new contact, you can indicate the new contact as a one-time contact by checking the "One Use Only (not a permanent address or contact)" on the Address Book - Create New Address page. <hr/>
<b>Address</b>	Select a shipping address for the customer.
	<hr/> <b>Note.</b> Select <i>Add/Select More Addresses</i> or click the View Addresses button to access the Address Book - Select Address page to select or add a shipping address. When adding a new address, you can indicate the new address as a one-time address by selecting One Use Only (not a permanent address or contact) on the Address Book - Create New Address page. <hr/>
<b>Shipping Method</b>	Select a carrier service. Applicable carriers that are to be used by the system are set up in the CARRIER_TBL.
	See <a href="#">Chapter 4, "Setting Up PeopleSoft Order Capture," Setting Up Freight Integration, page 71.</a>
<b>Arrival Date</b>	Select the requested arrival date for the product(s) being shipped. If the order is a future dated order, the shipping Arrival Date must be after the Fulfill By date, otherwise the order will go on hold.
<b>Description</b>	Enter any additional information about the shipment.
<b>Tax Exempt</b>	Select if the shipment is exempt from taxes. If selected, Order Capture displays the Exemption Certificate field where you select a tax exemption certificate.
	Click the Select Site button to select the site and address or to add a site address. After you select a site, Order Capture displays the site name, which you can then click on to access the Site page in the Customer Data Model.
	<hr/> <b>Note.</b> Select Site appears only when a product requires one, as defined in the product data model or if the <i>No Site Hold</i> option is active. <hr/>
	See <i>PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook</i> , "Tracking Installed Products and Assets," Defining Creation and Update Rules for Installed Products.
<b>Contact</b>	Select a site contact for the customer.
	<hr/> <b>Note.</b> Select <i>Add/Select More Contacts</i> to access the Address Book - Select Contact page to select or add a contact. <hr/>
	Contact displays only when a product requires one, as defined in the product data model or if the No Site Hold option is active. <hr/>

**Address** The primary address associated with the site appears here.

---

**Note.** Address displays only when a product requires one, as defined in the product data model or if the No Site Hold option is active.

---

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

### Lines for this Destination

This section shows all products tied to the shipment. You can split a shipment so that certain lines are:

- Shipped to a different address.
- Shipped using a different shipping method.
- Assigned to a different site.
- Assigned a different requested date.

---

**Note.** You cannot split the quantity on a single line into multiple shipments. You must create two lines with the appropriate quantity so that you can specify a unique shipping address, shipping method, and date for each shipment.

---

**Split** Select a line to split the order into multiple shipment.

**Move to Another Shipment** After you select a line, click to split a line to create multiple shipments.

**Combine with Previous Shipment** Click to combine the shipment with the previous shipment. This button appears after you split a shipment

**Basic Options or Advanced Options** Click to view or hide details about the shipment.

## Managing Billing Information

Access the Order - Entry Form page: Billing Summary grid.



The screenshot shows a 'Billing Summary' form with the following elements:

- Customer:** Alliance Group (with a search icon)
- Address:** 14410 Union Ave San Jose, CA (with a location pin icon)
- Contact:** Paula Smith (dropdown menu)
- PO Number:** (text input field)
- PO Received:**
- Invoice:**  (selected)
- Credit Card:**
- Payment Terms:** (dropdown menu)
- \*Credit Card:** \*No Cards Defined\* (dropdown menu with an [Edit](#) link)

Order - Entry Form page: Billing Summary grid

**Bill To** Select where the ordered products are to be billed, to the partner or the customer.

---

**Note.** This field appears if the Partner Commerce products is installed and a partner company is selected for the order.

---

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

**Products are for Resell**

Select to indicate that ordered products are for resell purposes.

This option is used in several order capture EIPs, as well as in some of the holds in the application to drive business logic (for example, if the products are for resell, the check on the presence of an installation site on the order entry form may not be necessary at save time.)

---

**Note.** This field appears if the Partner Commerce products is installed and a partner company is selected for the order.

---

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

**Customer**

Displays the customer who the order will be billed to. Click to access the Company page in the Customer Data Model.



Click the Lookup Customer button to select a different bill to customer.

**Contact**

Select a billing contact for the customer.

---

**Note.** Select *Add/Select More Contacts* to access the Address Book - Select Contact page to select or add a contact. When adding a new contact, you can indicate the new contact as a one-time contact by checking the "One Use Only (not a permanent address or contact)" on the Address Book - Create New Address page.

---

**Address**

Select a billing address for the customer.

---

**Note.** Select *Add/Select More Addresses* or click the View Addresses button to access the Address Book - Select Address page to select or add a billing address. When adding a new address, you can indicate the new address as a one-time address by checking the "One Use Only (not a permanent address or contact)" on the Address Book - Create New Address page.

---

**PO Number**

Enter the Purchase Order number, if one exists for the customer.

**PO Received**

Select this check box if a Purchase Order has been received.

---

**Note.** This functionality is designed solely for auditing purposes. There is no attached business logic.

---

**Invoice**

Select to issue an invoice to the customer.

**Payment Terms**

Select terms of payment if *Invoice* is selected as the payment method.

**Credit Card (option)**

Select this option to charge the customer using a credit card.

Select a credit card if *Credit Card* is the payment method.

**Credit Card** (drop down list) Select an existing credit card from the drop down list or add a new credit card.

---

**Note.** The credit card is attached to the bill to contact or consumer in the customer data model.

---

**Edit** Click to access the Order - [mode] Credit Card page to add or edit credit card information for the customer.

---

**Note.** When you add or edit credit card information, you have the option to save the information in the Customer Data Model or not.

---

## Billing Account

The Billing Account section appears if the Use Accounts flag on the Order Capture Business Unit is selected. Accounts are mainly used for recurring charges and are utilized extensively for communications.

When a new Billing Account is created through the Order Capture business process, the *BillTo* customer is added to the billing account with a *Manager* role.

You can use an existing account for the order entry, or create a new one, if required for order processing.

**Existing Account** Select to refer this Order Capture payment to an existing service account.

**Account Number** Enter an existing service account number.

**New Account** Select to create a new service account, then select the type of account, either *individual*, *sponsored*, *subordinate* or *prepaid*.

**Individual Account** Select to create a new account that is unrelated to other accounts.

**Invoice** Select *invoice* as the payment method.

**New Credit Card** Select an existing credit card or add a new credit card.

---

**Note.** The credit card is attached to the bill to contact or consumer in the customer data model.

---

**Sponsored Account** Select if there is a parent account that assumes billing responsibility for this new account. Choose the parent account ID in *Sponsoring Acct No.*

**Subordinate Account** Select if there is a parent account that assumes billing responsibility for this new account. Choose the parent account ID in *Parent Account No.*

**Prepaid Account** Only available when a prepaid service product has been added to the order. This option will create a prepaid account which means funds need to be added to the account before the service is available for use.

See *PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook*, "Understanding Prepaid Accounts for Communication Service Providers".

# Viewing Price Adjustments

This section discusses how to view price adjustment details.

## Page Used to View Price Adjustments

Page Name	Object Name	Navigation	Usage
Price Adjustments	RO_CAPTURELINE_ADJ	<ul style="list-style-type: none"> <li>Orders and Quotes, Add Order</li> <li>Click the Line Details tab, then click on the View Adjustments link.</li> </ul>	View details of the price changes that you made. You can view the pricing details for Line Adjustments, Summed and Manual Adjustments, and Order Adjustments.

## Viewing Price Adjustment Details

Access the Price Adjustments page.

The screenshot shows the 'Price Adjustments' page for Product ID USA-02 with a List Price of 250.00. The page is divided into several sections:

- Product Information:** Product ID USA-02, Unit of Measure Each, List Price 250.00.
- Line Adjustments:** A tabbed interface with 'Rule', 'Formula', and 'Pricing Keys' tabs. Below the tabs is a table with columns: Price Rule, Description, Price Action Type, Adjustment Method, Adjustment, Adjustment Type, and Price.
- Summed and Manual Adjustments:** A table with columns: Description, Adjustment, Type, and Price. It shows a 'Manual Adjustment' of -10.0000 Percent resulting in a price of 225.00.
- Order Adjustments:** A tabbed interface with 'Rule', 'Formula', and 'Pricing Keys' tabs. Below the tabs is a table with columns: Price Rule, Description, Price Action Type, Adjustment, and Adjustment Type.

At the bottom of the page, there are 'OK' and 'Cancel' buttons.

Price Adjustments page

### Line Adjustments - Rule Tab

This grid displays all of the adjustments applied by the system, including the price rules that are being applied to the lines.

### Line Adjustments - Formula Tab

Information on this tab provides more detail about the rules that are being applied.

### Line Adjustments - Pricing Keys Tab

Information on this tab lists the identifiers which indicate where the Price Rule condition was met.

### Summed and Manual Adjustments

This grid displays the summed and manual adjustments that were applied to the lines.

### Order Adjustments

This grid displays the price adjustments that have been applied for the total order.

## Adding and Viewing Notes and Attachments

This section discusses how to add or view notes and attachments.

### See Also

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

### Pages Used to Add or View Notes and Attachments

Page Name	Object Name	Navigation	Usage
Order - Notes, Quote - Notes	RO_NOTE	<ul style="list-style-type: none"> <li>Orders and Quotes, Add Order, Notes</li> <li>Orders and Quotes, Add Quote, Notes</li> </ul>	Add or review notes or attachments for the order or quote.

## Adding or Viewing Notes or Attachments

Access the Order - Notes page.

The screenshot displays the 'Order - Notes' page. At the top, there are navigation buttons: Submit, Save, Validate, Convert To Bulk, Add, Search, Cancel, 360-Degree View, and Personalize. Below these, order information is shown: Order ID New, Customer Alliance Group, Contact Paula Smith, Order Status New Order, Customer Value Gold (3 stars), and Credit Rating 0. A breadcrumb trail includes Entry Form, Line Details, Holds, Notes (selected), Related Actions, and History. A 'Go To' dropdown menu is set to 'Select One...'. The main section is titled 'Notes Summary' and contains a table with the following data:

Select	Subject and Details	Attachment(s)	Related Line	Visibility	Added By	Date Added	
<input type="checkbox"/>	<a href="#">Order on Hold: Explanation Provided</a>			Internal Only	Stu Marx	06/07/2004 2:26PM	
<input type="checkbox"/>	This order was placed on hold until we obtain customer's address.			Internal Only	Stu Marx	06/07/2004 2:26PM	

Below the table, there are buttons for 'Select All / Clear All' and 'Add Note'.

Order - Notes page (1 of 2)

**Note Details**

**Added On** 06/07/2004 2:26PM Stu Marx

**\* Summary** Order on Hold: Explanation Provided

**Details** Wait until customer is off the credit hold report.

**Note Type**

**\* Visibility** Internal Only

**Note Origin** Internal

**Related Line**

**Attachments** Customize | Find | 1 of 1 | Last

Attachment	Description	Visibility	Added By	Date Added
<a href="#">Telephone List.doc</a>	Contacts		Stu Marx	06/07/2004 2:26PM

[Top of Page](#)

Order - Notes page (2 of 2)

## Notes Summary

This section displays a summary of notes.

**Subject and Details** Displays a short and long description of the note contents.

**Add Note** Click to add a note for the order.

## Add a Note or Note Details

**Note Type** Select either *Billing Notes*, *Comment*, *Customer Call*, *Customer Web*, *Pricing Note*, *Production Configuration*, *Research*, *Sales Note* or *Shipping Notes* as the type of note.

**Visibility** Select *Everywhere* or *Internal Only*. If you select *Everywhere*, users of all self service applications, including Order Capture Self Service will be able to view the note. If you select *Internal Only*, notes will only be viewable to the CSR.

## Attachments

**Attachment** Click to view an existing attachment.

**Apply Note** After entering information, click to apply the note to the order or order line or to the quote or quote line.

**Add an Attachment** Click to add an attachment. Order Capture opens a new page for you to browse the network to locate and attach a file to the note.

---

## Managing Holds

This section provides an overview of holds and discusses how to view the hold summary.

---

**Note.** Additional holds are available for the communications industry, Service Management orders, and Bulk Orders.

---

See [Chapter 10, “Using Order Capture and Service Management in the Communications Industry,” page 171](#).

## Understanding Holds

Hold validations fire automatically as soon as you submit an order or quote. You can access the Holds page to see if an order has been put on hold. If there is a hold on the order or quote, Status changes to Hold Order. If there is no hold, a "Currently No Holds" message is viewable. There are a variety of reasons as to why your order or quote will be placed on hold. There are also several ways in which you can resolve the problem.

The following table identifies some of the holds in Order Capture:

Hold Code	Explanation
Anonymous Customer Hold	Hold is triggered if the customer specified is setup as an anonymous Business Object. Use this hold when the fulfillment system does not support anonymous Customers.
Configuration Hold	Hold is triggered if a line has a configured product and it is not configured when capture is submitted.
Exceed Corporate Credit Limit	Hold is triggered if the customer has exceeded the credit limit range as specified on the Customer and Business Unit.
Credit Card Hold	Hold is triggered if the customer is paying by credit card, and the authorization fails.
Currency Conversion Not Possible	Hold is triggered if there is no currency conversion available for the pricing engine.
Exceeds Maximum Order Qty	Hold is triggered if the quantity on the line exceeds the maximum order quantity.
Under Minimum Quantity	Hold is triggered if the quantity on the line falls below the minimum order quantity.
Below Minimum Selling Price	Hold is triggered if the quantity on the line falls below the minimum selling price.
No Bill To Contact	Hold is triggered if the bill to contact is missing.
No Bill To Customer	Hold is triggered if the bill to customer is missing.

Hold Code	Explanation
No Product Package Components	Hold is triggered if the line has a product that is a package, and no package components have been chosen.
No Capture Lines	Hold is triggered if the order or quote has no lines.
No Ship To Customer	Hold is triggered if the ship to customer is missing.
No Ship To Contact	Hold is triggered if the ship to contact is missing.
No Sold To Contact	Hold is triggered if the sold to contact is missing.
Product Catalog Violation	Hold is triggered if the product on the line is not in the customer's catalog.
Product Increment Violation	Hold is triggered if the line quantity is not a multiple of the increment defined on the product definition.
Product Prerequisite Violation	Hold is triggered if the product on the line has prerequisites that are not installed, or not on the current capture.
Price List Not Found	Hold is triggered if there is no price list found by the pricing engine.
Line Site Contact Required	Hold is triggered if a product requires a site, and a Site Contact is not one specified.
Line Site Required	Hold is triggered if a product requires a site, and there is not one specified.
Freight Calculation Hold	Hold is triggered if the calculation of freight charges by the third-party system fails.
Invalid Start / End Dates Hold	Hold is triggered when the start date or end date is missing or invalid for service products.
Subscription Holds	Subscription Holds ensure valid order data for a Subscription. Order Due date is set and is today or in the future, Subscription Term and Schedule are set.
Future Dated Orders not enabled Hold	Hold is triggered if a Fulfill By date is set and Future Dated Orders are not enabled on the Business Unit.

Hold Code	Explanation
Order Re-Validation Failed	Hold is triggered if order fails revalidation on order execution date during the submit attempt. This may occur if the products on the order are no longer active.
Fulfill By date is before Earliest Fulfill By date	Hold is triggered if the order execution date is before the earliest date the order can be fulfilled. The Earliest Fulfill By date calculated based on the Lead times of the products on the order.
Shipment Arrival Date Earlier then Order Due Date	Hold is triggered if user specified the shipment arrival date prior to the order due date. The shipment may arrive late.
Order Execution Time Frames Overlapping	Hold is triggered if the estimated order execution time frame (the period of time between order execution and order due dates) is overlapping with the same period for another already queued order.
Service Disconnection Scheduled before Order Due Date	Hold is triggered if the submitted manage service order is due for a date when the service is already scheduled to be disconnected (already queued disconnection order; temporarily activated service) or there are other queued Manage Service orders due for a date later then the due date of the currently submitted Disconnect Service order.
Service Suspend scheduled before Order Due Date	Hold is triggered if the submitted manage service order is due for a date when the service is already scheduled to be suspended (already queued suspend service order) or there are other queued Manage Service orders due for a date later then the due date of the currently submitted Suspend Service order.

---

**Note.** Holds can be easily added for specific business processing. You can extend hold processing by creating your own hold codes. This is a simple configuration task in the Order Capture Setup and Capture Type workbenches.

---

See [Chapter 4, “Setting Up PeopleSoft Order Capture,” Defining Hold Codes, page 40.](#)

See [Chapter 4, “Setting Up PeopleSoft Order Capture,” Defining Hold Processing, page 55.](#)

## Pages Used to Manage Holds

Page Name	Object Name	Navigation	Usage
Order - Holds (Hold Summary grid), Quote - Holds (Hold Summary grid)	RO_HOLD	<ul style="list-style-type: none"> <li>Orders and Quotes, Add Quote, Holds</li> <li>Orders and Quotes, Add Order, Holds</li> </ul>	View holds on the order or quote.
Order - Holds (Hold Details grid), Quote - Holds (Hold Details grid)	RO_HOLD	<ul style="list-style-type: none"> <li>Orders and Quotes, Add Quote, Holds</li> <li>Click the Hold Details link.</li> <li>Orders and Quotes, Add Order, Holds</li> <li>Click the Hold Details link.</li> </ul>	View hold details and override the hold, if necessary.

## Viewing the Hold Summary

Access the Quote - Holds page: Hold Summary grid.

The screenshot displays the Oracle Quote - Holds page. At the top, there are navigation buttons: Submit, Save, Validate, Return to Search, Next, Previous, Clone, Add, Search, and Personalize. Below these, the Quote ID is QUO0025, Customer Contact is Western Pacific Wholesaler (Bob Johnson), Quote Status is Hold Quote, Customer Value is Gold (★★★★★), and Credit Rating is 0. The page has tabs for Entry Form, Line Details, Holds, Notes, Related Actions, and History. The Holds tab is selected, and the Hold Summary grid is visible. The grid has four columns: Hold, \*Hold Status, Message, and Pending Action By. There are two rows of holds:

Hold	*Hold Status	Message	Pending Action By
No Bill To Contact	Requires Action	A Bill To Contact is required for proper processing. Specify a Bill To Contact and resubmit. If a contact is specified, ensure that the proper options are specified in the contact setup.	Order Capture Admin Order Capture Manager UPG_ALLPAGES
No Ship To Contact	Requires Action	A Ship To Contact is required for proper processing. Specify a Ship To Contact and resubmit. If a contact is specified, ensure that the proper options are specified in the contact setup.	Order Capture Admin Order Capture Manager UPG_ALLPAGES

At the bottom of the page, there are more navigation buttons: Submit, Save, Validate, Return to Search, Next, Previous, Clone, Add, Search, and Top of Page.

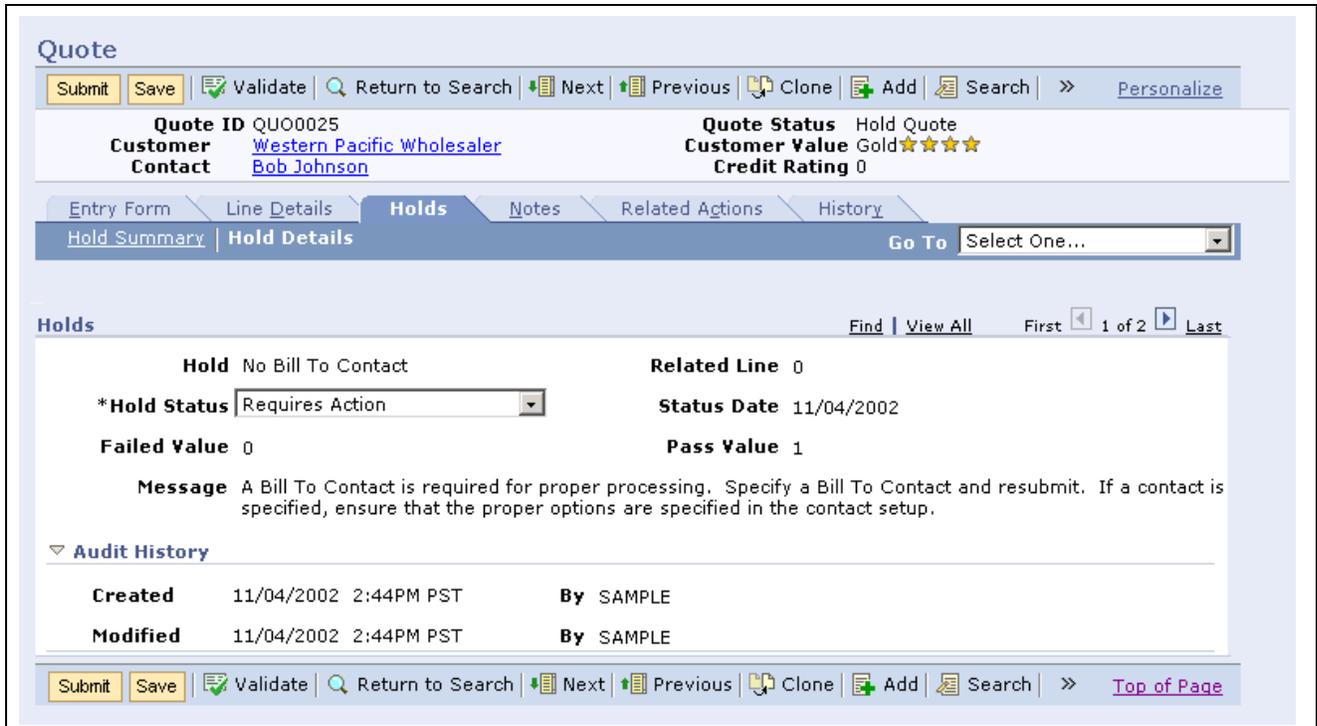
Quote - Holds page: Hold Summary grid

- Hold** Displays the description of the hold code.
- Hold Status** Displays the hold status. You can change the hold status if your user security allows you to override it.  
If you select *Override Hold* you can add a note to explain why the hold was overridden.
- Message** Displays the explanation of the hold.

**Pending Action By** List PeopleSoft roles that can override a specific hold code.

### Viewing Details or Removing Holds

Access the Quote - Holds page: Hold Details grid.



Quote page: Holds tab: Hold Details grid

- Hold** Short explanation of the reason for the hold.
- Related Line** Line number for the offending product(s).
- Hold Status** Current status of the hold. This is a display-only field for regular users, such as most customer service contacts. However, users with manager-level permissions can select one of the following statuses:
  - *Requires Action:* This selection indicates that action needs to happen. The system defaults to this status when the hold is created.
  - *In Process:* This selection indicates that the hold still needs to be addressed and some action is taking place in relation to the hold.
  - *Override Hold:* Select to ignore the hold and pass it. For example, you have a minimum price violation but are willing to allow the lower price for this order or quote. When this status is set, the system will no longer check the hold condition. When a hold is overridden, a note and reason can be assigned explaining why the hold was overridden.
  - *Passed:* This indicates that the hold has passed. The CSR can manually set this status, or the system will set this status when the order or quote has been submitted, and the condition has passed. When this status is set, the system will still check the hold condition, and set to *Requires Action* if the condition fails.

---

**Note.** A manager with the correct set of permissions can override the hold by placing the hold in *Override Hold* status and resubmitting the order or quote.

---

<b>Status Date</b>	Indicates the date the Hold status last changed.
<b>Failed Value</b>	This is the value that is causing the Hold Reason.
<b>Pass Value</b>	This is the value that is required to remove the hold.

---

## Maintaining Orders

This section provides an overview of order maintenance.

### Understanding Order Maintenance

Order maintenance and quote revisioning are triggered by the same toolbar button. This button allows changes to order data based upon configurable rules defined in the Capture Type Workbench. These rules determine the status of the order, and order lines, and will allow changes to certain data elements based upon this status.

To understand order maintenance, consider both the header statuses and the line statuses that are delivered out of the box, and how they map to the PeopleSoft Supply Chain Management fulfillment system. An order for example cannot be changed if has been shipped, or if the fulfillment system has not acknowledged its existence. In this overview section are two tables: one explains Order Capture header statuses and the second shows how line statuses in CRM map to PeopleSoft Supply Chain Management.

#### Header Statuses

Here are the delivered header statuses that can be displayed on the Entry Form:

Header Status	Description
2000 (In Fulfillment)	The order is in the process of fulfillment. Quotes cannot have a status of <i>In Process</i> since quotes are not part of fulfillment.
9000 (Hold)	There is an open hold on the order, based on hold conditions.
3500 (Fulfillment Hold)	The Fulfillment system has placed a hold on the order.
1500 (Partial Hold)	The Fulfillment system has placed a hold on some products on the order.
6000 (Complete)	The order has gone through the fulfillment process. It has been shipped, or installed depending upon whether it is a tangible product or a service.

Header Status	Description
1 (Canceled)	The order or quote has been canceled and no further action on this order or quote is necessary.
950 (Queued)	The order or quote has been created for a future date and is queued for later automatic submittal.
5000 (Expired)	The quote date has passed so the quote has expired.
500 (New)	The order or quote is new and has not been submitted.
1000 (Submitted)	The order or quote has been submitted for processing.

See [Chapter 4, “Setting Up PeopleSoft Order Capture,” Defining Header Statuses, page 43.](#)

### Line Statuses

The following table shows the delivered line status mappings between Order Capture and PeopleSoft SCM:

SCM Line Status	CRM Line Status	CRM Line Partial Status
B (Backordered)	2000 (Backordered)	2100 (Partially Backordered)
C (Closed)	6000 (Shipped)	6100 (Partially Shipped)
CMTD	1050 (Sold)	1050 (Sold)
DENY (Deny)	1060 (Lost)	1060 (Lost)
DRAF (Draft)	1010 (Draft)	1010 (Draft)
H (On Hold)	3500 (Fulfillment Hold) <b>Note.</b> Holds that originate in CRM have the status, 9000. This is to differentiate a Hold that originated in CRM (status 9000), from a Hold that originated in SCM.	3500 (Fulfillment Hold)
I	5700 (Billed)	5750 (Partially Billed)
J	5750 (Partially Billed)	5750 (Partially Billed)

SCM Line Status	CRM Line Status	CRM Line Partial Status
K (Picked)	5000 (Picked)	5100 (Partially Picked)
L	5100 (Partially Picked)	5100 (Partially Picked)
O (In Fulfillment)	4000 (In Fulfillment)	4100 (Partially In Fulfillment)
P (Pending)	3000 (Pending)	3100 (Partially Pending)
Q (Requisitioned)	4500 (Requisitioned)	4600 (Partially Requisitioned)
RDY (Ready)	1030 (Priced)	1030 (Priced)
S (Shipped)	6000 (Shipped)	6100 (Partially Shipped)
T	6100 (Partially Shipped)	6100 (Partially Shipped)
U (Purchased)	5500 (Purchased)	5600 (Partially Purchased)
V	3700 (Reserved)	3750 (Partially Reserved)
W	3750 (Partially Reserved)	3750 (Partially Reserved)
X (Canceled)	1 (Canceled)	1 (Canceled)

See [Chapter 4, “Setting Up PeopleSoft Order Capture,” Defining Line Status Mappings, page 68.](#)

### Allowable Maintenance

For the purposes of an integration with PeopleSoft Supply Chain Management, Order Capture allows you to maintain orders where the header status is at least *Submitted* (1000) and not yet *Complete* (6000). Order Capture allows order maintenance out of the box, where PeopleSoft Supply Chain Management is the fulfillment system under the following conditions:

- If the header status is greater than *Submitted* (1000) but less than *Complete* (6000).
- If the line status is less than *Open* (1000), line configurations and attributes can be changed.
- If the line status is less than *In Fulfillment* (4000), line customer information can be changed.
- If the line status is less than *In Fulfillment* (4000), line pricing data can be changed.

Since an order with header status of *Queued* has not yet been submitted to back end processing, it is queued for later automatic submittal, a Queued order can be maintained. No change order is required if a Queued order is maintained, since no order has yet been sent to the fulfillment system.

Order Capture delivers integration points that support a realtime check into inventory to determine if the changes can be made based on the fulfillment status of the order. Additionally, all of the necessary integration points are delivered to pass the changed data to fulfillment in order to process the change request.

See [Chapter 8, “Integrating with Fulfillment and Billing Systems,” Understanding Fulfillment, page 125](#).

You can add products to an order or quote, change an order or quote, change the dates for a quote, and so on. With related actions, the system keeps a record of and links to the original quote or order, so that you can maintain a history of how the quote or order progressed. Both the revisioned quote and the original quote may be used and both remain in open status. This allows you to offer different revisions of the products and pricing to your customers, and allows the CSR (or sales representative) to order from either of the quotes. Only the revisioned order can be used once changes have been made to the order.

When order maintenance is complete, various order capture pages reflect the change activity. Upon order submission, not only is a new business project fired, the Related Actions page updated, but the History page is also updated to track those changes.

---

**Note.** Changes to a quote are through the quote revisioning process. Creating a quote revision copies the instance of the quote to a new quote, and increments the revision number. This enables you to modify the quote as required.

---

### **See Also**

[Chapter 8, “Integrating with Fulfillment and Billing Systems,” Activating Integration Points, page 130](#)

[Chapter 4, “Setting Up PeopleSoft Order Capture,” Creating Line Statuses, page 44](#)

[Chapter 4, “Setting Up PeopleSoft Order Capture,” Defining Header Status Mappings, page 67](#)

[Chapter 8, “Integrating with Fulfillment and Billing Systems,” Publishing Order and Quote Messages, page 132](#)

[Chapter 8, “Integrating with Fulfillment and Billing Systems,” Subscribing to Order Status Messages, page 139](#)

---

## **Viewing Related Actions**

This section discusses how to:

- View related actions.
- Work with business projects.

## Pages Used to View Related Actions

Page Name	Object Name	Navigation	Usage
Order - Related Actions, Quote - Related Actions	RO_ASSOCIATION	<ul style="list-style-type: none"> <li>Orders and Quotes, Add Orders Click the Related Actions tab.</li> <li>Orders and Quotes, Add Quotes Click the Related Actions tab.</li> </ul>	View related actions for orders and quotes.

## Viewing Related Actions

Access the Order - Related Actions page.

The screenshot shows the 'Order - Related Actions' page. At the top, there is a navigation bar with tabs for 'Entry Form', 'Line Details', 'Holds', 'Notes', 'Related Actions' (which is active), and 'History'. To the right of the 'Related Actions' tab is a 'Go To' dropdown menu with 'Select One...' selected. Below the navigation bar, the page is divided into three main sections:

- Related Actions:** A table with columns 'Type' and 'Description'. It contains three rows:
 

	Type	Description
1	Bulk Order	SM00055103/Status: Submitted
2	Business Project	Service Management Order BP - 20422 - Complete
3	Correspondence	Correspondence 7c13370a15ac11dba185aaaaee3bafd17458
- Business Process Instances:** A section with a 'Refresh Instance List' button (indicated by a circular arrow icon).
- Related Business Processes:** A table with columns 'Service Operation', 'Submit Date', 'Start Date', 'End Date', and 'Submitted By'. It contains one row:
 

Service Operation	Submit Date	Start Date	End Date	Submitted By
Telco Change Service	07/17/2006 8:52AM	07/17/2006 8:52AM	07/17/2006 8:54AM	Briseno,Diane

At the bottom of the page, there is a section titled 'Business Processes not initiated' with a 'Service Operation' column and the text 'No instance is available.'

Order - Related Actions page

This page enables CSRs to view related actions for the order. A related object is data, such as a business project, that is somehow related to the order or quote. This data can reside in another PeopleSoft CRM application.

### Related Actions



Click the View Details button to open the related object in a new browser window.

#### Type

This is the type of related action. Related actions include business projects, upsells, correspondence, etc.

### Business Process Instances

When you submit an order or quote, business processes fire immediately or are queued for future-dated orders and quotes. You can view the type of business process condition that is used on the Related Actions tab of the order entry form.

See [Appendix A, “Order Capture Delivered Business Processes and Web Services,” page 347.](#)

## Working with Business Projects

Business projects help organize process flow and are invaluable in tracing the order change activity. Order Capture business projects, including Order, Quote, and Order Maintenance business projects, are explained in detail in a preceding chapter.

### See Also

[Chapter 6, “Working with Order Capture Business Projects,” page 89](#)

---

## Viewing History

This section discuss how to view history details.

### Pages Used to View History

Page Name	Object Name	Navigation	Usage
Order - History, Quote - History	RO_HISTORY	Orders and Quotes, Search Orders and Quotes Select an order or quote and click the History tab.	For orders and quotes: <ul style="list-style-type: none"> <li>• View a history of change activity.</li> <li>• View interaction history.</li> <li>• View complete history of activity.</li> </ul>

### Viewing History Details

Access the Order - History page.

### Order

Save
Personalize
Copy to Quote
Clone
Return to Search
Next
Previous
Add
Search
»

**Order ID** CRO0307074

**Customer Contact**

**Order Status** Submitted Order

**Customer Value**

**Credit Rating** 0

Entry Form
Line Details
Holds
Notes
Related Actions
History

Change History
Interaction History
Show All History
Go To Select One...

**Change History** Customize | Find | First 1 of 1 Last

Description	Changed By	Associated Date	History Status
1 Order Submitted	JimD,JimD	06/07/2004 1:57PM	Audit

**Interactions** Customize | Find | 1 of 1

Date/Time Created	Type	Channel	Contact Name	Subject/Description	Created By
06/07/2004 1:59PM	Outbound	Email	JimD JimD	Order CRO0307074 Confirmation	JimD JimD

▼ **Audit History**

<b>Created</b>	06/07/04 1:56PM PDT	CPCUST	JimD,JimD
<b>Modified</b>	06/07/04 1:58PM PDT	CPCUST	JimD,JimD

Save
Top of Page
Copy to Quote
Clone
Return to Search
Next
Previous
Add
Search
»

Order - History page



# CHAPTER 14

## Working with Bulk Orders

This chapter provides an overview of bulk order enablement, and discusses how to:

- Implement bulk order functionality.
- Create bulk orders.

---

### Understanding Bulk Order Enablement

Bulk order functionality allows a customer service representative (CSR) to place single orders for multiple recipients as part of a single transaction. For example, a department manager in a company may want to order twenty office phones, one for each of their direct reports, and have each phone shipped directly to their employee. They can now perform this function using bulk order creation without having to enter separate orders for each recipient.

---

**Note.** Subsequent to order submission, Order Capture creates orders for each of the recipients. These orders can later be maintained and fulfilled individually.

---

Bulk ordering allows you to perform the following tasks in Order Capture:

- Create bulk orders directly from the main CRM menu.
- Take orders for multiple recipients within an organization. These selections are based on the Relationship Hierarchy for a customer.
- Specify more than one order (create multiple orders) per recipient.
- Create a master order that is associated to numerous recipient orders, and view a summary of all recipient orders associated with a master order.
- Copy attribute and configuration information from the master bulk order to recipient orders.
- Apply discounts (pricing rules) at the master order level.
- Perform hold processing and validation routines normally associated with regular orders.

---

**Note.** Bulk order uses a hold condition where recipients have not been specified for the recipient orders.

---

- Default account information for customers selected in the communications industry.

## Implementing Bulk Ordering

This section discusses how to:

- Define bulk order business unit options.
- View or edit bulk order header statuses.
- View or edit bulk order hold codes.
- Enabling bulk order hold processing.

### Page Used to Implement Bulk Ordering

Page Name	Object Name	Navigation	Usage
Order Capture Definition	BUS_UNIT_RO1	Set Up CRM, Business Unit Related, Order Capture Definition	Define bulk ordering defaults for your business unit in the Bulk Order group box.
Header Statuses	RO_DEFN_HDSTAT	Set Up CRM, Product Related, Order Capture, Setup Workbench, Capture Setup Tables  Click the Header Statuses link on the Capture Setup Tables page.	View or edit bulk order header statuses.
Hold Codes	RO_DEFN_HOLD	Set Up CRM, Product Related, Order Capture, Setup Workbench, Capture Setup Tables  Click the Hold Codes link on the Capture Setup Tables page.	View or edit bulk order hold codes.
Hold Processing	RO_TYPE_HOLD	Set Up CRM, Product Related, Order Capture, Capture Type Workbench, Type Definition  Click the Hold Processing link on the Type Definition page.	Enable the bulk order holds for an Order Capture capture type, such as order or quote.

## Defining Bulk Order Business Unit Options

Access the Order Capture Definition page.

Bulk Order	
<b>Consumer Hierarchy</b>	<input type="text" value="CONS_HIERARCHY"/> 
<b>Organization Hierarchy</b>	<input type="text" value="CUST_HIERARCHY"/> 
<input type="checkbox"/> <b>Multiple Orders Per Recipient</b>	

Order Capture Definition page: Bulk Order group box

## Bulk Order

On the Order Capture Definition page you will plug in relationship views for both consumers and organizations. Your master order/recipient order relationships are determined by the relationships you have established in the Relationship Viewer. Therefore, you must first define your relationship views in Set Up CRM, Common Definitions, Customer, Configure Relationship Views.

- |                                      |   |
|--------------------------------------|---|
| <b>Consumer Hierarchy</b>            | Select a relationship view for a single consumer, or contact. This will determine all of the possible bulk order recipients at runtime by automatically populating all of the child relationships for the parent chosen here. |
| <b>Organization Hierarchy</b>        | Select a relationship view for the company, or organization. When the end user enters a company name, it will prompt against the table you select here to determine the child relationships available.                        |
| <b>Multiple Orders Per Recipient</b> | Select this check box if you want to allow single recipients to receive more than one order. An Order field appears on the runtime page, allowing you to enter the number of orders you want to specify per recipient.        |

## Viewing or Editing Bulk Order Header Statuses

Access the Header Statuses page.

Capture Setup Tables

Header Statuses

Workbench

Save Refresh Clone Search Next Previous Workbench Personalize

Description Core Setup Data SetID SHARE

Header Statuses Customize Find First 1-12 of 12 Last

Status	*Description	Allow Manual Change To Status		
1	1 Canceled	<input checked="" type="checkbox"/>	+	-
2	350 Generating	<input type="checkbox"/>	+	-
3	400 Generated	<input type="checkbox"/>	+	-
4	500 New	<input type="checkbox"/>	+	-
5	950 Queued	<input type="checkbox"/>	+	-
6	1000 Submitted	<input type="checkbox"/>	+	-
7	1500 Partial Hold	<input type="checkbox"/>	+	-
8	2000 In Fulfillment	<input type="checkbox"/>	+	-
9	3500 Fulfillment Hold	<input type="checkbox"/>	+	-
10	5000 Expired	<input type="checkbox"/>	+	-
11	6000 Complete	<input checked="" type="checkbox"/>	+	-
12	9000 Hold	<input type="checkbox"/>	+	-

Header Statuses page

There are two statuses specifically for bulk orders: *Generating*, and *Generated*.

### Generating

Change the Description name or select the Allow Manual Change to Status check box to allow the CSR to manually change the header status during bulk order entry.

This header status indicates that Order Capture is in the process of generating recipient orders. This status appears when the CSR clicks the Generate Bulk Order or Submit Order buttons on the Summary page.

### Generated

The Generated status indicates that the recipient orders have been generated.

## Viewing or Editing Bulk Order Hold Codes

Access the Hold Codes page.

Capture Setup Tables

Hold Codes

Workbench

Save | Refresh | Clone | Search | Next | Previous | Workbench | Personalize

Description Core Setup Data SetID SHARE

Hold Codes Find | View All First 36 of 50 Last

Hold Code NRECI + -

\*Level Header \*Allow Manual Change To Status

\*Description No recipients selected on Bulk Order

Long Description Hold triggered when no recipients selected on Bulk Order

Applies To

Non-partner orders placed by an enterprise user

Partner orders placed by an enterprise user

Orders placed by partner user

Hold Processing

Specify the Application Class that controls the processing for this hold. Classes specified here must extend RO\_CAPTURE:BusinessLogic:Abstract:HoldValidation

Application Class ID NoRecipientsHold Package Tree Viewer

Application Class Path RO\_CAPTURE\_TYPES:Core:HoldValidat

Hold Codes page

There are two holds for bulk orders. These are:

1. *No Recipients Selected*

The *NRECI* hold code applies to any bulk orders where no recipients have been defined.

2. *No Recipient Accounts*

In communications-specific transactions, the *NRACTS* hold code causes a hold on the bulk order if no recipient accounts have been selected for billing purposes.

## Enabling Bulk Order Hold Processing

Access the Hold Processing page.

**Type Definition**

**Hold Processing**

**Workbench**

Save | Refresh | Clone | Search | Next | Previous | Workbench | Personalize

**Capture Type** SO **SetID** SHARE  
**Description** Order

Insert the holds that will process for this capture type.

**Hold Codes** [Customize](#) | [Find](#) | First 1-50 of 50 Last

Enabled	Hold Code	Description	Details
<input checked="" type="checkbox"/>	NRECI	No recipients selected on Bulk Order	A Hold is triggered when no recipients selected on Bulk Order

Hold Processing page

Select the Enabled check box to activate either of the two bulk order hold codes on the Hold Processing page.

## Creating Bulk Orders

This section provides an overview of bulk order creation, and discusses how to:

- View and edit bulk order business projects.
- Select multiple recipients for bulk orders.
- Add recipients.
- View recipient orders.

## Understanding Bulk Order Creation

CSRs can create bulk orders in one of two ways:

- Create a regular order and then convert the order to a bulk order.



Click the Convert to Bulk Order icon on the Entry Form page to convert a regular order to a bulk order.

- The menu option, Create Bulk Order, is accessible from the primary CRM navigation, Orders and Quotes, Add Bulk Order. When CSRs click this menu option, they will go to the Entry Form page in Order Capture. However, the interface displays a new section appropriate for entering bulk ordering information.

## Pages Used to Create Bulk Orders

Page Name	Object Name	Navigation	Usage
Business Project	RC_BUS_PROCESS	Set Up CRM, Common Definitions, Business Projects, Business Project	View the business projects for bulk orders.
Entry Form	RO_FORM	Orders and Quotes, Add Bulk Order, Bulk Order	Create a bulk order.
Hierarchical View for Customer	RO_BULK_CUST_SEC	Click the Select Multiple Recipients link on the Entry Form page.	Select multiple recipients for the bulk order.

## Viewing and Editing Bulk Order Business Projects

Access the Bulk Order page.

**Business Project** BULK\_ORD\_SUBMIT

Find First 1 of 1 Last

Effective Date: 06/12/2003      Status: Active

\*Description: Submit Bulk Order Children      Short Description: Submit Bul

\*Type: Main Business Project      Set Outcome: Automatically

**Time to Complete**

\*Time Units: Minute(s)      Times are recalculated when the Business Project is Validated.

Standard Time:      Standard Calculated Time: 0

Maximum Time:      Maximum Calculated Time: 0

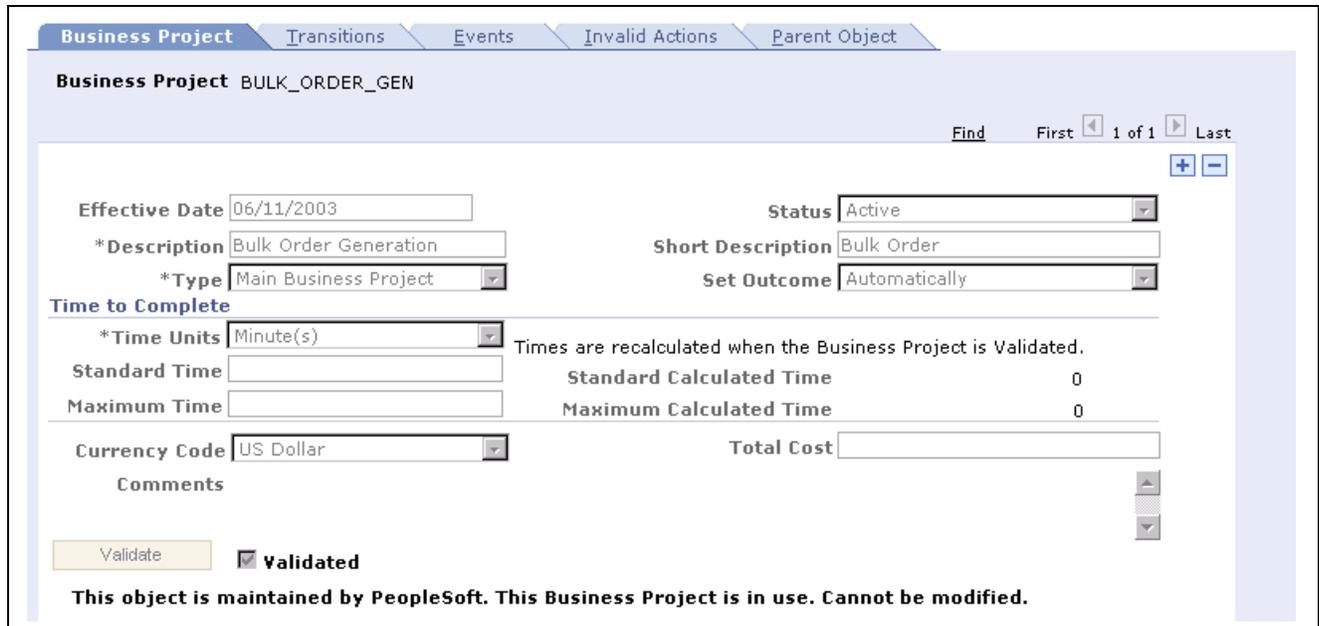
Currency Code: US Dollar      Total Cost:

Comments: Business project will first generate any child orders that have not yet been generated, then will submit all child orders for the Bulk order.

Validate       Validated

**This object is maintained by PeopleSoft. This Business Project is in use. Cannot be modified.**

Submit Bulk Child Orders Business Project



**Business Project** BULK\_ORDER\_GEN

Find First 1 of 1 Last

Effective Date: 06/11/2003 Status: Active

\*Description: Bulk Order Generation Short Description: Bulk Order

\*Type: Main Business Project Set Outcome: Automatically

**Time to Complete**

\*Time Units: Minute(s) Times are recalculated when the Business Project is Validated.

Standard Time: Standard Calculated Time: 0

Maximum Time: Maximum Calculated Time: 0

Currency Code: US Dollar Total Cost:

Comments:

Validate  Validated

**This object is maintained by PeopleSoft. This Business Project is in use. Cannot be modified.**

Bulk Order Generation Business Project

PeopleSoft delivers two business projects for bulk orders:

- Submit Bulk Child Orders business project (BULK\_ORD\_SUBMIT)

This business project both generates and submits all recipient orders for processing.

- Bulk Order Generation business project (BULK\_ORD\_GEN)

This business project generates recipient orders from the list of recipients on the bulk order. It is invoked when you click the Generate Bulk Order button on the Entry Form. Note that unlike the other business project, it does not submit the recipient orders for processing.

## Selecting Multiple Recipients for Bulk Orders

Access the Entry Form page: Customer group box.



**Customer**

Customer Alliance Group

Contact Paula Smith

Select Multiple Recipients

Entry Form page: Customer group box

Enter or select the Customer and Contact information for the bulk order. Then, click the Select Multiple Recipients link to access the Multiple Recipients page and select all the child recipients for the bulk order.

## Adding Recipients

Access the Hierarchical View for Customer page.

**Hierarchical View for Customer**

**Customer** Alliance Group **Contact** Paula Smith

Filter

**Customer Hierarchy**

Expand All | Collapse All Find First 1-6 of 6 Last

- Alliance Group
  - SUBSIDIARY
  - Contact
    - Smith, Paula**
    - Bickers, Colin
    - Carman, Jake

**Recipients** View All First 1-3 of 3 Last

<input type="checkbox"/>	Customer Name	Contact Name
<input type="checkbox"/>	Alliance Group	Smith, Paula
<input type="checkbox"/>	Alliance Group	Bickers, Colin
<input type="checkbox"/>	Alliance Group	Carman, Jake
<input type="checkbox"/> Clear All / Check All		

Hierarchical View for Customer page

Based on relationship views, you can select the child recipients for the bulk order here. The Filter field allows you to narrow your search results with specific name parameters, thereby restricting the search results. From the Search Results tree view on the left, click the Add button to create a list of actual recipients.

If multiple orders is enabled (by selecting the check box on the Order Capture Definition page) then the number of orders for each recipient could be entered separately in that field. Once all recipients have been selected, return to the main order entry form page to save or submit the bulk order.

## Viewing Recipient Orders

Access the Entry Form page: Recipient group box.

**Recipient Orders** Customize Find View All First 1-3 of 3 Last

	Customer Name	Contact Name	Order ID	Status
1	Alliance Group	Smith, Paula	c026c46cc87a11d99f86	New
2	Alliance Group	Bickers, Colin	c0ef09a0c87a11d99fb4	New
3	Alliance Group	Carman, Jake	c13db719c87a11d99fb4	New

**Product Summary**

	Product Description	Product ID	Unit of Measure	Total Quantity	Total Price
1	Supplex Shorts, Men's	10006	Each	1500.0000	127500.00

**Totals**

Description	Amount	Currency
One Time Charges	127,500.00	
<b>Total One Time Charges</b>	<b>127,500.00</b>	USD

Entry Form page: Recipient group box

On this page, you can view the Recipient Orders group box, and drill into the recipient orders.

**Generate Recipient Orders** Click this button at the foot of the page to create recipient orders without submitting them for processing. These then become *New* recipient orders.

You may want to use this option if you want to navigate to a specific order and change it.

---

**Note.** After generating recipient orders, but prior to submitting them, CSRs can edit the recipient orders and all of the changes are applied.

---

**Submit Recipient Orders** Click this button to both generate and submit all recipient orders for processing.

---

**Note.** If you are integrating to PeopleSoft Order Management (SCM), you must define a Sold To relationship for companies and their contacts in the relationship hierarchy, otherwise recipient orders go on *Hold*. You can inactivate the *Hold* condition from the Capture Type workbench. The same hold condition principle applies for both Bill To and Ship To relationships.

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## CHAPTER 15

# Understanding Order Capture Integration with PeopleSoft Policy and Claims Presentment and PeopleSoft Banking Transactions

This chapter discusses:

- Integration functionality
- Order Capture integration with Policy and Claims Presentment
- Order Capture integration with Banking Transactions

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## Integration Functionality

Integration of the best features from Order Capture and PeopleSoft industry solutions gives users more than one method to apply for products or quotes. There are two entry points: the Find Products and Order Capture components. The Order Capture Configurator is used to collect information for product applications and quotes. PeopleSoft takes this functionality one step further by enhancing the component configurations available in the user interface for the Order Capture application.

The high-level functions provided by this integration include:

- Policy and Claims Presentment and Banking Transactions users have more than one method to apply for products or quotes.
- Configurator within Order Capture will collect information for product applications and quotes.
- Order Capture data model tracks product applications and quotes, as well as supports the re-quoting process.
- The ability to interact with external systems to obtain quotes real-time and save them in the CRM database.
- The ability to track an application or quote that resulted in creation of an account or policy.
- Enhanced Order Capture user interface with flexible configurable options.
- The ability for a partner to request a quote.

---

## Order Capture Integration with Policy and Claims Presentment

This section discusses the business process model used to integrate Order Capture and Policy and Claims Presentment.

## Policy and Claims Presentment Business Process Model

There are two methods for initiating a quote application available to Customer Service Representatives (CSRs): 360 - Degree View search page and the Create Order component. The CSR also has two methods of viewing or resuming an incomplete quote application: Identify the customer and select Incomplete Quote from the 360 - Degree View, or navigate to Search Quotes and Orders and search for the incomplete quote by customer name or quote reference number.

The created quotes and policies are displayed on the 360 - Degree View of the customer regardless of what method is used. Each quote goes through various transition stages and displays a Status.

The following table describes the various Status values of a quote application.

Status	Description
NEW	The status of Quote is <i>NEW</i> when CSR clicks on Create Quote and before selecting a product.
INCOMPLETE	A Quote is <i>Incomplete</i> when all the needed information for obtaining a Quote is not available.
SUBMITTED FOR QUOTE	This state implies that a request is sent to an external system to get a price for the configured quote. A quote is set to this state when Get Price is clicked.
QUOTED	This state implies a quote is obtained from an external system, but not yet purchased by the customer. A quote is set to this state upon receiving a price from the external system.
QUOTE ACCEPTED	This state implies that a customer has accepted the quote and is willing to purchase. The quote information is sent to external system for policy creation. Quote is set to this state when Buy is clicked
EXPIRED	This state implies a Quote is expired as of expiration date. This state can be achieved by manually expiring the Quotes or a batch process expiring the Quotes.
APPROVED	This state implies that the request for Policy creation is processed by the external system and a Policy is created in CRM system. This status will be set by the inbound async integration point. Also, it implies that a Quote is converted to Application.
REJECTED	This state implies that the request for policy creation is rejected by the external system. This status will be set by the inbound asynchronous integration point.

### 360 - Degree View Search Page

The customer must be identified clearly with the proper role. The CSR can choose to either search and browse a catalog, or select Create Quote. If the catalog path is chosen, the underlying Order Capture records are created using Component Interface, and one of the methods to collect information is initiated. If Create Quote is selected, the CSR is transferred to the Order Capture component. The actions associated with the selected product are evaluated to determine if a quote can be offered on the product.

## Create Order

Selecting the Order Capture component, the CSR or a partner can choose to identify the customer or create a quote for an anonymous customer.

Products can be selected in the following ways:

- Enter the product and click on Collect Information.
- Search and browse the catalog. When a product is selected, one of the methods to collect information is initiated.
- Select a promotion to add a product and click on Collect Information

---

## Order Capture Integration with Banking Transactions

This section discusses the business process model used to integrate Order Capture with the Banking Transactions.

### Banking Transactions Business Process Model

The same two methods for initiating a quote application in Policy and Claims Presentment are available to Customer Service Representatives (CSRs) using Banking Transactions: 360 - Degree View search page and the Create Order component. Because the industries have different business processes, Banking Transactions initiates an application for products, whereas the Policy and Claims Presentment business process initiates an application for a quote.

---

**Warning!** Policy and Claims Presentment users apply for a quote application. Banking Transactions users apply for a product application.

---

The CSR also has two methods of viewing or resuming an incomplete quote application: Identify the customer and select Incomplete Application from the 360 - Degree View, or navigate to Search Quotes and Orders and search for the incomplete quote by customer name or application reference number.

The created applications are displayed on the 360 - Degree View of the customer regardless of what method is used. Each application goes through various transition stages and displays a Status accordingly.

The following table describes the various Status values of a product application.

Status	Description
NEW	The status is <i>NEW</i> when CSR clicks on Apply Product and before collecting any information.
INCOMPLETE	An application is <i>Incomplete</i> when all the needed information to complete the application is not available. Upon selecting Save for Later, the application is marked incomplete
SUBMITTED	This state implies that the information is sent to external system for Account creation. An Application is set to this state when 'Submit' button is clicked

Status	Description
EXPIRED	This state is when the application for the product has <i>Expired</i> .
APPROVED	This state implies that the request for account creation is processed by the external system and an account is created in CRM system. This status will be set by the inbound asynchronous integration point.
REJECTED	This state implies that the request for Account creation is rejected by the external system. This status will be set by the inbound async integration point.

### 360 - Degree View Search Page

The customer must be identified clearly with the proper role. The CSR can choose to either search and browse a catalog, or select Apply Product. If the catalog path is chosen, the underlying Order Capture records are created using Component Interface, and one of the methods to collect information is initiated. If Apply Product is selected, the CSR is transferred to the Order Capture component. The product actions determine if a quote is required for the selected product.

### Create Order

Banking Transaction users use Order Capture to apply for a product application or Claims Presentment users can obtain a quote application. Use the main order form for both of these types or orders, which is configured differently from a standard order. For instance, the billing section may be turned off via the display templates mechanism. Enter a customer and then select a product. After selecting the product, you have the ability to complete the application process using the PeopleSoft Configurator. You can then submit the application from the order capture page.

---

## Order Capture Self-Service for Banking Transactions and Policy and Claims Presentment

The high-level functions provided by this integration are:

- Ability to clone a quote that is associated with the policy and launch Configurator with all known values.
- Ability to search for and view product applications or quotes.
- Ability for guest users to search and browse catalogs.

In order to apply for a product, the user has to either sign in using an existing account or register.

- Ability to create quotes for incomplete applications, with status marked *Incomplete*.

---

**Note.** There is no quoting process for Banking Transactions. All information is collected before account creation. There are no additional questions asked upon final submission.

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See *PeopleSoft Enterprise Policy and Claims Presentment 9 PeopleBook*, “Working with Policy and Claims Presentment Self-Service” and *PeopleSoft Enterprise Banking Transactions 9 PeopleBook*, “Working with PeopleSoft Enterprise Banking Transactions for Self-Service”.

## CHAPTER 16

# Working with PeopleSoft Proposal Management

This chapter provides an overview of the PeopleSoft Proposal Management integration and integration points and discusses how to:

- Set up PeopleSoft Proposal Management integration in Order Capture.
- Use PeopleSoft Proposal Management in Order Capture.

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## Understanding PeopleSoft Proposal Management Integration

PeopleSoft Proposal Management is part of a suite of Enterprise Service Automation (ESA) applications, within PeopleSoft Financial Management Solutions' product line. PeopleSoft CRM has the ability to send PeopleSoft Proposal Management information when an engagement service product is included in a quote. This occurs if the quote originates from a PeopleSoft Sales lead or opportunity, or if the quote is entered directly on the Order Capture Entry Form. Integration points between Order Capture and PeopleSoft Proposal Management are synchronous in order to receive the proposal and version IDs assigned when a proposal is created.

You can also receive pricing information when an engagement is fulfilled in PeopleSoft Proposal Management. Updates are made to prices on the quote and on the lead or opportunity. PeopleSoft CRM workflow informs the sales representative that the lead or opportunity has been updated. Status updates are transmitted between PeopleSoft Sales and the Proposal Management system when a lead or opportunity or quote is sold or lost. This again occurs through the Order Capture application.

Organizations must make informed decisions about which opportunities to pursue based on estimated cost and potential revenue. In addition, each opportunity may have several different scenarios for its completion, each with its own estimated costs. At any point in your business cycle, your organization may be faced with service-related opportunities. Customers using Order Capture can initiate service-based proposals from within Order Capture through an interface with PeopleSoft Proposal Management. For opportunities requiring manual entry, you can create and price multiple service-based proposals.

Engagement services are tracked as service-type products in the PeopleSoft CRM Product Data Model. Sales users can add these product types to a lead or opportunity. The price is pulled from the list price and sales users can override it with an initial price. When the lead or opportunity is converted to a quote and the quote is submitted, a message is sent from Order Capture to PeopleSoft Proposal Management with the necessary information for the engagement to be priced. A proposal is created for each product line sent to PeopleSoft Proposal Management.

Order Capture's integration to PeopleSoft Proposal Management allows your organization to perform all of the following activities:

- Generate multiple proposal versions to find the situation that best fits your business needs. Once a proposal is finalized, you can use the data you have already entered for that proposal to create contracts and projects in PeopleSoft Contracts and PeopleSoft Project Costing, assuming you have purchased those Enterprise Service Automation application modules.

- Pursue an initiative or engagement service contract that has not yet been accepted.
- Create and edit proposals, copy proposals, customize rates, view all current proposals, configure a list to view only selected proposals, view overall proposal cost and billing information, and store and view relevant files such as requests for proposals and terms and conditions.
- Create versions of a project that could possibly be done in different ways. This highlights cost differences between completing an assignment in a very short time frame using many resources, and completing the same assignment in a longer time frame with fewer resources. You can then look at the problem from different angles and choose the most practical solution.
- Develop and administer project proposals to better expedite closure of business opportunities, and reuse proposal versions for future engagements.

## Understanding Integration Points

Proposal integration consists of two application messages:

- OC\_ESA\_PROPOSAL

When a quote is submitted for an engagement-type service in Order Capture, Order Capture sends the proposal request message, OC\_ESA\_PROPOSAL, to PeopleSoft Proposal Management.

- OC\_ESA\_PROPOSAL\_RESPONSE

In response to this message, PeopleSoft Proposal Management sends the message, OC\_ESA\_PROPOSAL\_RESPONSE, to Order Capture to return the Capture ID, Proposal ID, and Version ID.

---

**Note.** The OC\_ESA\_PROPOSAL\_RESPONSE application message contains the record in which to receive the response data; the name of this record is ESA\_OC\_RESPONSE.

---

The system sends these fields from Order Capture to PeopleSoft Proposal Management:

Source: Order Capture		Target: PeopleSoft Proposal Management	
<i>Record</i>	<i>Field</i>	<i>Record</i>	<i>Field</i>
RO_HEADER	CAPTURE_ID	GM_PROPOSAL	CAPTURE_ID
BUS_UNIT_TBL_RO	BUSINESS_UNIT_ESA	GM_PROPOSAL	BUSINESS_UNIT
RO_LINE	PRODUCT_ID	GM_PROPOSAL	PRODUCT_ID
PROD_ITEM	DESCR	GM_PROPOSAL	PRODUCT_DESCR
RO_LINE	PRICE	GM_PROPOSAL	PRICE
RO_LINE	CURRENCY_CD	GM_PROPOSAL	CURRENCY_CD
RO_NOTE	DESCRLONG	GM_PROP_COMMENT	DESCRLONG
RB_INT_CUST_ADS	CUST_ID	GM_PROPOSAL	CUST_ID

Source: Order Capture		Target: PeopleSoft Proposal Management	
RSF_OPPORTUNITY or RSF_LEAD <b>Note.</b> System uses either record depending on if the quote has a lead or an opportunity attached.	SALES_USER_NAME	GM_PROPOSAL	SALESREP_NAME
<b>Note.</b> System uses PeopleCode to retrieve phone and extension information. Not a direct read of a record.	CC_PHONE_EXTENSION	GM_PROPOSAL	CC_PHONE_EXTENSION
<b>Note.</b> System uses PeopleCode to retrieve email address information. Not a direct read of a record.	EMAIL_ADDR	GM_PROPOSAL	EMAIL_ADDR
RO_ASSOCIATION	PROPOSAL_ID	GM_PROPOSAL	PROPOSAL_ID
RO_ASSOCIATION	VERSION_ID	GM_PROPOSAL	VERSION_ID
RO_HEADER	QUOTE_EXPIRE_DT	GM_PROPOSAL	DUE_DATE
RO_HEADER	DESCR50	GM_PROPOSAL	PROPOSAL_TITLE
RO_HEADER	CAPTURE_DATE	GM_PROPOSAL	BEGIN_DT
RO_HEADER	QUOTE_DUE_DATE	GM_PROPOSAL	END_DT

In response to the first message, the system sends these fields from PeopleSoft Proposal Management to Order Capture:

Source: PeopleSoft Proposal Management		Target: Order Capture	
<i>Record</i>	<i>Field</i>	<i>Record</i>	<i>Field</i>
ESA_OC_RSPN	PROPOSAL_ID	RO_ASSOCIATION	PROPOSAL_ID
ESA_OC_RSPN	VERSION_ID	RO_ASSOCIATION	VERSION_ID
ESA_OC_RSPN	CAPTURE_ID	RO_ASSOCIATION	CAPTURE_ID
ESA_OC_RSPN	BUSINESS_UNIT	RO_ASSOCIATION	ASSOC_BUS_UNIT
ESA_OC_RSPN	MESSAGE_TEXT	N/A	N/A

---

**Note.** The system uses the MESSAGE\_TEXT field to log error messages if any errors occur when the proposal is being created or updated.

---

PeopleSoft Proposal Management uses the customer number to query the customer table for customer name and current contact information. When PeopleSoft Proposal Management receives the message, the following occurs:

- If the proposal ID is blank, the system creates a new proposal.
- If the proposal ID is not blank, the system updates the existing proposal.
- If a quote has expired, you can revise it on the Entry Form in Order Capture.

This creates a new quote with a new capture ID. The system then passes the proposal ID to PeopleSoft Proposal Management from the original quote. PeopleSoft Proposal Management checks if the proposal has been closed out (proposal status equals *Canceled*). If it has, the system reopens the proposal for pricing (and the proposal status is updated to *Draft*).

## Quote Integration

Once pricing information is completed in PeopleSoft Proposal Management, the application message, ESA\_PROPOSAL\_PRICE, sends pricing information back to Order Capture. This occurs when a user clicks the Set To Ready button on the Maintain Proposal page in PeopleSoft Proposal Management. After the system sends the message to Order Capture, the selected proposal version is locked and uneditable.

The system sends these fields from PeopleSoft Proposal Management to Order Capture:

Source: PeopleSoft Proposal Management		Target: Order Capture	
<i>Record</i>	<i>Field</i>	<i>Record</i>	<i>Field</i>
GM_PROPOSAL	PROPOSAL_ID	RO_ASSOCIATION	PROPOSAL_ID
GM_PROPOSAL	VERSION_ID	RO_ASSOCIATION	VERSION_ID
GM_PROPOSAL	BUSINESS_UNIT	RO_HEADER	BUSINESS_UNIT
GM_PROPOSAL	TOTAL_BUDGET_AMT	RO_LINE	PRICE
GM_PROP_COMMENT	DESCRLONG	RO_NOTE	DESCRLONG

---

**Note.** PeopleSoft Proposal Management sends note descriptions to Order Capture, but Order Capture does not update them.

---

## PeopleSoft Sales Integration

The system triggers the Order Capture application message, OC\_ESA\_PROPOSAL\_STATUS, in the following situations:

- When a sales lead or opportunity is lost or sold.
- When the direct quote or order is sold.
- When the quote is cancelled (either manually, or from the quote expiring).
- When the quote needs to be repriced.

When PeopleSoft Proposal Management receives the message, it updates the corresponding proposal version with either the *Draft*, *Denied*, or *Committed* status, which is based on the contents of the message.

The system sends these fields from Order Capture to PeopleSoft Proposal Management:

Source: Order Capture		Target: PeopleSoft Proposal Management	
<i>Record</i>	<i>Field</i>	<i>Record</i>	<i>Field</i>
RO_ASSOCIATION	PROPOSAL_ID	GM_PROPOSAL	PROPOSAL_ID
RO_ASSOCIATION	VERSION_ID	GM_PROPOSAL	VERSION_ID
RO_ESA_BU	BUSINESS_UNIT_ESA	GM_PROPOSAL	BUSINESS_UNIT
RO_HEADER	CAPTURE_ID	GM_PROPOSAL	CAPTURE_ID
RO_LINE.STATUS	STATUS_CODE	GM_PROPOSAL	SUBMIT_STATUS
RO_NOTE	DESCRLONG	GM_PROP_COMMENT	DESCRLONG

When PeopleSoft Proposal Management receives the message, the following occurs:

- If the order capture line status is *Lost*, the system updates the proposal status to *Denied*.
- If the order capture line status is *Sold*, the system updates the proposal status to *Committed*.
- If the order is expired, the system updates the proposal status to *Canceled*.
- If the order capture line status is *Negotiate*, the system updates the proposal status to *Draft* and enables repricing for the related proposal version.
- If the status is *Ready* when a user selects a proposal, the system locks the proposal version and prevents editing.

## Quote Status Mappings

The table below shows how quote statuses map between Order Capture and PeopleSoft Proposal Management:

Order Capture Status	PeopleSoft Proposal Management Status
Draft	Draft
Priced	Ready
Negotiate	Draft
Lost	Denied
Sold	Committed
Canceled	Canceled

## Setting Up PeopleSoft Proposal Management Integration

This section provides an overview of the integration setup, and discusses how to:

- Define engagement service products for PeopleSoft CRM.
- Select a PeopleSoft Proposal Management business unit.
- View or edit Setup Workbench options.
- View or edit Integration Workbench options.
- View or edit the PeopleSoft Proposal Management business project.
- Activate the Proposal Management integration messages
- Run process scheduler.

### Understanding Setup for Proposal Management Integration

First define your engagement service product in the CRM product definition. The Engagement Services check box appears on the Product Definition pages for your primary application.

Next select the PeopleSoft Proposal Management business unit with which Order Capture integrates. Then we have added Proposal Management-specific settings to the Order Capture workbenches, allowing you some flexibility in how you set up certain essential operations. Two Order Capture workbench pages help control the statuses that will show up in the line status dropdown for quotes. The values that displayed in the dropdown depend on the current line status. The first page defines the status types. One type is used for the engagement services products. The other delivered type is *Default*, which is used if the product is not an engagement product. You can view and edit the business project, *Proposal Management BP*, that has been created for the integration. Finally, you will need to activate the PeopleSoft Proposal Management integration messages to begin to take advantage of this functionality.

### Pages Used to Set Up PeopleSoft Proposal Management Integration

Page Name	Object Name	Navigation	Usage
Product Definition	PROD_DEFN	Products CRM, Product Definition, Product Definition	Define engagement service-type products.
Order Capture Definition	BUS_UNIT_RO1	Set Up CRM, Business Unit Related, Order Capture Definition, Order Capture Definition	Map the Order Capture business unit to the corresponding business unit in PeopleSoft Proposal Management.
Header Statuses	RO_DEFN_HDSTAT	Set Up CRM, Product Related, Order Capture, Setup Workbench, Capture Setup Tables  Click the Header Statuses link on the Capture Setup Tables page.	View or edit the <i>Expired</i> header status for PeopleSoft Proposal Management integration.

Page Name	Object Name	Navigation	Usage
Line Statuses	RO_DEFN_LNSTAT	Set Up CRM, Product Related, Order Capture, Setup Workbench, Capture Setup Tables  Click the Line Statuses link on the Capture Setup Tables page.	View or edit engagement service line statuses.
Line Status Types	RO_DEFN_LS_TYPE	Set Up CRM, Product Related, Order Capture, Setup Workbench, Capture Setup Tables  Click the Line Status Types link on the Capture Setup Tables page.	View or edit engagement service line status types.
Line Status DropDowns	RO_DEFN_LNPRMPT	Set Up CRM, Product Related, Order Capture, Setup Workbench, Capture Setup Tables  Click the Line Status DropDowns link on the Capture Setup Tables page.	Control or view the dropdowns available for your engagement service products.
Line Status Mapping	RO_DEFN_LNSTMAP	Set Up CRM, Product Related, Order Capture, Integration Workbench, Integration Definitions  Click the Line Status Mapping link on the Integration Definitions page.	View or edit line status mappings between Order Capture and PeopleSoft Proposal Management.
Business Project Conditions	RO_TYPE_BPEVENT	Set Up CRM, Product Related, Order Capture, Capture Type Workbench, Business Project Conditions  Click the Business Project Conditions link on the Type Definition page.	View or edit the PeopleSoft Proposal Management business project, <i>Engagement Service BP</i> .

## Defining Engagement Service Products for PeopleSoft CRM

Access the Product Definition page.

Save Refresh

Product Software Application Install Product ID 700003  
Product Type Engagement SetID SHARE

Definition External Description Actigns Attributes Attachments Installed Product

**Product Details**

\*Name Software Application Install \*Status Active

Long Description Application installation for customer. This includes original installation and any followup.

**Order Standalone By**

Business  Consumer

Go to: [Product Relationships](#)

Save Refresh Add Update/Display

Product Definition page

Select a product type of *Engagement Service* to access the Product Definition page.

**Note.** The list price will represent a baseline price, and the Enterprise Pricer pricing engine will not be invoked for engagement services.

## Selecting a PeopleSoft Proposal Management Business Unit

Access the Order Capture Definition page.

Internal Self Service

**Business Unit** US001

\*Description US001 NEW YORK OPERATION: \*Status Open

\*Short Description US001  Default Business Unit  Submit Confirmation

**Business Unit**

FieldService US200 Marketing US001

Order Management US001 Proposal Management US001

Contracts US001 General Ledger US001

Order Capture Definition page

**Proposal Management** Select the PeopleSoft Proposal Management business unit which you want to integrate with Order Capture.

## Viewing or Editing Setup Workbench Options

There are several Order Capture Setup Workbench changes for this integration.

- Header Statuses.
- Line Statuses.
- Line Status Types.
- Line Status DropDown.

## Header Statuses

Access the Header Statuses page.

**Header Statuses**

Workbench

Save Refresh Clone Search Next Previous Workbench Personalize

Description Core Setup Data SetID SHARE

Header Statuses Customize Find First 1-12 of 12 Last

Status	*Description	Allow Manual Change To Status		
1	1 Canceled	<input checked="" type="checkbox"/>	+	-
2	350 Generating	<input type="checkbox"/>	+	-
3	400 Generated	<input type="checkbox"/>	+	-
4	500 New	<input type="checkbox"/>	+	-
5	950 Queued	<input type="checkbox"/>	+	-
6	1000 Submitted	<input type="checkbox"/>	+	-
7	1500 Partial Hold	<input type="checkbox"/>	+	-
8	2000 In Fulfillment	<input type="checkbox"/>	+	-
9	3500 Fulfillment Hold	<input type="checkbox"/>	+	-
10	5000 Expired	<input type="checkbox"/>	+	-
11	6000 Complete	<input checked="" type="checkbox"/>	+	-
12	9000 Hold	<input type="checkbox"/>	+	-

Header Statuses page

We have added one new header status to the existing list of headers statuses for Order Capture.

Since a quote has an expiration date, a batch job examines the quote expiration dates and assigns any expired quotes a new header status of *Expired*, or whatever you choose to call it here.

---

**Note.** This action also triggers an integration point to update any associated proposals in the PeopleSoft Proposal Management system to *Canceled*. The exception to this rule is, that if any other quote that is not expired has a reference to the same proposal ID, it will not be cancelled in PeopleSoft Proposal Management. If an *Expired* quote is revised, the line status for the engagement status will be reset to *Draft* and a message is automatically sent to PeopleSoft Proposal Management.

---

## Line Statuses

Access the Line Statuses page.

Capture Setup Tables

### Line Statuses

Workbench

Save Refresh Clone Search Next Previous Workbench Personalize

Description Core Setup Data SetID SHARE

Line Statuses Customize Find First 1-30 of 30 Last

	Status	*Description		
1	1010	Draft	+	-
2	1020	Requested	+	-
3	1030	Priced	+	-
4	1040	Negotiate	+	-
5	1050	Sold	+	-
6	1060	Lost	+	-

Line Statuses page

There are six line statuses for engagement services. These line statuses appear on the Entry Form page, and they map to corresponding statuses in PeopleSoft Proposal Management. You can edit the names of these statuses on this page.

## Line Status Types

Access the Line Status Types page.

Capture Setup Tables

### Line Status Types

Workbench

Save Refresh Clone Search Next Previous Workbench Personalize

Description Core Setup Data SetID SHARE

Line Statuses Customize Find First 1-2 of 2 Last

	Status Type	*Description		
1	10	Engagement Service	+	-
2	99999	Default	+	-

Line Status Types

The values displayed in the dropdown for the quote lines will depend on the line status. This page defines the status types. The *Engagement Service* line status type is used for engagement services products, whereas the *Default* line status type is used for any product that is not flagged as an engagement service product.

## Line Statuses DropDown

Access the Line Statuses DropDown page.

**Capture Setup Tables**

**Line Statuses DropDown**

**Workbench**

Save Refresh Clone Search Next Previous Workbench Personalize

**Description** Core Setup Data **SetID** SHARE

**Line Statuses** Customize Find First 1-9 of 9 Last

	*Status Type	*From Status	To Status		
1	Engagement Service	--- Any ---	Canceled	+	-
2	Engagement Service	Canceled	Draft	+	-
3	Engagement Service	Canceled	Lost	+	-
4	Engagement Service	Priced	Negotiate	+	-
5	Engagement Service	Priced	Lost	+	-
6	Engagement Service	Negotiate	Lost	+	-
7	Engagement Service	Lost	Draft	+	-
8	Default	--- Any ---	Canceled	+	-
9	Default	Open	Complete	+	-

Line Statuses DropDown page

What you define as your available status types on the Line Statuses page determines what you see on this page. Since we deliver *Engagement Service* and *Default*, you can specify alternative status dropdowns for each of these two types.

## Viewing or Editing Integration Workbench Options

Access the Line Status Mappings page.

**Integration Definitions**

**Line Status Mappings**

**Workbench**

Save Refresh Clone Search Next Previous Workbench Personalize

**Description** SHARE Integration values **SetID** SHARE

**Line Status Mappings** Customize Find First 1-10 of 10 Last

	Node Name	External Status	*CRM Status	Description	*Partial Status	Description		
1	EP881EI2	CMTD	1050	Sold	1050	Sold	+	-
2	EP881EI2	DENY	1060	Lost	1060	Lost	+	-
3	EP881EI2	DRAF	1010	Draft	1010	Draft	+	-
4	EP881EI2	RDY	1030	Priced	1030	Priced	+	-

Line Status Mappings page

Line Status Mappings are used because the Proposal Management uses Alpha-numeric status values, such as CMTD, DENY, etc. whereas CRM Order Capture uses numeric status values. This mapping between the status values ensures that the EIPs can communicate status information correctly.

## Viewing or Editing the PeopleSoft Proposal Management Business Project

Access the Business Project Conditions page.

**Type Definition**

**Business Project Conditions**

**Workbench**

Save Refresh Clone Search Next Previous Workbench Personalize

**Capture Type** QUO **SetID** SHARE  
**Description** Quote

Insert the business project events that will fire for this capture type.

**Business Project Events** Customize Find First 1-2 of 2 Last

*Sequence	Enabled	Event Name	Edit	*Business Project	Allow Multiple Instances		
10	<input checked="" type="checkbox"/>	CoreQuoteBP	Edit	Order Capture Quote BP	<input type="checkbox"/>	+	-
20	<input checked="" type="checkbox"/>	ESAOrderBP	Edit	ESA Integration BP	<input checked="" type="checkbox"/>	+	-

Business Project Conditions page

This business project consists of an application engine program, RO\_ESA\_PUB. The process runs if all of the following conditions apply: the application message, OC\_ESA\_PROPOSAL is active, the business project is active, and the business project event is set up and active. If no quote lines contain engagement service products, the program exits without calling any integrations. As with all Order Capture business projects, you can view the status of the business project on the Related Objects page.

## Activating PeopleSoft Proposal Management Integration Messages

To activate integration between Order Capture and PeopleSoft Proposal Management, you must activate these messages at the message level.

- OC\_ESA\_PROPOSAL
- OC\_ESA\_PROPOSAL\_RESPONSE
- ESA\_PROPOSAL\_PRICE
- OC\_ESA\_PROPOSAL\_STATUS

## Running Process Scheduler

We also added a PeopleTools Process Scheduler job which sets the status of quotes to *Expired* when the Quote Expire Date is less than the current system date. The quote line status values do not change, but the quote's header status is updated. If the quote contains an engagement service product for which a proposal has been created, it will send the OC\_ESA\_PROPOSAL\_STATUS message to PeopleSoft Proposal Management with a *Canceled* status, provided that no other quotes linked to this same proposal have expired.

To run this new job, navigate to PeopleTools , Process Scheduler, Schedule JobSet Definitions. You can schedule the process to run based on a Recurrence Name, or you can select the Run Now button to run the process immediately.

## Using PeopleSoft Proposal Management in Order Capture

This section explains the basic functionality available in Order Capture, and shows new views available for line details and summary.

PeopleSoft Proposal Management creates a proposal for each quote line that contains an engagement service. Engagement products may not be added directly to an order, but instead must be created on a quote. This allows the communication of the pricing information from PeopleSoft Proposal Management, and it allows the negotiation process to begin when a price is not acceptable to the customer. Once the price received from PeopleSoft Proposal Management is acceptable, the quote can be converted to an order, and the engagement service will change to a status of *Sold*, and be fulfilled. Only engagements with a status of *Priced* are copied over to the new order. For a quote line that contains an engagement service, the following all apply at runtime:

- Unit price is equal to the list price of the product, and this is changeable.
- Order quantity is equal to one.
- Unit of measure is equal to the default unit of measure for the product.
- Line price is protected and the pricing engine is not invoked for engagement services. The line can still be used by the pricing engine to give discounts to other lines or to the entire order
- Drill-down capability is added to the Related Objects page. This allows the CSR to view all of the specific details of the engagement in PeopleSoft Proposal Management.

### Line Details for Engagement Services Prior to Submission to PeopleSoft Proposal Management

Select an engagement service product and add it to the quote line.

Line Details									
Products		Availability & Pricing							
Line	Product Description	Product ID	*Unit of Measure	Order Qty	List Price	Unit Price			
1	<a href="#">Software Application Install</a>	10000		1.0000	20.00	20.00			
3	<a href="#">Kryptonite Cable</a>	10025	Each	1.0000	15.00	15.00			

Line Details (prior to submission to PeopleSoft Proposal Management)

You cannot change unit of measure or order quantity for engagement service-type products.

### Line Details for Engagement Services After Submission to PeopleSoft Proposal Management

Submit the engagement service quote to PeopleSoft Proposal Management.

Line Details							
Products		Availability & Pricing					
Line	Product Description	Product ID	Unit of Measure	Order Qty	List Price	Unit Price	Status
1	<a href="#">Software Application Install</a>	10000		1.0000	20.00	10600.00	Priced
3	<a href="#">Kryptonite Cable</a>	10025	Each	1.0000	15.00	15.00	Open

Line Details (post submission to PeopleSoft Proposal Management)

When a quote for an engagement service has been submitted to PeopleSoft Proposal Management, it is priced. The correct unit price now defaults in. At this point, you have two options:

- Convert the quote to an order, which marks the engagement service as being *Sold*.
- Revise the quote if the price is not acceptable to the customer, by setting the status to *Negotiate*. In this scenario, a message is automatically returned to PeopleSoft Proposal Management. They can then change their status to *Draft*, and can consider changing the price once more.

To perform this operation, click the Revise Quote (red crayon) icon on the Entry Form toolbar. On the quote copy, you can edit the quote lines, manually changing the status to *Negotiate*. Then you submit the quote once again. Order Capture sends its status EIP, OC\_ESA\_PROPOSAL\_STATUS, and requests that this proposal go into *Draft* status. The same process occurs and PeopleSoft Proposal Management reprices the engagement.

---

**Note.** Theoretically, a CSR or sales representative can go through the negotiation paradigm indefinitely. The final outcome may be to revise the quote and set status to *Lost*, where the customer has failed to agree to the terms of the offer.

---

---

**Note.** PeopleSoft Sales allows sales representatives to initiate a quote for an engagement from a lead or opportunity. The sales representative can go to that lead or opportunity to view the price on the engagement service product. PeopleSoft Sales information is continually updated by Order Capture, and it displays the same information that you find on the Entry Form in Order Capture.

---

## Business Project for Proposals

Access the Related Objects page in Order Capture.

When you drill into the *Proposal* business project on the Related Objects page, it shows a proposal ID and provides a direct link into PeopleSoft Proposal Management.

## CHAPTER 17

# Working with Interactive Reports for Order Capture

This chapter provides an overview of PeopleSoft CRM interactive reports and discusses how to:

- Set up interactive reports for Order Capture.
- Use interactive reports for Order Capture.

---

## Understanding CRM Interactive Reports

PeopleSoft CRM interactive reports are dynamic and interactive analytic reports. Interactive reports enable you to view and organize data in a wide variety of ways, which provides a more intensive overview of your collaborative selling activity.

You can better manage your sales solution activities by using interactive reports for Order Capture.

In Order Capture interactive reports, you can move around data elements on a report and instantly view the report using different dimensions. You can filter interactive reports data by selecting a single value for any dimension. You can also limit the interactive report so that it displays orders or quotes for one customer only. Looking at reports from different angles and perspectives affords an opportunity to gather valuable information about your business.

Interactive reports can be saved, exported to Microsoft Excel, or printed as hard copies. While you can be interactive with interactive reports by moving around data elements (dimensions), the changes that you make on the reports do not affect the PeopleSoft CRM database where the data originated.

### Order Capture Interactive Reports

CRM Order Capture delivers four interactive reports:

- Order Revenue (for a single business unit).
- Order Metrics (for a single business unit).
- Enterprise Order Revenue (for all business units).
- Enterprise Order Metrics (for all business units).

Enterprise reports can analyze data across the enterprise or by specific business unit. Regular reports are restricted to individual business units. Depending upon the role assigned, users have access to either the two enterprise interactive reports or the two regular interactive reports.

---

**Note.** If a user has access to the two enterprise interactive reports, then that user can view analytics for specific business units as well as the entire enterprise.

---

Access to interactive reports in Order Capture is determined by user role. It is therefore possible to restrict access to enterprise-wide interactive report information. Review the following table for a list of interactive reports that can be launched by each predefined Order Capture role:

Role	Enterprise Order Revenue	Enterprise Order Metrics	Order Revenue for Single Business Unit	Order Metrics for Single Business Unit
OCADMIN	No	No	No	No
OCMGR	Yes	Yes	Yes	Yes
OCREP	No	No	No	No

---

## Setup for Interactive Reports for Order Capture

The four interactive reports for Order Capture are set up from within the Analytics Installation Options component. Setup is detailed in *PeopleSoft Enterprise Components for CRM 9 PeopleBook*.

Setup includes specifying the model definition, query definition, and data source definition for each of the following:

- CR\_RO\_ORD\_METRICS\_BU (Order Metrics for a single business unit).
- CR\_RO\_ORD\_REVENUE\_BU (Order Revenue for a single business unit).
- CR\_RO\_ORD\_METRICS (Enterprise Order Metrics for all business units).
- CR\_RO\_ORD\_REVENUE (Enterprise Order Revenue for all business units).

---

**Note.** The Query Definition page does not require any changes during installation. However, the Model Definitions page requires updates at installation before you can run an Order Capture interactive report. Use the Model Definitions page to define the interactive reports server name as well as other locations that the runtime uses to launch interactive reports.

---

### See Also

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Using Interactive Reports”

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## Using Interactive Reports for Order Capture

This section provides an overview of the delivered Order Capture interactive reports.

When you access a interactive report directly from the menu navigation, a run control page appears. Enter the report criteria on this page. Default values for all fields are based on the run control that you last used; if you do not need to change the criteria, one click takes you to the interactive report. Alternatively, you can select a different run control (which updates the default values for the other fields), or you can directly edit the criteria fields.

Profiles are stored by user, which means that users who repeatedly use the same criteria can enter that criteria once. The run control criteria (all fields except the run control name) are shared across all Order Capture interactive reports. This means that when a run control is created while running a single Order Capture interactive report, it is still available for all other interactive reports.

## Dimensions

Interactive Reports are a combination of *Dimensions* and *Data Cubes*. Dimensions are static categories by which you group data, whereas the data cubes show the actual statistics. You can personalize the look of a interactive report by dragging and dropping the dimensions. Following are the available dimensions for Order Capture interactive reports:

<b>Currency</b>	Choose the type of currency. You can view only a single currency at a time from within an interactive report. All orders and quotes are captured in the base currency. To see all orders or quotes that were captured in U.S. dollars, select <i>USD</i> as the currency, and the orders will be converted into U.S. dollars. To see all of the orders and quotes captured in euros, select <i>Euros</i> as the currency.
<b>Business Unit</b>	Select all business units, or choose a specific business unit.
<b>Source</b>	Select all capture sources, or select a single capture source such as <i>Phone</i> .
<b>Months</b>	Select the month for which you want to view data. To view all of the data, select <i>All Months</i> .
<b>Region</b>	Select the geographic region. This is the region associated with the Sold To customer. This may not be defined for all orders and quotes, so a unique selection of <i>Not Specified</i> is used to show the data associated with orders and quotes without a region defined for the Sold To customer.
<b>Capture Type</b>	Select either <i>All Captures</i> , <i>Order</i> , or <i>Quote</i> . To view orders only, select <i>Order</i> . To view quotes only, select <i>Quotes</i> . Select <i>All Capture Types</i> to see both orders and quotes.
<b>Capture Status</b>	Select the status of the orders or quotes, for example, <i>All</i> , <i>Canceled</i> , <i>Hold</i> , <i>Open</i> , or <i>Pending</i> .

## Pages Used to Run Interactive Reports for Order Capture

Page Name	Object Name	Navigation	Usage
Order Revenue	CR_RO_ORD_REVENUE_BU	Orders and Quotes, Interactive Reports, Order Revenue	Launch the Order Revenue interactive report and view revenue information for a specific business unit.
Order Metrics	CR_RO_ORD_METRICS_BU	Orders and Quotes, Interactive Reports, Order Metrics	Launch the Order Metrics interactive report and view metrics for a specific business unit.
Enterprise Order Revenue	CR_RO_ORD_REVENUE	Orders and Quotes, Interactive Reports, Enterprise Order Revenue	Launch the Enterprise Order Revenue interactive report. You can select values and adjust dimensions to give an overall view of the enterprise. You can also view revenue information by business unit.
Enterprise Order Metrics	CR_RO_ORD_METRICS	Orders and Quotes, Interactive Reports, Enterprise Order Metrics	Launch the Enterprise Order Metrics interactive report. You can select values and adjust dimensions to give an overall view of the enterprise. You can also view metrics by business unit.

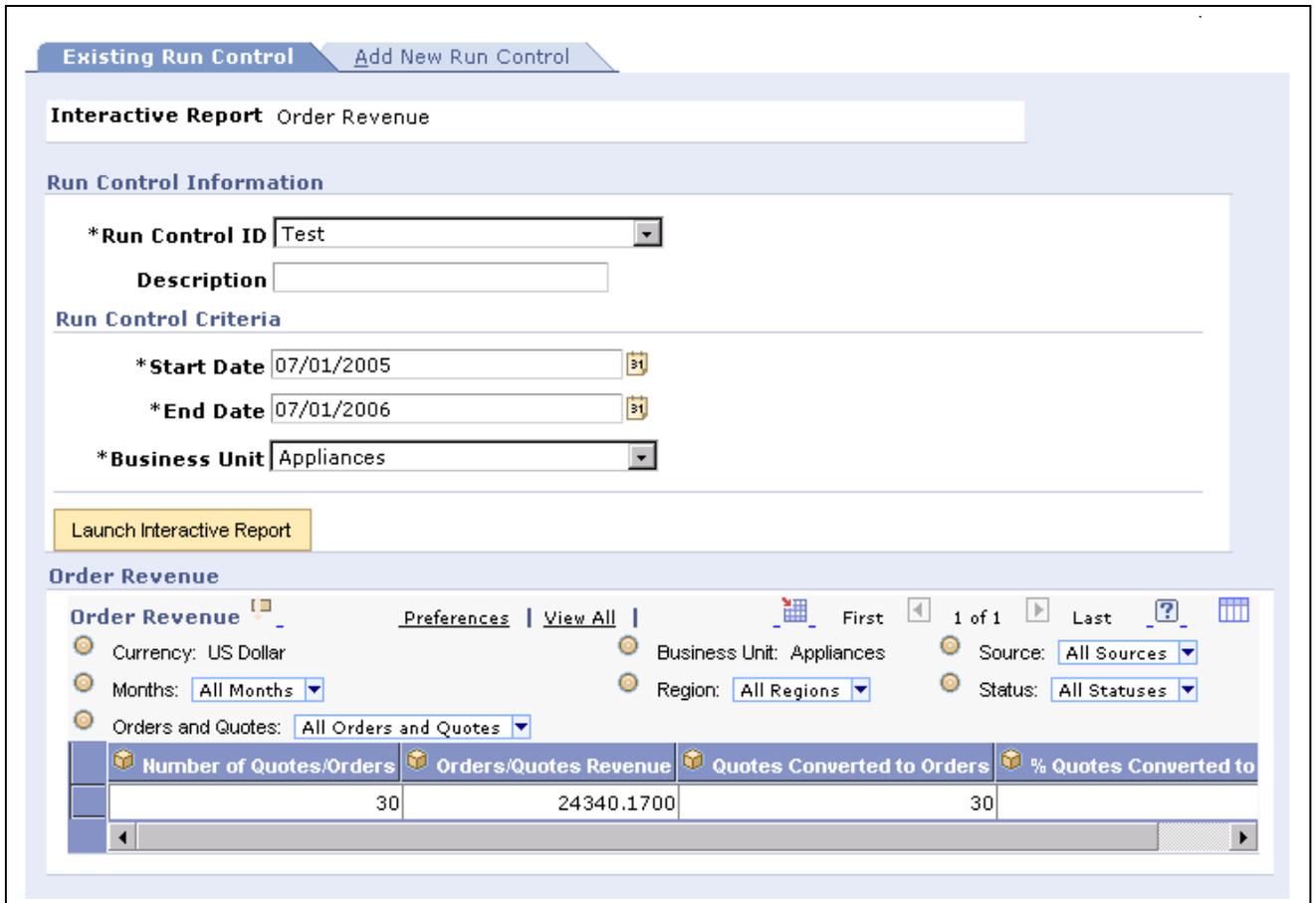
### Using the Order Revenue Interactive Report

Access the Order Revenue page.

---

**Note.** Use the run control criteria of *Start Date* and *End Date* to access this interactive report.

---



Order Revenue page

**Note.** The data elements (cubes) on this page are common to both Enterprise Order Revenue (for multiple business units) and Order Revenue for a single business unit.

- Number of Quotes/Orders** Displays the total number of orders and quotes captured by the system for the dimensions currently selected.
- Order/Quote Revenue** Displays the total value of the captures, in the selected currency for the dimensions currently selected.
- Quotes Converted to Orders** Displays the total number of quotes converted to orders for the dimensions currently selected.
- % Quotes Converted to Orders** Displays the total number of quotes converted to orders divided by the total number of quotes for the dimensions currently selected.

## Using the Order Metrics Interactive Report

Access the Order Metrics page.

**Note.** Use the run control criteria of *Start Date* and *End Date* to access this interactive report.

Number of Orders/Quotes	Avg Revenue per Order/Quote	Avg Discount per Order/Quote	Avg Lines per Order/Quote
30	811.3390	38.1243	

Order Metrics page

**Note.** The following data elements (cubes) are common to both the Enterprise Order Metrics interactive report (for multiple business units) and Order Metrics interactive report (for a single business unit).

<b>Number of Orders/Quotes</b>	Displays the total number of orders and quotes captured by the system for the dimensions currently selected.
<b>Average Revenue per Order/Quote</b>	Displays the average price of captured orders: the cumulative total revenue amount of all captures divided by the cumulative number of captures for the current dimensions.
<b>Average Discount per Order/Quote</b>	Displays the average discount applied to your orders. The average discount per capture is the cumulative total price minus the cumulative net price divided by the cumulative number of captures for the current dimensions.
<b>Average Lines per Order/Quote</b>	Displays the average lines per capture: the cumulative total of all capture lines divided by the cumulative number of captures for selected dimensions.

## Using the Enterprise Order Revenue Interactive Report

Access the Enterprise Order Revenue page.

**Note.** Use the run control criteria of *Start Date* and *End Date* to access this interactive report.

The Enterprise Order Revenue interactive report offers the same view as the Order Revenue interactive report, but the Enterprise Order Revenue interactive report shows the data across all business units.

## Using the Enterprise Order Metrics Interactive Report

Access the Enterprise Order Metrics page.

**Note.** Use the run control criteria of *Start Date* and *End Date* to access this interactive report.

The Enterprise Order Metrics interactive report offers the same view as the Order Metrics interactive report, but the Enterprise Order Metrics interactive report shows the data across all business units.

## **PART 3**

# **PeopleSoft Order Capture Self Service**

**Chapter 18**  
**Defining Order Capture Self-Service Business Units**

**Chapter 19**  
**Setting Up Order Capture Self-Service**

**Chapter 20**  
**Working With Order Capture Self Service**



## CHAPTER 18

# Defining Order Capture Self-Service Business Units

This chapter provides overviews of PeopleSoft business units and Order Capture Self-Service business units and discusses how to define Order Capture Self-Service business units.

---

## Understanding PeopleSoft Business Units

A business unit is an operational subset of your organization. Each business unit has its own way of storing information and each business unit possesses its own processing guidelines. You can use one business unit for all cases, or you can divide your operations based on whatever criteria makes the most sense. For example, you could create business units for different product lines or regions.

---

**Note.** PeopleSoft implementation personnel can also help you define the appropriate business unit structure.

---

Define PeopleSoft business units in this order:

1. Define global PeopleSoft business units, if you run multiple PeopleSoft applications.
2. Define PeopleSoft Customer Relationship Management (PeopleSoft CRM) business units.
3. Define Order Capture Self-Service business units.
4. Link PeopleSoft business units and PeopleSoft CRM business units to Order Capture Self-Service.

---

**Note.** Before you create multiple Order Capture business units, be sure that you understand the concept of *TableSet controls*, the mechanism used to determine valid values for fields on transactional pages.

---

See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Designer*

---

## Understanding Order Capture Self-Service Business Units

Order Capture Self Service business units provide the necessary defaults that enable self-service transactions, such as order creation and order tracking.

**Note.** Where applicable, business unit definition records must be synchronized across all systems. Business unit definitions created in PeopleSoft CRM are available in PeopleSoft Supply Chain Management. For fulfillment purposes, PeopleSoft Order Management and PeopleSoft Inventory business unit definitions must also be made available to PeopleSoft CRM. To synchronize business unit records across your business enterprise, use the business unit enterprise integration point.

**See Also**

*PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “Managing Enterprise Integration for PeopleSoft Enterprise CRM”

## Defining Order Capture Self-Service Business Units

This section discusses how to create an Order Capture Self-Service business unit.

**See Also**

Chapter 3, “Defining Order Capture Business Units,” *Defining Order Capture Business Units*, page 16

## Pages Used to Define Order Capture Self-Service Business Units

Page Name	Object Name	Navigation	Usage
Self-Service Options	BUS_UNIT_RO2	Set Up CRM, Business Unit Related, Order Capture Definition, Self-Service, Self-Service	Establish valid credit cards, carriers, ship to countries, and other business unit defaults for Order Capture Self-Service.

## Creating an Order Capture Self-Service Business Unit

Access the Self Service page.

The screenshot displays the 'Self Service' configuration page for Business Unit US001. At the top, there are tabs for 'Internal' and 'Self Service'. Below the tabs, the 'Business Unit' is set to 'US001' and the 'Description' is 'US001 NEW YORK OPERATIONS'. The 'Self Service' section contains several input fields and checkboxes:

- Default Self Service Source:** A dropdown menu set to 'Self-Service'.
- Telephone:** A text field containing '800 555 1212'.
- Email Address:** A text field containing 'customer\_care@peoplesoft.com'.
- Quick Entry Fields:** A spinner field set to '4'.
- Review Days:** A spinner field set to '30'.
- Advisor Dialog:** A text field with a search icon.
- Recommendation Template ID:** A text field with a search icon.
- Checkboxes:**
  - Show Phone Country Code
  - Add a New Note
  - Use Accounts
  - Show Partner Contact Details
  - Show Recommendation

Self Service page (1 of 2)

Valid Cards			Find	View All	First	1-3 of 3	Last
*Type	Card Name						
1	01	VISA					
2	04	AMERICAN EXPRESS					
3	05	DISCOVER					

Valid Carriers			Find	View All	First	1-4 of 4	Last
*Carrier	Default	Description					
1	UPS2DA	<input type="checkbox"/>	UPS 2nd Day Air				
2	UPSG	<input type="checkbox"/>	UPS Ground				
3	USPS1S	<input checked="" type="checkbox"/>	USPS First-Class Mail				
4	USPSPR	<input type="checkbox"/>	USPS Priority Mail				

Valid Ship To Countries			Find	View All	First	1-5 of 5	Last
*Country	Description						
1	CAN	Canada					
2	FRA	France					
3	GBR	United Kingdom					
4	IRL	Ireland					
5	USA	United States					

Self Service page (2 of 2)

Use the Internal tab to create Order Capture business units to which you can associate the self-service options.

### Self Service

**Default Self Service Source** Enter a code that identifies the source of the order. Every order generated in Order Capture Self-Service contains the source code that you define here.

---

**Note.** If you use both Order Capture and Order Capture Self-Service, this allows you to differentiate orders that were captured by way of the web channel from orders entered by a customer sales representative or sales representative within your organization.

---

**Show Phone Country Code** Select this check box to display country codes in the phone numbers within the address book.

**Telephone and Email Address** Enter a telephone number and email address. The default values entered here are displayed to users when viewing the status of their orders. For example, as a consequence, self-service users might see the following: “If you have questions, contact us at email@message.com or call us at 1 800 555 5252.”

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**Note.** For credit card authorization purposes, CyberSource requires a telephone number and an email address. To guarantee processing, PeopleSoft CRM submits these defaults to CyberSource when an email or phone number was not defined for the person for whom an order was created.

---

**Add a New Note** Select this check box to be able to add notes and attachments to the order in Order Capture Self-Service. If you clear the check box, you are unable to add notes to the order.

<b>Use Accounts</b>	Select this check box to display the additional payment option of <i>Accounts</i> in the billing payment section of the order. If you clear the check box, this billing payment subtab will not appear on the order.
<b>Quick Entry Fields</b>	Enter the number of blank rows available by default when users select the Quick Order Entry option.
<b>Review Days</b>	Enter the number of default days that you want to make viewable to users when they first view order and quote status.
<b>Show Partner Contact Details</b>	Click this check box to display information that can be made available on the self-service pages about products if the order is taken by a partner company.
<b>Advisor Dialog</b>	Select from your predefined advisor dialogs for the recommendations section of the Find Products page.
<b>Show Recommendation</b>	Select this check box to enable recommendations to customers for a current product choice. Recommendations are determined by the product recommendation functionality that is a part of the Find Products page. The functionality uses any existing defined advisor dialog to make recommendations. This is done in real time and the self-service user does not have to answer any questions at the time. The results are based on previous advisor sessions and customer details as defined in the advisor dialog.
<b>Recommendation Template ID</b>	Select a template for the business unit level that determines your desired format or customer requirements for the display of recommendation information on self-service pages.

### **Valid Cards, Valid Carriers, Valid Ship To Countries**

Define your valid credit cards, valid carriers, and valid ship to countries in the appropriate section on this page. Identify the default carrier in the Valid Carriers group box. Values will then be available for selection in the appropriate drop-down list box at runtime.

## CHAPTER 19

# Setting Up Order Capture Self-Service

This chapter provides a list of steps required to set up Order Capture Self Service. Since most of this involves setting up options that are also required for Order Capture, we have referenced that documentation here using direct links.

Once you have defined self-service business units, Order Capture Self-Service requires that you set up each of the following, in the order listed:

- Products.
- Pricing.
- Catalogs.
- Order Capture Setup Workbench options.
- Order Capture Type Workbench options.
- Order Capture Integration Workbench options.
- Carrier definitions.
- Credit cards.
- Tax provider options.
- Consumer and business registration.
- Anonymous user access (guest user access).

---

**Note.** Each of these setup elements is explained in detail in the following sections.

---

**See Also**

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

*PeopleSoft Enterprise CRM Enterprise Pricer 9 PeopleBook*

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, “Creating Catalogs”

Chapter 4, “Setting Up PeopleSoft Order Capture,” Setting Up Order Capture Tables, page 34

Chapter 4, “Setting Up PeopleSoft Order Capture,” Defining Order and Quote Processing, page 52

Chapter 4, “Setting Up PeopleSoft Order Capture,” Defining Integrations and Mappings, page 65

Chapter 4, “Setting Up PeopleSoft Order Capture,” Setting Up Freight Integration, page 71

Chapter 4, “Setting Up PeopleSoft Order Capture,” Setting Up Credit Card Integration, page 70

Chapter 4, “Setting Up PeopleSoft Order Capture,” Defining Tax Installation Options, page 75

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

*PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up Security and User Preferences,”  
Implementing Self-Service Security

## CHAPTER 20

# Working With Order Capture Self Service

This chapter provides an overview of Order Capture Self Service, delivered user ID and user role identification, and discusses how to:

- Select products.
- Use Quick Entry.
- Use the shopping cart.
- Manage checkout.
- View order or quote status.

---

## Understanding Order Capture Self Service

Order Capture Self Service delivers an intuitive interface that allows consumer users, company representatives, and brokers to easily create and manage the web channel. Order Capture Self Service synchronizes with Order Capture to allow self service users to track all orders, whether created by a customer service representative, an agent through the call center, or by themselves through the web.

Order Capture Self Service works in conjunction with the following CRM features, some of which are common to all self service applications, and others that specifically complement Order Capture Self Service:

- Security elements, including definition of user roles and associated permissions.
- Address book.
- Sign in.
- Registration.
- Profile maintenance.
- Contact Us and Chat.
- Attributes.
- Product catalog.
- Search Catalog.
- PeopleSoft Advisor.
- PeopleSoft Configurator.

---

**Note.** Functionality that is common to both Order Capture and Order Capture Self Service, such as integration with order fulfillment, pricing, freight, and tax integration, is documented in previous chapters of the this book.

---

**See Also***PeopleSoft Enterprise Real-Time Advisor CRM 9 PeopleBook**PeopleSoft Enterprise Advanced Configurator 9 PeopleBook*

---

## Understanding Delivered User ID, User Role Identification, and Password Creation

This table shows the users and roles that Order Capture Self Service delivers. You can adopt these particular users and roles, or you can modify them to better suit your business needs.

**Note.** To modify permissions for these delivered user roles, navigate to PeopleTools, Security, Permissions & Roles, Roles.

User ID	Role Name	Role Description	Access
GUEST	Guest	An anonymous user that accesses the web channel.	Guests have access to the Sign In & Registration, Products and Services, Catalog Search, Shopping Cart, and Site Selection pages.
CPSS, CPSS2	Consumer	A consumer that represents him- or herself.	Consumers have guest privileges without the sign-in (and registration) options. They also have access to the Customer Care, Order Status, Quote Status, Profile Maintenance, and Contact Us pages.
CPCUST, CPCUST2	Customer	A customer represents a single customer.	Customers have all consumer privileges as well as quick entry privileges.
CPBRKR, CPBRKR2	Broker	A broker represents multiple customers.	Brokers have all customer privileges plus customer selection privileges. Customer selection privileges allow brokers to select the customer that they want to represent for a particular session.

---

**Note.** User IDs that end with a 2 are associated with setID CRM01.

---

## Setting Password Expiration and Changing Passwords

To set the internal self-service password expiration date to one other than the external date, navigate to Set Up CRM, Security, Self-Service, User Registration.

The password expiration options are accessed in the Password Security Policies group box of the User Registration page. The options enable you to setup your password expiration policy. For example, the internal passwords might be set to expire every 60 days while the setting for the external passwords might be set to never expire. In the Password Security Policies group box a password can be set to never expire by selecting the password Never Expires radio button, or the password can be set to expire by selecting the *Password Expires* radio button and entering the number of days until expiration in the associated field. A password expiration date is calculated based on the last password change date as determined from the tools PSOPRDEFN table.

When the password expires and you click the Sign In button on the Sign In page, you are presented with the Change Password page. Here you enter your old password, your new password and enter the new password again to confirm it. Click the Save button or if it becomes necessary, you can cancel and return to the sign in page.

---

## Self-Service Pages

Order Capture Self Service delivers these customer-facing pages for self-service order creation and management. They are enabled by the Order Capture Self Service product as part of the PeopleSoft CRM Portal Pack:

- Find Products page (RX\_PROD\_SRCH)
- Shopping Cart page (RE\_CART).
- Order Status page (RE\_ORDER\_SRCH)
- Quote Status page (RE\_QUOTE\_SRCH)
- Contact Us (WC\_CONTACT\_US)
- Product Registration page (RF\_PROD\_REG\_SRCH)

---

## Selecting Products

This section discusses how to:

- Find products.
- Choose a product.
- View product details.
- Compare products.
- Launch PeopleSoft Advisor.

## Pages Used to Select Products

Page Name	Object Name	Navigation	Usage
Find Products	RX_PROD_SRCH	Find Products	Search a particular catalog or browse all catalogs, get advice on products.
Browse Catalog	RB_CATALOG	On the Find Products page, click a catalog link in the Browse Catalog group box.	View and select a product.
Product Details	RB_PROD_DTL	On the Catalog page, click a product link.	View product details, select a quantity, change units of measure, and add the product to the shopping cart.
Product Comparison	RB_CATALOG	On the Catalog page, select up to three Compare check boxes. Click the Add to Compare Pad button.	Compare as many as three products. <b>Note.</b> Some functionality for the Compare Pad will differ based on your installation.
PeopleSoft Advisor	RAD_ADVISOR_RUN	On the Find Products page, click the Get Advice link.  On the Catalog page, you can also click the Need help choosing a product? link.	Launch the PeopleSoft Advisor, answer the questions in the dialog presented and receive a personalized recommendation.

## Finding Products

Access the Find Products page.

### Find Products

**Search Catalog**

Catalog

Keywords

Region ID

[Advanced Search](#) [Search Tips](#)

**Catalog Tree**

First | Previous | Next | Last | Left | Right

- [Backpacks](#)
- [Clothing Catalog](#)
- [Biking Accessories Catalog](#)
- [Child Carriers](#)
- [Camping Shelters](#)
- [Camping Accessories](#)
- [Camping Catalog](#)
- [Camping Shelters](#)
- [Skiing Catalog](#)
- [Fishing Catalog](#)
- [Mountain Climbing Catalog](#)
- [Tech Catalog](#)
- [Outdoors](#)
- [Apparel](#)

**Catalog Search Results**

Search Results [View All](#) First 1-5 of 10 Last

Select	Description	Catalog
<input type="checkbox"/>	<a href="#">4 Season Convertible Tent</a> PeopleGear is excited to offer the 4 Season Convertible Tent for the first time. This is the latest model available and is l...	Camping Shelters
<input type="checkbox"/>	<a href="#">Gamma3 Mountain Tent</a> PeopleGear is excited to offer the Gamma3 Mountain Tent for the first time. This is the latest model available and is loaded...	Camping Shelters
<input type="checkbox"/>	<a href="#">Outlook 4000 3 Person Tent</a> PeopleGear is excited to offer the Outlook 4000 3 Person Tent for the first time. This is the latest model available and is ...	Camping Shelters
<input type="checkbox"/>	<a href="#">775-fill Mummy Sleeping Bag</a> PeopleGear is excited to offer the 775-fill Mummy Sleeping Bag for the first time. This is the latest model available and is...	Camping Shelters
<input type="checkbox"/>	<a href="#">3 Season Mummy Bag, Regular</a> PeopleGear is excited to offer the 3 Season Mummy Bag, Regular for the first time. This is the latest model available and is...	Camping Shelters

Find Products page

This page provides several methods to find products.

- Click the Get Advice link when you are unsure of the product or type of product that you need. The system will guide you in selecting the appropriate item through an Real-Time Advisor dialog consisting of a series of questions and answers.
- The system can display recommended products based on your prior ordering activity.
- Select and search a particular catalog. When you have enough information to provide definitive search criteria, use the Advanced Search link to search on keys such as keywords, brand name, description, and product ID.
- Select catalog links to browse listed catalogs.

## Choosing a Product

Browse the catalog using the Page link to view the pages of the catalog.

<b>Select</b>	Select check boxes for up to three products. Click the Compare Selected Items button.
<b>Compare Selected Items</b>	Click this button to display the attributes of up to three products side-by-side in the compare pad. The compare pad content is determined by a display template that is set up for the product catalogs.  Some functionality for the Compare Pad will differ based on your installation.
<b>Need help choosing a product?</b>	Click to launch PeopleSoft Real-Time Advisor, which displays a form with questions about your product requirements, then returns product recommendations based on your answers.
<b>Featured Product</b>	The system can highlight various products and distinguish them as featured products in the various catalogs.  However, you can click any product link to access its Product Detail page. For example, if you click the Walk-In Freezer 5' 10' x 11' product link, you can access the Product detail page for this product as well as its associated agreements and enhancements.

## Viewing Product Details

Access the Product Detail page.

**Product Detail**

[Catalogs](#) >> 4 Season Convertible Tent

[Product Details](#)

---

**4 Season Convertible Tent**



**Product ID** 10032

**Price** \$50.00

**Unit** Each

[↔ Back to Compare Pad](#)

[↶ Cancel and Return to Catalog](#)

**Product Description**

---

PeopleGear is excited to offer the 4 Season Convertible Tent for the first time. This is the latest model available and is loaded with new features. Order one today during our special limited time offer. They will not last long at this price!

Product Detail page (1 of 2)

### Similar Products



[Gamma3 Mountain Tent](#)



[Outlook 4000 3 Person Tent](#)

### Enhance this product with these additions



[Butane Lantern](#)



[Ice Chest, 20 Qt.](#)



[Outback Compass](#)

### Dimensions

Attribute Name	Attribute Value
Height	4 feet
Length/Depth	8 feet
Width	3 feet

### Materials

Attribute Name	Attribute Value
Material	Nylon
Stitching	Water-Proof

Product Detail page (2 of 2)

**Agreements for this product and Enhance this product with these additions**

Click to display links for additional item information, such as preventive maintenance, service agreements, and enhancements for the selected product. Click the item links for more information.

**The next step up from this product**

Select this link to display products that are considered a step up from the product you are currently considering—perhaps for quality, size, or capacity.

---

**Note.** You can access Product Details from several pages, including the Catalog, Shopping Cart, Checkout, and Order/Quote Status pages.

---

## Comparing Products

Access the Product Comparison page.

**Browse Catalog**

[Catalog](#)

**Product Comparison**

You may select products from one of our catalogs.

**Side by Side Comparison**

	4 Season Convertible Tent	Gamma3 Mountain Tent	Outlook 4000 3 Person Tent
			
<b>Price</b>	\$299.0000	\$325.0000	\$359.0000
<b>Product Description</b>	PeopleGear is excited to offer the 4 Season Convertible Tent for the first time. This is the latest model available and is loaded with new features. Order one today during our special limited time offer. They will not last long at this price!	PeopleGear is excited to offer the Gamma3 Mountain Tent for the first time. This is the latest model available and is loaded with new features. Order one today during our special limited time offer. They will not last long at this price!	PeopleGear is excited to offer the Outlook 4000 3 Person Tent for the first time. This is the latest model available and is loaded with new features. Order one today during our special limited time offer. They will not last long at this price!
<b>Unit of Measure</b>	Each	Each	Each
	<a href="#">Details</a>	<a href="#">Details</a>	<a href="#">Details</a>
	<a href="#">Remove</a>	<a href="#">Remove</a>	<a href="#">Remove</a>
<b>Dimensions</b>			
<b>Height</b>	4 feet	8 feet	
<b>Length/Depth</b>	8 feet	15 feet	
<b>Width</b>	3 feet	4 feet	
<b>Materials</b>			
<b>Material</b>	Nylon	100% Nylon	
<b>Stitching</b>	Water-Proof	Water-Proof	

Product Comparison page

**Add to Cart**

Add the product to your shopping cart.

**Remove**

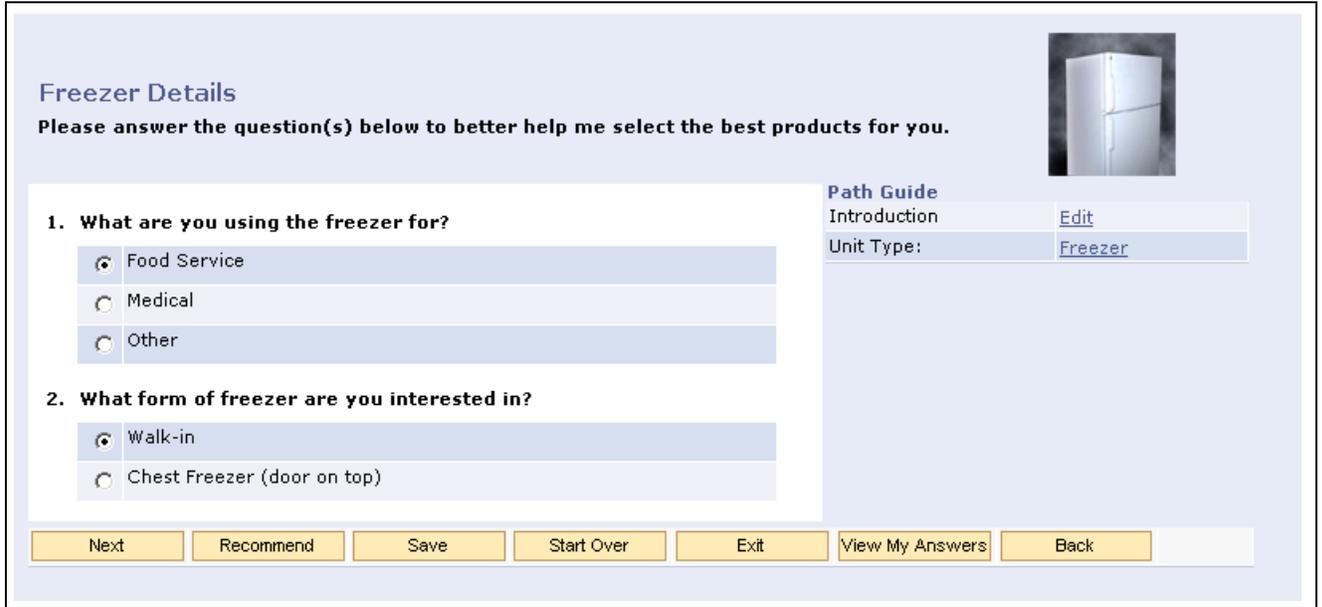
Click to remove a product from the current comparison. In order to facilitate cross catalog comparisons, products stay on the compare pad until they are removed.

**Return to Catalog**

Click to return to the catalog to add additional products to the comparison. The compare pad can display up to three products in a comparison. Remove any products that should no longer be compared.

# Launching PeopleSoft Real-Time Advisor

Access the PeopleSoft Advisor page.



PeopleSoft Advisor page

- Next** After selecting or entering your applicable response, click to move to the next dialog in the series of the advisor’s questions.
- Recommend** Click to access the list of product recommendations that the Advisor generated based on your answers to the advisor dialog.
- Save** Click to save your responses to complete or modify at another time.

## Recommendations

Select the Recommend button on the Advisor page.

### Recommendations

**Here is a list of the refrigerators/freezers that I believe will best meet your needs. You can compare units or view the details of a particular unit. Once you've decided which one to purchase, you can add that unit to your order.**



Compare	Product	Details	Score
<input type="checkbox"/>	<a href="#">Custom Build Freezer</a>	Product ID: SR2900 Appliance Usage: ALL Category: WALK-INS Freezer Flooring: CUSTOM Freezer Lighting: CUSTOM Catalog Product Group: WALK-INS List Price:	<b>100</b>
<input type="checkbox"/>	<a href="#">Sectional Walk-in Freezer</a>	Product ID: SR3000 Appliance Usage: ALL Category: WALK-INS Freezer Flooring: CUSTOM Freezer Lighting: CUSTOM Catalog Product Group: FREEZER List Price:	<b>100</b>
<input type="checkbox"/>	<a href="#">Walk-In Freezer 5' 10' x 11'</a>	Product ID: SR2000 Appliance Usage: ALL Category: WALK-INS Freezer Flooring: EPOXY Freezer Lighting: HALO Catalog Product Group: WALK-INS List Price:	<b>76</b>

PeopleSoft Advisor – Recommendations page

**Score** The system displays suitable products with scores based on how well these products fit your responses to the advisor's questions.

## Using Quick Order Entry

This section provides an overview of Quick Order Entry and discusses how to select products quickly.

### Understanding Quick Order Entry

There are two ways to add products to the shopping cart: from the Product Details page or from Quick Order Entry page. Quick Order Entry is intended for users who are familiar with the products and the product IDs that they order. Quick Order Entry delivers a simple form to support speedy entry of product information.

### Page Used for Quick Order Entry

Page Name	Object Name	Navigation	Usage
Quick Order Entry	RE_QUICK_ENTRY	Click the Quick Order Entry link on the Main Menu.	Create orders or quotes rapidly when you are familiar with the product and already know the product ID.

### Selecting Products Quickly

Access the Quick Order Entry page.

### Quick Order Entry

Enter the product IDs and all known information. Missing fields will be defaulted.

Product ID	Quantity	Units	Notes
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

 [Clear Form](#)
 [Show More Entries](#)

[Add to Cart](#)

Quick Order Entry page

<b>Product ID</b>	Enter the product ID.
<b>Quantity</b>	Enter a quantity. If you do not select a quantity, the system assigns the default quantity <i>1</i> .
<b>Units</b>	Enter either the unit of measurement (UOM) code (such as <i>ea.</i> ) or the UOM description (such as <i>each.</i> )
<b>Notes</b>	Add notes, which appear for the specified product when you access the shopping cart.

---

## Using the Shopping Cart

This section provides an overview of the shopping cart and discusses how to:

- Work from within the shopping cart.
- Delete products from the shopping cart.
- Add notes or attachments.

### Understanding the Shopping Cart

The shopping cart displays all of the products that you select for an order or quote. You can perform these operations from the Shopping Cart page:

- Update quantity and recalculate price.
- Configure products or packages.
- Add notes and attachments to an order.
- Remove products.
- Proceed to checkout.

## Pages Used to Access the Shopping Cart

Page Name	Object Name	Navigation	Usage
Shopping Cart	RE_CART	<p>Quick Order Entry Click the Add to Cart button.</p> <p>Find Products, Select product Click Add to Cart.</p> <p>Checkout Select the Change Order link.</p> <p>Shopping Cart page, click the Checkout button. (CRM Portal Pack must be installed to display the Checkout page.)</p>	View the contents of the shopping cart, and then proceed to checkout.
Notes & Attachments	RE_NOTES	<p>Shopping Cart, Add Notes &amp; Attachments</p> <p>Notes &amp; Attachment link</p>	Add a note or an attachment to the products that are being ordered.

## Working from Within the Shopping Cart

Access the Shopping Cart page.

### Shopping Cart

Click Checkout to specify shipping and payment information.

**Product Information**

Product	Product ID	Qty	Units	Price	
<b><a href="#">Add an Agreement to this Product</a></b>					
<a href="#">Custom Build Freezer</a> Custom-built Walk-In is built to order based on yo...	SR2900	<input type="text" value="1"/>	Each	\$4873.05	<a href="#">Delete</a>
<a href="#">Freezer Shelves</a> These shelves are compatible with all of our walk-...	10019	1	Each	\$99.00	
<a href="#">GBI IntelliAIRE Thermostat</a> The GBI IntelliAIRE is an advanced microprocessor-...	10020	1	Each	\$145.00	
<a href="#">Replacement Compressor</a> Replacement Compressor for Walk In Freezers....	10022	1	Each	\$254.05	
<a href="#">Freezer Door Options</a> Custom Freezer Door Specs...	SR05001	1	Each	\$0.00	
<a href="#">Freezer Door 34in x78in</a> Freezer Door 34in x78in...	SR2220	1	Each	\$2393.00	
<a href="#">Freezer Footprint Options</a>	SR2050	1	Each	\$0.00	
<a href="#">Freezer Footprint 7'9"x11'7"</a> Freezer Footprint 7'9"x11'7"...	SR2952	1	Each	\$1982.00	

If you have made changes, click Recalculate for new totals.

Recalculate

**Billable Charges**

<b>Subtotal</b>	\$4873.05 USD
-----------------	---------------

Checkout

Continue Shopping

Shopping Cart page

Click the product's name to view product details.

**Add an Agreement to this Product**

Click if you choose to add available agreements, such as a consulting, preventive maintenance, or service agreement for a selected product. Because it is often crucial that certain agreements be ordered with the initial purchase of a product, this is a second opportunity to choose agreements. This option is first presented on the Product Details page.

**Qty (quantity)**

Update the quantity of a product.  
 Click the Recalculate button to determine new total charges.

**Delete**

Click this link to remove the line item from the shopping cart.  
 Click the Recalculate button to determine new total charges.

---

**Note.** Deleting a product also deletes its associated agreements. However, Enhancements are not automatically deleted. Delete them individually using the Delete link on the Shopping Cart page.

---



Click the Options button to select options for a product that is set up as a dynamic package with various options that you must choose, such as when a product must be custom-built. When you have configured the product with its various options, the system calculates a composite price. This icon is not available or applicable to all products.

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



Click the Configure button to launch a dedicated product configuration application for the product. This application allows the configuration of complex products that have multiple sets of options that vary dynamically as the customer makes selections. This icon is displayed only when applicable and is not available for all products.

See Oracle CZ Implementation Guide and CRM Advanced Configurator 9 PeopleBook

### **Recalculate**

Click the Recalculate button to update the price after changes to your selections, such as increasing or reducing the quantity of a product or after removing a product.

### **Checkout**

Proceed to checkout.

### **Continue Shopping**

Return to the catalog to select additional or different products. When you click the Continue Shopping button, the system retains the contents of your shopping cart.

---

**Note.** When you have a configurable product or package in the shopping cart, it must be configured before you proceed to checkout. If a product has required attributes, you must specify the attribute value before you can proceed to checkout.

---

## **Adding Notes or Attachments**

Access the Notes & Attachments page.

**Shopping Cart**

**Notes & Attachments**

Enter notes and attach files for the product. Click Save when you are done.

**Notes**

**Men's Long Sleeve Bike Jersey (10000)**

**Summary**

Enter a subject title for your note.

**Details**

Enter any special instructions for this product.

Click "Attach a File" to select the file to attach from your computer.

[Cancel and Return to Shopping Cart](#)

Notes & Attachments page

## See Also

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

## Managing Checkout

This section discusses how to:

- Manage shipping, product, and payment options from the Checkout page.
- Handle multiple shipments.
- Access and change product attributes.
- Receive an order or quote confirmation.
- Change a submitted order derived from a quote.

## Pages Used to Manage Checkout

Page Name	Object Name	Navigation	Usage
Checkout	RE_SUMMARY	Shopping Cart, click the Checkout button.	Enter and modify shipping, product, and payment information.
Multiple Shipments	RE_DESTINATION	Checkout, Multiple Shipments button	Create more than one shipment destination for the order.
Notes & Attachments Summary	RE_NOTE_SUMMARY	Checkout: Shipments and Payments, click the View Notes & Attachments link.  Order/ Quote Details, click the View Notes & Attachments link.	Displays a list of notes and attachments associated with the order.
Attributes	RE_ATTR_RUNTIME	Checkout, click the Attributes link of a product line.	Enter product attributes where attributes are allowed for a product.
Order/Quote Confirmation	RE_STATUS	Checkout, click the Submit Order button or the Save as Quote button.	Send the completed order or quote to the enterprise system for processing and, in the case of an order, fulfillment. The system displays a confirmation message if the submission is successful.
Order Change	RX_PROCEED_CONFIRM	Checkout, click the Change Order link (from a quote).	Change an order that was derived from a quote. When you change an order, all special pricing for quotes is lost.

## Managing Shipping, Product, and Payment Options from the Checkout Page

Access the Checkout page.

### Checkout

## Shipping and Payment

Verify the order and enter payment information. Click Submit Order to process order and receive the order confirmation.

[Submit Order](#)
[Save as Quote](#)
[Change Order](#)

#### Shipment

##### Shipping Address

Jack Pepper  
Shoreview Medical  
2455 Augustine Drive  
Santa Clara, CA 95054  
United States

[Change Address](#)

---

##### Service Address

No address selected

[Change Address](#)

[Multiple Shipments](#)

##### Shipping Options

**Select Shipping Method**

DHL Airways ▼

**Requested Arrival Date**

<sup>31</sup> (example: 06/04/2004)

Would you like all of your products shipped as they become available or in a single shipment?

**Single Shipment**

**Ship as Items Available**

Checkout page (1 of 3)

#### Product Information

Product	Product ID	Qty	Units	Price
<a href="#">Walk-In Freezer 5' 10' x 11'</a> Our cooler solution handles temperatures below fre...	SR2000	2	Each	\$10825.92
<a href="#">Ice Burg Freezer PM Service</a> Keep your Cold Storage Equipment Ice Burg Cold wit...	WS4000		Each	\$880.00
<b>Service Agreement for Walk-In Freezer 5' 10' x 11'</b>				

#### Total Charges

##### Billable Charges

<b>Subtotal</b>	\$11705.92	USD
<b>Discount</b>	\$0.00	USD
<b>Surcharge</b>	\$0.00	USD
-----		
<b>Total</b>	\$11705.92	USD

If you have made changes, click Recalculate for new totals.

[Recalculate](#)

#### Invoice Payment Info

You may enter a PO number below for your own tracking purposes.

**Customer PO**

**Payment Terms** Due in 30 Days

Checkout page (2 of 3)

**Credit Card Payment Info**

Enter your Credit Card information below.

**Credit Card Type**

**Credit Card Number**

**Expiration Month**  **Expiration Year**

**First Name on Card**

**Last Name on Card**

**Billing Address Information**

**Billing Address**

Jack Pepper  
 Shoreview Medical  
 2455 Augustine Drive  
 Santa Clara, CA 95054  
 United States

 [Change Address](#)

**Order Notes**

Submit Order
Save as Quote
 [Change Order](#)

Checkout page (3 of 3)

## Shipment

### Multiple Shipments

Click to access the Multiple Shipments page and send the products contained in the order to different locations or by way of different shipping methods. This assumes that there is more than one product. To create multiple shipments for the same product, enter the product and appropriate quantity into the cart twice.

### Product Information

Click a product link to view product details. On the Product Details page, you can change quantity or view or configure a configurable product, or view and change attributes for a product with attributes.

### Invoice Payment Info (invoice payment information) and Credit Card Payment Info (credit card payment information)

Enter a purchase order number if you are paying by invoice. Enter an account number if you are ordering a service that can be billed to a service account, such as a cable television account. Enter credit card information if payment is by credit card.

---

**Note.** The payment method that displays is based on the defined customer or consumer as well as the preferred payment method that is established on the customer's or consumer's record.

---

### Submit Order

Click to submit the order for processing. You receive an order confirmation.

### Save as Quote

Click to save as a quote. You receive a quote confirmation.

### Change Order

Click to return to the shopping cart and make changes.

## Shipping Options

<b>Change Address</b>	Change the shipping, service, or billing address.
<b>Select Shipping Method</b>	Choose a preferred carrier from the drop-down list.
<b>Single Shipment</b>	Select to prevent partial shipments of this order.
<b>Ship as Items Available</b>	Select to allow partial shipments.

---

**Note.** Partial shipments may increase freight charges.

---

## Handling Multiple Shipments

Access the Multiple Shipments page.

If there are two or more order lines in the shopping cart, you can divide shipments.

To divide shipments:

1. Select the product that you want to designate for a separate shipment on the Multiple Shipments page.
2. Click the New Shipment button to request a new shipment.

---

**Note.** You cannot split a single line consisting of more than one quantity of a single item into two shipments. Also, you cannot ship components of a single package separately.

---

## Accessing and Changing Product Attributes

Access the Attributes page.

If available for that product, access the Attributes page by clicking on the Attributes icon next to a product.

Fields on the Attributes page are dynamic. You define the attributes that are necessary for the products that you sell. Attributes are an optional feature. Attribute groups allow you to associate a different set of attributes to different sets of products.

### See Also

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

## Receiving an Order or Quote Confirmation

Access the Order or Quote Confirmation page.

### Quote Confirmation

**Quote ID** CRQ0300079      **Status** Submitted

#### Shipment

**Shipping Address**

Jack Pepper  
Shoreview Medical  
2455 Augustine Drive  
Santa Clara, CA 95054  
United States

**Shipping Options**

---

**Shipping Method**

DHL Airways

**Product Information**

Product	Product ID	Qty	Units	Price
<a href="#">Wine and Beverage Refrigerator</a> Fashioned of rugged stainless steel, it keeps your...	D9998	1	Each	\$1080.00

**Total Charges**

Billable Charges	
<b>Subtotal</b>	\$1080.00 USD
<b>Discount</b>	\$0.00 USD
<b>Surcharge</b>	\$0.00 USD
<b>Total</b>	\$1080.00 USD

Quote Confirmation page

**Product Information**

Click the product link to return to the Product Detail page where you can click the Order Again button to place another order or click the Return to Order Status button to access the Order Details page again.

## Changing a Submitted Order Derived from a Quote

Access the Order Change page

**Checkout**

**Order Change**

Warning: Making changes to your quote can result in the entire order being re-priced.

Yes - Proceed

No - Do Not Proceed

Order Change page

**Yes - Proceed**

Click this button to proceed in making changes to an order that has been submitted from a quote.

---

**Note.** Making changes in an order submitted from a quote can result in the entire order being repriced.

---

## Viewing Order or Quote Status

This section discusses how to:

- Search for orders.
- View order details.
- Search for quotes.
- View quote details.
- Convert a quote to an order.
- Track orders.

### Pages Used to View Order or Quote Status

Page Name	Object Name	Navigation	Usage
Order Status	RE_ORD_SEARCH	Order Status.	Search for orders in the system.
Order Details	RE_STATUS	Order Status, Click on an Order.	View line information for orders. You can also copy this order to the shopping cart.
Quote Status	RE_QUO_SEARCH	Quote Status.	Search for quotes in the system.
Quote Details	RE_STATUS	Quote Status, Click on a Quote.	View line information for quotes. You can also convert this quote to an order.

### Searching for Orders

Access the Order Status page.

### Order Status

Orders for the last 30 days are shown.  
Click the order number to see order details.

#### Order Status Search Criteria

Order Date Between  31 And  31

[Advanced Search](#)

#### Orders

Order ID	Order Date	Status	Total Price
<a href="#">OC00649</a>	06/04/2004	Submitted	\$1080.00
<a href="#">OC00648</a>	06/04/2004	Submitted	\$900.00
<a href="#">OC00647</a>	06/04/2004	Submitted	\$1080.00
<a href="#">OC00646</a>	06/04/2004	Submitted	\$1080.00
<a href="#">OC00645</a>	06/04/2004	Submitted	\$5412.96
<a href="#">OC00644</a>	06/04/2004	Submitted	\$1980.00
<a href="#">OC00643</a>	06/03/2004	Submitted	\$89.10

Order Status page

---

**Note.** Either the Order Status or the Quote Status page becomes available when you click the Advanced Search link.

---

Contact Us information is associated with the business unit. You can modify it or remove it from display during setup.

**Search** Click to search by date.

**Advanced Search** Click the Advanced Search link to search for orders by date, order ID, customer PO, and order status.

**Order Status** Search for orders using advanced search by entering one of these order status conditions:

- Cancelled
- Complete
- Expired
- Generating

---

**Note.** This status indicates that the Business Project is in the process of creating the individual orders. Only a *master* bulk order can have this status.

---

- Hold
- In Fulfillment

---

**Note.** *In Fulfillment* status indicates an order that is being processed to be shipped or provisioned.

---

- New
- Partial Hold
- Submitted

**Order ID** Click the order link to access the Order Details page.

## Viewing Order Details

Access the Order Details page.

[Order Status](#)

**Order Details**

---

**Order ID** OC00649
**Status** Submitted

**Shipment**

**Shipping Address**

Jack Pepper  
Shoreview Medical  
2455 Augustine Drive  
Santa Clara, CA 95054  
United States

**Shipping Options**

---

**Shipping Method**

DHL Airways

**Product Information**

Product	Product ID	Qty	Units	Price
<a href="#">Wine and Beverage Refrigerator</a> Fashioned of rugged stainless steel, it keeps your...	D9998	1	Each	\$1080.00

**Total Charges**

Billable Charges		
<b>Subtotal</b>	\$1080.00	USD
<b>Discount</b>	\$0.00	USD
<b>Surcharge</b>	\$0.00	USD
-----		
<b>Total</b>	\$1080.00	USD

Order Details page (1 of 2)

Invoice Payment Info
<p style="text-align: center;"><b>Customer PO</b></p> <p style="text-align: center;"><b>Payment Terms</b> Due in 30 Days</p>
Billing Address Information
<p><b>Billing Address</b></p> <p>Jack Pepper Shoreview Medical 2455 Augustine Drive Santa Clara, CA 95054 United States</p>
<p>Allows you to copy this order to the shopping cart. You will still be able to add or remove products from the new order before checking out.</p> <p style="text-align: center;"><a href="#">Order Again</a></p>

Order Details page (2 of 2)

**Note.** To view order details for orders that originated externally, an external link must be defined on the Order Capture Setup Workbench.

<b>Order ID</b>	Displays the PeopleSoft Order number or quote number.
<b>Status</b>	Displays the current status of the order or quote.
<b>Shipment</b>	Displays shipment information and links for tracking orders. When you click the Track Shipment link, you transfer to the shipment provider, where you can view the status of your packages.
	<p><b>Note.</b> Information is available only for orders that have a shipment and a PRO_NUMBER defined to a web site, such as for United Parcel Service (UPS) or Federal Express (FEDEX.)</p>
<b>Product</b>	Click the product link to view product details.
	<p><b>Note.</b> Depending on the fulfillment system with which your system integrates, products or packages within packages may display their statuses individually and not as a package.</p>
<b>Order Again</b>	Click to copy this order to the shopping cart.
	<p><b>Note.</b> Your original order does not change.</p>

## Searching for Quotes

Access the Quote Status page.

### Quote Status

Quotes for the last 30 days are shown.  
Click the quote number to see quote details.

#### Quote Status Search Criteria

Quote Date Between   And

[Advanced Search](#)

Quote ID	Quote Date	Status	Total Price	Quote Due Date	Expiration Date
<a href="#">CRQ0300086</a>	06/04/2004	Submitted	\$1377.00	06/19/2004	07/04/2004
<a href="#">CRQ0300085</a>	06/04/2004	Submitted	\$900.00	06/19/2004	07/04/2004
<a href="#">CRQ0300084</a>	06/04/2004	Submitted	\$5412.96	06/19/2004	07/04/2004
<a href="#">CRQ0300083</a>	06/04/2004	Submitted	\$1080.00	06/19/2004	07/04/2004
<a href="#">CRQ0300082</a>	06/04/2004	Submitted	\$5412.96	06/19/2004	07/04/2004
<a href="#">CRQ0300081</a>	06/04/2004	Submitted	\$1980.00	06/19/2004	07/04/2004
<a href="#">CRQ0300080</a>	06/04/2004	Submitted	\$1080.00	06/19/2004	07/04/2004
<a href="#">CRQ0300079</a>	06/04/2004	Submitted	\$1080.00	06/19/2004	07/04/2004
<a href="#">CRQ0300078</a>	06/04/2004	Submitted	\$1080.00	06/19/2004	07/04/2004
<a href="#">CRQ0300077</a>	06/04/2004	Submitted	\$1080.00	06/19/2004	07/04/2004
<a href="#">CRQ0300076</a>	06/03/2004	Hold	\$10825.92	06/18/2004	07/03/2004
<a href="#">CRQ0300075</a>	06/03/2004	Submitted	\$5852.96	06/18/2004	07/03/2004

Quote Status page

**Quote Due Date** Displays the date on which the quote must be captured before the quote automatically expires.

**Expiration Date** Displays the date after which the quote is no longer valid.

---

**Note.** Advanced search criteria for *quote* status are slightly different from advanced search criteria for *order* status in that the criteria can entail quote due date and expiration date parameters.

---

## Viewing Quote Details

Access the Quote Status page.

Click a quote ID link in the Quotes section to view Quote Details.

## Converting a Quote to an Order

Access the Quote Details page.

Click the Submit as Order button on the Quote Details page to convert a quote to an order. You can add or remove products prior to conversion, but this causes the quote to lose its special pricing (if applied) and be repriced. Once you click the Submit as Order button, shipping and payment options are available on the checkout page and you can select shipping options, such as multiple shipments. You can also change the shipping destination, as well. Submitted quotes become Open orders.

## Tracking Orders

Access the Order Details page.

For a particular order, access the Order Details page from the Order Status page, then click the Order Tracking link that is a uniform resource locator (URL) to the third-party system. You can see the status of your packages. This link only appears when URL links for tracking are set up in advance.

---

**Important!** You can use the Order Status page to link to an order fulfillment system with the keys for that order. When you click the link, a fulfillment page appears that provides order status details. For example, a link to the PeopleSoft Order Management order status page provides real-time status from that particular fulfillment system.

---

## APPENDIX A

# Order Capture Delivered Business Processes and Web Services

This appendix discusses the delivered Business Process Execution Language (BPEL) business processes and web services, and provides guidelines on how to view message elements.

### See Also

*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Working with Business Processes and Web Services,” Understanding Web Services

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## Delivered Business Processes

This section discusses:

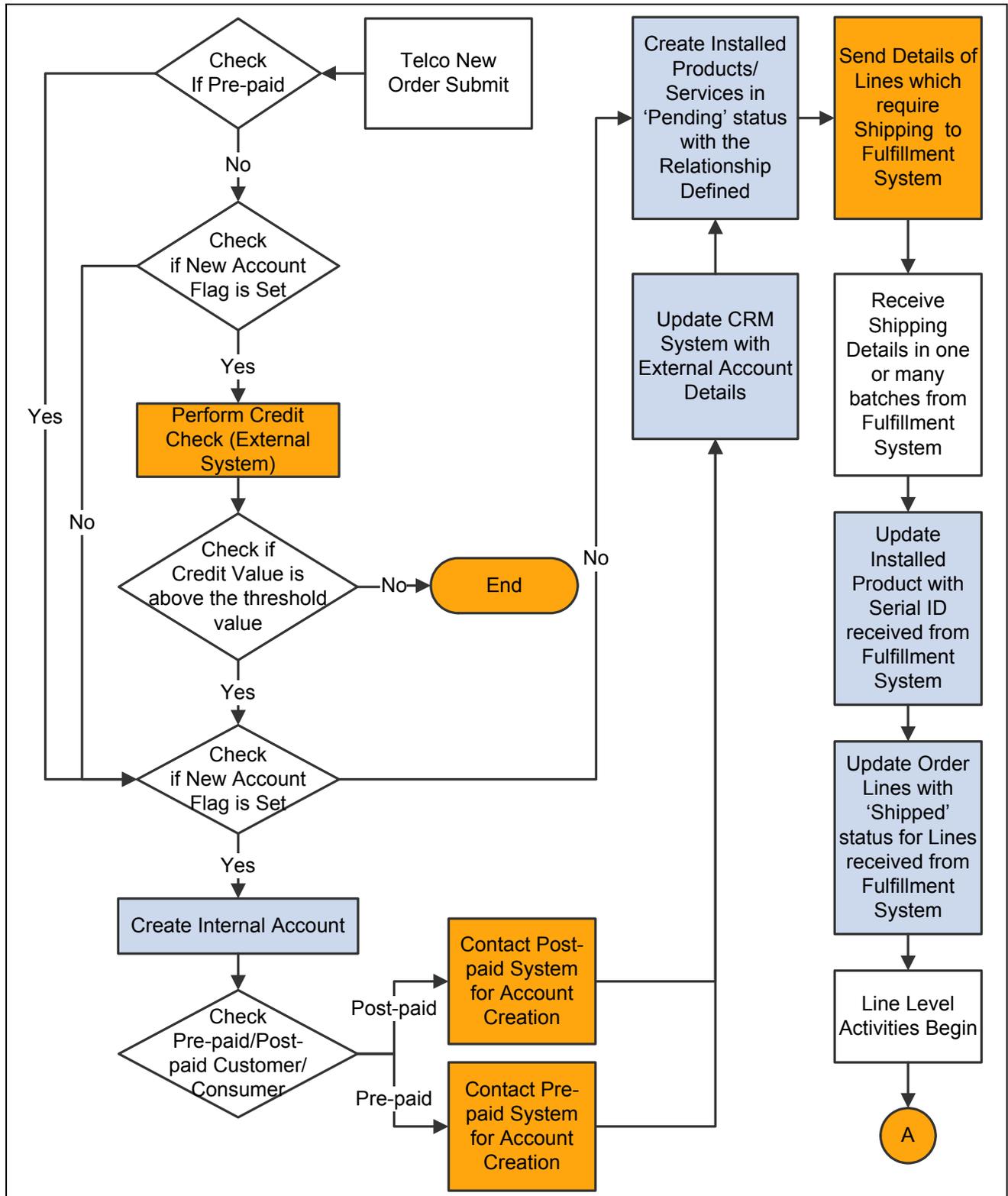
- Communications New Order process flow.
- Mobile Number Portability process flow.
- Change Service process flow.
- Prepaid to Postpaid Account Conversion process flow.
- Port Authorization Code (PAC) Request process flow.
- Service Management Activate Service process flow.
- Service Management Suspend Service process flow.
- Service Management Suspend and Change Service process flow.
- Service Management Resume Service process flow.
- Service Management Disconnect Service process flow.
- Lost or Stolen Handset process flow.
- Service Management Port In process flow.
- Use of sub and stub business processes in delivered business processes.

### Communications New Order Process Flow

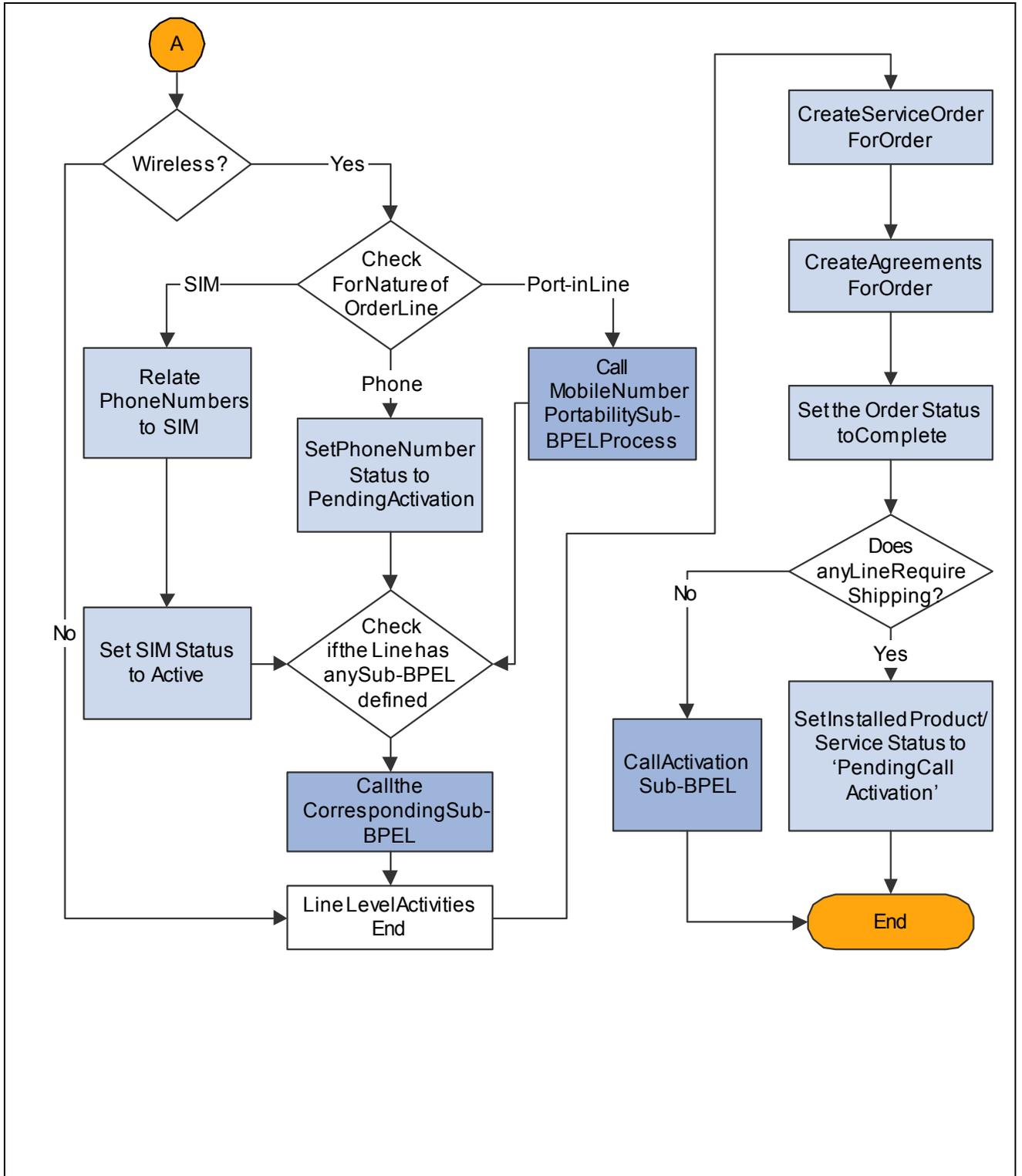
This process is initiated when an order for communications is created and submitted after passing through any holds.

Payload is created with order details in it and is passed onto this business process as part of the initiation process.

This diagram illustrates the *Communications New Order* process flow:



Communications New Order process flow (1 of 2)



Communications New Order process flow (2 of 2)

**Note.** If this is a storefront transaction, change the source from *Phone* to *Storefront* to ensure the correct New Order flow is used. A storefront order skips shipping and does not go to fulfillment.

When this business process is initiated, it:

1. Checks if this is a prepaid order.  
No credit check is required if it is a prepaid order.
2. Performs a credit check through an external web service call if it is a postpaid order and if a new account creation has been requested as part of the order.  
If the credit check does not meet the threshold value that is defined for the business process, the business process is terminated.
3. If the New Account option is enabled, creates an account in the CRM system through an internal web service call.  
This applies to both prepaid and postpaid accounts.
4. Creates an account in the prepaid or postpaid billing system, depending on whether this is a prepaid or postpaid account.  
The account creation is done through an external web service call.
5. Receives the response from the external billing system with the newly created account in the *Active* status.  
If the account is created with a nonactive status, the business process waits for a defined period of time for the account to become active.
6. Sends the account information to the CRM system through an internal web service call to update the order as well as the corresponding internal billing account.
7. Creates installed products for all products available in the order with the appropriate relationships through an internal web service call.
8. Cumulates the information for all the line items that require shipment.  
This information is published to an external fulfillment system through an external web service call.
9. Receives the shipment notice from the external fulfillment system.  
This notice can contain one or many lines. The business process waits for all the shipment information, which can be returned in multiple batches from the external system.
10. Updates the corresponding installed product (that is, the serial ID) for each received shipment notice.  
This is done through an internal web service call.
11. Updates the corresponding order line status to *Shipped* for each received shipment notice.
12. Performs these activities for each line item in the order if the nature of the product in the line item is *Wireless*:
  - If the category of the product is *SIM* (Subscriber Identity Module):
    - i. The process relates the corresponding phone numbers (which are related to the line item to which this SIM is associated) to this SIM, through an internal web service call.
    - ii. The SIM status is set to *Active*.
  - If the category of the product is *Phone*, the phone number status is set to *Pending Activation*.
  - If the line item has a port-in request, the *Mobile Number Portability* business process is invoked.  
After the completion of the *Mobile Number Portability* business process, the control is returned to this business process.

See [Appendix A, "Order Capture Delivered Business Processes and Web Services," Mobile Number Portability Process Flow, page 351](#).

- If the line item is associated with a sub-business process, a call to the subbusiness process is made and the control is returned to the main calling business process.

All line-level activities are completed.

13. Creates service orders for installed products, if applicable, through an internal web service call.
14. Creates an agreement for the order, if applicable, through an internal web service call.
15. Sets the order status to *Completed* through an internal web service call, which also sets the status of all lines to *Completed* if they are not already in the *Completed*, *Shipped*, or *Cancelled* status.
16. If any of the line items requires shipping, sets the status of the parent installed product to *Pending Call Activation* through an internal web service call, which also takes care of updating the status of all child installed products to *Pending Call Status*.
17. If no line items require shipping, invokes the *Service Management Activate Service* business process.  
After the *Service Management Activate Service* business process is completed, the control is returned to this main business process.

See [Appendix A, “Order Capture Delivered Business Processes and Web Services,” Service Management Activate Service Process Flow, page 361.](#)

The *Communications New Order* business process ends.

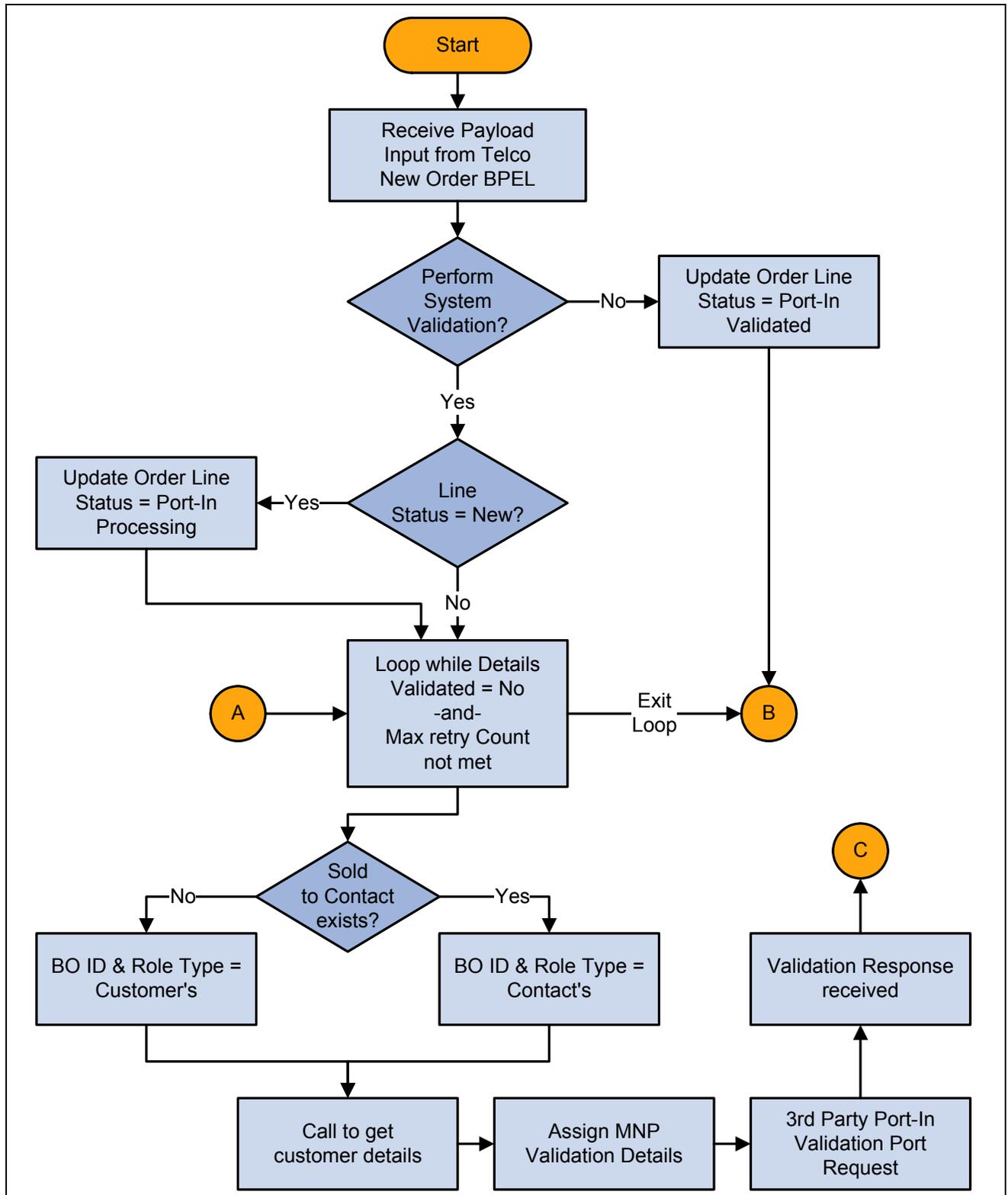
While this business process is in progress, a cancellation message is sent to it if the corresponding new order is being cancelled. When that happens, the business process terminates regardless of the stage it is in.

## Mobile Number Portability Process Flow

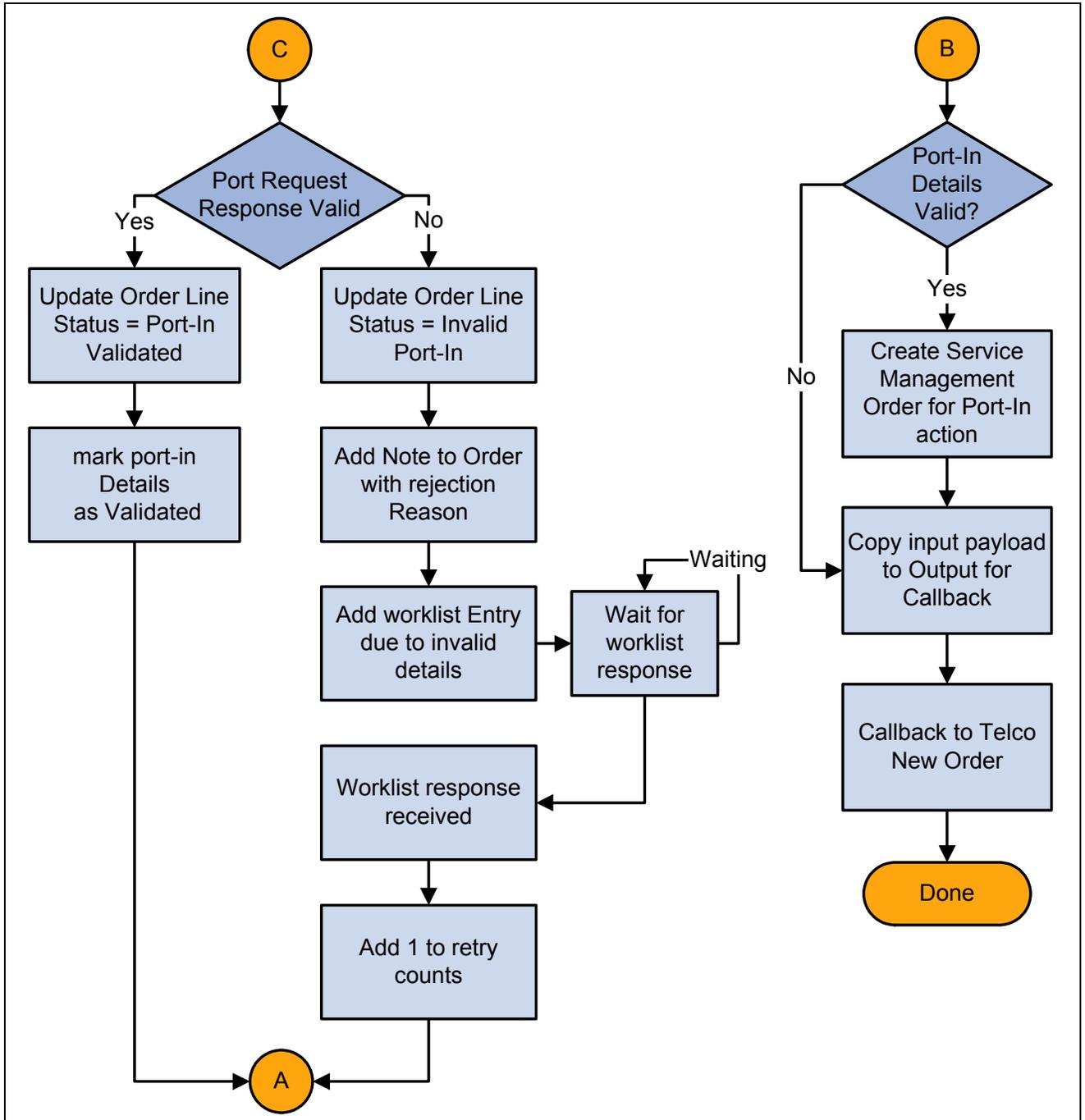
This process is typically initiated from the *Communications New Order* business process. For each port-in found on an order, an instance of this process exists. This process is responsible for validating the details provided for the port-in.

See [Appendix A, “Order Capture Delivered Business Processes and Web Services,” Communications New Order Process Flow, page 347.](#)

This diagram illustrates the *Mobile Number Portability* process flow:



Mobile Number Portability process flow (1 of 2)



Mobile Number Portability process flow (2 of 2)

When this business process is initiated from the *Communications New Order* business process it:

1. Examines the payload for the port-in details.  
 If the details indicate that a system validation is needed, the process calls a third-party service to validate the porting details. Otherwise, it assumes that the details are validated already.
2. If system validation is needed, sets the order line status to *1200 : Port-In Processing* if its current status is *1000 : New*.  
 This is accomplished by calling a delivered service operation.

A loop is performed until either the port-in details become valid or the maximum number of *Retry Attempts* (default = 3) is reached. Then it:

- a. Calls the RB\_CUSTOMER\_GET\_CUSTOMER (Get Customer Information) service operation of the delivered Customer web service to retrieve customer details.

If the order has a contact BO (business object) ID, the ID is used to obtain customer information. Otherwise, the customer BO ID is used.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, “Business Object Delivered Web Services”.

- b. Copies all needed customer details and payload data into the Port Request message.
- c. Calls the third-party web service (it is a placeholder that customers need to replace with their own web services) for the port-in request.

The purpose of this routine is to validate the details and respond with the validation results. This is an asynchronous call.

- d. Receives a response from the third-party system and checks for the validity of the details.
- e. If the details are valid, it:
  - i. Calls a delivered web service to update the order line status to *1230 : Port In Validated*.
  - ii. Returns to the top of the loop with the details marked as valid.
- f. If the details are invalid, it:
  - i. Calls a delivered web service to update the order line status to *1210 : Invalid Port-In*.
  - ii. Calls the RO\_SERVICEMGT\_ADDNOTE service operation to add a note with the validation message that is returned from the third-party system.
  - iii. Calls the CREATE\_WORKLIST\_ITEM service operation to add a worklist entry for this order, indicating that the port-in details are invalid.

At this point, the process waits until a manual update of the worklist item takes place, which typically happens after a customer service representative makes the necessary changes to the port-in details on the order and resubmits the order.

- iv. Increases the retry count by 1 after the worklist notification is received and returns to the top of the loop to try again.
3. If port-in details are valid, it calls the RO\_SERVICEMGT\_ADDSUBMIT service operation to create a service management order (with Port-In action) and have it submitted, which launches the *Service Management Port In* business process to continue the porting procedure.

See [Appendix A, “Order Capture Delivered Business Processes and Web Services,” Service Management Port In Process Flow, page 376](#).

4. Copies the input payload to the output data.
5. Notifies the *Communications New Order* business process that the *Mobile Number Portability* business process is complete.

The *Mobile Number Portability* business process ends.

---

**Note.** If the MNP order is cancelled, the status of the installed products does not change.

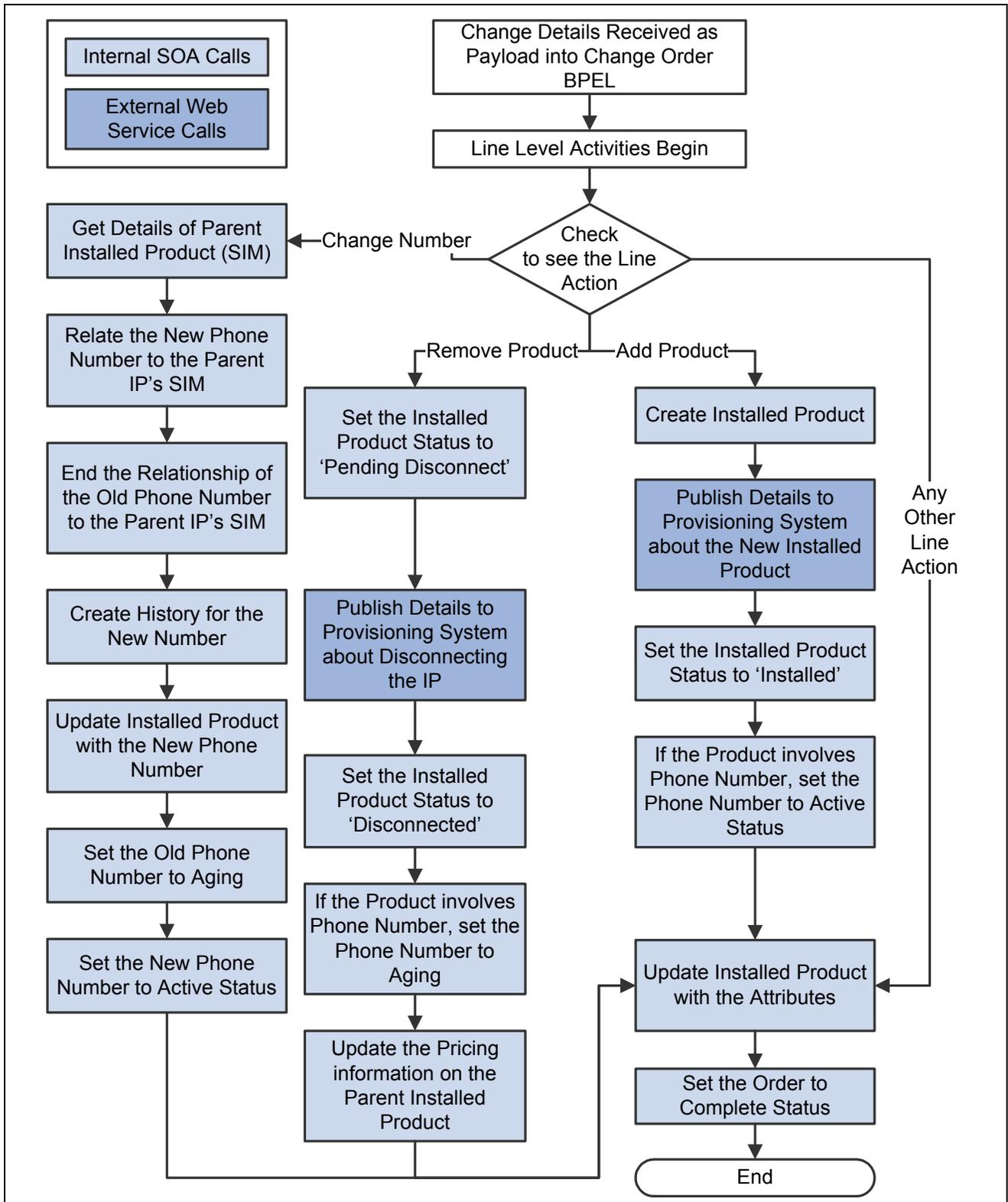
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## Change Service Process Flow

This process is initiated when a service management order for communications is created with a line action of *Change*. Also, it gets initiated from the *Service Management Suspend and Change Service* business process as a subbusiness process.

See Appendix A, “Order Capture Delivered Business Processes and Web Services,” Service Management Suspend and Change Service Process Flow, page 368.

This diagram illustrates the *Change Service* process flow:



Change Service process flow

When this business process is initiated, it:

1. Checks if the first line item of the service management order has an action of *Change* or *SuspendAndChange*.

---

**Note.** Steps 2 through 6 are line-level activities.

---

2. Checks the action of every line item other than the first one.
3. If line item action is of type *Change Number*, it:
  - Obtains the parent installed product details through an internal web service call.
  - Relates the new phone number to the SIM of the parent installed product.
  - Ends the relationship between the old phone number and the SIM of the parent installed product through an internal web service call.
  - Creates the history for new phone number through an internal web service call.
  - Updates the installed product for the product with the new phone number through an internal web service call.
  - Sets the status of the old phone number to *Aging* through an internal web service call.
  - Sets the status of the new phone number to *Active* through an internal web service call.
4. If line item action is of type *Remove Product*, it:
  - Sets the installed product status to *Pending Disconnect* through an internal web service call.
  - Publishes details to the external provisioning system about disconnecting the installed product through an external web service call.
  - Sets the installed product status to *Disconnected* through an internal web service call.
  - If the removed product has a phone number, sets the phone number status to *Aging* through an internal web service call.
  - Updates the pricing on the parent installed product through an internal web service call.
5. If line item action is of type *Add Product*, it:
  - Creates an installed product through an internal web service call.
  - Publishes details to the external provisioning system about the new installed product through an external web service call.
  - Sets the installed product status to *Installed* through an internal web service call.
  - If the added product has a phone number, sets the phone number status to *Active* through an internal web service call.
6. For all line items within this order (those that are in any of the mentioned action type and those that are not), the process updates the attributes of their installed products accordingly.  
The information is available on the order as well.
7. The status of the order is changed to *Completed*, which also takes care of updating all the line statuses to *Completed* if they are not already in the *Completed*, *Cancelled*, or *Shipped* status.

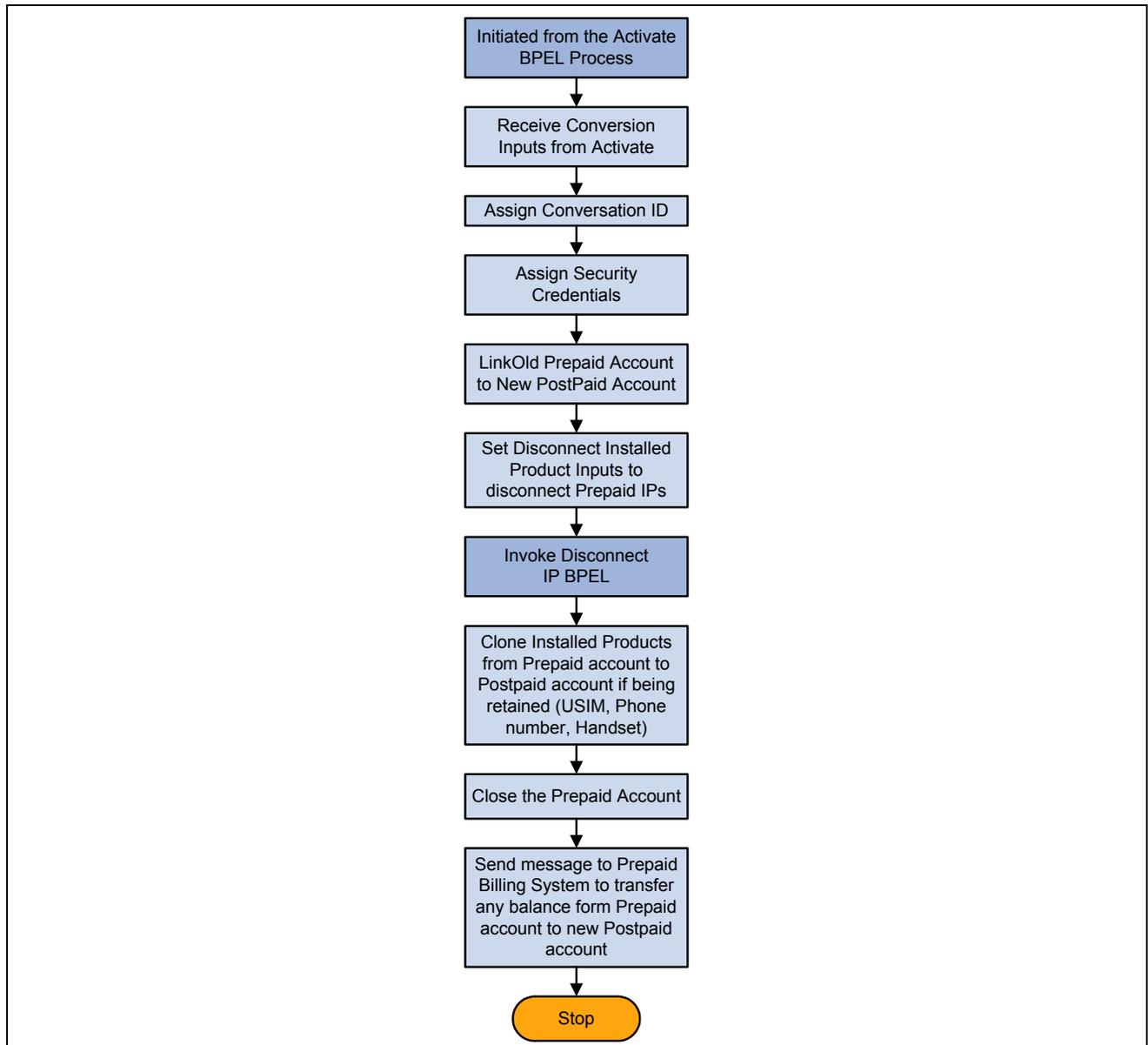
The *Change Service* business process ends.

## Prepaid to Postpaid Account Conversion Process Flow

This process is called from the *Service Management Activate Service* business process. It performs various tasks, which includes closing down the prepaid account, moving its installed products to the new postpaid account, and if applicable, notifying the prepaid billing system to transfer any balances. It also links the prepaid and postpaid accounts to maintain history.

See [Appendix A, “Order Capture Delivered Business Processes and Web Services,” Service Management Activate Service Process Flow, page 361.](#)

This diagram illustrates the *Prepaid to Postpaid Account Conversion* process flow:



Prepaid to Postpaid Account Conversion process flow

When this business process is initiated, it:

1. Calls the RBT\_ACCT\_LINK (Link Accounts) service operation of the delivered Billing Account web service to establish the link between the old prepaid and new postpaid accounts.

2. Invokes the *Service Management Disconnect Service* business process to disconnect the installed products of the prepaid account.
3. Calls the RBT\_ACCT\_CONVERT (Complete Account Conversion) service operation of the delivered Billing Account web service to clone any installed products that are carried over from the prepaid account to the postpaid account.

Products that can be moved include the USIM (UMTS Subscriber Identity Module), phone number, and handset.

4. Calls the RBT\_ACCT\_UPDT (Update Account) service operation of the delivered Billing Account web service to set the status of the prepaid account to *Closed*.
5. Sends a message to the prepaid billing system to transfer and balances on the prepaid account to the postpaid account.

As delivered, the prepaid billing system is simulated by the PrepaidBillingSystemWebService business process. Customers need to replace it with their own integration partner.

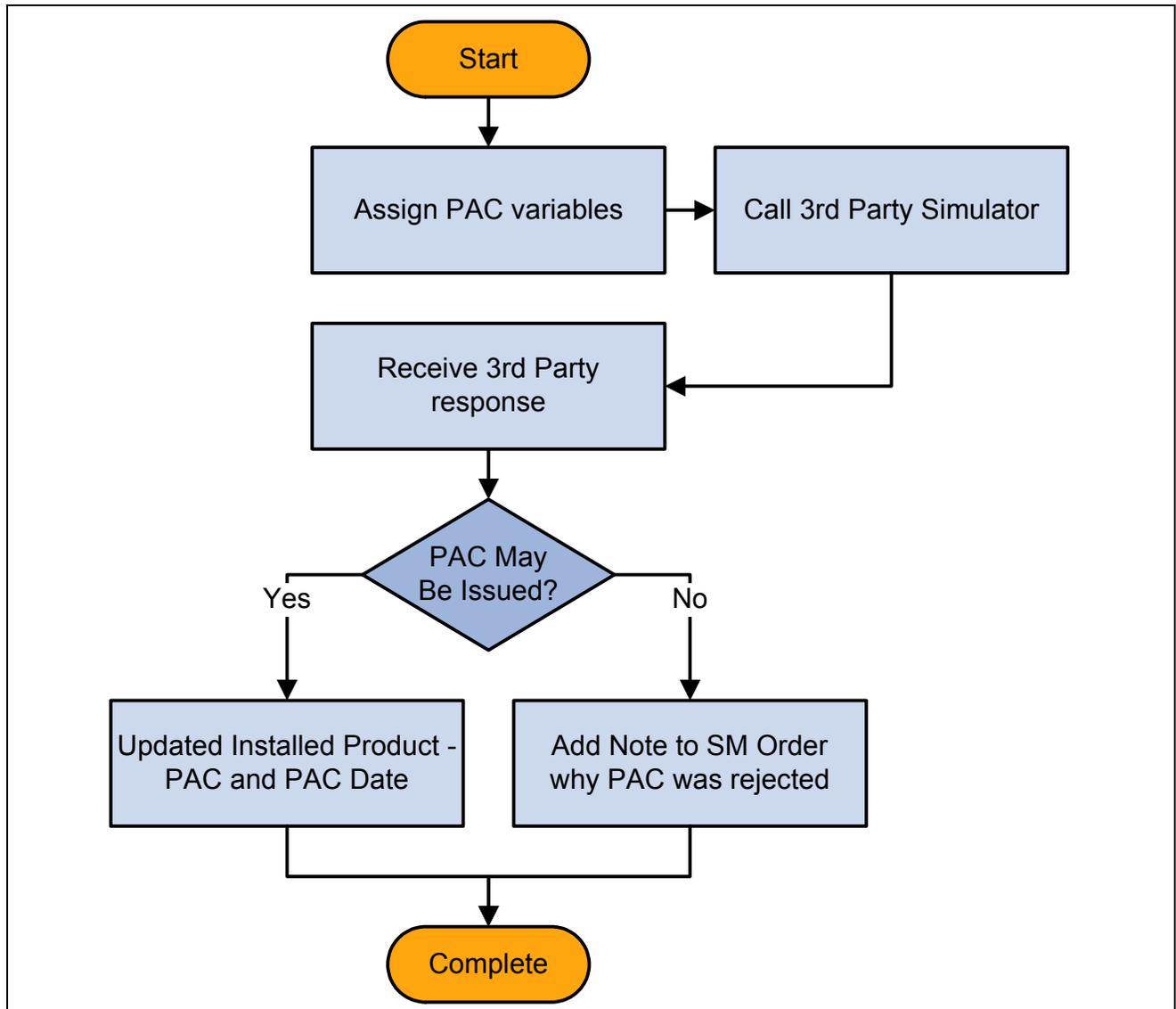
The *Prepaid to Postpaid Account Conversion* business process ends, and returns the control back to the *Service Management Activate Service* business process.

See [Appendix A, “Order Capture Delivered Business Processes and Web Services,” Service Management Disconnect Service Process Flow, page 371](#).

## PAC Request Process Flow

This process is initiated from service management orders in which the PAC request action is performed. It validates if a PAC is issued. If a PAC is issued, the installed product is updated with the information. If not, the service management order is updated with a note.

This diagram illustrates the *PAC Request* process flow:



PAC Request process flow

When this business process is initiated, it:

1. Copies payload values into the PAC validation simulator message.

With this data, it calls a third-party web service called `MNPThirdPartySimulator` (it is a placeholder that customers need to replace with their own web services). The simulator responds with an outcome of *true* or *false*.

A reason for denial is provided in the response if the outcomes is *false*.

2. If the outcome is true, calls the `RF_INST_PROD_UPDATE` (Update Installed Product) service operation of the delivered Installed Product web service to update the PAC value and the PAC expiration date.

`PAC expiration date = current date + 30 days`

See *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, “Product Delivered Web Services,” Delivered Web Services.

3. If the outcome is false, calls the RO\_SERVICEMGT\_ADDNOTE service operation to add a note to the service management order stating the reason for denying the PAC request.

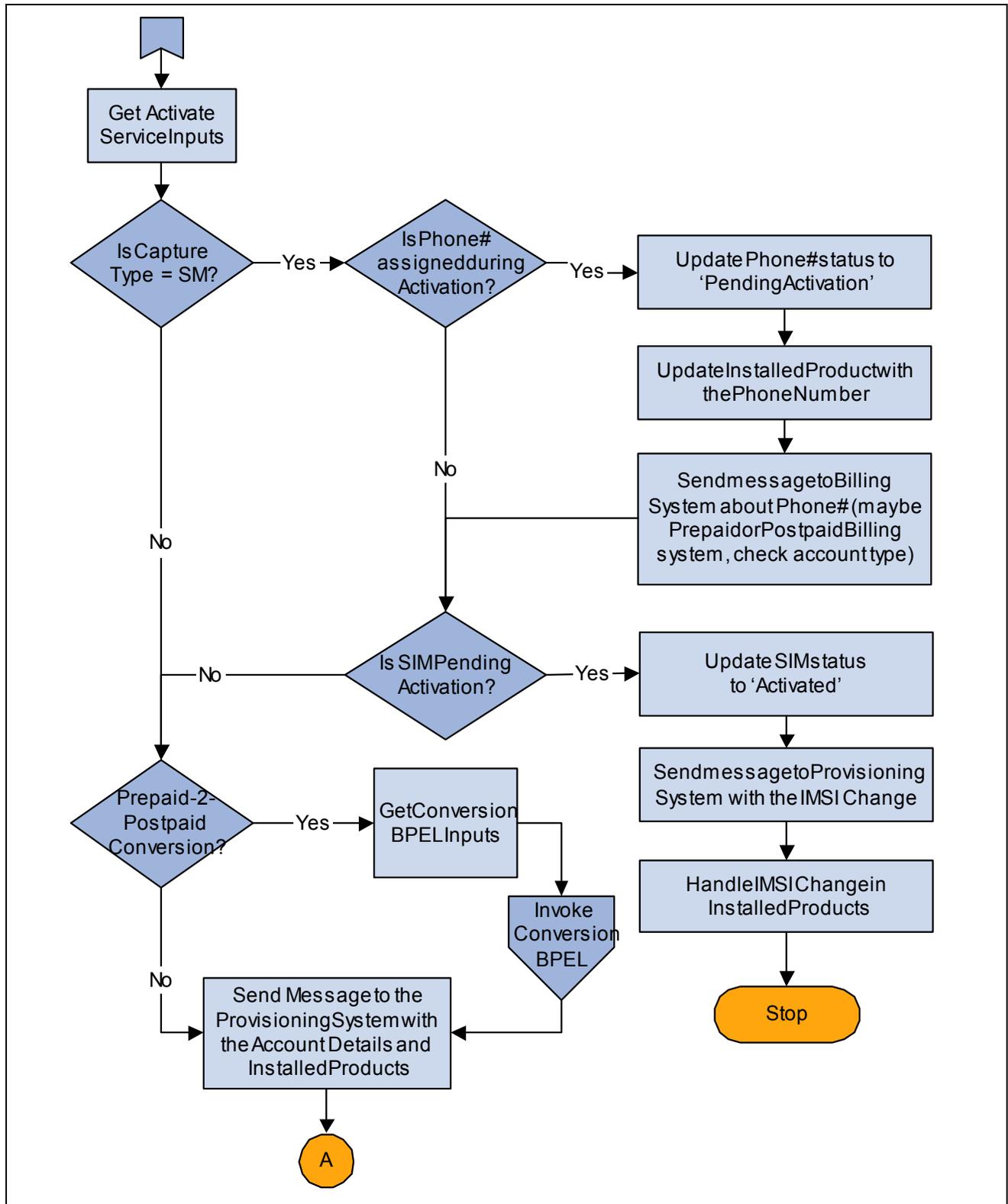
The *PAC Request* business process ends.

## Service Management Activate Service Process Flow

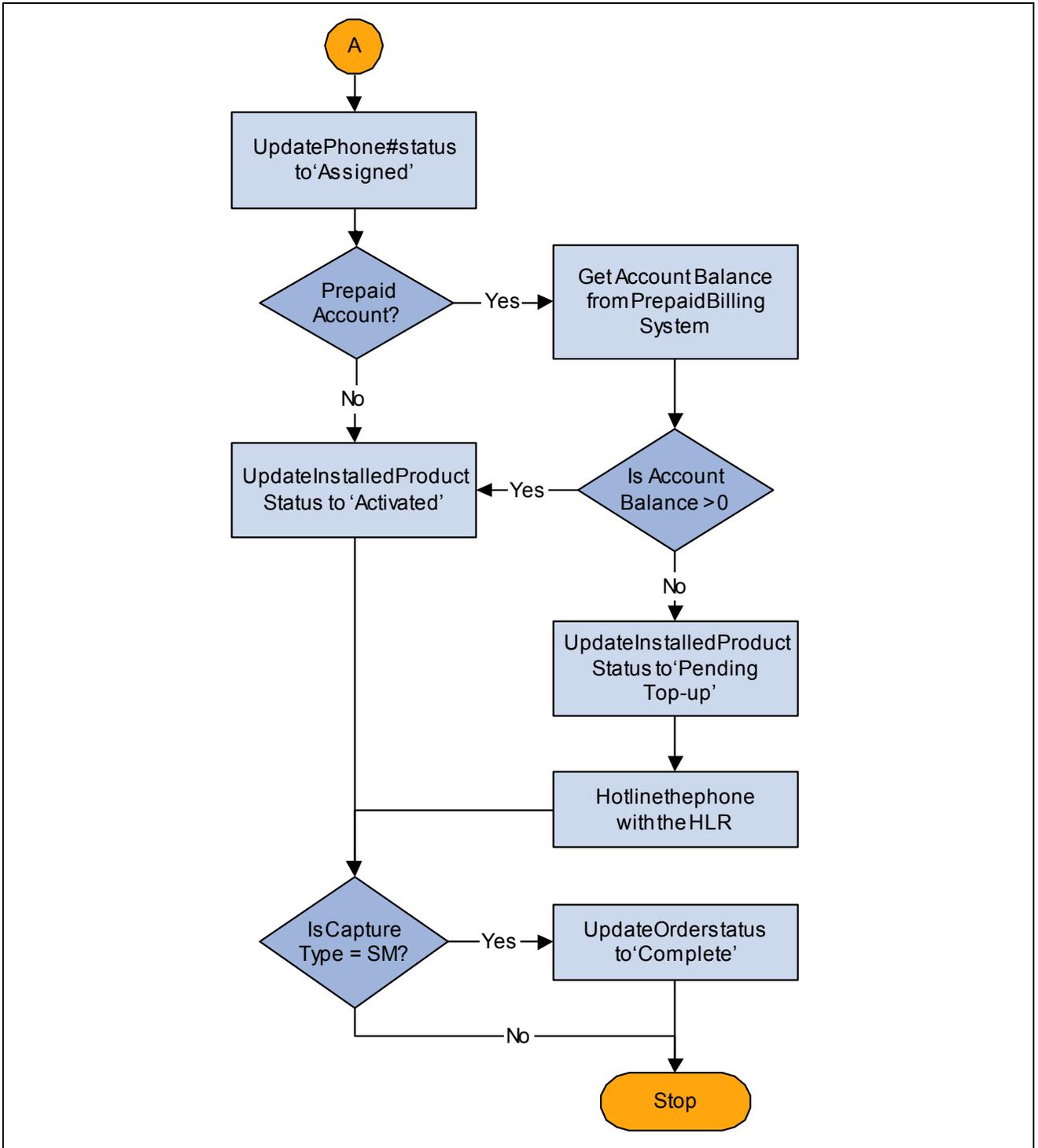
This process can be called from service management orders (activate service) or new orders. It performs various activation tasks, such as updating the phone number, updating the SIM, invoking the *Prepaid to Postpaid Account Conversion* business process, updating the installed product status, and communicating with both the provisioning and billing systems.

See [Appendix A, “Order Capture Delivered Business Processes and Web Services,” Prepaid to Postpaid Account Conversion Process Flow, page 358.](#)

This diagram illustrates the Service Management Activate Service process flow:



Service Management Activate Service process flow (1 of 2)



Service Management Activate Service process flow (2 of 2)

When this business process is initiated, it:

- Calls the RO\_SERVICEMGT\_GETACTSRVCMMSG (Get Activate Service Message) service operation of the delivered RO\_SERVICEMGT (Service Management) web service to get inputs for the RBTActivateService business process.
- If it is a service management order, performs the following activities:

- If the phone number is assigned during activation:

First, it calls the RO\_NUMMGT\_SETNUMBERSTATUS (Set Number Status) service operation of the delivered RO\_NUMMGT (Number Management) web service to update the phone number status to *Pending Activation*.

Then, it calls the RF\_INST\_PROD\_UPDATE (Update Installed Product) service operation of the delivered RF\_INST\_PRODUCT (Installed Product) web service to update the phone number on the installed products.

Next, it calls the BillingActivateServiceRequest service operation of a third-party web service (BillingSimulator) to notify them about the phone number.

- If the SIM is in pending activation:

First, it calls the RO\_NUMMGT\_SETSIMSTATUS (Set SIM Card Status) service operation of the delivered RO\_NUMMGT\_SETSIMSTATUS (Number Management) web service to update SIM status to *Activated*.

Then, it calls the ProvisioningActivateRequest service operation of the third-party web service (ProvisioningSimulator) to notify them of SIM change. Then, it calls the RO\_SERVICEMGT\_IMSI\_CHG (IMSI change operation) service operation of the delivered RO\_SERVICEMGT (Service Management) web service to update SIM on installed products.

Lastly, this service activation business process stops.

See *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, “Product Delivered Web Services,” Delivered Web Services.

- If the order is for prepaid to postpaid conversion, performs the following activities:
  - It calls the RO\_SERVICEMGT\_GETDISSRVCMMSG (Get Disconnect Service Details) service operation of the delivered RO\_SERVICEMGT (Service Management) web service to get inputs for the ConvertPreToPostPaid business process.
  - It calls the delivered RBTConvertPreToPostPaid business process to convert the product from prepaid to postpaid.
- Calls the ProvisioningActivateRequest operation of the third-party web service (ProvisioningSimulator) to publish information about account details and installed products.
- Calls the RO\_NUMMGT\_SETNUMBERSTATUS (Set Number Status) service operation of the delivered RO\_NUMMGT (Number Management) web service to set the phone number status to *Assigned*.
- If order is for a prepaid account, calls the AccountBalanceRequest operation of the third-party web service (BillingSimulator) to get the account balance.
- If the account balance is greater than zero *or* it is not a prepaid account, calls the RF\_INST\_PROD\_UPDATE (Update Installed Product) service operation of the delivered RF\_INST\_PRODUCT (Installed Product) web service to update to update the installed product status to *Activated*.
- If the account balance is equal to zero *and* it is a prepaid account, performs the following activities:
  - Calls the RF\_INST\_PROD\_UPDATE (Update Installed Product) service operation of the delivered RF\_INST\_PRODUCT (Installed Product) web service to update the installed product status to *Pending Top-Up*.
  - Calls the HotlineRequest operation of the third-party web service (HotlineSimulator).
- If it is a service management order, calls the RO\_ORDER\_COMPLETE (Order Completion) service operation of the delivered RO\_ORDER (Order) web service to change the order status to *Complete*.

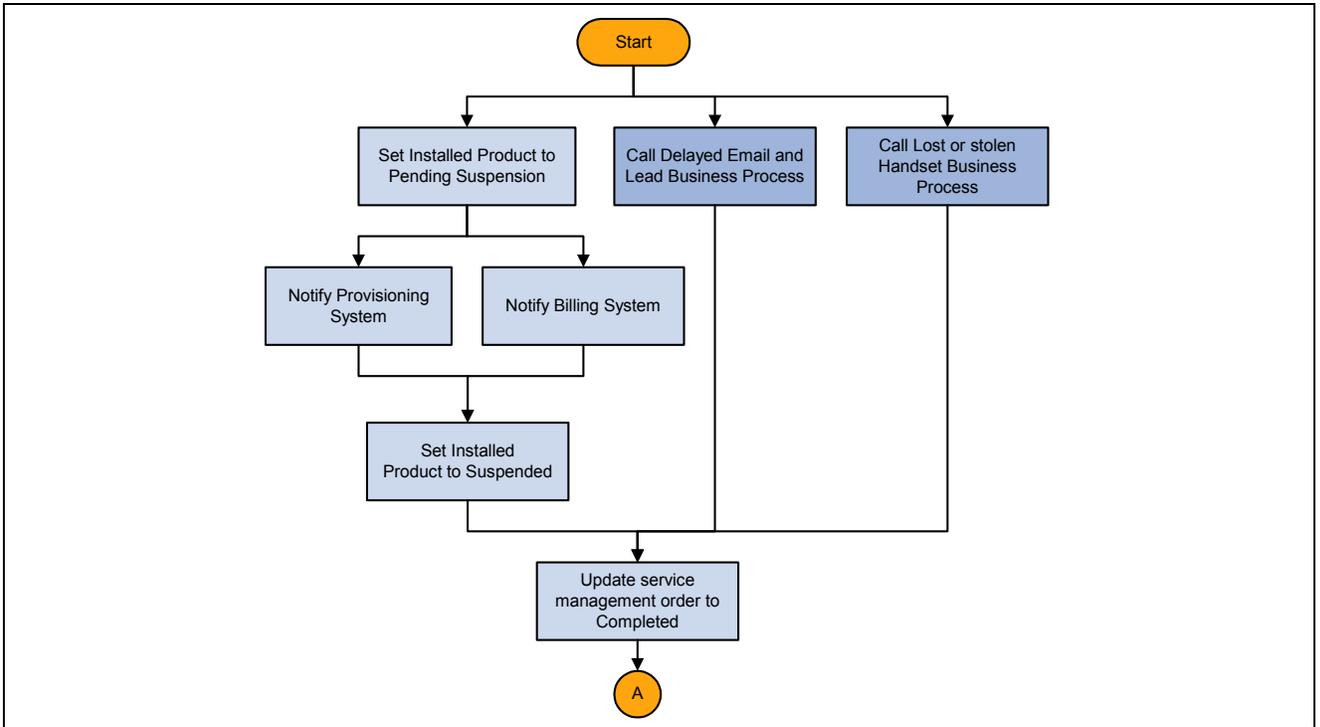
The *Service Management Activate Service* business process ends.

See *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, “Product Delivered Web Services,” Delivered Web Services.

## Service Management Suspend Service Process Flow

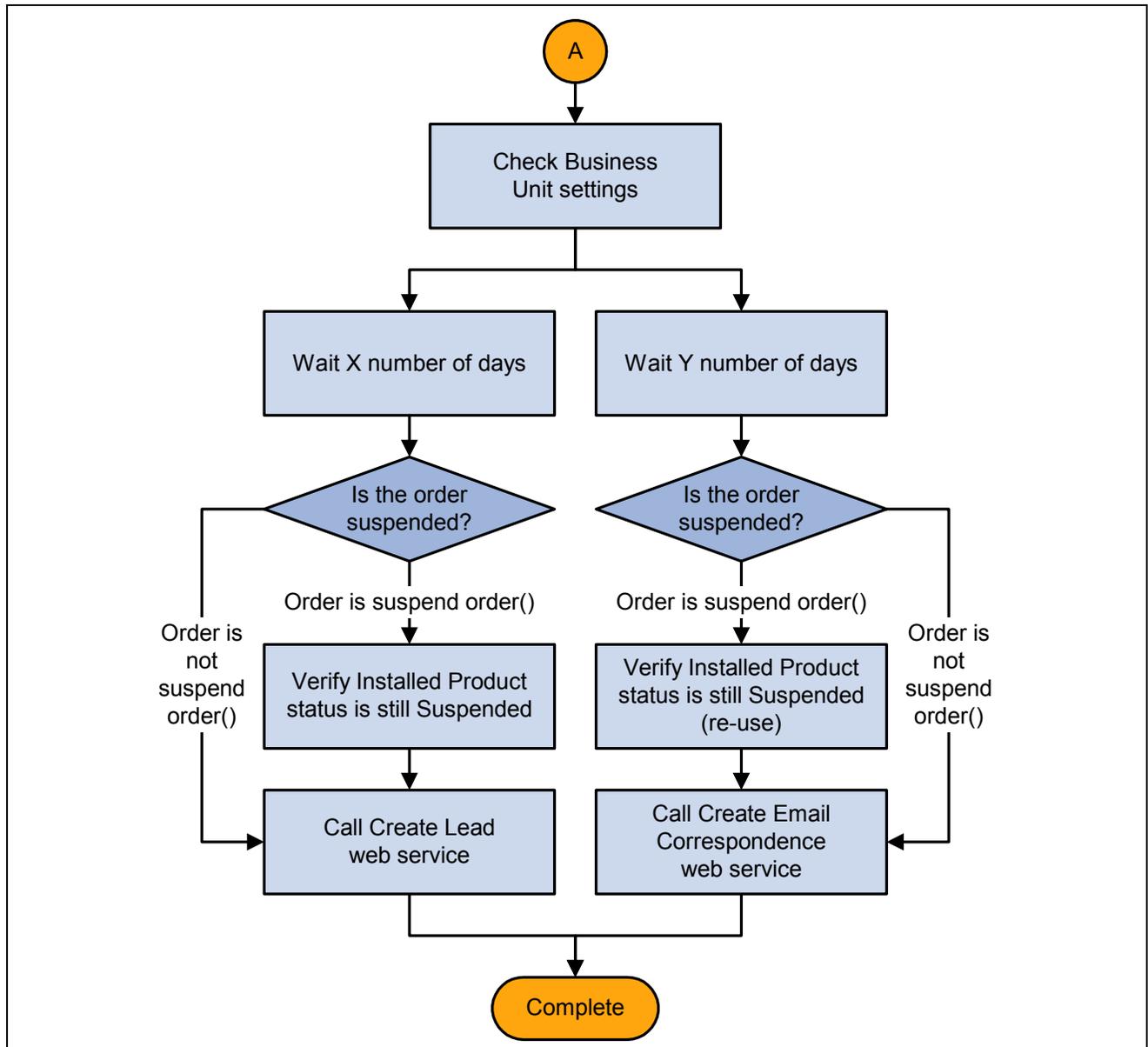
This process performs various tasks on service management orders for suspending services, which includes notifying billing and provisioning systems, updating install product statuses, processing lost or stolen handsets, as well as creating up-sell or cross-sell email and leads.

This diagram illustrates the *Service Management Suspend Service* process flow:



Service Management Suspend Service process flow

This diagram illustrates the *Delayed Email and Lead* process flow:



Delayed Email and Lead process flow

When this business process is initiated, it performs these high-level tasks in parallel:

- Suspends the customer's service.
  1. It updates the high-level installed product or installed service status to *Pending Suspension*.  
This is accomplished using the RF\_INST\_PROD\_UPDATE (Update Installed Product) service operation of the delivered Installed Product web service.
  2. It publishes a message to both the billing (prepaid or postpaid) and provisioning systems notifying them of the service suspension.  
This activity contains three stub processes: Prepaid Billing System, Postpaid Billing System, and Provisioning System.

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**Note.** Customers need to replace stub processes with actual web services that interact with their billing and provisioning systems.

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3. It waits for the first response message from either the billing or provisioning system.
4. It updates the high-level installed product or installed service status to *Suspended*.

This is accomplished using the RF\_INST\_PROD\_UPDATE (Update Installed Product) service operation of the delivered Installed Product web service.

- Processes up-sell or cross-sell lead and email.

This is a conditional activity that is based on the business unit settings and whether or not a replacement handset has already been purchased by the customer.

It initiates the *Delayed Email and Lead* subbusiness process, which creates a lead and an email in parallel:

1. Creates lead:
  - i. Waits  $x$  number of days before the process continues (if specified in the business unit settings).
  - ii. Validates that the service is still in the status of *suspended*.

This is accomplished using the RF\_INST\_PROD\_GET (Get Installed Product) service operation of the delivered Installed Product web service.

- iii. Creates a lead.

This is accomplished using the RSF\_LEAD\_CREATE (Create Lead) service operation of the delivered Sales web service.

2. Creates email:
  - i. Waits  $y$  number of days before the process continues (if specified in the business unit settings).
  - ii. Validates that the service is still in the status of *suspended*.

This is accomplished using the RF\_INST\_PROD\_GET (Get Installed Product) service operation of the delivered Installed Product web service.

- iii. Creates an email correspondence request.

This is accomplished using the delivered CMF\_WS\_ENABLE web service.

- Processes lost or stolen handset.

This is a conditional activity that is based on the customer's reason for suspending the service.

It initiates the *Lost or Stolen Handset* business process. This process consists of sending a message to the Equipment Identity Registry (EIR) system to blacklist the lost or stolen handset and is documented separately.

See [Appendix A, "Order Capture Delivered Business Processes and Web Services," Lost or Stolen Handset Process Flow, page 376](#).

After all parallel tasks are completed, the process updates the service management order status to *Complete*. This is accomplished using the RO\_ORDER\_COMPLETE (Order Completion) service operation of the delivered Order web service.

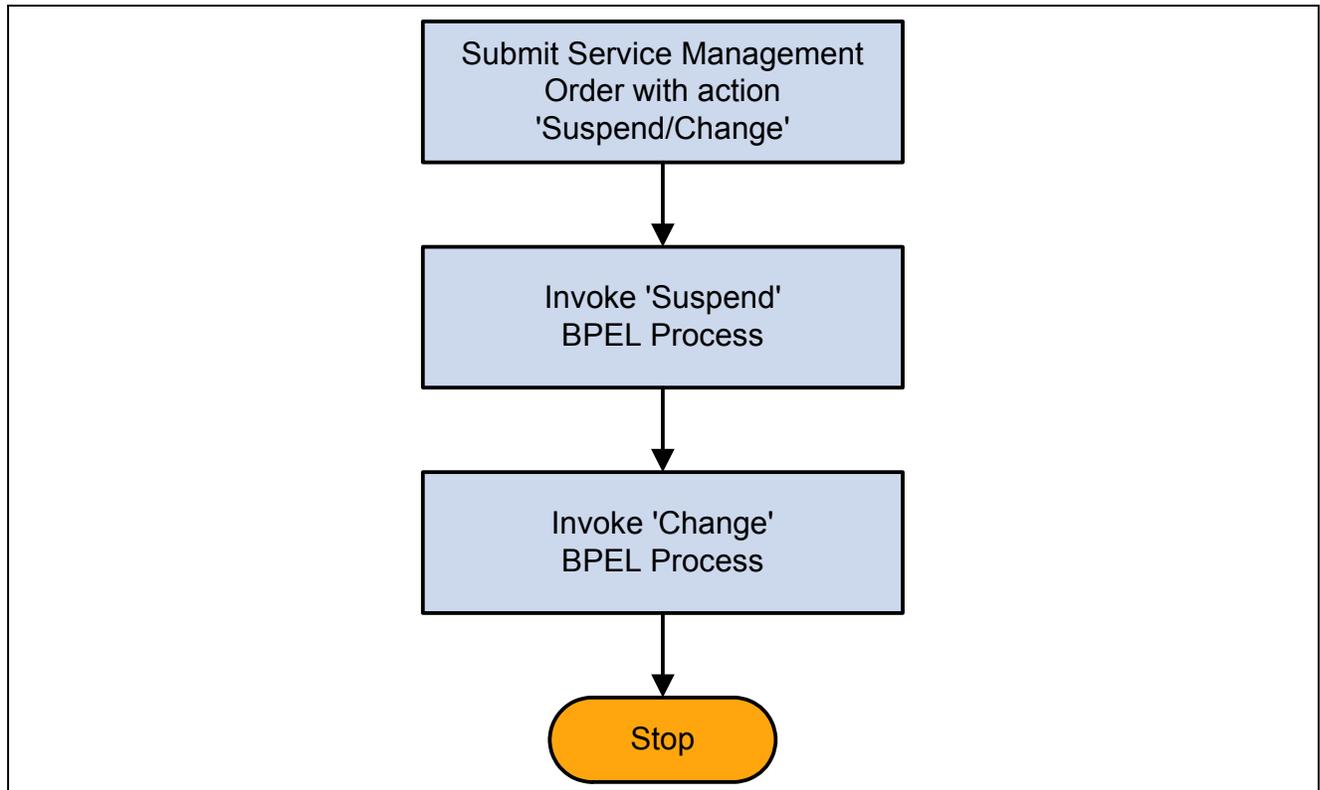
The *Service Management Suspend Service* business process ends.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Business Object Delivered Web Services"; *PeopleSoft Enterprise Sales 9 PeopleBook*, "Sales Delivered Business Processes and Web Services," *Delivered Web Services and PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Delivered Web Services and Service Operations".

## Service Management Suspend and Change Service Process Flow

This process is a combination of the *Suspend Service* and *Change Service* business processes. It is invoked from service management orders, supporting all the capabilities provided by each of the two standalone processes. The *Suspend Service* and *Change Service* business processes are executed in serial order.

This diagram illustrates the *Service Management Suspend and Change Service* process flow:



Service Management Suspend and Change Service process flow

When this business process is initiated, it performs two high-level tasks in serial:

1. Suspends the customer's service.

See [Appendix A, "Order Capture Delivered Business Processes and Web Services," Service Management Suspend Service Process Flow, page 365.](#)

2. Changes the customer's service.

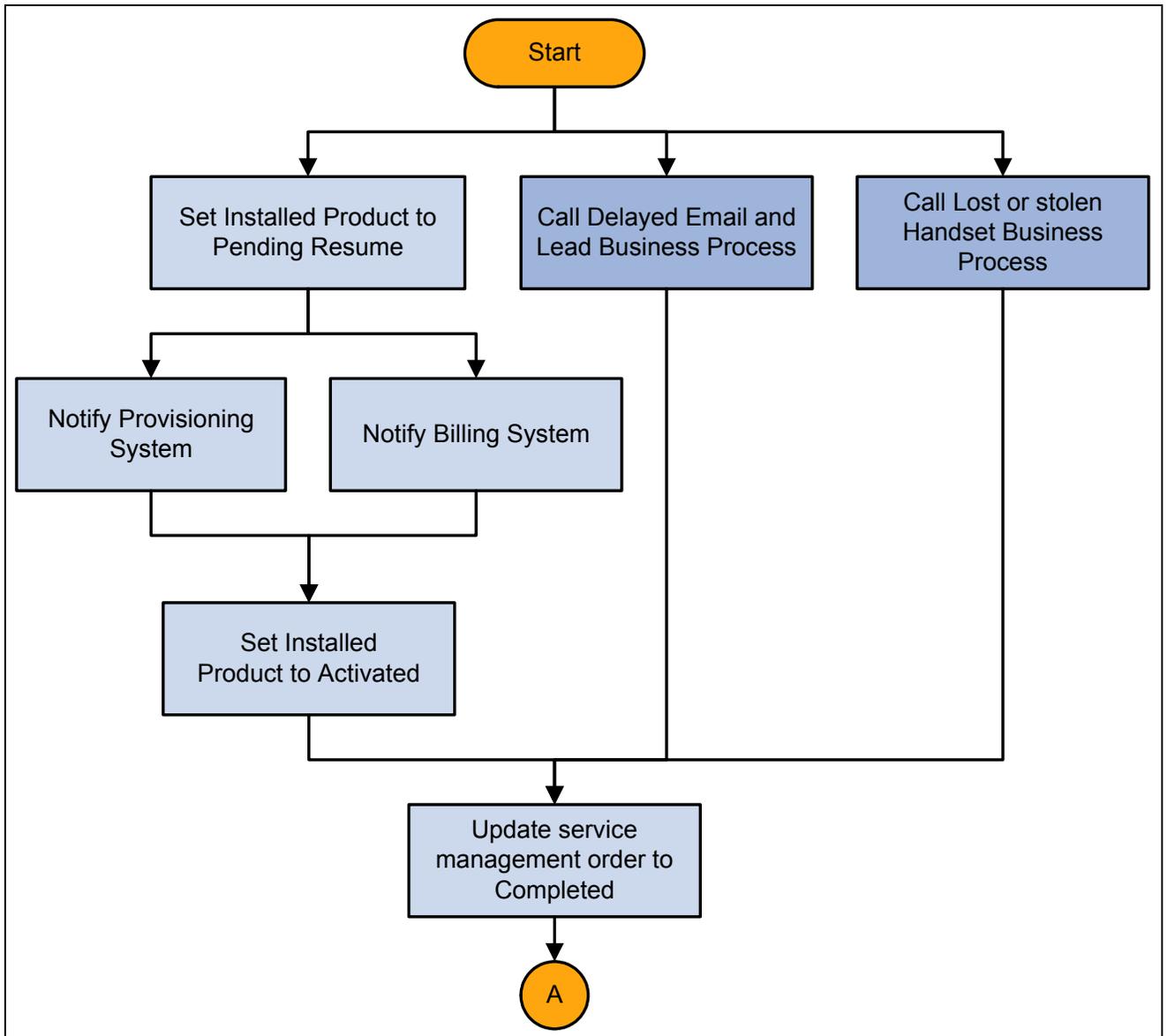
See [Appendix A, "Order Capture Delivered Business Processes and Web Services," Change Service Process Flow, page 355.](#)

The *Service Management Suspend and Change Service* business process ends.

## Service Management Resume Service Process Flow

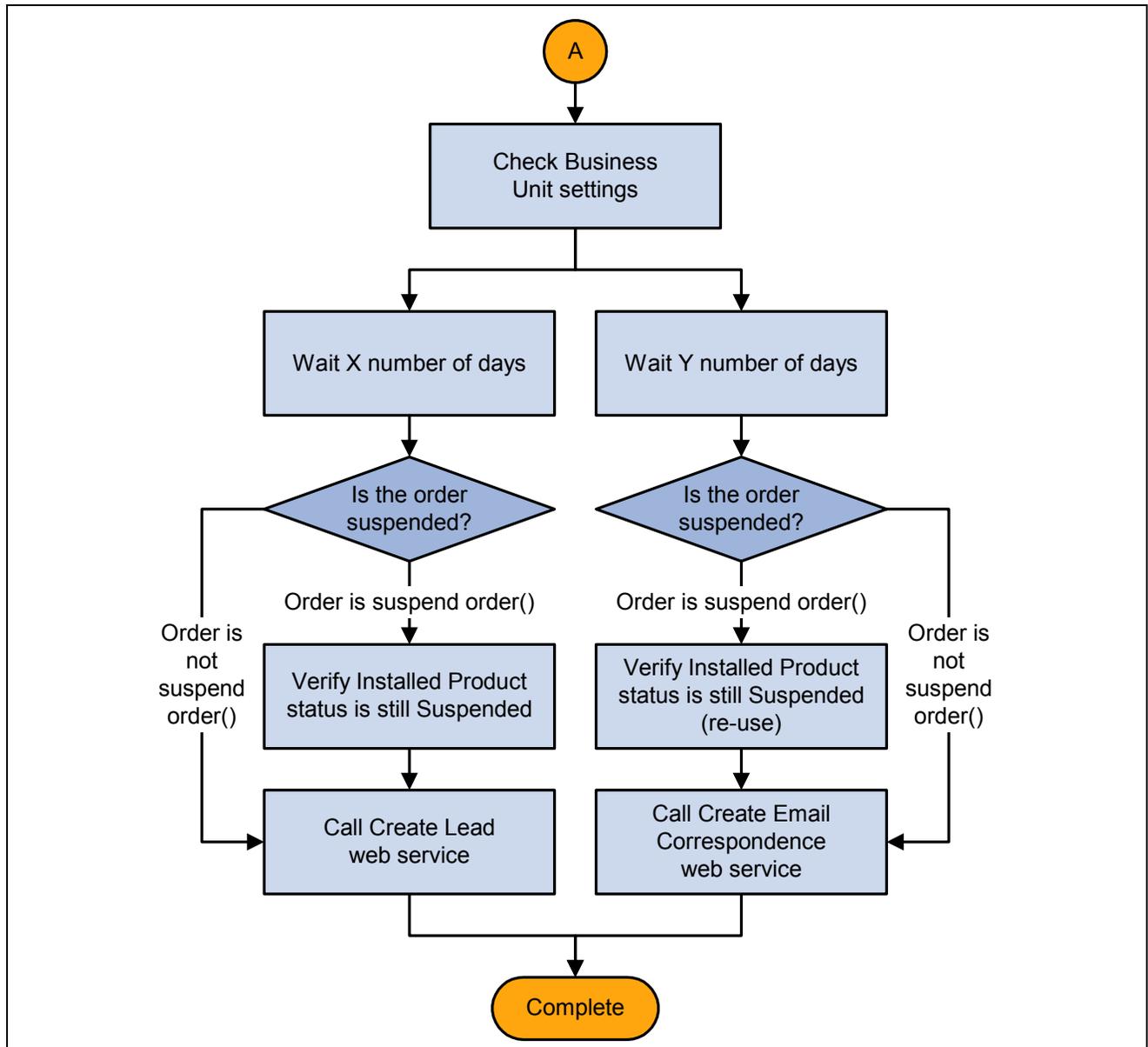
The process performs various tasks on service management orders for resuming services, which includes notifying billing and provisioning systems, updating install product statuses, processing previously lost or stolen handsets, as well as creating up-sell or cross-sell email and leads.

This diagram illustrates the *Service Management Resume Service* process flow:



Service Management Resume Service process flow

This diagram illustrates the *Delayed Email and Lead* process flow:



Delayed Email and Lead process flow

When this business process is initiated, it performs these high-level tasks in parallel:

- Resumes the customer's service.

1. It updates the high-level installed product or installed service status to *Pending Resume*.

This is accomplished using the RF\_INST\_PROD\_UPDATE (Update Installed Product) service operation of the delivered Installed Product web service.

2. It publishes a message to both the billing (prepaid or postpaid) and provisioning systems notifying them of the service resumption.

This activity contains three stub processes: Prepaid Billing System, Postpaid Billing System, and Provisioning System.

3. It waits for the first response message from either the billing or provisioning system.
4. It updates the high-level installed product or installed service status to *Activated*.

This is accomplished using the RF\_INST\_PROD\_UPDATE (Update Installed Product) service operation of the delivered Installed Product web service.

- Processes up-sell or cross-sell lead and email.

This is a conditional activity that is based on the business unit settings.

It initiates the Lead and Email subbusiness process, which creates a lead and an email in parallel:

1. Creates lead:
  - i. Waits  $x$  number of days before the process continues (if specified in the business unit settings).
  - ii. Creates a lead.  
This is accomplished using the RSF\_LEAD\_CREATE (Create Lead) service operation of the delivered Sales web service.
2. Create Email:
  - i. Wait  $Y$  number of days before the process continues (if specified in the business unit settings).
  - ii. Create an email correspondence request. This is accomplished using the delivered CMF\_WS\_ENABLE web service.

- Process previously lost or stolen handset.

This is a conditional activity that is based on the customer's reason for resuming the service.

It initiates the *Lost or Stolen Handset* business process. This process consists of sending a message to the EIR system to whitelist the found handset and is documented separately.

See [Appendix A, "Order Capture Delivered Business Processes and Web Services," Lost or Stolen Handset Process Flow, page 376.](#)

After all parallel tasks are completed, the process updates the service management order status to *Complete*. This is accomplished using the RO\_ORDER\_COMPLETE (Order Completion) service operation of the delivered Order web service.

## See Also

*PeopleSoft Enterprise Sales 9 PeopleBook*, "Sales Delivered Business Processes and Web Services," Referral or Lead-Related Business Process Flow

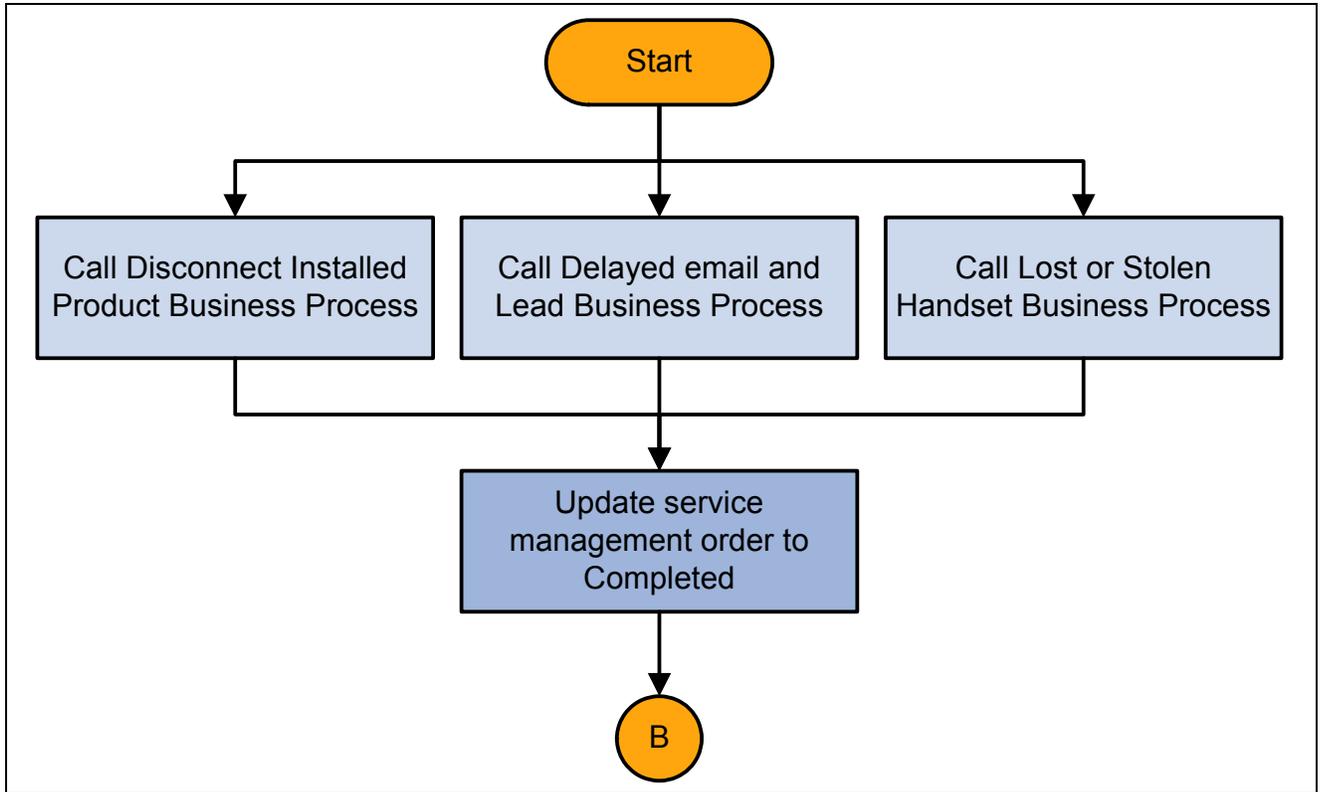
*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Delivered Web Services and Service Operations," Delivered Web Services

*PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Product Delivered Web Services," Delivered Web Services

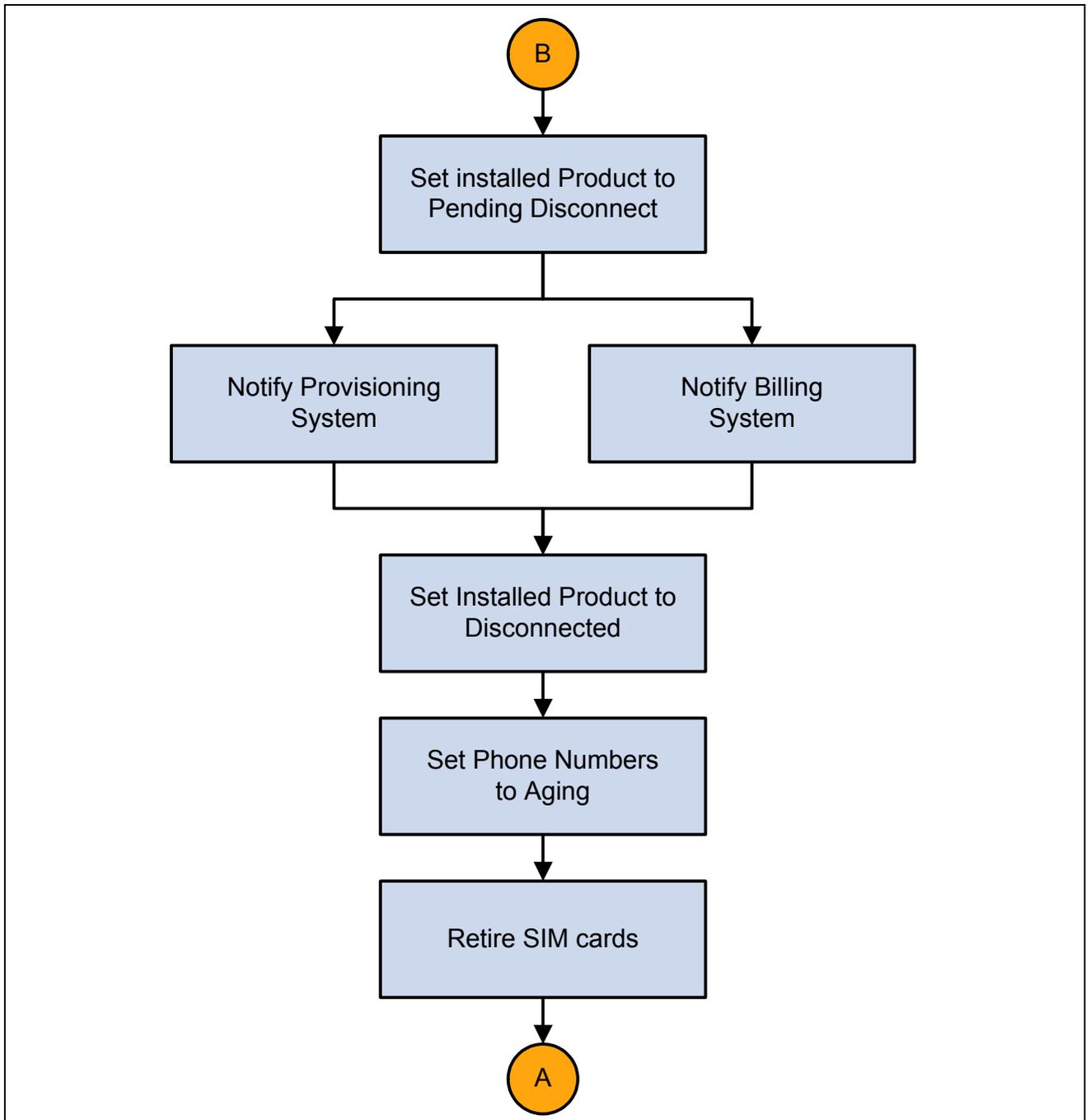
## Service Management Disconnect Service Process Flow

This process performs various tasks on service management orders for disconnecting services, which include notifying billing and provisioning systems, updating install product statuses, processing lost or stolen handsets, as well as creating up-sell or cross-sell email and leads.

This diagram illustrates the *Disconnect Service* process flow:

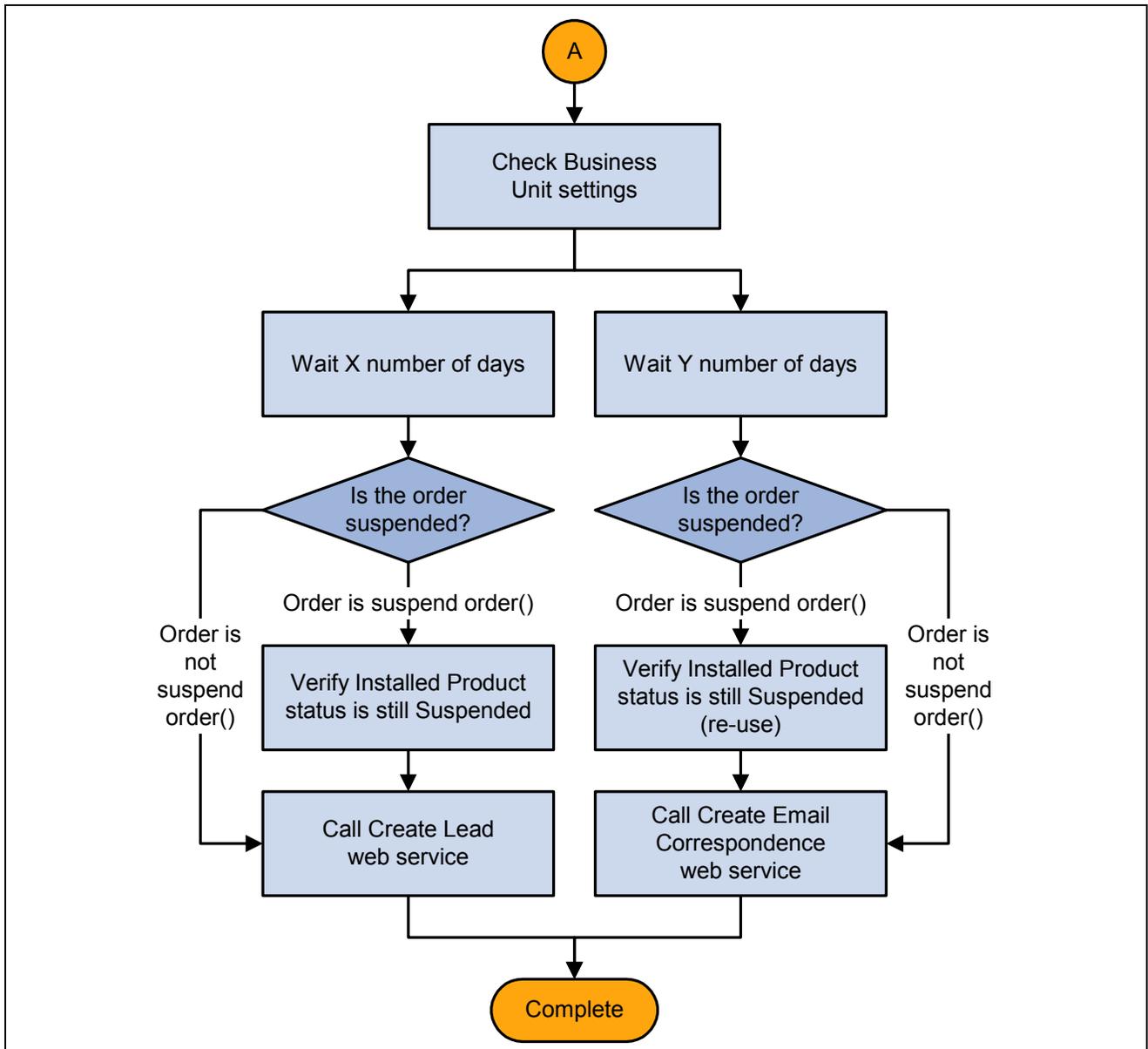


Disconnect Service process flow (1 of 2)



Disconnect Service process flow (2 of 2)

This diagram illustrates the *Delayed Email and Lead* process flow:



Delayed Email and Lead process flow

When this business process is initiated, it performs these high-level tasks in parallel:

- Disconnects the customer’s service.

This is accomplished by invoking a business process called *Disconnect Installed Product*, which performs the following tasks:

1. Updates the high-level installed product or installed service status to *Pending Disconnect*.

This is accomplished using the RF\_INST\_PROD\_UPDATE (Update Installed Product) service operation of the delivered Installed Product web service.

2. Publishes a message to both the billing (prepaid or postpaid) and provisioning systems notifying them of the service disconnection.

This activity contains three stub processes: Prepaid Billing System, Postpaid Billing System, and Provisioning System.

3. Waits for the first response message from either the billing or provisioning system.
4. Updates the high-level installed product or installed service status to *Disconnected*.  
This is accomplished using the RF\_INST\_PROD\_UPDATE (Update Installed Product) service operation of the delivered Installed Product web service.
5. Sets any disconnected phone numbers that are associated with the service to *aging*.  
This is accomplished using the RO\_NUMMGT\_SETAGING (Set Number to Aging) service operation of the delivered Number Management web service.
6. Retires any SIM cards that are associated with the disconnected service.  
This is accomplished using the RO\_NUMMGT\_SETSIMSTATUS (Set SIM Card Status) service operation of the delivered Number Management web service.

See [Appendix A, “Order Capture Delivered Business Processes and Web Services,” Service Management Disconnect Service Process Flow, page 371](#).

- Processes up-sell or cross-sell lead and email.

This is a conditional activity that is base on the business unit settings.

It initiates the *Delayed Email and Lead* subbusiness process, which creates a lead and an email in parallel:

1. Creates lead:
  - i. Waits  $x$  number of days before the process continues (if specified in the business unit settings).
  - ii. Creates a lead.  
This is accomplished using the RSF\_LEAD\_CREATE (Create Lead) service operation of the delivered Sales web service.
2. Creates email:
  - i. Waits  $y$  number of days before the process continues (if specified in the business unit settings).
  - ii. Creates an email correspondence request.  
This is accomplished using the delivered CMF\_WS\_ENABLE web service.

- Processes lost or stolen handset.

This is a conditional activity that is based on the customer’s reason for disconnecting the service.

It initiates the *Lost or Stolen Handset* business process. This process consists of sending a message to the EIR system to blacklist the lost or stolen handset and is documented separately.

After all parallel tasks are completed, the process updates the service management order status to *Complete*. This is accomplished using the RO\_ORDER\_COMPLETE (Order Completion) service operation of the delivered Order web service.

The *Service Management Disconnect Service* business process ends.

## See Also

*PeopleSoft Enterprise Sales 9 PeopleBook*, “Sales Delivered Business Processes and Web Services,” Referral or Lead-Related Business Process Flow

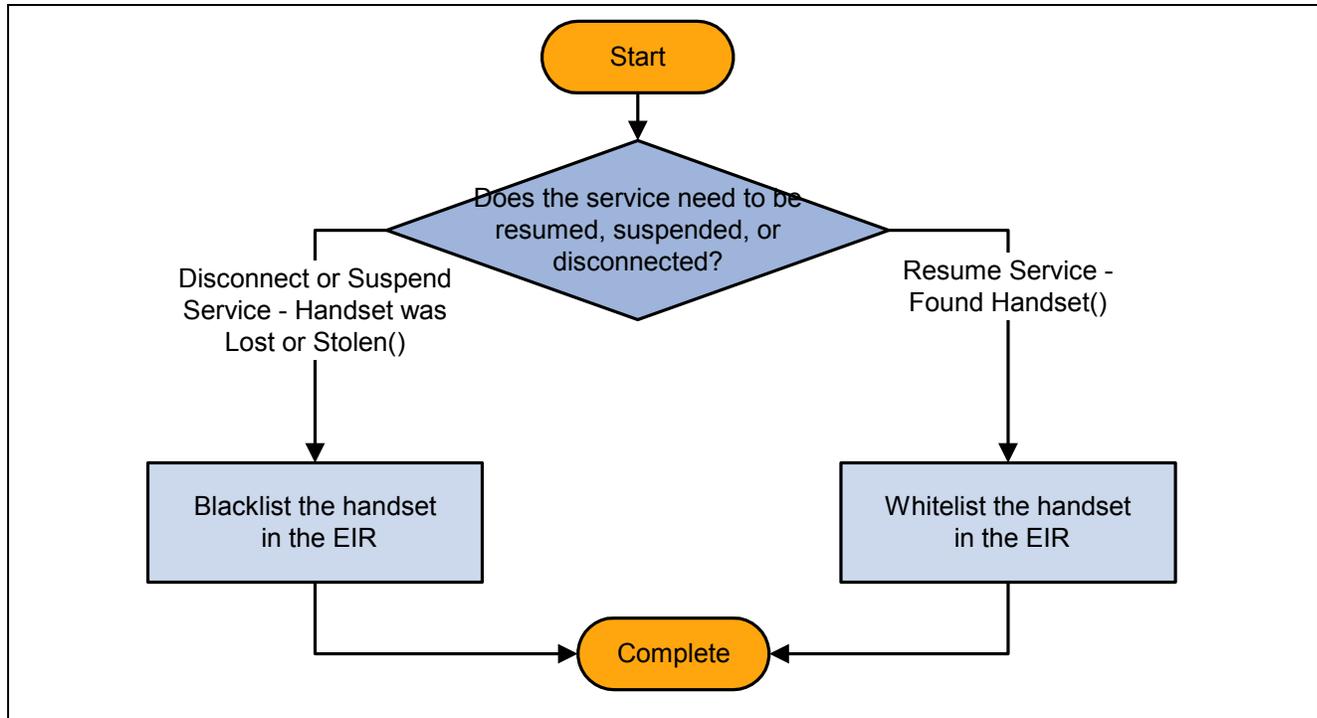
*PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Delivered Web Services and Service Operations,” Delivered Web Services

## Lost or Stolen Handset Process Flow

This process handles lost, stolen, or found handsets that are associated with customers' services. A handset is blacklisted if it is lost or stolen. A handset is whitelisted if it is found.

**Note.** *Lost or Stolen Handset* is a subbusiness process that is called from these main business processes: *Service Management Disconnect Service*, *Service Management Suspend Service*, and *Service Management Resume Service* business processes.

This diagram illustrates the *Lost or Stolen Handset* process flow:



Lost or Stolen Handset process flow

When this business process is initiated, it:

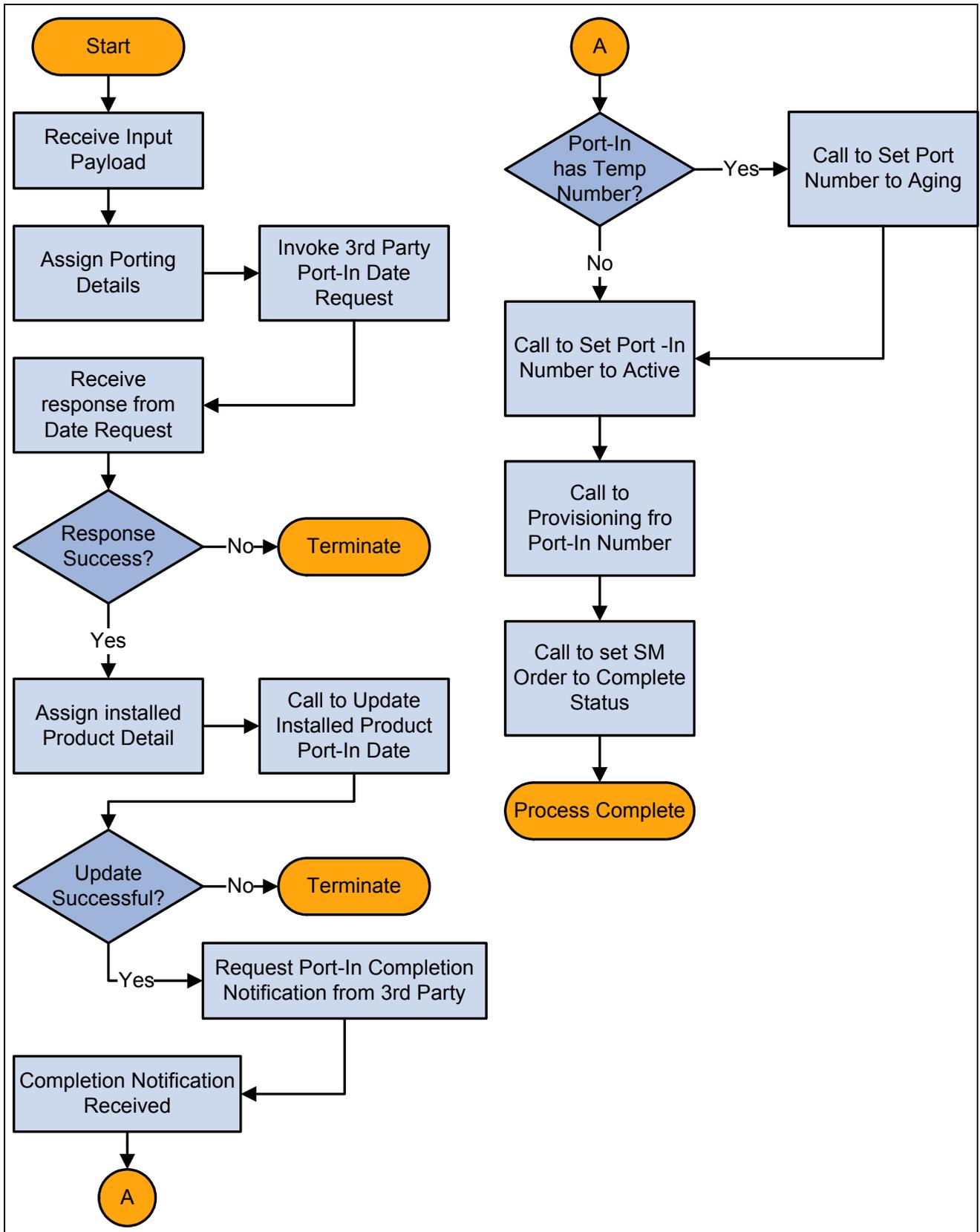
1. Verifies the make, model, and serial number of the handset provided.
2. Blacklists the handset in the Equipment Identity Registry (EIR) registry, if the handset is being reported as lost or stolen and service is being suspended or disconnected.  
If the handset is being reported as found and the service is being resumed, the process whitelists the handset in the EIR registry.
3. Returns control to the calling business process.

The EIR is delivered as a stub web service, which represents a customer's or a third-party EIR service.

## Service Management Port In Process Flow

This process is initiated from service management orders which contain the *Port In* action. The process controls the flow of business events involved in porting in a phone number from one wireless carrier to another. This process is only executed after a separate process has successfully validated all customer account, address, phone and billing information.

This diagram illustrates the *Service Management Port In* process flow:



Service Management Port In process flow

When this business process is initiated, it:

1. Copies payload values into a PortIn Date Request message.  
With this data, it then calls a stub process (a placeholder for a third-party web service) called PortInDateRequest. This is an asynchronous call. The third-party web service responds with an agreed port-in date.
2. Processes the response that is received from the third-party system.
  - If the response indicates that the number porting procedure cannot happen, this process logs the exception message and ends.
  - If the response returns a port-in date successfully, it calls the RF\_INST\_PROD\_UPDATE (Update Installed Product) service operation of the delivered Installed Product web service to update the port-in date on the installed product.  
If the update fails, this process logs a message and ends.
3. Calls a third-party web service to request the port in completion notification.  
This is a stub process (a placeholder for a third-party web service) called PortInCompleteNotification. This is an asynchronous process.  
When the Complete Notification response is received, the third-party system has completed its part of the porting process. Remaining porting tasks continue in the CRM system.
4. If a temporary number is assigned to the port-in, calls the RO\_NUMMGT\_SETAGING (Set Number to Aging) service operation of the delivered Number Management web service to release this temporary number back to inventory with the standard aging.
5. Calls the RO\_NUMMGT\_SETNUMBERSTATUS (Set Number Status) service operation of the delivered Number Management web service to set the port-in number to *Active*.
6. Calls the ProvisioningChgRequest service operation from the delivered RBTProvisioningSimulator placeholder to let an external billing system know that the port-in number is now active.
7. Sets the service management order status to *Complete* by calling the RO\_ORDER\_COMPLETE (Order Completion) service operation of the delivered Order web service.

The *Service Management Port In* business process ends.

See *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, “Product Delivered Web Services,” Delivered Web Services.

## Use of Sub and Stub Business Processes in Delivered Business Processes

This table lists the subbusiness processes and stub business processes that are used in each of the delivered Order Capture business process (an *x* marks the inclusion of the sub or stub business process in the corresponding main business process):



## Agreement

PeopleSoft delivers the Agreement Creation For Order service operation for the Agreement (RO\_AGREEMENT) web service. This operation creates agreements for orders. It takes a capture ID and returns a successful status if the agreement is created. The service operation handler takes care of validating the various requirements before the agreement is created. An error message is returned if the operation fails.

This table provides the technical name, operation type, and messages names of the Agreement Creation For Order service operation:

Service Operation	Operation Type	Request Message	Response Message
Agreement Creation For Order (RO_AGREEMENT_CREATE_FOR_ORDER)	Synchronous	RO_AGREEMENT_CREATE_REQ	RO_AGREEMENT_CREATE_RES

## Billing Account

PeopleSoft delivers these service operations for the Billing Account (RBT\_BILLING\_ACCOUNT) web service:

- Complete Account Conversion.

This operation takes a prepaid billing account number that needs to be converted to postpaid account and returns a successful status if the account conversion is completed. An error message is returned if the operation fails

- Link Accounts.

This operation takes the numbers of two billing accounts (for example, a prepaid account and a postpaid account) to be linked, and returns a successful status if the account linkage is built. An error message is returned if the operation fails.

- Update Account.

This operation takes a billing account number and the status to which the account needs to be updated, and returns a successful status if the status update is completed. An error message is returned if the operation fails.

- Create Billing Account.

This operation takes a capture ID and returns the number of the billing account that is created for that order.

This table provides the technical names, operation type, and message names of the service operations that are related to the Billing Account web service:

Service Operation	Operation Type	Request Message	Response Message
Complete Account Conversion (RBT_ACCT_CONVERT)	Synchronous	RBT_ACCT_CONVERT_REQ	RBT_ACCT_CONVERT_RES
Link Accounts (RBT_ACCT_LINK)	Synchronous	RBT_ACCT_LNK_REQ	RBT_ACCT_LNK_RES

Service Operation	Operation Type	Request Message	Response Message
Update Account (RBT_ACCT_UPDT)	Synchronous	RBT_ACCT_UPDT_REQ	RBT_ACCT_UPDT_RES
Billing Account Create (RBT_BILLING_ACCOUNT_CREATE)	Synchronous	RBT_CREATE_BACCT_REQ	RBT_CREATE_BACCT_RES

## Order

PeopleSoft delivers these service operations for the Order (RO\_ORDER ) web service:

- Order Completion.

This operation sets the status of the order to *Completed*. It also sets the status of all line items in the order to *Completed* if they are not already in the *Completed*, *Canceled* or *Shipped*. It takes a capture ID and returns a successful status if the order is set to completed. An error message is returned if the operation fails.

- Create Installed Product for Order.

This operation creates installed products for orders. It also creates relationships amongst all the created installed products. It takes a capture ID and returns a successful status if the installed product is created. An error message is returned if the operation fails.

- Order Shipment Notification.

This operation receives advanced shipping notices (ASNs) for orders from an external fulfillment system. It takes care of updating the line item status of the received shipment to *Shipped*. It also establishes the relationship between the line item and the line item-SIM records.

- Relate Services to SIM.

This operation associates SIMs with installed services. It takes an setID, installed service ID, and ICCID, and returns a successful state if the association is complete. An error message is returned if the operation fails.

This table provides the technical name, operation type, and message names of the service operations that relate to the Order web service:

Service Operation	Operation Type	Request Message	Response Message
Order Completion (RO_ORDER_COMPLETE)	Synchronous	RO_ORDER_COMPLETE_REQ	RO_ORDER_COMPLETE_RES
CreateInstalledProductForOrder (RO_ORDER_INSTALLED_PRODUCT_CRT)	Asynchronous Request/Response	RO_ORDER_INSTALLED_PRODUCT_REQ Queue: ORDER_QUEUE	RO_ORDER_INSTALLED_PRODUCT_RES Queue: ORDER_QUEUE
Order Shipment Notification (RO_ORDER_NOTIFYSHIPMENT)	Asynchronous - One Way	RO_ORDER_NOTIFYSHIPMENT_REQ Queue: ORDER_QUEUE	N/A
Relate Services to SIM (RO_ORDER_RLT_INST_SVCS_TO_SIM)	Synchronous	RO_ORDER_RLT_TO_SIM_REQ	RO_ORDER_RLT_TO_SIM_RSP

## Phone Number Administration

PeopleSoft delivers these service operations for the Phone Number Administration (RO\_NUMMGT) web service:

- Add Number History.

This operation generates history details for phone numbers. It takes inputs such as customer ID, customer's role type ID, contact ID, contact's role type ID, and phone number, and returns a successful status if the operation is completed. An error message is returned if the operation fails. This operation can be used whenever a phone number is assigned to a customer.

- End Number to SIM Relationship.

This operation disassociates phone numbers from their related ICCIDs (Integrated Circuit Card Identifier), which are serial numbers of the SIM cards. It takes a phone number and its related ICCID, and returns a successful status if the operation is completed. An error message is returned if the operation fails.

This operation can be used whenever a phone number is no longer in service or transferred to another SIM or ported out to a different carrier.

- Set Number to Aging.

This operation changes the status of a phone number to *aging*. It takes a phone number and returns a successful status if the operation is completed. An error message is returned if the operation fails.

This operation can be used when a phone number is either disconnected or released by an external carrier.

- Set Number Status.

This operation sets the status of a phone number. It takes a phone number and the status to which the phone number needs to be set, and returns a successful status if the status update is completed. An error message is returned if the operation fails.

This operation can be used to set the status of the phone number during the life cycle of a phone number.

- Set SIM Card Status.

This operation sets the status of a SIM card. It takes an ICCID and the status to which the ICCID needs to be set, and returns a successful status if the status update is completed. An error message is returned if the operation fails.

This operation can be used to set the status of the SIM card during the life cycle of a SIM.

- Relate a Number to a SIM.

This operation assigns phone numbers to SIMs. It takes a phone number and an ICCID, and returns a successful status if the phone number is linked to the ICCID. An error message is returned if the operation fails.

This operation is can be used whenever a phone number is activated on a SIM.

This table provides the technical names, operation type, and message names of the service operations that are related to the Phone Number Administration web service:

Service Operation	Operation Type	Request Message	Response Message
Create Number History (RO_NUMMGT_CREATE_HISTORY)	Synchronous	RO_NUMMGT_HISTORY_REQ	RO_NUMMGT_HISTORY_RES
End Number Relationship (RO_NUMMGT_END_SIM_RELATIONSHIP)	Synchronous	RO_NUMMGT_END_RELATE_REQ	RO_NUMMGT_END_RELATE_RES
Set Number to Aging (RO_NUMMGT_SETAGING)	Synchronous	RO_NUMMGT_SETAGING_REQ	RO_NUMMGT_SETAGING_RES
Set Number Status (RO_NUMMGT_SETNUMBERSTATUS)	Synchronous	RO_NUMMGT_SETNUMSTATUS_REQ	RO_NUMMGT_SETNUMSTATUS_RES
Set SIM Card Status (RO_NUMMGT_SETSIMSTATUS)	Synchronous	RO_NUMMGT_SETSIMSTATUS_REQ	RO_NUMMGT_SETSIMSTATUS_RES
Relates a Number to a SIM (RO_NUMMGT_SIMRELATE)	Synchronous	RO_NUMMGT_RELATE_REQ	RO_NUMMGT_RELATE_RES

## Service Management

PeopleSoft delivers these service operations for the Service Management (RO\_SERVICEMGT) web service:

- Add Install Product.

This operation creates installed products for service management, for lines with the *Add* action code. It takes a capture ID and line number, and returns a successful status if the operation is completed. An error message is returned if the operation fails.

- Service Management - Add Note to Order.

This operation adds notes to service management orders. It takes inputs such as the capture ID, notes summary, note details, note type, and the visibility option, and returns a successful status if the note is added. An error message is returned if the operation fails.

Note that this operation may also be used on non-Service Management orders.

- Service Management - Add and Submit Order.

This operation adds and submits service management orders. It takes inputs such as the business unit, customer BO ID, install product ID, action, action reason, associated capture ID, start and end dates, and returns the status of the operation, as well as the capture ID and status of the new order if the operation is completed. An error message is returned if the operation fails.

- Get Activate Service Message.

This operation gets the inputs for the *Service Management Activate Service* business process. It takes the capture ID as input and returns the message structure that the *Service Management Activate Service* business process requires to activate a service.

- Get Attribute for an Installed Product.

This operation takes a capture ID and line number and returns the attribute information of the installed product for the corresponding line item.

- Get Disconnect Service Details.

This operation gets the inputs for a call to the *Prepaid to Postpaid Account Conversion* business process. It is called by the *Activate Service* business process immediately before it calls the *Prepaid to Postpaid Account Conversion* business process. This operation takes an account ID and returns information about this account that has disconnected its service.

- IMSI (International Mobile Subscriber Identity) Change Operation.

This operation is used when the SIM on a service is changed. It sets the installed product status for the old SIM to be *Disconnected* and the installed product status for the new SIM to be *Installed*. It moves all child install products from the old SIM to the new SIM and ends the relationship between the old SIM and the phone number. It takes a capture ID and returns a successful status if the operation is completed. An error message is returned if the operation fails.

- Remove Installed Product.

This operation removes installed products from service management orders, for lines with the *Remove* action code. It takes a capture ID and line number and returns a successful status if the operation is completed. An error message is returned if the operation fails.

- Update Service Management Order Status.

This operation updates the status of service management orders. It takes a capture ID, a line number, and current status code, and returns a successful status if the operation is completed. An error message is returned if the operation fails.

The Get New Service Message service operation is not being used.

This table provides the technical names, operation type, and message names of the service operations that are related to the Service Management web service:

Service Operation	Operation Type	Request Message	Response Message
Add Install Product by Capture (RO_SERVICEMGT_ADDINSTPROD)	Synchronous	RO_WS_SM_DS_REQ	RO_WS_SM_OUTPUT_DS_RES
ServiceMgt - Add Note to Order (RO_SERVICEMGT_ADDNOTE)	Synchronous	RO_SERVICEMGT_ADDNOTE_REQ	RO_SERVICEMGT_ADDNOTE_RES
Service Mgt Add & Submit Order (RO_SERVICEMGT_ADDSUBMIT)	Synchronous	RO_SERVICEMGT_ADDSUB_REQ	RO_SERVICEMGT_ADDSUB_RES
Get Activate Service Message (RO_SERVICEMGT_GETACTSRVCMMSG)	Synchronous	RBT_GET_ACTSRVC_MSG_REQ	RBT_GET_ACTSRVC_MSG_RES

Service Operation	Operation Type	Request Message	Response Message
ROServiceMgtGetAttr (RO_SERVICEMGT_GETATTR)	Synchronous	RO_WS_SM_DS_REQ	RF_INST_PROD_UPDATE_REQ
Get Disconnect Service Details (RO_SERVICEMGT_GETDISSRVCMSG)	Synchronous	RO_SERVICEMGT_CONVERT_DIS_REQ	RO_SERVICEMGT_CONVERT_DIS_RES
IMSI change operation (RO_SERVICEMGT_IMSI_CHG)	Synchronous	RBT_IMSI_CHG_REQ	RBT_IMSI_CHG_RES
Remove Installed Product (RO_SERVICEMGT_RMVINSTPROD)	Synchronous	RO_WS_SM_RMV_REQ	RO_WS_SM_RMV_OUTPUT_DS_RES
ServiceMgt Update Order Status (RO_SERVICEMGT_UPDSTATUS)	Synchronous	RO_SERVICEMGT_UPDSTATUS_REQ	RO_SERVICEMGT_UPDSTATUS_RES

## Service Order

PeopleSoft delivers the Service Order Create service operation for the Service Order (RO\_SERVICE\_ORDER) web service. This operation creates service orders for the orders. The service operation handler takes care of validating various requirements for the creation of service orders and subsequently creates them. It takes a capture ID and returns a successful status if the status update is completed. An error message is returned if the operation fails.

This table provides the technical name, operation type, and messages names of the service operation that is related to the Service Order web service:

Service Operation	Operation Type	Request Message	Response Message
Service Order Create (RO_SERVICE_ORDER)	Asynchronous Request/Response	RO_SERVICE_ORDER_CREATE_REQ	RO_SERVICE_ORDER_CREATE_RES

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## Viewing Message Elements

You can view the elements and fields that are included in each operation message through PeopleTools.

To view a list of field names and aliases for a particular message:

1. Select PeopleTools, Integration Broker, Integration Setup, Messages.
2. Enter the name of the message that you want to view in the Message Name field and click Search.  
The Message Definition page appears.
3. Click the message name link under the Parts grid.

The system opens the Message Definition page in a new browser. This step is required only if you selected a *container* message. If you selected a *parts* message in step 2 above, proceed directly to step 4.

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**Note.** The system utilizes both *container* messages and *parts* messages. A *container* message may contain one or more parts. The *parts* message has the actual list of data fields.

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4. Click the plus sign next to the table name at the bottom of the page to view the fields and aliases associated with the message.



# Glossary of PeopleSoft Enterprise Terms

<b>absence entitlement</b>	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.
<b>absence take</b>	This element defines the conditions that must be met before a payee is entitled to take paid time off.
<b>academic career</b>	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).
<b>academic institution</b>	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.
<b>academic organization</b>	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.
<b>academic plan</b>	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.
<b>academic program</b>	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
<b>accounting class</b>	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.
<b>accounting date</b>	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.
<b>accounting split</b>	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
<b>accumulator</b>	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.
<b>action reason</b>	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.
<b>action template</b>	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.
<b>activity</b>	<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>
<b>address usage</b>	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.
<b>adjustment calendar</b>	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.
<b>administrative function</b>	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.
<b>admit type</b>	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
<b>agreement</b>	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.
<b>allocation rule</b>	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.
<b>alternate account</b>	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.
<b>analysis database</b>	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.

<b>Application Messaging</b>	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.
<b>AR specialist</b>	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
<b>arbitration plan</b>	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
<b>assessment rule</b>	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.
<b>asset class</b>	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
<b>attribute/value pair</b>	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
<b>audience</b>	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.
<b>authentication server</b>	A server that is set up to verify users of the system.
<b>base time period</b>	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
<b>benchmark job</b>	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.
<b>billing career</b>	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.
<b>bio bit or bio brief</b>	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.
<b>book</b>	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
<b>branch</b>	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
<b>budgetary account only</b>	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."
<b>budget check</b>	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
<b>budget control</b>	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.

<b>budget period</b>	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.
<b>business activity</b>	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.
<b>business event</b>	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).
<b>business process</b>	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> .
<b>business task</b>	The name of the specific function depicted in one of the business processes.
<b>business unit</b>	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
<b>buyer</b>	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.
<b>campus</b>	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.
<b>catalog item</b>	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.
<b>catalog map</b>	In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.
<b>catalog partner</b>	In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
<b>categorization</b>	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
<b>category</b>	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.
<b>channel</b>	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
<b>ChartField</b>	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.

<b>ChartField balancing</b>	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
<b>ChartField combination edit</b>	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
<b>ChartKey</b>	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.
<b>checkbook</b>	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.
<b>checklist code</b>	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.
<b>class</b>	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.  See also <i>course</i> .
<b>Class ChartField</b>	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> .
<b>clearance</b>	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.
<b>clone</b>	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.
<b>cohort</b>	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> .
<b>collection</b>	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.
<b>collection rule</b>	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.
<b>comm key</b>	See <i>communication key</i> .
<b>communication key</b>	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.

<b>compensation object</b>	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.
<b>compensation structure</b>	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
<b>component interface</b>	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.
<b>condition</b>	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.
<b>configuration parameter catalog</b>	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.
<b>configuration plan</b>	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.
<b>constituents</b>	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).
<b>content reference</b>	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.
<b>context</b>	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.  In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.  In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
<b>control table</b>	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.
<b>cost-plus contract line</b>	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.
<b>cost profile</b>	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.
<b>cost row</b>	A cost transaction and amount for a set of ChartFields.
<b>course</b>	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*.

<b>course share set</b>	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.
<b>current learning</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
<b>data acquisition</b>	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).
<b>data cube</b>	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.
<b>data elements</b>	Data elements, at their simplest level, define a subset of data and the rules by which to group them.  For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
<b>dataset</b>	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.
<b>delivery method</b>	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.  In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.
<b>delivery method type</b>	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.
<b>detailed business process</b>	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.
<b>dimension</b>	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
<b>directory information tree</b>	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

<b>division</b>	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.  See also <i>population</i> and <i>cohort</i> .
<b>document sequencing</b>	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.
<b>dynamic detail tree</b>	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.
<b>edit table</b>	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.
<b>effective date</b>	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.
<b>EIM ledger</b>	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.
<b>elimination set</b>	In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.
<b>entry event</b>	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.
<b>equitization</b>	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.
<b>equity item limit</b>	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.
<b>event</b>	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.  In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.
<b>event propagation process</b>	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.
<b>exception</b>	In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

<b>exclusive pricing</b>	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.
<b>fact</b>	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.
<b>financial aid term</b>	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.
<b>forecast item</b>	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.
<b>fund</b>	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.
<b>gap</b>	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.
<b>generic process type</b>	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.
<b>gift table</b>	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.
<b>GL business unit</b>	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> .
<b>GL entry template</b>	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.
<b>GL Interface process</b>	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.
<b>group</b>	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.
<b>incentive object</b>	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.
<b>incentive rule</b>	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.
<b>incur</b>	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.
<b>initiative</b>	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.
<b>inquiry access</b>	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.  See also <i>update access</i> .
<b>institution</b>	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.
<b>integration</b>	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.
<b>integration point</b>	An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.
<b>integration set</b>	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.
<b>item</b>	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.
<b>item shuffle</b>	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

<b>joint communication</b>	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.
<b>keyword</b>	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.
<b>KPI</b>	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.
<b>LDIF file</b>	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise data and directory data.
<b>learner group</b>	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.
<b>learning components</b>	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.
<b>learning environment</b>	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.
<b>learning history</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
<b>ledger mapping</b>	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.
<b>library section</b>	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.
<b>linked section</b>	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.
<b>linked variable</b>	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.
<b>LMS</b>	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.

<b>load</b>	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.
<b>local functionality</b>	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.
<b>location</b>	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.
<b>logistical task</b>	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.
<b>market template</b>	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.
<b>mass change</b>	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> .
<b>match group</b>	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.
<b>MCF server</b>	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.
<b>merchandising activity</b>	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.
<b>meta-SQL</b>	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.
<b>metastring</b>	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
<b>multibook</b>	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).
<b>multicurrency</b>	The ability to process transactions in a currency other than the business unit's base currency.
<b>national allowance</b>	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.
<b>need</b>	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> .
<b>node-oriented tree</b>	A tree that is based on a detail structure, but the detail values are not used.
<b>pagelet</b>	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.
<b>participant</b>	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
<b>participant object</b>	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
<b>partner</b>	A company that supplies products or services that are resold or purchased by the enterprise.
<b>pay cycle</b>	In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
<b>payment shuffle</b>	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.
<b>pending item</b>	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.
<b>PeopleCode</b>	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.
<b>PeopleCode event</b>	See <i>event</i> .
<b>PeopleSoft Pure Internet Architecture</b>	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.
<b>performance measurement</b>	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.
<b>period context</b>	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.

<b>person of interest</b>	A person about whom the organization maintains information but who is not part of the workforce.
<b>personal portfolio</b>	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
<b>plan</b>	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.
<b>plan context</b>	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.
<b>plan template</b>	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.
<b>planned learning</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
<b>planning instance</b>	In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
<b>population</b>	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> .
<b>portal registry</b>	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.
<b>price list</b>	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.
<b>price rule</b>	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.
<b>price rule condition</b>	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.
<b>price rule key</b>	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.

<b>primacy number</b>	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.
<b>primary name type</b>	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.
<b>process category</b>	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
<b>process group</b>	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.
<b>process definition</b>	Process definitions define each run request.
<b>process instance</b>	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.
<b>process job</b>	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.
<b>process request</b>	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.
<b>process run control</b>	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.
<b>product</b>	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.
<b>product category</b>	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.
<b>product family</b>	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.
<b>product line</b>	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.
<b>programs</b>	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.

<b>progress log</b>	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.
<b>project transaction</b>	In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
<b>promotion</b>	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.
<b>prospects</b>	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.
<b>publishing</b>	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
<b>rating components</b>	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
<b>record group</b>	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.
<b>record input VAT flag</b>	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.
<b>record output VAT flag</b>	Abbreviation for <i>record output value-added tax flag</i> .  See <i>record input VAT flag</i> .
<b>recname</b>	The name of a record that is used to determine the associated field to match a value or set of values.
<b>recognition</b>	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.
<b>reference data</b>	In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.
<b>reference object</b>	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).

<b>reference transaction</b>	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.
<b>regional sourcing</b>	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.
<b>relationship object</b>	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
<b>remote data source data</b>	Data that is extracted from a separate database and migrated into the local database.
<b>REN server</b>	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
<b>requester</b>	In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
<b>reversal indicator</b>	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
<b>role</b>	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.
<b>role user</b>	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.
<b>roll up</b>	In a tree, to roll up is to total sums based on the information hierarchy.
<b>run control</b>	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.
<b>run control ID</b>	A unique ID to associate each user with his or her own run control table entries.
<b>run-level context</b>	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.
<b>SCP SCBM XML message</b>	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.
<b>search query</b>	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.
<b>search/match</b>	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.

<b>seasonal address</b>	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.
<b>section</b>	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.
<b>security event</b>	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
<b>serial genealogy</b>	In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
<b>serial in production</b>	In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
<b>service impact</b>	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.
<b>service indicator</b>	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.
<b>session</b>	<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>
<b>session template</b>	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.
<b>setup relationship</b>	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
<b>share driver expression</b>	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.
<b>single signon</b>	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.

<b>source key process</b>	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.
<b>source transaction</b>	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.
<b>speed key</b>	See <i>communication key</i> .
<b>SpeedChart</b>	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.
<b>SpeedType</b>	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
<b>staging</b>	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
<b>standard letter code</b>	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.
<b>statutory account</b>	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
<b>step</b>	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
<b>storage level</b>	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.
<b>subcustomer qualifier</b>	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
<b>Summary ChartField</b>	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).
<b>summary ledger</b>	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.
<b>summary time period</b>	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.
<b>summary tree</b>	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.
<b>syndicate</b>	To distribute a production version of the enterprise catalog to partners.

<b>system function</b>	In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
<b>system source</b>	<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>
<b>TableSet</b>	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.
<b>TableSet sharing</b>	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.
<b>target currency</b>	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
<b>tax authority</b>	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.
<b>template</b>	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.
<b>territory</b>	In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
<b>third party</b>	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.
<b>3C engine</b>	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.
<b>3C group</b>	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.
<b>TimeSpan</b>	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.

<b>trace usage</b>	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.
<b>transaction allocation</b>	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.
<b>transaction state</b>	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.
<b>Translate table</b>	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.
<b>tree</b>	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.
<b>tuition lock</b>	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.
<b>unclaimed transaction</b>	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.
<b>universal navigation header</b>	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.
<b>update access</b>	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> .
<b>user interaction object</b>	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).
<b>variable</b>	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.
<b>VAT exception</b>	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.
<b>VAT exempt</b>	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.

<b>VAT exoneration</b>	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.
<b>VAT suspension</b>	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
<b>warehouse</b>	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
<b>work order</b>	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.
<b>worker</b>	A person who is part of the workforce; an employee or a contingent worker.
<b>workset</b>	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.
<b>worksheet</b>	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.
<b>worklist</b>	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.
<b>XML link</b>	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
<b>XML schema</b>	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
<b>XPI</b>	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.
<b>yield by operation</b>	In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
<b>zero-rated VAT</b>	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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