
PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook

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PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook
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About This PeopleBook

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

This preface discusses:

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

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

PeopleSoft Enterprise Application Prerequisites

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

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

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

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

Application Fundamentals

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

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

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

Documentation Updates and Printed Documentation

This section discusses how to:

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

Obtaining Documentation Updates

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

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

See Also

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

Downloading and Ordering Printed Documentation

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

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

Downloading PDF Files

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

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

Ordering Printed, Bound Volumes

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

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

Additional Resources

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

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

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

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

Common Elements Used in PeopleBooks

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

| | |
|------------------------------------|--|
| Once, Always, and Don't Run | <p>Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.</p> <p>Select Always to run the request every time the batch process runs.</p> <p>Select Don't Run to ignore the request when the batch process runs.</p> |
| Process Monitor | <p>Click to access the Process List page, where you can view the status of submitted process requests.</p> |
| Report Manager | <p>Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).</p> |
| Request ID | <p>An ID that represents a set of selection criteria for a report or process.</p> |
| Run | <p>Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.</p> |
| SetID | <p>An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.</p> |
| Short Description | <p>Enter up to 15 characters of text.</p> |
| User ID | <p>An ID that represents the person who generates a transaction.</p> |

Oracle's PeopleSoft CRM Services Foundation Preface

This preface discusses:

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

PeopleSoft 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.

PeopleSoft CRM Automation and Configuration Tools

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

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

- Correspondence Management

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

- Automation Tools

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

- Configuration Tools

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

- Knowledge Management

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

- Business Process Management

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

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

PeopleSoft 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 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.

PeopleTools PeopleBooks

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

PART 1

Getting Started

Chapter 1

Getting Started with PeopleSoft CRM Services Foundation

CHAPTER 1

Getting Started with PeopleSoft CRM Services Foundation

This chapter provides an overview of PeopleSoft Services Foundation and discusses:

- PeopleSoft services foundation business processes.
- PeopleSoft services foundation implementation.

PeopleSoft Services Foundation Overview

This book discusses the common foundation objects that are shared among PeopleSoft Integrated FieldService, the call center applications (PeopleSoft Support, HelpDesk, and HelpDesk for Human Resources), and industry solutions that leverage the functionality of these core applications. These objects are used in service orders and cases to provide solution management, integration with the Transaction Billing Processor, and geographical information lookup capabilities.

Solution management and integration with Transaction Billing Processor are available to PeopleSoft Integrated FieldService and most call center applications. Geographical information lookup, also known as the Environmental Systems Research Institute (ESRI) integration, is available to PeopleSoft Integrated FieldService and Support.

PeopleSoft Services Foundation Business Processes

This section discusses the business processes associated with solution, time management, integration with the Transaction Billing Processor, and ESRI integration. We discuss these business processes in the business process chapters in this PeopleBook.

Solution Management Business Process

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

Time Management Business Process

Time management enables users to log time for the work performed on cases. Field service technicians and managers use a different page that is embedded in the service order component

Transaction Billing Processor Integration Business Process

Transaction Billing Processor integration provides the ability to bill and book revenue through PeopleSoft Contracts for recurring and on-demand services and agreements. The fees sent to the Transaction Billing Processor include agreement fees, service order fees (including service, material, time, and expense fees), and case fees.

ESRI Integration Business Process

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

PeopleSoft Services Foundation Implementation

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

PeopleSoft Integrated FieldService and call center applications provide component interfaces to help you load data from your existing system into PeopleSoft tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

Each product's Getting Started chapter contains specific implementation and component interface information for that product. This PeopleBook includes information about solution management, time management, contracts and billing integration, and integration with ESRI.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces*.

Other Sources of Information

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

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, "Getting Started with PeopleSoft Enterprise CRM Call Center Applications"

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Getting Started with PeopleSoft Integrated FieldService"

PART 2

Solution Management

Chapter 2
Setting Up Solution Management

Chapter 3
Managing Solutions

Chapter 4
Using Solutions

CHAPTER 2

Setting Up Solution Management

This chapter provides an overview of solution management setup and discusses how to:

- Set up solution management prompt tables.
- Define record-based search index templates.
- Set up solution history tracking.

Understanding Solution Management Setup

Solutions are resolutions to problems. They exist independently from the cases, service orders, defects, and email responses to which they can be applied.

This section discusses:

- Solution relationship types.
- Solution libraries.
- Solution search templates.
- Solution history.

Solution Relationship Types

Solutions can be related to other solutions. You can relate solutions manually or automatically. When you relate solutions, you must qualify the relationship using a solution relationship type. Predefined types are *Similar* and *Duplicate*.

Solution relationship types, unlike case relationship types, are never hierarchical. The system uses the same relationship label for both solutions. (That is, if solution A is similar to solution B, then solution B is similar to solution A.)

Solution Libraries

Solution libraries enable you to group solutions into functional areas within a setID. For example, you can create solution libraries for each of your product lines. This level of categorization improves search effectiveness in PeopleSoft call center applications. Solution for cases enables users to choose libraries to include in the search domain. Solution for service orders does not filter solutions based on library.

Secondary Libraries

Libraries can be associated with other, secondary, libraries. When this occurs, solutions in the primary library can be given a secondary association with the secondary libraries. The same library can be a primary library for some solutions and a secondary library for other solutions.

A solution's secondary library associations do not affect processing. Specifically, solutions does not use the solution's secondary library to access the solution. For example, an agent who uses solutions to search library A will find only solutions that have a primary association with library A, not solutions that have a secondary association with it.

The only reason to give solutions secondary associations with libraries is if your organization designs administrative processes or reports based on secondary associations.

FAQ Libraries

The Frequently Asked Questions self-service page gives PeopleSoft Support self-service customers access to solutions whose primary library is set up as a frequently asked question (FAQ) library. To set up a library as an FAQ library, give it a secondary library called FAQ.

For example, if the library called FAQ is a secondary library for libraries X and Y but not for Z, then libraries X and Y appear in the drop-down list box from which customers can select a topic on the Frequently Asked Questions page. Library Z does not.

A customer who selects library X sees all solutions that have a primary association with X, regardless of any secondary associations. However, you can prevent a solution from appearing as an FAQ by setting its visibility to *Internal*.

Note. Self Service FAQ functionality is applicable to Customer Self Service and Employee Self Service for PeopleSoft Support, HelpDesk, and HelpDesk for Human Resources customers. PeopleSoft Integrated FieldService does not utilize FAQ functionality.

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “Configuring Self-Service Applications”

Solution Search Templates

PeopleSoft CRM provides multiple versions of solutions. Different versions search different objects. For example, solutions for PeopleSoft Integrated FieldService searches only solutions and service orders, while solutions for cases also searches cases, troubleshooting scripts, defects and fixes.

You can use the solution and error message search collection in various ways. In the three PeopleSoft CRM call center applications (PeopleSoft Support, HelpDesk, and HelpDesk for Human Resources), solution functionality is used to search for objects that can help resolve a case. Search groups determine which objects are searchable in agent-facing and self-service versions of solution searching.

The agent-facing version searches solutions. It also searches cases, troubleshooting scripts, fixes, and defects which can lead the searcher to a solution. The self-service version searches only solutions. Both versions enable users to associate selected solutions with the case from which the solution search was invoked. The self-service version additionally enables self-service users to search for solutions outside the context of a case.

In PeopleSoft Integrated FieldService, the system searches for solutions that are relevant to a service order. PeopleSoft Integrated FieldService does not track solution usage for service orders; search results are informational only.

Like solution searches for cases, the type of object that gets searched (solutions only) is controlled through search group configuration. As delivered, the system searches for solutions for service orders searches only.

Warning! PeopleSoft delivers one predefined search collection for Solutions (SEARCH_SOLUTIONS). Do not change this collection record index as there are codes tied to its record index (RC_SOLPRSRCH_VW). To format search results correctly, the system checks this record index. If you decide to change the record index of the Solutions search collection, you will also need to change the underlying code.

Note. To be searchable, an object must have a search index template that defines the fields included in the search collection. PeopleSoft delivers search index templates for solutions, cases, and troubleshooting scripts.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Setting Up Search Collections,” Understanding PeopleSoft CRM Searching

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Setting Up Search Collections,” Search Index Templates

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Setting Up Correspondence Templates,” Template Architecture

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

Solution History

Solutions History is a system-delivered action type. Solutions History logs information into the History Page of the Solution component. This is a solution-specific action and cannot be used for other applications. You can determine which policy caused the history item to be logged since the policy name appears in the history grid. The details can contain terms, which are resolved at runtime. This action is usually invoked after a solution is saved.

The system uses Active Analytics Framework (AAF) to create solution history items. Terms are managed in the AAF data library. They point to disparate pieces of data residing in places like data warehouses, external databases, or operational environments. They are metadata that provide information about the physical data and can be resolved into actual data to be used in PeopleSoft CRM. When users send template-based letters or email, the system merges both static text and resolved data into the template to produce the final correspondence.

See Also

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

Setting Up Solution Management Prompt Tables

To setup solution libraries, use the Solution Library Setup (RC_SOLN_LIB_SETUP) and Solution Relationship Table (RC_SOLN_RLT_TBL) components.

This section discusses how to:

- View search record types.
- Define solution relationship types.

- Define solution libraries.

Note. The Solution History Setup component is no longer in use.

Pages Used to Set Up Solution Management Prompt Tables

| Page Name | Object Name | Navigation | Usage |
|----------------------------|-------------------|---|--------------------------------------|
| Search Group Setup | RC_SRCH_GRP_SETUP | Set Up CRM, Product Related, Solution, Search Group Setup, Search Group Setup | View search record types. |
| Solution Library Setup | RC_SOLN_LIB_SETUP | Set Up CRM, Product Related, Solution, Solution Library, Solution Library Setup | Create solution libraries. |
| Solution Relationship Type | RC_SOLN_REL_TYPE | Set Up CRM, Product Related, Solution, Solution Relationship Type, Solution Relationship Type | Define how solutions can be related. |

Viewing Search Record Types

Access the Search Group Setup page.

Solution Relationship Type page

Solution Relationship Type Enter a unique identifier for the relationship type.

Relationship Name and Relationship Description Enter a short and long description of the relationship. The short description appears on the pages where you establish and review solution relationships.

Defining Solution Libraries

Access the Solution Library Setup page.

Solution Library Setup page

Name Enter a library name. If this library is associated with the library FAQ, then the name you enter is exposed to self-service users in the Customer Care - Frequently Asked Questions page.

| | |
|---------------------------------------|---|
| Searchable in Solution Advisor | Select to let Solution Advisor users select this library for searching. |
| Default Libraries Selected | Select if you are adding default libraries to the page. |
| Solution Library Defaults | <p>A solution is always owned by a single library, but it can also be associated with other secondary libraries. The library defaults is a list of secondary libraries.</p> <p>To set up this library so that it is available for selection in the self-service Frequently Asked Questions page, enter <i>FAQ</i> as a secondary library.</p> |

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “Configuring Self-Service Applications”

Defining Record-Based Search Index Templates

Define search index templates for the PeopleSoft CRM search collection. Use the Search Index Template page to define record-based search index templates and identify record fields to include in the search collection.

The Search Index Template page displays the collection that the search index template is associated with and is used to establish search collections and parameters that are used to build them on the Search Settings page.

Select the fields to include in the collection as searchable fields. When you configure solution search groups, only these fields are available for field-level searching.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “Setting Up Search Collections,” Defining Record-Based Indexes

Setting Up Solution History Tracking

Use AAF to define which events are captured in a solution’s history.

See Also

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

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

CHAPTER 3

Managing Solutions

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

- Create solutions.
- Relate solutions automatically.
- Update solution usage counts and linkages.
- Merge similar solutions.

Understanding Solutions

Solutions are resolutions to problems. A well-established set of predefined solutions for common problems helps resolve customer problems quickly and efficiently.

This section discusses:

- Solution creation.
- Solution deactivation.
- Solution use in PeopleSoft CRM applications.
- Solution usage counts and linkages.

Solution Creation

Solutions can be created manually or by merging solutions. You can create solutions:

- When a user creates a new text resolution for a case.

Within PeopleSoft call center applications and PeopleSoft Integrated FieldService users can use solutions to explain how problems were resolved for cases and service orders. When this occurs, the system uses the text to create a new solution of type *Adhoc*. Using PeopleSoft ERMS (email response management system) users can also attach solutions to emails in a way that's similar to the method users would use to attach solutions to cases and service orders. In quality management, users can only search solutions. They may not attempt or associate them to defects.

- When a self-service user closes a call center case using a predefined reason.

If you do not associate solutions with the case closure reasons that you create, then the first time a self-service user closes a case using one of the predefined reasons, the system uses the reason description to create a new solution of type of *Canned*. The system associates this solution with the reason.

The only way to edit a solution is through the Solution component.

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “Configuring Self-Service Applications,” Associating Solutions with Reasons for Closing Cases

Solution Deactivation

Over time, even a well-managed solution set can end up with similar or duplicate solutions.

You deactivate a solution by giving it an expiration date. When you run the Update Solution Usage Counts process, the system sets the solution status to *Expired* in all solutions with dates passed the expiration dates.

You can associate an expired solution with a replacement solution. This is useful for solutions that explain a problem or suggest a temporary fix without resolving the problem. When a true solution becomes available, you can give the temporary solution an expiration date and cross-reference the new solution.

The ability to give a solution an expiration date is particularly important in call center applications. This is because there may be cases associated with a solution, and deleting or modifying the original solution compromises the data integrity. (Expired solutions that are associated with cases are still accessible from those cases, but they are no longer found by the solution search process.)

When you merge solutions, you create a master solution that supersedes one or more similar solutions. The status of the superseded solutions changes to *Superseded*, and the superseded solutions cross-reference the new master solution.

Solution Use in PeopleSoft CRM Applications

Solutions can apply to problems tracked through service orders, call center cases, defects and resolutions, and email. Field service technicians and call center agents use solutions differently.

Using Solutions in PeopleSoft Integrated FieldService

PeopleSoft Integrated FieldService users may view existing solutions from service orders and add new ones as they resolve problems. PeopleSoft Integrated FieldService tracks which solutions are used for specific service orders. Field service technicians can both view solutions and enter new ones.

Using Solutions in PeopleSoft Call Center Applications

PeopleSoft Support, PeopleSoft HelpDesk, and PeopleSoft HelpDesk for Human Resources users can relate solutions to cases.

PeopleSoft call center applications track not only the final solution to a case, but also failed solutions and other solutions considered. By tracking solution usage, you capture valuable information about your solution set.

Call center applications track solution usage by associating solutions to cases and using the solution Status field to indicate whether the solution solved the case. The interface is different in the agent-facing case page and the self-service case page, but the underlying data structures are the same for all users.

Using Solutions in Quality Management

Quality management enable you to track both the final solution (the one that resolved the caller’s problem) and other solutions that were considered. By tracking all solution usage, you capture valuable information about the effectiveness of your solution set.

Using Solutions

Both field service technicians and call center users (agents and self-service users) can search for solutions using the Solutions page. Solutions for cases, service orders, and email provides search functionality, including the ability to associate a solution with the case, service order or email from which the search originated.

When you use Solutions page to search for solutions, search results are ranked by relevance. Relevance scores range from 1 to 100, with 100 representing the highest relevance.

In addition PeopleSoft provides a suggested solutions functionality which uses Natural Language Processing (NLP). This is done using a third-party software application called Banter. NLP enables PeopleSoft CRM applications to automate certain business tasks by running concept-based content analysis on information it receives and providing appropriate suggestions that can be used to drive business processes.

Over time the knowledge base matures with numerous established categories. The system associates each category with a significant number of concepts. When NLP receives a request to suggest a solution to solve a case or service order it:

1. Extracts concepts from the case.
2. Scans the knowledge base for categories (solutions) that have matching concepts.
3. Sends the solutions back to the case or service order as suggestions.

A solution's relevance score is calculated based on how well the search criteria match the solution. The search index template for solutions determines which fields are searched to determine if there is a match.

Call center agents have additional ways of finding solutions for a case. They can or access the Solutions page and:

- Search the solutions on the Frequently Used Solutions page by product, by error code, or by category, type, and detail.
- Search for solutions on the FAQ (frequently asked questions) page.
- Search for solutions on the Suggested Solutions page

Note. Suggested Solutions requires an additional purchase of Banter's NLP application.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Setting Up Natural Language Processing," Understanding NLP

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Setting Up Search Collections"

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Working with My Service Orders"

[Chapter 4, "Using Solutions," page 35](#)

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, "Managing Cases"

Solution Usage Counts and Linkages

Because PeopleSoft call center and field service applications enable you to track the application of a solution to cases and service orders, the system can track resolution-related metrics for each solution.

This table describes the resolution metrics that are tracked:

| Number | Description |
|-------------------------------------|---|
| Solved count | <p>Indicates how many cases or service orders the solution has resolved.</p> <p>This number is informational only; Solution Advisor displays this number to help you determine a solution's potential.</p> <p>This number increases by one every time that you set a solution status to <i>Successful Resolution</i>. The number decreases by one if you change the status of a solution formerly designated as successful.</p> |
| Usage count | <p>Indicates how many cases or service orders that the solution has been associated with, regardless of whether the solution was successful.</p> <p>This number is a minor factor in determining the relevance score when you use Solution Advisor to search for solutions.</p> <p>This number increases by one every time that you associate the solution with a case or service order. The number decreases by one if you change the solution status to <i>Withdrawn</i>.</p> |
| Usage count by product | <p>Indicates how many times the solution resolved cases or service orders for the products that are associated with the solution (these products are listed on the Related Actions page in the Solution component).</p> <p>This number is used to determine which solutions appear on the Frequently Used Solutions page.</p> |
| Usage count by error | <p>Works like usage count by product, but is based on the error message recorded for a case rather than on the product recorded for a case. This usage count pertains to the Frequently Used Solutions page and is used the same way that it is used for products.</p> |
| Usage count by category/type/detail | <p>Works like usage count by product, but is based on the category, type, and details recorded for a case rather than on the product recorded for a case. This usage count pertains to the Frequently Used Solutions page and is used the same way that it is used for category, type, and details.</p> |

The system normally maintains the solved count and the (overall) usage count by increasing and decreasing the values as you work with solutions. But you can reset the counts based using either a specified date range or all dates. To do this, run the Update Solution Usage Counts process. This process is also the only mechanism for updating the usage count by product, error, or category/type/detail.

Creating Solutions

To define solutions, use the Solution (RC_SOLUTION) component.

This section discusses how to:

- Define solutions.

- Track notes and attachments.
- Identify secondary solution libraries.
- Manage relationships with cases, products, errors, and other solutions.
- Manage relationships with service orders, products and other solutions.
- Relate solutions.
- View solution history.

Pages Used to Create Solutions

| Page Name | Object Name | Navigation | Usage |
|----------------------------|--------------------|--|---|
| Solution | RC_SOLN_DETAILS | Solutions, Solution, Solution | Create and deactivate solutions. |
| Solution - Notes | RC_SOLN_NOTES | Solutions, Solution, Notes | Add notes or attachments. |
| Solution - Libraries | RC_SOLN_LIBRARY | Solutions, Solution, Libraries | Identify libraries to which the solution belongs. When users search for solutions using Solution Advisor, they can choose which libraries to search. |
| Solution - Related Actions | RC_SOLN_SIMILAR | Solutions, Solution, Related Actions | Review the solutions, cases, products, and errors, and category/type/detail, service orders, and business projects that are related to this solution, and create relationships with other solutions and products. |
| Relate Existing Solution | RC_SOLREL_TYPE_SEC | Click the Relate an Existing Solution button on the Case Related Actions page. | Identify a related solution and the relationship type. Note. This page is used for the both the case and service order related actions. |
| Solution - History | RC_SOLN_HISTORY | Solutions, Solution, History | Review a history of important events in the life of the solution. |
| Solution Summary | RC_SOLN_SUMMARY | Click the Summary link on the Solution page. | View solution summary information for the current solution. |
| Solution Summary | RC_SOLN_SUMMARY_RL | Click the solution ID for a related solution on the Solution - Related Actions page. | View solution summary information for a solution related to the current solution. |

Defining Solutions

Access the Solution page.

Solution

Save Refresh Personalize

Solution ID 301042 **Usage Count** 0
Summary No Hot Water in Washing Machine **Solved Count** 0

Solution Notes Libraries Related Actions History

Details

*Type Standard Library Commercial Appliances
 *Status 4 - Active Include in F.A.Q.
 *Visibility All [Summary](#)
 Superseded by Expired or Superseded Date

Description

*Summary No Hot Water in Washing Machine
 Keywords
 Symptoms Washing machine water will not get hot
 Details Some washing machines allow hot water to enter only during certain cycles. Others intermittently allow hot and cold to enter, to temper the temperature of the water. Consult your owner's manual if you are unsure about whether the machine is acting abnormally.
 If you're sure the machine isn't working the way it used to--or should--try these tests:
 Is the hot water turned on? If not, turn it on.
 Is the washer getting cold water but no hot water? If so, check to see if the control panel settings are correct.
 Is there hot water coming through the proper hose? If not, check to see if the screen

Solution page

Note. If you change the solution's type, you must rerun the Build Search Collection process to update the solution set. This provides users with accurate search results when trying to locate solutions to problems.

Solved Count and Usage Count

Displays the number of cases that the solution is associated with and the number of cases that the solution successfully resolved. These numbers are updated when you run the Update Solution Usage Counts process.

Type

Normally, select either *Standard* or *Workaround*.
 Solutions created when agents enter an independent text resolution are given the type *Adhoc*. You can convert these to standard solutions by changing the type.
 Solutions created when a agent or technician uses external content to resolve a case or service order are given a solution of type of *Link*. *You can't manually create a solution of type of Link*.
 Solutions created when self-service users choose predefined case closure reasons are given the type of *Canned*.

Library

Select the solution's primary library. This library is considered the solution's owning library. Libraries are defined on the Solution Library Setup page. The case Solution Advisor searches solutions by library.

Status

Select from:

Draft: When a new adhoc solution is added to a case, the system creates a solution behind the scenes with a solution type of *Adhoc* and a solution status of *Draft*. Adhoc solutions, however, are not accessible through Solution Advisor.

Submitted for Review: When an agent clicks the Submit button on the Resolution Details page, the system changes the solution status from *Draft* to *Submitted for Review*.

In Review: Managers use this status to indicate that the adhoc solution is being reviewed for approval or denial.

Active: The solution is approved and available to agents.

Denied: The solution is denied for general use by agents.

Expired: The solution is no longer valid as of the expired or superseded date.

Superseded: The solution is no longer valid because another solution has replaced it.

Include in F.A.Q. (include in frequently asked questions)

Selecting this check box makes the solution available on the FAQ tab on the agent facing Case page. It is not used in the self-service FAQ functionality. The self-service FAQ set up is discussed in the section on secondary libraries.

See [Chapter 3, “Managing Solutions,” Identifying Secondary Solution Libraries, page 22.](#)

Visibility

Select *All* if self-service users are allowed to view this solution. Select *Internal* to prevent self-service users from using this solution.

Note. Users cannot search for internal solutions through PeopleSoft Self Service applications. If an internal solution is added to an agent facing case, however, it can be viewed from self service once it’s added to the case.

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

Summary

This section has both a link and an enterable field called Summary. To view the Solution Summary page, click the link. Use the enterable field to enter a short description of the solution.

Path Detail

The system displays this field when the type is File or Link. It includes a URL to the website or file where a solution resides.

Superseded By

When the solution status is *Superseded*, identify the replacement solution in this field.

Selecting a replacement solution automatically sets the status to *Superseded*. Selecting a status other than *Superseded* clears the Superseded By field.

When you merge solutions using the Merge Similar Solutions page, the system sets the status to Superseded and identifies the replacement solution automatically.

Expired or Superseded Date

Enter the date the status was set to either *Expired* or *Superseded*.

As delivered, the search index templates for solutions exclude solutions with an expired or superseded date after the collection build date. Therefore, these solutions are not accessible through Solution Advisor.

- Keywords** Enter search keywords or a phrase for the solution.
- Symptoms** Enter a description of the problem that the solution addresses.
- Details** Enter the full explanation of how to solve the problem.

See Also

Chapter 2, “Setting Up Solution Management,” page 7

Tracking Notes and Attachments

Access the Solution - Notes page.

The Solution - Notes page uses the standard PeopleSoft CRM interface for working with notes and attachments.

Attachments are visible on solution summary pages, including self-service pages. Therefore, you would normally want all attachments (especially those with visibility of *All*) to be files that a caller uses when applying the solution: for example, DLL files or BAT files that fix software problems.

See Also

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

Identifying Secondary Solution Libraries

Access the Solution - Libraries page.

Solution

Save Refresh [Personalize](#)

Solution ID 301042 **Usage Count** 0
Summary No Hot Water in Washing Machine **Solved Count** 0

Solution / Notes / **Libraries** / Related Actions / History

Solution Library Defaults

| Include | Library Name | Description |
|-------------------------------------|-------------------------------|---|
| <input type="checkbox"/> | Air Cooling Systems | |
| <input type="checkbox"/> | Appliances | |
| <input checked="" type="checkbox"/> | Commercial Appliances | Includes Disposals, Dishwashers |
| <input type="checkbox"/> | Cold Storage - Freezer/Fridge | |
| <input type="checkbox"/> | Dishwasher | Dishwasher |
| <input type="checkbox"/> | FAQ | Frequently Asked Questions for Industrial Products data set |
| <input type="checkbox"/> | Lab Units | Lab Units |
| <input type="checkbox"/> | Refrigerators/Freezers | |
| <input type="checkbox"/> | Field Appliance Service | Library primary used by Appliance Repair Field Technicians. |
| <input type="checkbox"/> | Self-Service Troubleshooting | |

Solution - Libraries page

Libraries are only applicable to call center applications.

Solution Library Defaults If the primary library, which appears on the Solution page, is associated with any secondary libraries, those secondary libraries are listed in this grid. If *FAQ*

appears, then the solution's primary library (and therefore the solution, if its visibility is set to *All*) is visible to customers in the self-service Frequently Accessed Questions page.

Select secondary libraries to associate with the current solution. Secondary library association do not affect searching or the availability of the solution as a FAQ. The only reason to give solutions secondary associations with libraries is if your organization designs administrative processes or reports based on secondary associations.

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “Configuring Self-Service Applications”

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “Working with Self-Service Application Transactions”

Managing Relationships with Cases, Products, Errors, Service Orders and Other Solutions

Access the Solution - Related Actions page.

Solution

Save Refresh Personalize

Solution ID 301042 **Usage Count** 0
Summary No Hot Water in Washing Machine **Solved Count** 0

Solution Notes Libraries **Related Actions** History

Solutions [Issues](#) [Products](#) [Errors](#) [Category/Type](#) [Service Orders](#) [Business Projects](#)

Related Solutions

| Relationship Type | Solution | Solution Summary | Link Source | Datetime Added | |
|-------------------|------------------------|---|-------------|-------------------|--|
| Similar | 301035 | Removing Yellow and Brown discoloration from the Dishwasher | MAN | 06/23/2006 2:38PM | |

Relate an Existing Solution

Solution - Related Actions page

Click the links below the tab to see different types of related actions in the grid.

Solutions

This grid lists all solutions that are related to the current solution. You can relate solutions manually or create solution relationships by running the Related Solution process.

Click the Relate an Existing Solution button to access the Relate Existing Solutions page. Use this page to establish a relationship between the currently displayed solution and an existing solution.

This information appears for each related solution:

- The relationship type.
- The solution ID and summary.
Click the solution ID to view the solution summary.
- The link source: MAN (manually created) or SYS (system-created).

- The date and time the relationship was created.

Note. You cannot relate an existing solution to an adhoc solution.

Issues

Case relationships, or issues, are relevant only for call center applications. When you resolve a case, the system adds the newly resolved case to the solution's list of related cases.

This grid lists all cases to which the solution has been applied, regardless of whether the solution solved the case. The system maintains the list of related cases in real-time.

This information appears for each related case:

- The case ID and summary.
Click the case ID to transfer to the case.
- A resolution status that indicates whether the solution resolved the case.

Products

This grid lists all products for cases that the solution successfully resolved. You can relate products manually or use the Update Solution Usage Counts process to create additional relationships automatically.

This information appears for each related product:

- The product ID and description.
- A solved count that indicates the number of cases with this product that the solution resolved.
- The link source: MAN (manually created) or SYS (system-created).
- The date and time the relationship was created.

Errors

Errors are relevant only to call center applications. This grid lists all errors for cases that the solution successfully resolved. You cannot add rows of data manually; you must use the Update Solution Usage Counts process to create additional relationships.

This information appears for each related error:

- The error ID and error message.
- A solved count that indicates the number of cases with this error that the solution resolved.
- The link source: MAN (manually created) or SYS (system-created).
Currently, you cannot create manual relationships.

Category/Type

Categories, specialty types, and details are relevant only for call center applications. This grid lists all categories, types, and details for cases that the solution successfully resolved. You can change the specialty types and details listed for the category by selecting new values from the drop-down list boxes for the two fields.

This information appears for each related category/type/detail:

- The category, specialty type, and detail.

- A solved count that indicates the number of cases with this category/type/detail combination that the solution resolved.
- The link source: MAN (manually created) or SYS (system-created).

Currently, you cannot create manual relationships.

Service Orders

Service order relationships are relevant only for PeopleSoft Integrated FieldService applications. When you complete a service order, the system adds the service order to the solution's list of related service orders.

Business Projects

You can set up an AAF policy to launch a business project after a solution is saved for a case or service order. The business project is typically used to send notifications to solution managers or send worklist entries to specific employees. This grid lists all business projects associated with the solution.

This information appears for each business project that is related to the solution:

- The business project summary and status.

To access the Business Project Status page, click the View Details\Transfer icon for the Related Business Project.

- The date the business project was created and the person who created it

See Also

[Chapter 3, "Managing Solutions," Relating Solutions Automatically, page 26](#)

[Chapter 3, "Managing Solutions," Updating Solution Usage Counts and Linkages, page 28](#)

[Chapter 4, "Using Solutions," Understanding Case, Service Order, and Defect Resolution, page 35](#)

Relating Solutions

Access the Relate Existing Solution page.

Relate Existing Solution page

- | | |
|-----------------------------------|--|
| Solution ID | Select the solution to relate to the current solution. |
| Solution Relationship Type | Select from the values established on the Solution Relationship Type page. |
| OK | Click this button to establish the relationship and return to the Solution - Related Actions page. |

See Also

Chapter 2, “Setting Up Solution Management,” Defining Solution Relationship Types, page 11

Viewing Solution History

Access the Solution - History page.

Solution

Save Refresh Personalize

Solution ID 301042 **Usage Count** 0
Summary No Hot Water in Washing Machine **Solved Count** 0

Solution Notes Libraries Related Actions **History**

Solution History Customize Find View All First 1-2 of 2 Last

| Date | Policy Name | Action Taken | Changed By |
|-------------------|-------------|-----------------------------|------------|
| 06/23/2006 2:42PM | | Solution Status has Changed | Stu Marx |
| 06/23/2006 2:42PM | | Solution Status has Changed | Stu Marx |

Solution - History page

Policy Name

Displays the name of the policy that caused the history item to be logged. This information is usually recorded after the solution is saved.

Note. The components present in Active Analytics Framework (AAF) are used to build policies. The information that appears on this page is triggered after the solution is saved.

Action Taken

Displays the name of the event. The description of the action comes from the description of the policy established in AAF.

Changed By

The person who made the change that triggered the event.

See Also

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

Relating Solutions Automatically

This section discusses how to create solution relationships automatically.

Page Used to Relate Solutions Automatically

| Page Name | Object Name | Navigation | Usage |
|--------------------------|----------------|---|---|
| Update Related Solutions | RC_REL_SOL_RUN | Solutions, Update Related Solutions, Update Related Solutions | Run the Related Solutions (RC_RELA_SOL) process, which loops through every solution in the system. For each iteration of the search, the system creates relationships of type <i>Similar</i> between the base solution and similar solutions. |

Creating Solution Relationships

Access the Update Related Solutions page.

Update Related Solutions page

The RC_RELA_SOL application engine process runs verity search against the summary of all solutions (specified by in the Effective Dates field) that are included in the process. For each matching solution that returns, this similar solution is linked to the base solution as related solution.

Adhoc solutions are excluded from this process.

- Score** Enter a score. When the system searches for similar solutions, solutions with a relevance score at or above the level that you specify here are considered a match.
- Rows to return** Enter the maximum number of solutions returned by the search process, and therefore the maximum number of solutions that will be related to the base solution.
- Effective Dates** Select *All* to include all solutions in the process.
Select *From* and *Through Dates* to enter from and through dates to limit search results to solutions created during the specified date range.

See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Updating Solution Usage Counts and Linkages

Update usage counts using the Update Solution Usage Counts process.

Page Used to Update Solution Usage Counts and Linkages

| Page Name | Object Name | Navigation | Usage |
|------------------------------|------------------|---|---|
| Update Solution Usage Counts | RC_SOLN_RUN_CNTL | Solutions, Update Solution Usage Counts, Update Solution Usage Counts | Run the RC_SOLN_USAG Application Engine process, which updates the solved count, usage count, and usage count by product for all solutions in the database. |

Updating Usage Counts

Access the Update Solution Usage Counts page.

Update Solution Usage Counts page

Running this process updates the usage counts that you select. It also updates the solution status to *Expired* for solutions that have had an expiration date in the past.

Solution Usage Counts

| | |
|---|---|
| Solution Usage Counts | Select to update usage counts and the solved counts. |
| Solution Usage by Product | Select to update solution counts by product. The process does not affect existing product relationships where the link source is MAN. |
| Solution Usage by Error | Select to update solution counts by error message. The process does not affect existing error relationships where the link source is MAN. |
| Update Solution Usage by C/T/D (update solution usage count by category/type/detail) | Select to update solution counts by category, specialty type, and detail. |

Create Solution Linkages

| | |
|---|--|
| Link Solution Products | Select to update the related products list for all solutions. The system creates relationships between cases and the products in the cases that the solution solved. It also creates relationships between service orders and the products in the service orders that the solution solved. |
| Solution Error Link | Select to update the related errors list for all solutions. The system creates relationships between cases and the errors in the cases that the solution solved. |
| Solution Cat/Typ/Det Link (solution category/type/detail link) | Select to update the related categories, types, and details lists for all solutions. The system creates relationships between cases and the category/type/details combination in the cases that the solution solved. Category/type/details counts are based on unique combinations of all three fields. |

Effected Dates

These fields affect solution usage counts, not solution linkages.

| | |
|-------------------------|---|
| All | Select to count every use of the solution. |
| From and Through | Select to count solution usage during a particular date range. If you select this option, specify the date range. |

See Also

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Merging Similar Solutions

This section discusses how to:

- Search for similar solutions.
- Select solutions to merge.

- Perform the merge.
- Search for solutions.

Pages Used to Merge Similar Solutions

| Page Name | Object Name | Navigation | Usage |
|--|--------------------|--|---|
| Merge Similar Solutions | RC_FIND_SIMLR_SOLN | Solutions, Merge Similar Solutions, Merge Similar Solutions | Search for solutions similar to a solution that you identify. |
| Merge Similar Solutions - Search Results | RC_FIND_SSOLN_RSLT | Click the Search Similar Solutions button on the Merge Similar Solutions page. | Review search results and select solutions to merge. |
| Merge Similar Solutions - Select Master Solution | RC_FND_SELECTMASTR | Click the Merge Solutions button on the Merge Similar Solutions - Search Results page. | Select a solution to use as the master solution and complete the merge. |
| Solutions Search | RB_SOLUTION_SEARCH | Solutions, Solutions Search, Solutions Search, Advanced Search | Search for solutions based on the content of an existing solution. |

Searching for Similar Solutions

Access the Merge Similar Solutions page.



Merge Similar Solutions page

- SetID** Select the setID of the solutions to be merged.
- Solution ID** Select the solution that you want to use to search for similar solutions.
- Include Solution Description** Select to search for similar solutions based on the description of the solution that you've identified. The system searches all the fields in the search collection.
- Include Symptoms** Select to search for similar solutions based on the symptoms that you entered in the Solution Summary page for the solution that you've identified. The system searches all the fields in the search collection.
- Search Similar Solutions** Click to initiate the search for similar solutions. Results appear on the Merge Similar Solutions - Search Results page.

See Also

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

Selecting Solutions to Merge

Access the Merge Similar Solutions - Search Results page.

Merge Similar Solutions

Search Results

SetID COM01 **Solution ID** 100003

Customize | Find | View All |  First Last

| Select | Score | Solution ID | Summary | Added By | Date Added |
|--------------------------|-------|-------------|---|--------------|-------------------|
| <input type="checkbox"/> | 80% | 100003 | Connections get dropped while driving. | Allen,Edward | 12/14/2001 5:49AM |
| <input type="checkbox"/> | 11% | 301019 | Call Forwarding Issues | Allen,Edward | 01/28/2002 1:04PM |
| <input type="checkbox"/> | 5% | 301006 | Adding additional representatives to an existing account. | Allen,Edward | 12/14/2001 7:15PM |
| <input type="checkbox"/> | 5% | 301022 | Busy signal when dialing long distance | Allen,Edward | 01/28/2002 1:06PM |
| <input type="checkbox"/> | 5% | 301026 | Network Connection down | Allen,Edward | 01/28/2002 1:08PM |
| <input type="checkbox"/> | 5% | 301027 | Reboot DSL Modem to resolve light status | Allen,Edward | 01/28/2002 1:08PM |
| <input type="checkbox"/> | 5% | 301292 | What is the difference between Bridging and PPP (Point-to-Point)? | Allen,Edward | 10/28/2002 4:27PM |

[Select All](#) [Clear All](#)

 [Return To Search](#)

Merge Similar Solutions - Search Results page

- Select** Select to identify the solutions to merge. Use the Select All and Clear All links as data entry shortcuts.
- Score** Displays the relevance score calculated by Verity, which indicates how closely the solution matches the solution that you started with.
- Merge Solutions** After you've selected the solutions to be merged, click to continue the merging process. The selected solutions appear on the Merge Similar Solutions - Select Master Solution page, where you can select one solution as the master solution and complete the merge.
- Return to Search** Click to return to the Merge Similar Solutions page.

Performing the Merge

Access the Merge Similar Solutions - Select Master Solution page.

Merge Similar Solutions

Select Master Solution

Customize | Find | View All | [Grid Icon] First [Left Arrow] 1-2 of 2 [Right Arrow] Last

| Select | Score | Solution ID | Summary | Added By | Date Added |
|-------------------------------------|-------|-------------|--|--------------|-------------------|
| <input checked="" type="checkbox"/> | 80% | 100003 | Connections get dropped while driving. | Allen,Edward | 12/14/2001 5:49AM |
| <input type="checkbox"/> | 5% | 301026 | Network Connection down | Allen,Edward | 01/28/2002 1:08PM |

Use Selected As Master Create New Solution [Return To Search](#)

Merge Similar Solutions - Select Master Solution page

The column headings on this page are identical to those on the Merge Similar Solutions - Search Results page.

Select one of the solutions listed before you click one of these page elements:

- Use Selected as Master** Click to merge the solutions using the selected solution as the master solution. Attachments and products associated with the expired solutions are added to the master solution.
- Create New Solution** Click to clone the selected solution and merge the solutions using the newly created solution as the master solution. Attachments and products associated with the expired solutions are added to the new master solution.
- Return to Search** Click to return to the Merge Similar Solutions page without merging solutions.

When you merge solutions, all solutions other than the new master solution (either the selected solution or its clone) expire as of the date that you perform the merge. Each expired solution identifies the new master as the superseding solution, including the selected solution, if you cloned it to create the new master.

Searching for Solutions

Access the Solutions Search page.

Solutions Search

Search Criteria

With all the Words

With the Exact Phrase

With any of the Words

Without the Words

Use Word Variations

Rows to Display

[Basic Search](#)
[Search Tips](#)
[Preferences](#)

Search Domains

Solution with Products

Fields

| | | |
|--|---|--|
| <input checked="" type="checkbox"/> Datetime Added | <input checked="" type="checkbox"/> Added By | <input checked="" type="checkbox"/> Last Modified |
| <input checked="" type="checkbox"/> Last Maintained By | <input checked="" type="checkbox"/> SetID | <input checked="" type="checkbox"/> Solution Status |
| <input checked="" type="checkbox"/> Solution Description | <input checked="" type="checkbox"/> Solution ID | <input checked="" type="checkbox"/> Solution Summary |

Rows to Display

[Basic Search](#)
[Hide Search Options](#)
[Search Tips](#)

Solutions Search page (1 of 2)

| Search Results | | | | Customize Find | First <input type="text" value="1-50 of 50"/> Last |
|----------------|-------------|--|-----------------|--|--|
| Score | Solution ID | Summary | Library | | |
| 80.00% | 301120 | How to Map a Network Printer In the Start Menu go to Start>Settings>Printers Double click the Add Printer button to launch the Add Printer Wizard. Selec... | Network Related | | |
| 78.00% | 75 | Map Network Printer Map the network Printer | CRM2 | | |
| 66.00% | 72 | Testing the Self-test verification for ITN Printers 1. Verify that the printer can print a self-test page (print a self-test page from the printer's control panel). 2. If the s... | CRM2 | | |

Solutions Search page (2 of 2)

Search Criteria

Use the fields in this group box to enter information about the solution for which you are searching.

Note. For information on the way that the system uses the various fields in this section for solution searching, click the Search Tips link. To display the page to match your personal preference, click the Preferences link.

Use Word Variations

Select either *Alternate spellings* or *Include Synonyms* to indicate to the system that you want it to also look for solutions based on different spellings or words that are similar to the ones that you entered.

Rows to Display

Select the number of rows that you want the system to display after you click Search.

More Search Options

Click this link to display a list of check boxes that you can select to search by date and time added, last maintained by, solution description, added by, setID, solution ID, last modified, solution status, and solution summary.

Search Domains

Select the fields that you want the system to use to search for solutions. Before you click Search, however, you must enter the criteria by which you want the system search for the solution in the Search Criteria section at the top of the page.

For example, if you know the ID of the solution for which you were searching, you could enter it in one of the fields in the Search Criteria section and then select the Solution ID check box and click Search to locate the solution.

Or, if you know the date that the solution was last modified, you could enter the date in one of the Search Criteria fields, select the Last Modified check box and then click Search to find the solution.

Search Results**Summary**

Click the link under the summary field to go to the Solution page, where you can view the specifics of the solution, including usage counts, solved counts, date created, and so on.

CHAPTER 4

Using Solutions

This chapter provides an overview of case, service order, and defect resolution and discusses how to find and attempt solutions.

Note. PeopleSoft's email response management system (ERMS) and many of its self-service applications also use solutions.

Understanding Case, Service Order, and Defect Resolution

PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, Quality Management and Integrated FieldService applications enable you to track both the final solution (the one that resolved the caller's problem) and other solutions that were considered. By tracking all solution usage, you capture valuable information about the effectiveness of the solution set.

This section discusses:

- Resolved cases, service orders, and defects.
- Allowing multiple resolutions to resolve a case, service order, or defect.
- Attempted solutions.

Note. Currently, the style.lex file that comes with PeopleTools does not include special characters and it is not in the directory from which CRM copies style files. The BAT file that CRM constructs has a command to copy style files from `<PS_HOME>\verity\winx86\common\style\`. However, since PeopleTools does not put the style.lex file in the same directory with other style files and the delivered style.lex file does not include special characters, users cannot search for solutions using special characters.

Resolved Cases, Service Orders and Defects

Solutions describe the ways you might be able to resolve the caller's problem. A solution can succeed or fail. When a solution resolves a case, service order, or defect, it is considered a resolution. Resolutions exist in the context of a case, service order, defect, or email only.

A resolved case is a case that's associated with a successful solution. A resolved case is not necessarily a closed case; the case status is independent of the solution status. You can use the Case Defaults page to set up a default status for resolved cases. If a default status exists, the system changes the status when you resolve the case.

Note. If no default exists, an agent must update the status manually. You can, however, close a case without a successful solution. You can do this if you have a solvable action that is related on the case; so a successful resolution isn't the only way to close a case.

On a service order the field service technician can record repair actions they have attempted and identify the actions that were successful. The system feeds the successful actions data to the solution database, so that a technician's repair actions become available to other technicians. The result of these solutions when added to the solution database is that new, more efficient and effective solutions become available to the entire work force.

In PeopleSoft Quality Management, a technician can select a fix ID or search for and add a solution to indicate what they have done to resolve the customer's problem.

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, "Defining Call Center Business Units and Display Template Options"

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, "Defining Business Units in PeopleSoft Integrated FieldService"

Allowing Multiple Resolutions to Resolve a Case, Service Order, or Defect

You can use more than one solution to resolve a case, service order, or defect. If you use multiple solutions, more than one can have the status of successful.

To allow more than one successful resolution, you must configure it on the Business Unit setup pages for PeopleSoft Support, HelpDesk and HelpDesk for Human Resources. For PeopleSoft Integrated FieldService and Quality Management you do not need to configure the system to allow multiple resolutions.

Because you set up the system to close the case automatically when a solution is successful, PeopleSoft has made these modifications to this process:

- The automatic closing of the case on the solution status field is a save event.
This enables the user to change the status on more than one resolution before the case, service order, or defect is closed.
- The status field is editable even when the case is closed if the status is *In Consideration* or *Failed*, so the agent, technician, or manager can identify other solutions as successful.

The system makes any resolution with the status of *Successful* read only.

Note. This is only applicable when cases are configured to allow multiple resolutions; otherwise, the system makes all the statuses read only after the case is closed.

Attempted Solutions

This section discusses:

- Attempted solution grids.
- Methods for finding solutions.
- Resolution statuses.
- Resolution process.
- Managing attempted solutions.

Attempted Solution Grids

The Case page includes two grids, the Solutions grid and the Attempted Solutions grid. The Solutionsgrid is used to search for solutions and the Attempted Solutions grid includes solutions considered for the case.

| Select | ID | Description | Date Modified | Added By | *Status |
|--------------------------|----|---|------------------------------|----------|------------------|
| <input type="checkbox"/> | 1 | Removing Yellow and Brown discoloration from ... There is probably too much Iron or Manganese in the water. To get rid of the discoloration... | 02/01/2006 10:56:56AM PST | Stu Marx | In Consideration |
| <input type="checkbox"/> | 2 | Cleaning dishes in the Dishwasher. A lot of factors can affect the cleanliness of your dishes when the wash cycle is done: Do... | 02/01/2006 10:56:56AM PST | Stu Marx | In Consideration |

Solutions Considered for this Case grid

The Quality Management page includes a Solutions Considered for this Defect grid that lists the solutions, solution IDs, date modified and status of all solutions that may resolve the defect or implement the enhancement.

Methods for Finding Solutions

There are five ways to find and attempt potential solutions in the Solutions grid on the Solutions page for cases.

For service orders there are three ways to find and attempt potential solutions using the Solutions grid on the Solutions page.

For quality management there are two ways to find and attempt potential solutions using the Solutions Considered for this Defect grid on the Solutions page.

Note. When searching for solutions, expired solution do not show up in search result. When you expire a resolution, the user needs to create a new search collection instead of updating it to hide it from the search result.

This table describes the methods that are used to find and attempt solutions:

| Page | Tab | Description |
|----------|--|---|
| Solution | <p>Suggested Solution</p> <p>Used for cases, service orders, and quality management.</p> | <p>Select the solutions that will most likely resolve the problem and then click the Attempt or Solve button.</p> <p>The system adds the selected solutions into the Solutions Considered grid.</p> <p>Suggested Solution is using NLP search, it finds match from the NLP database based on information on case, service order or quality.</p> <p>If no result returns, the search text on this tab is a convenience way to bring agent to Search Tab for a verity search.</p> |
| Solution | <p>Search</p> <p>Used for cases, service orders, and quality management.</p> | <p>Enter text to search for solutions that might relate to the case and then click the Search button.</p> <p>Select the solutions that are most likely to resolve the problem and then click the Attempt or Solve button.</p> <p>The system adds the selected solutions into the Solutions Considered grid. You can choose to use the basic, advanced, or more search options modes when searching for solutions.</p> |
| Solution | <p>FAQ</p> <p>Used for cases only.</p> | <p>Select the library of frequently asked questions that are most likely to resolve the problem associated with the case.</p> <p>The system displays a list of solutions.</p> <p>Select a solution and then click the Attempt or Solve button.</p> <p>The system adds the selected solutions to the Solutions Considered grid.</p> |

| Page | Tab | Description |
|----------|---|---|
| Solution | Frequently Used Solution Used for cases only. | Select the type of solutions that are most likely to resolve the problem associated with the case. The system displays a list of solutions. Select a solution and then click the Attempt or Solve button. The system adds the selected solutions to the Solutions Considered grid. |
| Solution | Enter New Solution Used for both cases and service orders. | Enter text that describes the solution that you used to resolve the problem. Click the Attempt or Solve button. The system adds the selected solutions into the Solutions Considered grid. |

Resolution Statuses

Each solution attempt is associated with one of these statuses:

- *In Consideration.*
You have not suggested this solution. The solution is in the list and is available when you're ready to try it.
- *Waiting on Customer.*
You have suggested this solution, but you don't know whether the solution worked.
- *Failed Resolution.*
The caller or technician attempted the solution, but the solution did not solve the problem.
- *Successful Resolution.*
The solution solved the problem. This status can only be associated with one solution in a case. Service orders and Quality Management cases allow more than one successful resolution. When you select this status for a solution, the Case page prevents you from considering additional solutions or updating the status of other solutions. For service orders, you may consider additional solutions when a solution is marked with this status.

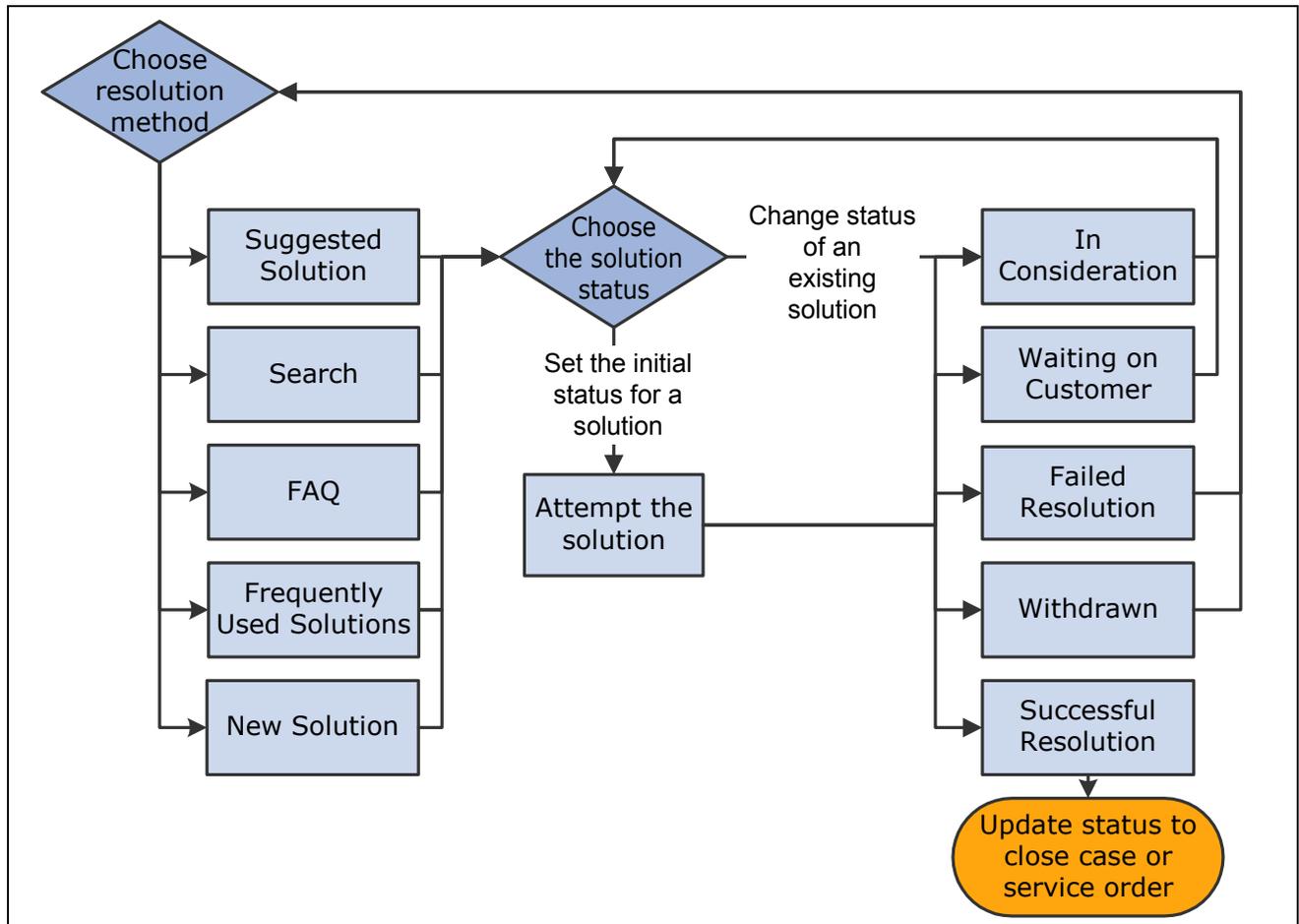
Note. Successful statuses can be applied to multiple solutions based on the way the business unit is set up. When a case is closed and multiple solutions are required, users can select other non-successful solutions as successful. When the case is reopened, however, successful resolutions are changed to failed resolutions.

- *Withdrawn.*

The solution should not have been associated with the case, service order, or defect and is to be disregarded in all solution-related metrics. Selecting *Withdrawn* does not remove the solution entirely. It informs the system that it shouldn't have been there in the first place. *Withdrawn* solutions are ignored in solution usage statistics and are not visible through self-service.

Resolution Process

This graphic illustrates the resolution process for cases. For PeopleSoft Integrated FieldService and Quality Management successful resolutions do not change the status of the service order or the defect.



Resolution process

There are other methods of attempting a solution from a page other than the Case or Service Order page. You can launch a troubleshooting guide (a type of script) directly from the solution search grid or the Related Actions page. Or, if the case is a child of another case, you can set up Active Analytics Framework (AAF) to cascade the successful resolution from the parent to the child. This is not applicable to service orders, however.

Note. With this release you can use the Case Update Action in AAF to automatically resolve a case.

Managing Attempted Solutions

Once you've added solutions to the Attempted Solutions grid for the case, service order, or defect, you can initiate one or more of these actions:

- Update the solution status.

- View the solution details.

The Solutions grids show summary information about each solution. Click the summary text to display the Solution Details page. On the Solution Details page, you can see the full text of the solution, and you can add notes or attachments to the solution.

- Email the solution.

Often the most efficient way to communicate a solution to a caller, manager, or technician is to send an email with the solution text. Attachments are not included in the email.

- Solve the case by selecting one or more solutions; then click the Solve button. This changes the status to *Successful Resolution*. Or, you can change status on the attempted solution grid directly.

Note. Solve is not available for Service Orders and Quality Management.

- View the text of the solution by selecting one ore more solution and then click the View button.
- Click the Add a New Note button to the right of the solution description to add notes to the solution.

Note. PeopleSoft Quality users can view solution details only. They cannot update solution statuses. They also cannot add resolution notes or attachments from the Solution Details page.

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “Processing Cases,” Managing Related Actions

[Chapter 2, “Setting Up Solution Management,” page 7](#)

[Chapter 3, “Managing Solutions,” page 15](#)

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

Finding and Attempting Solutions

This section provides an overview of solutions and discusses how to:

- Use suggested solutions.
- Search for solutions.
- Use FAQs to search for solutions.
- Use frequently used solutions.
- Enter new solutions.
- Email solutions.
- Review details of attempted solutions.
- View external content solutions.
- Add resolution notes and attachments.

Understanding Solutions

This section discusses:

- Suggested solutions.
- Solution advisor searches.
- FAQs.
- Frequently used solutions.
- New solution creation.
- Adhoc solutions.
- Customer notification.
- External content and Verity searching.
- How external content works.

Suggested Solutions

The Suggested Solutions tab is only available to customers who also purchase Banter, a third-party product. Banter's Natural Language Processing (NLP) engine is used to suggest which solutions may solve the problem related to the case, service order, or defects.

When you select the Suggested Solutions tab, the system calls the NLP engine and passes input parameters (case information for example) resulting in the NLP engine returning a list of suggested solutions.

When a solution is identified as successful or failed, the system sends the information to NLP so that the NLP engine can learn which solutions are successful and which ones fail. This information is sent to NLP. Every time the user accesses the Suggested Solutions page, the NLP search automatically runs to take advantage of any changes that would affect the solutions suggested.

The illustration below represents an example of how the Solution page looks when NLP returns suggested solutions for a case:

Solutions

Suggested Solutions Search New Solution

Your search returned 3 result(s).

| Select | Score | ID | Description |
|--------------------------|-------|----|---|
| <input type="checkbox"/> | 93 | 20 | Steps to measure refrigerators. Use a string to measure each dimension of your current refrigerator. Then take the string and line it up with a ruler. This should give you the correc... More like this... |
| <input type="checkbox"/> | 7 | 18 | Cleaning the condenser coil of the Refrigerator? The coil can be cleaned using a long brush (available at most hardware stores) or a vacuum cleaner. Gently nudge the brush under the unit to pull out ... More like this... |
| <input type="checkbox"/> | 4 | 19 | Steps to cut refrigerator's energy costs. The easiest way to trim your energy bill is to replace an older model with a newer one. By replacing a 15-year-old top-mount refrigerator with a new m... More like this... |

Attempt Solve View

Keywords

Search [Advanced Search](#) [Search Tips](#)
[Preferences](#) [Create New Solution](#)

Suggested Solutions tab

The Suggested Solutions tab also displays the Verity basic search fields under the results grid. This is available so that if none of the suggested solutions apply, a user can search on a text string that they enter. When the user clicks the Search button, the Verity basic search runs and brings user to the Search tab, where the system displays the search results.

You can also use the search functionality to search by solution ID. The user can enter the solution ID in the Keyword field and click search. The solutions appear in the results grid. If the customer has not purchased NLP, then the Suggested Solutions functionality is not available. The default tab delivered out of the box is the Search tab. (If NLP does not return any results, then the user is automatically directed to the Search tab).

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, “Setting Up Natural Language Processing”.

Solution Searches

The Solution page has three search modes: basic, advanced, and more search options:

- Basic Search

This is a Verity search that looks at all objects in the search collection. The system ranks the search results by percentage according to how close the match is. It contains these characteristics:

- Basic search is the default when the user selects the tab, unless the user has changed his preferences.

- The value in the Search field automatically changes to the problem summary value if it is not set yet. Click the Search button to launch a Verity search against all domains in the search collection. Domains can include solutions, cases, fixes, defects, troubleshooting guides, internet sites, intranet sites and file servers.

Note. Click the Search button to launch a Verity search against all the domains that are defined in the user's preferences. There is additional logic that the system uses to display the search text on the Case page. The system first tries to pull information from the quick code, then from the previous search (the saved search), and then the problem summary.

- When the system performs a search, the text is stored as a keyword so that the next time the user opens the page, the previously used search text is automatically entered.
 - The system displays a message listing common or stop words that were not included in the search (examples are *the, a, and, or* and so on) above the search results, if they were set as a configuration option at the component level during implementation.
- **Advanced Search**

Includes a series of text boxes used to perform a natural language internet-type search. Advance search gives you the ability to perform these types of searches:

- **With all the Words:** Works like a logical AND. All of the words must be in the text for which you are searching. The system returns all the solutions where all the words are present irrespective of which fields they are in within the record. For example, if you entered *Error 3029 Vantive*, the system does not return solutions where the record has either *Error* or *3029* or *Vantive*. The system returns solutions that have all three words in the record. Two words can be in the solution description, however, and one word can be in the product.
- **With the Exact Phrase:** The exact phrase must appear in the text for which you are searching.
- **With any of the Words:** Works like a logical OR. If any of the words in the search text appear, the system returns results.
- **Without the Words:** None of the search text entered can appear in the text for which you are searching.
- **Restrict by Product:** Enables you to restrict solutions by product. Although Restrict by Product appears in the list of solution fields in the advanced search, it is different from the other fields in the list because a solution can be related to many products, and therefore product is not a single searchable field in the Solution table.
- **Use Word Variations:** Select one of the options to expand the search using different spellings of words or synonyms.

Note. These are additional search options available, but they are delivered as hidden out of the box: *Words in a Sentence* and *Words in a Paragraph*. You can enable or disable these options through user preferences options.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Setting Up Search Collections," Configuring Search Options.

- **Rows to Display:** Controls the number of rows in the search results grid.

FAQs

The FAQ tab displays a predefined list of solutions that the agent can choose from to resolve the case. If the FAQ check box is selected during implementation on the solution setup page, then the solution qualifies as an FAQ.

The Library field contains a list of libraries with associated solutions that have been identified as FAQ.

The results grid displays a list of the solutions that have been set up for the library selected. FAQs are sorted by the date and time that they were last modified on the solution so that the user sees the most up-to-date solutions first.

Note. This feature is only used for PeopleSoft call center applications (PeopleSoft HelpDesk, Support, and HelpDesk for Human Resources).

Frequently Used Solutions

The Frequently Used Solution tab lists frequently used solutions by type: either *All*, *Category/Type/Detail*, *Error*, or *Product*.

Solutions are sorted based on their solved counts. For example, the solution that solved the most cases for the product on the current case would be first, and so on. This tab must be turned on when you are configuring the system during implementation.

For search by product to work, you need to create the system relationships between solutions and products, by running the Update Solution Usage Counts process (RC_SOLN_USAG). After that you must update the search collection by running the Build Search Collection process (RB_SRCH_BLD). The relationships between solutions and products are not included in the Verity search collection until the Build Search Collection is run.

Note. This feature is only used in PeopleSoft call center applications (PeopleSoft HelpDesk, Support and HelpDesk for Human Resources, and verticals).

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

See [Chapter 3, “Managing Solutions,” page 15](#).

New Solution Creation

If a user is unable to locate an existing solution, they can use the New Solution tab to enter a new solution. When the user enters a new solution and clicks the Attempt button, the system inserts the solution into the Attempted Solutions grid with the status of *In Consideration*. If they click the Solve button, the system inserts the solution in the grid with the status of *Successful*.

Note. The Attempt and Solve button are visible and applicable on all sections and tabs on the Solutions page, not just new solutions. This feature is not used in PeopleSoft Quality Management.

Adhoc Solutions

When the solution type is *Adhoc* and the solution status is *Draft* on the Solutions Details page the system displays a section called Submit for Review.

This new section is only used for the Case component. When a user clicks Submit to save the solution, the system also changes the solution status from *Draft* to *Submitted for Review* on the Solution page.

This indicates that the Solution is ready for manager review. PeopleSoft, however, does not deliver an AAF policy to take action or send notification when the solution status changes. You must configure an AAF policy to send a notification or create a business project to start the solution approval process.

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

Customer Notification

When a suggested solution is in the status of *Waiting on Customer* you may want to send a notification to the customer. For example, an agent suggests two solutions on an open case. One solution has the status of *In Consideration* and the other solution has the status of *Waiting on Customer*. When the agent saves the case, you could set up an AAF policy that sends a notification to the case contact with the solution details for the solution that is in the *Waiting on Customer* status.

To set up such a policy, use these parameters:

| Parameter | Value |
|---------------|--|
| Term Name | Case Resolution Status |
| Trigger Point | After a Support Case is Saved |
| Condition | Case Solution Status is equal to Waiting on Customer |
| Actions | Notify case contact via email |

Note. You can use AAF policies to send multiple notifications to the case contact when the case has more than one solution with the status of *Waiting on Customer*.

External Content and Verity Searching

Included in the Verity search options is external content searching using the intranet, internet, and file servers. The system includes external link matches in the Verity search results, if you have enabled it during your implementation.

When external content solutions appear in the search results grid, the description includes a link that opens the external content in a new window. If the external content is a file, it opens in the appropriate application. The user can turn external search on or off by selecting or clearing the external content domain on the Advanced Search - More Search Options page.

When a user selects multiple items from the searching grid, it transfers the user to the Solution Detail page. If external content is selected, it displays as a link with a description. Users can navigate into the solution to see the details or click Attempt or Solve to solve the case, service order, or defect.

How External Content Works

Whenever a technician or agent uses external content to resolve a service order or case, the system creates a solution type of *Link* or *File* in the background to represent it. The next time an external content search is used and the same content is found and used, the system checks to see whether a solution already exists for it and uses the existing solution by matching the URL or FILE path in summary.

Here's how it works:

1. Verity indexes HTTP files and documents (Word docs, text files, PDF files, and so on) in addition to regular solutions in the database.

For example you can index PeopleSoft Planet Intranet and do keyword searches on those files.

2. When you search on external content (HTTP or File) and then click an item in the results set, the system opens a new browser with the actual external content using the URL in your browser; so if you index something on the Planet PeopleSoft website, it opens the page on the website; or it will open the actual PDF or Word document.

3. When you attempt one of the solutions using external content, the system create a solution behind the scenes and then attempts the solution to the case.
4. When you attempt one of external content solutions, the system looks in the database to see if the external content has already been created as a solution.

It does this by comparing the URL of the external content to the existing solutions that were created from external content. If it has already been created, it uses the existing solution and attempts it. If it is the first time that user has attempted the external content solution and there is no existing solution for it, it creates a new solution and attempts it.

5. When you open an attempted solution that has external content on the attempted solutions grid, it opens the solution.

The system does not open the actual external content. This is different than step 2 where, if you click the external content solution from the search results grid, it opens the actual external content. In this case, it opens the solutions detail page and displays a link with the URL. If you click the URL, the system opens the actual external content.

Common Elements Used in This Section

| | |
|----------------|--|
| Select | Select the check box next to the solution that you want to either attempt, use as a solution, or view and then click the appropriate button that corresponds to the action that you want to take. |
| Attempt | Click this button to attempt the solution that you selected. The system adds the solution to the <i>Attempted Solutions</i> grid for the service order, case, or defect with the status of <i>In Consideration</i> . |
| Solve | Click this button to use the solution that you selected to resolve the issue. The system adds the solution to the <i>Solutions Considered</i> grid for the service order, case or defect with the status of <i>Successful Resolution</i> . |
| View | Click this button to view the solution that you selected. The system displays the <i>Solution Details</i> page. |
| Search | Click to search for solutions that match the search criteria or text that you entered. |

Pages Used to Find and Attempt Solutions

| Page Name | Object Name | Navigation | Usage |
|-------------------------|---|--|---|
| Solution | RF_SO_SOLN, RC_CASE_SOLN, RQ_DEFECT_SOL_LNK2 | <ul style="list-style-type: none"> • Support, Add Case, Solutions • HelpDesk, Add Case, Solutions • FieldService, Add Service Order, Solutions • Quality Management, Add Defect, Solutions | Find and attempt solutions to resolve cases, service orders, and defects. |
| Outbound Email | RB_EM_OB_ADD | Select a solution from the Solutions Considered grid and then click the Email button. | Email solution information to customers or contacts. |
| Resolution Details | RC_CASE_SOL_SUM, RF_SO_SOL_SUM, RQ_DFCT_SOL_SUM | Click a solution summary on the Case page, Service Order page, or Quality Management page. | Review details of attempted solutions. |
| Solutions | RC_SOLN_SUMMARY | Click a solution summary on the Case page, Service Order page, or Quality Management page for a external content solution of type link or file | View solution details. |
| Case - Resolution Notes | RC_CASE_RSLN_NOTE | Click the Add Resolution Note or Attachment button on the Solutions Detail page (in attempted solutions mode). | Add notes and attachments that are associated with a resolution. |

Using Suggested Solutions

Access the Solution - Suggested Solutions page.

Case 02/07/2006 12:05:38PM PST My Time Zone

Save | Set Reminder | Print | Spell Check | 360 360-Degree View | Notification | Personalize

Case ID 1
Customer Savannah Lee
Summary The Ice Maker is broken.
Open Cases 3

Status Open - New Case
Contact Savannah Lee
Contact Method 610/659-8745(2345)
Customer Value Gold★★★★

Case | **Solution (1)** | Summary | Notes (0) | Tasks (0) | Case History | Related Cases (0)

Attempted Solutions Customize | Find | First 1 of 1 Last

| Select | ID | Description | Date Modified | Added By | *Status |
|--------------------------|----|--|--------------------------|----------|------------------|
| <input type="checkbox"/> | 22 | How to fix if the refrigerator runs too long?... Before making a service appointment, answer these questions: ... | 04/11/2001 3:28:32PM PDT | | In Consideration |

L Email View Solve

Suggested Solutions Search | FAQ | Frequently Used Solutions | New Solution

Your search returned 3 result(s).

| Select | Score | ID | Description |
|--------------------------|-------|----|---|
| <input type="checkbox"/> | 18 | 29 | Steps to get odor out of the freezer. Since odors come from food, make sure all foods in your freezer are properly packaged in wrapping materials made specifically for freezers and be sure... More like this... |
| <input type="checkbox"/> | 15 | 31 | Ice maker in the Freezer not making enough ice. There are several things that can effect a freezer's ice making ability: Make sure the sensing lever is free to move up and down Be sure the water to... More like this... |

Solution - Suggested Solutions page (1 of 2)

| | | | |
|--------------------------|----|----|---|
| <input type="checkbox"/> | 12 | 16 | Steps to remove frost build-up on the inside of the refrigerator. If you have a manual defrost unit, frost build-up is normal in humid weather. Simply defrost the unit regularly during humid months and limit usage. More like this... |
|--------------------------|----|----|---|

L Attempt Solve View

Search Text The Ice Maker is broken.

Search | [Advanced Search](#) | [Search Tips](#) | [Preferences](#) | [Create New Solution](#)

Save Case | Escalate Case

Solution - Suggested Solutions page (2 of 2)

Note. The Solution tab displays the number of solutions that have been attempted.

Select the solution that you want to either attempt or that you have used to resolve the problem. To move the solution to the Attempted Solutions grid, click either Attempt or Solve. The system assigns it an appropriate status.

To email the solution to a customer, employee or agent, select the solution in the Attempted Solutions grid and click Email. The system displays the Email page or the Email Reply or Start New Thread page.

To view a solution, select it and then click View. The system displays the Solution Details page. You can also click the Summary link to open the solution detail. From there you can attempt, solve, and add notes to the solution.



Click the Add a New Note button to access the Resolution Notes page. The button changes slightly based on whether a note exists for the resolution or not.

If there are no notes attached to the resolution, the system displays the Add a New Note button. If there are already notes attached to the resolution, the system displays the View Notes button. The Add a New Note button only shows up in the Attempted Solutions grid, not in the search results grid.

Note. User should display the Suggested Solution tab only if NLP (Banter) is installed. The Suggested Solutions tab is delivered as hidden out of the box. To enable this functionality access the Display Template page for the Solution page, click the Show Section Details link, and then click the Modify Embedded Tabs link. If you are not an NLP customer you do not need to enable this functionality.

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

Searching for Solutions

Access the Solution - Search page.

The screenshot displays the 'Solution - Search' page. At the top, there is a navigation bar with tabs for 'Case', 'Solution (3)', 'Summary', 'Notes (0)', 'Tasks (0)', 'Case History', and 'Related Cases (0)'. Below this is a section titled 'Attempted Solutions' which includes a table with the following data:

| Select | ID | Description | Date Modified | Added By | *Status |
|--------------------------|--------|--|------------------------------|----------|-------------------|
| <input type="checkbox"/> | 301377 | Try decoupling the battery and then a cold reboot. | 02/06/2006 12:08:59PM PST | Stu Marx | Failed Resolution |
| <input type="checkbox"/> | 37 | There are many different causes for a computer system to lock-up, hang or freeze. The following... | 11/07/2001 3:14:15PM PST | Burt Lee | Failed Resolution |
| <input type="checkbox"/> | 37 | There are many different causes for a computer system to lock-up, hang or freeze. The following... | 07/10/2000 10:32:16AM PDT | | Failed Resolution |

Below the table are buttons for 'Email', 'View', and 'Solve'. The page also features a search section with a search criteria form, a 'Use Word Variations' dropdown, and a 'Rows to Display' dropdown. At the bottom of the search section are 'Search' and 'Clear' buttons, and links for 'Basic Search', 'Search Tips', 'Preferences', 'Create New Solution', and 'More Search Options'.

Solution - Search page (1 of 2)

Your search returned 1 result(s).

| Select | Score | Type | ID | Description |
|--------|-------|------|-----|--|
| | 89% | Case | 144 | Computer System lock-ups all the time. Computer System lock-ups all the time. More like this... |

Save Case Escalate Case

▼ **Audit History**

| | | | |
|-----------------|------------------------|-----------|------------|
| Created | 07/10/2000 10:32AM PDT | By | DVP1 |
| Modified | 02/03/2006 3:37PM PST | By | PTCDBADMIN |

Solution - Search page (2 of 2)

This page is a view of the Solution - Search page in the Advanced Search mode. There are additional search modes that you can access in addition to the Advanced Search mode. To access the Basic Search and More Options search pages, click the appropriate links. Information on using these search options is detailed in the Searching for Solutions section.

See Chapter 3, “Managing Solutions,” [Searching for Solutions, page 32](#).

Using FAQs to Search for Solutions

Access the Solution - FAQ page.

Case 02/06/2006 11:56:15AM PST My Time Zone

Save | Print | Spell Check | 360-Degree View | Notification | Send | Time Entry | Personalize

Case ID 2 **Status** Open - New Case
Customer [MMA Property Management Group](#) **Contact** [Fred Albright](#)
Summary Dishwasher is not cleaning the dishes pr... **Contact Method** 651/785-6687
Open Cases 42 **Customer Value** Gold★★★★

Case **Solution (1)** Summary Notes (0) Tasks (11) Case History Related Cases (0)

Attempted Solutions Customize | Find | First 1 of 1 Last

| Select | ID | Description | Date Modified | Added By | *Status |
|--------------------------|----|---|---------------------------|----------|------------------|
| <input type="checkbox"/> | 2 | Cleaning dishes in the Dishwasher. A lot of factors can affect the cleanliness of your dishes when the wash cycle is done: Do... | 02/06/2006 11:58:50AM PST | Stu Marx | In Consideration |

Email View Solve

Search **FAQ** Frequently Used Solutions New Solution

Frequently Asked Questions

Library

Your search returned 2 result(s).

| Select | ID | Description |
|--------|----|---|
| ✖ | 2 | Cleaning dishes in the Dishwasher. A lot of factors can affect the cleanliness of your dishes when the wash cycle is done: Do not overload the dishwasher Make sure the spray arm is not ... More like this... |

Solution - FAQ page

Library

Select the library that you want to use to search for solutions. Once you find a solution, select it and use the Attempt, Solve, or View buttons to indicate

the action that you want to take. To open the Resolution Details page, click the Summary link

Using Frequently Used Solutions

Access the Solution - Frequently Used Solutions page.

Note. Self-service users can only search on active solutions. Solutions that are categorized as either canned or adhoc do not appear in searches on the Frequently Used Solutions page for both agents and self-service users.

The screenshot displays the 'Solution - Frequently Used Solutions' page. At the top, there is a navigation bar with tabs for 'Case', 'Solution (2)', 'Summary', 'Notes (0)', 'Tasks (0)', 'Case History', and 'Related Cases (0)'. Below this, the 'Attempted Solutions' section is visible, featuring a table with columns for 'Select', 'ID', 'Description', 'Date Modified', 'Added By', and '*Status'. Two entries are listed, both with ID 37 and a status of 'In Consideration'. Below the table are buttons for 'Email', 'View', and 'Solve'. The main section, 'Frequently Used Solutions', includes a 'Type' dropdown menu set to 'All'. Below this, a search result is shown: 'Your search returned 1 result(s)'. The result table has columns for 'Select', 'Solved Count', 'ID', and 'Description'. One result is shown with ID 36, a solved count of 2, and a description about upgrading Windows. Below the result table are buttons for 'Attempt', 'Solve', and 'View'.

Solution - Frequently Used Solutions page

Type

Select the type of solution that you want the system to use for the search. Once you find a solution, select it and then click the Attempt, Solve, or View button to indicate the action that you want to take. To open the Resolution Details page, click the Summary link.

Entering New Solutions

Access the Solutions - New Solution page.

The screenshot displays the 'Solutions - New Solution page' with the following components:

- Navigation:** Case, **Solution (3)**, Summary, Notes (0), Tasks (0), Case History, Related Cases (0).
- Attempted Solutions Table:**

| Select | ID | Description | Date Modified | Added By | *Status |
|--------------------------|--------|---|------------------------------|----------|-------------------|
| <input type="checkbox"/> | 301377 | Try decoupling the battery and then a cold reboot. Try decoupling the battery and then a cold reboot. | 02/06/2006 12:08:59PM PST | Stu Marx | Failed Resolution |
| <input type="checkbox"/> | 37 | Basic causes for Computer System lock-ups, hangs or freezes There are many different causes for a computer system to lock-up, hang or freeze. The f... | 11/07/2001 3:14:15PM PST | Burt Lee | Failed Resolution |
| <input type="checkbox"/> | 37 | Basic causes for Computer System lock-ups, hangs or freezes There are many different causes for a computer system to lock-up, hang or freeze. The f... | 07/10/2000 10:32:16AM PDT | | Failed Resolution |
- Buttons:** Email, View, Solve.
- Search/FAQ/Navigation:** Search, FAQ, Frequently Used Solutions, **New Solution**.
- Enter New Solution Form:**

Try running Diskkeeper engine

Buttons: Attempt, Solve.

Solutions - New Solution page

Enter text describing the solution that you are either attempting or have used to resolve the problem. Click either the Attempt or the Solve button to send the solution to the Solutions Considered grid, where it is assigned a status of either *In Consideration* or *Successful Resolution*.

Emailing Solutions

Access the Outbound Email page.

Outbound Email Histo

Refresh 360 360-Degree View Worklist User Preferences

Recipient [Spencer Underwood](#) **Customer Value**

Representing **Outbound Email** Note

Transaction Summary

Created On 09/25/2002 10:22AM PDT

Case ID 220321

Customer Spencer Underwood

Contact

Summary CD Drive making grinding noises

Status Open - New Case

Priority Medium

CD Drive making grinding noises

Compose

From Customer_Support@demo.com [Delivery](#)

To sunderwood@gbi.com [Add/Moc](#)

▼ **Template Search**

Related Transactions

| Select | Type | ID | Summary |
|-------------------------------------|---------------|--------|--|
| <input checked="" type="checkbox"/> | HelpDesk Case | 220321 | CD Drive making grinding noise |

Category Complaint **Type** Em

Product Group Computer2 **Product** Cu

Keywords

Refresh Template List

Template RC: Case Status Report **Selected T**

RC: Case S

Preview Apply Template

Add Closing Send Restart Response

Outbound Email page (1 of 2)

Message Area

Subject Your Case 220321 has been Resolved

Dear Valued Customer -

Your Case 220321 has been resolved. Please review the below Resolution for your case to see that it resolved your problem. If we do not hear from you we will assume that it did.

Details for Case 220321 :

Case Summary: CD Drive making grinding noises

Solution Summary: Go here for answer <http://support.dell.com/home.as>

Solution Details: Go here for answer <http://support.dell.com/home.aspx?~ck=mn>

Dear Spencer Underwood:

I would like to thank you for contacting the call center pertaining to the problem you have reported on 2002-09-25. I am glad that we were able to find a solution satisfactory to you. On behalf of the company, I want to extend our apologies for the inconvenience this has caused you. The following information has been provided for your records. Please reference the complaint number # 220321 for your future correspondence.

Attachments

No Attachment.

Upload an attachment

Outbound Email page (2 of 2)

Use this page to email the text of a solution to the customer or contact for the case, service order, or defect.

Use the From and To fields to indicate who you are sending the email to and from whom it is originating. Expand the Template Search section to select a category, type, product group, product, keywords, and template to use in the email you are sending.

You can also select a template from the Template field to add standard text that was set up at installation. To preview the text, click the Preview button. To add the text to the email, click the Apply Template button.

To add any disclaimer information that was set up when the application was installed, click the Add Closing button.

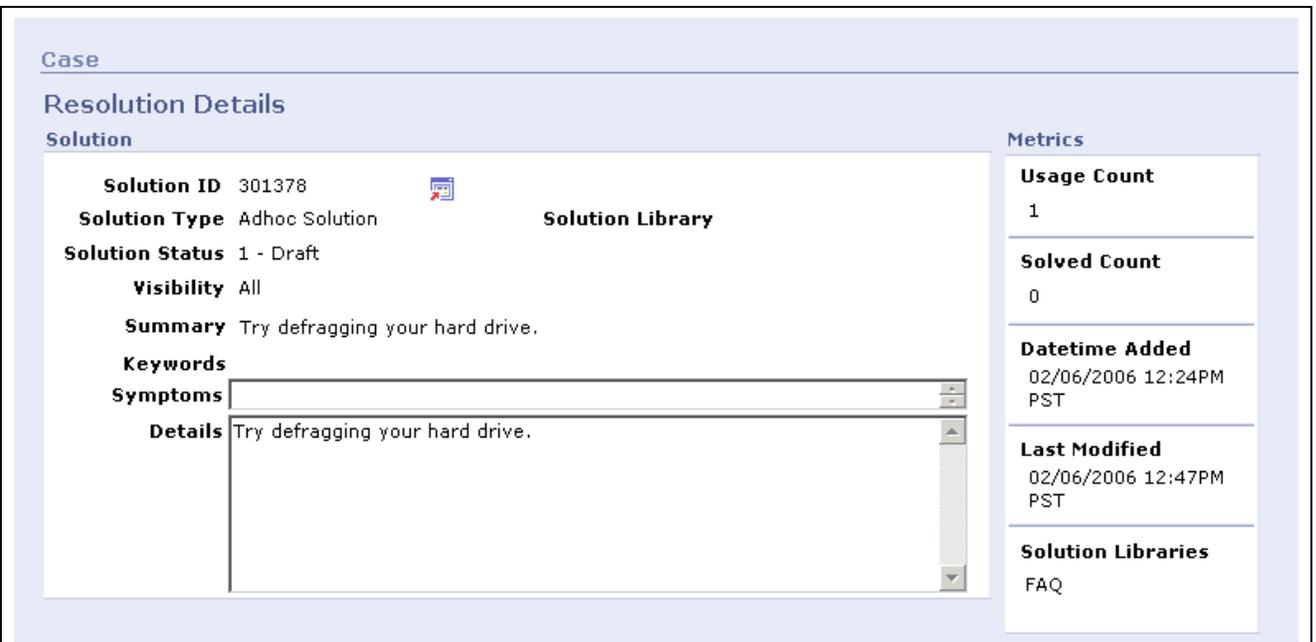
To redraft the email, click the Restart Response button. The Clear Template Search button clears the Category, Type, Product, and Keywords fields.

See Also

PeopleSoft Enterprise CRM 9 Multichannel Applications PeopleBook, “Managing Email,” Replying to Inbound Email

Reviewing Details of Attempted Solutions

Access the Resolutions Details page.



Case

Resolution Details

Solution

Solution ID 301378 

Solution Type Adhoc Solution **Solution Library**

Solution Status 1 - Draft

Visibility All

Summary Try defragging your hard drive.

Keywords

Symptoms

Details Try defragging your hard drive.

Metrics

Usage Count
1

Solved Count
0

Datetime Added
02/06/2006 12:24PM
PST

Last Modified
02/06/2006 12:47PM
PST

Solution Libraries
FAQ

Resolutions Details page (1 of 2)

Solution Notes

[Customize](#) | [Find](#) | [First](#) 1 of 1 [Last](#)

| Summary | Visibility | Added By | Date Added |
|-----------------------------------|------------|----------|--------------------|
| Use of Diskkeeper | Internal | Stu Marx | 02/06/2006 12:39PM |

Solution Attachments

| File Name | File Description | Added By | Date Added |
|--|----------------------------|----------|--------------------|
| epic_install-local.txt | diskeeper install instruct | Stu Marx | 02/06/2006 12:45PM |

Related Solutions

There are no Solutions Related to This Solution

Resolution Notes

[Customize](#) | [Find](#) | [First](#) 1-3 of 3 [Last](#)

| Summary | Visibility | Added By | Date Added |
|---------------------------------------|------------|----------|--------------------|
| Fixing virus worms | Internal | Stu Marx | 02/06/2006 12:42PM |
| See Solution 3451231 | Internal | Stu Marx | 02/06/2006 12:38PM |
| Defragging Hard Drive | Internal | Stu Marx | 02/06/2006 12:26PM |

Add Resolution Note or Attachment

Submit for Review

To submit this solution for review by your solution manager, click the Submit button.

Submit

Solve

[Return to Case](#)

Resolutions Details page (2 of 2)

Use the Resolutions Details page to view the details of a solution, add solution notes and attachments, add resolution notes, and submit adhoc solutions for management approval.

Metrics

| | |
|--|--|
| Usage Count | Indicates the number of times the solution was used to help resolve cases. |
| Solved Count | Indicates the number of times the solution was used to successfully solve cases. |
| Datetime Added and Last Modified | Displays the date when the solution was attempted and last modified. |
| Add Resolution Note or Attachment | Click to add a resolution note that is specific to this solution attempt. |
| Solution Libraries | Lists the solution library that is associated with the solution. |

Solution Notes

To add a new solution note, click the Solution button that is displayed next to the Solution ID field. The Solution page opens in a new window. Click the Notes tab to add a note to the solution.

Solution Attachments

To add a new solution note, click the Solution button that is displayed next to the Solution ID field. The Solution page opens in a new window. Click the Notes tab to add a note to the solution. Click the Add Note button. When you are finished adding your note, click the Add an Attachment link at the bottom of the Add a Note section.

Related Solutions

To add a new solution note, click the Solution button that is displayed next to the Solution ID field. The Solution page opens in a new window. Click the Related Actions tab. Then click the Relate an Existing Solution button to relate a similar solution.

Note. You cannot relate an existing solution to an independent text or adhoc solution.

Resolution Notes

This group box appears with data only if the solution is associated with resolution notes.

| | |
|--|--|
| Summary | Click the note's summary link to display note details on the Resolution Notes page. |
| Add Resolution Note or Attachment | Click this button to a new resolution note or attachment. The system displays the Resolution Notes page. |

Submit for Review

The system displays this section only when the Solution Type is Adhoc Solution and Solution Status is *Draft*. This new section is only used for Support and HelpDesk cases.

| | |
|---------------|---|
| Submit | <p>Click to save the solution. The system also changes the solution status from <i>Draft</i> to <i>Submitted for Review</i> on the Solution page. This indicates the Solution is ready for manager review.</p> <p>PeopleSoft, however, does not deliver a policy to take action or send a notification when the solution status changes. You must configure an AAF policy to send a notification or create a business project to start the solution approval process.</p> <p>See <i>PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook</i>, "Working with Active Analytics Framework".</p> |
|---------------|---|

Viewing External Content Solutions

Access the Solution page. Is this from solution component? I thought when type is link or file, there will be a Path Detail field displayed after Summary, and a View Details link to bring user to that URL or file. The screen shot maybe a summary page of solution? You may want to show the main page with the links to access external content.

Solution

Save Refresh Personalize

Solution ID 301358 **Usage Count** 0
Summary http://www.peoplesoft.com/corp/en/produ... **Solved Count** 0

Solution ID 301358 [Return to Solution](#) **Metrics**

Type Link **Solution Library** Appliances

Status Active **F.A.Q.**

Visibility All

Summary http://www.peoplesoft.com/corp/en/products/ent/crm/index.jsp

Keyword or Phrase Install

Symptoms Installing PeopleSoft CRM Procedures

Details Use link to locate install procedures

Usage Count 0

Solved Count 0

Date Created 05/24/2004 10:52AM PDT

Date Modified 05/25/2004 9:41AM PDT

Solution Libraries Appliances

There are no Notes Related to This Solution
 There are no Attachments Related to This Solution
 There are no Solutions Related to This Solution

Solution page

The system displays this page when a user clicks a solution that uses external content. The solution type for external content solutions is either *Link* or *File*.

Whenever a technician or agent uses external content to resolve a service order or case, the system creates a solution type of *Link* or *File* in the background to represent it.

When external content solutions appear in the search results grid, the description includes a link that opens the external content in a new window. If the external content is a file, it opens in the appropriate application.

Adding Resolution Notes and Attachments

Access the Resolution Notes page.

Case

Resolution Notes

Resolution Notes
Find | View All First ◀ 1 of 1 ▶ Last

*** Summary**

Details

*** Visibility** **Note Type**

Added By Smith,Robert **Added** 09/25/2002 10:22AM PDT

Attachments

| File Name | File Description | Added By | Date Added | |
|---|------------------|--------------|-----------------------|---------------------------------------|
| <input style="width: 100%;" type="text"/> | | Smith,Robert | 05/25/2004 10:12AM | <input type="button" value="Delete"/> |

[Return to Resolution details](#)

* Required Field

Resolution Notes page

Resolution notes created on this page are intermingled with notes on the Notes pages in PeopleSoft Integrated FieldService, PeopleSoft Support, PeopleSoft HelpDesk, and PeopleSoft HelpDesk for Human Resources.

PeopleSoft CRM provides a similar interface for working with notes and attachments across all the components that use this functionality. You can access resolution notes from the Solutions Considered grid, Attempted Solutions grid, and the Notes page.

See Also

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

PART 3

Transaction Billing Processor Integration

Chapter 5

Setting Up an Integration to the Transaction Billing Processor

CHAPTER 5

Setting Up an Integration to the Transaction Billing Processor

This chapter provides an overview of PeopleSoft Customer Relationship Management (PeopleSoft CRM) integration with the Transaction Billing Processor, lists common elements used in this chapter, and discusses how to:

- Set up integrations to the Transaction Billing Processor.
- Work with on-demand billing.
- Set up sales and use tax for third-party tax vendors.

Understanding PeopleSoft CRM Integration with the Transaction Billing Processor

This section discusses:

- Billing and contracts functionality.
- Agreements and entitlements.
- PeopleSoft CRM transactions.
- Cost category definitions.
- Pricing and invoicing.
- Reason codes.
- Tax calculations.
- Workforce synchronization.
- Item definition price types.
- Service order reports.
- Accounting rules.
- Financial profiles of customers.
- Delivered enterprise integration points (EIPs).
- Fields populated in the Transaction Billing Processor.
- Contracts interface tables.
- Transactional billing plans.

See Also

PeopleSoft Enterprise Contracts PeopleBook, "Working with the Transaction Billing Processor"

Billing and Contracts Functionality

PeopleSoft Integrated FieldService, PeopleSoft Order Capture, and PeopleSoft CRM call center applications can integrate with the Transaction Billing Processor or any third-party billing applications to:

- Send agreement, service order, and case fees to the Transaction Billing Processor.
- Send order capture service and product agreement information to the Transaction Billing Processor.
- Generate invoices for services, cases and agreement fees.
- Manage and book revenue to the appropriate general ledger accounts for recurring and one-time purchases of services and products.

Users can take advantage of the feature-rich billing functionality that is available through PeopleSoft Contracts, such as revenue recognition, billing cycle, and schedule details.

This PeopleSoft application also provides the ability to apply the appropriate surcharges and taxation to billable amounts and process the information using user-defined invoice formats.

Note. PeopleSoft CRM FieldService and Call Center do not calculate surcharges and taxes. These transactions are computed in the Transaction Billing Processor.

See Also

PeopleSoft Enterprise Billing PeopleBook, "Structuring Bills"

Agreements and Entitlements

Agreement information resides in PeopleSoft CRM. The system sends it to the Transaction Billing Processor for integration with PeopleSoft Billing and General Ledger. If you integrate PeopleSoft CRM with the Transaction Billing Processor, PeopleSoft CRM sends all agreement-based and on-demand transactions through to the Transaction Billing Processor.

PeopleSoft CRM sends transactions to the Transaction Billing Processor when a user changes the status to *Active*. The timing for billing is decided by PeopleSoft Contracts and Billing based on the options set on the Recurring Bill Schedule page.

In preparation for the integration to the Transaction Billing Processor, PeopleSoft CRM includes statuses and start and end dates on the agreement lines. To control the states that an agreement can move through during the agreement life cycle, PeopleSoft includes change control logic on the agreement status. PeopleSoft CRM uses the same status values that are used in the Transaction Billing Processor. The *Pending Activation* and *Action Required* statuses are, however, unique to PeopleSoft CRM.

Note. The integration to the Transaction Billing Processor only works with PeopleSoft CRM release 8.9 and above and PeopleSoft Financials and Supply Chain Management release 8.81 and above.

Agreement Statuses

Here are the PeopleSoft Integrated FieldService and PeopleSoft Support agreement statuses:

Pending

Use this status when you create an agreement but you have not completed entering information into the agreement. This status enables you to save an agreement without initiating validation checking.

Pending Activation

An agreement is in the *Pending Activation* status when its data entry is complete and manager approval is obtained. Changing the status to the *Pending Activation* status triggers the message that is sent to the Transaction Billing Processor.

From this status, the system attempts to create a contract. If no errors occur, the contract is created in the *Active* status.

The agreement remains in *Pending Activation* status until the associated contract's billing and revenue plans are set to *Ready* status.

When the contract line is ready for billing and revenue, the Transaction Billing Processor sends a message to PeopleSoft CRM and the system moves the agreement from *Pending Activation* to *Active* status automatically so that PeopleSoft CRM can send transactions to the Transaction Billing Processor for processing. When the Contract and the Contract line is created, it is automatically created with a Billing and Revenue plan status of *Ready* and hence the message is sent to CRM without any user intervention.

Action Required

An agreement is in a status of *Action Required* when a failure occurs on the contract activation in the Transaction Billing Processor. If the error occurs in the Transaction Billing Processor, it sends an error message to PeopleSoft CRM indicating that the agreement will remain in a status of *Action Required*. It remains in this status until the status changes to *Pending Activation* after you add the correct information to the agreement.

If the billing or revenue plan could not be set to *Ready* status, the Transaction Billing Processor sends an error message to PeopleSoft CRM indicating what information is missing or incorrect so that the appropriate areas can be corrected and another attempt can be made to put the billing plan or revenue plan in *Ready* status. In this case the system create a new contract.

Once the billing and revenue plan are in *Ready* status, then the system sets the agreement and contract automatically to *Active* status.

If any information on the agreement was missing or incorrect, or if a server was down at the time of transmission, the agreement remains in *Action Required* status.

Active

If no errors exist for the agreement in the *Pending Activation* status, then the agreement is set to *Active* status. This occurs automatically after a contract is created and set to the *Active* status and a billing and revenue plan are created in the *Ready* status. The contract can now accept transactions from the agreement in PeopleSoft CRM.

Closed

A contract can be set to the *Closed* status when the agreement and agreement lines associated with the contract are in *Closed* status and all transactions associated with the agreement have been sent to billing and revenue.

When the Bill Plan or Revenue Plan is attempted to be completed or canceled, the system checks that the agreement and agreement lines associated with the contract are closed and that no service orders or cases are pending. If agreement lines are not closed or pending service orders and cases exist, the system displays an error message.

Note. You cannot initiate the closure of a contract from the CRM side.

The agreement becomes read-only when the status is set to *Closed* for the agreement.

Note. A contract can no longer accept transactions from PeopleSoft CRM once it has been closed. The *Pending Activation* and *Action Required* statuses are available only when you select Contracts Integration on the Installation page for PeopleSoft Integrated FieldService.

See Also

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

PeopleSoft CRM Transactions

These are all the transactions PeopleSoft CRM sends to the Transaction Billing Processor:

- Agreement Fee (including renewal and uplift/discount).
- Order Capture Service Product (including recurring, service product fee, and one time except not on demand).
- On Demand (including case fee, uplift/discount, service order fee, and service order fee uplift discount).
- Agreement Based (including case fee, uplift/discount, service order fee, and service order uplift/discount).
- Service Order (including labor fee, labor fee uplift/discount, material fee, material fee uplift/discount, expenses, expenses uplift/discount).

Note. The transactions with uplifts and discounts are sent to the customer on the same invoice as the fee. They appear as separate bill lines; therefore, they are considered separate transactions.

Cost Category Definitions

To retrieve the correct rate for a worker’s time, you must define cost category types using the Cost Category Definition page within the Service Level component. Cost category types are set based on the service level, which defines the service provider’s hours of operation.

The Service level setup page is used to configure a customer’s hours of operation. For example, a service provider might define their hours of operation to be:

- Straight hours.
Monday through Friday 8:00 a.m. to 5 p.m.
- Overtime hours.
Monday through Thursday 5:00 p.m. to 8:00 a.m.
- Weekends.
Friday 5:00 p.m. to Monday 8:00 a.m.

Once you tie cost categories to the days and hours of operation, then the system can apply the correct rate to the provider group or provider group member. The Cost Category Definition page enables you to define the cost category for the service level hours of operation defined on the service level page. You can override begin and end times, select different cost categories, and enter multiple values for a given day.

In addition, you must define cost categories for workers to account for the cost of labor time to your company. You set up these cost categories using the Provider Group and Provider Group Member definition pages in the Workforce component.

When technicians enter their hours in the time log based on that day and time, the system retrieves the correct rate from the member cost categories.

See Also

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

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Setting Up and Maintaining Provider Groups and Group Members,” Establishing Cost Categories for Workers

Pricing and Invoicing

To price cases for a call center agent’s time or to implement pricing based on a flat fee per case, which is based on the price defined on the agreement, PeopleSoft CRM uses pricing logic that automatically calculates the number of hours upon saving a case.

You can also price and invoice prepaid services by time or the number of service orders or cases initiated through PeopleSoft Integrated FieldService and Support.

Additionally, the PeopleSoft system has incorporated pricing features within the Service Order component to enable pricing for the billable elements of a service (material, time, and expense fees) and to synchronize the service price of the materials from PeopleSoft Supply Chain Management (PeopleSoft SCM) with the information that resides on the service order.

You can also apply a service fee to cases and services orders.

The system retrieves the correct price from the Item Definition page in PeopleSoft CRM when the technician records material used at the customer site on the service order. The sum of the material used is calculated and summed up with the total cost of labor, expense charges, and service fees.

The system displays the material price, labor, expense, service charges, and total values separately. However, when sending information to PeopleSoft Contracts for billing, the system sends the individual transaction values so that they can be displayed separately on the invoice.

The service manager or contracts administrator can increase or decrease the sum of labor, material, and expense charges and recalculate fees to generate new service order totals. Surcharges and taxation are not, however, included in this total. These fees are calculated by billing and included on the invoice to the customer. You don’t, however, need an agreement to bill a flat fee for a case.

The integration begins with the Transaction Billing Processor when a user sets the status to *Pending Activation* for an agreement or service. The system creates a corresponding contract and contract line in PeopleSoft Contracts through the Transaction Billing Processor. Transactions such as service orders, service agreements, and case details are sent from PeopleSoft CRM to the Transaction Billing Processor and stored in the Contracts Interface tables. The Transaction Billing Processor uses PeopleSoft Contracts rate-based functionality and bills charges on an as-incurred basis. The transaction information is then forwarded to PeopleSoft Billing as bill lines for invoice generation. The Transaction Billing Processor manages the appropriate timing of sending these transactions to PeopleSoft Billing.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Defining Pricing Information for Services and Support Offerings”

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

Reason Codes

PeopleSoft CRM uses reason codes on the Agreement and Billing pages for service orders and cases to provide an informational reason as to why an adjustment was made to the fees.

The prompt values for the Reason field are from the Reason Code table (RB_REASON_CD). To facilitate the integration with the Transaction Billing Processor, the PeopleSoft application uses reason codes to further describe billing adjustments. When you set up reason codes, you also need to specify the correct reason type to make the reasons available within the transactions.

For service order billing, you can specify reason codes for adjustments of service fees, material, time, expenses, and additional adjustments for the total cost of the service order. For agreement billing, you can specify reason codes for adjustments of service fees, product fees, service and product fees, and additional adjustments to the agreement fee total. For cases, you can specify reason codes for case fees and time-based fees.

All reason code types enable the end user to choose predefined reason codes from the Reason Code table (PS_RB_REASON_CD). If the reason codes in the database are not adequate for the user to make a billing adjustment, end users can click the Other link and enter their own reason in the Detail field.

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “Setting Up Call Center Prompt Tables,” Setting Up Reason Codes

Tax Calculations

For PeopleSoft CRM transactions that require value-added tax (VAT), the system sends the ship from location along with the address associated with the customer or the location where the product was shipped to the Transaction Billing Processor.

If VAT is set up for the services or products, the system determines whether VAT is required and performs the tax calculations to include on the invoice.

The system applies taxes during billing invoice finalization for VAT) and sales and use taxes (SUT). Rarely are both applied at the same time; however, the PeopleSoft application provides the flexibility to handle both taxes for those countries where both taxes apply.

Note. PeopleSoft Order Capture uses third-party tax calculation routines for Sales and Use tax as well as VAT tax calculations and does not use Simple Tax. Also, any taxes calculated by PeopleSoft Order Capture are recalculated in PeopleSoft Billing.

See *PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook*, “Setting Up PeopleSoft Order Capture,” Defining Tax Installation Options.

A service provider can use two methods of determining sales and use taxes that can be applied to a case, service order, and agreement fee transactions:

- Simple Tax (PeopleSoft tax)

If the customer is tax exempt, users can link to the Tax Parameters page from the Billing page on the service order, case, or agreement and then select the Tax Exempt check box. Customers should inform the service provider if they are exempt from taxes and provide their tax certificate number. If a user selects the Tax Exempt check box, they must also enter the tax certificate number.

Since the exemption certificates are synced, the exemption certificate is prompted from the customer exemption table. However, it does not have to exist in the customer exemption table. PeopleSoft CRM does not perform a validation. If a user creates new addresses for a company, consumer, or site, the user can select a tax code from the prompt. When the company, consumer, or site is selected for an agreement fee, service order fee, or case fee transaction, the newly created address and tax code are sent to the Transaction Billing Processor with the transaction.

- Third-Party Tax (Vertex or Taxware).

See [Chapter 5, “Setting Up an Integration to the Transaction Billing Processor,” Setting Up Sales and Use Tax for Third-Party Tax Vendors, page 97.](#)

When the Transaction Billing Processor sends the transaction to PeopleSoft Billing for invoicing, final taxes are calculated at the time of invoice finalization using either of these methods. For PeopleSoft Billing to calculate the taxes for service order transaction (including service fees, labor, materials, and expenses) or case transactions (case fee or labor fee), specific tax fields must be populated and sent along with the transaction.

The fields that need to be populated are dependent on the tax methodology used, either PeopleSoft Tax or Third-Party Tax. PeopleSoft Billing handles the information for PeopleSoft CRM services.

For transactions that are sent from PeopleSoft Integrated FieldService or PeopleSoft Support, most of the values are provided by default from within PeopleSoft CRM transactions and passed on to the Transaction Billing Processor.

Note. PeopleSoft Billing derives some tax calculation information from the contract line in PeopleSoft Contracts. Also, you can override most fields on the billing plan. PeopleSoft CRM also uses order acceptance location, order origin location, and storage location for third-party tax calculations.

If billable transactions for PeopleSoft Integrated FieldService and PeopleSoft Support require VAT, use the links on these PeopleSoft CRM setup pages to access the VAT Treatment page in PeopleSoft SCM:

- Service Types
- Cost Category
- Case Type
- Item
- Item Group

To add SUT information, access the Tax Parameters page in PeopleSoft CRM from the billing pages within the agreement, service order, or case. You can also access the Tax Parameters Definitions page in PeopleSoft CRM by selecting Set Up CRM, Common Definitions, Tax Parameter Definitions.

See Also

PeopleSoft Working with Customers and Orders PeopleBook, “Maintaining General Customer Information,” Setting Up Tax-Exempt Certificate Information

PeopleSoft Working with Customers and Orders PeopleBook, “Maintaining General Customer Information,” Adding General Customer Information, Entering Customer VAT Information

PeopleSoft Financials, Enterprise Service Automation and Supply Chain Management Application Fundamentals PeopleBook, “Defining Financials and Supply Chain Management Common Definitions,” Defining PeopleSoft Sales and Use Tax Authorities and Codes

PeopleSoft Global Options and Reports PeopleBook, “Working with Value Added Taxes (VAT)”

Workforce Synchronization

To apply revenue to the correct general ledger accounts for the time an agent or field service technician spends on a case or service order, the Workforce EIP (WORKFORCE_SYNC) and the Business Unit HR Sync EIP (BUS_UNIT_HR_SYNC) from PeopleSoft Human Resources Management retrieves the human resources business unit and the general ledger business unit for every worker.

The system stores the general ledger business unit information within the person data structure. The Business Unit HR Sync EIP (BUS_UNIT_HR_SYNC) from PeopleSoft HCM maps the human resource business unit information to the general ledger business unit.

This links the general ledger business unit to the call center agent or field service technician. To accomplish this, PeopleSoft created two fields in the Worker component for the general ledger business unit.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Workforce Management”

Item Definition Price Types

The Item Definition page contains two pricing fields: Service Price and Service Exchange Amount. The service price is what the field technician charges the customer for using an item, regardless of whether it is an install or repair. The service exchange amount is what the customer is credited when a part is removed. This charge is deducted from the service price.

For example, a company has a service price of 10.00 USD for a new PC chip. The service exchange amount is set to 4.00 USD. When the field technician removes the part (item) from the installed product and replaces it with a new item, then the new chip costs 6.00 USD. In this case, the service exchange amount (4.00 USD) is subtracted from the service price (10.00 USD).

These fields map to the PeopleSoft Supply Chain Management pricing fields (created specifically for pricing items in PeopleSoft Integrated FieldService). When the item price is synchronized with the item master, the system checks the appropriate fields for item definitions. The price and currency code are exposed on the Item Definition page when an integration with PeopleSoft SCM exists but they are not available for update. Therefore, the currency and price cannot be modified on the Item Definition page.

However, if the items are not synchronized with PeopleSoft SCM, the administrator may enter price information on the Item Definition page. To stay in sync with the Item Definition page in PeopleSoft SCM, the same fields and labels are used in PeopleSoft CRM.

The system displays these fields on the Item Definition page in PeopleSoft CRM:

- Currency Code

This field prompts on the Currency Code table (CURRENCY_CODE_TABLE). The administrator can select the currency code for each item because items can have different currency codes. This field is not required.

- Service Price

Enter an amount for the item. This field is not required.

- Service Exchange Amount

Enter an amount for the item if it is being exchanged for a newer or working item. This field is not required.

Note. These prices are only used within the service order when calculating the pricing for materials.

See Also

PeopleSoft Enterprise Managing Items PeopleBook, “Defining Items”

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook, “Defining Items”

Service Order Reports

PeopleSoft Integrated FieldService provides two reports that are used to detail the services that have to be performed for a service order and provide expense details to customers.

Here are descriptions of the reports:

- Service Order Estimate Report.

Once a technician enters time, material, and expense information in a service order, the contract administrator, service manager, or technician may generate a report to provide to the customer for services performed. This report is an estimate of the amount that is planned for the job. It includes all activities with the planned start and stop dates and times, the status of each activity, the charge for performing the service, and any materials that are going to be used. There is a comments section that the technician can use to report actual material and labor if it is different than what was specified on the report. This report does not include taxes and surcharges and it is not a bill. To launch the report from the Service Order page, the user clicks the Estimate Report button on the toolbar.

- Service Order Detail Report.

This report is used by technicians to list all of the work needed to fulfill the requirements of the service order. To launch the report from the Service Order or My Service Order page, the user clicks the Detail Report button on the toolbar.

See Also

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

Accounting Rules

To define the various attributes of an agreement, service order, or case that should be sent to specific revenue accounts, set up accounting rules in the Transaction Billing Processor during implementation.

The integration to the Transaction Billing Processor enables users to manage and book their revenue by posting revenue accounting entries to their general ledger for agreement fees and services rendered, which are entered on service orders and cases.

For accounting purposes, these fields must be populated in the Contracts Interface table by PeopleSoft CRM:

| | |
|---|--|
| Transaction Source | Indicates the origin of the transaction. For example, if the value is <i>CRM</i> , it tells the system that the transaction is from PeopleSoft CRM. |
| From GL Unit (from general ledger unit) | The source general ledger business unit (GLBU). Enter the source PeopleSoft General Ledger business unit. With the exception of employee-related transactions (service orders), this value should always be the same as the value in the GL Business Unit field. |
| GLBU (general ledger business unit) | The PeopleSoft General Ledger business unit defines where the accounting entry is booked. The system populates this field from various sources based on the type of transactions: <i>Agreement Fee Transactions</i> , <i>Service Order Transactions</i> , or <i>Support Case Transactions</i> . |
| Transaction Type and Transaction Subtype | These fields, which reside in the Transaction Billing Processor, are system-defined codes that identify whether the transaction is an agreement, service order, or support case. This field is critical for Transaction Billing Processor to know the type of accounting. Accounting rules setup is different depending on this field. |
| Accounting Date | This field is populated with the transaction date if no date is sent from PeopleSoft CRM. |
| Department | This field is optional. Use a wild card with this value in the accounting rules to use the department sent from PeopleSoft CRM in the revenue accounting entry. |

See Also

PeopleSoft Enterprise Contracts PeopleBook, "Setting Up the Transaction Billing Processor"

PeopleSoft Enterprise Contracts PeopleBook, "Working with PeopleSoft Project Costing," Setting Up Rules and Exceptions for Organizational Sharing

PeopleSoft Enterprise Project Costing PeopleBook, "Setting Up Accounting for Projects," Defining Accounting Rules

Financial Profiles of Customers

The 360-degree view integration to PeopleSoft Accounts Receivable provides the ability to display financial profiles of the customer for agreement-based service fees and service order and case transactions.

Customer profile information that is applicable to the services integration to the Transaction Billing Processor includes: statement number, statement date, statement currency, statement total, bill to customer, outstanding balance, and past due balance.

For invoice data, PeopleSoft CRM sends a request application message to PeopleSoft Billing. PeopleSoft Billing sends a response application message to PeopleSoft CRM with the information that appears under the 360-Degree View tree. In addition, once invoices and payments appear on the 360-Degree View tree for a customer, you can click an invoice or payment to access PeopleSoft Billing, where you can view more details on the invoice.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Setting Up the 360-Degree View," Setting Up the 360-Degree View Tree

Delivered EIPs

This table lists the EIPs that PeopleSoft CRM delivers to facilitate the integration of PeopleSoft CRM applications to PeopleSoft Financial Management Services (PeopleSoft FMS), PeopleSoft Enterprise Service Automation (PeopleSoft ESA), PeopleSoft Supply Chain Management (PeopleSoft SCM), and PeopleSoft Human Capital Management (PeopleSoft HCM).

Note. The database code for PeopleSoft Financials and Supply Chain Management is FSCM.

| Queue Name | Description | Message and Service Operation Name | Directions of Integration | Technology |
|---------------|---|--|--|---------------------|
| FO_SYNC | Sends tax code definitions from PeopleSoft FSCM to CRM. | TAX_HEADER_TBL_FULLSYNC | FSCM → CRM | Application Message |
| HR_SETUP | Maps PeopleSoft HCM business units to general ledger business units. | BUS_UNIT_HR_SYNC BUS_UNIT_HR_FULLSYNC | HCM → CRM | Application Message |
| CONTRACT | Synchronizes request and response messages from PeopleSoft CRM and Contracts for pending activities about agreements, transactions, invoicing, and contracts. | CONTRACT_REQUEST CONTRACT_RESPONSE CONTRACT_TXN PENDING_ACTIVITY | CRM → ESA CRM ← ESA CRM → ESA CRM ↔ ESA | Application Message |
| SERVICE | Synchronizes messages from PeopleSoft CRM to Contracts for accounting definitions, VAT, and VAT drivers. | SERVICE_SYNC SERVICE_FULLSYNC SERVICE_TYPE_SYNC SERVICE_TYPE_FULLSYNC | CRM → ESA | Application Message |
| COST_CATEGORY | Synchronizes cost categories (called labor type in PeopleSoft FSCM) from PeopleSoft CRM to Contracts for accounting definitions and VAT drivers. | COST_CATEGORY_SYNC COST_CATEGORY_FULLSYNC | CRM → ESA | Application Message |

| Queue Name | Description | Message and Service Operation Name | Directions of Integration | Technology |
|------------------|--|--|---------------------------|---------------------|
| CASE | Synchronizes case types and accounting definition information from PeopleSoft CRM to Contracts. | CASE_TYPE_SYNC CASE_TYPE_FULLSYNC SOURCE_SYNC SOURCE_FULLSYNC | CRM → ESA | Application Message |
| ENTERPRISE_SETUP | Synchronizes schedule information from PeopleSoft Financials to CRM for agreement information and revenue recognition. | SCHEDULE_SYNC SCHEDULE_FULLSYNC | FMS → CRM | Application Message |
| BI_SETUP | Synchronizes bill types and bill sources from PeopleSoft SCM to CRM for contract transactions. | BILL_TYPE_SYNC BILL_TYPE_FULLSYNC BILL_SOURCE_SYNC BILL_SOURCE_FULLSYNC | SCM → CRM | Application Message |
| VAT_TRANSFER | Generates request and response messages from PeopleSoft CRM to global VAT to generate VAT defaults. | VAT_TRANSFER_REQ VAT_TRANSFER_RSP | SCM ↔ CRM | Application Message |
| PAY_TERMS | Synchronizes messages from PeopleSoft FSCM to CRM for payment terms. | PAY_TERMS_SYNC PAY_TERMS_FULLSYNC | SCM → CRM | Application Message |
| AGREEMENT | Generic message that synchronizes agreement information with third-party vendors. | AGREEMENT_SYNC | FieldService → External | Application Message |
| SERVICE_ORDER | Generic message that synchronizes service order billing information with third-party vendors. | SERVICE_ORDER_BILLING_SYNC | FieldService → External | Application Message |

Fields Populated in the Transaction Billing Processor

This section discusses:

- Contract header
- Contract line
- Billing plan
- Revenue plan
- Tax parameters

Note. PeopleSoft CRM sends fields to the Transaction Billing Processor to create the contract, contract line, and revenue and billing plans. Many of these fields can be changed manually on the contract. If you want to change a field after contract activation has taken place, you must create an amendment using the Transaction Billing Processor amendment functionality.

Contract Header

These fields must be populated in the contract header. These values are sent from the PeopleSoft CRM agreement. These fields can be overridden on the contract header once they are populated from the CRM agreement:

- Bill To Contact
- Bill To Customer
- Bill To Address
- Purchase Order ID

Note. This field is not required and it is populated from the Billing Plan at a Contract Line.

- Payment Terms
- Sold To Customer

These fields cannot be overridden on the contract header:

- Sold To Customer
- CA Business Unit
- Currency Code

This table lists additional fields that are required on the contract header and the source from which the system retrieves the value for the field:

| PeopleSoft Contracts Field Name | Source |
|---|---|
| Bill Type Note. This field is sent from PeopleSoft CRM. | PeopleSoft Contracts Business Unit. |
| Legal Entity | PeopleSoft Contracts Business Unit. |
| Contract Signed Date | The system populates this field with the current date. PeopleSoft CRM must send this date to override the default contract signed date. |

| PeopleSoft Contracts Field Name | Source |
|---------------------------------|-------------------------------------|
| Contract Type | PeopleSoft Contracts Business Unit. |
| Exchange Rate Type | PeopleSoft Contracts Business Unit. |

Contract Line

These fields that must be populated in the contract line. These values are sent from the PeopleSoft CRM agreement or on-demand service order/case. The list contains fields that can be overridden on the contract line once they are populated from the CRM agreement.

These fields can be overridden on the contract line:

- Line Description
- Ship From Location (source = PeopleSoft Contracts business unit)
- Start Date
- End Date

Note. Except for Line Description, these fields are not sent from PeopleSoft CRM.

The Currency Code field cannot be overridden on the contract line. The source for the currency code is the contract header.

Billing Plan

These fields that must be populated in the billing plan. These values are sent from the PeopleSoft CRM agreement or on-demand service order/case. The list contains fields that can be overridden on the billing plan once they are populated from the CRM agreement.

These fields can be overridden on the contract line:

- Bill To Contact
- Bill To Customer
- Bill To Address

These fields appear on the Billing Plan General page. The system populates the fields on this page upon contract creation. This table shows the source from which each field is populated, if the value can be changed in the billing plan in the Transaction Billing Processor, and if the field can be overridden by transactions sent from PeopleSoft CRM:

| Billing Plan Field | PeopleSoft Contracts Source | Changeable? | Can Be Overwritten by CRM on Transaction? |
|---|-----------------------------|-------------|---|
| Billing Notes Note. You can create a note in the Transaction Billing Processor and attach that note to a billing plan. It can be sent to PeopleSoft Billing as part of the generated invoice. | Manual process | Yes | Yes |
| Contract Number | Contract header | No | No |
| Billing Plan Number | Billing plan | No | No |
| Billing Method | Contract line | No | No |
| Currency Code | Contract header | No | No |
| Bill Plan Description | Contract header | Yes | No |

Other fields on the Billing Plan General page, such as the Billing Inquiry, Billing Specialist, Billing Authority, Cycle ID, Bill By ID, and Invoice Form can be added to the billing plan manually or left blank.

Revenue Plan

A contract line is linked to a revenue plan to recognize revenue. The required revenue plan fields populate automatically during contract creation and cannot be overwritten from the transaction data that is sent from PeopleSoft CRM. The revenue plan fields are managed entirely from the contract.

These fields are required for the Revenue Plan page. The table shows the source from which each field is populated. These fields cannot be overridden by transactions sent from PeopleSoft CRM:

| Revenue Plan Field | PeopleSoft Contracts Source |
|--------------------------|-----------------------------|
| Contract Number | Contract header |
| Sold To Customer | Contract header |
| Business Unit | Contract header |
| Revenue Method | Contract Line |
| Currency Code | Contract header |
| Revenue Plan Description | Contract header |
| Hold (flag) | Revenue Plan |
| Events | Contract header |

Note. If a credit hold exists on a customer in PeopleSoft CRM, you must put the revenue plan for the contract on hold by selecting the Hold check box on the Revenue Plan page to prevent transactions from processing. If you select the Hold check box, then you must release the hold manually when you are ready to recognize revenue for the customer.

While every created contract line has a revenue plan, recurring fees do not use the revenue plan for revenue recognition. Revenue plans build a deferred revenue schedule associated with the billing transactions. In addition, on-demand transactions do not need a revenue plan to recognize revenue. PeopleSoft Billing manages revenue for on-demand transactions. PeopleSoft Billing also manages the revenue method for all on-demand and recurring transactions.

To ensure that your customers are billed properly, you should also validate the billing plan and revenue plan details in PeopleSoft Contracts.

Tax Parameters

PeopleSoft CRM sends tax parameter information for agreements to the Transaction Billing Processor. The Transaction Billing Processor stores the CRM tax information in the Contract Interface tables (INTFC_CA) and passes this information on to PeopleSoft Billing for processing. The Billing Plan General - Tax Parameters tab is not available for CRM contracts.

These tax fields are passed from PeopleSoft CRM to the contract interface tables:

- Ship From Location
- Tax Code
- Tax Group
- Transaction Type
- Transaction Sub Type
- Exemption Certificate
- Physical Nature
- Order acceptance location.
- Order origin location.
- Storage location.

PeopleSoft CRM sends fields to the Transaction Billing Processor to create the contract, contract line, and revenue and billing plans. Many of these fields can be changed manually on the contract. In addition, the Transaction Billing Processor receives sales and use and VAT tax parameters if they are sent by PeopleSoft CRM.

Transaction Billing Processor interface tables (INTFC_CA, INTFC_CA2, INTFC_CA_HDR, and INTFC_CA_NOTE) are duplicates of the Billing interface tables. However, the first two keys on the billing table, INTFC_ID and INFC_LINE_NUM, have been changed to the single key CA_TXN_ID on the Transaction Billing Processor tables.

See Also

PeopleSoft Enterprise Contracts PeopleBook, Processing PeopleSoft Contracts Billing

PeopleSoft Enterprise Billing PeopleBook, Entering Bills Online

Contracts Interface Tables

The Contracts interface tables store the transactions from PeopleSoft CRM. The first two keys on the billing table, INTFC_ID and INFC_LINE_NUM, have been changed to the single key CA_TXN_ID on the Transaction Billing Processor tables.

PeopleSoft Integrated FieldService and Support

PeopleSoft CRM sends service order transaction information, case transaction information, and service agreement fees to be billed or accounted for to the Transaction Billing Processor interface tables.

PeopleSoft Order Capture

PeopleSoft Order Capture sends these fields to the Transaction Billing Processor for every transaction:

- Sold to Customer.
- Sold To Contact.
- Sold To Address.
- Contract Business Unit.

The Transaction Billing Processor sends these fields to PeopleSoft Order Capture as a response:

- Contract Number
- Contract Line Number
- PeopleSoft Contracts Business Unit
- Error Status
- Error Message

Transactional Billing Plans

The system creates a billing plan with an *As-incurred* billing method for the service transactions sent from PeopleSoft CRM to PeopleSoft Contracts. Pricing occurs in PeopleSoft CRM for all services on the agreement, such as service order transactions, service agreement fees, and cases. Contract lines within an agreement-related contract are linked to the billing plan. Although these billing plans contain rules defined by default upon contract creation, you can manually override the system defaults.

This table presents source and override information for the fields on the billing plan:

| Field | CA Source | Override on Billing Plan? | Override from CRM Transaction? |
|-----------------------|-----------------|---------------------------|--------------------------------|
| Billing Notes | Manual Process | Yes | Yes |
| Contract # | Contract Header | No | No |
| Billing Plan # | Billing Plan | No | No |
| Billing Method | Contract Line | No | No |
| Currency Code | Contract Header | No | No |
| Bill Plan Description | Contract Header | Yes | No |

You can link only CRM lines to a billing plan created from CRM transactions. You cannot mix lines with different transaction sources on the billing plan. For example, you cannot link a CRM contract line with a Project Costing contract line.

PeopleSoft Integrated FieldService, PeopleSoft Support, and PeopleSoft Order Capture send credit card information to the Transaction Billing Processor. The Transaction Billing Processor does not validate the credit card numbers.

Common Elements Used in This Chapter

| | |
|----------------------------------|--|
| Agreement | A PeopleSoft CRM agreement is a list of obligations to which a service provider has agreed or committed to the customer. The agreement lines listed on the agreement include services and products covered by the agreement, information about who or what customer locations can request service, and the level of service that is provided, which includes restore time, response time, prime period of maintenance, and service coverage (time, material, and expense). |
| Agreement Pricing | Agreement pricing records define the fee paid for a specific service or support offering. The agreement price is defined when the agreement is issued to the customer. PeopleSoft CRM also allows you to initiate recurring charges for which a customer might pay a monthly or quarterly fee. |
| Agreement Service Pricing | Agreement service pricing records define what the customer pays when the work associated with the service or support offering on the agreement is performed. This record includes the price paid per transaction covered by the agreement line. |
| Billing Plan | When the system creates a contract, it also generates a billing plan that is linked to a contract line. The billing plan determines how a transaction should be billed. It contains customer billing information, billing method (for example, as-incurred), and status of the billing plan. |
| Contract Amendment | A contract amendment is any change made to an active contract for which you are altering the fundamental obligations and entitlements of the contract. |
| Deferred Revenue | Deferred revenue helps to create and send invoices for products or services that are to be delivered in the future or over a range of time. You may use deferred revenue to generate accounting entries that defer revenue recognition based on a revenue recognition date and proration method that you select. |
| General Ledger | General ledger is where all of the journal entries are posted. Journal Generator populates the general ledger with accounting entries (for example, accounts receivable and revenue entries). |
| Location | Select the location of the store where the order is to be purchased. This field is used for tax vendor exceptions and reporting. |
| Order Acceptance Location | Select the location where the order is to be accepted. The system uses this field to determine tax jurisdiction. |
| Order Origin Location | Select the location where the order originated. The system uses this field to determine tax jurisdiction. |

| | |
|---------------------------------|---|
| Rate Based Contract Line | A rate based contract line is a transaction-based offering (or an ad hoc offering) that the Transaction Billing Processor picks up and sends to PeopleSoft Billing. |
| Revenue Plan | When the system creates a contract, a revenue plan is also created and associated with a contract line. You can create revenue plans either automatically or manually. The contract line, however, must be linked to the revenue recognition plan to recognize revenue. |
| Revenue Recognition | Revenue recognition occurs when the system sends revenue information to the general ledger and it is counted in the revenue projection for the accounting period. |
| Store Location | Enter the address of the store location. |

Note. If you are using a third-party tax vendor, the entry in this field should match the store location code in Vertex or Taxware.

Setting Up Integrations to the Transaction Billing Processor

To define agreement options, time types, and tax parameters, use the Agreement Options (RF_AGR_OPTIONS), Time Type (RF_TIME_TYPE), and Tax Parameters (RF_TAX_PARAM) components.

This section discusses how to:

- Establish billing and pricing options.
- Map agreement setIDs with contracts and general ledger business units.
- Set up time types for PeopleSoft Integrated FieldService.
- Set up billing options for PeopleSoft Integrated FieldService.
- Set up billing options for PeopleSoft Call Center.
- Set up billing options for PeopleSoft Order Capture.
- Define tax parameters.

Note. You must activate the messages, queue statuses, service operations, and routings (from the EIP chart discussed previously) to use the integration to the Transaction Billing Processor.

See Also

Chapter 5, “Setting Up an Integration to the Transaction Billing Processor,” Delivered EIPs, page 73

Pages Used to Set Up Integrations to the Transaction Billing Processor

| Page Name | Object Name | Navigation | Usage |
|-------------------------------------|--------------------|---|--|
| Billing and Pricing Options | RB_INTEGRATION | Set Up CRM, Install, Installation Options, Billing and Pricing Options | Turn on integration to the Transaction Billing Processor for PeopleSoft Integrated FieldService, Call Center, and Order Capture. Enable pricing for service order and cases. |
| Agreement Options | RF_AGR_OPTIONS | Set Up CRM, Common Definitions, Agreement Options, Agreement Options | Map the agreement setIDs with the business units for both the Transaction Billing Processor and PeopleSoft General Ledger. |
| Time Types | RF_TIME_TYPE | Set Up CRM, Product Related, FieldService, Time Type, Time Types | Establish the defaults for the types of time that are billable for the business units being set up under the selected setID. |
| Billing Options | RF_BU_BILL_OPTIONS | Set Up CRM, Business Unit Related, FieldService Definition, Billing Options | Set up billing options for PeopleSoft Integrated FieldService. |
| Business Unit Billing Details | BUS_UNIT_RC_BI_SEC | Set Up CRM, Business Unit Related, Call Center Definition, Options Select Bill for Cases and then click the Details link. (Note that you must have Billing enabled or this link will not appear.) | Set up billing options for PeopleSoft call center applications. |
| Order Capture Definition - Internal | BUS_UNIT_RO1 | Set Up CRM, Business Unit Related, Order Capture Definition, Internal | Set up billing options for PeopleSoft Order Capture. |
| Tax Parameter Definitions | RF_TAX_PARAM | Set Up CRM, Common Definitions, Tax Parameter Definition, Tax Parameter Definition | Set up sales and use taxes for service, material, labor, expenses, and cases for third-party tax vendors. |

Establishing Billing and Pricing Options

Access the Billing and Pricing Options page.

The screenshot shows the 'Billing and Pricing Options' page. It features a navigation bar with four tabs: 'Alt Character', 'Anonymous Object', 'HRHD EIP Options', and 'Billing and Pricing Options'. The main content area is organized into three sections:

- FieldService Options:** Contains two checked checkboxes: 'Send Billing Transactions to Contracts' and 'Calculate Price on Service Orders'.
- Call Center Options:** Contains two checked checkboxes: 'Send Billing Transactions to Contracts' and 'Calculate Price on Case'.
- Order Capture Options:** Contains one checked checkbox: 'Send Billing Transactions to Contracts'.

At the bottom left of the page, there is a 'Save' button.

Billing and Pricing Options page

Note. No installation options exist for third-party integration since no method of determining what validation checking is required on the system to receive agreement, service order, or case data exists.

Send Billing Transactions to Contracts

Select this check box to send agreement fee billing date, service order billing data, case fees, and order information to the Transaction Billing Processor for billing and accounting.

The system sends agreement fees, case fees, or service order fees to the Transaction Billing Processor when the case or service order is closed. For PeopleSoft Order Capture, the system sends the information to the Transaction Billing Processor when you submit the order. These options are not available without customizing the application.

Calculate Price on Service Orders

Select this check box if you want the system to price on-demand and agreement-based service orders.

Calculate Price on Case

Select this check box if you want the system to price agreement- and on-demand cases.

Mapping Agreement SetIDs with Contracts and General Ledger Business Units

Access the Agreement Options page.

| *SetID | Contracts Business Unit | GL Business Unit | Location Code | Location Description | Schedule |
|--------|-------------------------|------------------|---------------|----------------------------|----------|
| CRM01 | US003 | US003 | US120 | CRM APPLIANCE MAIN OFFICE | MONTHLY |
| CRM02 | US001 | US001 | US130 | CRM Hardware/Software Main | MONTHLY |
| CRM03 | US002 | US001 | KUNY00 | Corporation Headquarters | ANNUAL |

Agreement Options page

Agreement Options Tab

Use the fields within this tab to map the agreement setIDs to the business units for both the Transaction Billing Processor and PeopleSoft General Ledger.

This mapping links the agreement to the corresponding contract. The system uses the existing business unit EIP to obtain all contracts and general ledger business units from the PeopleSoft FSCM database.

| | |
|--|---|
| SetID | Enter the setID that you want to use with the agreements that you create for integration to the Transaction Billing Processor. |
| Contracts Business Unit | Enter the business unit that you want to use to create contracts in the Transaction Billing Processor. The Transaction Billing Processor business unit must be tied to the agreement to facilitate the proper creation of a contract and to enable the appropriate default values to be selected when the contract is created. |
| GL Business Unit (general ledger business unit) | Enter the general ledger business unit that you want associated with the setID. The GL Business Unit field is required for contracts integration with PeopleSoft Global to send revenue to the appropriate general ledger account. |
| Location Code | The location code prompts from the Location table (LOCATION_TBL) in PeopleSoft CRM and returns a location code. The system sends the country and state information to the Transaction Billing Processor with the agreement transaction. This information is needed to calculate VAT tax rates. The location table in PeopleSoft CRM is synced with the location table in the PeopleSoft FSCM database (two-way). |
| Schedule | Select the schedule by which you want to report revenue recognition. |

Note. When the system creates the agreement, it uses the setID, the contracts business unit, and the general ledger business unit from the Agreement Options page.

Billing Options Tab

Use the fields within this tab to map the agreement setID to the bill type and the bill source.

For example, if the CRM01 setID identifies the bill type and bill source as a SERVICE, then the system sends the information to the Transaction Billing Processor to override the Bill Source and Bill Type fields on the Transaction Billing Processor billing plan.

| | |
|------------------|---|
| Bill Type | Select the bill type that you want associated with the setID. |
|------------------|---|

The bill type prompts on all bill type identifier codes that are synced from PeopleSoft Billing to PeopleSoft CRM. The bill type code is a user-defined value in PeopleSoft Billing.

Bill Source

Select the bill source that you want associated with the setID.

The bill source prompts on all bill source identifier codes that are synced from PeopleSoft Billing to PeopleSoft CRM. The bill source code is a user-defined value in PeopleSoft Billing.

Note. You can use both the Bill Type and Bill Source fields to define bill by identifiers in PeopleSoft Billing. If CRM overrides the Bill Type and Bill Source fields on the Transaction Billing Processor billing plan with values defined in the CRM Billing Options page, then depending on the Bill By Identifier hierarchy in Billing, these values may be used to control the way that the invoices can be grouped.

On the Billing Options page, the Bill Type and Bill Source fields are optional. If they are not set in PeopleSoft CRM, the billing plan in the Transaction Billing Processor sets these fields based on the contracts business unit. PeopleSoft Billing still determines the bill by identifiers that are used based on its bill by identifier hierarchy.

Tax Options Tab

Use the fields within this tab to indicate where the order originated, where it will be accepted, and where the store is located. This information is used for tax purposes.

Setting Up Time Types for PeopleSoft Integrated FieldService

Access the Time Types page.

| *Time Type | *Short Description | *Description | Billable | |
|------------|--------------------|------------------------|-------------------------------------|--|
| 001 | Activity | Service Order Activity | <input checked="" type="checkbox"/> | |
| 002 | Break | Break Time | <input type="checkbox"/> | |
| 003 | Wait | Wait Time | <input checked="" type="checkbox"/> | |
| 004 | Travel | Travel Time | <input checked="" type="checkbox"/> | |

Time Types page

Use this page to establish time types and indicate to the system which time types are billable. The system uses this information on the Billing Options page when you are setting up business units. If you enter one or more time types for a given setID, all PeopleSoft Integrated FieldService business units that use that setID as a default inherit the time types for the setID, including the billable flag.

For example, if you select the *Billable* check box for the *Break* time type, the system selects it as billable in the Time Type grid on the Billing Options page for the PeopleSoft Integrated FieldService business unit.

- Time Type** Enter a number by which you want to order the time type that you are entering. The numbers that you enter determine the order in which the time types appear on the Billing Options page.
- Short Description and Description** Enter the short and long description of the time type.
- Billable** Select if you want to set the default to billable for the time type.

Note. If the installation option is not set to *Calculate Price on Service Orders*, then the system hides the Business Unit - Billing Option page, which contains the billable fields that you are entering on this page.

Setting Up Billing Options for PeopleSoft Integrated FieldService

Access the Billing Options page.

The screenshot shows the 'Billing Options' page with the following details:

- Billing Information:**
 - Contracts Business Unit: [Empty]
 - GL Business Unit: APP01
 - Bill Type: [Empty]
 - Bill Source: [Empty]
 - Material Billable
 - Expense Billable
 - Time Type Table:**

| Type | Billable |
|----------|--------------------------|
| Activity | <input type="checkbox"/> |
| Break | <input type="checkbox"/> |
| Travel | <input type="checkbox"/> |
| Wait | <input type="checkbox"/> |
- Tax Information:**
 - Order Origin Location: [Empty]
 - Order Acceptance Location: [Empty]
 - Location: KUNY00
 - Store Location: [Empty]

Billing Options page

Billing Information

Use the fields within this group box to enter the information that is needed for PeopleSoft Integrated FieldService to integrate with the Transaction Billing Processor. To apply revenue to the correct general ledger account for service order fees, link the business units for PeopleSoft Integrated FieldService, Contracts, and General Ledger. This information is included in the contract transaction message that the system sends to the Transaction Billing Processor when the service order closes.

Note. You can link only one general ledger business unit to a service order. You cannot override the GL Business Unit field from the service order. The system does not display this field on the Service Order page in PeopleSoft Integrated FieldService.

| | |
|--------------------------------|--|
| Contracts Business Unit | Enter the contracts business unit that you want to use for billing. |
| GL Business Unit | Enter the general ledger business unit that you want to use for billing. The prompt values for this field include all business units for all product lines. Populating this field enables mapping between the general ledger business unit and the field service business unit. The Service Order page does not display the general ledger business unit or contracts business unit. When a service order closes, the system sends the general ledger business unit, contracts business unit, and contract ID to the Transaction Billing Processor with other transaction information. |
| Bill Type | Select the bill type that you want associated with the business unit. The prompt values for the Bill Type field include all bill type identifier codes that are sent from PeopleSoft Billing to PeopleSoft CRM. |
| Bill Source | Enter the bill source that you want to associate with the business unit. The prompt values for the Bill Source field include all bill source identifier codes that are sent from PeopleSoft Billing to PeopleSoft CRM. |

Note. The system sends the Bill Type and Bill Source fields with every service order transaction if one or both are set on the FieldService Business Unit - Billing Options page.

| | |
|---|---|
| Material Billable and Expense Billable | Select the check boxes that you want to use for billing purposes on service orders for the business unit that you are defining. If you select the Send Billing Transaction to Contracts and Calculate Price on Service Orders check boxes on the Installation Options page, then the system automatically selects the Material Billable and Expense Billable check boxes. The system administrator, however, can override these values by clearing the check boxes. |
| Time Type and Billable | Select the Billable check box to make the time type a billable item on the service order for the business unit. Default time types are based on the setup of the time types. If you enter one or more time types for a given setID, all PeopleSoft Integrated FieldService business units that use that setID as the default setID inherit the time types of the setID, including the billable option. You can, however, override time types for a business unit. For example, if the time type for Break is not set to billable on the Time Types page, then the system does not display it in the Time Type section on this page. |

Tax Information

Use the fields on this tab to indicate where the order originated, where it will be accepted, and where the store is located. This information is used for tax purposes. The Order Origin Location, Order Acceptance Location, and Location fields prompt from the Location table (LOCATION_TBL), which is sent to PeopleSoft CRM through an EIP from PeopleSoft HCM and PeopleSoft FSCM.

Note. PeopleSoft Billing uses the fields in the Tax Information group box for integration to Vertex and Taxware, which are third-party tax vendors. Please refer to the setup for sales and use tax for third-party tax vendors for details on the function and behavior of each third-party tax field. These third-party tax fields are always blank when you first create a PeopleSoft Integrated FieldService business unit.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “Defining Business Units in PeopleSoft Integrated FieldService,” Defining FieldService Business Units

Chapter 5, “Setting Up an Integration to the Transaction Billing Processor,” Setting Up Sales and Use Tax for Third-Party Tax Vendors, page 97

Setting Up Billing Options for PeopleSoft Call Center

Access the Business Unit Billing Details page.

Business Unit Billing Details

| | | |
|----------------------|-------|----------------|
| Business Unit | COM01 | Communications |
|----------------------|-------|----------------|

Billing Information

| | | |
|--------------------------------|---------|-------------------|
| On Demand Price By | Case | |
| Currency Code | AUD | Australian Dollar |
| Rate Type | CRRNT | Current Rate |
| Contracts Business Unit | COM01 | Communications |
| GL Business Unit | COM01 | Communications |
| Bill Type | CA | CONTRACTS |
| Bill Source | SERVICE | Service |

Tax Information

| | | |
|----------------------------------|----------|--------------------------------|
| Order Origin Location | MAINHQ | GBAI Main Office - Headquarter |
| Order Acceptance Location | COMSHIP | California Shipping Location |
| Location | COMSHIP | California Shipping Location |
| Store Location | 123 Main | |

OK
Cancel
Refresh

Business Unit Billing Details page

Billing Information

Use the fields within this group box to enter the information that is needed for the integration to the Transaction Billing Processor.

On Demand Price By Select either *Hour* or *Case*.

This field provides the flexibility to price case transactions by hour or by case. For example, if you have a New York business unit and a California business unit, the New York unit could price a case by flat fee while the California unit could price the case by the total number of hours that an agent spends working on a case. This field is blank when you enter the page for the first time.

| | |
|--------------------------------|---|
| Currency Code | Enter the currency that you want to use for billing purposes for the business unit that you are defining. |
| Rate Type | Select the exchange rate type that is used to calculate monetary transaction amounts in alternate currencies. |
| Contracts Business Unit | Enter the contracts business unit that you want to use for billing. |
| GL Business Unit | Enter the general ledger business unit that you want to use for billing. The prompt values for this field include all business units for all product lines. Populating this field enables mapping between the general ledger business unit and the call center business unit. The Case page does not display the general ledger business unit. It does display the contracts business unit, which appears by default from the agreement. When a case closes, the system sends the general ledger business unit, contracts business unit, and contract ID to the Transaction Billing Processor with other transaction information. |
| Bill Type | Select the bill type that you want associated with the business unit. The prompt values for this field include all bill type identifier codes that are sent from PeopleSoft Billing to PeopleSoft CRM. The bill type code is a user-defined value in PeopleSoft Billing. Sample data includes <i>SVC</i> (Service), <i>CASE</i> , and <i>CRM_ORDER</i> . |
| Bill Source | Enter the bill source that you want associated with the business unit. The Bill Source field prompts on all bill source identifier codes that are sent from PeopleSoft Billing to PeopleSoft CRM. The bill source code is a user-defined value in PeopleSoft Billing. Sample data includes <i>SERVICE</i> , <i>OES</i> (Order Entry System), and <i>GSO</i> (General Service Orders). |

Note. The system sends the Bill Type and Bill Source fields with every transaction if one or both are set up on the Business Unit Billing Details page.

See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, “Defining Call Center Business Units and Display Template Options,” Defining Call Center Business Units.

Tax Information

Use the fields on this tab to indicate where the order originated, where it will be accepted, and where the store is located. This information is used for tax purposes. The Order Origin Location, Order Acceptance Location, and Location fields prompt from the Location table (LOCATION_TBL), which is sent to PeopleSoft CRM through an EIP from PeopleSoft HCM.

Note. The fields in the Tax Information group box are used by PeopleSoft Billing for integration to Vertex and Taxware, which are third-party tax vendors. Please refer to the setup for sales and use tax for third-party tax vendors for details on the function and behavior of each third-party tax field. These third-party tax fields are always blank when you first create a business unit for a PeopleSoft call center application.

See Chapter 5, “Setting Up an Integration to the Transaction Billing Processor,” Setting Up Sales and Use Tax for Third-Party Tax Vendors, page 97.

Setting Up Billing Options for PeopleSoft Order Capture

Access the Order Capture Definition - Internal page.

| | | | | | |
|--|--|---|---|-----------------------|--|
| Internal | | Self Service | | Communications | |
| Business Unit COM01 | | | | | |
| *Description <input type="text" value="Communications"/> | | | *Status <input type="text" value="Open"/> | | |
| *Short Description <input type="text" value="COM01"/> | | | <input type="checkbox"/> Default Business Unit <input type="checkbox"/> Submit Confirmation <input checked="" type="checkbox"/> Show Communications Tab | | |
| Business Unit | | | | | |
| FieldService <input type="text" value="COM01"/> | | Marketing <input type="text" value="COM01"/> | | | |
| Order Management <input type="text" value="COM01"/> | | Proposal Management <input type="text"/> | | | |
| Contracts <input type="text" value="COM01"/> | | General Ledger <input type="text" value="COM01"/> | | | |
| Tax Settings | | | | | |
| *Tax Vendor <input type="text" value="None"/> Test Tax Interlink | | | Company <input type="text" value="PSFT"/> | | |
| Order Origin <input type="text" value="California Shipping Location"/> | | | Division <input type="text"/> | | |
| Order Acceptance <input type="text" value="California Shipping Location"/> | | | Store Location <input type="text"/> | | |

Order Capture Definition - Internal page (1 of 3)

| | | | | | |
|---|--|--|---|--|--|
| Order Capture | | | | | |
| *Freight Vendor <input type="text" value="None"/> Test Freight | | | *Card Vendor <input type="text" value="None"/> | | |
| Ship From <input type="text" value="California Shipping Location"/> | | | Source <input type="text" value="Phone"/> | | |
| Preferred Carrier <input type="text" value="UPS 2nd Day Air"/> | | | Capture Priority <input type="text"/> | | |
| Quote Conversion Warning <input type="text" value="No Warning"/> | | | Base Currency <input type="text" value="US Dollar"/> | | |
| *Site Address Includes <input type="text" value="Customer Bill To Addresses"/> | | | Rate Type <input type="text" value="Average"/> | | |
| Fulfillment Specialist Email <input type="text"/> | | | Credit Rating Value <input type="text"/> | | |
| Catalog Refresh (Minutes) <input type="text"/> | | | Quote Valid For <input type="text" value="30"/> Days Quote Due <input type="text" value="10"/> | | |
| Bill Type Identifier <input type="text"/> | | | Bill Source <input type="text"/> | | |
| Default Service Duration <input type="text"/> <input type="text" value="Months"/> | | | Quote Conversion <input type="text" value="Convert to Order and Subm"/> | | |
| Order Level Adjustments <input type="text" value="Do Not Prorate Adjustments"/> | | | Schedule <input type="text"/> | | |
| Subscription Term <input type="text"/> | | | Clone Options | | |
| Non-submitted Order Valid For <input type="checkbox"/> | | | <input type="checkbox"/> Copy Line Adjustment <input checked="" type="checkbox"/> Copy Header Adjustment | | |
| <input type="checkbox"/> Allow Line AAF Processing Agreement Coverage Grid <input type="text" value="Always Populate Grid"/> | | | | | |
| Order Change Notifications | | | Advisor Dialogs | | |
| Accepted <input type="text" value="Notify Nobody"/> | | | <input type="checkbox"/> Display Session Information | | |
| Partially Accepted <input type="text" value="Notify Nobody"/> | | | | | |
| Rejected <input type="text" value="Notify Nobody"/> | | | | | |

Order Capture Definition - Internal page (2 of 3)

| | |
|--|---|
| Bulk Order | |
| Consumer Hierarchy | CONS_HIERARCHY <input type="text"/> <input type="button" value="🔍"/> |
| Organization Hierarchy | CUST_HIERARCHY <input type="text"/> <input type="button" value="🔍"/> |
| <input checked="" type="checkbox"/> Multiple Orders Per Recipient | |
| Fulfillment | |
| <input type="checkbox"/> Fulfillment Logging | |
| Catalog Display Options | |
| <input checked="" type="checkbox"/> Display By Customer | Priority <input type="text" value="2"/> <input type="button" value="▼"/> |
| <input checked="" type="checkbox"/> Display By Partner Contact | <input type="text" value="1"/> <input type="button" value="▼"/> |
| <input checked="" type="checkbox"/> Display By User | <input type="text" value="3"/> <input type="button" value="▼"/> |
| <input type="checkbox"/> Display Browse Catalog | |
| Order Submission | |
| <input checked="" type="checkbox"/> Allow Future Dated Orders | Submission Mode <input type="text" value="Only Queue Future Dated Or"/> <input type="button" value="▼"/> |
| <input type="checkbox"/> Allow Temporary Services | Price Order <input type="text" value="Price at Save"/> <input type="button" value="▼"/> |
| <input checked="" type="checkbox"/> Line Dates Editable on Order | |
| <input checked="" type="checkbox"/> Use Lead Time for Start Date | |
| Modified | 04/24/2006 2:21PM PDT gscott |

Order Capture Definition - Internal page (3 of 3)

To set up billing options for PeopleSoft Order Capture, you must establish values for the Contracts, General Ledger, Bill Type, Bill Source, and Default Service Duration fields.

- Contracts** Enter the contracts business unit that you want to use for billing.
- General Ledger** Enter the general ledger business unit that you want to use for billing. The prompt values for this field include all business units for all product lines. Populating this field enables mapping between the general ledger business unit and the order capture business unit.
- Bill Type Identifier** Select the bill type that you want associated with the business unit.
The prompt values for this field include all bill type identifier codes that are sent from PeopleSoft Billing to PeopleSoft CRM. The bill type code is a user-defined value in PeopleSoft Billing. Sample data includes *SVC* (Service), *CASE*, and *CRM_ORDER*.
- Bill Source** Enter the bill source that you want associated with the business unit.
The Bill Source field prompts on all bill source identifier codes that are sent from PeopleSoft Billing to PeopleSoft CRM. The bill source code is a user-defined value in PeopleSoft Billing. Sample data includes *SERVICE*, *OES* (Order Entry System), and *GSO* (General Service Orders).

Note. The system sends the Bill Type and Bill Source fields with every transaction if one or both are set up on the Business Unit Billing Details page.

- Default Service Duration** Enter the default duration for service products. This value is used to calculate the service end date for service products ordered through order capture by adding the duration to the service start date. The duration specified in the order capture business unit is used when the duration on the product definition is blank.

For more information on setting up billing options, refer to this PeopleBook:

See Also

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, “Defining Order Capture Business Units”

Defining Tax Parameters

Access the Tax Parameter Definitions page.

See Also

Chapter 5, “Setting Up an Integration to the Transaction Billing Processor,” Page Used to Set Up Sales and Use Tax for Third-Party Tax Vendors, page 98

Working with On-Demand Billing

This section provides an overview of on-demand billing and discusses how to set up on-demand billing transactions.

Understanding On-Demand Billing

This section discusses:

- Overview
- Setup
- Contract creation and processing
- Integration points
- Error handling

Note. On-demand billing is specific to PeopleSoft CRM FieldService and CRM Support.

Overview

On-demand billing provides back office processing for one-time fee transactions for service orders and cases. These transactions are not linked to agreements. The fees are usually one-time fees that are billed to the customer. Through an integration with the Transaction Billing Processor, you can bill and book revenue for on-demand service fees for cases and service orders.

Note. PeopleSoft CRM enables the system to bill on-demand transactions through the Transaction Billing Processor. The same messages and interface tables are used. Revenue recognition for on-demand transactions is managed by PeopleSoft Billing through the Contracts Billing Interface (CA_BI_INTFC) process.

Here is an overview of the on-demand functionality:

- Through PeopleSoft Contracts, on-demand cases and service orders are processed through the Transaction Billing Processor and General Ledger for billing and revenue.

- PeopleSoft CRM identifies a transaction as on demand when passing the transaction from PeopleSoft CRM to the Transaction Billing Processor.
- Closure of a service order or case in PeopleSoft CRM triggers the sending of transaction information from PeopleSoft CRM to the Transaction Billing Processor.

PeopleSoft CRM determines whether a new contract is created or if an existing contract is used based on the sold to customer. PeopleSoft CRM requests one on-demand contract per sold to customer and PeopleSoft Contracts business unit mapping.

- The Transaction Billing Processor launches the revenue and billing processes immediately after the on-demand transaction loads into the contract staging table (INTERFACE_CA) without any manual intervention.
- If a failure occurs during the creation of the contract or during processing of the on-demand transaction, the system does not create the contract or process the transaction.

The system sends an error message to PeopleSoft CRM with the failure reason. In this case, you must resubmit the transaction.

Note. The Transaction Billing Processor allows no visibility to on-demand contract lines in any components, processes, or reports. Deferred revenue is not applicable for on-demand transactions.

Setup

To implement on-demand transaction processing, you must set up:

- PeopleSoft Contracts business units.
- Contract statuses.
- Accounting definitions.
- Accounting rules.
- Billing plan detail template (optional).

Before creating on-demand contracts, set up the contract business unit and contract status. Additionally, you must set up the accounting rules for on-demand transactions to ensure that the system allows only one *REV* row per transaction. You must also select the Transaction Billing check box on the Installed Products page.

You have the option to create a billing plan detail template to populate or override the fields on the billing plan. Select the billing plan detail template on the Contract Definition - BU Options page. If you select a template on this page, the billing plan detail template populates or overrides the corresponding fields on the billing plan when the billing plan is created.

Contract Creation and Processing

PeopleSoft Integrated FieldService and Support send one-time fee transactions to the Transaction Billing Processor to use the contracts functionality to bill and book revenue. The Transaction Billing Processor initiates billing processing and completes both revenue and billing processing for on-demand transactions.

The system completes these steps to create and process on-demand transactions through the Transaction Billing Processor:

1. If the service order or case is not covered by an agreement, the system sends the transaction to the Transaction Billing Processor as an on-demand transaction when a PeopleSoft CRM Support case or FieldService service order is closed.

2. The first time PeopleSoft CRM creates an on-demand service order or case, the system searches for the sold to customer or PeopleSoft Integrated FieldService or Support business unit to map to the PeopleSoft Contracts business unit and contract number.

If the search does not find a mapping, PeopleSoft CRM sends a contract request message (CONTRACT_REQUEST) to the Transaction Billing Processor to create a new on-demand contract. PeopleSoft CRM sends a contract request message only when the system needs to create a new contract. The request message from PeopleSoft CRM specifies the transaction type (service order or case).

3. The Transaction Billing Processor creates an on-demand contract and sends a contract response message (CONTRACT_RESPONSE) to PeopleSoft CRM providing the contract business unit, contract number, contract line number, error status, and error message.

The system creates the contract and contract lines, including an *As-incurred* billing plan, using the CA_HDR_CI component interface. On success, the Transaction Billing Processor responds to PeopleSoft CRM with the new contract number.

4. On receipt of the contract response message, PeopleSoft CRM sends the transaction to the Transaction Billing Processor through a transaction message (CONTRACT_TXN) with all necessary data for the invoicing and booking revenue.

In the transaction message, the contract number identifies a particular contract. Each transaction is unique and is marked by its own transaction ID (CA_TXN_ID). For all future transactions for the same sold to customer, only the transaction (through the transaction message) is sent to the Transaction Billing Processor.

5. the Transaction Billing Processor retrieves the transaction data and loads the on-demand transaction from PeopleSoft CRM into the contract staging tables (INTFC_CA).

Loading the contract staging tables triggers both the revenue process to apply the revenue to the appropriate account and billing process to generate the invoice to run. The transaction populates the contract interface tables, initiates the Billing Interface process (CA_BI_INTFC), and prepares the transaction for billing processing. Revenue recognition is handled by PeopleSoft Billing.

If errors occur during processing, the system sends a reply message to PeopleSoft CRM containing the contract business unit, contract number, contract line number, CRM identifier, and status indicating that the process failed.

If the transaction posts successfully to both PeopleSoft General Ledger and PeopleSoft Billing, the system sends a reply message to PeopleSoft CRM containing the contract business unit, contract number, contract line number, CRM identifier, and status indicating that the process succeeded. The response message is CONTRACT_RESPONSE for both request and transaction messages, and it contains the appropriate success and failure codes and descriptions.

6. The CRM transaction changes the billing status from *submitted* to *completed*. This action marks the end of the PeopleSoft CRM processing. Contracts that are created for on-demand transactions are not visible in the front end on the Transaction billing Processor.
7. PeopleSoft Billing runs the Billing Interface and Finalization processes.

Integration Points

These are the four major steps in the integration process between PeopleSoft CRM and PeopleSoft Contracts for on-demand contracts:

1. Create a billing plan.
2. Create a contract.
3. Populate the Contracts interface tables.

4. Process billing.

Creating a billing plan, creating a contract, and populating the interface table are the same steps that occur with agreement-based processing. These steps use the contract request (CONTRACT_REQUEST and CONTRACT_RESPONSE) and transaction (CONTRACT_TXN) messages. The last step, process billing, differs from agreement-based transactions since billing for on-demand contracts takes place immediately through PeopleSoft Billing.

With agreement-based billing, you have control over the billing plan in PeopleSoft Contracts, and you can make changes to the contract before it goes to PeopleSoft Billing for processing. The on-demand process uses the same integration points as agreement-based transactions.

Error Handling

Errors can occur during the contract and billing plan creation process, when the system loads the staging table, or when the system runs the revenue and billing processes. The Transaction Billing Processor initiates billing processing and sends the transactions to PeopleSoft Billing. PeopleSoft Billing completes both the revenue and billing processing for on-demand transactions.

Here is how the system handles errors:

- If a failure occurs during contract creation, the system creates the contract in a *cancelled* status and a response is sent back to PeopleSoft CRM with a message stating the nature of the error.

Once you correct the error manually, you must resubmit the transaction.

- If a contract was successfully created and is ready for billing, but the transaction fails to populate the contract interface tables, the transaction is not created, and the response message sends an error message back to PeopleSoft CRM stating the cause of the error.

Once you correct the problem manually, you must resubmit the transaction. PeopleSoft CRM resubmits only the Contract Transaction message since the contract has already been created.

- If errors are triggered during the revenue or billing processes, each process sends a response message back to PeopleSoft CRM with the failure and message.

Once you correct the problem manually, you must resubmit the transaction. PeopleSoft CRM resubmits only the Contract Transaction message since the contract has already been created.

Setting Up On-Demand Transactions

This section lists the pages used to set up on demand transactions in PeopleSoft Financials and Supply Chain Management.

Pages Used for Setting Up On-Demand Transactions

| Page Name | Object Name | Navigation | Usage |
|---|-----------------|--|---|
| Installation Options - Installed Products | INSTALLATION_FS | Set Up Financials/Supply Chain, Install, Installation Options Click the Products link in the General Options group box. | Select the Contracts Transaction Billing check box to indicate that this product is installed on the system. |
| Contracts Definition - BU Definition | BUS_UNIT_TBL_CA | Set Up Financials/Supply Chain, Business Unit Related, Contracts, Contracts Definition, BU Definition | Create a new PeopleSoft Contracts business unit definition or manage an existing business unit. |
| Contracts Definition - BU Options | BUS_UNIT_OPT_CA | Set Up Financials/Supply Chain, Business Unit Related, Contracts, Contracts Definition, BU Options | Select a bill plan template ID to use to override the fields on the billing plan (optional). If you select a template on this page, when the billing plan is created the billing plan detail template overrides the corresponding fields on the billing plan. |
| Contract Status | CA_STATUS_PNL | Set Up Financials/Supply Chain, Product Related, Contracts, General Options, Contract Status | Define contract statuses and map them to processing statuses. The system uses the contract status to control all processing that can occur against a contract. |
| CRM Accounting Rules | CA_ACCT_CRM | Customer Contracts, Create and Amend, CRM Acct Distribution | Define the accounting rules to apply to PeopleSoft CRM transactions. Set up the accounting rules for on-demand transactions to ensure that the system enables only one <i>REV</i> row per transaction. |

Setting Up Installation Options

Access the Installation Options - Installed Products page.

Select the Contracts Transaction Billing check box to indicate that this product is installed on the system.

See Also

PeopleSoft Enterprise Components for PeopleSoft Enterprise Financial Management Solutions, Enterprise Service Automation, Asset Lifecycle Management, and Supply Chain Management PeopleBook, "Administering the Framework," Setting Log and Installation Options."

Creating new PeopleSoft Contracts Business Unit Definitions

Access the Contracts Definition - BU Definition page.

For detailed instructions, refer to the *PeopleSoft Enterprise Contracts PeopleBook*.

See Also

PeopleSoft Enterprise Contracts PeopleBook, “Defining PeopleSoft Contracts Business Units”

Selecting a Bill Plan Template ID

Access the Contracts Definition - BU Options page.

For detailed instructions, refer to the *PeopleSoft Enterprise Contracts PeopleBook*.

See Also

PeopleSoft Enterprise Contracts PeopleBook, “Defining PeopleSoft Contracts Business Units”

Setting Up Contract Statuses

Access the Contract Status page.

For detailed instructions, refer to the *PeopleSoft Enterprise Contracts PeopleBook*.

See Also

PeopleSoft Enterprise Contracts PeopleBook, “Structuring Contracts”

Setting Up CRM Accounting Rules

Access the CRM Accounting Rules page.

For detailed instructions, refer to the *PeopleSoft Enterprise Contracts PeopleBook*.

See Also

PeopleSoft Enterprise Contracts PeopleBook, “Setting Up the Transaction Billing Processor”

Setting Up Sales and Use Tax for Third-Party Tax Vendors

This section provides an overview of the tax setup for third-party tax vendors, lists the common elements used in this section, and discusses how to set up sales and use tax for third-party tax vendors.

To enter sales and use tax, use the Tax Parameters (RF_TAX_PARAM) component. To load data into the tables for this component, you can also use the RF_TAX_PARAM component interface.

Understanding Tax Setup for Third-Party Tax Vendors

Use the Tax Parameter Definitions page to integrate with third-party tax vendors, such as Taxware or Vertex. The system passes the values in the fields that appear on the page to the Transaction Billing Processor with every PeopleSoft CRM transaction and uses the values during invoice finalization when the taxes are calculated.

You can calculate Sales and Use Tax in one of two ways in PeopleSoft Billing, either the third-party tax calculations or the PeopleSoft internal tax calculation. Basically, the tax code and the address overrides are used for calculating taxes through the PeopleSoft internal system.

The data required for the internal tax calculation is sent through the integration with the Transaction Billing Processor. If the Billing business unit on the SCM side is configured for the PeopleSoft internal tax calculation, it calculates the taxes. It is basically the tax code.

You can define fields for each type of transaction (agreement fees, service order fees, and case fees) independent of each other. Use the fields listed in the next section only if you have a third-party integration with either Taxware or Vertex.

See Also

Enterprise PeopleTools PeopleBook: Integration Broker

Enterprise PeopleTools PeopleBook: PeopleSoft Integration Testing Utilities and Tools

Enterprise PeopleTools PeopleBook: PeopleSoft Business Interlinks

Common Elements Used in This Section

Product Tax Group

Identify special tax-related charge information associated with individual transaction lines. For example, a laptop computer for the hearing impaired might receive a better rate than a laptop computer that doesn't have a feature for the hearing impaired.

The values for this field come from the Product Group table. You may, however, enter free-form values. This is not a required field, so you may leave it blank.

See *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook*, "Product and Item Management".

Note. These values should match the values defined by either Taxware or Vertex. As the administrator, you must enter the values accurately because no interface exists to verify that the tax group is a valid Taxware product code or Vertex product group.

Transaction Type

Determines how a vendor can calculate taxes. For example, the State of Illinois charges a six percent sales tax for purchases. This field includes these translate values: *Rental*, *Sales*, and *Service*. It is not a required field and may be left blank.

Transactions Sub Type

Use for reporting purposes with the Vertex product only. This field is tied to the Transaction Type field and has predefined translate values that include *Expense*, *Freight*, *Misc*, *None*, *Property*, *Rental*, and *Service*. It is not required and may be left blank.

Page Used to Set Up Sales and Use Tax for Third-Party Tax Vendors

| Page Name | Object Name | Navigation | Usage |
|---------------------------|--------------|--|---|
| Tax Parameter Definitions | RF_TAX_PARAM | Set Up CRM, Common Definitions, Tax Parameter Definition, Tax Parameter Definition | Set up sales and use taxes for service, material, labor, expenses, and cases for third-party tax vendors. |

Setting Up Sales and Use Tax for Third-Party Tax Vendors

Access the Tax Parameter Definitions page.

Tax Parameter Definitions

SetID CRM01

[Service](#) | [Material](#) | [Labor](#) | [Expense](#) | [Support](#) | [All](#)

Service Sales and Use Tax

[Customize](#) | [Find](#) | [View All](#) | | First 1-2 of 2 Last

| *Service Type | Service ID | Service | Product Tax Group | Transaction Type | Transaction Sub Type | |
|---------------|------------|------------|-------------------|--|--|--|
| Repair | APP0000006 | Repair A/C | A/C | Service <input type="button" value="▼"/> | Service <input type="button" value="▼"/> | |
| PM | APP0000001 | PM for A/C | A/C | Sale <input type="button" value="▼"/> | Expense <input type="button" value="▼"/> | |

Material Sales and Use Tax

[Customize](#) | [Find](#) | [View All](#) | | First 1 of 1 Last

| Item Group | Item ID | Product Tax Group | Transaction Type | Transaction Sub Type | |
|-----------------|---------|-------------------|---------------------------------------|---------------------------------------|--|
| AIR CONDITIONER | 10009 | A/C | Sale <input type="button" value="▼"/> | None <input type="button" value="▼"/> | |

Labor Sales and Use Tax

[Customize](#) | [Find](#) | [View All](#) | | First 1 of 1 Last

| *Cost Category | Product Tax Group | Transaction Type | Transaction Sub Type | |
|----------------|-------------------|--|---------------------------------------|--|
| Travel | A/C | Service <input type="button" value="▼"/> | None <input type="button" value="▼"/> | |

Tax Parameter Definitions page (1 of 2)

Expense Sales and Use Tax

[Customize](#) | [Find](#) | [View All](#) | | First 1 of 1 Last

| *Expense Type | Product Tax Group | Transaction Type | Transaction Sub Type | |
|--|-------------------|--|---------------------------------------|--|
| Mileage <input type="button" value="▼"/> | A/C | Service <input type="button" value="▼"/> | None <input type="button" value="▼"/> | |

Support Sales and Use Tax

[Customize](#) | [Find](#) | [View All](#) | | First 1 of 1 Last

| *Product | Case Type | Source | Product Tax Group | Transaction Type | Transaction Sub Type | |
|----------------------|------------|--------|-------------------|--|---------------------------------------|--|
| Air Cond, Control Un | Service Re | PHONE | A/C | Service <input type="button" value="▼"/> | None <input type="button" value="▼"/> | |

Tax Parameter Definitions page (2 of 2)

Service Sales and Use Tax

Select the service type and service ID for which you want to enter tax information. To add additional rows of information, click the Add Service Sales and Use Tax button.

Material Sales and Use Tax

Select the item group and item ID for which you want to enter tax information. To add additional rows of information, click the Add Material Sales and Use Tax button.

Labor Sales and Use Tax

Select the cost category for which you want to enter tax information. To add additional rows of information, click the Add Labor Sales and Use Tax button.

Expense Sales and Use Tax

Select the expense type for which you want to enter tax information. To add additional rows of information, click the Add Expense Sales and Use Tax button.

Support Sales and Use Tax

Select the product and case type for which you want to enter tax information. To add additional rows of information, click the Add Support Sales and Use Tax button.

PART 4

ESRI Integration

Chapter 6

Setting Up ESRI Integration

CHAPTER 6

Setting Up ESRI Integration

This chapter provides overviews of geographical information systems, Environmental Systems Research Institute (ESRI) integration, and ESRI processes and discusses how to:

- Set up Integration Broker for ESRI integration.
- Set up integration flags.
- Set up ESRI integration.
- Access the Map Dashboard.
- View the Map Dashboard.
- View geocode errors.

Understanding Geographical Information Systems

ESRI is a geographical information system (GIS) and mapping software solution. Using ESRI's mapping and GIS software, you can spatially enable the geographical data. The GIS can be an effective way to explain events, predict outcomes, or plan strategies.

The cornerstone of GIS is location information. Addresses are actually the most common form of location information. An address specifies a location in much the same way as a geographic coordinate does. But, addresses are merely text strings containing a house number, street name, direction, and postal code. The GIS needs a mechanism to calculate geographic location coordinates such as latitude and longitude before you can display them on a map.

Use address geocoding to display tabular data containing addresses as points on a map.

Use geocodes and ESRI mapping functionality to generate incident-related maps that are tailored to your business needs. For example, you can use this functionality to show:

- Incidents or cases of the same type on a map.
- All types of incidents in a given area.

Note. For information on installing the ESRI software, refer to the installation documentation that was provided by ESRI when you purchased the ESRI software.

Understanding ESRI Integration

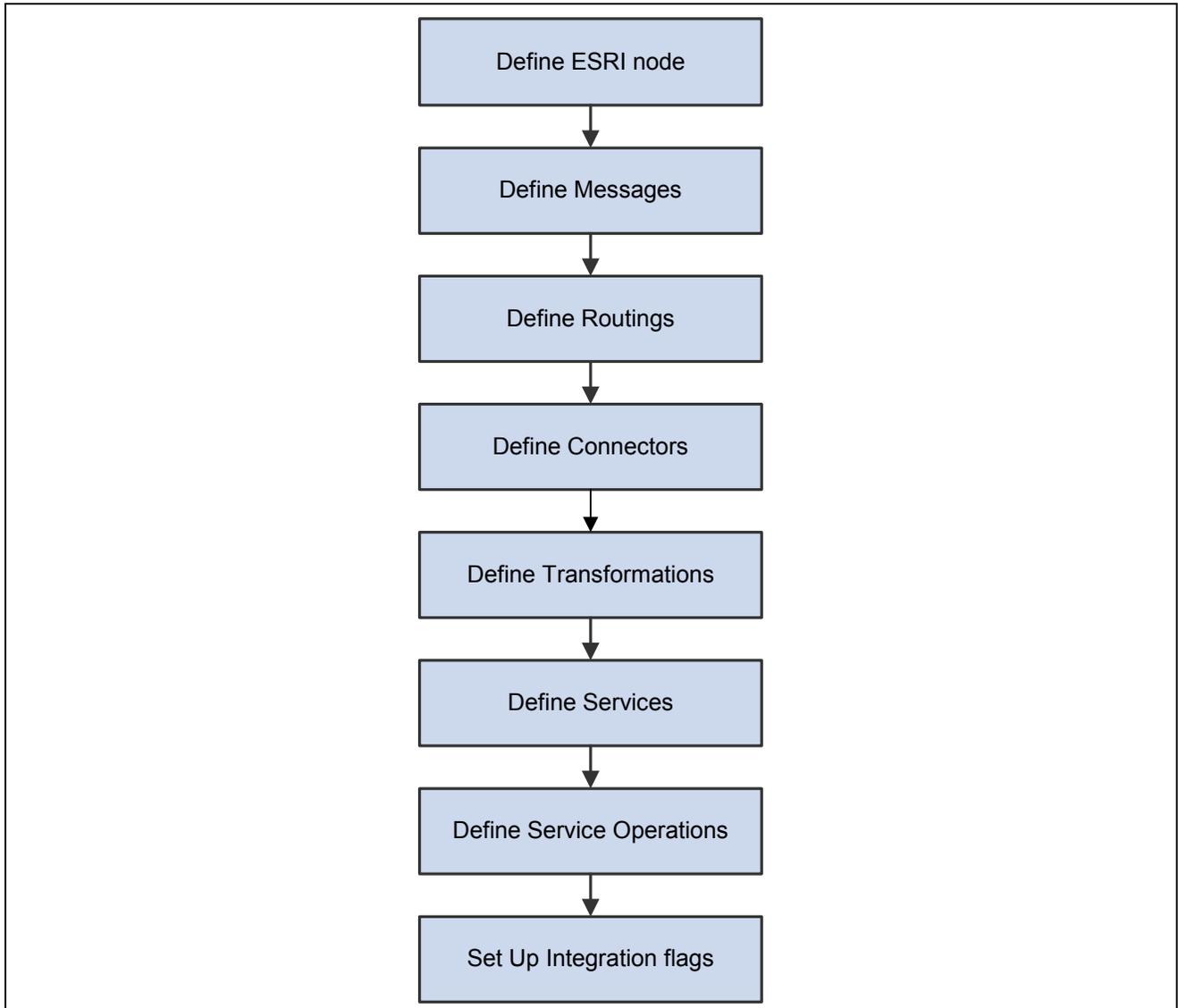
Setting up ESRI integration is a two-step process:

1. Set up Integration Broker for address geocoding, map extent, and map integrations.

2. Set up the integration with ESRI for map and query definitions.

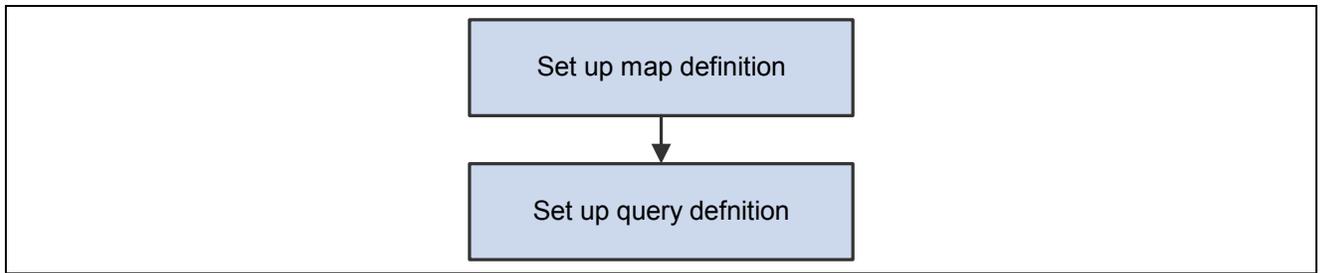
Note. PeopleSoft Customer Relationship Management (CRM) integrates with ArcIMS 4.0 and ArcIMS 9.0. ArcIMS provides the foundation for distributing high-end GIS and mapping services using the internet. ArcIMS software enables users to integrate local data sources with internet data sources for display, query, and analysis in an easy-to-use web browser.

This flowchart illustrates the steps that you follow to set up Integration Broker for the ESRI integration:



Integration Broker setup for the ESRI integration

This flowchart illustrates the steps you follow to set up the ESRI integration:



ESRI integration setup

Understanding ESRI Processes

Once ESRI is installed and you have set up the integrations, three processes occur on an ongoing basis: geocode retrieval, map service information updating, and map generation.

This section discusses:

- Geocode addresses
- Map service information
- Map generation

Geocode Addresses

PeopleSoft CRM stores geocodes for all consumer and company addresses, case addresses or locations, and service order addresses or locations. You can enter either an absolute address, which requires address and the postal code, or an intersection, which requires two cross streets and an optional postal code.

Geocoding is available for U.S. addresses only.

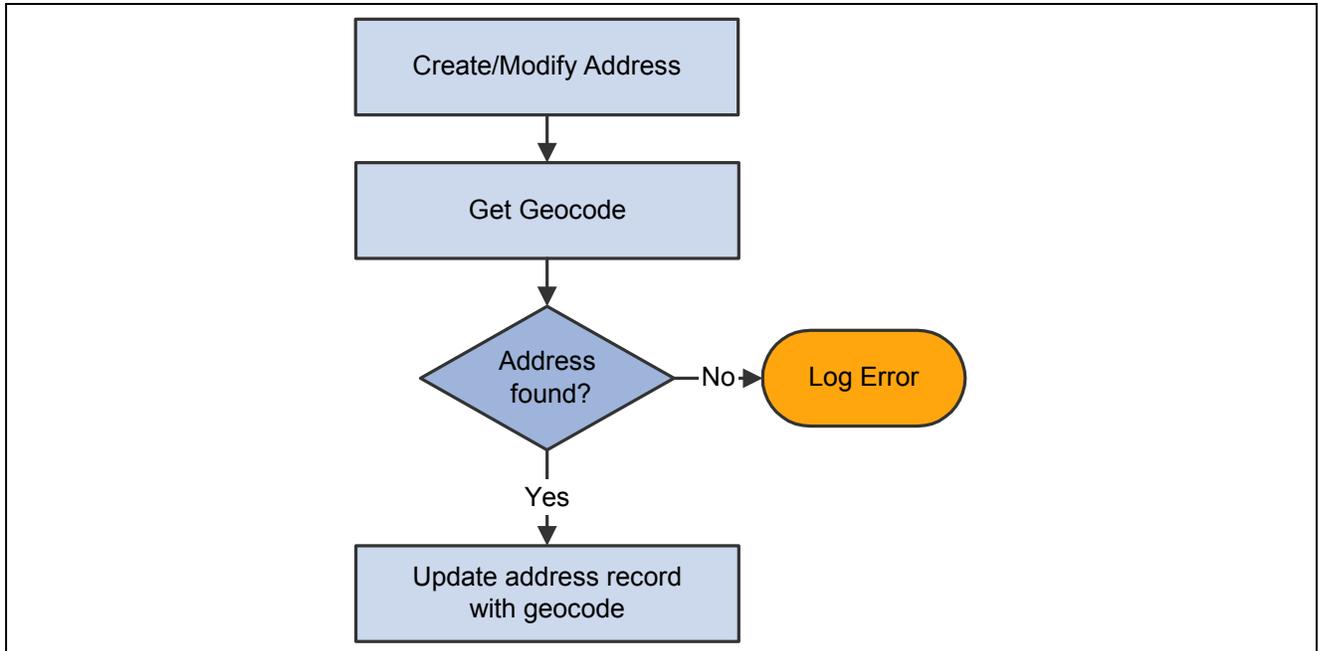
Note. The Geocode Integration check box on the Installation Options page must be selected to enable geocode address functionality.

You have two options for obtaining geocode addresses:

- Synchronous, real-time connection with ESRI.
- Scheduled batch job that runs periodically.

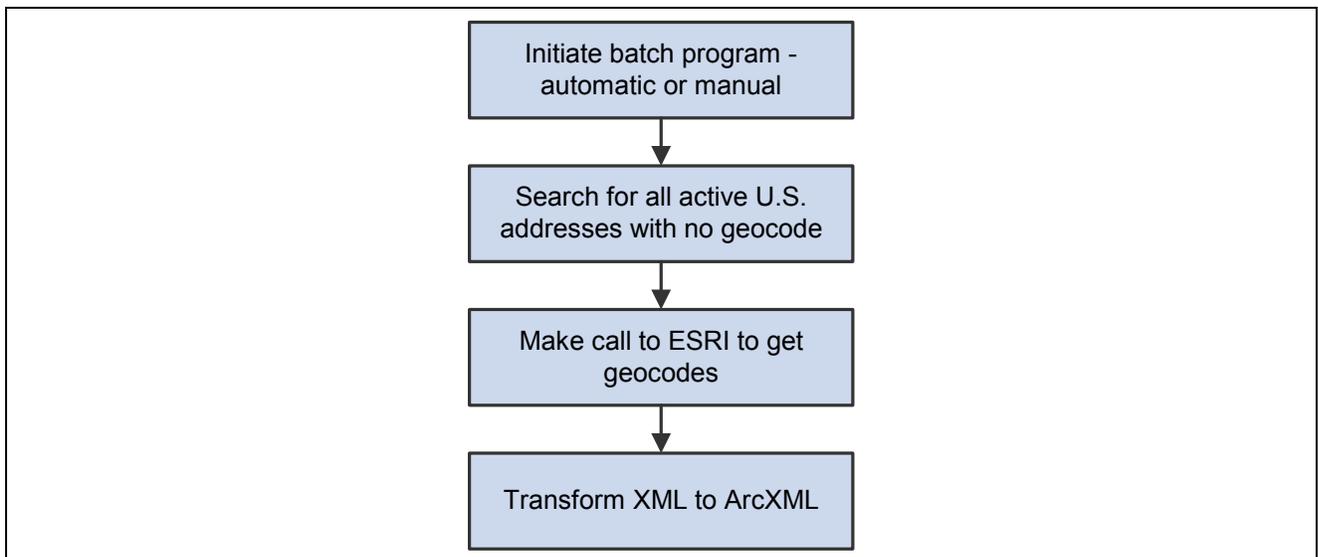
You can obtain geocodes from ESRI in synchronous real time. When you create or modify an address, the system calls ESRI to get the geocode. If the geocode is found, the system updates the address record with the geocode. If no geocode is found, the system logs an error.

This flowchart illustrates the request process for synchronous geocode addresses:



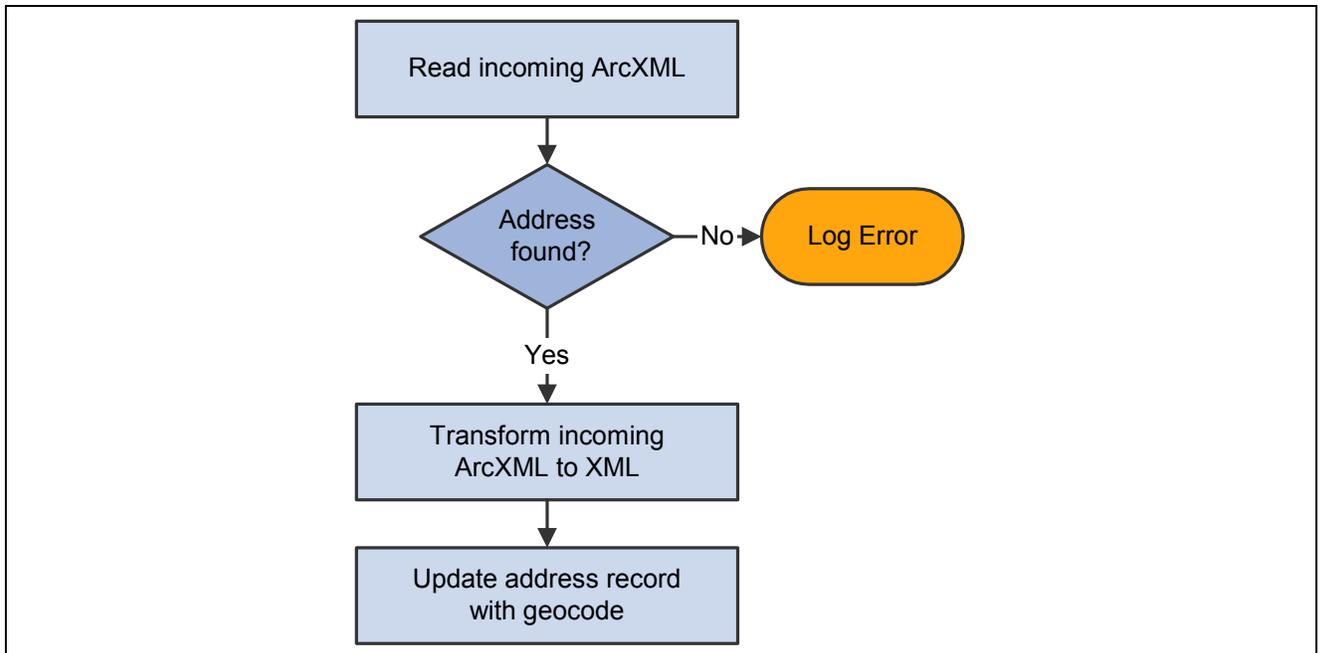
Request process flow for synchronous geocode addresses

Geocodes for addresses can be obtained by a scheduled job that runs periodically. When you first set up the system, use this method to retrieve geocodes for addresses. You can also run this process periodically to pick up any addresses that do not have geocodes. The address record is updated with geocodes obtained from the ESRI system. The system transforms the address or intersection information from XML to ArcXML and sends it to ESRI. This flowchart illustrates the outbound process flow for obtaining geocode addresses using a batch process:



Request process flow for batch geocode addresses

ESRI publishes the geocode for the address or intersection. If no geocode is found, an error is logged. If a corresponding geocode is found, the PeopleSoft system transforms the incoming ArcXML sent by ESRI to XML. The address record is updated with the geocode. This flowchart illustrates the inbound process flow for geocode retrieval:



Reply process flow for geocode addresses

The RBG_GEO_CODE_US channel is used for the PeopleSoft ESRI integration. This table lists the EIPs for geocode retrieval:

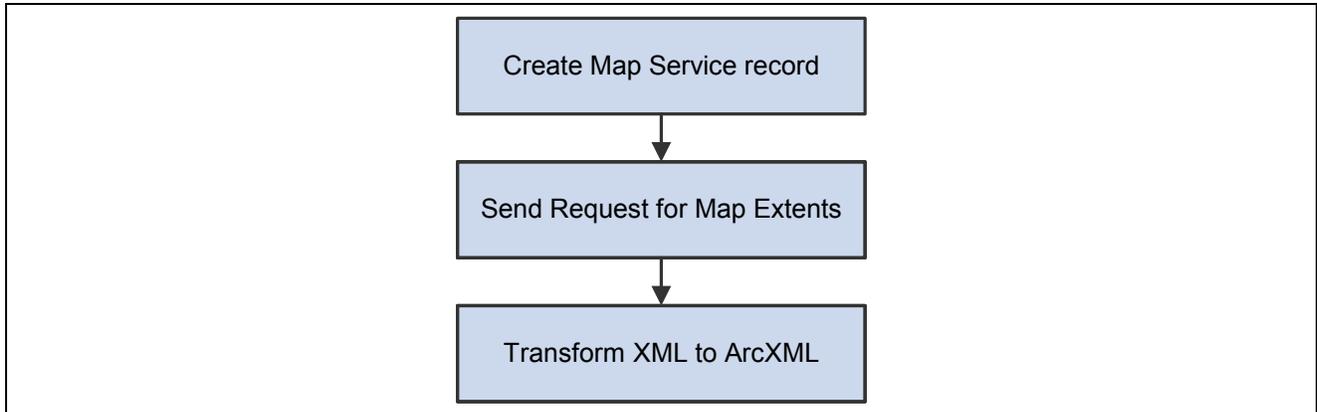
| EIP Name | Description | Message Name | Direction of Integration | Technology |
|----------------------------|-----------------------------------|--------------------------|--------------------------|--------------------|
| Request Message Definition | Address information | RBG_SYNC_ADDRESS_US_MSG | CRM → ESRI | Integration Broker |
| Reply Message Definition | Geocode for the requested address | RBG_SYNC_GEO_CODE_US_MSG | ESRI → CRM | Integration Broker |

Map Service Information

Each map that is available in the system is called a map service. You can use one map or a number of different maps, depending on your business needs. For example, you can access a city map, a state map, and a map of the U.S. The number of map services to which you can subscribe is not restricted.

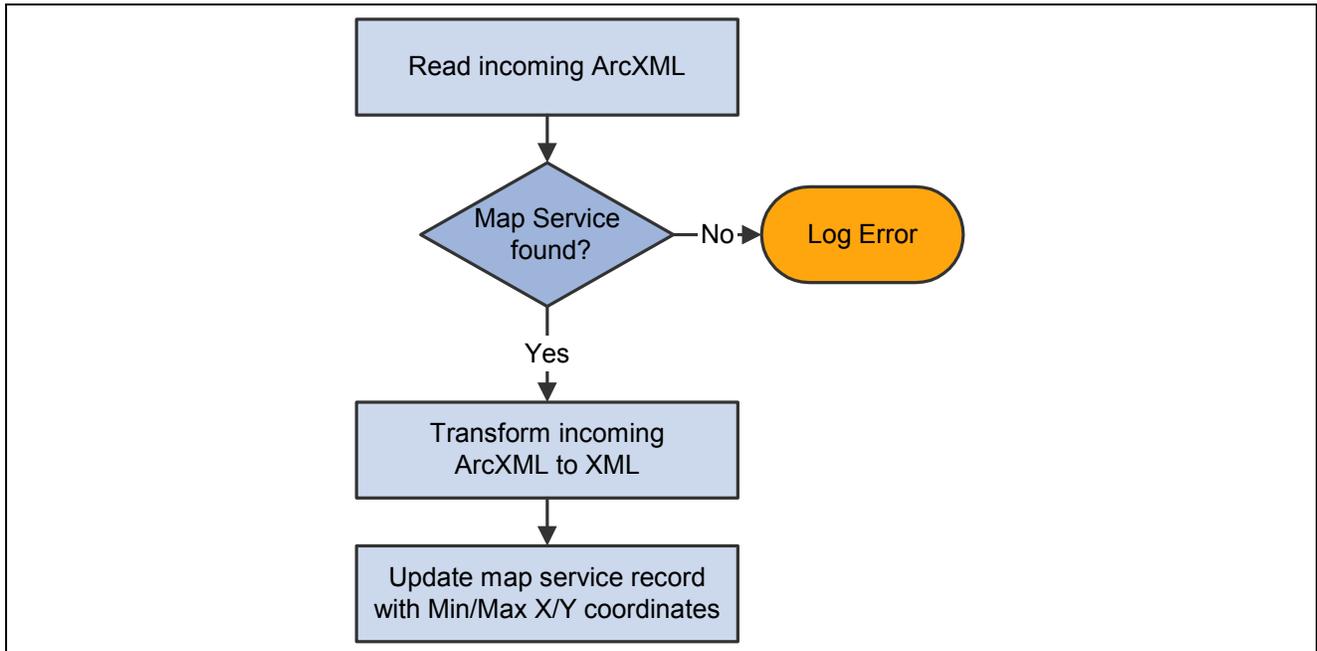
In addition to setting up the map services to which you have subscribed, ESRI defines the minimum and maximum extents to be used when zooming in and out on the Map Dashboard.

You create the map service record in the Map Definition component. The PeopleSoft system transforms the XML to ArcXML and sends the map service information to ESRI. This flowchart illustrates the outbound process flow for map service information:



Request map service information process flow

ESRI sends the map service information and the PeopleSoft system reads the incoming ArcXML. If the map service is found, the PeopleSoft system transforms the ArcXML to XML and updates the map service record with the minimum and maximum extents. The minimum and maximum X and Y coordinates appear on the Map Definition page. This flowchart illustrates the inbound process flow for updating the map service record:



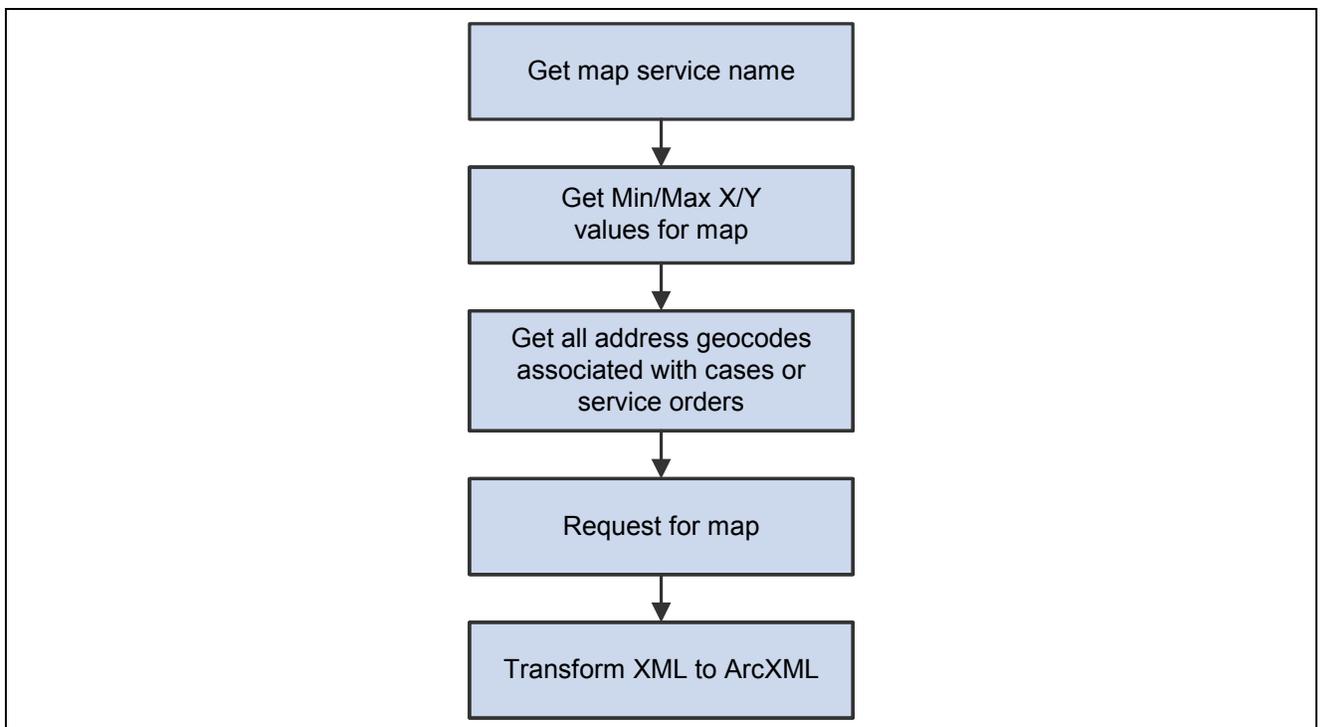
Reply map service information process flow

The RBG_GEO_CODE_US channel is used for the PeopleSoft ESRI integration. This table lists the EIPs for map service information:

| EIP Name | Description | Message Name | Direction of Integration | Technology |
|----------------------------|---|-----------------------|--------------------------|--------------------|
| Request Message Definition | Service map information to obtain map coordinates from ESRI | RBG_MAP_EXT_REQ_MSG | CRM → ESRI | Integration Broker |
| Reply Message Definition | Minimum/Maximum X/Y coordinates of the service map | RBG_MAP_EXT_REPLY_MSG | ESRI → CRM | Integration Broker |

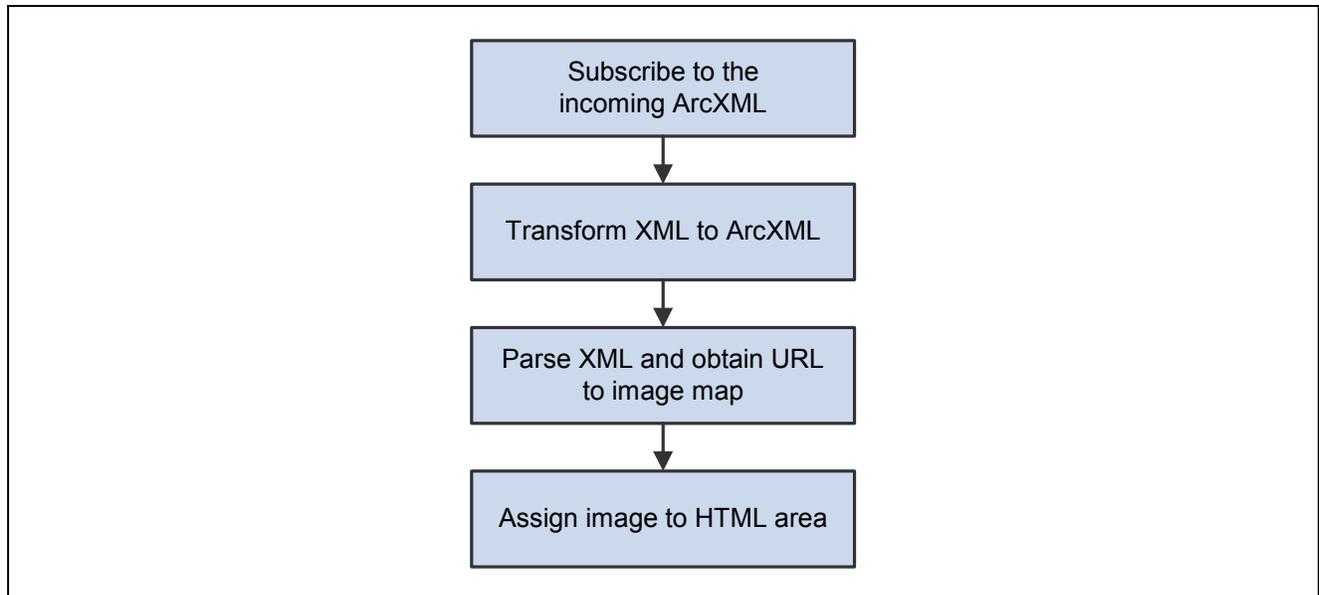
Map Generation

This integration is used to send a list of geocodes from either a case or service order search. A request XML is sent to the ESRI system to generate a map with geocodes that appear as dots. The PeopleSoft system gets the map service name, the minimum and maximum extents for the map, and all address geocodes associated with cases or service orders. It sends the message in ArcXML. This flowchart illustrates the outbound process flow for generating the map:



Request map generation process flow

The ESRI system responds with a URL to the image map based on the map service and geocodes. The map appears on the PeopleSoft page. This graphic illustrates the outbound process flow for generating the map:



Reply map generation process flow

The RBG_GEO_CODE_US channel is used for the PeopleSoft ESRI integration. This table lists the EIPs for map generation:

| EIP Name | Description | Message Name | Direction of Integration | Technology |
|----------------------------|---|-------------------|--------------------------|--------------------|
| Request Message Definition | Service map information and list of geocodes to be displayed on the map | RBG_MAP_REQ_MSG | CRM → ESRI | Integration Broker |
| Reply Message Definition | URL to the generated image map | RBG_MAP_REPLY_MSG | ESRI → CRM | Integration Broker |

Setting Up Integration Broker for ESRI Integration

PeopleSoft CRM uses Integration Broker to send and receive messages for the ESRI integration. Before setting up the integrations for the geocode, map extent, and map integrations, read the *Enterprise PeopleTools PeopleBook: Integration Broker*.

This section does not provide details on Integration Broker; instead, it provides directions for setting up the geocode, map extent, and map integrations.

This section discusses how to:

- Define the ESRI node.
- Define messages.
- Define routings.

- Define connectors.
- Define transformations.
- Define services.
- Define service operations.
- Review routing definitions for service operations.

See Also

Enterprise PeopleTools PeopleBook: Integration Broker

Pages Used to Set Up the ESRI Integration

| Page Name | Object Name | Navigation | Usage |
|------------------------|--------------------|--|--|
| Node Definitions | IB_NODE | PeopleTools, Integration Broker, Integration Setup, Nodes, Node Definitions | Define the ESRI node. |
| Message Definition | IB_MESSAGE_BUILDER | PeopleTools, Integration Broker, Integration Setup, Messages, Message Definition | Define messages for address geocoding, map extents, and maps. |
| Routing Definitions | IB_ROUTINGDEFN | PeopleTools, Integration Broker, Integration Setup, Routings, Routing Definitions | Define routings for address geocoding, map extents, and maps. |
| Connector Properties | IB_ROUTINGDEFNCON | PeopleTools, Integration Broker, Integration Setup, Routings, Connector Properties | Define node connectors for address geocoding, map extents, and maps. |
| Parameters | IB_ROUTINGDEFNDOC | PeopleTools, Integration Broker, Integration Setup, Routings, Parameters | Define node transformations for address geocoding, map extents, and maps. |
| Services | IB_SERVICEDEFN | PeopleTools, Integration Broker, Integration Setup, Services, Services | Define services for address geocoding, map extents, and maps. |
| Find Service Operation | IB_OPERATION | PeopleTools, Integration Broker, Integration Setup, Service Operations, Find Service Operation | Find service operations for address geocoding, map extents, and maps. |
| Routings | IB_SERVICERTNGS | Click the Service Operation link on the Find Service Operation page. Then click Routings. | Review the routing definitions of the service operation. This includes name, version, routing type, sender node, receiver, node, direction, and status |

Defining the ESRI Node

Access the Node Definitions page.

The screenshot shows the 'Node Definitions' page with the following fields and options:

- Node Name:** ESRI
- *Description:** 3rd party - ESRI Node
- *Node Type:** External
- *Authentication Option:** None
- *Default User ID:** VP1
- WSIL URL:** (empty)
- Hub Node:** (empty)
- Master Node:** (empty)
- Company ID:** (empty)
- IB Throttle Threshold:** (empty)
- Image Name:** (empty)
- Code Set Group Name:** (empty)
- External User ID:** (empty)
- External Password:** (empty)

Options and checkboxes:

- Default Local Node
- Local Node
- Active Node
- Non-Repudiation
- Segment Aware

Action buttons: Copy Node, Rename Node, Delete Node

Links: [Contact/Notes](#), [Properties](#)

Node Definitions page

Your ESRI node definition should look similar to the example shown here.

See Also

Enterprise PeopleTools PeopleBook: Integration Broker

Defining Messages

Access the Message Definition page.

Message Definition Schema

Message: RBG_MAP_EXT_REPLY_MSG
Version: VERSION_1
Description: Sync message for Address
Owner ID: Government Base Objects
Comments: Reply message from ESRI with Map Extents

Schema Exists: No
 Part Message

Message Type
 Rowset-based
 Nonrowset-based
 Container

[Service Operation References](#) [Add Record to Root](#)

Left | Right

- [-] RBG_MAP_EXT_REPLY_MSG
 - [+] RBG_MAP_EXT_WRK
 - [+] RBGMAPMAXX_STR
 - [+] RBGMAPMAXY_STR
 - [+] RBGMAPMINX_STR
 - [+] RBGMAPMINY_STR
 - [+] RBGMAPSERVICE

Save Save As

[Return to Search](#) [Add](#) [Update/Display](#)

Message Definition page (RBG messages)

Message Definition Schema

Message: ESRI_ADDRESS_US_MSG
Version: VERSION_1
Alias:
Description: Transformed Request message
Owner ID: Government Base Objects
Comments:

Schema Exists: No
 Part Message

Message Type
 Rowset-based
 Nonrowset-based
 Container

Save Save As

[Return to Search](#) [Add](#) [Update/Display](#)

Message Definition page (ESRI messages)

Note. The system does not display the Service Operation References and Add Record to Root links on the Message Definition pages for ESRI messages. Also, the system does not display links to the message record and message fields on the Message Definition pages for ESRI messages.

These messages are used for the integration:

| Message Name | Description |
|--------------------------|---|
| RBG_MAP_EXT_REPLY_MSG | Reply message from ESRI with map extents. |
| RBG_MAP_EXT_REQ_MSG | Request message from PSFT for map extents. |
| RBG_MAP_REPLY_MSG | Reply message for ESRI with the map. |
| RBG_MAP_REQ_MSG | Request message from PSFT for map. |
| RBG_SYNC_ADDRESS_US_MSG | Request message from PSFT to get the geocode of an address or intersection. |
| RBG_SYNC_GEO_CODE_US_MSG | Reply message from ESRI with the geocode of an address or intersection. |

To re-configure these messages for your business operation, click the link under the Message Name field. The system displays the Message Definition page. Use the fields on the pages to make any necessary changes or add new information.

These messages are used to contain the transformed request or reply messages.

| Message Name | Description |
|------------------------|---|
| ESRI_ADDRESS_US_MSG | Transformed request message to get the geocode of an address or intersection. |
| ESRI_GEO_CODE_US_MSG | Transformed reply message with geocode of an address or intersection. |
| ESRI_MAP_EXT_REPLY_MSG | Transformed reply message from ESRI with map extents. |
| ESRI_MAP_EXT_REQ_MSG | Transformed request message for map extents. |
| ESRI_MAP_REPLY_MSG | Transformed reply message from ESRI with the map. |
| ESRI_MAP_REQ_MSG | Transformed request message for map. |

To re-configure these messages for your business operation, click the link under the Message Name field. The system displays the Message Definition page. Use the fields on the pages to make any necessary changes or add new information.

See Also

Enterprise PeopleTools PeopleBook: Integration Broker

Defining Routings

Access the Routing Definitions page.

The screenshot shows the 'Routing Definitions' page with the following configuration details:

- Routing Name:** MAP_EXTENTS_ROUTING
- *Service Operation:** RBG_MAP_EXT_REQ_MSG
- Version:** VERSION_1
- *Description:** ESRI EXTENT ROUTING
- Comments:** Routing for ESRI Extents
- *Sender Node:** PSFT_CR
- *Receiver Node:** ESRI
- Routing Type:** Synchronous
- Object Owner ID:** Government Base Objects
- *Log Detail:** Header and Detail
- Active**
- System Generated**
- User Exception**

A 'Save' button is located at the bottom left of the form area.

Routing Definitions page

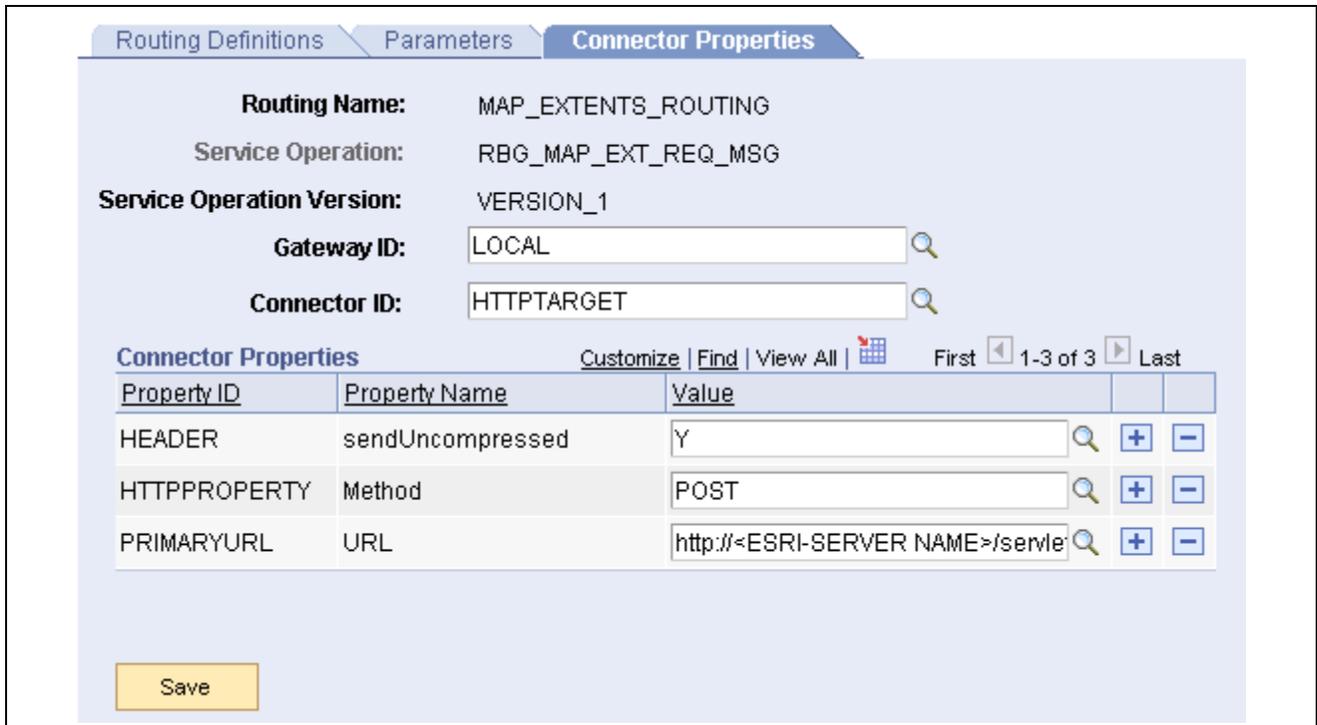
Before you access this page, enter *Map* in the Routing Name field and click Search. These routings appear as search results:

| Routing Name | Description |
|---------------------|--|
| MAP_EXTENTS_ROUTING | Routing for Service Map Extents. |
| MAP_GEOCODE_ROUTING | Routing for geocoding an address or intersection |
| MAP_ROUTING | Routing for getting a Map. |

To re-configure these routings for your business operation, click the link under the Routing Name field. The system displays the Routing Definitions page. Use the fields on the pages to make any necessary changes or add new information.

Defining Connectors

Access the Connector Properties page.



Connector Properties page

Access the Connector Properties page for each of these routings:

| Routing Name | Description |
|---------------------|---------------------------|
| MAP_EXTENTS_ROUTING | Routing for ESRI extents. |
| MAP_GEOCODE_ROUTING | Geocode routing for map. |
| MAP_ROUTING | ESRI routing for map. |

To re-configure the connector properties for these routings, use the fields on the pages to make any necessary changes or add new information.

PRIMARYURL

Use the examples below to enter a URL in the PRIMARYURL field:

- MAP_EXTENTS_ROUTING
*http://<ESRI-SERVER NAME>/servlet
 /com.esri.esrimap.Esrimap?ServiceName=SFBusiness*
- MAP_GEOCODE_ROUTING
*http://<ESRI-SERVER NAME>.peoplesoft.com:7001/servlet
 /com.esri.esrimap.Esrimap?ServiceName=SFBusiness&CustomService=
 Geocode*
- MAP_ROUTING
*http://<ESRI-SERVER NAME>/servlet
 /com.esri.esrimap.Esrimap?ServiceName=SFBusiness*

Note. You must substitute your map service for the *ServiceName* parameter and the name of your server for *<ESRI-SERVER NAME>*.

Defining Transformations

Access the Parameters page.

The screenshot shows the 'Parameters' tab of a configuration interface. At the top, there are three tabs: 'Routing Definitions', 'Parameters', and 'Connector Properties'. Below the tabs, the following information is displayed:

- Routing Name:** MAP_EXTENTS_ROUTING
- Service Operation:** RBG_MAP_EXT_REQ_MSG
- Service Operation Version:** VERSION_1

Below this, a section titled 'Parameters' contains the following fields:

- Type:** Inbound Response
- External Alias:** RBG_MAP_EXT_REQ_MSG.VERSION_1
- Alias References:** (a link)
- Message.Ver into Transform 1:** (empty field with search icon)
- Transform Program 1:** RBG_IEXT_XSL
- Transform Program 2:** (empty field with search icon)
- Message.Ver out of Transforms:** RBG_MAP_EXT_REPLY_MSG.VERSION_1

Parameters page (1 of 2)

The screenshot shows the 'Parameters' tab of a configuration interface for a different routing. It contains the following information:

- Type:** Outbound Request
- External Alias:** RBG_MAP_EXT_REQ_MSG.VERSION_1
- Alias References:** (a link)
- Message.Ver into Transform 1:** (empty field with search icon)
- Transform Program 1:** RBG_OEXT_XSL
- Transform Program 2:** (empty field with search icon)
- Message.Ver out of Transforms:** ESRI_MAP_EXT_REQ_MSG.VERSION_1

At the bottom left of the form, there is a yellow 'Save' button.

Parameters page (2 of 2)

Access the Parameters page for each of these routings:

| Routing Name | Description | Outbound Request Transform Program 1 | Inbound Request Transform Program 1 |
|---------------------|-------------------------------|--------------------------------------|-------------------------------------|
| MAP_EXTENTS_ROUTING | Routing for Map extents. | RBG_OEXT_XSL | RBG_IEXT_XSL |
| MAP_GEOCODE_ROUTING | Routing for Address geocoding | RBG_ADDR_XSL | RBG_GEO_XSL |
| MAP_ROUTING | Routing for Map | RBG_OMAP_XSL | RBG_IMAP_XSL |

To re-configure the transformations for these routings, use the fields on the pages to make any necessary changes or add new information.

Defining Services

Access the Services page.

Services

Service: RBG_MAP_EXT_REQ_MSG

***Description:**

Comments:

Transformed Request message from PSFT fro
Map Extents

Service Alias:

Object Owner ID:

***Namespace:**

[View WSDL](#)

Service Operations

Service Operation:

Operation Type:

Existing Operations

[Customize](#) | [Find](#) | [View All](#) | 1 of 1

| Operation | Message Links | | |
|---|--------------------------------|-------------------------------------|-----------------------|
| <u>Operation.Default Version</u> | <u>Description</u> | <u>Active</u> | <u>Operation Type</u> |
| RBG_MAP_EXT_REQ_MSG.VERSION 1 | Request message for Map Extent | <input checked="" type="checkbox"/> | Synch |

Services page

These services are used for the integration:

| Service | Description |
|-------------------------|---|
| RBG_MAP_EXT_REQ_MSG | Service to get the extents of a Map Service. |
| RBG_MAP_REQ_MSG | Service to get a Map. |
| RBG_SYNC_ADDRESS_US_MSG | Service to get the geocode of an address or intersection. |

To re-configure these services for your business operation, click the link under the Service field. The system displays the Service page. Use the fields on the pages to make any necessary changes or add new information.

Note. You must change the URL in the Namespace field so it coincides with your business for both the RBG and ESRI messages.

Defining Service Operations

Access the Find Service Operation page.

Find Service Operation page

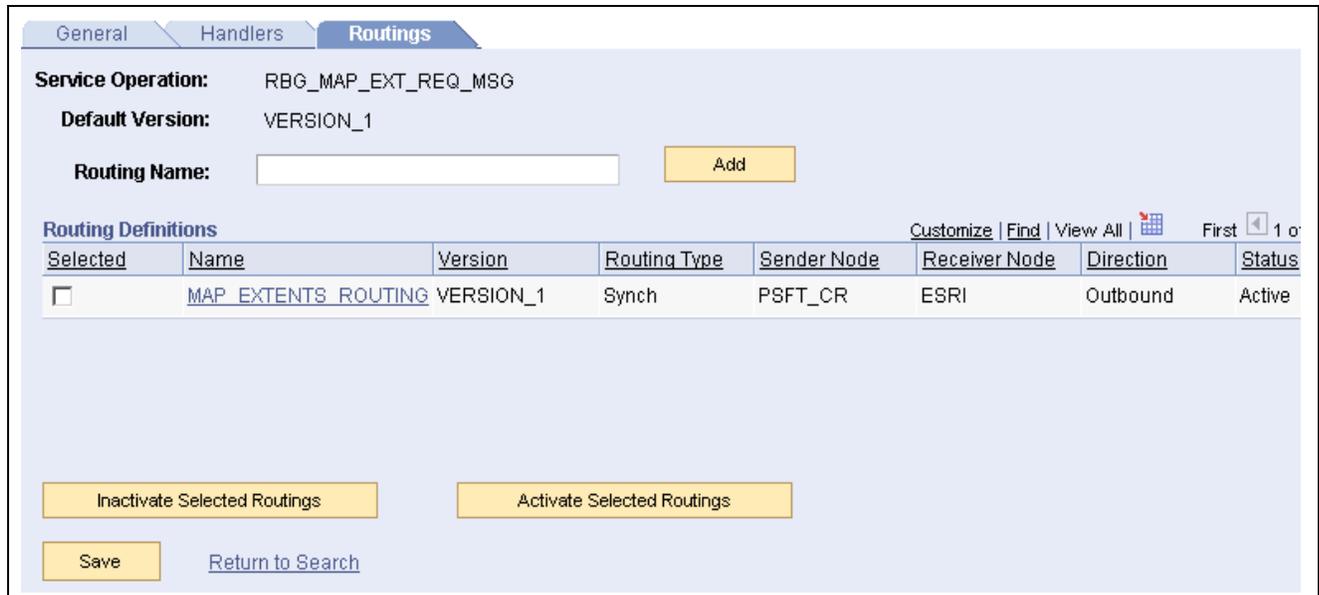
Enter *RBG* in the Service field, and click Search. These services appear as search results:

| Service | Service Operation | Operation Type |
|-------------------------|-------------------------|----------------|
| RBG_MAP_EXT_REQ_MSG | RBG_MAP_EXT_REQ_MSG | Synchronous |
| RBG_MAP_REQ_MSG | RBG_MAP_REQ_MSG | Synchronous |
| RBG_SYNC_ADDRESS_US_MSG | RBG_SYNC_ADDRESS_US_MSG | Synchronous |

Click the link under the Service Operation field and then click the Routings tab to view the routing definitions associated with the service operation.

Reviewing Routing Definitions for Service Operations

Access the Routings page.



Routings page

Setting Up Integration Flags

Three integration flags must be selected for the ESRI integration to work effectively. To implement ESRI, select integration flags for the geocode, map extent, and map integrations.

This section discusses how to:

- Select the geocode integration flag.
- Select the map extent and map integration flags.

Pages Used to Set Up Integration Flags

| Page Name | Object Name | Navigation | Usage |
|----------------------|-----------------|--|--|
| Installation Options | RB_INSTALLATION | Set Up CRM, Install, Installation Options, General Options, Installation Options | Select the flag for geocode integration. |
| Map Services | RBG_MAP_HDR_PG | Set Up CRM, Common Definitions, Integration Rules, Map Services, Map Services | Select the flags for map extent and map integration. |

Selecting the Geocode Integration Flag

Access the Installation Options - General Options page.

General Options

Country United States

Exchange Rate Type Current Rate

Market

Agreement Renewal Lead Time Days

Collector/Credit Analyst Req.

Geo Code Integration

NLP Framework

360-Degree Search Context

Installation Options - General Options page

Select the Geo Code Integration check box.

Note. After you save the page, you must clear the cache and reboot the application server.

Selecting the Map Extent and Map Integration Flags

Access the Map Services page.

Map Services Query Definition

Vendor Information

Market Enable Map Extent Integration

GIS Vendor Name Enable Map Integration

Description

Services Find | View All First 1 of 1 Last

Map Service Active Map Service

Description

Request Message Default Map Service

| | | | |
|---------------|-------------------------------|---------------|-----------------------------|
| Map Minimum X | -122.513400000000000000000000 | Map Minimum Y | 37.708200000000000000000000 |
| Map Maximum X | -122.3031392857140000000000 | Map Maximum Y | 37.832500000000000000000000 |

Modified 04/09/2004 9:39AM PDT GOVADMIN

Map Services page

Select the Enable Map Extent Integration and Enable Map Integration check boxes.

Setting Up ESRI Integration

To set up ESRI Integration, use the Map Setup (RBG_MAP_SETUP) component.

You must define the ESRI map services to which you subscribe. You can define one or more map services to be used in PeopleSoft CRM. The map services that you define appear as options on the case and service order components. On the Query Definition page, you define the components that support map-related queries.

This section discusses how to:

- Set up map services.
- Set up query definition.

Pages Used to Set Up ESRI Integration

| Page Name | Object Name | Navigation | Usage |
|------------------|----------------|---|---|
| Map Services | RBG_MAP_HDR_PG | Set Up CRM, Common Definitions, Integration Rules, Map Services, Map Services | Define the GIS vendor and the map services that you are using. |
| Query Definition | RBG_MAP_QRY_PG | Set Up CRM, Common Definitions, Integration Rules, Map Services, Query Definition | Define the components used for map-related queries. As delivered, map-related queries are enabled for case and service order. |

Setting Up Map Services

Access the Map Services page.

Note. The previous section includes an example of the Map Services page.

| | |
|---|--|
| Market | Displays market defaults from the search page. |
| GIS Vendor Name (geographical information system vendor name) | Enter the name of the GIS vendor. |
| Description | Enter a description of the service defined on this page. |
| Enable Map Extent Integration | Select to enable map extent integration. Map extent information determines the boundaries for zooms and pans. You must select this check box to enable the Get Map Service Extents button in the Services group box. |
| Enable Map Integration | Select to enable the publishing of maps to the PeopleSoft CRM system. |
| Services | |
| Map Service | Enter each map service that is to be used. The user can select the appropriate map service from the Map Dashboard search. Map services are set up on the ESRI site. |
| Description | Enter a description of the map service. |

- Request Message** Enter the message to be sent to ESRI to request the service.
- Active Map Service** Select to make the map service active.
- Default Map Service** Select to use the map service as the default.
- Get Map Service Extents** Click to get the extents for the map service that you are defining. This sends a request to ESRI for the map service extent data and populates the map extent information on the page. The Get Map Service Extents button only works if you have selected Enable Map Extent Integration.
- Map Minimum X** (minimum X coordinate),
Map Maximum X (maximum X coordinate),
Map Minimum Y (minimum Y coordinate),
 and **Map Maximum Y** (maximum Y coordinate)

Setting Up Query Definition

Access the Query Definition page.

Query Definition page

- Query Name** Enter a name for the query. The query name is selected on the Map Dashboard search page.
- Component Interface Name** Enter the component interface that provides access to the component.
- Component Name** Enter the name of the component on which you want to perform the query. PeopleSoft CRM is delivered set up to query on cases and service orders.

| | |
|----------------------|--|
| Base Record | Enter the name of the base record for the component. |
| Active Query | Select to enable the query definition. |
| Default Query | Select to use this query as the default. |

Copy Fields

In the Copy Fields group box, define the fields that you want to appear in the case or service order-related information grid that appears under the map on the Map Dashboard page. For example, in a service order-related query, you may want to display the business unit, service order ID, consumer name, city, postal code, state, service order status, and service order priority. Each of these rows corresponds to a point shown on the map.

| | |
|--------------------|---|
| From Record | Select the record name from which to retrieve the data. |
| From Field | Select the field name from which to retrieve the data. |
| To Record | Select the record name in the destination table. |
| To Field | Select the field name in the destination table. |
| Active | Select to enable the copying of the specified fields. |

Accessing the Map Dashboard

Using the Map Dashboard search page, you can create customized searches to display the data. You can access the Map Dashboard search page from the agent view, navigation bar, Case page, or Service Order page.

This section discusses how to access the Map Dashboard.

Pages Used to Access the Map Dashboard

| Page Name | Object Name | Navigation | Usage |
|-----------------------|-----------------|--|---|
| Map Dashboard - Query | RBG_VIEW_MAP_PG | From the left navigation, click the Map Dashboard link on the menu. | Define the criteria for the search. You can search on one or more fields to define the results. |
| Map Dashboard - Map | RBG_VIEW_MAP_PG | <ul style="list-style-type: none"> On the Case page, click the Map Dashboard button on the toolbar. On the Service Order page, click the Map Dashboard link. | Click the button on the Case page or the link on the Service Order page to go directly to the Map Dashboard. The system carries forward all of the values that you defined in the Query Definition setup. |

Accessing the Map Dashboard

Access the Map Dashboard - Query page.

Map Dashboard

Query

*Search CASE

Map Service SFBusiness

Map Dashboard - Query page (1 of 2)

Search

Use Saved Search

Map It Clear Save Search Criteria Delete Saved Search Personalize Search

Business Unit =

Case ID =

Customer Name =

Contact Name =

Date Created =

Problem Summary begins with

Case Status =

Case Type =

Case Priority =

Category =

Specialty Type =

Detail =

City begins with

State begins with

Postal Code begins with

Country =

Map It Clear Save Search Criteria Delete Saved Search Personalize Search

Map Dashboard - Query page (2 of 2)

Note. Users must specify a business unit, setID, and market on the Overall Preferences page under Set Up CRM, Security, User Preferences in order to access the map dashboard.

- Search** Select *Case* or *Service Order*.
- Map Service** The map service appears by default to the map that you defined on the Map Definition page. You can select from a list of available map services. The map services are configured on the ESRI site.
- Use Saved Search** Select a saved search from the list.
- Map It** Click the Map It button to submit the search and generate the map.
- Save Search Criteria** Click the link to save the search criteria.
- Personalize Search** Click the link to display a list of search fields. You can select the fields that will appear on the search page.

Viewing the Map Dashboard

The Map Dashboard presents a graphical and tabular representation of the search results.

This section discusses how to:

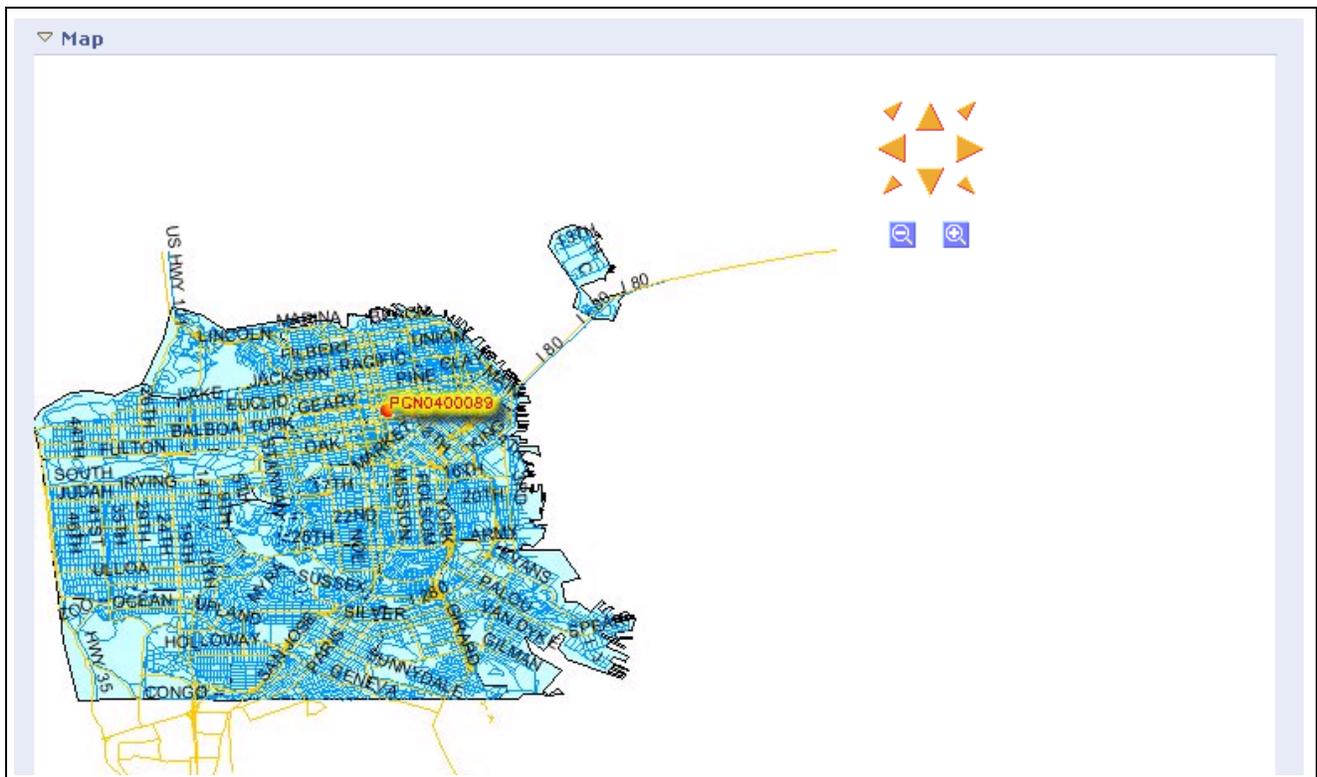
- View the Map Dashboard.
- View case-related information on the Map Dashboard.
- View service order-related information on the Map Dashboard.

Pages Used to View the Map Dashboard

| Page Name | Object Name | Navigation | Usage |
|---------------------|-----------------|---|---|
| Map Dashboard - Map | RBG_VIEW_MAP_PG | Click Map It on the Map Dashboard - Query page. | Use this page to view the map and tabular data generated by the search. |

Viewing the Map Dashboard

Access the Map Dashboard - Map page.



Map Dashboard - Map page

Use the directional arrows and zoom in and zoom out buttons to navigate to the areas on the map that you want to view.

Viewing Case-Related Information on the Map Dashboard

Access the Map Dashboard - Cases page.

| Business Unit | Case ID | Customer Name | Problem Summary | City | State | Postal Code |
|---------------|------------------------|-------------------------|-----------------|---------------|-------|-------------|
| EGNBU | 220436 | Government Self-Service | Animal | San Francisco | CA | 94104 |

Map Dashboard - Cases page

The Cases grid displays details of the case-related information that appears on the map. Click the Case ID link to navigate to the case details.

Viewing Service Order-Related Information on the Map Dashboard

Access the Map Dashboard - Service Orders page.

| Business Unit | Service Order ID | Case ID | Customer Name | City | Postal Code | State |
|---------------|----------------------------|---------|---------------|---------------|-------------|-------|
| EGNBU | PCN0400089 | 220352 | Mark Drury | San Francisco | 94109 | CA |

Map Dashboard - Service Orders page

The Service Orders grid displays details of the service order-related information that appears on the map. Click the Service Order ID link to navigate to the service order details.

Viewing Geocode Errors

If the ESRI system cannot return a valid geocode for the address that is published, the system create an error log. This section discusses how to view geocode errors.

Page Used to View Geocode Errors

| Page Name | Object Name | Navigation | Usage |
|-------------------|-------------------|---|---|
| Geocode Error Log | CM_GEO_ERR_LOG_PG | Customers CRM, Geocode Error Log, Geocode Error Log | View addresses that do not generate valid geocodes. |

Viewing Geocode Errors

Access the Geocode Error Log page.

Geocode Error Log

Error Log

| | | | |
|-----------------------|--------------------------------|-------------------|---------------|
| CM ID | 180685798381019433839291052566 | Status | |
| Address Type | Address | City | San Francisco |
| Address Line 1 | 1600 California Street | State | CA |
| Address Line 2 | | Country | USA |
| Date Created | 03/18/04 1:49PM | Created By | GOVGUEST |
| Description | | | |
| Modified | 03/18/2004 1:49PM PST | GOVGUEST | |

[Return to Search](#) [Next in List](#) [Previous in List](#)

Geocode Error Log page

This page displays addresses that do not generate valid geocodes.

APPENDIX A

PeopleSoft CRM Solution Management Reports

This appendix provides an overview of PeopleSoft CRM Solution Management reports and enables you to view a summary table of all reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files that are published on CD-ROM with the documentation.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

PeopleSoft CRM Solution Management Reports: A to Z

This table lists the two solution management reports that are shared by PeopleSoft Support, PeopleSoft HelpDesk, and PeopleSoft Integrated FieldService.

Solutions Usage

| Report ID and Report Name | Description | Navigation | Run Control Page |
|---------------------------|--|--|------------------|
| RCC2012 Solution Usage | This report lists solutions that were used in cases created during the specified date range. For each solution, the report shows the solution usage count, solved count, and success rate. | Solutions, Reports, Solutions Usage, Solutions Usage | RUN_RCC2012 |

Top Ten Solutions By Product

| Report ID and Report Name | Description | Navigation | Run Control Page |
|---|--|--|------------------|
| RCC2014 Top Ten Solutions By Product | For each included product, this report lists the ten solutions that most often resolved cases that were created during the specified date range. For each solution, the report shows the number of cases solved for that product. | Solutions, Reports, Top Ten Solutions By Product, Top Ten Solutions By Product | RUN_RCC2014 |

Glossary of PeopleSoft Enterprise Terms

| | |
|------------------------------|---|
| absence entitlement | This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period. |
| absence take | This element defines the conditions that must be met before a payee is entitled to take paid time off. |
| academic career | In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on). |
| academic institution | In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes. |
| academic organization | In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division. |
| academic plan | In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career. |
| academic program | In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates. |
| accounting class | In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs. |
| accounting date | The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date. |
| accounting split | The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields. |
| accumulator | You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated. |
| action reason | The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Enterprise Human Resources, PeopleSoft Enterprise Benefits |

| | |
|--------------------------------|--|
| | Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process. |
| action template | In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition. |
| activity | <p>In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.</p> |
| address usage | In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address. |
| adjustment calendar | In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount. |
| administrative function | In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area. |
| admit type | In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications. |
| agreement | In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination. |
| allocation rule | In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules. |
| alternate account | A feature in PeopleSoft Enterprise General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments. |
| analysis database | In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered |

for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

| | |
|-------------------------------|---|
| Application Messaging | PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to. |
| AR specialist | Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items. |
| arbitration plan | In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced. |
| assessment rule | In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action. |
| asset class | An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification. |
| attribute/value pair | In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree. |
| audience | In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences. |
| authentication server | A server that is set up to verify users of the system. |
| base time period | In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar. |
| benchmark job | In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources. |
| billing career | In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers. |
| bio bit or bio brief | In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports. |
| book | In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets. |
| branch | A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager. |
| budgetary account only | An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account." |
| budget check | In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning. |
| budget control | In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. |

For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

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| budget period | The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar. |
| business activity | The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process. |
| business event | In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example). |
| business process | A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i> . |
| business task | The name of the specific function depicted in one of the business processes. |
| business unit | A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions. |
| buyer | In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system. |
| campus | In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career. |
| catalog item | In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities. |
| catalog map | In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog. |
| catalog partner | In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content. |
| categorization | Associates partner offerings with catalog offerings and groups them into enterprise catalog categories. |
| category | In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions. |
| channel | In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event. |
| ChartField | A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth. |

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| ChartField balancing | You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction. |
| ChartField combination edit | The process of editing journal lines for valid ChartField combinations based on user-defined rules. |
| ChartKey | One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination. |
| checkbook | In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions. |
| checklist code | In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page. |
| class | In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> . |
| Class ChartField | A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> . |
| clearance | In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period. |
| clone | In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change. |
| cohort | In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> . |
| collection | To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object. |
| collection rule | In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances. |
| comm key | See <i>communication key</i> . |
| communication key | In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users. |

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| compensation object | In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation. |
| compensation structure | In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects. |
| component interface | A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client. |
| condition | In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due. |
| configuration parameter catalog | Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server. |
| configuration plan | In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions. |
| constituents | In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE). |
| content reference | Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets. |
| context | In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level. |
| control table | Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data. |
| cost-plus contract line | A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines. |
| cost profile | A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book. |
| cost row | A cost transaction and amount for a set of ChartFields. |
| course | In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and |

credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

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| course share set | In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement. |
| current learning | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs. |
| data acquisition | In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS). |
| data cube | In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager. |
| data elements | Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups. |
| dataset | A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles. |
| delivery method | In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules. |
| delivery method type | In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components. |
| detailed business process | A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management. |
| dimension | In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager. |
| directory information tree | In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure. |

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| division | In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i> . |
| document sequencing | A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity. |
| dynamic detail tree | A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user. |
| edit table | A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system. |
| effective date | A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date. |
| EIM ledger | Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result. |
| elimination set | In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations. |
| entry event | In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries. |
| equitization | In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations. |
| equity item limit | In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally. |
| event | A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility. |
| event propagation process | In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit. |
| exception | In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute. |

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| exclusive pricing | In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions. |
| fact | In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table. |
| financial aid term | In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career. |
| forecast item | A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage. |
| fund | In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual. |
| gap | In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded. |
| generic process type | In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report. |
| gift table | In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal. |
| GL business unit | Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> . |
| GL entry template | Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash. |
| GL Interface process | Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run. |
| group | In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to |

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| | run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes. |
| incentive object | In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects. |
| incentive rule | In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation. |
| incur | In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities. |
| initiative | In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives. |
| inquiry access | In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> . |
| institution | In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes. |
| integration | A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software. |
| integration point | An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application. |
| integration set | A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped. |
| item | In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. |
| | In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment. |
| item shuffle | In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment. |

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| joint communication | In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database. |
| keyword | In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box. |
| KPI | An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined. |
| LDIF file | Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise data and directory data. |
| learner group | In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office. |
| learning components | In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity. |
| learning environment | In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them. |
| learning history | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs. |
| ledger mapping | You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table. |
| library section | In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it. |
| linked section | In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section. |
| linked variable | In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable. |
| LMS | Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a |

common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

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| load | In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment. |
| local functionality | In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu. |
| location | Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address. |
| logistical task | In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider. |
| market template | In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category. |
| mass change | In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> . |
| match group | In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values. |
| MCF server | Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration. |
| merchandising activity | In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic. |
| meta-SQL | Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the <i>SQLExec</i> function, and PeopleSoft Application Engine programs. |
| metastring | Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform. |
| multibook | In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single |

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

a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

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

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

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

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

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

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

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

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

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

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