

PeopleSoft®

PeopleSoft CRM 8.8 SP1 Mobile Applications PeopleBook

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About These PeopleBooks

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

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

PeopleSoft 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 applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. 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 applications most effectively.

PeopleSoft Application Fundamentals

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

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. 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 this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode 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 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 number <i>0</i> , not 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 W.
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.

Typographical Convention or Visual Cue	Description
... (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 ().
[] (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>
(ISO)	<p>Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses.</p> <p>The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example:</p> <p>(GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.</p>
Cross-references	PeopleBooks provide cross-references either below the heading "See Also" or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

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 system.

Note. Example of a note.

A note that is preceded by *Important!* 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.

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 PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These 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	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. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.

Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	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.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft CRM Mobile Applications Preface

This preface discusses:

- PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook.
- PeopleSoft CRM 8.8 SP1 Automation and Configuration Tools PeopleBook.
- PeopleSoft CRM 8.8 SP1 Services Foundation PeopleBook.
- PeopleTools PeopleBook.

Note. All information found in this PeopleBook is applicable to PeopleSoft CRM Mobile Applications.

PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook

The *PeopleSoft CRM 8.8 SP1 Mobile Applications PeopleBook* provides implementation and processing information for your PeopleSoft CRM mobile applications. However, additional essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the CRM product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire PeopleSoft CRM system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook

PeopleSoft CRM 8.8 SP1 Automation and Configuration Tools PeopleBook

The *PeopleSoft CRM 8.8 SP1 Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to your application PeopleBook.

There are three parts to the *PeopleSoft CRM 8.8 SP1 Automation and Configuration Tools PeopleBook*:

- Correspondence management.

This part discusses manual notifications and correspondence requests.

- Automation tools.

This part discusses PeopleSoft CRM workflow, component event processing, business projects, and scripts.

- Configuration tools.

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

PeopleSoft CRM 8.8 SP1 Services Foundation PeopleBook

The *PeopleSoft CRM 8.8 SP1 Services Foundation PeopleBook* discusses configuration options that are common to PeopleSoft FieldService and the PeopleSoft call center applications (PeopleSoft Support, HelpDesk, and HelpDesk for Human Resources).

There are four parts to the *PeopleSoft CRM 8.8 SP1 Services Foundation PeopleBook*:

- Entitlement management.

Entitlement management enables users to manage agreements and warranties.

- Solution management.

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

- Time management.

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

- Environmental Systems Research Institute (ESRI) integration.

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

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the PeopleTools 8.42 PeopleBooks.

PART 1

Getting Started with PeopleSoft CRM Mobile Applications

Chapter 1

Getting Started with PeopleSoft CRM Mobile Applications

CHAPTER 1

Getting Started with PeopleSoft CRM Mobile Applications

This PeopleBook describes four PeopleSoft CRM (PeopleSoft Customer Relationship Management) mobile applications: PeopleSoft Mobile Order Capture, PeopleSoft Mobile Sales for WAP Phones, PeopleSoft Mobile Sales, and PeopleSoft Mobile FieldService.

This chapter provides an overview of PeopleSoft mobile applications and discusses:

- PeopleSoft CRM mobile business process.
- Implementing PeopleSoft CRM mobile applications.

Understanding PeopleSoft CRM Mobile Applications

PeopleSoft Mobile applications utilize the power of PeopleSoft CRM and provide mobile functionality to meet your business needs in the area of order capture, sales, and field service.

Through the PeopleSoft Mobile Agent, you can download information from the database server to the mobile device. When used with a WAP-enabled device, mobile sales professionals can access customer information from the PeopleSoft CRM Sales database and display it on their WAP-enabled devices.

Note. This book focuses on the setup and usage of mobile functionality and does not discuss core CRM setup or usage. It is highly recommended that you review the references that are provided in each chapter before beginning your implementation.

PeopleSoft CRM Mobile Business Processes

This section discusses the business processes that you can perform using PeopleSoft CRM mobile applications. We discuss these business processes in the following business process chapters in this PeopleBook:

- PeopleSoft Mobile Order Capture.
- PeopleSoft Mobile Sales.
- PeopleSoft Mobile FieldService.

Implementing PeopleSoft CRM Mobile Applications

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

Implementing CRM Cross-Product Functionality

This section discusses the high-level steps to implement cross-product functionality. For more detailed steps, refer to the getting started chapter in the *PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook*.

See

See *PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook*, Getting Started with PeopleSoft Customer Relationship Management Applications.

Step	Reference
1. Set up PeopleSoft CRM global application tables.	PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook, Getting Started with PeopleSoft Customer Relationship Management Applications, Setting Up PeopleSoft CRM Global Application Tables
2. Define customers and workers.	PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook, Getting Started with PeopleSoft Customer Relationship Management Applications, Setting Up Customers and Workers
3. Set up the customer 360-Degree View.	PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook, Getting Started with PeopleSoft Customer Relationship Management Applications, Setting Up the Customer 360-Degree View
4. Set up core customer self-service.	PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook, Getting Started with PeopleSoft Customer Relationship Management Applications, Setting Up Customer Self-Service
5. Define products and items.	PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook, Getting Started with PeopleSoft Customer Relationship Management Applications, Setting Up Products and Items
6. Set up integrations.	PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook, Getting Started with PeopleSoft Customer Relationship Management Applications, Setting Up Integrations
7. Set up PeopleSoft common components.	PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook, Getting Started with PeopleSoft Customer Relationship Management Applications, Setting Up PeopleSoft Common Components
8. Set up ESRI.	PeopleSoft CRM 8.8 SP1 Services Foundation PeopleBook, ESRI Integration

Setting Up General Mobile Options

This section discusses the implementation steps for setting up general mobile options.

Step	Reference
1. Set up dataset rules.	<i>PeopleTools PeopleBook: PeopleSoft Enterprise Components</i>
2. Set up user roles.	<i>PeopleTools PeopleBook: PeopleSoft Enterprise Components</i>

Setting Up PeopleSoft Mobile Sales for WAP Phones

This section discusses the implementation steps for setting up mobile sales for WAP phones.

Step	Reference
1. Set up the wireless device that supports WAP capabilities.	Chapter 8 , Understanding PeopleSoft Mobile Sales for WAP Phones, Implementation Requirements, page 68
2. Modify permission lists.	Chapter 9 , Setting Up PeopleSoft Mobile Sales for WAP Phones, Modifying Permission Lists, page 73

Setting Up Mobile CDM Transactions

This section discusses the implementation steps for setting up Customer Data Model transactions.

Step	Reference
1. Define mobile customer options.	Chapter 3 , Setting Up Mobile CDM Transactions, Page Used to Define Mobile Customer Options, page 15
2. Set up out of date detection.	Chapter 3 , Setting Up Mobile CDM Transactions, Setting Up Out-of-Date Detection, page 18

Setting Up PeopleSoft Mobile Order Capture

This section discusses the implementation steps for setting up mobile order capture.

Step	Reference
1. Set up mobile product defaults.	Chapter 4 , Working with Customer and Product Information on a Mobile Device, Setting Up Mobile Product Defaults, page 29
2. Set up mobile order capture options.	Chapter 1 , Getting Started with PeopleSoft CRM Mobile Applications, Setting Up PeopleSoft Mobile Order Capture, page 5

Setting Up PeopleSoft Mobile Sales

This section discusses the implementation steps for setting up mobile sales.

Step	Reference
1. Set up mobile product options.	Chapter 4, Working with Customer and Product Information on a Mobile Device, Setting Up Mobile Product Options, page 29
2. Set up mobile sales options.	Chapter 1, Getting Started with PeopleSoft CRM Mobile Applications, Setting Up PeopleSoft Mobile Sales, page 5

Automating and Configuring CRM Mobile Applications

This section discusses the high-level steps to further automate and configure your application. For more detailed steps, refer to the Getting Started chapter in the *PeopleSoft CRM 8.8 SP1 Automation and Configuration Tools PeopleBook*.

See *PeopleSoft CRM 8.8 SP1 Automation and Configuration Tools PeopleBook*, Getting Started with PeopleSoft CRM Automation and Application Configuration Tools.

Step	Reference
1. Define correspondence management.	<ul style="list-style-type: none"> • PeopleSoft CRM 8.8 SP1 Automation and Configuration Tools PeopleBook, Defining General Settings for Correspondence • PeopleSoft CRM 8.8 SP1 Automation and Configuration Tools PeopleBook, Defining Settings for Template-Based Correspondence • PeopleSoft CRM 8.8 SP1 Automation and Configuration Tools PeopleBook, Setting Up Correspondence Templates
2. Define workflow actions and workflow email templates.	PeopleSoft CRM 8.8 SP1 Automation and Configuration Tools PeopleBook, Setting Up PeopleSoft CRM Workflow
3. Define business projects.	PeopleSoft CRM 8.8 SP1 Automation and Configuration Tools PeopleBook, Setting Up Business Projects
4. Define scripts.	PeopleSoft CRM 8.8 SP1 Automation and Configuration Tools PeopleBook, Defining Scripts
5. Define component event processing.	PeopleSoft CRM 8.8 SP1 Automation and Configuration Tools PeopleBook, Setting Up Component Event Processing
6. (Optional) Configure search pages.	PeopleSoft CRM 8.8 SP1 Automation and Configuration Tools PeopleBook, Configuring Search Pages
7. (Optional) Configure toolbars.	PeopleSoft CRM 8.8 SP1 Automation and Configuration Tools PeopleBook, Configuring Toolbars
8. (Optional) Configure attributes.	PeopleSoft CRM 8.8 SP1 Automation and Configuration Tools PeopleBook, Configuring Attributes
9. (Optional) Configure industry-specific field labels and translate values.	PeopleSoft CRM 8.8 SP1 Automation and Configuration Tools PeopleBook, Configuring Field Labels and Field Values

PART 2

Disconnected PeopleSoft CRM Mobile Applications

Chapter 2
Working with CRM Mobile Applications

Chapter 3
Setting Up Mobile CDM Transactions

Chapter 4
Working with Customer and Product Information on a Mobile Device

Chapter 5
Using PeopleSoft Mobile Order Capture

Chapter 6
Using PeopleSoft Mobile Sales

Chapter 7
Using PeopleSoft Mobile FieldService

CHAPTER 2

Working with CRM Mobile Applications

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

- Initialize a mobile device.
- Perform synchronizations.
- View errors and notifications.

Understanding Mobile Device Initialization

Before you can initialize and begin using your PeopleSoft CRM (PeopleSoft Customer Relationship Management) mobile application, PeopleSoft Mobile Agent must be installed on your mobile device. This installation is described in the *PeopleTools Mobile Agent PeopleBook* referenced above.

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

Note. Instance data is synonymous with business data, and metadata is synonymous with application metadata.

See Also

PeopleTools PeopleBook: PeopleTools Mobile Agent

Initializing a Mobile Device

Initializing a mobile device first requires a bootstrap synchronization. The steps required for a bootstrap synchronization are as follows:

1. Install the PeopleSoft Mobile Agent software to the device.
2. Perform a bootstrap synchronization.
 - a. Verify that the PSMOBILE.INI file in your WINNT folder, identifies the server you will use to transfer PeopleSoft Mobile Sales data between the server and the remote device when you launch the application. This URL should be identified in the SyncGateway parameter. (For example, SyncGateway=http://psuser110200/SyncServer).

- b. Launch the PeopleSoft Mobile Agent by selecting Start, Programs, PeopleSoft Mobile Agent, Start PeopleSoft Mobile Agent. If PeopleSoft Mobile Agent is already running on the local machine, you can stop the application, by selecting Start, Programs, PeopleSoft Mobile Agent, Stop PS Mobile Agent.
- c. From the Start menu of your computer, select Start, Programs, PeopleSoft Mobile Agent, PS Mobile Application. If the device has not previously been initialized, the PeopleSoft Mobile Device Bootstrap page appears.
- d. Sign in to the application with your User ID and Password.

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

- e. Click *Synchronize*.

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

When complete, check for alerts or notifications.

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

Understanding Synchronization Options

After device initialization, you have three synchronization options:

- Upload Changes
- Full Synchronization
- Update Applications

Perform synchronization with your mobile device connected and logged on to your company network server. You can be connected directly to your local area network, through dial-up or through the internet.

See Also

PeopleTools PeopleBook: PeopleTools Mobile Agent

Performing Synchronization

This section discusses the synchronization options, and how to perform each one.

Performing an Upload Changes Synchronization

Upload Changes enables a quick update of changes from your mobile device to the server. Data that is received from the server is limited to error responses to your update requests, and any server-side changes that are made to objects that you updated. To receive updates to all of your data, select Full Synchronization.

To perform an Upload Changes synchronization:

1. From the PeopleSoft Mobile menu, select Synchronization, Upload Changes.

The Upload Changes page appears

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

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

4. When it's complete, check for synchronization errors and notifications.

Performing a Full Synchronization

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

To perform a Full synchronization:

1. From the PeopleSoft Mobile menu, select Synchronization, Full Synchronization.

The Full Synchronization page appears

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

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

4. When it's complete, check for synchronization errors and notifications.

Performing an Update Applications Synchronization

Update Applications first attempts to upload all changes from your device. If any errors occur during this upload, Update Applications terminates. Resolve all errors prior to performing Update Applications again. If the upload is successful, Update Applications removes all data from your device and retrieves the current version of your business applications. If your applications load successfully, a full synchronization is performed to load business data onto your device. Update Applications is irreversible.

To perform an Update Applications synchronization:

1. From the PeopleSoft Mobile menu, select Synchronization, Update Applications.

The Update Applications page appears

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

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

4. When it's complete, check for synchronization errors and notifications.

Viewing Errors and Notifications

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

To view errors:

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

You can try synchronizing again.

To view notifications:

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

See Also

PeopleTools PeopleBook: PeopleTools Mobile Agent

Reviewing and Correcting Synchronization Errors

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

- If the error is related to a system problem, such as an invalid password or the Sync Server being available, attempt the synchronization again.
- If the error is related to a conflict with a server-side change (after evaluation by the conflict resolution rules that are defined for the application), delete the error or change and accept the new data.
- If the error is related to a business rule violation, the text of the message should contain enough information for the user to identify the changes that are required. Correct the errors and then attempt the synchronization again.

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

See Also

PeopleTools PeopleBook: PeopleTools Mobile Agent

CHAPTER 3

Setting Up Mobile CDM Transactions

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

- Define mobile customer options.
- Set up out-of-date detection.

Understanding Data Distribution

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

Data distribution for mobile applications:

- Implements security.
- Filters the data that is downloaded to the mobile device.

Depending on the business objects, PeopleSoft Customer Relationship Management (PeopleSoft CRM) mobile applications utilize the distribution rules and spider out methods to distribute data from the database to the mobile device.

Distribution Rules

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

Spider Out

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

Objects	Data Distribution Method
Company (RDM_Company_2)	Data Distribution Rules
Contact (RDM_Contact_2)	<ul style="list-style-type: none"> • Data Distribution Rules. • Spider Out From Company and Consumer.
Site (RDM_Site_2)	<ul style="list-style-type: none"> • Data Distribution Rules. • Spider Out From Company and Consumer.
Consumer (RDM_Consumer_2)	Data Distribution Rules.

Relationship Component (BO_REL_MOBILE)

The Relationship component sources the data in the various components' relationship viewers.

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

See Also

PeopleTools PeopleBook: PeopleSoft Enterprise Components

PeopleTools PeopleBook: PeopleTools Mobile Agent

PeopleTools PeopleBook: PeopleCode Reference

Defining Mobile Customer Options

In PeopleSoft CRM, you can perform each of the following for PeopleSoft Mobile applications:

- Define customer options.
- Define rules for attachments

I

Page Used to Define Mobile Customer Options

Page Name	Object Name	Navigation	Usage
Mobile Customer Options	RDM_MOBILE_DFLT	Set Up CRM, Install, Mobile, Mobile Customer Options	Define the data distribution methods that are used to display the Relationship Viewer and the 360 Degree View on mobile devices.
Attachment	RSF_SYNC_ATTACH	Set Up CRM, Business Unit Related, Mobile Rules	Define mobile sales attachment rules.

Defining Mobile Customer Options

Access the Mobile Customer Options page.

Mobile Customer Options

Mobile Customer Options:

***Description:**

Default SetID:

Default Country:

Show Relationship Viewer

Spider Out To Customer

Show 360 Degree View

Spider Out For 360 View

Address Purpose Type: **Pager Purpose Type:**

Email Purpose Type: **Phone Purpose Type:**

Bill To Customer

Ship To Customer

Sold To Customer

Mobile Customer Options page (1 of 2)

*Role Type ID	Role	Business Object Name Type	Relationship View Name	Spider Out To Relationships	360 View Tree Name	Three Sixty View Tab Number		
2	Company	PREFERRED	CONTACT VIEW	<input checked="" type="checkbox"/>	MOBILETREE	6	<input type="button" value="+"/>	<input type="button" value="-"/>
8	Contact	PREFERRED	FBI CONTACT	<input checked="" type="checkbox"/>	MOBILETREE	5	<input type="button" value="+"/>	<input type="button" value="-"/>
9	Individual Consumer	PREFERRED	CONSUMER CONTACTS	<input checked="" type="checkbox"/>	MOBILETREE	6	<input type="button" value="+"/>	<input type="button" value="-"/>

Mobile Customer Options page (2 of 2)

Default SetID	The ID for this set of options.
Show Relationship Viewer	Select this check box to display the Relationship Viewer on mobile devices. This field will not be enabled if the corresponding option in the Business Object Model System Options is not checked.
Spider Out to Customer	During a synchronization, this option controls whether the synchronization process spiders out to retrieve the full object , that is, Company, Contact, and so forth, or if only the Name is retrieved.
	<hr/> Note. If you check this box, there may be a slight decrease in system performance. <hr/>
Show 360 Degree View	Select this check box to display the 360 Degree View on mobile devices. This field will not be enabled if the corresponding option in the Business Object Model System Options is not checked.
Spider Out for 360 View	During a synchronization, as transactions are encountered this option will control whether the sync process will spider out to those transactions. If this option is checked, the synchronization process will spider out to send all relevant information to the Mobile Device.
Address Purpose Type	These are the defaults for the address contact methods that are created on the device. Delivered values are: <i>Physical Location, Business, Campus, Dormitory, Home, Legal, Mailing, and Other.</i>
Email Purpose Type	These are the defaults for the email contact method. Delivered values are: <i>Business, Campus, Dorm, Home and Other.</i>
Pager Purpose Type	These are the defaults for the pager contact method. Delivered values are: <i>Pager 1 and Pager 2.</i>
Phone Purpose Type	These are the defaults for the phone contact method. Delivered values are: <i>Business, Cell, Default, FAX, Home, Telex, Campus, Dormitory, main and Other.</i>
Bill To Customer	Select this check box if you want customers created on the mobile device to be Bill To customers. Addresses created for a Bill To customer will automatically be marked as a Bill To Address and the primary address will automatically be marked as a Primary Bill To Address. Bill To Customer means that invoices can be sent to the customer or site.
Ship To Customer	Select this check box if you want customers created on the mobile device to be Ship To customers. It should be noted that addresses created for such a Ship To customer will automatically be marked as a Ship To Address and the primary address will automatically be marked as a Primary Ship To Address. Ship To Customer means that invoices can be shipped to the customer or site.
Sold To Customer	Select this check box if you want customers created on the mobile device to be Sold To customers. It should be noted that addresses created for such a Sold To customer will automatically be marked as a Sold To Address and the primary address will automatically be marked as a Primary Sold To Address. Sold To Customer means that invoices can be sold to the customer or site.

Role Type ID	Displays the identification code associated with the business object role type. When adding a new role type, the system automatically assigns a value using automatic numbering functionality.
Role	Displays the role for which you want to view relationships.
Business Object Name Type	Displays the business object name type for which this role type is valid.
Relationship View Name	Select the relationship view that you want to associate with the role
Spider Out to Relationships	During a synchronization, as transactions are encountered this option will control whether the sync process will spider out to the relationships.
360 Degree Tree Name	The tree displays all activities and interactions for the company or contact. Plus, it can display an add and search node for the particular activity of the tree. Click the detail link to drill down to the detail pages for the activity. Click the add link to access a page where you can add the activity. Click the search link to access a page where you can search for the activity.
360 Degree Tab Number	Displays the tab number of the 360 Degree View.

See Also

PeopleSoft CRM 8.8 SPI Application Fundamentals PeopleBook, Working with the Relationship Viewer

PeopleSoft CRM 8.8 SPI Application Fundamentals PeopleBook, Business Object Management

PeopleSoft CRM 8.8 SPI Application Fundamentals PeopleBook, Interactions and 360 Degree Views

Defining Mobile Attachments Rules

Access the Attachment page.

Attachment page

Synch to Laptop (synchronize to laptop)	Select the synchronization options for attachments to be passed down from the database to the mobile device. Valid values are: <i>All</i> , <i>Size Up To</i> , and <i>None</i> . When you select <i>Size Up To</i> , the system enables you to select attachments up to a certain size.
--	--

Synch to PDA(synchronize to personal digital assistant)

Select the synchronization options for attachments to be passed down from the database to the mobile device. Valid values are: *All*, *Size Up To*, and *None*. When you select *Size Up To*, the system enables you to select attachments up to a certain size.

Setting Up Out-of-Date Detection

The four components (Company, Contact, Consumer, Site) in the PeopleSoft CRM mobile applications utilize the Basic table to accommodate out-of-date detection. In order to set up for out-of-date detection, you must enable basic data for the company, contact, consumer, and site roles on the Role Type page.

Page Used to Set Up Out-of-Date Detection

Page Name	Object Name	Navigation	Usage
Role Type	RBM_DD_ROLE	Set Up CRM, Common Definitions, Customer, Role Type	Define the role type for the components and to enable out-of-date detection.

Enabling Basic Data

Access the Role Type page.

Role Type
Default Views

Role Type

Role Type ID: 2

***Description:**

Short Description:

***Business Object Type:**

Transaction ID:

Enabled Role Icon:

Disabled Role Icon:

- Publish EIP**
- Join Indicator**
- Participant Indicator**
- Capture Contact Methods**
- Enabled for Basic Data**
- Enabled for Quick Create**

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

Application Class Path:

Role Type page

Enabled for Basic Data Select to enable maintenance of the Basic Data table. This also enables out-of-date detection for mobile customer applications.

See Also

PeopleTools PeopleBook: PeopleSoft Mobile Agent

PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook, Working with the Relationship Viewer, Viewing and Maintaining Relationships and Roles

PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook, Working with the Relationship Viewer

PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook, Business Object Management

PeopleSoft CRM 8.8 SP1 Application Fundamentals PeopleBook, Interactions and 360 Degree Views

CHAPTER 4

Working with Customer and Product Information on a Mobile Device

This chapter provides an overview of customer information in PeopleSoft Customer Relationship Management (PeopleSoft CRM) mobile applications and discusses how to:

- Work with companies, consumers, sites and contacts on a mobile device.
- Work with product information on a mobile device.
- Set up mobile product options.

Understanding Customer Information in PeopleSoft CRM Mobile Applications

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

PeopleSoft CRM mobile applications display customers CRM in a menu item that is separate from PeopleSoft FieldService or Sales functions.

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

Object	Actions Available on Mobile Devices
Company	<ul style="list-style-type: none">• View and update a company.• Create a new company.• Add contacts.• View site information.• Maintain notes and attachments.• View, add or delete a phone number, address, pager, and email.

Object	Actions Available on Mobile Devices
Consumer	<ul style="list-style-type: none"> • View and update a consumer. • Create a new consumer. • Add contacts. • View site information. • Maintain notes and attachments. • View, add or delete a phone number, address, pager, and email.
Contact	<ul style="list-style-type: none"> • View and update a contact. • Create a contact. • Add or delete an address, phone number, email, or pager number. • Maintain notes and attachments. • View associated customers.
Site	<ul style="list-style-type: none"> • View the site . • View the site name. • View the site address.

Understanding Products in CRM Mobile Applications

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

Note. PeopleSoft Mobile Sales and PeopleSoft Mobile Order Capture both use products for their transactions. While products are supported on the PDA, orders and quotes are supported only on the laptop computer.

Note. Although the business units that PeopleSoft Mobile Sales and Mobile Order Capture use can be different, their business units must be related to the same setID for product and customer. However, the setID for product and customer can be different.

Object	Actions Available on Mobile Devices
Product	<ul style="list-style-type: none"> • View product information. • Search for products.

See Also

PeopleSoft CRM 8.8 SPI Application Fundamentals PeopleBook, Product and Item Management

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

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

For help with PeopleSoft CRM mobile applications, return to this PeopleBook.

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

This section discusses how to: use companies on a mobile device, use consumers on a mobile device, use contacts on a mobile device, and use sites on a mobile device.

Note. You can't access the Relationship Viewer on a PDA.

See Also

PeopleTools PeopleBook: PeopleSoft Enterprise Components

Using Companies on a Mobile Device

Access the company page.

Role Summary					
Role	Company	Business Contact (ORG)	Ship To Organization	Sold To Organization	Bill To Organization

Company page on a laptop computer

Because mobile devices have limited processing power, storage capacity, and display space, mobile computing is different from online tethered computing. The mobile Company component:

- Allows you to view, edit, add, or delete some company detail.
- Provides no view of company profile information.
- Provides no access to edit roles, relationships, sites, purchasing options, attributes, or account information.
- Provides no access to lookup or selection of currency type.
- Provides no access to managing addresses, phone numbers, email addresses, or pager numbers for a site.
- Supports global address formats.
- Determines the default company currency from your user preferences.
- Sets the default the company setID to your default setID, as determined by your user preferences.
- In configuring the Relationship Viewer company, you can only select views where the role of the company would be at the top of the tree.
- In the 360-degree view, you can click the link on the tree to transfer to a detail component, but you can't initiate any other actions such as background processing.

See Also

PeopleSoft CRM 8.8 SPI Application Fundamentals PeopleBook, Defining Company Business Objects

Using Consumers on a Mobile Device

This section illustrates the Consumer page on mobile devices.

The screenshot shows the 'Consumer' page in a web application. At the top, there is a navigation bar with tabs for 'Consumer', 'Contact Method', 'Contacts', 'Sites', and 'Notes'. Below the navigation bar, the 'Consumer Name' is displayed as 'Hill, Larry'. The page contains several input fields and labels: 'SetID' (CRM01), 'Person ID' (100891), 'Country' (USA), 'Prefix' (empty), '*First Name' (Larry), 'Middle' (empty), '*Last Name' (Hill), and 'Suffix' (empty). Below these fields is a 'Role Summary' table with a header row and several data rows. The table has a search bar and navigation controls (First, 1-5 of 6, Last). The table lists the following roles: Person, Contact, Individual Consumer, Ship To Individual, and Sold To Individual.

Consumer page on a laptop computer

Because mobile devices have limited processing power, storage capacity, and display space, mobile computing is different from online tethered computing. The mobile Consumer component:

- Allows you to view, edit, add, or delete some company detail.

- Provides no view of consumer profile information.
- Provides no access to edit roles, relationships, sites, purchasing options, , attributes, or account information.
- Provides no access to employment and credit card information.
- Provides no access to lookup or selection of currency type.
- Supports global address formats.
- Determines the default consumer currency from your user preferences.
- Defaults the consumer set ID to your default set ID, as determined by your user preferences.
- In configuring the Relationship Viewer company, you can only select views where the role of the consumer is at the top of the tree.
- In the 360 degree view, you can click the link on the tree to transfer to a detail component, but you can't initiate any other actions such as background processing.

See Also

PeopleSoft CRM 8.8 SPI Application Fundamentals PeopleBook, Defining Consumer Business Objects

Using Contacts on a Mobile Device

Access the Contact Page.

Contact | Contact Methods | Customers | Notes

Contact Name: Amy,Michaels

SetID: CRM01 **Person ID:** 100940

Country: United States

Prefix:

***First Name:** **Middle:**

***Last Name:** **Suffix:**

Role Summary		Find View All First 1-2 of 2 Last
Role		
Person		
Contact		

Contact page

The mobile Contact component:

- Provides access to view, edit, add, or delete contact detail.
- Provides no view of contact profile information.
- Provides no access to edit roles, relationships, user profiles, financial accounts, credit cards, bill payees, notes, or attributes.
- In the 360-degree view, you can click the link on the tree to transfer to a detail component, but you can't initiate any other actions such as background processing.

- In configuring the Relationship Viewer company, you can only select views where the role of the contact is at the top of the tree.

You can add a new contact to a lead or opportunity, but the contact does not appear in the mobile database until you add the contact in your connected application and perform a full synchronization.

See Also

PeopleSoft CRM 8.8 SPI Application Fundamentals PeopleBook, Defining Contact Business Objects

Using Sites on a Mobile Device

Access the Site page.

Site Name: California Branch	
SetID: COM01	Site ID: 250024
Parent Customer: Softgear Inc.	Transfer To Parent Customer
Address Summary Find View All First 1-1 of 1 Last	
Primary	Address
<input checked="" type="checkbox"/>	298 Gene Drive, Redwood City, CA, 94063, USA

Site page on a laptop computer

The mobile Site component:

- Provides no editing capabilities.
- Provides no phone number, email address, and pager information.
- Provides no status and currency data.
- Provides no company profile information
- Provides no site type (premise and super-premise).
- Provides no installed services information.
- Provides no purchasing options and attributes.
- Provides a transfer to the parent company information.

See Also

PeopleSoft CRM 8.8 SPI Application Fundamentals PeopleBook, Defining Site Business Objects

Working with Product Information on a Mobile Device

The dataset rules enable role-based filtering and distribution of data. You can determine what products are passed to your mobile device by defining data distribution rules that are based on datasets. The data set may differ depending on the mobile device.

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

PeopleSoft delivers these data distribution rules for products:

- Product range.

You can restrict the range of products that can be passed to the mobile device. For example, you can specify product IDs A1000–A2999.

- Product group.

You can include products from a particular product group.

- Product category.

You can include products from a particular product category.

- All products by a setID.

You can include all products with a particular setID.

- Products for businesses.

You can include any business products.

- Products for consumers.

You can include any consumer products.

- Configurable products.

You can include any configurable products.

- Products by market.

You can include any products for a particular market.

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

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

Common Elements Used in this Section



This icon is for information only and indicates that the selected product is part of a dynamic product package.



This icon is for information only and indicates that the selected product is a configured product.

Using Products on a Mobile Device

Access the Details page.



Details page on a laptop computer

The mobile Details page enables you to:

- View product status.
- View product image (if available).
- View product attachment.
You can click an attachment file name link and save it to local file system.
- View product group information.
- View product relationship information.
You can click the related product ID link under Product Relationship Detail page to transfer to that related product detail page.
- View product ID.
- View product description.
- View unit of measure.
- View currency.
- View list price.
- Determine if the product is a package.
- Determine if the product is a configured product.
- Enter product notes.

See Also

PeopleSoft CRM 8.8 SPI Application Fundamentals PeopleBook, Product and Item Management

Setting Up Mobile Product Options

Before you use the mobile product, you need to set up the following options:

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

Pages Used to Set Up Mobile Product Options

Page Name	Object Name	Navigation	Usage
Mobile Product Defaults	MOC_OPTIONS_PG	Set Up CRM, Install, Mobile, Mobile Product Options	Determine how the attachments and images are synchronized from the database to the mobile device.

Setting Up Mobile Product Defaults

Access the Mobile Product Defaults page.

The screenshot displays the 'Mobile Product Defaults' page with two main sections: 'Laptop Settings' and 'PDA Settings'. Each section contains an 'Attachments' sub-section and an 'Images' sub-section.

Laptop Settings:

- Attachments:** Type is set to 'All Attachments' (dropdown), and Size (bytes) is an empty text box.
- Images:** Set to 'Medium Image' (dropdown).

PDA Settings:

- Attachments:** Type is set to 'No Attachments' (dropdown), and Size (bytes) is an empty text box.
- Images:** Set to 'No Image' (dropdown).

Mobile Product Defaults page

Laptop Settings

Type

Select the synchronization option for attachments that are to be passed down from the database to the laptop computer. Valid values are: *All Attachments*, *Custom Size* and *No Attachments*. When you select *Custom Size*, the system enables you to select attachments that are less than a certain size.

Size (bytes) Specify the size (in bytes) of the attachments that you want to pass down from the database to the laptop computer. The system delivers only attachments that are less than the specified size.

Images Select the size of the product images that you want to pass down from the database to the laptop computer. Values are: *Large Image*, *Medium Image*, *No Image*, *Small Image*, and *Zoom Image*. The default is *Medium Image*.

PDA Settings

Type Select the synchronization option for attachments that are to be passed down from the database to the PDA. Values are: *All Attachments*, *Custom Size* and *No Attachments*. When you select *Custom Size*, the system enables you to select attachments that are less than a certain size.

Size (bytes) Specify the size (in bytes) of the attachments that you want to pass down from the database to the PDA. The system will only deliver attachments that are less than the specified size.

Images Select the size of the product images that you want to pass down from the database to the PDA. Valid values are: *Large Image*, *Medium Image*, *No Image*, *Small Image*, and *Zoom Image*. The default is *Medium Image*.

Note. By default, PDA settings are currently unavailable for selection in PeopleSoft Mobile Order Capture.

See Also

PeopleSoft CRM 8.8 SPI Application Fundamentals PeopleBook, Setting Up Products

CHAPTER 5

Using PeopleSoft Mobile Order Capture

This chapter describes the features of PeopleSoft CRM Order Capture available on a laptop computer, including how to:

- Work with customer and products.
- Work with orders and quotes.

Note. To start PeopleSoft Mobile Order Capture, you need to run the local application alongside the PeopleSoft Mobile Agent. Select Start, Programs, PeopleSoft Mobile Agent, Start PS Mobile Agent to launch PeopleSoft Mobile Agent. Then, select Start, Programs, PeopleSoft Mobile Agent, PS Mobile Application to launch the application itself.

Working with Customers and Products

PeopleSoft CRM Mobile Order Capture enables you to view customer and product information on mobile devices for *one* predefined SetID.

Although business units used by PeopleSoft Mobile Order Capture and PeopleSoft Mobile Sales can be different, their business units must be related to the same SetID for customers and products. The SetID for customers and products can be different.

Note. Consumers and sites are not supported in PeopleSoft Mobile Order Capture. Neither can you create a new customer on your laptop and use them on an order. Customers need to have any or all of the Sold To, Bill To, and Ship To options setup by a CSR in PeopleSoft CRM before they can be used in PeopleSoft Mobile Order Capture.

See [Chapter 4, Working with Customer and Product Information on a Mobile Device, Working with Companies, Consumers, Contacts, and Sites on a Mobile Device, page 23.](#)

PeopleSoft Mobile Order Capture stores product information as follows:

- Product information is extensive, but is for information purposes only, and cannot be modified.
- Product images are optional. Product options allow you to specify whether or not to download product images, and if so, which image size to download.
- Attachments are optional, and can be controlled by file size. You control attachment size by defining the maximum file size (in bytes) that will be downloaded.
- Product information includes list price, unit of measure (UOM) and currency.

Pages Used to View Product Information

Page Name	Object Name	Navigation	Usage
Details	MOC_PROD_DET	Products CRM, Product Definition Select a Product, Details	Use the Details page to view product information, such as Description and List Price.
Notes	MOC_PROD_DET	Products CRM, Product Definition Select a Product, Details, Click the Notes tab	Use the Notes page to view note information for a specific product.
Attachments	MOC_PROD_DET	Products CRM, Product Definition Select a Product, Details, Click the Attachments tab	Use the Attachments page to view attachment information for a specific product.
Product Groups	MOC_PROD_DET	Products CRM, Product Definition Select a Product, Details, Click the Product Groups tab	Use the Product Groups page to view product group information for a specific product.
Relationships	MOC_PROD_DET	Products CRM, Product Definition, Select a Product, Details, Click the Relationships tab	Use the Relationships page to view upsell and cross-sell information for a specific product.
Relationship Details	MOC_PROD_DET	Products CRM, Product Definition Select a Product, Details, Click the Relationships tab, Click the icon for a Related Product	Use the Relationship Details page to view more detailed upsell and cross-sell relationships for a specific product.

Viewing Products in PeopleSoft Mobile Order Capture

Access product definition pages, such as the Details page or Relationships page.

Details | Notes | Attachments | Product Groups | Relationships

Product ID: SR2010

Walk-In Freezer 7' 9" x11'




Description: Walk-In Freezer 7ft 9in x11ft
Status: Active
Category: WALK-INS






Currency	List Price	UOM
US Dollar	\$6606.00	Each

Product Definition — Details page

Details | Notes | Attachments | Product Groups | **Relationships**

Product ID: SR2010

Find | View All | 

Related Product	Description	Relationship
 10019	Freezer, Shelves	Cross-Sells
 10020	Freezer Thermostat	Cross-Sells
 10021	Freezer, Light Bulb	Cross-Sells
 10022	Freezer, Compressor	Cross-Sells
 SR2900	Custom Build Freezer Package	Up-Sells

Product Definition — Relationships page

When you drill on the icon next to the Related Product, you'll view the Relationship Details page:

Relationships

Product ID: [SR2010](#)

Related Product ID	Related Product Description	Product Relationship
10019	Freezer, Shelves	Cross-Sells

Relationship Details page

Note. Although, product relationships can be viewed from the product pages, as seen above, Upsell and Cross Sell icons will not appear on the order line, as they do in online entry.

Working with Orders or Quotes

In this section, we explain how to:

- Create new orders or quotes.
- View existing orders or quotes.

Pages Used to View or Create Orders or Quotes

Page Name	Object Name	Navigation	Usage
Create Order/Quote	MOC_DUMMY_PG	Orders and Quotes, Create Order/Quote. Click the Create Order button	Use the Create Order/Quote page to create new orders or quotes.
Entry Form	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form	Use the Entry Form page to begin creating a new order or quote, or view an existing order or quote.
Line Details (Summary)	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, Line Details	Use the Line Details (summary) page to view all order lines for this order, and to add order lines to the order.
Line Details	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, Line Details, Click the details icon for an existing line to view details, or click the <i>Add</i> button to add a new line to the order	Use the Line Details page to view all a single line's details, to make edits to the line details, and to add to the order.
Shipping (Summary)	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, Click the Shipping tab or select the Shipping link	Use the Shipping page to view a summary of Ship To information, such as <i>Customer</i> , <i>Contact</i> , and <i>Requested Date of Shipment</i> .
Shipments (Details)	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, Click the Shipping tab or select the Shipping link, Click the details icon next to the Customer	Use the Shipments page to change or view detailed shipping information.
Billing	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, Select the Billing link	Use the Billing page to change or view billing information related to the order.

Page Name	Object Name	Navigation	Usage
Summary	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, Select the Summary link	Use the Summary page to view an entire summary of the order or quote.
Holds	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, Select the Holds tab	Use the Holds page to view holds on the order.
Notes	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, Select the Notes tab	Use the Notes page to add or view a note or attachment.
Related Objects	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, Select the Related Objects tab	Use the Related Objects page to view related objects.

Creating New Orders or Quotes

Access the Entry Form page.

[Entry Form](#) [Line Details](#) [Shipping](#) [Holds](#) [Notes](#) [Related Objects](#)

[Entry](#) [Shipping](#) [Billing](#) [Summary](#)

Order ID: MOCREPS0002
Status: Pending
Description: MOCREPS0002
Promotion: 10%OFFSECTIONALS
Priority: Medium
***Source:** Phone
***Order Date:** 05/07/2003
Total Price: 6606.00
Currency: USD
Customer: Shoreview Medical
Contact: Pepper, Jack Joseph

Entry Form page

Note. The toolbar buttons displayed within PeopleSoft Mobile Order Capture are standard PeopleSoft Order Capture icons, and are explained in the Common Elements section of the Managing Orders and Quotes chapter of the *PeopleSoft 8.8 CRM Collaborative Selling PeopleBook*. Here the icons represent, *Save Order*, *Submit Order*, *Add Order Line*, and *Cancel Order*, respectively. Personalization of the toolbar icons is not supported in PeopleSoft Mobile Order Capture.

Order ID	The order ID will initially default to <user id><capture type><sequence number>. For example, if your user ID is “MOCREP” and you are entering your first order, the order ID will be set to “MOCREPSO001.” If you are entering your second quote, the quote ID will be “MOCREPQUO002.”
	<hr/> Note. The order ID will be overwritten by the server upon synchronization. For example, if you have created a mobile order with the ID of “MOCREPSO001,” it will change to a number. The format is determined by the Capture Type workbench when you next synchronize. <hr/>
Status	There are six delivered statuses: <i>Open</i> , <i>Pending</i> , <i>In Process</i> , <i>Hold</i> , <i>Complete</i> , or <i>Canceled</i> .
Description	Enter descriptive information here. The Order ID is the default entry.
Promotion	Select a Promotion for the line.
Priority	Enter a capture priority of <i>Urgent</i> , <i>High</i> , <i>Medium</i> , or <i>Low</i> to specify the default priority for all orders that are created in the business unit.
Source	Enter an informational code that identifies the source of the order. For example, you could specify <i>Phone</i> if you received this order by telephone.
	<hr/> Note. This is a required field so you must choose a value. <hr/>
Order Date	Select the date of order entry. By default, today’s date will be entered here.
Total Price	Total price of the order appears here.
Currency	Currency code is selected on the Create Order/Quote page, and displays here.
Customer	Select the sold-to customer for this order.
Contact	Select the contact person for this customer. The Sold To contact will be automatically populated after selecting a Sold To customer.

See *PeopleSoft 8.8 CRM Collaborative Selling PeopleBook*

Adding Products to the Order

Access the Line Details page.

Entry Form Line Details Shipping Holds Notes Related Objects							
Line Details						Find View All	First 1-1 of 1
Line	Description	Product	Order Qty	Unit Price	Delete		
1	Walk-In Freezer 7ft 9in x1 1ft	SR2010	1	6606.00	Delete		
Add							

Line Details (summary) page

Line Details displays a summary of products (or order lines) connected to this order. Click the details icon next to the line number to drill into product detail information for a specific order line. Click the *Add* button to add another product to the order. When you click the *Add* button, and choose a product, the following Line Details page appears:

Line Details

Line: 1

Status: Open

Product: [SR2010](#)

Description: Walk-In Freezer 7ft 9in x1'

***Unit of Measure:**

List Price: 6606.00

Currency: USD

Order Qty:

Unit Price:

Promotion:

Minimum Price: 0.00

Recurring Price: 0.00

Recurring Frequency:

Total Price: 6606.00

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

Line Details page

The Line Details page indicates the list price and total price for the line. If the order has been synchronized, the price is the final price that includes all surcharges or discounts set up in pricing. Any special pricing is applied when synchronizing the order with the server.

- Unit of Measure** Select the unit of measure for this product.
- List Price** List price displays from the product definition, and is the price before the application of any price adjustments, such as discounts or surcharges.
- Order Qty** Enter the quantity of product for this order line.
- Unit Price** Unit price is the price of the product after pricing adjustments are applied (by the pricing engine).

Note. For PeopleSoft Mobile Order Capture, pricing adjustments are only applied once the order has been synchronized with the main application.

Promotion	Select a promotion code from the lookup.
Minimum Price	Minimum price is determined by product setup. If you enter a unit price that is below the minimum price on the line, and then attempt to submit the order, a hold is generated at synchronization, and the order cannot continue without a manual override.
Recurring Price	If this product has a recurring price, that recurring price amount appears here. You combine the recurring price with recurring frequency to arrive at a price. This could be, for example, a price that repeats each month, or a charge that occurs each year.
Recurring Frequency	As opposed to one time charges, these charges indicate charges that occur with varying frequency, such as <i>weekly</i> , <i>monthly</i> , or <i>annual</i> charges.
Total Price	This is the total price of this order line.
Save	Click the <i>Save</i> button to add this line to the order.

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

Changing or Viewing Shipping Information

Access the Shipping page to view a summary of shipment information. Click the details icon next to a specific customer to access the Shipping (details) page and enter or change shipping information:

Shipping		
Customer	Contact	Requested Date
Shoreview Medical	Pepper, Jack Joseph	05/28/2003

Save [Return to List](#)

Shipping (summary) page

Shipments

Customer: Shoreview Medical

Contact: Pepper,Jack Joseph

Address: 2455 Augustine Drive,Santa Clara,CA,95054,USA

Carrier: UPS

Requested Date: 05/28/2003

Description:

Line Detail					
Line	Product Description	Product	UOM	Order Qty	List Price
1	Walk-In Freezer 7ft 9in x11ft	SR2010	Each	1.0000	\$6606.00

Shipments (details) page

Customer, Contact Change the customer and contact information by clicking the *Search* button and making a different selection.

Address The address where the shipment is delivered. This address defaults primary shipping contact (and primary shipping address for the customer) from the customer data model.

Carrier Select a carrier for this shipment by clicking the *Search* button, and making a selection.

Requested Date Enter a requested arrival date for the shipment here. Note that you can specify a future shipment date.

Description Enter any additional shipment information in this field.

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

The Line Detail grid displays the order lines associated with each ship-to location.

Changing or Viewing Billing Information

Access the Billing page.

Billing page

We have previously explained fields that appear on the Billing page, with the exception of the following:

Customer, Contact

Customer and Contact displayed here are the Bill To equivalents, although they are not necessarily the same ones as those that are on the Shipping or Entry Form pages.

Address

This address is the billing address. By default, the primary billing contact and the primary billing address are populated from the customer data model.

PO Number

Enter the Purchase Order number, if applicable.

PO Received

Select this check box if a Purchase Order has been received.

Note. This functionality is designed solely for auditing purposes. There is no attached business logic.

Payment Terms

Select terms of payment, such as *Due Immediately*.

Managing Holds

Holds appear on the Holds page. You cannot remove holds in PeopleSoft Mobile Order Capture, you can only view them. Held orders are maintainable; thus you can correct the problems caused by certain holds from the main PeopleSoft Order Capture application. For example, if the order is held because an invalid Bill To customer was specified on the order (or no Bill To customer was specified at all), the user can change the Bill To customer and perform a synchronization. The hold is then lifted.

Adding Notes

Access the Notes summary page, and then click on the details icon to drill into Notes details.

Notes

Added By: MOCREP **Datetime Added:** 05/07/2003 9:35 AM

***Summary:**

Details:

Related Line:

Attachments
Description
Add

Notes (Detail) page

Viewing Related Objects

View related objects on this page. A related object is data, such as a business project, that is somehow related to the order or quote. If the data exists on the mobile device, you will have the option to link to that data. For example, if there is an sales opportunity associated with this order and it exists on the mobile device, you will be able to transfer to that opportunity from here.

Understanding Third Party and Miscellaneous Calculations

These following third party and miscellaneous charges may be applied to the order during synchronization:

- Pricing discounts, surcharges, or both.
- Freight.
- Tax.
- VAT.
- Product giveaways.

Viewing Existing Orders or Quotes

You may view existing orders or quotes by using the “Search Orders and Quotes” menu option. The pages will be the same as above. Only quotes, unsubmitted orders and orders that are on hold can be modified.

CHAPTER 6

Using PeopleSoft Mobile Sales

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

- Use the Sales Dashboard on a mobile device.
- Work with leads and opportunities on a mobile device.
- Use tasks on a mobile device.
- Use forecasts on a mobile device.

Note. To start PeopleSoft Mobile Sales, you need to run the local application alongside the PeopleSoft Mobile Agent. Select Start, Programs, PeopleSoft Mobile Agent, Start PS Mobile Agent to launch PeopleSoft Mobile Agent. Then, select Start, Programs, PeopleSoft Mobile Agent, PS Mobile Application to launch the application itself.

Understanding Transactions in PeopleSoft Mobile Sales

PeopleSoft Mobile Sales delivers much of the functionality of PeopleSoft Sales to mobile devices. The functionality that is available on your device may differ depending on the device and the permissions that are set by your administrator.

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

Note. Customers need to have Sold To, Bill To, and/or Ship To options setup by a CSR in PeopleSoft CRM before they can be used in PeopleSoft Mobile Sales.

Object	Actions Available on Mobile Devices
Sales Dashboard	View summaries of the lead, opportunities, forecasts, and tasks.

Object	Actions Available on Mobile Devices
Lead	<ul style="list-style-type: none"> • View and update a lead. • Create a new lead. • Convert a lead to an opportunity. • Clone a lead. • Add a product, task, or note. • Delete a product or note. • Turn back a lead. • Create a quote or order (when Mobile Order Capture is installed).
Opportunity	<ul style="list-style-type: none"> • View and update an opportunity. • Create a new opportunity. • Add or delete a product, task, forecast, or note. • Add a forecast amount to an opportunity. • Create and order or quote (when Mobile Order Capture is installed).
Task	<ul style="list-style-type: none"> • View and update a task. • Create a task (from a lead or opportunity).
Forecast	<ul style="list-style-type: none"> • View the revenue forecasts. • Update your forecasts. • Submit your forecasts • Reforecast. • Display subtotals. • Display a bar chart of the forecast data. • Export forecast subtotals.

Using the Sales Dashboard on a Mobile Device


This section illustrates the Sales Dashboard and explains how to set the Sales Dashboard preferences.

Pages Used to View and Set Up the Sales Dashboard

Page Name	Object Name	Navigation	Usage
Sales Dashboard	RSFM_SALES_VIEWER	Sales, Sales Dashboard	View summarized information about selected sales objects.
My Sales Dashboard Preferences	RSFM_SV_PREFS	Click the Personalize this page icon on the Sales Dashboard page.	Define what information will appear on the Sales Dashboard.

Using Sales Dashboard on a Mobile Device

Access the Sales Dashboard page.

Sales Dashboard					
					
My Leads Find View All First 1-5 of 5 Last					
Lead	Contact	Phone	Status	Rating	Est. Revenue
AHH Lead	AHHH,AHH		Open		
Computers for IMC	Gomez,Selma	949/226-9881	Open	Hot	15,000.000
Hardware upgrade for MD Engineering	Bardini,Agnes	907/558-6987	Open	Warm	25,000.000
smoke test	Gill,Elaine	949/226-9887	Open	Warm	
smoke test, Cloned# 1	Gill,Elaine	949/226-9887	Converted to Opportunity	Warm	
My Opportunities Find View All First 1-5 of 5 Last					
Opportunity	Contact	Phone	Status	Est. Close Date	Est. Revenue
Valley Health Hardware	Davis,Bud	925/410-5554	Open	06/13/2002	200,000.000
Global Payment hardware	Depp,Michael	925/847-3322	Open	06/19/2002	200,000.000
smoke test, Cloned# 1	Gill,Elaine	949/226-9887	Open		
DT - Bookmark Company	Dtlast1,Dtfirst1		Open	04/14/2003	56,999,000.000
DT - Bookmark Consumer	Conf1,Conf1		Open	04/22/2003	564,000.000
My Forecasts Find View All First 0-0 of 0 Last					
Forecast	Time Frame			Total	

Sales Dashboard page (1 of 2)

My Tasks						
Select	Subject	Task Type	Status	Start Date	Start Time	Assigned To
Select	Test Task CONTACT_ID		Pending	05/01/2003		Peterson, Frank T
Select	Appointment with James	Appointment	Pending	07/02/2002	1:00 PM	Peterson, Frank T
Select	Demo of Computer Hardv	Demonstration	Pending	02/12/2003	10:00 AM	Peterson, Frank T
Select	Demonstrate Disk IO cap	Demonstration	Pending	02/13/2002	2:00 PM	Peterson, Frank T
Select	task2	Appointment	Pending	04/21/2003	3:00 AM	Peterson, Frank T
Select	modify smoke task 1 22	Meeting	In Process	04/22/2003	12:35 AM	Peterson, Frank T
Select	Test	Appointment	Completed	04/14/2003	10:00 AM	Peterson, Frank T
Select	Test	Appointment	Pending	04/14/2003	10:00 AM	Peterson, Frank T
Select	TEST	Appointment	Pending	04/14/2003	10:00 AM	Peterson, Frank T
Select	Test	Appointment	Pending	04/14/2003	10:00 AM	Peterson, Frank T

My Quotes & Orders						
Order Id	Status	Date Created	Customer	Contact	Type	
75a898c26d7811d7bb33	Pending	04/12/2003	Bardini, Agnes	Bardini, Agnes	Quote	
914cb9aa6d6211d7bafb	Pending	04/12/2003	MD Engineering	dtlast1, dtfirst1	Order	
7eb7f756d6211d7bae4	Pending	04/12/2003	MD Engineering	dtlast1, dtfirst1	Quote	
6cc4428b6d6011d7bacc	Pending	04/12/2003	Bardini, Agnes	Bardini, Agnes	Order	
33a997d86d6011d7babe	Pending	04/12/2003	Bardini, Agnes	Bardini, Agnes	Quote	

Sales Dashboard page (2 of 2)

The Sales Dashboard provides:

- A summarized view and access to the detail page of the Lead, Opportunities, and Tasks.
- The latest forecast graph.
- The ability to customize the Dashboard page.
- Links to the customer.
- Links to the contact and the contact's phone number.

Setting Your Sales Dashboard Preferences

Access the My Sales Dashboard Preferences page.

My Sales Dashboard Preferences	
My Recent Forecast Graph	
Forecast Graph:	<input checked="" type="checkbox"/>
Subtotal by 1:	Adjusted By
Subtotal by 2:	

My Sales Dashboard Preferences Page — My Recent Forecast Graph section

The My Sales Dashboard Preferences page is split into multiple sections which enable you to define what information displays on your Sales Dashboard. Selecting or clearing the check box in each section determines what type of information will be displayed. You have further opportunity to define how the information is displayed by selecting Sort By and Sort Order options, and the like.

Forecast Graph

Select to display a forecast graph on the Sales Dashboard.

Subtotal by 1 and Subtotal by 2

You must enter a value for Subtotal by 1 to display a graph.

Selecting an object for Subtotal by 2 enables you to view more detailed information about a forecast. For example, the overall forecast might be for March, 2003. To display a graph that shows confidence levels groups by region. You would select *Confidence %* for Subtotal by 1 and *Region* for Subtotal by 2.

Subtotal options are:

- Adjusted By
- Business Unit
- Confidence %
- Customer
- Customer Role Type
- Estimated Close Date
- Forecast Type
- Industry
- Local Currency
- Opportunity
- Opportunity Status
- Product
- Product Group
- Region
- Revenue Dimension 1
- Revenue Dimension 2
- Revenue Type
- Sales Model
- Sales Stage
- Sales User
- Stage % Close
- Territory
- Territory in Tree
- Tree Name

My Leads	
My Leads:	<input checked="" type="checkbox"/>
Num. of Leads to Display:	<input type="text" value="5"/>
Sort By:	<input type="text"/> <input type="button" value="v"/>
Sort Order:	Ascending <input type="button" value="v"/>

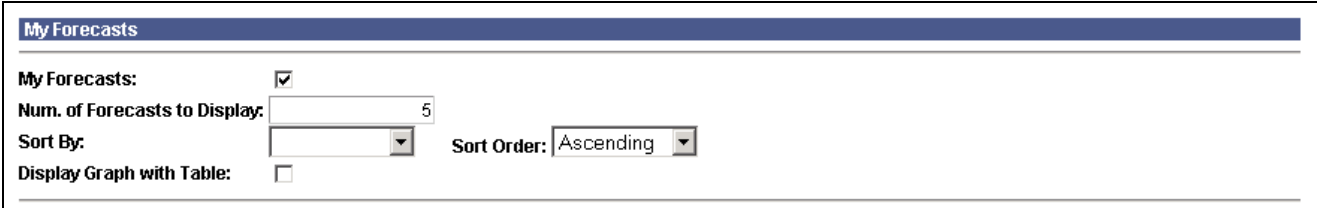
My Sales Dashboard Preferences Page – My Leads section

- My Leads** Select to display leads on the Sales Dashboard page.
- Num. of Leads to Display**(number of leads to display) Indicate the maximum number of leads to display in the collection.
- Sort By** Select the object by which results are sorted.
- Sort By options are:
- Contact
 - Estimated Revenue
 - Lead Name
 - Lead Rating
 - Lead Status
- Sort Order** Select ascending or descending sort order for results.

My Opportunities	
My Opportunities:	<input checked="" type="checkbox"/>
Num. of Oppys. to Display:	<input type="text" value="5"/>
Sort By:	<input type="text"/> <input type="button" value="v"/>
Sort Order:	Ascending <input type="button" value="v"/>

My Sales Dashboard Preferences Page – My Opportunities section.

- My Opportunities** Select to display opportunities on the Sales Dashboard page.
- Num. of Oppys. to Display** (number of opportunities to display) Indicate the maximum number of opportunities to display in the collection.
- Sort By** Select the object by which results are sorted.
- Sort By options are:
- Contact
 - Est. Close Date (estimated close date)
 - Estimated Revenue
 - Opportunity Name
 - Opportunity Status
- Sort Order** Select ascending or descending sort order for results.



My Sales Dashboard Preferences Page – My Forecasts section

My Forecasts

Select to display forecasts on the Sales Dashboard page.

Num. of Forecasts to Display (number of forecasts to display)

Indicate the maximum number of forecasts to display in the collection.

Sort By

Select the object by which results are sorted.

Sort By options are:

- Forecast
- Time Frame
- Total

Sort Order

Select ascending or descending sort order for results.

Display Graph with Table

Select check box to display the forecast graph on the page with the subtotals table. Clear the check box to display the graph on a separate tab.



My Sales Dashboard Preferences Page – My Tasks section

My Tasks

Select to display tasks on the Sales Dashboard page.

Sort By

Select the object by which results are sorted.

Sort By options are:

- Sales User
- Start Date
- Start Time
- Task
- Task Status
- Task Type

Sort Order

Select ascending or descending sort order for results.

Num. of Tasks to Display (number of tasks to display) Indicate the maximum number of tasks to display in the collection.

The screenshot shows a section titled "My Quotes & Orders" with a blue header bar. Below the header, there are three rows of controls:

- A row with the label "My Quotes:" followed by a checked checkbox.
- A row with the label "Num. of Quotes to Display:" followed by a text input field containing the number "5".
- A row with the label "Sort By:" followed by a dropdown menu (currently blank) and the label "Sort Order:" followed by a dropdown menu containing the text "Ascending".

 The section is enclosed in a thin black border with a blue bar at the bottom.

My Sales Dashboard Preferences Page – My Quotes & Orders section

My Quotes Select to display quotes on the Sales Dashboard page.

Num. of Quotes to Display (number of quotes to display) Indicate the maximum number of quotes to display in the collection.

Sort By Select the object by which results are sorted.

Sort By options are:

- Capture Date
- Contact
- Customer
- Order ID
- Status
- Type

Sort Order Select ascending or descending sort order for results.

Using Leads and Opportunities on a Mobile Device

There are differences to be aware of when working with your off-line leads and opportunities. The PeopleSoft Mobile Sales Lead and Opportunity components are different than the tethered products in that:

- The user interface on the mobile device is slightly different. Access to contacts, products, tasks, and notes from tabs rather than using drop-down list boxes or expand-all options.
- History and attributes are not part of the mobile application.

In this section we explain how to use a mobile device to:

- Manage Leads.
- Convert a lead to an opportunity.
- Manage opportunities.
- Clone leads and opportunities.

- Close leads.
- Close opportunities.

Pages Used to Manage Leads and Opportunities

Page Name	Object Name	Navigation	Usage
Discover (Leads)	RSFM_LEAD	Sales, Leads, Select a Lead, Discover.	View and manage leads.
Convert Lead to Opportunity	RSFM_CONVERTLEAD	Click the Convert Lead to Opportunity icon on the (Leads) Discover page.	Select options to convert a lead to an opportunity.
Discover (Opportunities)	RSFM_OPPORTUNITY	Sales, Opportunities, Select an Opportunity, Discover.	View and manage opportunities.
Clone Lead	RSFM_CLONELEAD	Click the Clone Lead icon on the Discover page.	Select items to copy from the original lead to a clone.
Clone Opportunity	RSFM_DT_OPP_CLONE	Click the Clone Opportunity icon on the (Opportunities) Discover page.	Select items to copy from the original opportunity to a clone.

Managing Leads on a Mobile Device

Access the Discover page for Leads.

Discover
Assign
Qualify
Propose
Tasks
Notes

*Lead: Contact: Gomez,Selma

Lead

Sales Rep: Peterson, Frank T
Rating:
Status:
Est. Revenue:
Currency: US Dollar
Priority:
Business Unit: US300

Customer

Company: [IMC, Inc](#)
Address: 7100 Irvine Ave, Irvine, CA, 92602, USA
Site:
Site Address:

Contacts

	Primary	First Name	Last Name	Details	Role	Preferred Communication	Work Phone	Ext	
<input type="button" value="A"/>	<input type="checkbox"/>	James	Keith	<input type="button" value="Details"/>	Manager <input type="button" value="Q"/>	Call <input type="button" value="v"/>	404/317-5022	342	<input type="button" value="-"/>
<input type="button" value="A"/>	<input type="checkbox"/>	Teri	Katen	<input type="button" value="Details"/>	Consultant <input type="button" value="Q"/>	Call <input type="button" value="v"/>	612/340-1212	332	<input type="button" value="-"/>
<input type="button" value="A"/>	<input type="checkbox"/>	Alan	Lee	<input type="button" value="Details"/>	Customer <input type="button" value="Q"/>	Call <input type="button" value="v"/>	612/340-1412	3322	<input type="button" value="-"/>
<input type="button" value="A"/>	<input checked="" type="checkbox"/>	Selma	Gomez	<input type="button" value="Details"/>	Purchasing <input type="button" value="Q"/>	Call <input type="button" value="v"/>	949/226-9881	9889	<input type="button" value="-"/>

Discover page for leads on a laptop computer

- When you clone a lead in the standard Leads component, not all of the cloned data will be downloaded to the mobile device.
- When you synchronize the cloned data back to the database, any cloned data that was previously not downloaded to the mobile device will be reattached to the old lead.
- Provides access to territory, region, and business unit on the Lead Details page.
- Provides a range of products for selection based on data distribution and user rules.
- The default business unit for your mobile role determines the business unit that is displayed on your mobile device. As a result you can only enter leads that are for your default business unit.

See Also

PeopleSoft Sales 8.8 SP1 PeopleBook, Managing Sales Leads and Opportunities

Converting a Lead to an Opportunity on a Mobile Device

Access the Convert Lead to Opportunity page.

STEP 1: Link to Existing or Create a new Opportunity

Select Select to convert and merge the lead into an existing opportunity.

Note. Only opportunities from the same company as the lead are available to merge.

Create New Opportunity

Select to convert the lead into a new opportunity.

Transfer to New Opportunity

Select to transfer to the opportunity when you click OK.

When cleared, the system returns you to the Leads page that you were on when you clicked the convert button.

Note. This region appears only if there are opportunities.

STEP 2: Select Data to Copy**(Check boxes)**

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

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

STEP 3: Complete Conversion**OK**

Click to have the system save the opportunity to your Opportunities List and Opportunities details component, and make the opportunity available for you to continue updating and managing it.

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

Managing Opportunities on a Mobile Device

Access the Discover page.

Discover
Assign
Qualify
Propose
Tasks
Notes

Opportunity: **Contact:** Davis,Bud

Opportunity

Status: **Priority:**
Est. Revenue: **Currency:** US Dollar
Est. Close Date: **%Close:** 15
Forecast: **Confidence %:**
***Forecast Amount:** ***Forecast Type:**

Sales Process:
Sales Stage:
Sales Task:
Sales Rep: Peterson, Frank T
Business Unit: U8300

Customer

Company: [Valley Health Medical Center](#)
Address: 8868 Valley Ave, Pleasanton, CA, 94588, USA Edit Address
Site: Add Address

Contacts

Primary	First Name	Last Name	Details	Role	Pref Comm	Work Phone	Ext	
<input type="checkbox"/>	Michael	Depp	Details	Purchasing	Call	925/847-3322	544	-
<input type="checkbox"/>	Susan	Chai	Details	CEO - Chief	Call	925/410-5552	334	-
<input checked="" type="checkbox"/>	Bud	Davis	Details	Manager	Call	925/410-5554	324	-

Add

Discover page for opportunities on a laptop computer

The mobile Opportunity component:

- Provides access region on the Opportunity Details page.
- Provides Order Capture functionality if the customer has purchased PeopleSoft Mobile Order Capture.

See Also

PeopleSoft Sales 8.8 SP1 PeopleBook, Managing Sales Leads and Opportunities

Cloning Leads and Opportunities on a Mobile Device

To clone an existing lead or opportunity, options are:

- For leads, access the Leads List page, and then click the Edit This Sales Lead button to the left of the lead that you want to copy.

The Discover page of the Leads details component appears. Click the Clone Lead toolbar button.

- For opportunities, access the Opportunities List page, and click the Edit This Sales Opportunity button to the left of the opportunity that you want to copy.

The Discover page of the Opportunities details component appears. Click the Clone Opportunity toolbar button.

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

Closing Leads on a Mobile Device

To close a lead, access the Lead details component Discover page and enter the appropriate status, either *Closed* or *Closed - Duplicate*. You may also close a lead by setting the status to *Turnback*. When this status is selected, a Reason field displays on the page. You must select a reason that the lead was turned back before saving the page.

Closing Opportunities on a Mobile Device

To close an opportunity, access the Opportunities details component Discover page and enter the appropriate status, either *Closed - Won* or *Closed - Lost*. If the opportunity is Closed — Lost, you must enter comments and other data regarding the loss before saving the page. Also, you must review the forecast items and either select or clear the Forecast check box to keep them in or remove them from the forecast, respectively.

After you close the opportunity, the system displays the actual close date and actual revenue on the Opportunities List page's Close tab for the opportunity.

Status	Values are <i>Closed - Won</i> and <i>Closed - Lost</i> .
Comment	Enter a reason for the win or loss.
Actual Revenue	Displays the actual revenue from the closed - won opportunities. An actual revenue amount is required to close the opportunity successfully.
Actual Close Date	Enter the close date; the system's current date is the default.
Fallout Reason	This field appears only for closed - lost opportunities. You must select a reason for why the sale was lost. Define fallout reasons on the Fallout Reason page. Entering a fallout reason helps to track and identify patterns of losses.
Forecast	Select for each item that you want to include in forecasting from the closed opportunity. Be sure that the check box is cleared for all items that you do <i>not</i> want to include in forecasting.

Items from a closed - lost opportunity that remain in the forecast show up as leaks.

Using Tasks on a Mobile Device

This section illustrates how to manage Tasks on a mobile device.

Pages Used to Manage Tasks

Page Name	Object Name	Navigation	Usage
My Task or Task Detail	RSFM_TASK	<ul style="list-style-type: none"> • Sales, Sales Dashboard, Select Task, My Task • Sales, Leads Click the Tasks tab, Click the icon for a Task, Task Details • Sales, Opportunities Click the Tasks tab, Click the icon for a Task, Task Details • Sales, Tasks, Task Details 	View and manage task details.

Managing Tasks on a Mobile Device

Access the My Task Detail page.

My Task

Subject:

Comments:

Task Type:

Status:

***Start Date:** **Start Time:**

End Date: **End Time:**

Assigned To:

Lead: [Computers for IMC](#)

My Task Detail page on a laptop computer

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

The mobile Task component:

- Provides a separate menu option to view tasks apart from their associated leads and opportunities.

- Provides access to tasks through the Sales Dashboard.
- Provides links to the associated lead or opportunity for each task.
- Provides no task deletion.

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

- Provides no task addition.

Working with Forecasts on a Mobile Device

This section illustrates how to manage Forecasts and export Forecast subtotals.

Pages Used to Manage Forecasts

Page Name	Object Name	Navigation	Usage
Revenue Forecasts	RSFM_REV_ENTER	Sales, Forecasts, Select a Forecast, Revenue Forecasts.	View and manage revenue forecasts.

Using Forecasts on a Mobile Device

Access the Revenue Forecasts page.

Revenue Forecasts | Subtotals | Chart | Export Subtotals

Forecast: 2002-6JUN **Time Frame:** 2002-JUNE
Forecast Locked: No

Begin Date: 06/01/2002 **End Date:** 06/30/2002
Reforecast

Currency: US Dollar
Forecast Total: 360,000.00

Forecast User		
Sales Person	Date	Submitted
Peterson, Frank T	02/27/2003	<input type="checkbox"/>

Forecast Details						
Opportunity	Forecast Type	Confidence %	Close Date	Currency	Local Rev	Revenue
Valley Health Hardware	Open	80	06/13/2002	US Dollar	210,000.00	210,000.00
Global Payment hardware	UpRevPosc	75	06/19/2002	US Dollar	150,000.00	150,000.00

Add

Revenue Forecasts page on a laptop computer

The mobile Forecast component:

- Displays only the revenue forecast.
- Reflects all currencies established as part of the data synchronization rules.
- Provides flexibility in editing the data.

In the standard Forecast component, you can't change the data once you've selected the Submitted check box and saved it. In the mobile application, you can clear the check box and change the data, as long as you haven't performed synchronization

- Provides detail of forecast data for individual salespeople.

Exporting Forecast Subtotals

Forecast subtotals can be exported to an Excel spreadsheet by accessing the Export Subtotals page and clicking on the Export Subtotals icon.

CHAPTER 7

Using PeopleSoft Mobile FieldService

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

- Work with PeopleSoft Mobile FieldService on a mobile device.
- Use My Service Order on a mobile device.

Understanding Transactions in Mobile FieldService

PeopleSoft Mobile FieldService delivers a condensed version of My Service Orders to your mobile device.

Object	Actions Available on Mobile Devices
Service Order Detail.	<ul style="list-style-type: none">• View service order detail.• Change status or priority.• Select a line.
Service Order Line Detail.	<ul style="list-style-type: none">• View or update status or priority.• Edit activity name, or view detail for activity.• View or edit estimated start date, end date, start time, end time.• View or edit actual start date, end date, start time, end time.• Navigate to time, expense, or material information.
Assignments.	View assignments.
Time.	View or enter time information.
Expenses.	View or enter expense information.
Material.	View or enter material information (add or remove).

Working with PeopleSoft Mobile FieldService on a Mobile Device

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

The mobile version of My Service Orders presents a list of service orders by service order ID:

- You can select a service order to view or edit by clicking the link of the service order ID.
- You can use a date and time picker to select the date and time.
- You cannot create a service order on the mobile device.
- You cannot reject a service order that has been accepted.
- There is no toolbar on the mobile pages.

See Also

PeopleSoft FieldService 8.8 SPI PeopleBook, Working with My Service Orders

Using My Service Order on a Mobile Device

Access the Service Order Detail page.

Service Order Detail
Lines

Service Order ID:

Company:

Contact:

Phone:

Site:

Service: [PM for A/C](#)

Agreement:

Warranty Name:

Address 1:

Address 2:

City:

Postal:

Status: ▼

Priority: ▼

Line:

Renewal

Number:

Country:

State:

Service Order Detail page on a laptop computer

Because mobile devices have limited processing power, storage capacity, and display space, mobile computing is different from online tethered computing. On mobile devices, the Service Order Detail page:

- Does not allow you to change the contact on the mobile device.
- Does not allow you to change the address on the mobile device.
- Provides no troubleshooting on the mobile device.
- Provides no approval functionality on the mobile device.
- Provides no service order line creation on the mobile device.

Your business process workflow may send a notification if the service order status does not change by a specified time and date. Synchronize regularly to update workflow.

Service Order Line Detail
Assignments

Service Order ID: [0000000048](#)

Line:

Status:

Priority:

Activity Name:

Start Date: **Start Time:**

End Date: **End Time:**

Estimated Start Date: **Estimated Start Time:**

Estimated End Date: **Estimated End Time:**

Estimated Hours:

Actual Start Date: **Actual Start Time:**

Actual End Date: **Actual End Time:**

Time: [100000043](#)

Expense: [EXP0000034](#)

Material: [00000431](#)

Billable Flag:

Service Order Detail page

Time Detail

Time:

Return To Service Order: [0000000048](#)

Service Order Line:

Time Entry Lines	Find View All First 1-1 of 1 Last				
Time Line	Start Date	Start Time	End Date	End Time	
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	-

Time Detail page

Expense Detail

Expense:

Return To Service Order: [0000000048](#)

Expense Entry Lines Find | View All | First 1-1 of 1 Last

Expense Line	Description	Total Amount
<input type="text" value="1"/>	<input type="text"/>	0.000

Expense Detail page

Material Detail

Material:

Return To Service Order: [0000000048](#)

Material Lines Find | View All | First 1-1 of 1 Last

Material Line	Item ID	Quantity Required	Quantity Ordered
<input type="text" value="1"/>	<input type="text"/>	0.0000	0.0000

Material Detail page

Service Order Line Detail | **Assignments**

Service Order ID: [0000000048](#)

Line:

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

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

Assignments page

Note. Because mobile devices have limited processing power, storage capacity, and display space, mobile computing is different from online tethered computing.

The mobile Service Order Line Detail page:

- Provides direct links from the Service Order Line Detail page to the Time, Expense, and Material pages.
- Provides direct links from the Material, Expense and Time pages to the Service Line Detail page.
- Provides for material that is used or removed.
- Provides no material autoreceiving.
- Provides no material ordering or receiving.

- Provides no material summary view.
- Line number for material, time, and expense are automatically generated during synchronization.
- Provides no item availability, requisition workbench, item substitute inquire, item balance by group member , item balance by business unit, or item definition.
- Provides no line approval.
- Provides no deletion of service order lines on the mobile device.

When you specify items on the Material Detail page, be sure that the item ID and product ID are consistent, as item IDs may be duplicated across different setIDs.

See Also

PeopleSoft CRM 8.8 SPI Services Foundation PeopleBook, Tracking Time Spent on Service Orders and Cases

PeopleSoft FieldService 8.8 SPI PeopleBook, Tracking Expenses Associated with a Service Order

PeopleSoft FieldService 8.8 SPI PeopleBook, Managing Service Order Material Requirements

PART 3

PeopleSoft Mobile Sales for WAP Phones

Chapter 8

Understanding PeopleSoft Mobile Sales for WAP Phones

Chapter 9

Setting Up PeopleSoft Mobile Sales for WAP Phones

Chapter 10

Using PeopleSoft Mobile Sales for WAP Phones

CHAPTER 8

Understanding PeopleSoft Mobile Sales for WAP Phones

PeopleSoft Mobile Sales for WAP Phones is part of the PeopleSoft CRM Mobile Sales solution. PeopleSoft Mobile Sales for WAP Phones enables your mobile sales professionals to access customer information from the PeopleSoft CRM Sales database and display it on their WAP-enabled devices.

This chapter discusses:

- Features.
- Prerequisites for Implementation.

Features of PeopleSoft Mobile Sales for WAP Phones

This section discusses how users of PeopleSoft Mobile Sales for WAP Phones can interact with:

- Contacts
- Companies
- Tasks
- Leads
- Opportunities

Contacts

PeopleSoft Mobile Sales for WAP Phones grants mobile users access to key contacts or contacts.

Your users click the Contacts link from the PeopleSoft CRM main menu screen and are prompted to enter the first few characters of the contact's last name. A list of contacts is returned that matches the character string provided. From the Contact List screen, mobile users can access a contact's contact information. They can either make a telephone call using one of the numbers or edit the contact information.

See Also

[Chapter 10 , Using PeopleSoft Mobile Sales for WAP Phones, Viewing or Modifying Contact Information, page 80](#)

Companies

PeopleSoft Mobile Sales for WAP Phones supports users, such as brokers or sales contacts who might represent multiple customers (or companies).

When mobile users click the Companies link from the PeopleSoft CRM main menu screen, they are presented with a SetID filter menu. This filter limits the search results to only those companies that are in the business unit associated with the selected SetID. After selecting a set ID, the user can further limit the search results by entering the first few characters of the company name.

Note. When mobile users represent multiple business units within a particular company, they can view and select those different business unit entities from the SetID Filter screen.

See Also

[Chapter 10 , Using PeopleSoft Mobile Sales for WAP Phones, Searching for Companies, page 82](#)

Tasks

From the Tasks link on the PeopleSoft CRM main menu screen, mobile users can view their PeopleSoft CRM task calendars. They can drill down to view details, such as time of appointment, contact name, and type of task. A direct link is provided if the task is associated with a lead or opportunity.

See Also

[Chapter 10 , Using PeopleSoft Mobile Sales for WAP Phones, Viewing Tasks, page 84](#)

Leads

The Leads link takes mobile users to the Leads Detail screen where they can view or edit a lead's status, type, and rating. From there, they can drill down to view company details, contacts, and opportunities.

See Also

[Chapter 10 , Using PeopleSoft Mobile Sales for WAP Phones, Viewing or Modifying Leads, page 85](#)

Opportunities

The Opportunities screen enables mobile users to remotely manage their sales opportunities. They can either view or edit fields, such as Status, Estimated Revenue, Confidence, Estimated Close Date, Forecast, and Forecast Type.

See Also

[Chapter 10 , Using PeopleSoft Mobile Sales for WAP Phones, Viewing or Modifying Opportunities, page 87](#)

Implementation Requirements

This section discusses the following requirements for PeopleSoft Mobile Sales for WAP Phones:

- Platform requirements
- Service provider requirements

Platform Requirements

The variety of wireless devices available in today's marketplace and the speed at which the technology changes require that our documentation be general when referring to wireless devices as platforms for PeopleSoft Mobile Sales for WAP Phones.

PeopleSoft Mobile Sales for WAP Phones requires that:

- The wireless devices on which you intend to run the application must be WAP compliant.
- Digital wireless telephones must be minimally equipped with the Openwave Systems, Inc. 3.1 microbrowser, supporting WML 1.1 or later.

Note. For a list of PeopleSoft supported mobile browsers, refer to the "Supported Platforms" section on *Customer Connection*.

See Also

[Chapter 10 , Using PeopleSoft Mobile Sales for WAP Phones, page 75](#)

Service Provider Requirements

Before implementing PeopleSoft Mobile Sales for WAP Phones, you must establish wireless data service with an appropriate wireless service provider.

CHAPTER 9

Setting Up PeopleSoft Mobile Sales for WAP Phones

This section lists prerequisites for implementation and discusses how to:

- Define WAP terminology.
- Use permissions.

Understanding PeopleSoft Mobile Sales for WAP Phones Setup

These prerequisites are a combination of post-installation tasks and tasks related to activating certain features in PeopleSoft CRM Mobile Sales for Wireless Application Protocol (WAP) Phones.

Note. Installation information is provided in the PeopleSoft CRM Installation Guide, which is available on Customer Connection.

The following is a list of the requirements and recommendations:

- Include PeopleSoft CRM Sales and PeopleSoft CRM Mobile Sales as part of your installation.
- Ensure that the wireless device on which you intend to run the PeopleSoft Mobile Sales for WAP Phones application supports WAP capabilities.
- Your PeopleSoft Mobile Sales for WAP Phones must be installed on a Web server that has at least one port open to the Internet-

This enables the WAP gateway to locate the Web server from the Internet. The WAP gateway is usually located at and operated by your wireless service provider.

- Properly define your permissions.

Note. When you define user IDs and passwords for your mobile sales users, consider keypad usability. For example, a user ID or password that contains special characters, extensive use of upper and lower character cases, or alphanumeric combinations can significantly lengthen the sign-on process. It is recommended that the user IDs and passwords assigned to your WAP users be all lower case. Because alpha character input on most WAP devices uses the “triple tap” technique, you must tap the 2 key three times when you enter the letter “c”. When you assign user IDs, make sure you follow this keypad method.

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See Also

[Chapter 10 , Using PeopleSoft Mobile Sales for WAP Phones, Display Controls and Search Parameters, page 76](#)

[Chapter 10 , Using PeopleSoft Mobile Sales for WAP Phones, Navigation, page 75](#)

PeopleSoft Sales 8.8 SP1 PeopleBook, Setting Up Sales Security and Personalization, Understanding Sales Users

PeopleSoft Sales 8.8 SP1 PeopleBook, Working with Territories

Understanding WAP Terminology

This section defines terms related to WAP terminology.

Wireless Application Protocol (WAP) A communications protocol and application environment for the deployment of information resources, advanced telephony services, and Internet access from mobile devices.

Wireless Markup Language (WML) A structured Extensible Markup Language (XML) document template used to define the content that appears on a WAP-compliant mobile device. In HTML, one page is loaded and appears in a browser. A WAP device, on the other hand, does not load a page but instead a deck of cards.

Card A WML document that contains both content and navigational controls. A WAP device displays only one card at a time.

Note. Note. In this document, PeopleSoft refers to cards as screens.

Deck A collection of cards that are sent to the WAP browser as a single unit. A compiled deck cannot exceed approximately 1400 characters.

Using Permissions

This section discusses delivered permission lists and discusses how to modify them.

Understanding Delivered Permission Lists

Two WAP-related permission lists are delivered with the application. Each permission list identifies PeopleSoft Mobile Sales for WAP Phones Web libraries (iScripts) and component interfaces that the user is authorized to access. Permission lists are assigned to roles and roles are assigned to users.

The two delivered PeopleSoft Mobile Sales for WAP Phones permission lists are CRWS1000 and CRWS1100:

- CRWS1000

This permission list contains the permissions necessary to access Tasks, Companies and Contacts. It also contains the permissions necessary to edit Contacts.

- CRWS1100

This permission list contains all CRWS1000 permissions, plus the ability to access and update leads and opportunities. It provides complete access to all features.

Note. By default, CRWS1100 is assigned to the Field Sales Rep and Sales Manager roles, while CRWS1000 is assigned to the Field Service Engineer role. When you set up these roles, each one automatically obtains the related set of permissions.

Modifying Permission Lists

To modify user access to specific PeopleSoft Mobile Sales for WAP Phones functions, either:

- Modify the role definition by removing or adding permission lists, or
- Modify the permission lists by enabling or disabling Web libraries.

Each user that signs into PeopleSoft Mobile Sales for WAP Phones then sees the appropriate menu structure based on the security that you have defined.

To create a permission list that can view everything but is not allowed to update anything:

- Copy an existing list.
- Disable the edit transactions in the Web library portion of the permission list.

To disable one or more of the main menu links in PeopleSoft Mobile Sales for WAP Phones:

- Make a copy of the delivered permission list.
- Make changes by either granting or denying access for the selected Web library in either permission list.

For example, to remove the Tasks option from PeopleSoft Mobile Sales for WAP Phones remove access for the iScript_taskSearch function.

Note. When modifying a permission list, you are changing access for all users who are assigned to roles to which the permission list is linked.

See Also

PeopleTools PeopleBook: PeopleTools Security

CHAPTER 10

Using PeopleSoft Mobile Sales for WAP Phones

This chapter provides an overview of PeopleSoft CRM Mobile Sales for Wireless Application Protocol (WAP) Phones and discusses how to:

- Sign in to PeopleSoft Mobile Sales for WAP Phones.
- View or modify Contact information.
- Search for companies.
- View tasks.
- View or modify leads.
- View or modify opportunities.
- Sign out.

Note. PeopleSoft recommends that your wireless device come equipped with the Openwave microbrowser software version 3.1 or later.

See Also

[Chapter 8 , Understanding PeopleSoft Mobile Sales for WAP Phones, Platform Requirements, page 69](#)

Understanding PeopleSoft Mobile Sales for WAP Phones

In this section, we discuss:

- Navigation.
- Display controls and search parameters.
- Wireless telephone keypad usage.

Navigation

The following navigational tools within PeopleSoft Mobile Sales for WAP Phones help you to move quickly from screen to screen.

Links and Numbers

Appear throughout the application screens. Some devices display links in brackets: [*link name*]; however, links might not be bracketed in every microbrowser. Use your scroll or arrow key to move the cursor to a link, and click the OK or Yes button to access the link.

Other devices display a number next to the link. Optionally, you can use your keypad to select the number of the link that you want to access.

- More** Indicates that additional items are available. Click this link for the next set of items to appear. If your phone uses a WAP browser from Openwave then you can use the “9” as a hot key to go to the next page of items.
- Sign Off** Prompts you to confirm that you want to end your PeopleSoft Mobile Sales for WAP Phones session. If you click OK, the Sign-in screen appears.
- Back** Usually appears in the bottom right corner of the screen unless overridden by the microbrowser’s character control button in a data entry screen. Also, if you are positioned on a hyperlink the back button may not be available. The Back button returns you to the previous screen. Most phones also have a dedicated (hardwired) back button.

Note. Note. The Back button does not appear on some phone browsers if an input field is present. In this case, use the dedicated (hardwired) back button.

Display Controls and Search Parameters

PeopleSoft Mobile Sales for WAP Phones predefines the total allowable number of search items that appear and the total number of rows to return. If your search yields more than 300 results, narrow your search criteria.

Note. Make sure that you do not exceed the maximum allowable size for a single Wireless Markup Language (WML) deck when determining the number of search items to appear. Increasing the total number of rows to return enables you to scroll through a larger number of retrieved entries but slows performance. This might result in a compilation error if the deck size exceeds the maximum allowable characters, which is about 1400.

If the system can return only one record in response to your request, it displays the record immediately instead of requiring you to select it from a list.

Wrapping Text

Some text in PeopleSoft Mobile Sales for WAP Phones might exceed the number of character spaces available for display on your device and wrap around to the next line. Text might also scroll horizontally to display the entire line when the cursor is positioned above the line. When the cursor is positioned on a field that is wrapped, the field will automatically scroll back and forth so that you can see all of the data in the field. To stop the automatic scrolling, just move the cursor to another field.

Return Codes

Return codes on the phone generally take the following form: <message> (18050, y)

Parameter	Description
<message>	Description of the situation encountered.

Parameter	Description
18050	PeopleSoft Mobile Sales for WAP Phones message set.
Y	PeopleSoft Mobile Sales for WAP Phones message number.

Note. You can find descriptions of these messages in the Message Catalog. Sign in to PeopleSoft CRM with a user ID that is authorized to view the Message Catalog in PeopleTools. You can change the message string.

See Also

PeopleTools PeopleBook: PeopleSoft Integration Tools and Utilities

Wireless Telephone Keypad Usage

To use the PeopleSoft Mobile Sales for WAP Phones, you must understand the functionality of your wireless telephone's keypad.

Note. Because different Web-enabled cellular phones have different keypad designs and microbrowser functionality, we discuss keypad usage in general terms. Consult your device's documentation for further details.

On most phones, you can enter a letter by pressing the corresponding key until the character appears. For example, to enter the letter "e", press 3 twice in quick succession. To enter the letter "z", press 9 four times in quick succession. Usually, by default, the first letter of a word is capitalized and the letters following are lowercase. When you enter a character using the phone keypad, the character remains highlighted for a moment before the cursor advances automatically to the next space. Continue tapping the key until the character that you want appears. You can wait for the cursor to advance automatically, or press the right arrow key (if available) to advance to the next space.

When presented with an entry field, use your device's character control button to gain access to additional characters. Some common options include:

ALPHA or alpha	Uppercase or lowercase alphabetic characters.
NUM	Numeric characters.
SYM	Sets of special symbols.
	SMART or smart
	Uppercase or lowercase alphabetic characters followed by the numerals and special symbols available in a single scroll of each key.

Note. Screenshots in the documentation might not reflect the application's exact appearance on your device. This is due to the high number of wireless devices available on the market, and the variety of screen sizes. This documentation shows all selections available on a particular screen. On the actual device, you might have to scroll down to see all available selections.

Signing In to PeopleSoft Mobile Sales for WAP Phones

The sign-in procedure includes application security authentication. PeopleSoft Mobile Sales for WAP Phones verifies user information so that sales users see only the leads and opportunities that they have been authorized to see:

- Non-sales users can see Contacts, companies, and task information only.
- Sales users who have the role of manager can view all the sales-related information for the sales users who report to them.

Note. PeopleSoft Mobile Sales for WAP Phones can mirror the settings of the PeopleSoft CRM Sales application. Any display preferences must be established in the CRM Sales application.

This section discusses how to:

- Sign in to PeopleSoft Mobile Sales for WAP Phones.
- Use the PeopleSoft CRM screen.
- Use the Support Menu screen.

Signing in to PeopleSoft Mobile Sales for WAP Phones

To sign in to PeopleSoft Mobile Sales for WAP Phones:

1. Enter the predefined URL for PeopleSoft Mobile Sales for WAP Phones in your wireless device's microbrowser to initially access the PeopleSoft Sign-in screen. Once you reach the sign-in screen it is recommended that you bookmark that card to avoid having to enter that long URL more than once.
2. Select LOGIN to confirm that you want to access PeopleSoft Mobile Sales for WAP Phones.
3. (Optional) Select LANG (language) to access the Language Selection screen.

Select the language that you want to define as your preferred language for the Sign-in screen. To return to the Sign-in screen without changing the language, select Link or click the phone's Back button.

4. Enter a valid User ID and Password when prompted to do so.

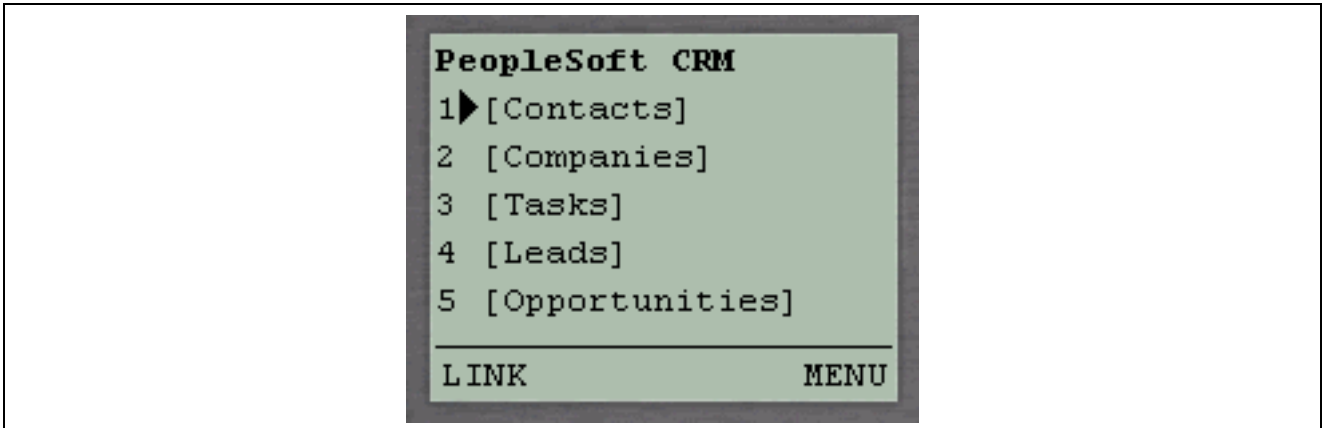
User IDs and passwords are case sensitive.

If an error occurs during the login process, an error message appears. Depending on the error type, you might be prompted to select LOGIN to return to the Sign-in screen, or you might be returned to the Sign-in screen. On most phones, scroll to see the entire error message.

After you successfully sign in, the PeopleSoft CRM screen appears.

Using the PeopleSoft CRM Screen

The PeopleSoft CRM screen is the main screen in the PeopleSoft Mobile Sales for WAP Phones application.



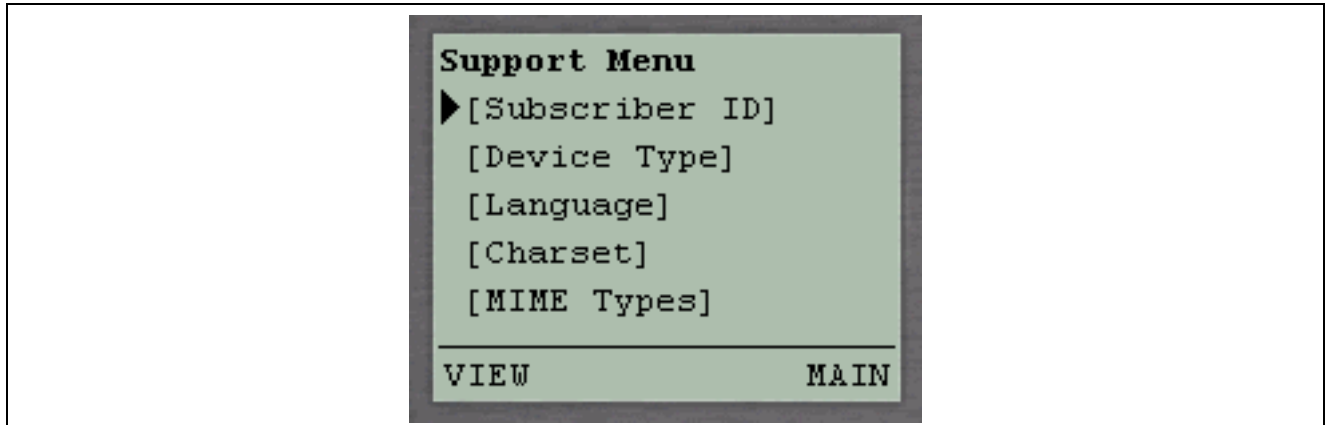
PeopleSoft CRM screen

Select any one of the following options, and click OK.

- | | |
|----------------------|--|
| Contacts | Select to access the screen where you can view and modify any Contact defined in the PeopleSoft CRM system. |
| Companies | Select to access the SetID Filter screen, where you can do one of the following: <ul style="list-style-type: none"> • Restrict your company (customer) search by SetID to certain business units. • • Search all companies (customers) in the PeopleSoft CRM system. • |
| Tasks | Select to access the screen, where you can view your tasks. |
| Leads | Select to access the Leads screen, where you can view or modify your sales lead information. |
| Opportunities | Select to access the Opportunities screen, where you can view or modify your sales opportunities. |
| Sign Out | Select to sign out. |

Using the Support Menu Screen

You can access the Support Menu screen from the Mobile Sales screen with the options key on the right (this is usually MENU). The Support Menu provides information that might be useful when contacting PeopleSoft technical support.



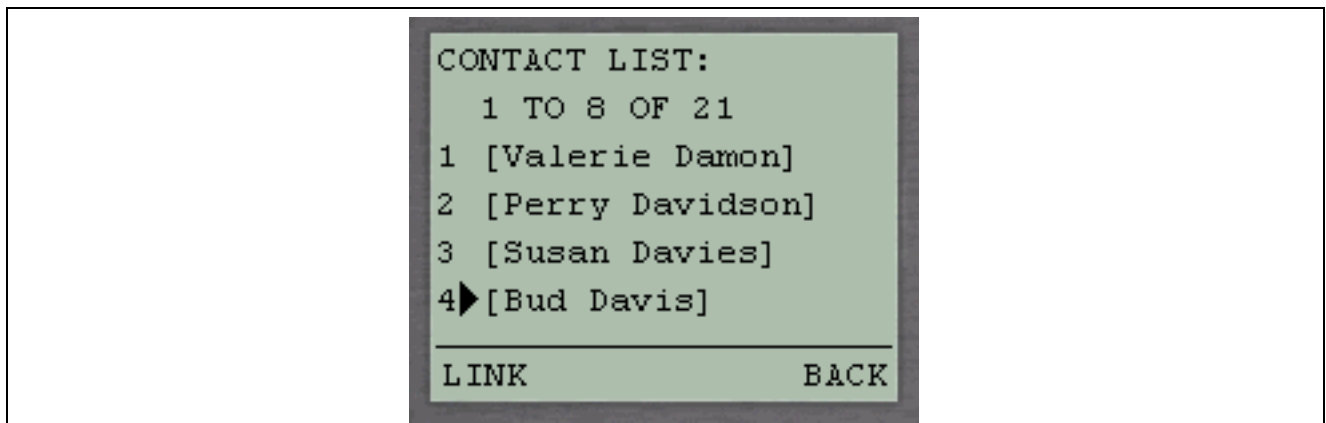
Support Menu screen

Select any one of the following options, and click VIEW to see the associated information:

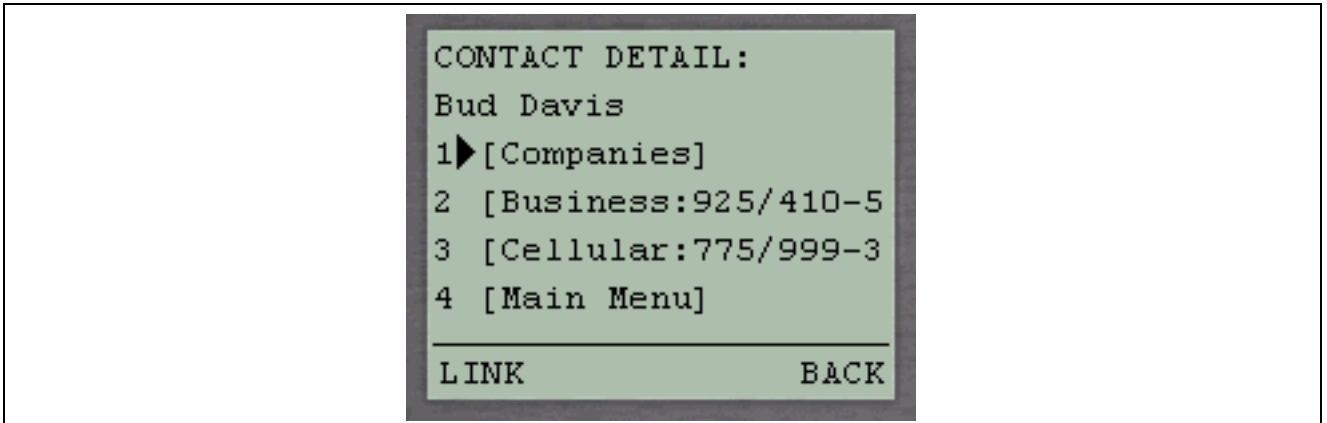
Subscriber ID	Unique identifier associated with the phone user. This ID helps identify log entries associated with a particular user.
Device Type	Browser type and version and the WAP gateway type and version.
Language	Language defined for the phone (not as defined for the application). Phones purchased in different countries might have different languages defined.
Charset (character set)	Character set used by the phone. This set helps diagnose problems related to the phone's display of certain characters.
MIME Types (Multipurpose Internet Mail Extensions types)	MIME types supported by the phone, which should include WML.

Viewing or Modifying Contact Information

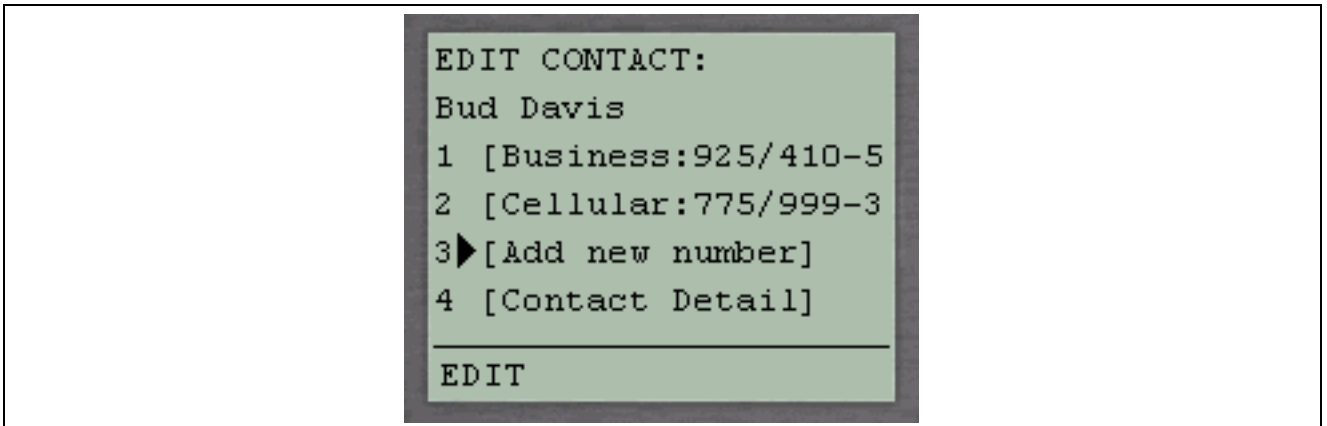
Users manage Contact information using the Contact List screen, the Contact Detail screen, and the Edit Contact screen.



Contact List screen



Contact Detail screen



Edit Contact screen

To view Contact information:

1. Select Contacts from the PeopleSoft CRM screen.

The Contact Search screen appears.

2. Enter the Contact's full name to retrieve details for this Contact, or enter a partial last name to retrieve a list of matching Contacts.

The Contact List screen displays a list of Contacts that meet the specified search criteria. Select the desired Contact's name to view the details for that Contact.

Note. If there is only one Contact, the system immediately displays the Contact Detail screen for that Contact.

3. Select a Contact name from the list of names to view a Contact's details.

There are several possible views of the Contact Detail screen shown above:

- The Contact has multiple associated companies, in which case a Companies link appears.

The destination screen for the Companies link is the Company List screen.

- The Contact has a single associated company, in which case the name of the company appears as a link.

4. Click the link to view the company details.

If the Contact has no associated companies, only the Contact's business number appears as a link.

If the Contact is not associated with a company and no phone numbers have been assigned, then the only item that appears is the Contact's name.

To modify Contact information:

1. Access the Contact Detail screen as described in the previous steps.
2. Scroll down (or up) so that the black cursor arrow disappears entirely from the screen, and click the EDIT button.

The LINK button changes to the EDIT button; you are now in edit mode. The Edit Contact screen appears:

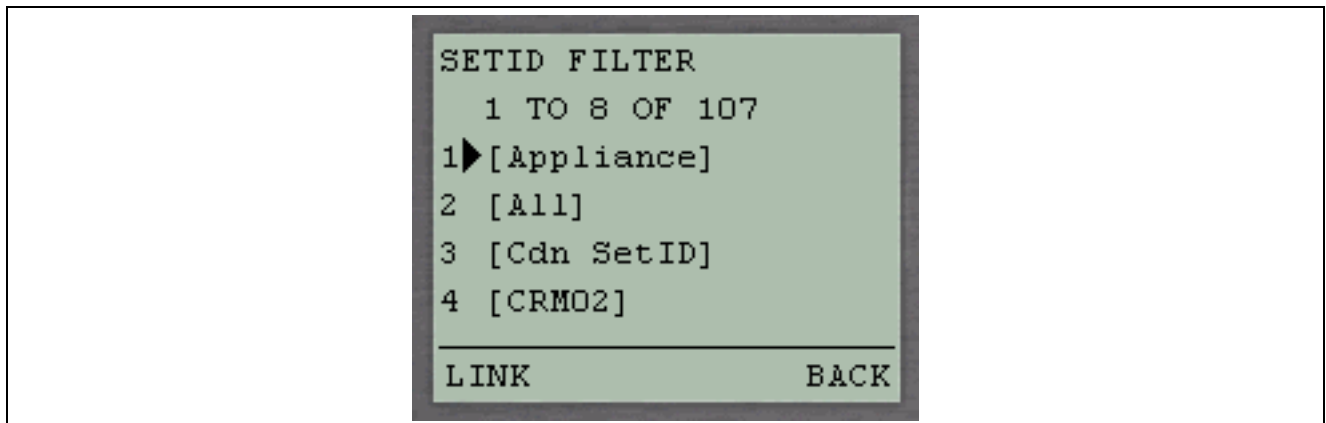
Business, Cellular, Home, FAX Allows you to edit the phone number type, including extension (if desired), and country code. Save your changes.

Add new number Allows you to add a new phone number. Select the phone type, enter the information, and save your addition.

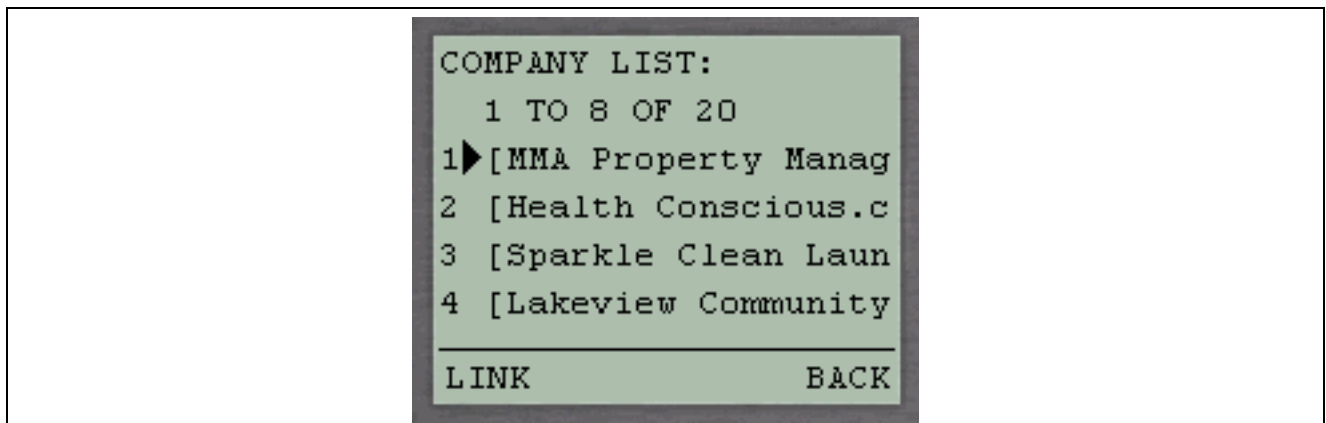
Note. When a phone number is changed or added, it is effective-dated using the current date.

Searching for Companies

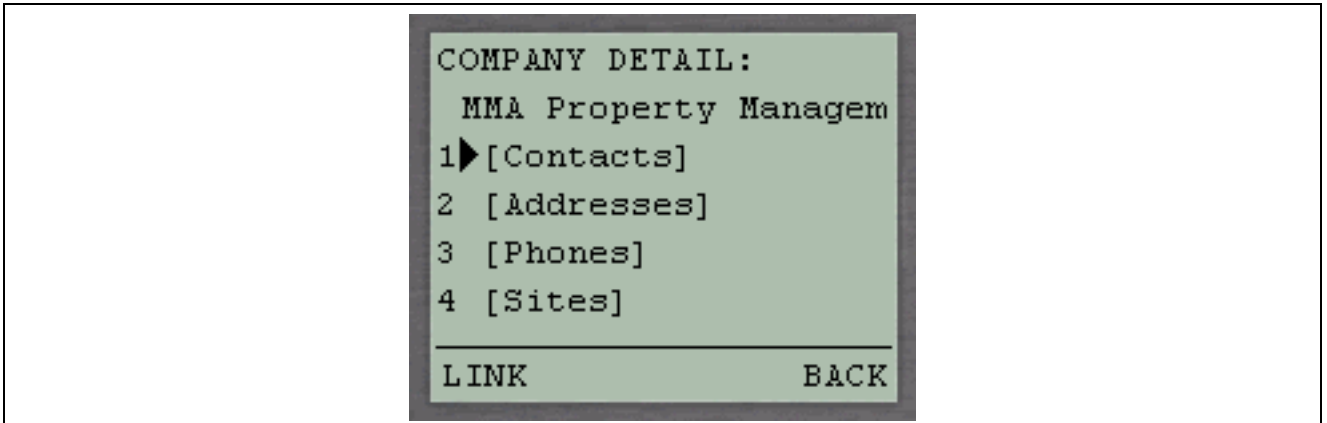
Users manage company information using the SetID Filter screen, the Company List screen, and the Company Detail screen.



SetID Filter screen



Company List screen



Company Detail screen

To locate company information:

1. Select Companies from the PeopleSoft CRM screen.

The SetID Filter screen appears. The first selection is always the mobile user's default SetID. The second item is always All and, when selected, enables an enterprise-wide search across all SetIDs. The remaining SetIDs are sorted in ascending order by the short description.

2. Select the applicable SetID to access the Company Search screen.
3. Enter the full name of the company to retrieve details for that company, or enter a partial name to retrieve a list of matching companies.

The Company List screen displays a list of companies that meet the specified search criteria.

Note. If there is only one company, the system displays the Company Detail screen for that company.

4. Select the desired company to view the details for that company.

The following options appear on the Company Detail screen:

Contacts	Takes you to the Contact List screen when multiple Contacts are defined for this company. If only one Contact is defined for the company, this link takes you directly to the Contact Detail screen.
Addresses	Displays the company nickname.
Main Menu	Takes you to the PeopleSoft CRM main menu screen.

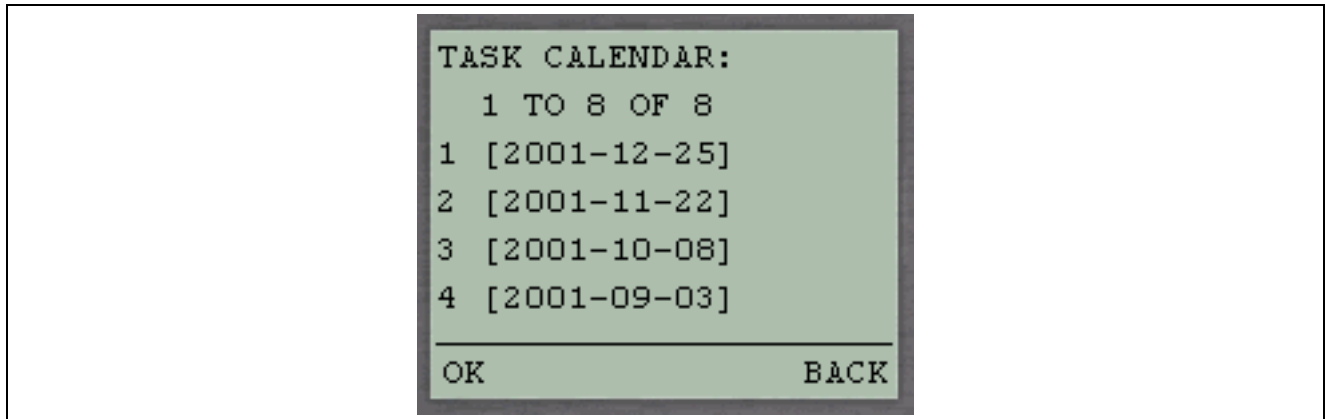
See Also

PeopleSoft CRM 8.8 SPI Application Fundamentals PeopleBook, Defining Company Business Objects

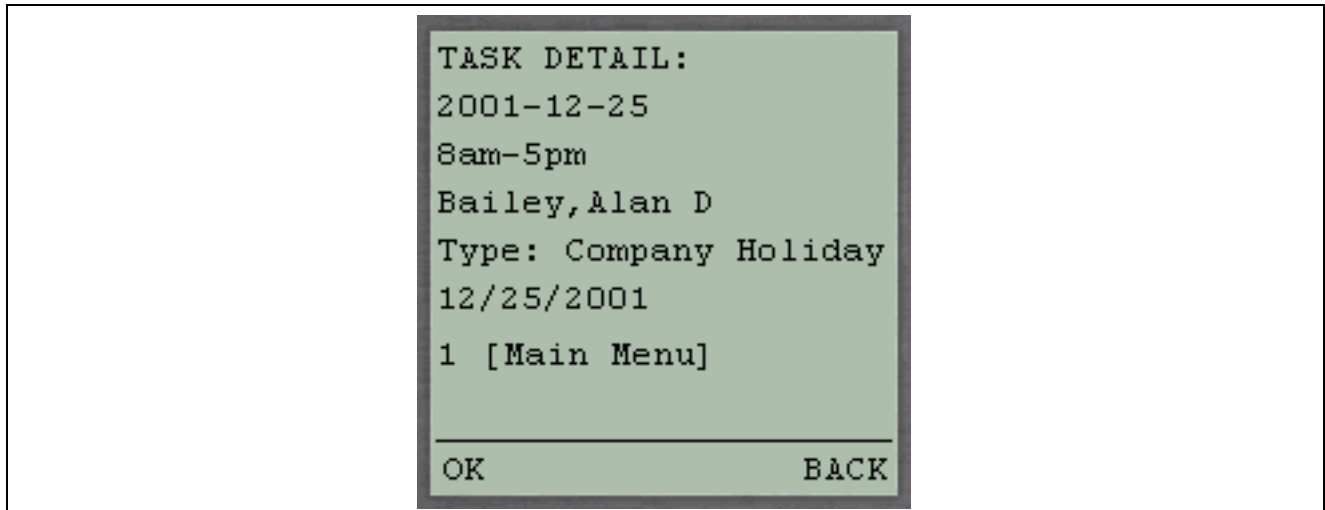
Viewing Tasks

In PeopleSoft CRM, every worker defined in the system is associated with a monthly and daily calendar. Workers and managers can manually update the calendars to reflect daily tasks. In Peoplesoft CRM Sales (WAP), system events can automatically update sales Contacts' calendars to reflect leads and opportunities. Similarly, in PeopleSoft CRM FieldService, system events can automatically update technicians' calendars to reflect service order assignments.

Users manage task information using the Task Calendar screen and the Task Detail screen.



Task Calendar screen



Task Detail screen

To view task information:

1. Select Tasks from the PeopleSoft CRM screen.

The Task Calendar screen displays all dates for which a task has been defined in the PeopleSoft CRM System.

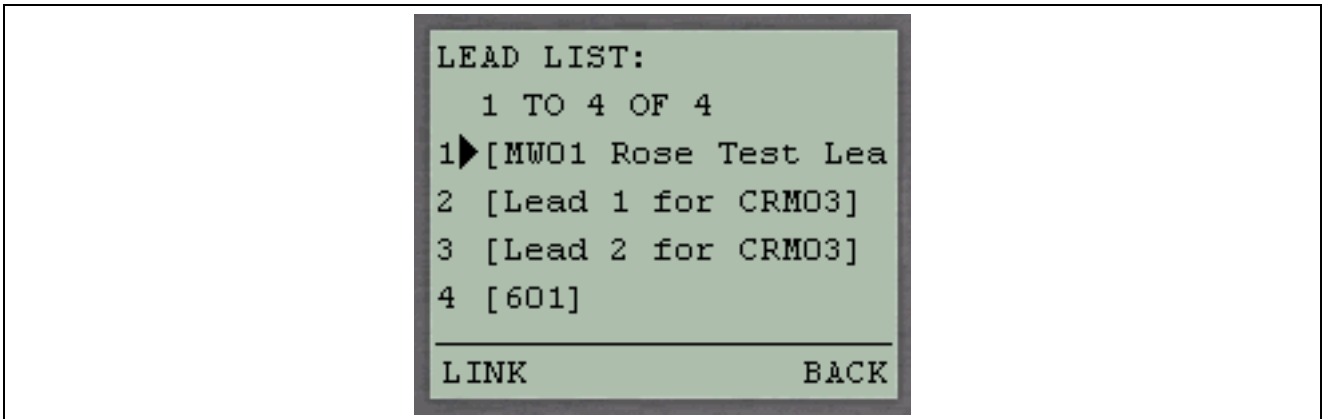
2. Select a specific date to access the Task Detail screen.

Here you can view the date, time, Contact, event type, and date of the task.

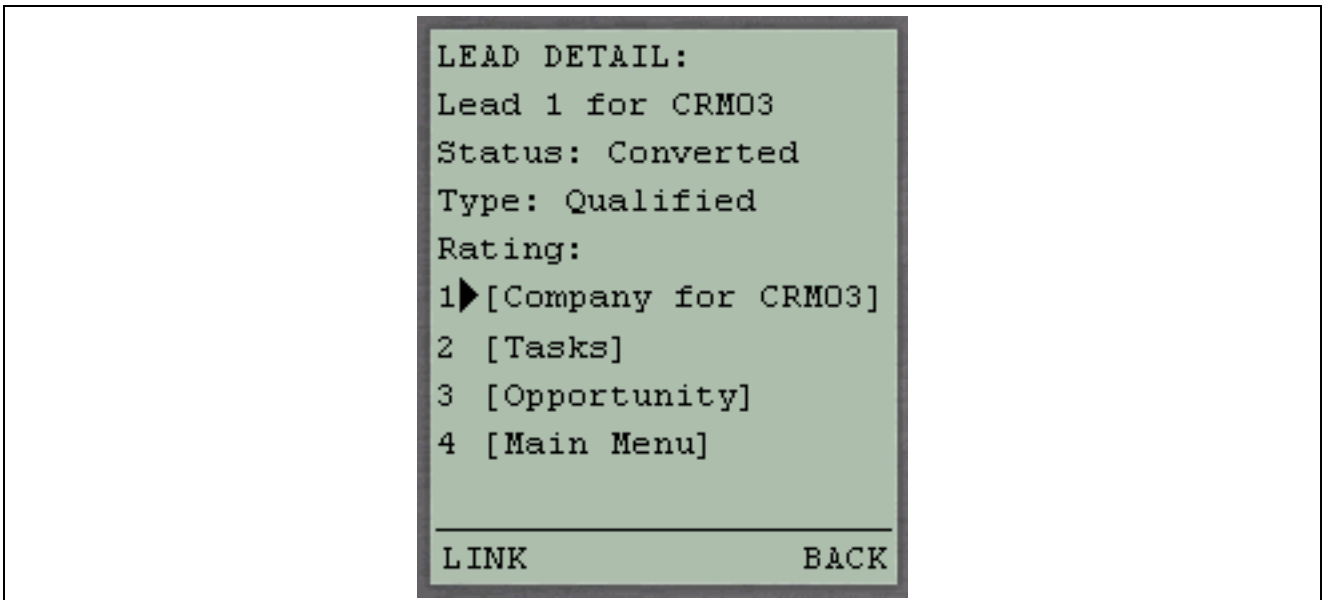
Viewing or Modifying Leads

You can modify lead information such as Type and Status. You can also convert leads to opportunities directly on your mobile phone.

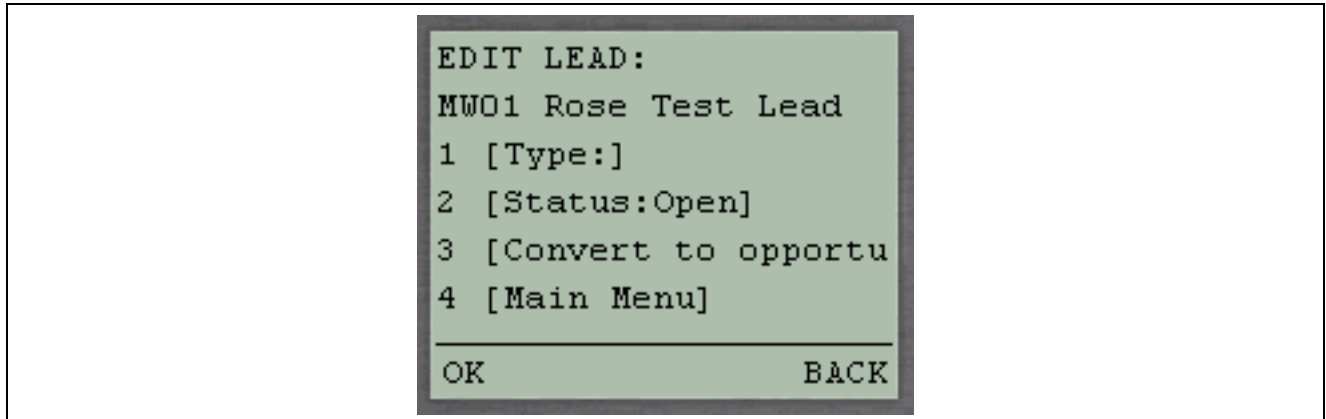
Users manage lead information using the Lead List screen, the Lead Detail screen, and the Edit Lead screen.



Lead List screen



Lead Detail screen



Edit Lead screen

To view leads:

1. Select Leads from the PeopleSoft CRM screen.

By default the list of leads that appear for each user will be: Leads as Manager, Leads as Owner, Leads as Task Assignee, New Leads as Owner, Team Member Leads, and Team Member Manager Leads. The leads are additionally filtered based on the status field. Only leads with status of Accepted, Deferred, Imported, New, Open, Referred or Working will be displayed in the list. If you would like to modify your own search filter for the Lead list transaction you can use the configurable search tool in the HTML version of the Lead List transaction. To do this, sign-in to the CRM application using your HTML browser and access the Sales->Leads->Lead List transaction. Once you are in Lead List, configure the search the way that you would like it to behave in the WAP client then save the search using the name "WAP." The next time that you access the Lead option from the WAP Sales main menu, this new saved search filter will be used to retrieve your Lead List.

When you select a lead from the list, the Lead Detail screen appears.

Note. If there is only one lead, you need not select from a list because the Lead Detail screen automatically appears.

2. Access any related information.

The Lead Detail screen links to the associated Contacts and company. If there are any tasks associated with the lead, a task link appears. If a lead has been converted to an opportunity, then it displays a link to the opportunity.

From the Lead Detail screen, you can view lead details such as Status, Type, and Rating.

To modify lead information or convert a lead to an opportunity:

1. Access the Lead Detail screen as described in the previous steps.
2. Scroll down (or up) so that the black cursor arrow disappears entirely from the screen, and click the EDIT button.

The LINK button changes to an EDIT button; you are now in edit mode. The Edit Lead screen appears:

Type	Allows you to edit the lead type.
Status	Allows you to change the status of the lead.
Convert to opportunity	Converts this lead to an opportunity.

Main Menu

Return to PeopleSoft CRM screen

See Also

PeopleSoft Sales 8.8 SPI PeopleBook, Managing Sales Leads and Opportunities

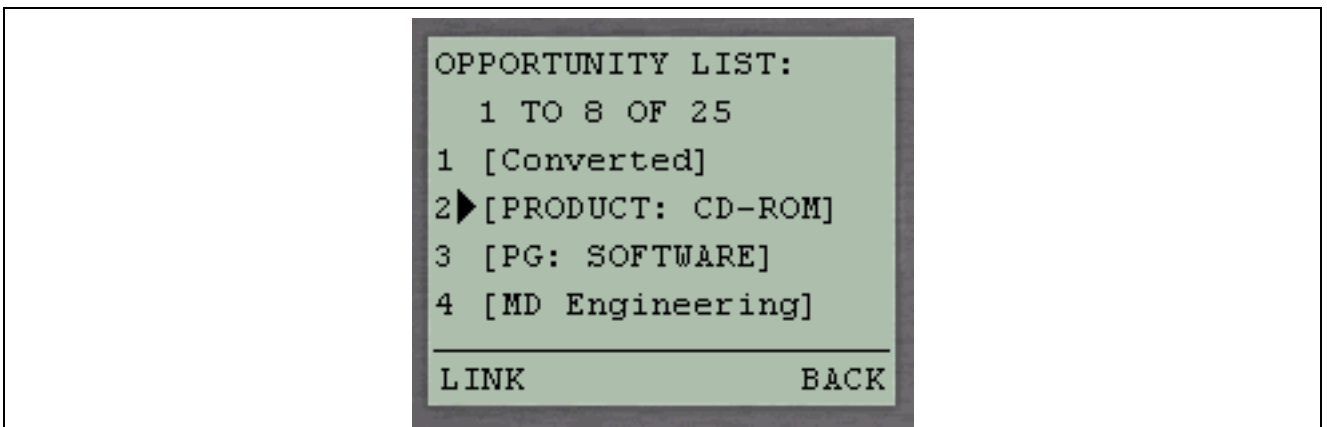
Viewing or Modifying Opportunities

You can view or modify your sales opportunities by accessing the Opportunities link from the PeopleSoft CRM screen.

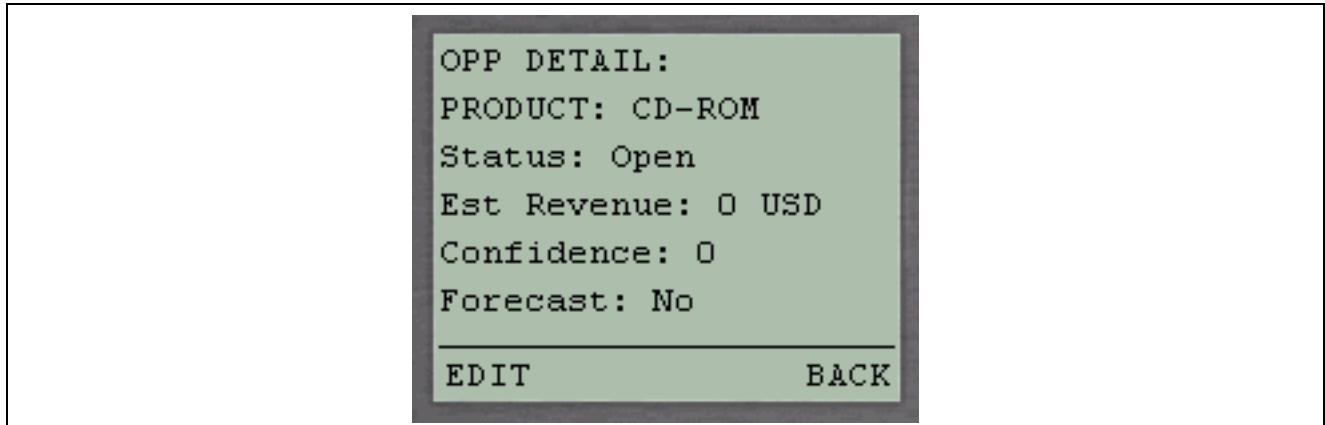
By default the list of opportunities that appear for each user will be: Opportunities as Manager, Opportunities as Owner, Opportunities as Task Assignee, New Opportunities as Owner, Team Member Opportunities, and Team Member Manager Opportunities. The opportunities are additionally filtered based on the status field. Only opportunities with status of Open will be displayed in the list. Opportunities with a status of Closed Lost, Closed Won or Inactive will be filtered out. If you would like to modify your own search filter for the Opportunity List transaction you can use the configurable search tool in the HTML version of the Opportunity List transaction. To do this, sign-in to the CRM application using your HTML browser and access the Sales->Opportunities->Opportunities List transaction. Once you are in there, configure the search the way that you would like it to behave in the WAP client then save the search using the name "WAP." The next time that you access the Opportunities option from the WAP Sales main menu, this new saved search filter will be used to retrieve your Opportunity List.

Note. Opportunities has an anchor to any associated Contacts and company. If there are any tasks associated with the opportunity, a task link appears. If the opportunity is converted from a lead, the opportunity has a link to the lead.

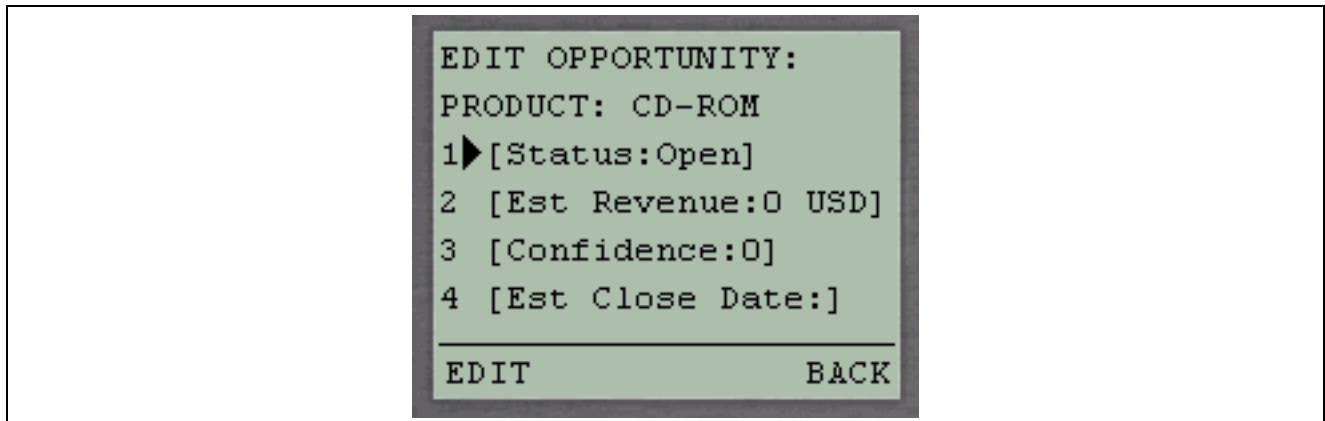
Users manage opportunity information using the Opportunity List screen, the Opportunity Detail screen, and the Edit Opportunity screen.



Opportunity List screen



Opportunity Detail screen



Edit Opportunity screen

To view or modify sales opportunities:

1. Select Opportunities from the PeopleSoft CRM screen.

The Opportunity List screen appears.

Note. If there is only one opportunity, you need not select from a list because the Opportunity Detail screen automatically appears.

2. Select an opportunity to view or modify details.

To modify an opportunity:

1. Access the Opportunity Detail screen as described in the previous steps.
2. Scroll down (or up) so that the black cursor arrow disappears entirely from the screen, and click the EDIT button.

The LINK button changes to an EDIT button; you are now in edit mode. The Edit Opportunity screen appears:

Status Shows whether the opportunity is *Open*, *Closed*, *Closed-Won*, or *Closed-Lost*.

If you change the status to Closed Won you will be prompted to enter the actual close date and the actual revenue. If you change the status to Closed

Lost, you will be prompted for the actual close date and you will be asked to select a fallout reason from a list.

Est Revenue (Estimated Revenue)

Estimated revenue for the opportunity.

Confidence

Confidence from 0% to 100%.

Est Close Date (Estimated Close Date)

Estimated closing date.

Forecast

Include in Forecast? Values are: *Yes* or *No*.

Forecast Type

Forecast type that indicates the degree of likelihood in closing the deal. Values include: *Committed* or *Stretch*.

Main Menu

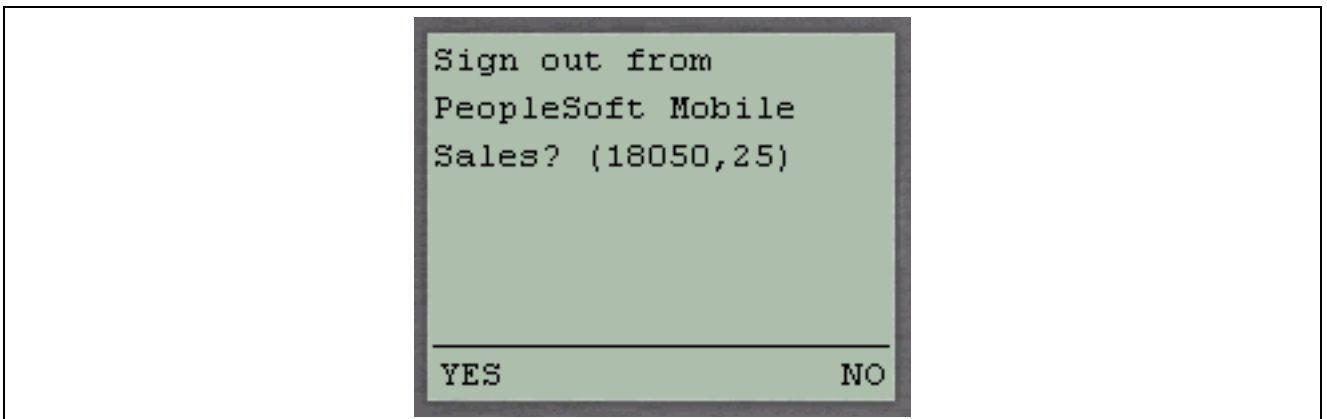
Return to PeopleSoft CRM screen.

See Also

PeopleSoft Sales 8.8 SPI PeopleBook, Working with Opportunities

Signing Out

Click the Sign Out link on the PeopleSoft CRM screen to access the Sign Out screen, where you are prompted to confirm whether you want to sign out. Click Yes to sign out; click No to remain connected.



Sign Out screen

Glossary of PeopleSoft 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.
account	You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.
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 entry	A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.
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 Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
activity	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.
administrator	In PeopleSoft Enterprise Learning Management, a person with particular administrative duties (or roles) within PeopleSoft Enterprise Learning Management. Administrative roles relate to such things as the learning catalog, learning finance,

	learning resources, rosters, profiles, enrollments, and learning environments. The term administrator is used generically except where it is necessary to be specific.
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 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.
application agent	An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attachment	In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment item's user handbook or the site map of a large facility.
background process	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft 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).
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.

category	In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
child	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
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> .
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.
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, PeopleSoft maintains a set of collections (one per language code) for each search index object.
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.
configuration parameter catalog	Used to configure an external system with PeopleSoft. 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.
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 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.

corporate account	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
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.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
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 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.
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
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.
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.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If you're working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values 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 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 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 job	Abbreviation for <i>Enterprise Incentive Management job</i> . In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organization's compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
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.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.
event	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, <i>event</i> also refers to incidents that affect benefits eligibility.
event propagation process	In PeopleSoft 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. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
fact	In PeopleSoft 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.
filter	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
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.
group	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
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, user interaction objects, and so on.
incentive rule	In PeopleSoft 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.

key	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.
keyword	In PeopleSoft Enterprise Learning Management, provides a way to search the catalog for relevant learning activities and programs. You can associate one or more keywords with each catalog item and program.
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.
level	A section of a tree that organizes groups of nodes.
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.
load	The feature that initiates a process to automatically load information into a PeopleSoft application—for example, populating the PeopleSoft Benefits database with plan-level election information.
local functionality	In PeopleSoft 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*—is the address you use most often and may be different from the main address.

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.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
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 SQLExec 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	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, one or more of an individual's learning goals. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage 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 and non-PeopleSoft content.
parent node	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
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> .
payout	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
per seat cost	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees.

	Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
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.
plan	In PeopleSoft 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 section	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
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.
portal registry	In PeopleSoft 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.
private view	A user-defined view that is available only to the user who created it.
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 an SQR, a COBOL 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 category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
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.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record definition	A logical grouping of data elements.
record field	A field within a record definition.
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 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 Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft 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> .
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
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.
results management process	In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.
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.
routing	Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takes—email message, electronic form, or worklist entry.
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.
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.
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.
self-service application	Self-service refers to PeopleSoft applications that are accessed by end users with a browser.
session	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.
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 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.
sibling	A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.

single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft 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.
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.
SQR	See <i>Structured Query Report (SQR)</i> .
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
Structured Query Report (SQR)	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
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 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.
table	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
TableSet sharing	Specifies control table data for each business unit so that redundancy is eliminated.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
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, you use templates to build a page by combining HTML from a number of sources. For a

	PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft 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 Projects.
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 loading process	In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.
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.
transaction type	In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company’s specific processes model.
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 systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
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.
uniform resource locator (URL)	In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: <code>http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k</code>
universal navigation header	Every PeopleSoft 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.
URL	See <i>uniform resource locator (URL)</i> .
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All 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 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.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
workflow	The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.
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.
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.

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