

# PeopleSoft CRM 9.1 Revision 1

## Summary of Changes

PeopleBook	Chapter > Section	Description of Change
PeopleSoft Enterprise CRM for Higher Education 9.1 PeopleBook	Recruiting Students > Using Search/Match with PERSON_BASIC_SYNC	Added documentation for the redesign of Person Basic Sync and related CDM EIPs
PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook	Defining Control Values for Business Objects > Modifying Contact Method Types	Added documentation for the redesign of Person Basic Sync and related CDM EIPs
PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook	Managing Enterprise Integration for PeopleSoft Enterprise CRM > Integration with PeopleSoft HRMS, PeopleSoft Campus Solutions or Third- Party HR Data	Added documentation for the redesign of Person Basic Sync and related CDM EIPs
PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook	Managing Enterprise Integration for PeopleSoft Enterprise CRM > PeopleSoft Enterprise CRM Foundation EIPs	Corrected information listed in the EIP table
PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook	Setting Up Multilevel Product Bundles > Setting Up Product Components	Updated the Component Type field description to explain how to populate drop-down field values properly
PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook	Working with Chat in PeopleSoft Enterprise CRM > Emailing Chat Logs	Added note to provide the maximum text line limit for chat logs
PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook	Working with Chat in PeopleSoft Enterprise CRM > Transferring Chat Sessions to Other Queues	Provided descriptions for newly added fields
PeopleSoft Enterprise CRM 9.1 Multichannel Applications Peoplebook	Understanding ERMS > The Mail Route Process	Updated the the mail route diagram based on the use of Verity to calculate email category for unstructured email
PeopleSoft Enterprise CRM 9.1 Multichannel Applications Peoplebook	Setting Up Automated Mail Processing > Use of AMP in Unstructured and Structured Email	Updated section based on the use of Verity to calculate email category for unstructured email
PeopleSoft Enterprise CRM 9.1 Multichannel Applications Peoplebook	Setting Up Automated Mail Processing > Verity Search and Email Category	Updated section based on the use of Verity to calculate email category for unstructured email
PeopleSoft Enterprise CRM 9.1 Multichannel Applications Peoplebook	Setting Up Automated Mail Processing > Defining AMP Categories and Keywords	Updated section based on the use of Verity to calculate email category for unstructured email
PeopleSoft Enterprise CRM 9.1 Multichannel Applications Peoplebook	Setting Up United Agent Desktop > Understanding Unified Agent Desktop	Added note to state that UAD is certified with the PSSTYLEDEF_SWAN style sheet only

<b>PeopleBook</b>	<b>Chapter &gt; Section</b>	<b>Description of Change</b>
PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook	Using the 360-Degree View > Searching for Business Objects in the 360-Degree View	Added note to explain the display behavior of the Customer 360-Degree View
PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook	Working with Active Analytics Framework > Configuring Workflow Actions	Updated the Send Notification To field description to note the length requirement on email addresses for receiving notifications
PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook	Setting Up and Using Worklists	Updated screenshot to show the Feed functionality on My Worklist
PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook	Managing Solutions > Defining Solutions	Added note to explain the display behavior of solution search
PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook	Defining Control Values for Business Objects > Defining Component Transfer Navigation	Added a note to recommend not changing the delivered component navigation definitions. Added a note to explain accessibility to contact details based on user permission.
PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook	Defining Worker > Inactivating Provider Group Memberships for Worker Terminated in HRMS	Added this section on inactivating provider group memberships for workers that are terminated in HRMS system
PeopleSoft Enterprise CRM Product and Item Management PeopleBook	Setting Up Products > Defining Product Packages	Added field description for the Display Order field on the Package Components page
PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook	Managing Orders and Quotes > Understanding Order Maintenance	Added a warning note for the Completed status in orders.
PeopleSoft Enterprise CRM 9.1 Multichannel Applications Peoplebook	Setting Up Chat > Chat and Interactions	Provided documentation to cover the categorization of chats and emails. Added note for browser versions supported by UAD
PeopleSoft Enterprise CRM 9.1 Multichannel Applications Peoplebook	Managing Email > Reviewing Email Event History	Provided documentation to cover the categorization of chats and emails. Added note for browser versions supported by UAD
PeopleSoft Enterprise CRM 9.1 Multichannel Applications Peoplebook	Working with Chat in PeopleSoft Enterprise CRM > Chat Session Categorization	Provided documentation to cover the categorization of chats and emails. Added note for browser versions supported by UAD
PeopleSoft Enterprise CRM 9.1 Multichannel Applications Peoplebook	Working With Unified Agent Desktop > Processing Phone Calls	Provided documentation to cover the categorization of chats and emails. Added note for browser versions supported by UAD

<b>PeopleBook</b>	<b>Chapter &gt; Section</b>	<b>Description of Change</b>
PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook	Working with Interactions > Viewing Interaction Details	Provided documentation to cover the categorization of chats and emails. Added note for browser versions supported by UAD
PeopleSoft Enterprise CRM 9.1 Multichannel Applications Peoplebook	Working with Chat in PeopleSoft Enterprise CRM > Chat Session Categorization	Corrected content in the section
PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook	Working with Tasks > Resetting Sync IDs	Added this section to provide field description for the Set SYNCIDs page
PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook	Working with Tasks > Creating Tasks or Updating Task Details	Added description for Task reminder
PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook	Working with Supervisor Desktop > Monitoring Real-Time Information	Added note to clarified that abandoned task counts are displayed only for the voice channel
PeopleSoft Enterprise Advanced Configurator 9.1 PeopleBook	Using JSP Form Control Templates > Understanding JSP Code Templates	Added notes for the text input form controls and extern entry form controls.
PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook	Processing Cases > Understanding Related Actions	Combined three existing tables on related actions into one and verified information in the consolidated table
PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook	Working with Notes and Attachments > Viewing Lists of Notes	Retook screenshot to reflect the updated name of the Company Notes page
PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook	Working with Active Analytics Framework > Understanding CRM Action Types	Added a note under the case history tracking action section to clarify that this action does not support the ComponentPostBuild trigger type
PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook	Setting Up and Managing Agreements and Warranties > Defining Agreement Header Information	Added a sentence to clarify that the defaulting of PGs and agents for service orders only.
PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook	Setting Up and Managing Agreements and Warranties > Configuring Agreement Searches	Added a note to clarify the behaviors the available autoselect options
Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook	Working with the Text Tray > Text Tray Entries Working with the Text Tray > Using the Text Tray	Added a note and modified couple paragraphs to clarify how text tray should be used in fields where rich text editor is supported.
PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook	PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook > Setting Up Links and Related Actions > Setting Up Content References	Removed an incorrect note about requiring PeopleSoft Enterprise Portal license for using non-PeopleSoft action links.

<b>PeopleBook</b>	<b>Chapter &gt; Section</b>	<b>Description of Change</b>
PeopleSoft Enterprise CRM 9.1 Event Management PeopleBook	PeopleSoft Enterprise CRM 9.1 Event Management Peoplebook > Executing and Converting Events > Setting Up Email Communications	Added a note stating that it's possible to temporarily add a duplicate trigger, and that if you add a duplicate trigger before saving, emails can be sent from each duplicate.
PeopleSoft Enterprise CRM 9.1 for Higher Education PeopleBook	PeopleSoft Enterprise CRM 9.1 for Higher Education PeopleBook > Syncing Control Tables	Added a note stating that when you add a new institution using specific EIPs, you must restart the app server and clear the cache as well as clearing the profile cache.
PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook	Working with Orders for Multilevel Product Bundles (beginning of the chapter) Understanding Multilevel Product Bundles > Multilevel Product Bundles	Modified existing notes to state that multilevel product bundles are not supported in bulk orders and bulk service management orders.
PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook	PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook > Managing Orders and Quotes > Viewing or Modifying Line Details	Added descriptions for two links on the Line Details page.
PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook	PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook > Appendix: PeopleSoft Business Object Management Report	Added a report appendix for the book to provide description for the Contact Report.
PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook	PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook > Managing Cases > Entering Case Information	Modified existing paragraph to clarify that for HRHD cases, only the Employee and Business Unit fields are changed to read-only fields when an agreement or warranty is selected and the case is saved. Product and Product Group fields are still editable.
PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook	PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook > Managing Email > Understanding Email Management	Modified existing paragraph to clarify that related transactions can only be created from email when the email is not in the Closed status.
PeopleSoft Enterprise CRM for Higher Education 9.1 PeopleBook	PeopleSoft Enterprise CRM for Higher Education 9.1 PeopleBook > Populating the CS-Person Profile	Added an appendix to the book to describe the population of CS-Person profile and the EIP configurations that are required for the profile population to occur.