PeopleSoft®

PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook

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PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 PeopleBook
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Contents

About This PeopleBook Preface

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

This preface discusses:

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

Note. PeopleBooks document only page elements, such as fields and check boxes, 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.

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

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

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

PeopleSoft Application Fundamentals

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

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

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- 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, https://www.peoplesoft.com/corp/en/login.jsp

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 PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplesoftpress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

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

Resource	Navigation
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	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 letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
" " (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

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)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

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.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other 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 Used in PeopleBooks

Address Book Number Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant id, participant number, and so on.

As If Currency Code	Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code allows you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.
Batch Number	Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).
Batch Date	Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.
Batch Status	Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are: *Blank:* Batch is unposted and pending approval. *A:* The batch is approved for posting, has no errors and is in balance, but it has not yet been posted. *D:* The batch posted successfully. *E:* The batch is in error. You must correct the batch before it can post. *P:* The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to E. *U:* The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.
Branch/Plant	Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.
Business Unit	Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.
Category Code	Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.
Company	Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.
Currency Code	Enter the three-character code that represents the currency of the transaction. PeopleSoft EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.
Document Company	Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document. If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

Document Number — Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

Document Type — Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. PeopleSoft EnterpriseOne reserves these prefixes for the document types indicated:

P: Accounts payable documents.

R: Accounts receivable documents.

T: Time and pay documents.

I: Inventory documents.

O: Purchase order documents.

S: Sales order documents.

Effective Date — Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

Fiscal Period and **Fiscal Year** — Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).

G/L Date (general ledger date) — Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

PeopleSoft EnterpriseOne CRM Application Fundamentals Preface

This preface discusses:

- PeopleSoft products.
- Common elements used in this PeopleBook.

PeopleSoft Products

This PeopleBook refers to these PeopleSoft products:

- PeopleSoft EnterpriseOne Address Book
- PeopleSoft EnterpriseOne CRM products

Common Elements Used in This PeopleBook

Address Type

Enter the code that tells the system to use this address as a Sold To address, a Ship To address, or both. Codes are:

X: Use as a bill to and ship to address

S: Use as a ship to address only

B: Use as a bill to address only

City

Enter the name of the city associated with the address.

Country

Enter the user-defined code (00/CN) that identifies a country. The country code has no effect on currency conversion. The Address Book system uses the country code for data selection and address formatting.

County

Enter the name of a the contact's county, parish, or other political district if necessary for address or tax purposes.

Currency Code

View the code that identifies the currency for the transaction, opportunity, or sales order.

Description

Enter a brief description of the opportunity, item, catalog, opportunity, order type, service order, customer issue, data set, or template contents.

Electronic Address

Enter the customer's email address or Uniform Resource Locator (URL). Note: For Electronic Address Type W - Internal email (Work Center), the Electronic Address field must be blank.

Electronic Address Type

Enter the user-defined code (system 01, type ET) that describes the type of electronic address. Values are:

	E: Email address such as name@domain
	I: Internet address URL (Uniform Resource Locator)
	W: Internal address (Work Center)
Postal Code	Enter the United States ZIP code or the postal code that specifies where a letter should be routed.
Phone Number	Enter the contact's telephone number digits, excluding the phone prefix or special characters such as hyphens or periods. When you search for an address using a phone number, you must enter the number exactly as it is set up in the Address Book system, including any special characters.
Phone Prefix	Enter the first telephone number's first segment, such as the three-digit area code used in United States.
State	Enter the user-defined code (system 00, type S) that identifies the state or province. This code is usually a postal service abbreviation.
Title	Enter the professional title of the contact as entered in the Who's Who table.

CHAPTER 1

Getting Started with PeopleSoft EnterpriseOne CRM Application Fundamentals

This chapter discusses:

- CRM application fundamentals overview.
- CRM Foundation business processes.
- CRM Foundation integrations.
- CRM Foundation implementation.

CRM Application Fundamentals Overview

This guide discusses the CRM Foundation system, and how the applications in this system provide the basis for all CRM-related business processes that your organization uses. To use any of the EnterpriseOne CRM products, including Sales Force Automation, Case Management, and Service Management, you must also use the CRM Foundation system.

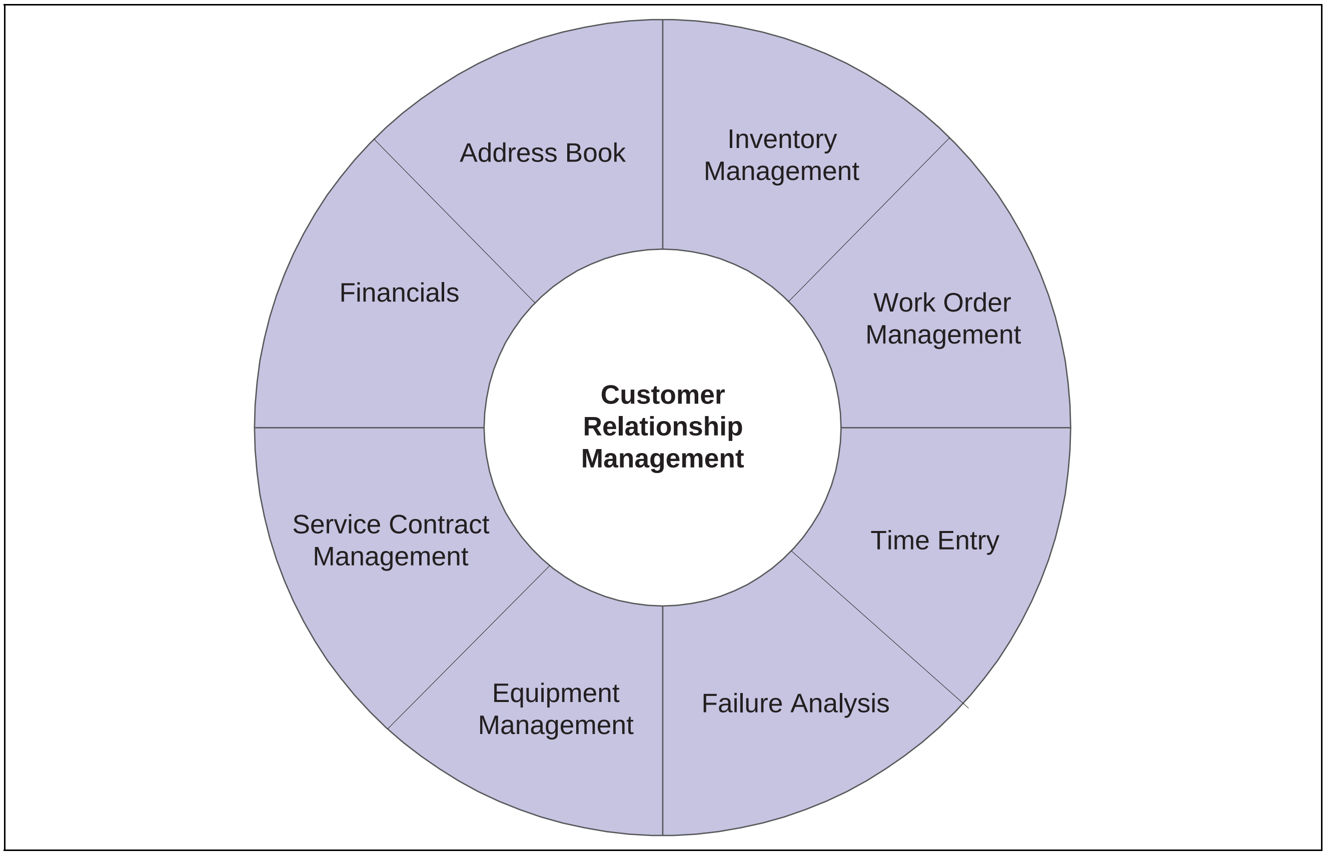
You can use the CRM Foundation system to perform the following tasks:

- Set up CRM constants, which are used to determine how the system processes CRM-related information.
- Enter CRM information for employees, customers, contacts, and partners.

  You can enter employees, customers, contacts, and partners using CRM applications, or you can manage and maintain CRM information for existing employees, customers, and partners that have already been entered into the EnterpriseOne system using other applications.
- Enter and maintain product item and item catalogs, which can be used in sales, service, and support business processes.
- Generate customized proposal documents for customers and prospects.
- Set up email lists, and use email merge functionality to assist in communication similar information to large groups of people.
- Create call plans to assist service and support employees.

CRM Foundation Business Processes

The following process flows illustrate the CRM Application Fundamentals business processes:



CRM Business Process

CRM Foundation Integrations

The CRM Foundation system integrates with the following EnterpriseOne systems:

- Address Book
- CRM Support Systems
- Sales Force Automation

Address Book

The CRM Foundation system integrates closely with the EnterpriseOne Address Book system. All employee, customer, contact, and partner records are stored in the Address Book system, whether they are entered using CRM applications, or applications from other systems. Once the records reside in the Address Book system, you can access them from the CRM system, and maintain and update CRM-related information.

CRM Support Systems

The CRM Foundation system provides the basis for the following CRM support systems:

- Branch Scripting
- Case Management
- Solution Advisor

Before you can use any of these systems effectively, you must set up the CRM Foundation system, which includes setting up CRM constants and creating employee, customer, and item records.

Sales Force Automation

The CRM Foundation system is also the basis for the Sales Force Automation system. Before you can align your sales force, or analyze customer and prospect needs, you must first set up the CRM Foundation system, which includes setting up CRM constants and creating employee, customer, contact, partner, and item records.

CRM Foundation Implementation

This section provides an overview of the steps that are required to implement the CRM Foundation system.

In the planning phase of the implementation, take advantage of all PeopleSoft sources of information, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface in *About These PeopleBooks* with information about where to find the most current version of each.

Global Implementation Steps

This table lists the suggested global implementation steps for PeopleSoft EnterpriseOne CRM systems:

Step	Reference
1. Set up global UDC tables.	*PeopleSoft EnterpriseOne Tools 8.94 Foundation PeopleBook*
2. Set up companies, fiscal date patterns, and business units.	*PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook*, “Setting Up an Organization”
3. (Optional) Set up accounts, and the chart of accounts.	*PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook*, “Setting Up Accounts”
4. (Optional) Set up the General Accounting constants.	*PeopleSoft EnterpriseOne General Accounting 8.11 PeopleBook*, “Setting Up the General Accounting System”
5. (Optional) Set up multicurrency processing, including currency codes and exchange rates.	• *PeopleSoft EnterpriseOne Multicurrency Processing 8.11 PeopleBook*, “Setting Up General Accounting for Multicurrency Processing” • *PeopleSoft EnterpriseOne Multicurrency Processing 8.11 PeopleBook*, “Setting Up Exchange Rates”
6. (Optional) Set up ledger type rules.	*PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook*, “Setting Up Ledger Type Rules for General Accounting”
7. Set up branch/plant constants.	*PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook*, “Setting Up the Inventory Management System”

CRM Foundation Implementation Steps

This table lists the implementation steps for CRM Foundation:

Step	Reference
1. Set up CRM Constants.	Chapter 3, "Setting Up CRM Constants and Employees," page 11

CHAPTER 2

Understanding CRM Fundamentals

This chapter discusses:

- The PeopleSoft EnterpriseOne CRM system.
- PeopleSoft EnterpriseOne CRM Fundamentals applications.
- CRM constants and employees.
- Catalogs.
- Customers.
- Partners.
- Contacts.
- Call plan.
- Email and mail merge.
- Proposal generation.

Understanding the PeopleSoft EnterpriseOne CRM System

PeopleSoft EnterpriseOne CRM is a set of customer life cycle management applications that enable you to create a complete view of each customer. The PeopleSoft EnterpriseOne CRM applications help you build strong relationships, the key to customer loyalty. Here are just two of the ways in which the PeopleSoft EnterpriseOne CRM applications link to various customer touch points:

- Sales Force Automation applications let you manage accounts, leads, contacts, and opportunities; plan and execute sales strategies; and forecast more effectively.
- The Partner application helps you collaborate with partners using the Web, pass leads to resellers, and provide partners with a unique and secure view of leads.

Understanding PeopleSoft EnterpriseOne CRM Fundamentals Applications

The PeopleSoft EnterpriseOne CRM applications help companies manage the entire customer life cycle, from customer acquisition to post-sales service and support. PeopleSoft EnterpriseOne CRM applications reside on the PeopleSoft EnterpriseOne menu under various menu headings, including Sales Force Automation, Service Management, and Support. The PeopleSoft EnterpriseOne CRM fundamental applications and features are

- Item inquiry
- Item catalog
- Contact
- Customer
- Employee
- Email
- Call plan
- Partners
- Opportunity
- Proposal generation

The PeopleSoft EnterpriseOne CRM fundamental applications are integrated with other PeopleSoft EnterpriseOne applications, which reduces or eliminates redundant data entry. For example, information entered in the Address Book application appears in the Employee application as well.

Understanding CRM Constants and Employees

Before you can process information using CRM applications, you must set up the CRM constants. Constants are used to specify how you want the system to process CRM-related information. The CRM_Constants program (P90CA000) provides the basis for all CRM applications.

You also set up the employees that you want to process information for. When you set up employees, you can enter sales, service, and support information that is used by the CRM applications.

Understanding Catalogs

The Catalog application enables you to view catalog information, or to add catalog items to a sales order, quote, opportunity, or lead.

The Catalog application provides these features for all CRM, sales, support, and service users:

- Locate catalog items quickly.
- View catalog item information such as the item description, stocking type, unit of measure, product model, or product family.
- View a catalog item's list of features, availability, and base price.
- View the opportunities and partners associated with a catalog item.
- View catalogs in single select or multiple select mode.
- Associate an entire catalog to a lead, opportunity, quote, or sales order.

Understanding Customers

The Customer application includes tabs that enable you to view or modify information related to the selected customer. Accessing some of these tabs takes you to a different application. For example, if you select the Sales tab, you can add a new sales order for the customer through the Sales Order application.

When you launch the Customer application the Search for Customer form appears. On this form you can find and select the customer whose information you want to view or modify. If a selected customer record has subordinate records, you can view the parent and child records by clicking the Parent Child Hierarchy link, which displays the information on a form called Customer Parent Child Relationship.

Some forms have links at the top of the form that enable you to view or modify information related to the main tab. The Customer tab has additional tabs on the lower portion of the form that enable you to view or modify related customer detail information.

In situations where you are using an application other than the Customer application to perform a task (such as to add a new activity), you should refer to the documentation for that specific application for details. References are provided in situations where you should see another chapter or PeopleBook for more information.

Understanding Partners

The Partners feature helps you manage partner information by providing you with this functionality:

- View partners who are previously associated with customers, employees, items, sales leads, cases, opportunities, or activities.
- View and assign partner contacts to cases, opportunities, or activities.
- Create and maintain partner detail information, including single or multiple addresses, single or multiple contacts, notes, and attachments through PeopleSoft EnterpriseOne Address Book.
- Modify or delete partner information as needed through Address Book.

The Partner feature enables you to view partners who are currently assigned to a customer, employee, item, sales lead, case, opportunity, or activity. You can also assign a partner to a customer, employee, item, sales lead, case, opportunity, or activity, or remove an assignment.

Understanding Contacts

The Contact application provides a way to view and modify existing contact information, and to create new contacts. Contacts are used in EnterpriseOne Sales Force Automation and Service applications. To facilitate integration, from the Contact application you can access contact information that pertains to Sales Force Automation or Service.

The Contact application is also an entry point for the Email Merge and Mail Merge features. Before you can use either of these features, you must create at least one contact.

The Contact form has these tabs that enable you to view or modify contact information:

- Contact: View or modify the contact’s detail information, address and phone, and related people.

- Activities: View or modify activity and email information for the contact.
- Sales: View or modify opportunity, pipeline, quote, or sales order information for the contact.
- Service: View or modify information about cases associated with the contact.
- Attachments: View, modify, or enter attachments for the contact.

Some of the tabs have links that let you view or modify related information. For example, the Sales tab has links that let you view or modify pipeline, quote, and sales order information.

Many forms have grids that let you locate and select specific records which you can view or modify using different applications. For example, on the Sales tab you can locate an opportunity and view or modify its information through the Opportunity application. When you are finished viewing or modifying information within that application, you return to the Contact application.

Understanding Call Plans

The Call Plan feature enables sales representatives making customer calls to view a template containing question prompts, goals, and reminders. This feature is available from the Activity (P01301) and Action Plan (P01401) applications.

You can associate the call plan template from both the Activity and Action Plan applications.

When viewing the call plan form from either the Activity or Action Plan application, you can make changes to any of the templates fields. For example, when you are speaking with a customer you might think of additional questions you would like to ask other customers. However, when your changes are saved, a copy of the call plan template is associated to the Activity or Action Plan, and the original call plan template is not affected.

There is also a Call Plan application that enables you to view and create your own call plan templates.

Understanding Email and Mail Merge

The email feature is integrated into the EnterpriseOne system and enables you to send email messages to groups or individuals without using a separate program such as Microsoft Outlook or Lotus Notes. You can send saved messages and create new messages, and you can vary the recipients.

Rather than specifying long lists of email recipients, you can easily create groups comprised of individuals or subgroups. For example, you might create a groups for customers, local or regional associates, or employees in your department.

As your business needs change, you can modify email groups.

If you routinely perform mass emailing or regular mailings, the email merge and mail merge features might be beneficial.

The mail merge feature is driven by a wizard that walks you through the process of selecting a template and customizing it for the mailing. This process is similar to the one used by the Proposal Generation feature.

Email merge works like a traditional mail merge, enabling you to create personalized communications that automatically retrieve from the EnterpriseOne system information such as the recipient's name, address, and so on.

Understanding Proposal Generation

You can use the proposal generation feature to produce not only sales proposals, but other types of documents as well. This feature enables you to mix and match document components, enabling you to specify everything you want included on the generated document. For example, you could create a product mailing for your customers that contains your company logo, a description of a new product, and pricing information.

The proposal generation feature uses templates that let you easily attach document parts (such as a quote detail and quote summary) to a proposal document. For example, the proposal you want to generate from the template might include the address to which the last order was shipped, estimated or actual order start dates, and special delivery instructions.

To supplement the templates that the PeopleSoft system provides, you can create your own templates for general or specific use. You create templates by first creating the document parts or components used in the template. Document parts can consist of text and images. As your needs change, you can modify or delete templates.

After you create a proposal, it is attached to a sales order. And, because proposals are saved as media objects, you can make proposals available online or email the generated proposal.

CHAPTER 3

Setting Up CRM Constants and Employees

This chapter provides an overview of CRM constants and employees, and discusses how to:

- Set up CRM constants.
- Manage CRM Employees.

Understanding CRM Constants and Employees

Before you can process information using CRM applications, you must set up the CRM constants. Constants are used to specify how you want the system to process CRM-related information. The CRM_Constants program (P90CA000) provides the basis for all CRM applications.

You also set up the employees that you want to process information for. When you set up employees, you can enter sales, service, and support information that is used by the CRM applications.

Setting Up CRM Constants

This section provides an overview of CRM constants and discusses how to set up the CRM constants.

Understanding CRM Constants

Before you can process any sales-related information, you must set up the CRM_Constants program to define the sales features that your organization uses, and how the system processes the sales information. You set up CRM constants once, and these settings are used to process sales information for each company within your organization.

The CRM Constants program controls the following:

- How the system saves information.

  You can set up the system to automatically save information, or to prompt you to save information, when you move from one form to another. When you set up the system to prompt you, you have the option of saving the data or canceling the save. If you set up the system to save automatically, all data changes that you make are saved when you exit a form.

- How the system determines which sales team members to assign to a sales opportunity.

  You can set up the system to assign sales team members to a sales opportunity based on the sold to customer, the ship to customer, or both.

For example, a sales opportunity might have different sold to and ship to customers. Each of those customers has its own sales team. This constant determines whether the active members of the sold to, ship to, or both sales teams are copied to the sales opportunity sales team.

- Which phone number to display for sales team members.

  When you enter sales team members into the system, you can enter multiple phone numbers for each member. To ensure consistency when viewing the sales team members that are associated with customers, opportunities, quotes, and sales orders, you can specify which type of phone number is displayed for the sales team members.

  For example, if your sales members are typically on the road, and can most easily be reached on a mobile phone, you can set up the system to display the mobile phone number of each sales team member.

- How commissions are processed when a sales order is created.

  You can determine whether records are written to the sales commission tables based on the sales order sold to address, ship to address, or both. This setting is used only to determine which sales team members receive commissions. You must set up commission information for sales team members and customers in the Sales Order Management system in order to calculate the actual commission amounts.

  If you base commissions on the Sold To address, when a sales order is created, only the sales team members that are associated with the Sold To customer record are written to commission tables.

  For example, Joe Smith is the sales representative for Customer A-1, which is designated as the Sold To customer on a sales order. Nancy Jones is the sales representative for Customer A-2, which is designated as the Ship To customer on the sales order. Because the CRM constants have been set up to base commissions on the Sold To record only, Joe Smith is the only sales team member whose commissions are written to the commissions tables.

- Whether the system updates the Sales Order Extension tables.

  You use the Sales Order Extension option to determine whether the system updates the F4201UR table and the F4211UR table at the time of sales order entry or when an opportunity is being converted to a sales order/quote.

- Which currency code and monetary amounts are associated with each gold bar level.

  You can use gold bar functionality to visually display the potential monetary amount that is associated with a lead or opportunity. You define the monetary parameters that determine the number of gold bars that appear. There are four gold bars available for use. You set up your system so that the customers with the largest monetary potential display 4 bars, and those with the least amount of monetary potential display one, or no bars.

- Which type of calendar is displayed when using the calendar feature.

  The calendar feature enables you to create several different types of calendars. Using the CRM Constants, you can specify the default calendar type to display when accessing the calendar feature from CRM Sales Force Automation applications.

  Calendar type codes are stored in UDC 01/CY, and might include types such as personal calendars, carrier calendars, or resource calendars.

See Also

PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook, “Setting Up the System for Sales Order Management,” Setting Up Commission Information

PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook, “Setting Up the System for Sales Order Management,” Setting Up Commission Constants

PeopleSoft EnterpriseOne Address Book 8.11 PeopleBook, “Setting Up Foundation Calendar”

Form Used to Set Up CRM Constants

Form Name	Form ID	Navigation	Usage
CRM Constants	W90CA000C	Sales Setup (G90CA03), CRM Constants	Set up CRM.

Setting Up CRM Constants

Access the CRM Constants form.

CRM Constants, Process

Select the Process tab.

Implicit Save

Use this option to specify whether the system prompts the user to save, or automatically saves data changes when exiting a form.

CRM Constants, Sales Team

Select the Sales Team tab.

Sold To Ship To Default

Specify whether the system assigns the sales team members to an opportunity based on the ship to customer, sold to customer, or both. For example, if you choose Sold To, the system assigns the active sales team members from the opportunity's Sold To customer record to the sales opportunity. Values are:

Blank: Sold To

1: Ship To

2: Both

Phone Number Type

Enter the type of phone number that the system displays on all sales team forms in the CRM Sales Force Automation system. Values are stored in UDC 01/PH and might include:

Blank

Business telephone number

FAX

Fax telephone number

HOM

Home telephone number

CRM Constants, Sales Order

Select the Sales Order tab.

Sold To Ship To Default

Enter the method that the system uses to determine which members of a sales team are eligible to receive commissions for a sales order that is generated using the CRM Sales Force Automation system. This setting determines which sales team member records are written to the sales commissions tables when a sales order is created. Sales team members must be active on the sales team in order to be eligible for commissions. Values are:

	0: Only sales members associated with the Sold To customer are eligible for commissions. *1:* Only sales members associated with the Ship To customer are eligible for commissions. *2:* Sales team members associated with both the Sold To and Ship To customers are eligible for commissions.
Update Sales Order Extension	Specify whether the system updates the F4201UR table and the F4211UR table during sales order entry or when an opportunity is converted to a sales order or quote. These tables are used to store customized information about sales orders. It is necessary to update these tables only if you have set them up.

CRM Constants, Gold Bars

Select the Gold Bars tab.

Currency Code	Enter the value of the currency code you want to use to define the potential monetary amounts associated with opportunities.
No Bars	Enter the value at or below which no gold bars appear. For example, if you do not want gold bars to appear for any opportunities with a monetary value of 1,000 USD or less, enter *1000.* This amount is associated with the currency code that you enter in the Currency Code field.
One Bar	Enter the values, between which, one gold bar appears. For example, if you want one gold bar to appear for opportunities with a monetary value between 1,000.01 USD and 15,000 USD, enter *1000.01* in the left field, and enter *15000* in the right field on the One Bar row. This amount is associated with the currency code that you enter in the Currency Code field.
Two Bars	Enter the values, between which, two gold bars appear. For example, if you want two gold bars to appear for opportunities with a monetary value between 15,000.01 USD and 100,000 USD, enter *15000.01* in the left field, and enter *100000* in the right field on the Two Bar row. This amount is associated with the currency code that you enter in the Currency Code field.
Three Bars	Enter the values, between which, three gold bars appear. For example, if you want three gold bars to appear for opportunities with a monetary value between 100,000.01 USD and 500,000 USD, enter *100000.01* in the left field, and enter *500000* in the right field on the Three Bar row. This amount is associated with the currency code that you enter in the Currency Code field.
Four Bars	Enter the value, above which, four gold bars appear. For example, to display four gold bars for opportunities of 500,000.01 USD or more, enter *500000.01* in the field in the Four Bar row.

CRM Constants, Calendar

Select the Calendar tab.

Calendar Drop Down Menu	Select the calendar option from the menu to determine the default calendar type that is displayed when the calendar feature is accessed from a CRM Sales Force Automation application.

Managing CRM Employees

This section includes an overview of employee information for CRM, and discusses how to

- Enter basic employee information.
- Enter additional phone and email information for employees.
- Set up service provider information.
- Assign partners to employees.
- Enter attachments for employees.
- Review parent child relationships.
- Set processing options for the Employee Detail program (P90CA040).
- Set processing options for the Employee Processing Options program (P90CA043).

Understanding Employee Information for CRM

Before you can add an employee to the sales force or to a provider group, you must enter your employees into the system. Each sales or support employee must have a record in the F0101 table and the F0111 table.

The method that you use to enter the employees depends upon the EnterpriseOne systems that your organization uses. If your organization uses EnterpriseOne Human Capital Management, address book records are created during the employee entry process. If you do not use EnterpriseOne Human Capital Management system, you can enter employees into the system using EnterpriseOne Address Book.

Alternatively, you can enter employees using the Employee Detail program (P90CA040). This program enables you to enter and maintain all CRM-related employee information from one entry point. When you add employees using this program, the system creates the necessary address book records.

After you enter employees into the system, they can participate on sales teams associated with customers, opportunities, quotes, and sales orders. They can be added to provider groups, which are responsible for managing service requests or cases. Provider groups are also used to determine case escalation paths.

The employees in your organization might work frequently with members of other organizations with which you have partnerships. Some of the employees might be responsible for maintaining those partner relationships. Using the Employee Detail program, you can associate employees with multiple partners so that you can review partner relationships by employee.

Employees can be commissioned or non-commissioned. You can access employee commission information from the Employee Detail program entry point.

After you set up basic information about the employee, you can then enter additional employee information, such as:

- Additional phone and email information.
- Service provider information.
- Partner relationships.
- Attachments.

Before you enter employees into the system, you must set the processing options for the Employee Detail program (P90CA040) and the Employee Processing Options program (P90CA043). The Employee Processing Options program can be accessed using the Interactive Versions program (fast path IV). This program is not located on a menu.

Reviewing CRM Information for Employees

In addition to entering employee information, you can use the Employee Detail program to review CRM-related employee information. The following table lists the type of information that you can review, along with the description and location of the information:

Type of Information	Description and Location
Provider Group	You can review all of the provider groups that an employee is associated with. Provider group information is located on the Service tab of the Employee - Manage <Employee Name> form.
Cases	You can review all of the cases that an employee is associated with. You can use the following information to search for cases associated with an employee: • Customer number • Site number • Contact number • Equipment number • Case status Case information is located on the Service tab of the Employee - Manage <Employee Name> form.
Opportunities	You can review all of the active opportunities for which the employee is a member of the sales team. The opportunity information that you can review includes: • Customer • Sales cycle • Probability of closing • Potential amount Opportunity information is located on the Sales tab of the Employee - Manage <Employee Name> form.
Pipeline	You can review the potential revenue associated with an employee by viewing the employee's pipeline. Pipeline information is located on the Sales tab of the Employee - Manage <Employee Name> form.

Type of Information	Description and Location
Customers	You can review all of the customers for which the employee is currently a member of the sales team. Customer information is located on the Customer and Partner tab of the Employee - Manage <Employee Name> form.
Parent Child Hierarchy	You can review the parent child relationships for employees within your organization. The system displays, in hierarchical detail, the organizational structure of the selected employees.

When you review CRM-related information for employees, some forms enable you to view information for the selected employee as well as the employee's subordinates by clicking the Expand Hierarchy or Collapse Hierarchy buttons.

For example, Jane Ryan has 12 employees who report to her. When you review customer information for Jane, you initially see only those customers whose sales teams include Jane. If you click the Expand Hierarchy button, the system displays all customers whose sales teams include Jane or one of her subordinates. If you click the Collapse Hierarchy button, the system removes information about the subordinates, and displays only Jane's information.

Related Links

The Employee Detail program provides you with links to programs in other EnterpriseOne product areas that contain employee information. You can use these links to access, review, and edit the following types of information:

- Accounts payable information
- Accounts receivable information
- Regional information
- Bank account information
- Address book information
- Contact information
- Commission information

Note. Documentation about entering and maintaining the preceding information resides in the product-specific PeopleBooks that are associated with each product area.

See Also

Chapter 8, “Managing Contacts,” page 125

PeopleSoft EnterpriseOne Customer Relationship Management 8.11 Sales Applications PeopleBook, “Managing the Sales Force”

PeopleSoft EnterpriseOne Customer Relationship Management 8.11 Support Applications PeopleBook, “Setting Up Provider Groups”

PeopleSoft EnterpriseOne Human Capital Management Application Fundamentals 8.11 PeopleBook, “Setting Up Employee Information”

PeopleSoft EnterpriseOne Address Book 8.11 PeopleBook, “Entering Address Book Records”

PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook, “Setting Up the System for Sales Order Management,” Setting Up Commission Information

PeopleSoft EnterpriseOne Sales Order Management 8.11 PeopleBook, “Setting Up the System for Sales Order Management,” Setting Up Commission Constants

PeopleSoft EnterpriseOne Accounts Payable 8.11 PeopleBook

PeopleSoft EnterpriseOne Accounts Receivable 8.11 PeopleBook

Forms Used to Enter Employees for CRM

Form Name	Form ID	Navigation	Usage
Search For Employees	W90CA040F	Sales Periodic Processing (G90CA03), Employee Management	Select existing employees for revision, or access the Add New Employee form.
Employee Parent Child Relationships	W90CA040D	Click the Parent Child Hierarchy link on the Search for Employees form.	Review parent child relationships.
Add Employee	W90CA048A	Click Add on the Search for Employees form.	Enter basic employee information.
Employee - Manage <Employee Name>	W90CA040A	Select an employee from the Search for Employees form.	Review and maintain employee information.
Employee Phone and E-Mail for <Employee Name> form	W90CA045A	Click the Phone and E-Mail link on the Employee - Manage <Employee Name> form.	Enter additional phone and email information for an employee.
Employee Attachments for <Name>	W90CA047A	Select the Attachments tab on the Employee - Manage <Employee Name> form.	Enter attachments for an employee.

Entering Basic Employee Information

Access the Add Employee form.

Search Type Verify that the system populates this field with an *E.* Values for this field are stored in UDC (01/ST), and are used to specify the kind of address book record the system creates.

Business Unit Enter the business unit that the employee belongs to.

Department Enter the name of the department that the employee works in.

Industry Classification Enter the industry code associated with the employee.

A code that classifies goods and services. This code can be in the format of the following systems of classification: Standard Industrial Classification or North American Industry Classification System. A numerical system used in the United States to classify goods and services. This code is four or six digits. Harmonized System. The international method of classifying goods. More than fifty countries use this code. It can be up to 10 digits. Standard Industrial Trade Classification. A numerical code system developed by the United Nations to classify goods used in international trade. International organizations use this code. It can be up to six digits.

Note. This code is not used in the sales force alignment process. You must add the employee to an industry grouping to automatically assign the employee to a sales team.

Employee Y/N Select this option to specify that the record you are creating is for an employee. This field is informational only.

HCM Records Exist Review this field to determine whether Human Capital Management (HCM) records exist for this employee. The system populates this field for employees who were entered using the HCM system.

Ignore Service Escalation Select this option if you do not want the employee to be included in the escalation process for service requests. You can use this option to temporarily remove an employee from the escalation process while they are on vacation or away from the office for a significant period of time.

E-mail Preference Leave this field blank. This field is for future use.

Shortcut to Client Type Leave this field blank. This field is for future use.

Preferred Contact Method Enter the desired contact method for the employee. Examples include:

E: Email

F: Fax

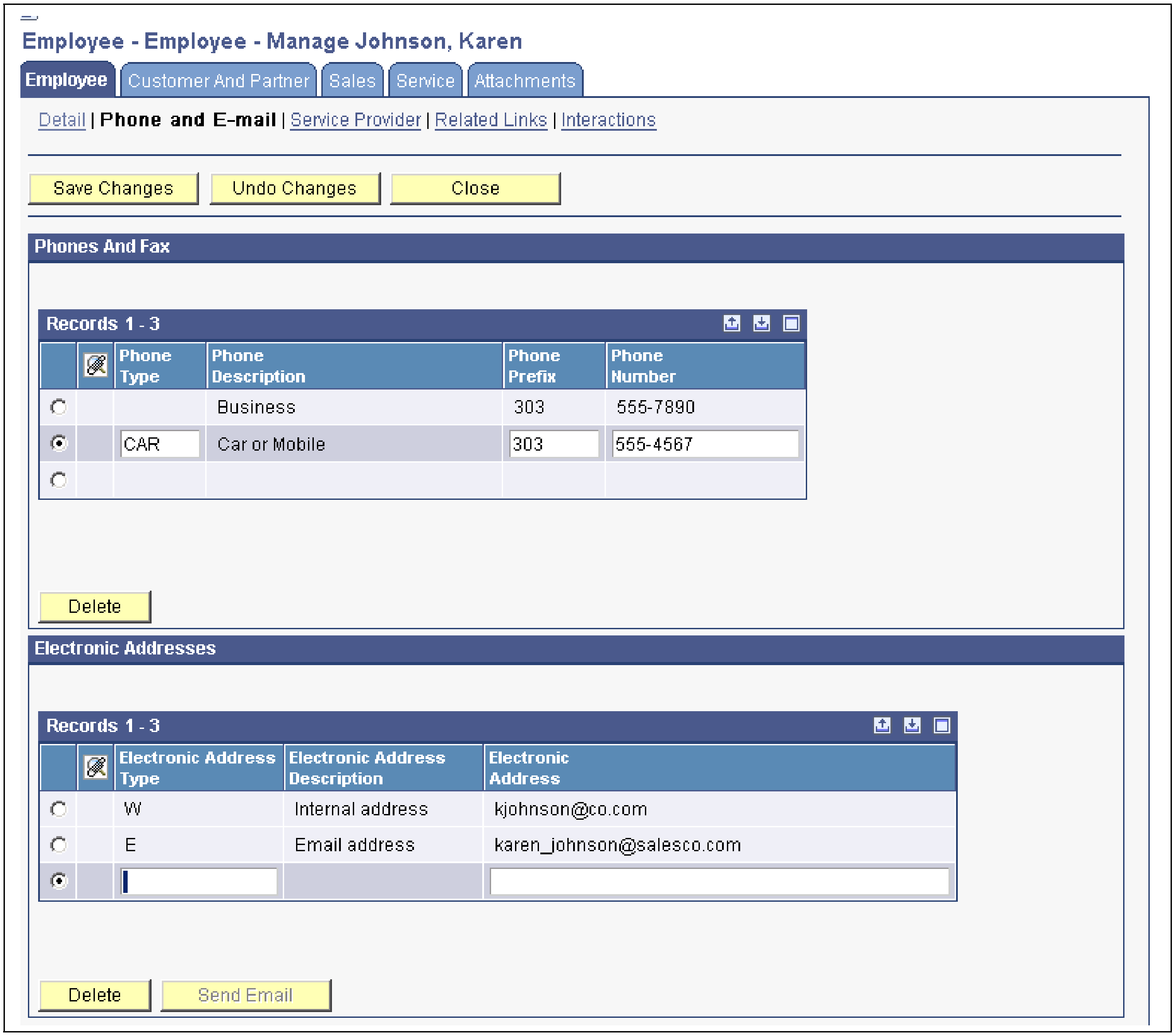
C: Phone

W: Address

P: Pager

Entering Additional Phone and Email Information for Employees

Access the Employee Phone and E-Mail for <Name> form.



Employee - Employee - Manage Johnson, Karen

Employee | Customer And Partner | Sales | Service | Attachments

Detail | **Phone and E-mail** | Service Provider | Related Links | Interactions

Save Changes | Undo Changes | Close

Phones And Fax

Records 1 - 3

		Phone Type	Phone Description	Phone Prefix	Phone Number
			Business	303	555-7890
		CAR	Car or Mobile	303	555-4567

Delete

Electronic Addresses

Records 1 - 3

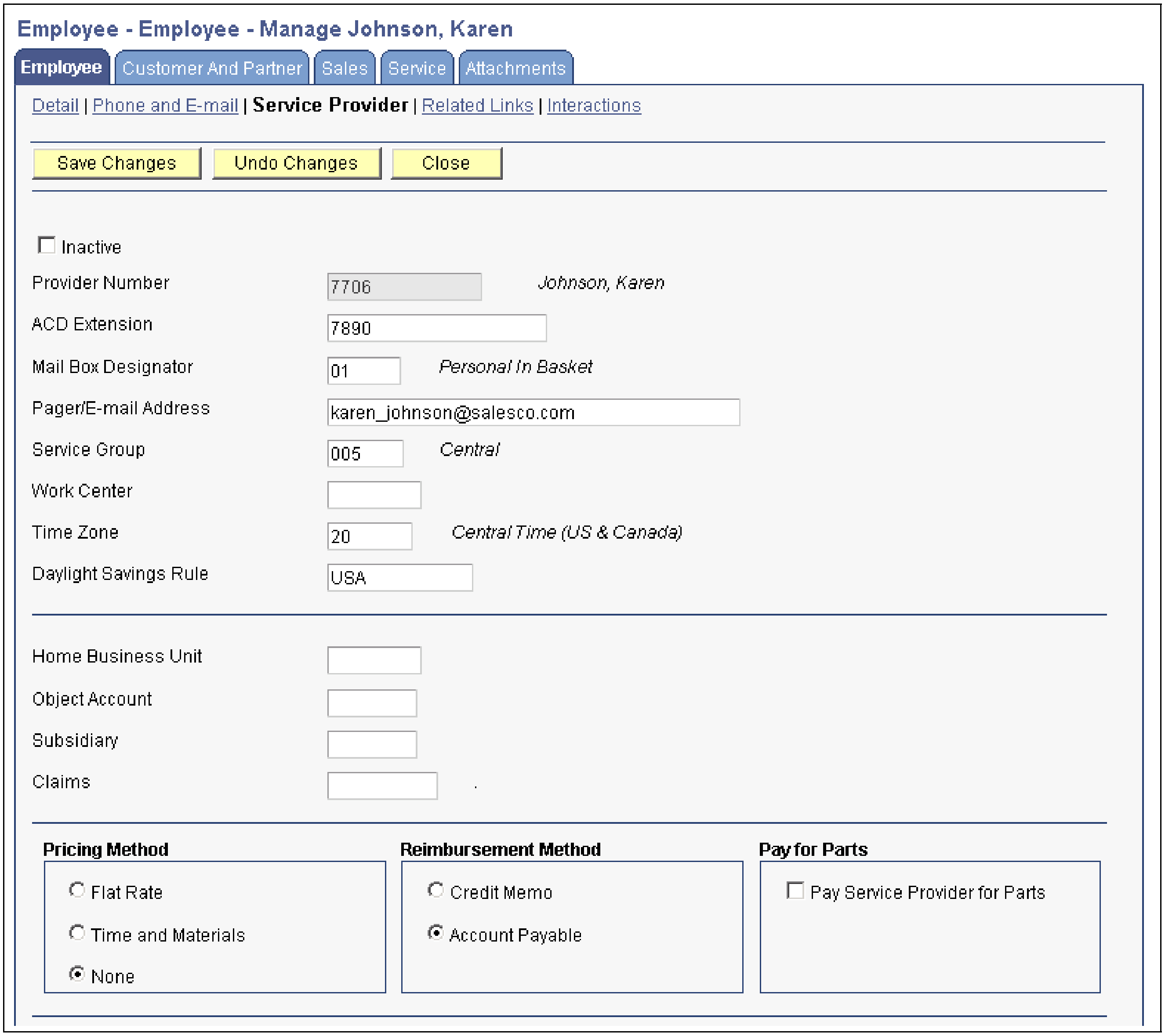
		Electronic Address Type	Electronic Address Description	Electronic Address
		W	Internal address	kjohnson@co.com
		E	Email address	karen_johnson@salesco.com

Delete | Send Email

Employee — Manage <Employee Name> form, Employee tab, Phone and E-mail

Setting Up Service Provider Information

Access the Employee - Manage <Employee Name> form, Employee tab. Click the Service Provider link.



Employee — Manage <Employee Name> form, Employee tab, Service Provider

ACD Extension

Enter the ACD phone extension to which incoming service calls that are associated with this employee should be routed.

Mail Box Designator

Enter the type of employee mailbox that the system uses to deliver messages associated with service calls.

Service Group

Enter the name of the service group to which the employee belongs. Service groups enable you to separate employees into groups using information such as region, type of service provided, or billing arrangements.

Work Center

Enter the business unit, or work center, to which the employee belongs.

Business unit security might prevent you from viewing information about business units for which you have no authority.

Daylight Savings Rule
Enter the daylight savings rule that is associated with the location in which the employee works. You use daylight savings rules to adjust time for a geographic or political locale.

Pricing Method
Specify the method that is used when charging customers for services provided by the employee. Values are:

F: Charges for labor are based on one flat rate. Charges for parts are already included in the flat rate.

T: Charges for labor are based on actual labor hours. Charges for parts are based on actual parts used.

Blank: The service provider is an internal service provider and should not be paid.

Enter a blank value only when you are defining the method of pricing for a service provider.

Reimbursement Mode
Specify how the system reimburses the service provider for a claim or how a claim is paid by a supplier.

For example, dealers can request payment for a claim through the standard accounts payable process, or they can request credits to their accounts receivable accounts.

Pay Service Provider for Parts
Specify whether the service provider should be paid for parts used during a repair. Values are:

Y or *1:* Pay the service provider for parts used.

N or *0:* Do not pay the service provider for parts used.

Assigning Partners to Employees

Access the Employee - Manage <Employee Name> form, Customer and Partner tab. Click the Partner link.

To assign partners to employees:

1. Click the Assign Partners button.
2. On Link Partners, search for and select the partners that you want to attach to the employee, and then click Select.

   The selected partners appear in the detail area of the form.
3. To remove a partner, click the Remove button.

Reviewing Parent Child Relationships

Access the Employee Parent Child Relationships form.

You use the Extended Search link to locate a single employee and navigate directly to that employee in the hierarchy view. When you have selected a single employee, you can click the Up One Level button to show the employee’s immediate supervisor in the tree, and the All records button to show all top level employees in the tree.

Setting Processing Options for the Employee Detail Program (P90CA040)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Display

These processing options specify how information is displayed on the employee entry forms.

1. Tax ID

Use this processing option to specify whether the employee's tax ID is displayed on the employee forms. Values are:

Blank: Display the field. (Default)

1: Hide the field.

2: Disable the field.

Versions

These processing options specify which versions of associated programs the system uses when processing CRM employee information.

1. Address Book (P01012) Version

Enter the version of the program that you want the system to use when processing CRM employee information. If you leave this option blank, the system uses ZJDE0001.

2. Customer Master (P03013) Version

Enter the version of the program that you want the system to use when processing CRM employee information. If you leave this option blank, the system uses ZJDE0001.

3. Supplier Master (P04012) Version

Enter the version of the program that you want the system to use when processing CRM employee information. If you leave this option blank, the system uses ZJDE0001.

4. Contact Information (P90CA070) Version

Enter the version of the program that you want the system to use when processing CRM employee information. If you leave this option blank, the system uses ZJDE0001.

5. Employee Detail Processing (P90CA043) Version

Enter the version of the program that you want the system to use when processing CRM employee information. If you leave this option blank, the system uses ZJDE0001.

Setting Processing Options for the Employee Processing Options Program (P90CA043)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

These processing options are used to specify default information about employees in your organization.

1. Search Type	Use this processing option to specify the default search type that appears when you enter an employee into the system. The default value is *E*.
2. Organizational Structure Type	Use this processing option to specify the default organizational structure that appears when you enter an employee into the system.
3. Employee Phone Number Type	Use this processing option to specify which type of phone number to display for the employee. The system retrieves the first phone number of this type from the F0115 table.
4. Relation Type	Use this processing option to specify the default value for the Relation Type field when you enter an employee. Typically, you enter the employee's assistant as the related person. This value is used to update the F01112 table for the assistant.
5. Assistant Phone Number Type	Use this processing option to specify the default value that appears in the Assistant Phone Number Type field when you enter an employee. This value is used to update the Assistant Phone Number Type in the Contact Phone Number table (F0115).

Versions

These processing options are used to specify program versions when entering employees.

1. Address Book MBF (P0100041) Version	Use this processing option to specify the version of the Address Book MBF (P010004) to use when entering employees. If you leave this field blank, the system uses version ZJDE0001.
2. Who's Who MBF (P0100087) Version	Use this processing option to specify the version of the Who's Who MBF (P0100087) to use when entering employees. If you leave this field blank, the system uses version ZJDE0001.
3. Opportunities (P90CB020) Version	Use this processing option to specify the version of the Manage Opportunities program (P90CB020) Version to use when entering employees. If you leave this field blank, the system uses version ZJDE0001.

CHAPTER 4

Managing Item Information

This chapter discusses how to:

- Search for items
- View item information
- Work with items

Searching For Items

This section provides an overview of item searching and discusses how to search for items.

Understanding Item Searching

When searching for items, you can search the system for all items or for a specific item, or you can limit the search by using a query.

Using queries limits the search and is useful if you frequently conduct the same type of search. For example, if you routinely search for items that have a particular stocking type, you can perform a search using a query that restricts the search to that stocking type.

See Also

PeopleSoft EnterpriseOne Tools 8.94 Foundation PeopleBook

Form Used to Search For Items

Form Name	Form ID	Navigation	Usage
Item Inquiry - Search For Items	W90CA100D	EnterpriseOne Menus, Customer Relationship Management, CRM Foundation, CRM Foundation Daily Processing (G90C01), Item Inquiry Or, EnterpriseOne Menus, Sales Force Automation, Periodic Sales Force Automation Processing (G90CA02), Item Inquiry	Search for and select items.

Searching For an Item

Access the Item Inquiry - Search For Items form.


Item Inquiry - Search For Items

Select Find Close Tools

2nd Item Number

Select a Query Save Query Edit Queries

Find

Records 1 - 20 Customize Grid

2nd Item Number	Description	Search Text	Stocking Type	Stocking Type Description	Description Line 2
10101	Cost Level 1	Cost Level 1			
10102	Cost Level 3	Cost Level 3			
10103	Kit	Inventory	K	Kit or Parent Item	
10104	Lot Item	Inventory	S	Stock End-Item	
10105	Non-Stock Item	Inventory	N	Non-Stock Item	
10106	Packaged Item	Inventory	S	Stock End-Item	
10107	Bulk Item	Inventory	S	Stock End-Item	
10108	Serial Item	Inventory	S	Stock End-Item	
4600	Multiples Stock Item #1	Multiples Stock Item #1	S	Stock End-Item	
4601	Multiples Stock Item #2	Multiples Stock Item #2	S	Stock End-Item	
1001	Bike Rack - Trunk Mount	Bike, Rack	P	Purchased inc. Raw Material	
210	Mountain Bike, Red	Bike, Mountain	P	Purchased inc. Raw Material	
230	Youth Sport Bike	Bike, Youth Sport	P	Purchased inc. Raw Material	

Search For Items form

To search for an item:

1. Click Find to locate all available items.

   To limit the search and reduce search results, enter one or more fields in the grid.

2. When you locate the item that you want to view, select its radio button and click Select.

   Alternatively, select the item by clicking its link under the 2nd Item Number column.

2nd Item Number	Enter the item's 2nd item number, which is a 25-digit, user defined, alphanumeric item number.
Description	Enter a brief description, remark, or explanation for the item.
Search Text	Enter the search string that the system uses to search for the item. Search text might be a category, department, or classification.
Stocking Type	Enter the user-defined code that indicates how the item is stocked, such as finished goods or raw materials.
Description Line 2	Enter a second, 30-character description, remark, or explanation for the item.
3rd Item Number	Enter the item's third item number, which is another 25-digit, free-form, user defined alphanumeric item number.
Short Item No	Enter the item's inventory number.

Viewing Item Information

This section provides an overview of how to view existing item information and discusses how to:

- View item detail information.
- View item partner information.
- View opportunity information.
- View related objects.

Understanding Item Viewing

After you search for and select an item, you can view the following item information:

- An image of the item (if one was added during item entry).
- Item pricing information.
- Item availability from branch/plants.
- A description of item features.
- Partners who sell or support the item.
- Opportunities associated with an item.
- Attachments for the item.
- Scripts or solutions created for the item.

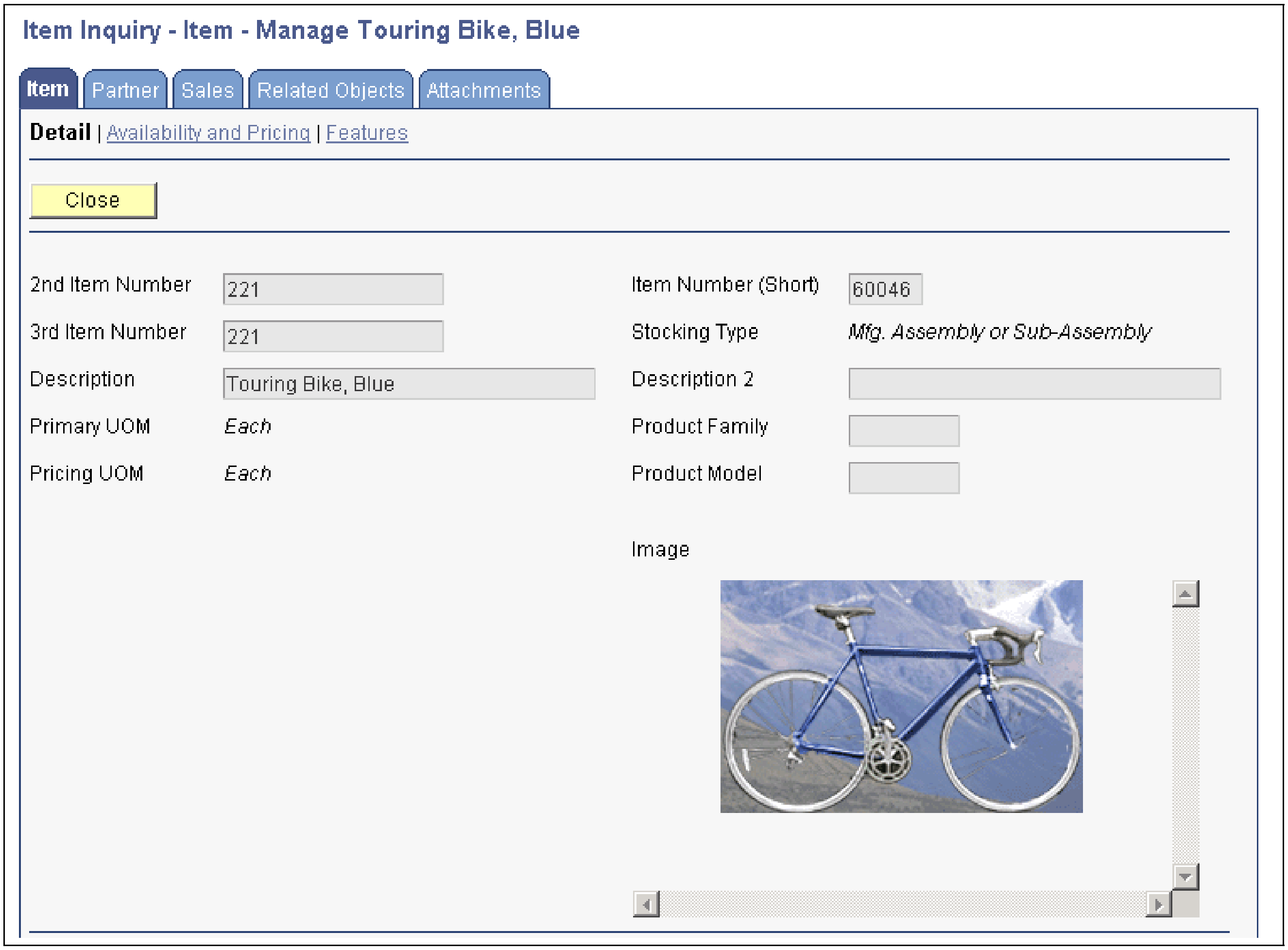
Item information is viewable on sub-forms by clicking one of the tabs or links. You can move from one sub-form to another, but as soon as you click the Close button on any sub-form you will return to the item search entry form.

Forms Used to View Item Information

Form Name	Form ID	Navigation	Usage
Item Inquiry - Item - Manage <item name> Detail (Item tab)	W90CA100B	From Search For Items, select the Select button after selecting an item.	View item detail.
Item Inquiry - Item - Manage <item name> Availability and Pricing (Item tab)	W90CA101A	On the Item tab, select the Availability and Pricing link.	View information related to item availability and pricing.
Item Inquiry - Item - Manage <item name> Features (Item tab)	W90CA102A	On the Item tab, select the Features link.	View item feature descriptions and category information.
Item Inquiry - Item - Manage <item name> Partner	W90CA109A	Select the Partner tab.	View partner information or assign a partner to the item.
Item Inquiry - Item - Manage <item name> Opportunity	W90CA108A	Select the Sales tab.	Find and select sales information related to the item.
Item Inquiry - Item - Manage <item name> Scripts	W90CA107A	Select the Related Objects tab.	View scripts related to the item.
Item Inquiry - Item - Manage <item name> Scripts	W90CA105A	On the Related Objects tab, select the Solutions link.	View solutions related to the item.
Item - Manage <item name> Attachments	W90CA104A	Select the Attachments tab.	Add an attachment to the item.

Viewing Item Detail Information

Access the Search For Items form.



Item Inquiry form: Detail tab

1. Find and select the item whose information you want to view.

   The Item Inquiry Detail form appears.

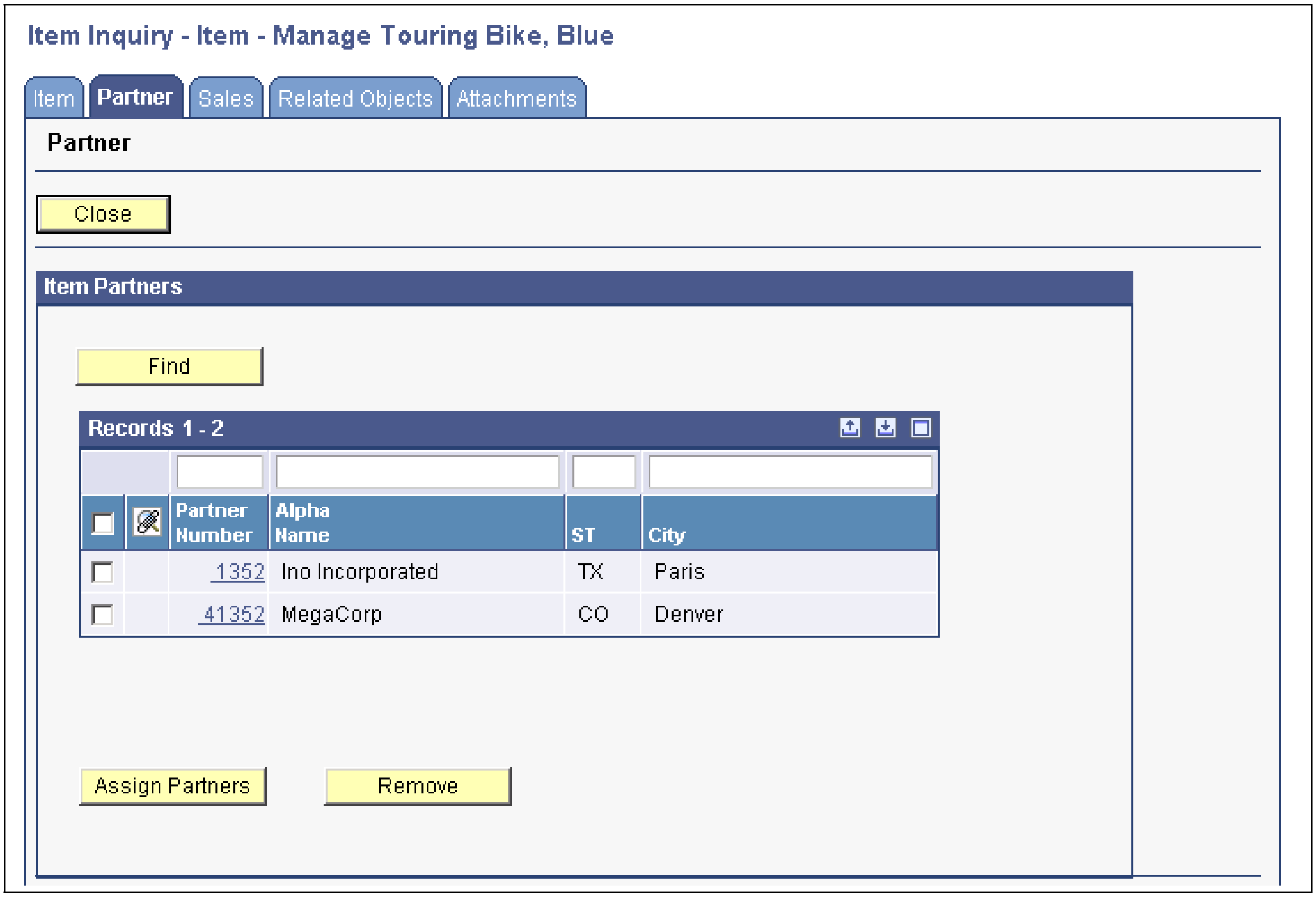
2. If pricing and availability information is available for the selected item, you can view the information by selecting the Availability and Pricing link.

3. If detailed feature information is available for the selected item, you can view the information by selecting the Features link.

4. Click Close when you are finished viewing item detail information.

Viewing Item Partner Information

Access the Item Inquiry - Item Manage <item name> form.



Item Inquiry - Item Manage <item name> form: Partner tab

1. Select the Partner tab.

   A list of partners currently associated with the item appears.

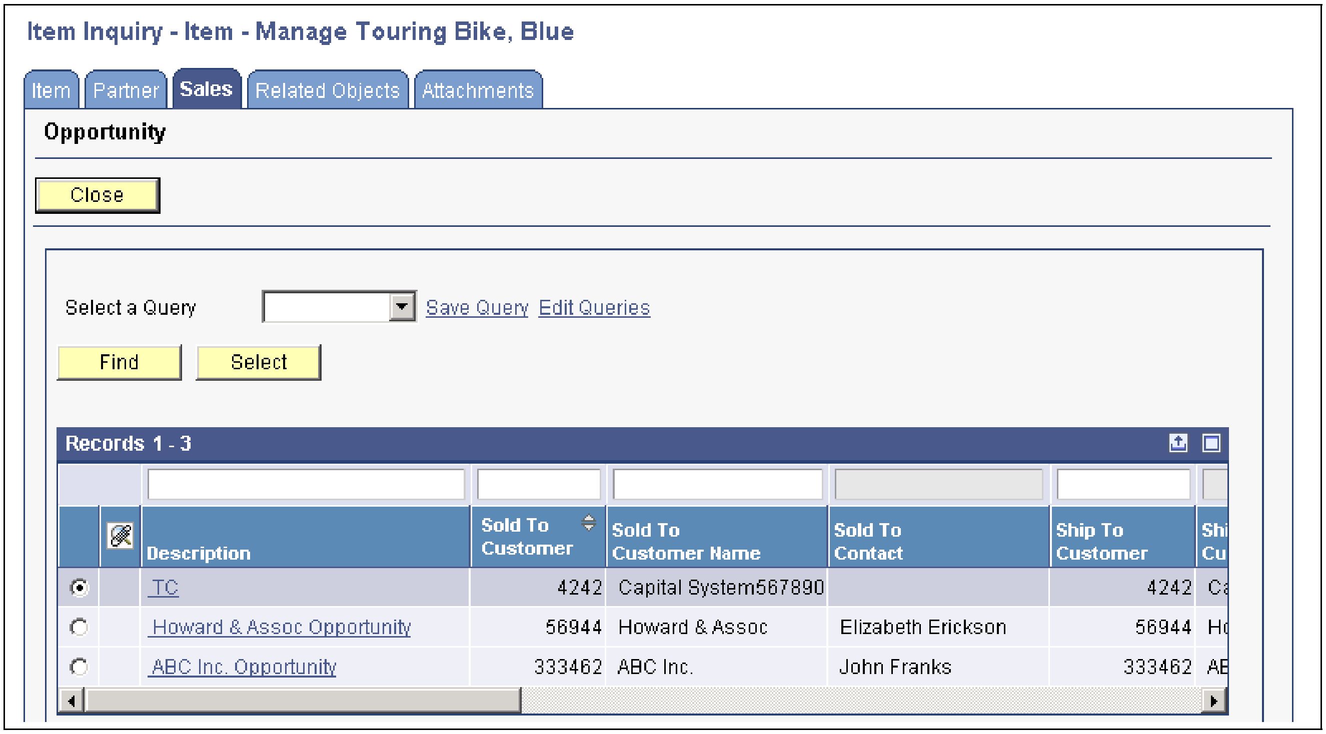
2. If multiple partners are assigned to the item, locate a specific partner by entering the partner's information in one of the grid fields and then clicking Find.

3. To remove a partner currently associated with an item, select the partner that you want to remove and click Remove.

Partner Number	Enter the address book number for the partner associated with the item.
Alpha Name	Enter up to 40 characters to describe the partner. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.

Viewing Opportunity Information

Access the Item Inquiry - Item Manage <item name> form.



Item Inquiry - Item Manage <item name> form: Sales tab

1. Select the Sales tab.

   A list of opportunities currently associated with the item appears.

2. If multiple opportunities are associated with the item, locate a specific opportunity by entering its information in one of the grid fields and then clicking Find.

3. To view detailed information about an opportunity through the Manage Opportunity application, select the radio button by the opportunity and click Select.

   Alternatively, you can click the opportunity’s link under the Description column.

Description Enter a brief description of the opportunity.

Sold To Customer View the name of the customer to whom the item was sold.

Customer Name View the customer’s name.

Sales Cycle View the name of the sales cycle currently associated with the record, such as *Proposal, Purchase Bid, Won Business,* and so on.

% View the percentage of probability that the sale will complete. This percentage amount is used with the potential amount to calculate the pipeline amount.

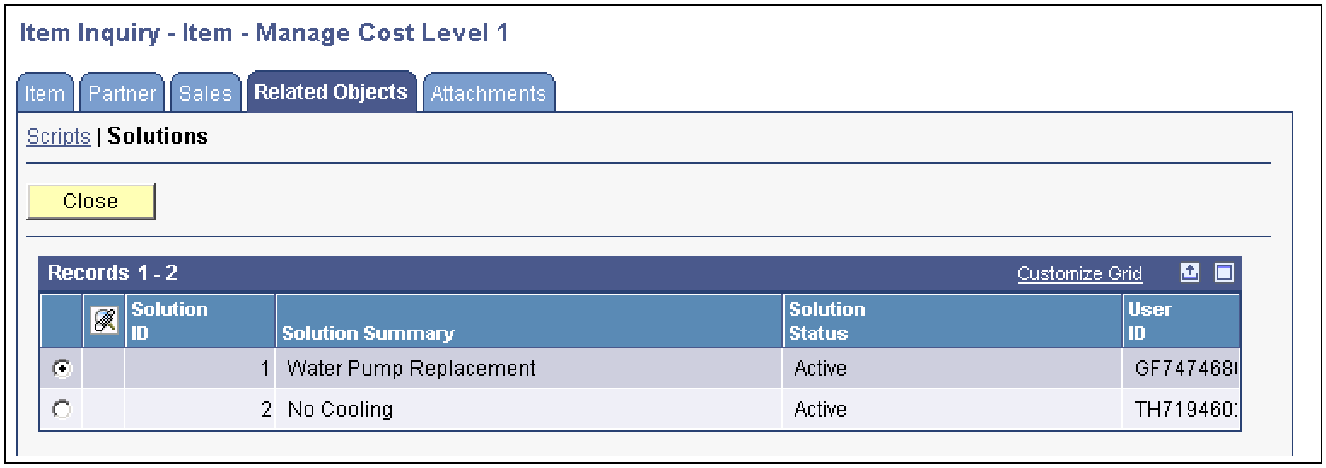
Close Date View the date that the opportunity is projected to close.

Potential Amount View the potential revenue that the opportunity will generate.

Opportunity Number View the unique identifier related to the opportunity.

Viewing Related Objects

Access the Item Inquiry - Item Manage <item name> form.



Item Inquiry - Item - Manage <item name> form: Related Objects tab

1. Select the Related Objects tab.
2. If scripts were created for the item, locate and view a specific script by entering its information in one of the grid fields and then clicking Find.
3. Click the Solutions link to view solutions for the item.

   If solutions were created for the item, the solution ID, summary, status, and user ID are displayed.

Script ID	View the number that uniquely identifies the script.
Script Name	View the name of the script.
Effective Date	View the date on which the script is available for use.

Working With Items

This section provides an overview of working with items and discusses how to:

- Assign a partner to an item.
- Change an item’s opportunity information.
- Add an attachment to an item.

Understanding Working With Items

Some of the item forms that appear when you select a tab enable you to do more than view an item’s existing information. You can also assign a partner to an item, change information for an opportunity associated with an item, or add an attachment to an item.

When entering information for an item, you use the same forms that you used for viewing item information.

As you add new partners that sell or support an item, you can easily assign a partner to an item. The next time that you search for that item, you can see the partner’s information on the Partner tab.

Changes to an item's opportunity information are performed through the Opportunity Management application, which you can access from the Item Inquiry form's Sales tab. On the Opportunity form, you can also convert the opportunity to a quote or a sales order. Note that the opportunity must be previously created and associated with the item, which you can do through the Opportunity Management application.

When you add a text attachment to an item, the text that you enter appears on the item's Detail tab as a long description.

Assigning a Partner to an Item

Access the Item Inquiry - Item Manage <item name> form.

1. Select the Partner tab.

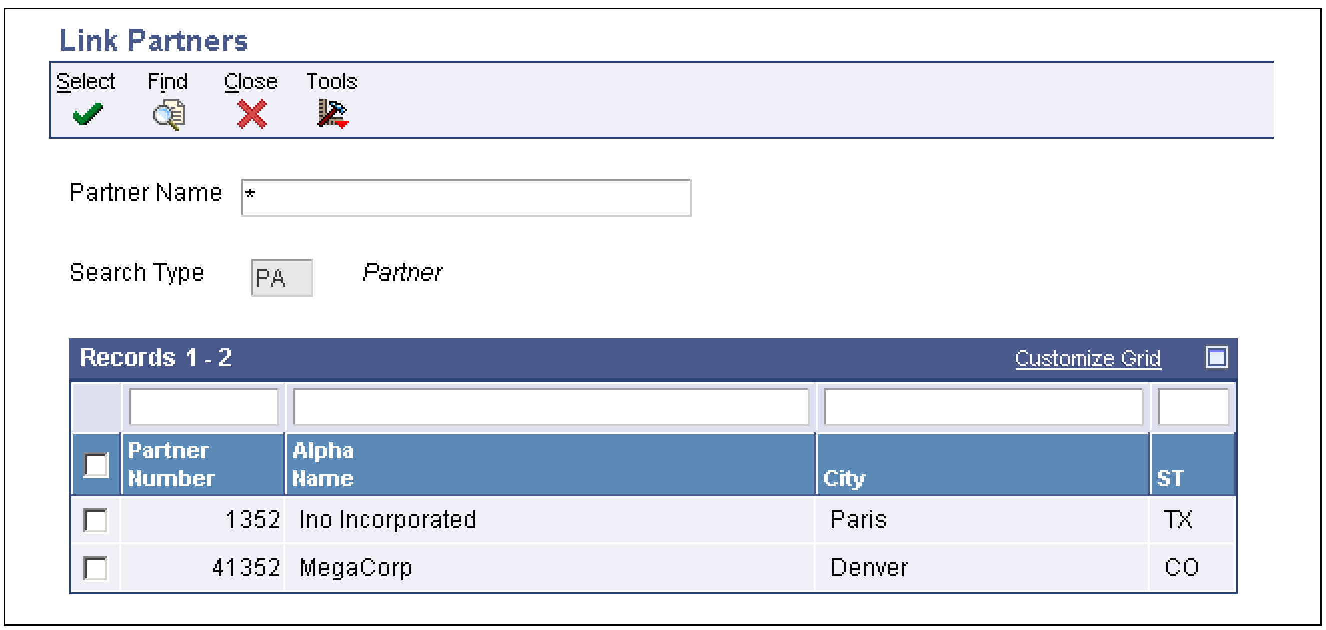
   If any partners are already assigned to the item, they will appear in the form grid.

2. To assign a new partner to the item, click Assign Partner.
3. On the Link Partners form, click Find to view a list of partners.

   If you know a partner's number, name, state, or city, you can enter that information in the grid and search for a specific partner.

4. Select the partner that you want to assign to the item, and then click Select.

If you want to remove a partner's association with an item, you can do so on the Item Inquiry - Item Manage <item name> form by selecting the Partner tab, finding and selecting the partner, and then clicking Remove.



Link Partners form

Changing an Item's Opportunity Information

Access the Item Inquiry - Item Manage <item name> form.

1. Select the Sales tab.

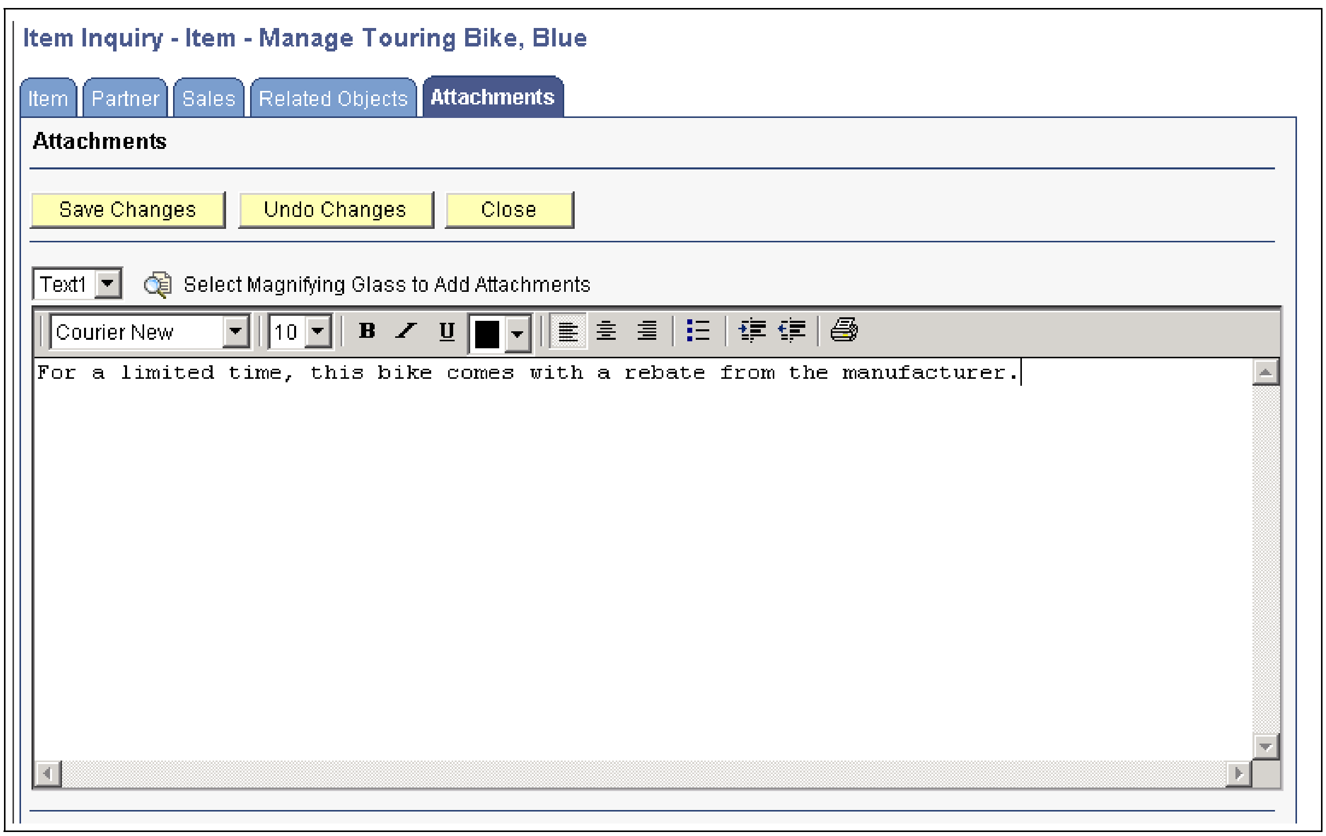
   Any opportunities that are currently associated with the item appear.

2. If several opportunities exist, enter opportunity information such as the description, customer name, or opportunity number in the grid, and then click Find to locate a specific opportunity.
3. Select the opportunity whose information you want to view, and then click Select.

   Alternatively, you can click the Opportunities link under the Description column. After you select an opportunity, the Opportunity Detail form appears.
4. On the Opportunity Detail form, modify opportunity information as needed.
5. After you finish modifying opportunity information, select one of the following options that corresponds to the action that you want to perform:
   - Save Changes
   - Undo Changes
   - Convert to Quote
   - Convert to Sales Order
   - Close

Adding an Attachment to an Item

Access the Item Inquiry - Item - Manage <item name> form.



Item Inquiry - Item - Manage <item name> form: Attachments tab

1. Select the Attachments tab.
2. To create a text attachment, type the text in the text window.

This feature incorporates standard word-processing features; you can change the font and size, add emphasis such as bold, italics, and underline, use bullets, and so on.

3. Click Save Changes to save the text attachment.
4. To create a different type of attachment, such as a Microsoft Word or Excel file, a Website URL, or an OLE object, click the magnifying glass button to access the Media Objects application.
5. When you are finished adding attachments, click the Save Changes button.

   To continue without saving changes, click Undo Changes.

See *PeopleSoft EnterpriseOne Tools 8.94 Foundation PeopleBook*

CHAPTER 5

Using the Item Catalog Application

This chapter provides an overview of the Item Catalog application and discusses how to:

- View catalogs and add items.
- Create catalogs.

Understanding Catalogs

The Catalog application enables you to view catalog information and add catalog items to a sales order, quote, opportunity, or lead.

The Catalog application provides the following features for all CRM, sales, support, and service users:

- Locate catalog items quickly.
- View catalog item information such as the item description, stocking type, unit of measure, product model, and product family.
- View a catalog item's list of features, availability, and base price.
- View the opportunities and partners associated with a catalog item.
- View catalogs in single select or multiple select mode.
- Associate an entire catalog to a lead, opportunity, quote, or sales order.

Accessing the Catalog Application

You can view catalogs by selecting Item Catalog from the EnterpriseOne menu. And, because the Catalog application is integrated into other EnterpriseOne applications, you can access item catalogs from the Sales Order, Quote Order, Opportunity, and Lead applications.

Functionality might vary slightly depending on where you access the catalog. For example, when you access the Catalog application from a sales lead, you can select only catalogs. You can't select an item until after the lead qualifies and becomes an opportunity. After the lead has been converted to an opportunity, you can select either an item number or a catalog. After the opportunity becomes a quote or a sales order, you can select an item only from the catalog.

Catalog Single Select and Multiple Select Modes

In *single select* mode you can select a single item or catalog. When you are in single select mode, the left portion of the screen shows the selected catalog, and the right portion of the screen shows a list of selectable items and catalogs. You can select either a single catalog or a single catalog item when you are in single select mode.

In *multiple select* mode, you can quickly select multiple items or catalogs. In multiple select mode, you can browse through and select items from different catalogs. When using multiple select mode for items, you must specify the desired quantity for each item on the right side of the form. If you want to use a different catalog, select the catalog from the left side of the form and enter item quantities for that catalog's items on the right side of the form.

In either mode, after you make your selections and exit from the catalog form, your choices will be returned to the application from which you accessed the Catalog function. For example, when you access Catalog from the Sales Order application, the items that you selected on the catalog form will be added to the active sales order.

The following table summarizes the various catalog access points, the selection modes, and selection choices:

Entry Point	Selection Mode	Selection Choices
From the Leads application: On the Lead - Manage <lead name> form's Lead tab, click the Product Interest link and then click the visual assist at the Description field.	Single select mode	Select catalogs only
From the Leads application: On the Lead - Manage <lead name> form's Lead tab, click the Product Interest link and then click the Assign Product Interest button.	Multiple select mode	Select catalogs only
From the Opportunity application: On the Opportunity Manage <opportunity name> form's Detail tab, click the visual assist for the Product Catalog or Item Number fields.	Single select mode	Select items or catalogs
From the Sales Order application: On the Sales Order - Edit Sales Order form's Sales Order Header tab, select Product Catalog from the Go To: drop-down menu.	Multiple select mode	Select items only
From the Sales Order application: On the Sales Order - Edit Sales Order form's Sales Order Detail tab, select Product Catalog from the More Row Actions: drop-down menu.	Single select mode	Select items only
From the Quote Order application: On the Quote Order - Edit Sales Order form's Sales Order Header tab, select Product Catalog from the Go To: drop-down menu.	Multiple select mode	Select items only
From the Quote Order application: On the Quote Order - Edit Sales Order form's Sales Order Detail tab, select Product Catalog from the More Row Actions: drop-down menu.	Single select mode	Select items only

Navigating Through the Catalog Hierarchy

Catalogs are displayed on the left side of the form in a tree format. This means there are sub-catalogs, sub-sub-catalogs, and so on. You can expand a level by clicking the plus sign, or collapse a level by clicking the minus sign. When you are several levels down, you can click Up One Level or Top Level to go immediately up one level or to the highest level, respectively.

Regardless of which level you are on, the right side of the form always shows items for the currently selected catalog. As you move through the various levels of catalogs, the right side of the form changes to reflect the items available from the catalog selected on the left side of the form.

Advanced Catalog Searches

The Advanced Catalog Search link enables you to perform an advanced search for catalogs. This feature is particularly useful for quickly finding and selecting catalogs if you have multiple catalogs and don't want to locate a specific catalog by scrolling through a list of catalogs.

When you select the Advanced Catalog Search link, a new form appears. On this form you can see the available catalogs, as well as a catalog path for each catalog name, which provides context.

Advanced Item Searches

The Advanced Item Search link enables you to perform an advanced search for specific items. This feature enables you to quickly locate and select catalog items without having to locate them by scrolling through catalog pages.

When you select the Advanced Item Search link, a new form appears. On this form you can search for items in all catalogs rather than first selecting a catalog and then trying to locate the item. On the Item Search and Select form, you can enter item information in the form's grid to restrict the search.

Viewing Catalogs and Adding Items

This section discusses how to:

- Set processing options for the Catalog Application (P90CA106).
- Use Catalog from Sales Order or Quote Order.
- Use Catalog from Opportunities.
- Use Catalog from Leads.
- Perform an advanced item search.
- Perform an advanced catalog search.

Forms Used to View and Add Catalog Items

Form Name	Form ID	Navigation	Usage
Edit Sales Order	W42101D	EnterpriseOne Menus, Sales Force Automation, Sales Force Automation Daily Processing (G90CA01), Sales Order On Manage Existing Order, find and select an existing sales order.	Access the item catalog when editing a new sales order.
Enter New Order	W42101D	EnterpriseOne Menus, Sales Force Automation, Sales Force Automation Daily Processing (G90CA01), Sales Order Click Add on Manage Existing Order to create a new order.	Access the item catalog when creating a new sales order.
Quote Order - Edit Sales Order	W42101D	EnterpriseOne Menus, Sales Force Automation, Sales Force Automation Daily Processing (G90CA01), Quote Order On Quote Order - Manage Existing Order, find and select an existing quote.	View catalog items and specify item quantity for a quote.
Quote Order - Enter New Order	W42101D	EnterpriseOne Menus, Sales Force Automation, Sales Force Automation Daily Processing (G90CA01), Quote Order Click Add on Quote Order - Manage Existing Order to create a new order.	View catalog items and specify item quantity when creating a new quote.
Opportunity - Opportunity - Manage <opportunity name>	W90CB020A	EnterpriseOne Menus, Sales Force Automation, Sales Force Automation Daily Processing (G90CA01), Opportunity On Opportunity - Search for Opportunities, find and select an existing opportunity.	Find and select an opportunity.

Page Name	Object Name	Navigation	Usage
Select From Catalog	W90CA106B	EnterpriseOne Menus, Customer Relationship Management, CRM Foundation, CRM Foundation Daily Processing (G90C01), Item Catalog Or, EnterpriseOne Menus, Customer Relationship Management, Sales Force Automation, Periodic Sales Force Automation Processing (G90CA02), Item Catalog Or, select Product Catalog from the Go To drop-down list.	View catalog items and specify item quantity for a sales order.
Item Search & Select	W40ITM1A	Click the Advanced Items Search link on the Search From Catalog form.	Find and select catalog items.
Catalog Search & Select	W90CA106C	Click the Advanced Catalogs Search link on the Search From Catalog form.	Find and select a catalog.

Setting Processing Options for the Catalog Application (P90CA106)

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

Default

Organization Structure Type Use this processing option to specify a default value for the Organizational Structure field on the Item Catalog Search and Select form.

Using Catalog from Sales Order or Quote Order

Access Edit Sales Order or Enter New Order for a sales order, or Quote Order - Enter New Order for a quote.

1. If you are entering a new sales order or quote, enter order information on the Sales Order Header tab.
2. Select Product Catalog from the Go To field, and then click the arrow to the right of the drop-down list box.
3. On Select From Catalog, browse through catalogs by expanding or compressing the tree structure on the left side of the form.

   View catalog items on the right side of the form.
4. If desired, specify quantities for items you want to add to the sales order or quote.

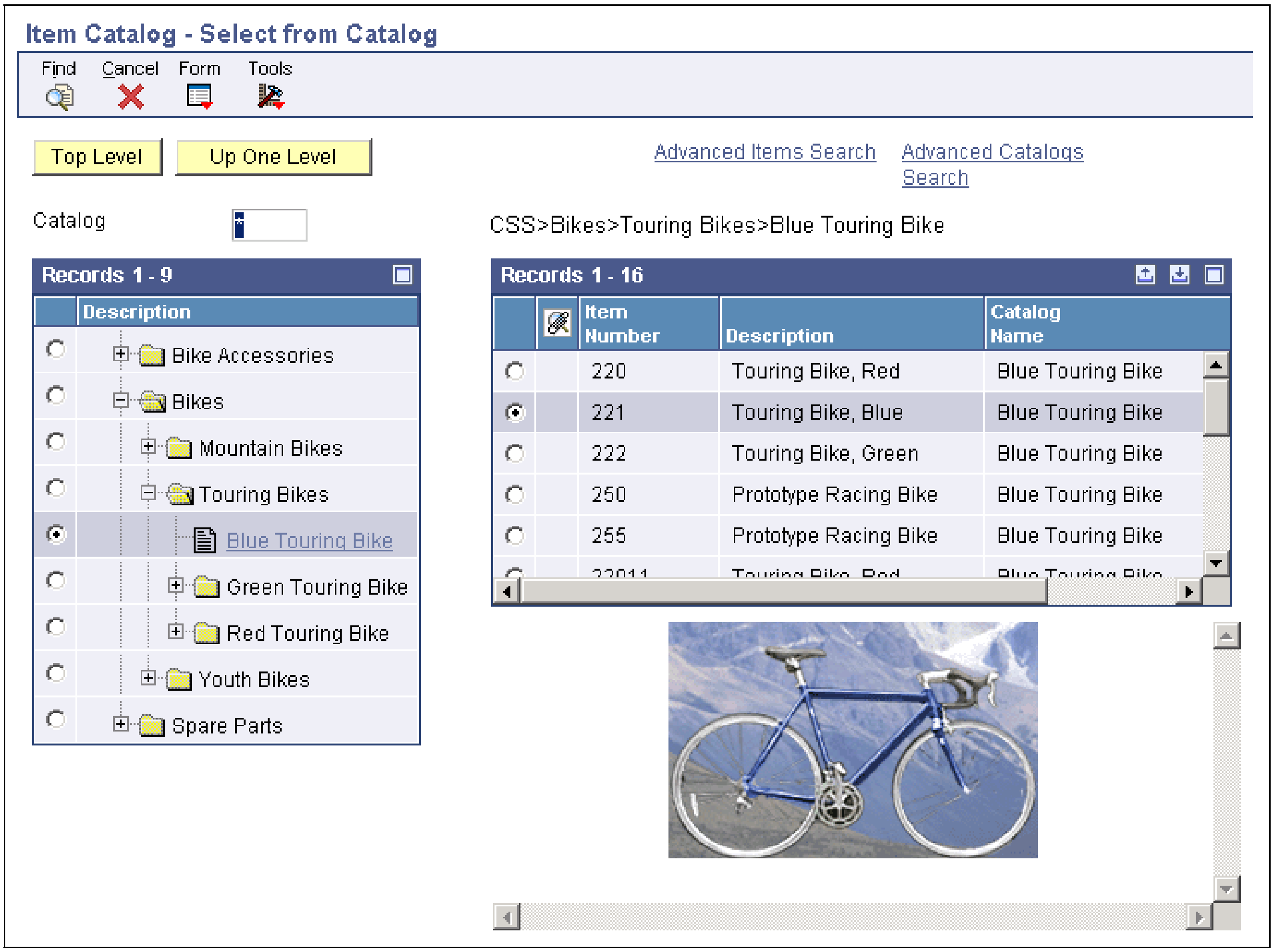
   When you access the Catalog application using the Go To field you are in multiple-selection mode, so you can add multiple items to the order or quote before exiting the Catalog application.
5. Click OK to save the changes, or click Cancel to exit without saving.

6. Alternatively, you can view catalog items in single-selection mode by accessing the item catalog from the Sales Order Detail tab on the Edit Sales Order, Quote Order - Edit Sales Order, and Enter New Order forms by selecting a blank line in the grid.

   If you are adding a new sales order or quote, you must first enter at least the item quantity on the blank line in the grid to enable the More Row Actions field.

7. Select Product Catalog from the More Row Actions field, and then click the arrow to the right of the drop-down list box.

   If you want to add items after closing the catalog, you can do so in the Sales Order Detail's grid area by using the visual assist at the Item Number fields.

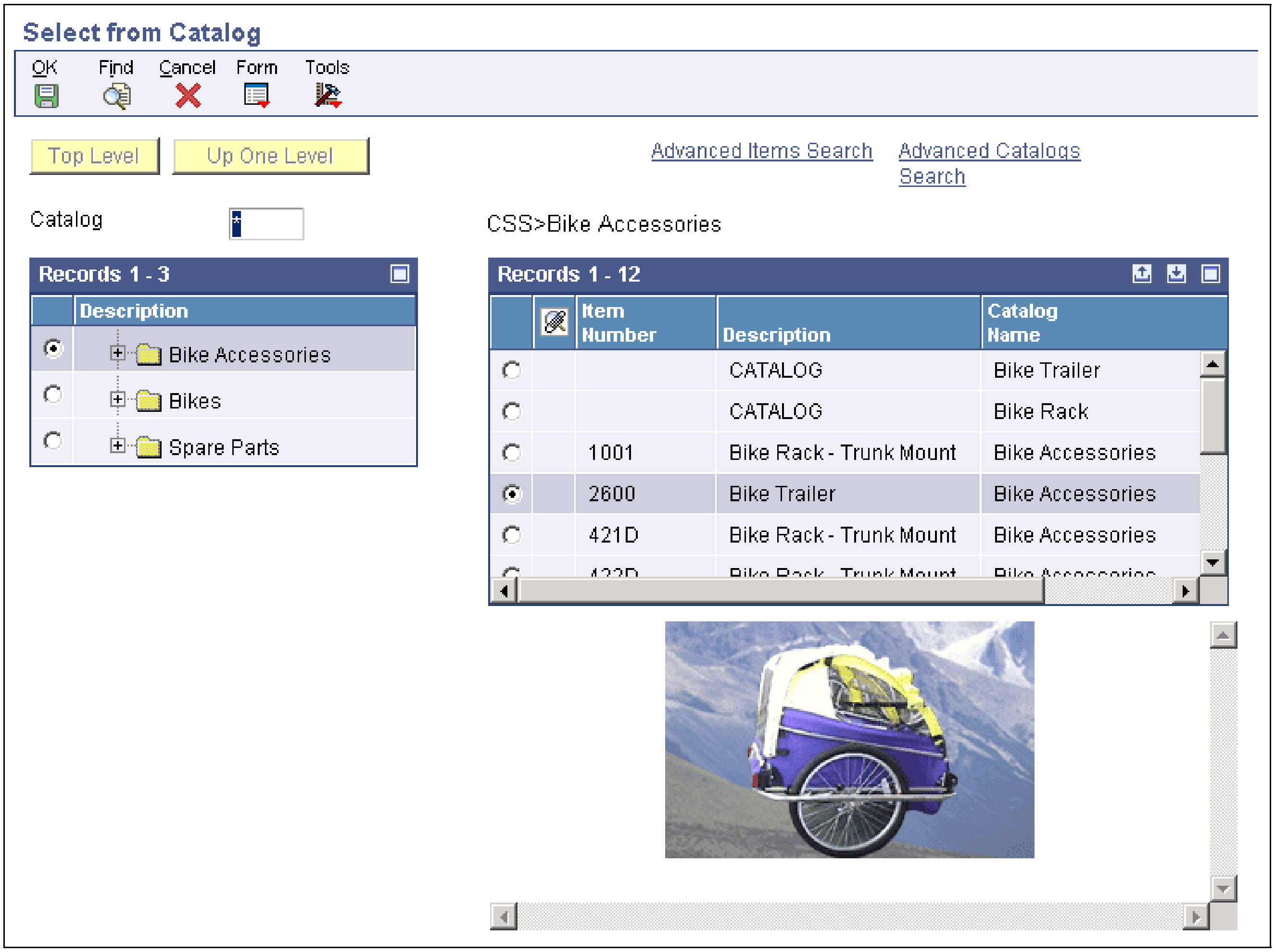


Select from Catalog form

Using Catalog from Opportunities

Access Opportunity - Opportunity - Manage <opportunity name>.

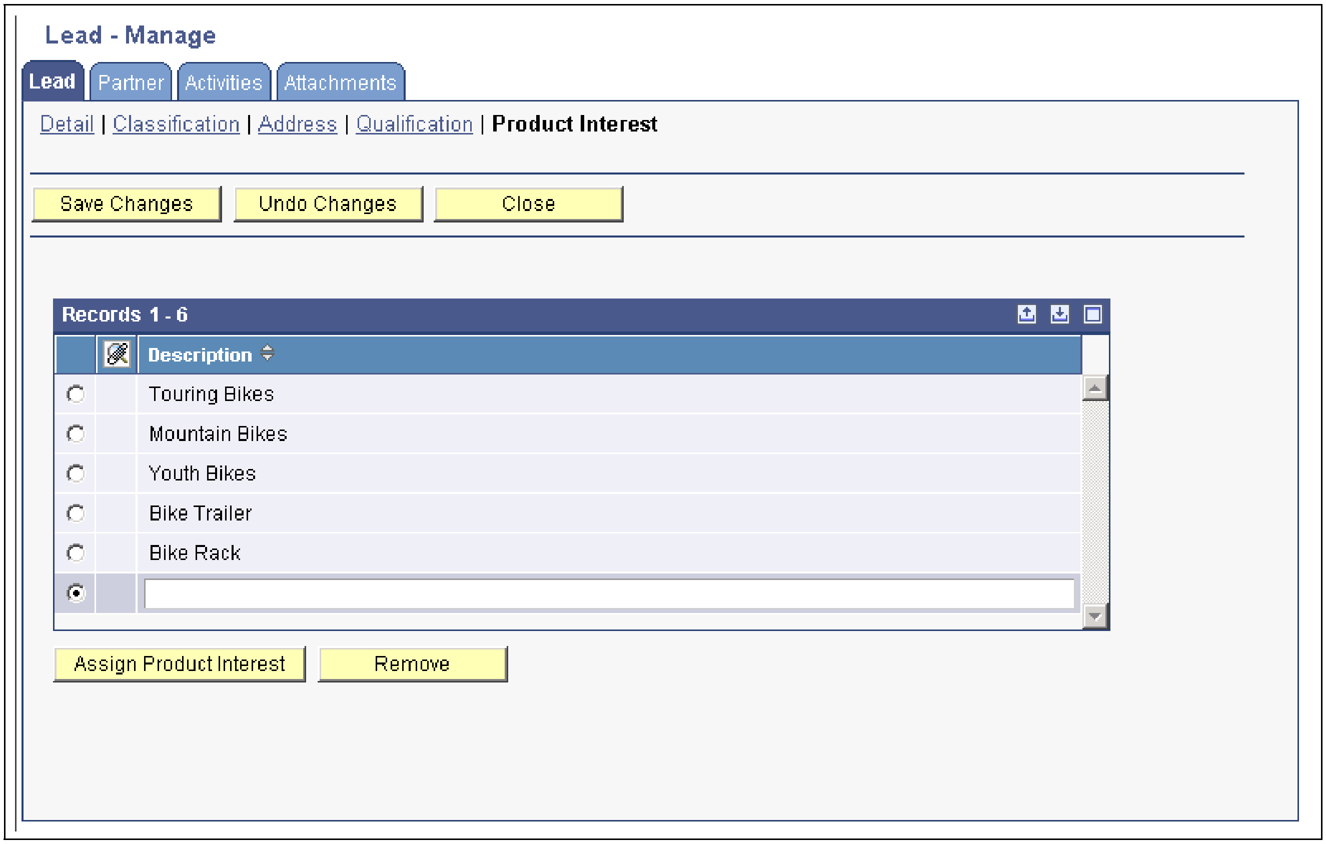
1. On the grid located on the lower portion of the form, click the visual assist at the Product Catalog field.
2. On Select From Catalog, find and select the item that you want to add to the opportunity.
3. To add additional items to the opportunity, select a blank grid line on Opportunity - Opportunity - Manage <opportunity name> and repeat steps 1 and 2.



Select From Catalog form: Single Selection mode

Using Catalog from Leads

Access Lead - Lead - Manage <lead name>



Lead - Manage Form Product Interest link

1. Click the Product Interest link.
2. To add to any products already displayed for the lead, click the Assign Product Interest button.

   The Catalog application opens in multiple select mode.

   Alternatively, to add a single item you can open the Catalog application in single select mode by selecting a blank line and then clicking the visual assist button at the Description field. (If you click the Description field's visual assist button for an item already associated with the lead, you can only view catalog information; you cannot add an item to the lead.)
3. On Select From Catalog, find and select the items that you want to add to the lead.

Performing an Advanced Item Search

Access the Item Search & Select Form.

Item Catalog - Item Search & Select

Select Find Close Row Form Tools

Records 1 - 20 Customize Grid

Search Text	Item Number	Description	Description Line 2	Ln Ty	Flash Message
MK Item	288	MK Item	Miriam's XBP Item Don't Change	S	
Multiples Non-Stock Item #3	4603	Multiples Non-Stock Item #3		MB	
Bike	7224	Seat Post, BB		S	
Multiples Non-Stock Item #5	4604	Multiples Non-Stock Item #5		MB	
Multiples Stock Item #3	4602	Multiples Stock Item #3		S	
E-CRM Item	10000	E-CRM Item		S	
Cost Level 1	10101	Cost Level 1			
Cost Level 3	10102	Cost Level 3			
Inventory	10103	Kit		S	
Inventory	10104	Lot Item		S	
Inventory	10105	Non-Stock Item		S	
Inventory	10106	Packaged Item		S	
Inventory	10107	Bulk Item		S	
Inventory	10108	Serial Item		S	
Multiples Stock Item #1	4600	Multiples Stock Item #1		S	
Multiples Stock Item #2	4601	Multiples Stock Item #2		S	
Bike, Rack	1001	Bike Rack - Trunk Mount		S	
Bike, Mountain	210	Mountain Bike, Red		S	

Item Search & Select form

Search Text	Enter the name of the item that you want to locate. You can enter the whole name or part of a name.
Item Number	Enter the number associated with the item.
Description	Enter a brief information of the item.
Description Line 2	Enter a second description of the item.
Ln Ty (line type)	Enter the code indicating the item's line type, such as stock item, nonstock item, miscellaneous, and so on.
Flash Message	Enter the flash message text that appears when you use the item on an order.
Sls Cd1 – Sls Cd5 (sales code 1–sales code 5)	Enter category codes for the item. These codes are used for sales coding purposes to represent color, material content, or use.
Comm Class (commodity classification)	Enter a commodity code that represents an item's property type or classification, such as commodity type, planning family, or so on.
Sub Comm	Enter a commodity sub-code that represents an item's property type or classification, such as commodity type, planning family, or so forth.
Rebate Code	Enter the item's rebate code, if any.
Plan Fmly (planning family)	Enter the item's master planning family, a user-defined code (41/P4) that represents a property type or classification, such as commodity type or planning family.

Cost Rule	Enter the item's purchasing category code, which indicates the landed cost rule for an item. The landed cost rule determines purchasing costs, such as broker fees or commissions, that exceed the actual price of an item.
Drawing Number	Enter the item's engineering drawing number. This number might be the same as the part or item number.
Rev No (revision number)	Enter the item's revision number.
3rd Item Number	Enter the item's third number, which is a 25-digit, free-form, user-defined alphanumeric number.
Short Item No (short item number)	Enter the inventory item number.
Segment 1–Segment 10	Enter up to ten segments for a segmented item. The sum of the segments must not exceed 25 characters.
Template	Enter a template name to use when entering items through the Item Master Revisions application (P4101).

Performing an Advanced Catalog Search

Access the Catalog Search & Select form.

Catalog Search & Select form

Catalog Name	Enter the name of the catalog that you want to locate.

Catalog Path View the navigation to the catalog’s location.

Creating Catalogs

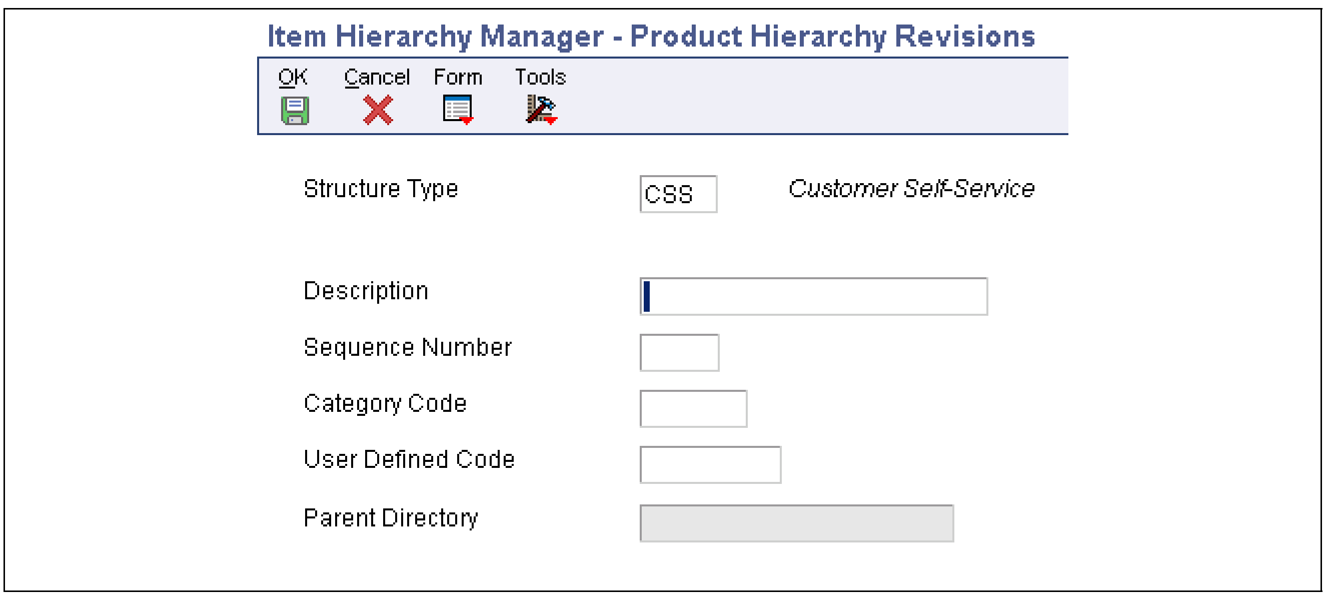
This section discusses how to create a new catalog.

Forms Used to Create Catalogs

Form Name	Form ID	Navigation	Usage
Item Hierarchy Manager	W4101HD	EnterpriseOne Menus, Customer Relationship Management, Sales Order Management, Sales Order Management Setup (G4241), Item Hierarchy Manager	View catalog hierarchy and add or delete catalogs.
Item Hierarchy Manager - Product Hierarchy Revisions	W4101HE	Click Add on Item Hierarchy Manager.	Add a new catalog.

Creating a New Catalog

Access the Item Hierarchy Manager - Product Hierarchy Revisions form.



Item Hierarchy Manager - Product Hierarchy Revisions form

Structure Type Enter the type of organizational structure that applies to the catalog.

Description Enter a brief description for the catalog.

Sequence Number Enter the catalog’s sequence number, which determines the order in which valid environments are displayed.

Category Code Enter a category code for the catalog.

User Defined Code Enter a user defined code that applies to the catalog.

Parent Directory Enter the parent catalog name if the catalog is subordinate to or nested within a main catalog.

CHAPTER 6

Managing Customer Information

This chapter provides an overview of how to manage customer information and discusses how to:

- View or modify customer detail information.
- View or modify customer contact and partner information.
- View or modify customer activities and interactions.
- View or modify customer sales information.
- View or modify service information for customers.
- View or modify customer attachments.
- Add a new customer.

Understanding Customer Information

The Customer application includes tabs that enable you to view or modify information related to the selected customer. Accessing some of these tabs takes you to a different application. For example, if you select the Sales tab, you can add a new sales order for the customer through the Sales Order application.

When you launch the Customer application the Search for Customer form appears. On this form you can find and select the customer whose information you want to view or modify. If a selected customer record has subordinate records, you can view the parent and child records by clicking the Parent Child Hierarchy link, which displays the information on a form called Customer Parent Child Relationship.

The Customer application contains these form tabs:

Customer Form Tab Name	Purpose
Customer	View or modify customer detail information such as addresses, phone numbers, financial information, and service information.
Contact and Partner	View or modify information for contacts or partners associated with the customer.
Activities	View or modify activities related to the customer, or add a new activity.
Sales	View or modify sales order information for the customer, or add a new order.

Customer Form Tab Name	Purpose
Service	View or modify service contract information, cases, service work orders, or equipment master records for the customer. You can also add new records.
Attachments	View, modify, or create attachments for the customer.

Some forms have links at the top of the form that enable you to view or modify information related to the main tab. The Customer tab also has additional tabs on the lower portion of the form that enable you to view or modify related customer detail information.

In situations where you are using an application other than the Customer application to perform a task (such as to add a new activity), you should refer to the documentation for that specific application for details. References are provided in situations where you should see another chapter or PeopleBook for more information.

Viewing or Modifying Customer Detail Information

This section provides an overview of how to view existing customer information, and discusses how to:

- View or modify customer detail information.
- View or modify customer address information.
- View or modify customer financial information.
- View or modify customer options.
- View or modify service information for the customer.
- View or modify related links for the customer.

Understanding Viewing or Modifying Customer Information

The customer tab contains these links at the top of the form that lets you view or modify customer detail information:

Customer Tab Link Name	Link Purpose
Detail	View or modify details such as the customer name and number, the search type, status,
Address and Phone	View or modify primary and alternate addresses, telephone and fax numbers, and electronic addresses.
Financial	View or modify credit, tax, G/L distribution, collection, and invoice information for the customer.
Customer Options	View or modify ordering, pricing, and shipping options.
Service Information	View or modify adjustment schedules and reporting codes, and send flash messages.
Related Links	Select from a list of links that are related to customers.

In addition, when the Detail, Financial, and Customer Options links are active, there are additional tabs on the lower portion of the form. These supplemental tabs enable you to view or modify information related to the link selected.

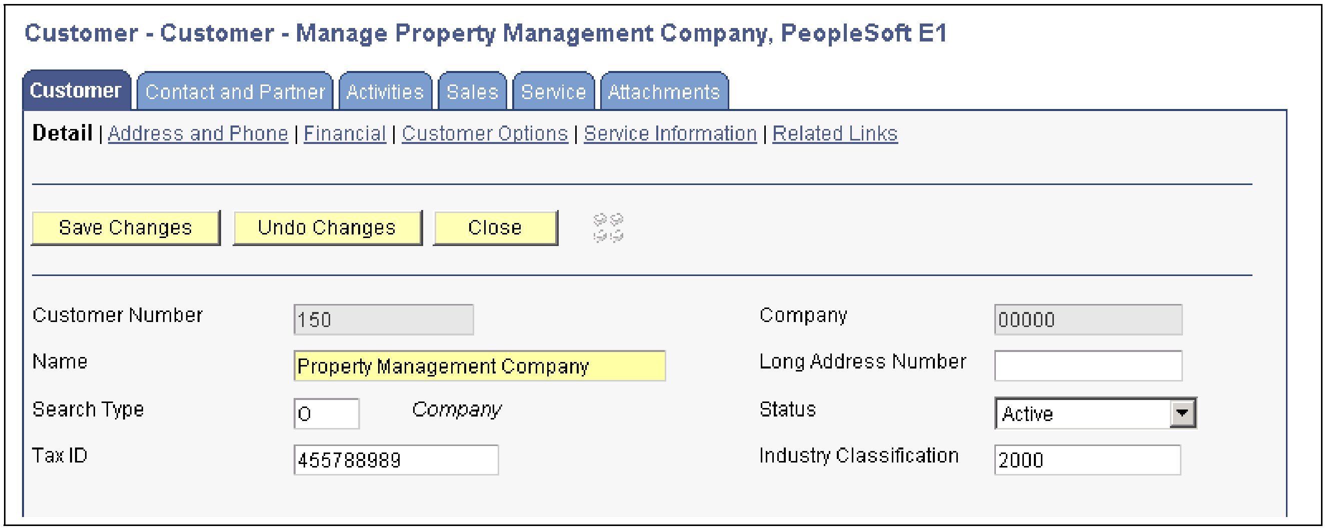
Forms Used to View Customer Information

Form Name	Form ID	Navigation	Usage
Customer - Manage <customer name>	W90CA080A	EnterpriseOne Menus, Customer Relationship Management, CRM Foundation, Daily Processing (JDE004457), Customer. Also EnterpriseOne Menus, Customer Relationship Management, Sales Force Automation, Daily Sales Force Automation Processing (G90CA01), Customer. Also EnterpriseOne Menus, Support, Daily Support Processing (G90CE01), Customer. On Customer - Search For Customers, select a customer record.	View or modify customer information.
Customer - Flash Message Revisions	W00093B	On the Customer - Manage <customer name> form's Customer tab, click the Service Information link and then click Flash Message.	View, modify, or create a flash message.

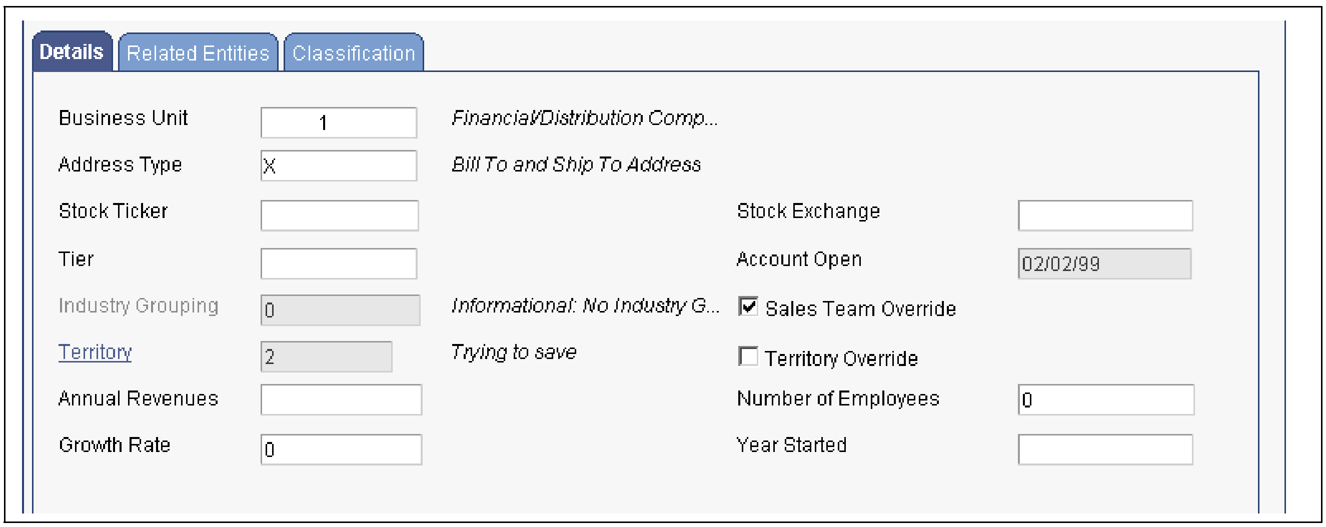
Viewing or Modifying Customer Detail Information

Access the Customer - Manage <customer name> form.

1. View or modify the customer information fields on the upper portion of the form.
2. View or modify information on the Detail tab on the lower portion of the form.
3. Click the Related Entities and Classification tabs to view or modify additional customer information.
4. When you are finished viewing or modifying customer detail information, save or undo any changes.



Customer - Manage <customer name> form (top)



Customer - Manage <customer name> form (bottom)

Customer

Select the Customer tab.

Name Enter up to 40 alphabetical characters for the customer name. You can enter dashes, commas, and other special characters, but the system does not use them when searching from this field for a name.

Search Type Enter the user-defined code (system 01, type ST) that indicates the kind of address book record to search for. For example:

E: Employees

X: Ex-employees

V: Suppliers

C: Customers

P: Prospects

M: Mail distribution lists

	TAX: Tax authorities
Status	Enter the current customer status for CRM purposes. Values are: *Off or null:* Active *On or 1:* Inactive
Industry Classification	Enter the code that classifies goods and services. This code can follow the format of any of these classification systems: • Standard Industrial Classification (SIC) or North American Industry Classification System (NAICS). A numerical system used in the United States to classify goods and services. This code is four digits long for SIC, or six digits long for NAICS. • Harmonized System (HS). The international method of classifying goods. More than fifty countries use this code. An HS code can be up to 10 digits long. • Standard Industrial Trade Classification (SITC). A numerical code system developed by the United Nations to classify goods used in international trade. International organizations use this code. An SITC code can be up to six digits long.

Details

Click the Details tab on the Customer - Manage <customer name> form's Customer tab.

Business Unit	Enter the alphanumeric code that identifies the separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.
Address Type	Enter the code that tells the system to use this address as a Sold To address, a Ship To address, or both. Codes are: *X:* Use as a bill to and ship to address *S:* Use as a ship to address only *B:* Use as a bill to address only
Stock Ticker	Enter the company's stock market ticker symbol.
Stock Exchange	Enter the exchange under which the company's stock is listed.
Tier	Enter the tier associated with the customer. The tier is a subjective ranking of customer value.
Sales Team Override	Select this option to control whether the CRM system automatically assigns a sales team to the customer. When this option is selected, the automatic sales team assignment process is overridden. When this option is not selected, the CRM system automatically assigns a sales team to the customer.
Territory Override	Select this option to control whether CRM system automatically assigns a sales territory ID to this customer. When this option is selected, the automatic sales territory ID assignment feature is overridden. When this option is not selected, the CRM system automatically assigns a sales territory ID to the customer.
Annual Revenues	Enter the company's revenue range.

Number of Employees Enter the number of people employed by the customer.

Growth Rate Enter the customer’s growth rate.

Year Started Enter the year in which the company became a customer.

Related Entities

Click the Related Entities tab on the Customer - Manage <customer name> form’s Customer tab.

1st through 5th Address Number Enter the customer’s alternate or secondary address number as entered in the Address Book system. You can use this field for any secondary business address that relates to the primary address, such as for a salesperson, law firm, accountant, or securities agent.

Factor/Special Payee Enter a number in the address book that identifies a special payment address for accounts payable. If entered, this number must exist in the Address Book Master table (F0101) for validation purposes.

Classification

Click the Classification tab on the Customer - Manage <customer name> form’s Customer tab.

Category Code 01 - 30 Enter one of thirty reporting codes that you can assign to an address in the Address Book system. Use these codes to identify addresses for reports, mailings, and so on. Examples include:

01: Location or branch

02: Salesperson

03: New tenant

04: Credit officer

Viewing or Modifying Customer Address Information

Access the Customer - Manage <customer name> form, and then click the Address and Phone link.

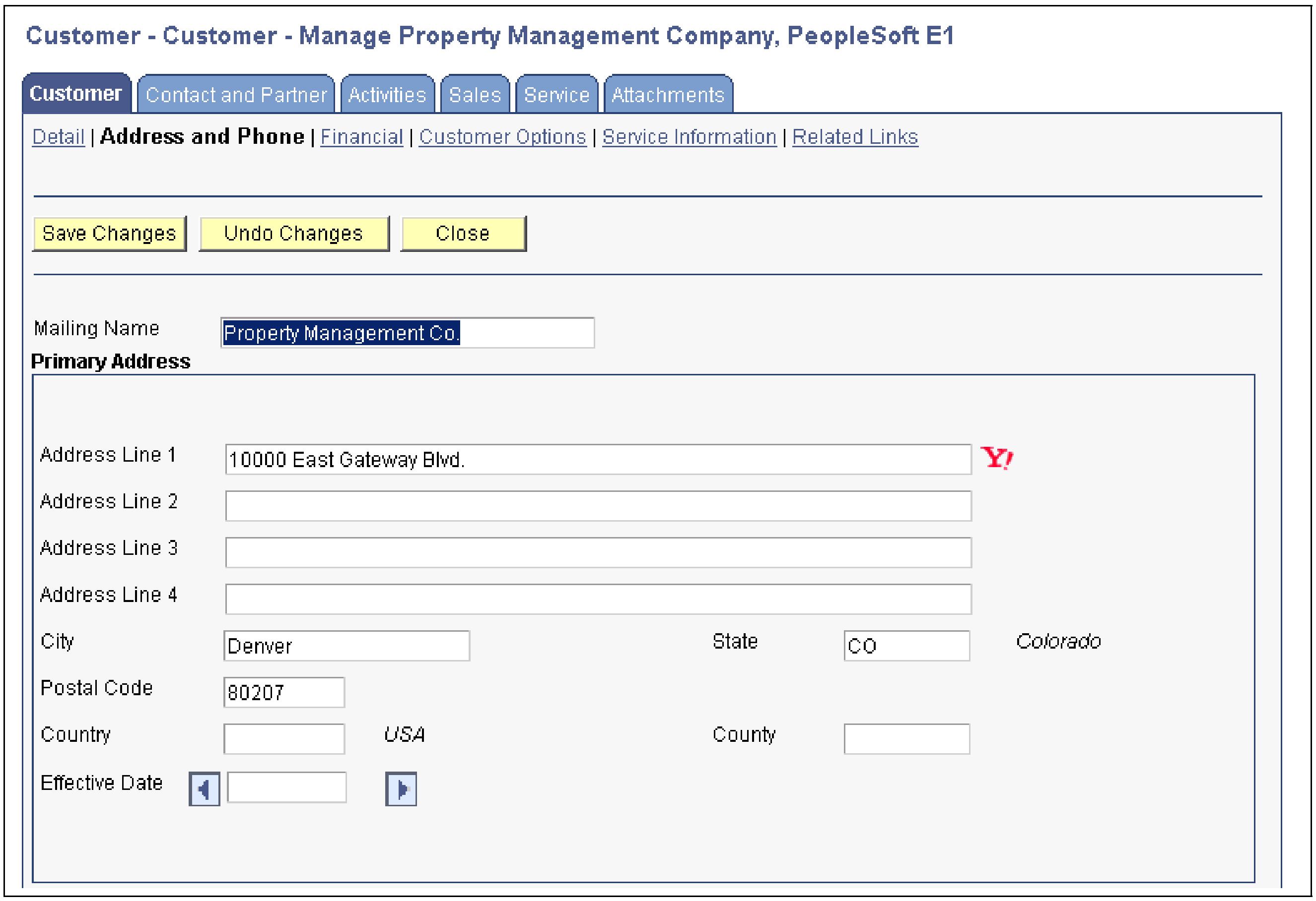
1. View or modify the customer’s primary address information in the upper part of the form.
2. In the Alternate Addresses grid, perform any of these actions:
   - View alternate addresses for the customer.
   - Delete an alternate address by selecting the address in the grid and then clicking Delete.
   - Change the customer’s primary address to one of the alternate addresses displayed by selecting the address in the grid and then clicking Set Main Address.

     If you set an alternate address as the primary address and then want to undo the change, click Clear Main Address.
   - Add a new alternate address by selecting a blank row in the grid and entering address information.
3. In the Phones and Fax grid, perform any of these actions:
   - View phone and fax information for the customer.
   - Delete a phone or fax number by selecting the entry in the grid and then clicking Delete.

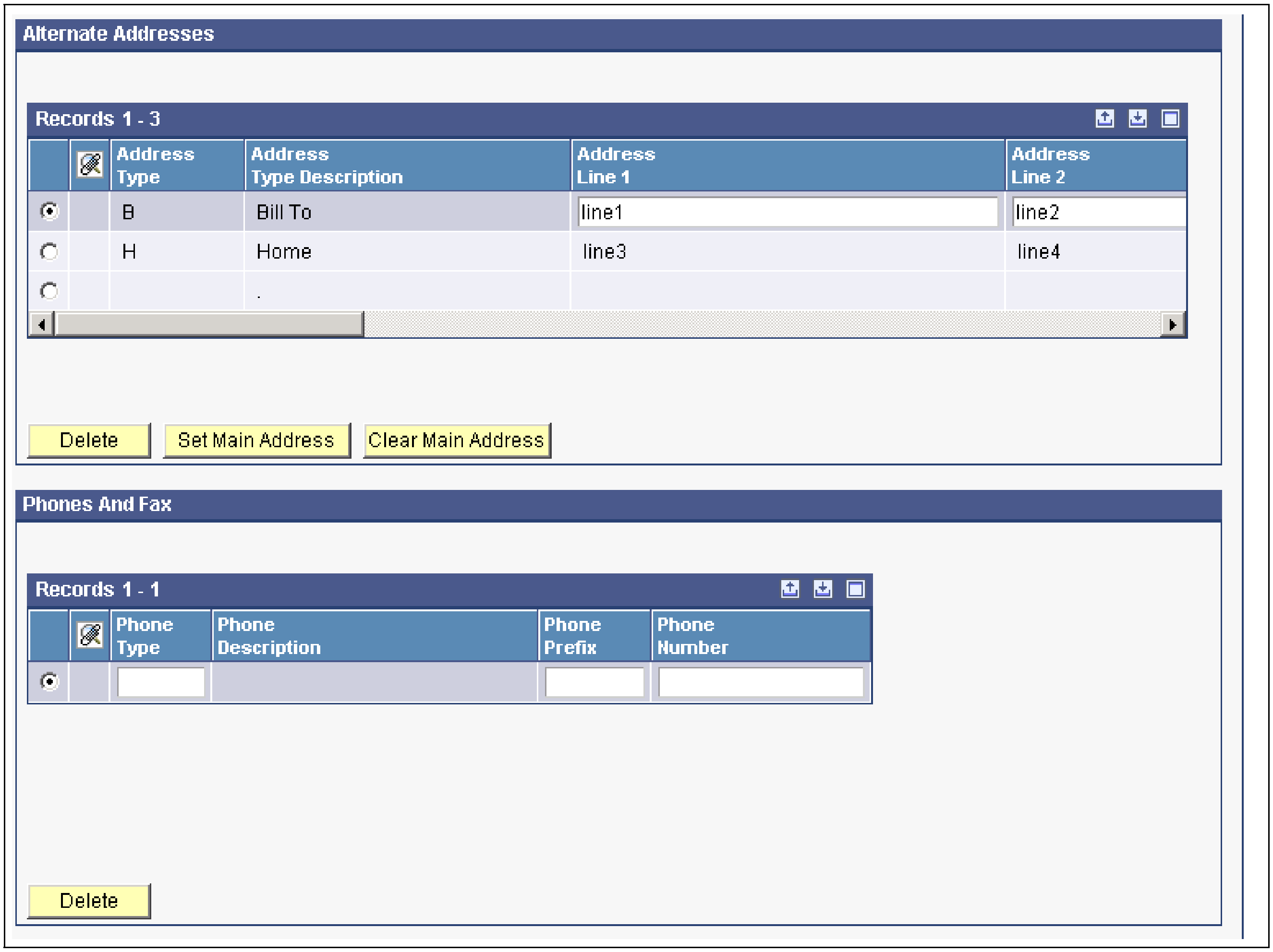
- Add a new phone or fax number by selecting a blank row in the grid and entering phone or fax information.

4. In the Electronic Addresses grid, perform any of these actions:
   - View electronic addresses for the customer.
   - Delete an electronic address by selecting the address in the grid and then clicking Delete.
   - Add a new electronic address by selecting a blank row in the grid and entering address information.
   - Send a previously created email message by clicking Send Email.

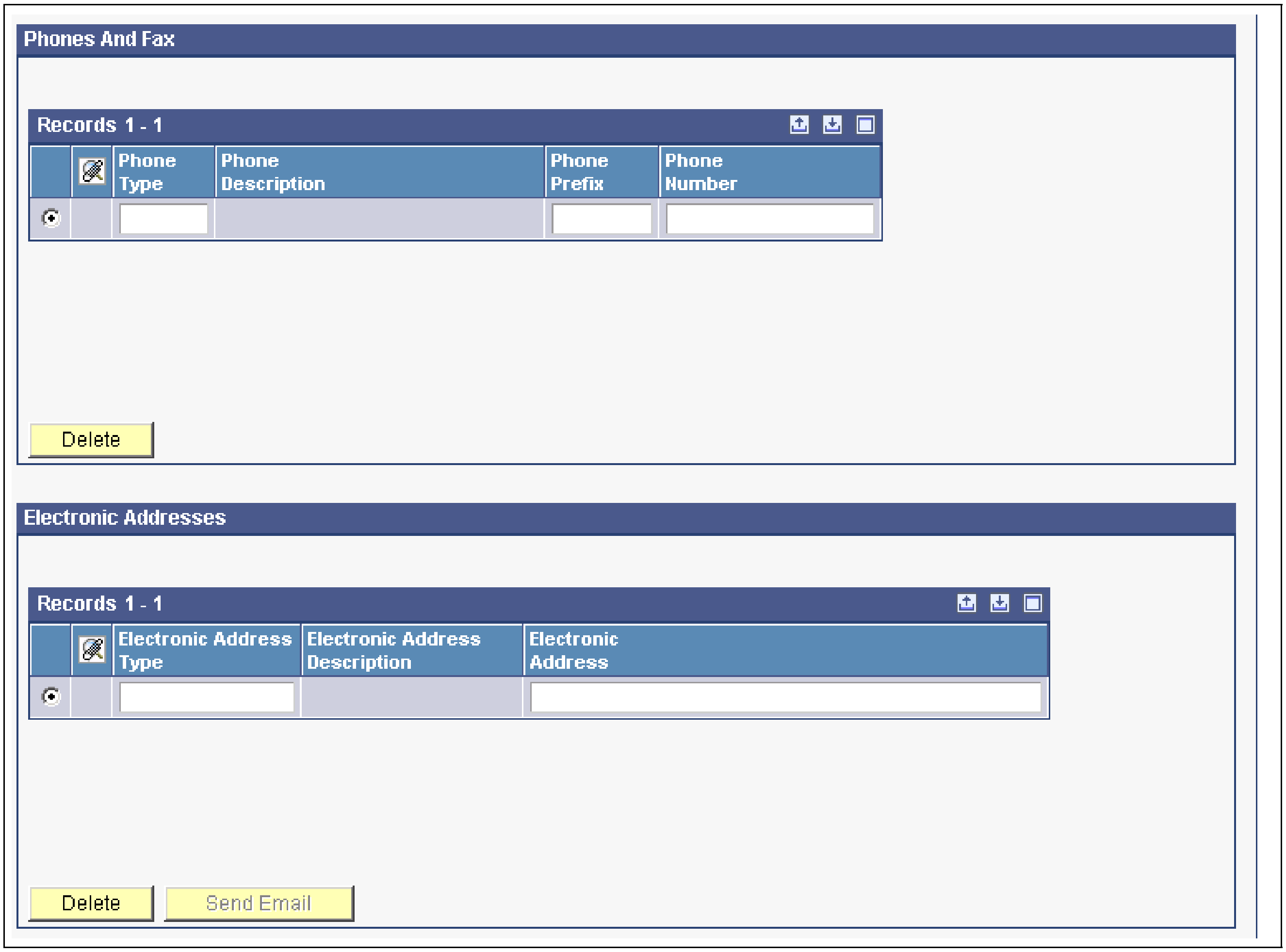
     This field becomes active when the selected row contains an electronic address for which an email message was created.
5. When you are finished viewing or modifying address and phone information, save or undo any changes.



Customer - Manage <customer name> form: Customer tab: Address and Phone link



Customer Address and Phone form (1 of 2)



Customer Address and Phone form (2 of 2)

Customer

Select the Customer tab and then click the Address and Phone link.

Mailing Name Enter the name of the company or person to whom billing or correspondence is addressed.

Address Line 1-4 Enter the customer's mailing address. The U.S. Internal Revenue Service (IRS) restricts the size of the address that prints on an employee's year-end tax return. To comply with IRS regulations, the system has these restrictions:

- On W-2 returns, the system prints only the last three non-blank address lines, plus the city, state, and postal code.
- On 1099 returns, the system prints only the last non-blank address line, plus the city, state, and postal code.
- On other U.S. federal magnetic media, the system prints only the last non-blank address line, plus the city, state, and postal code.

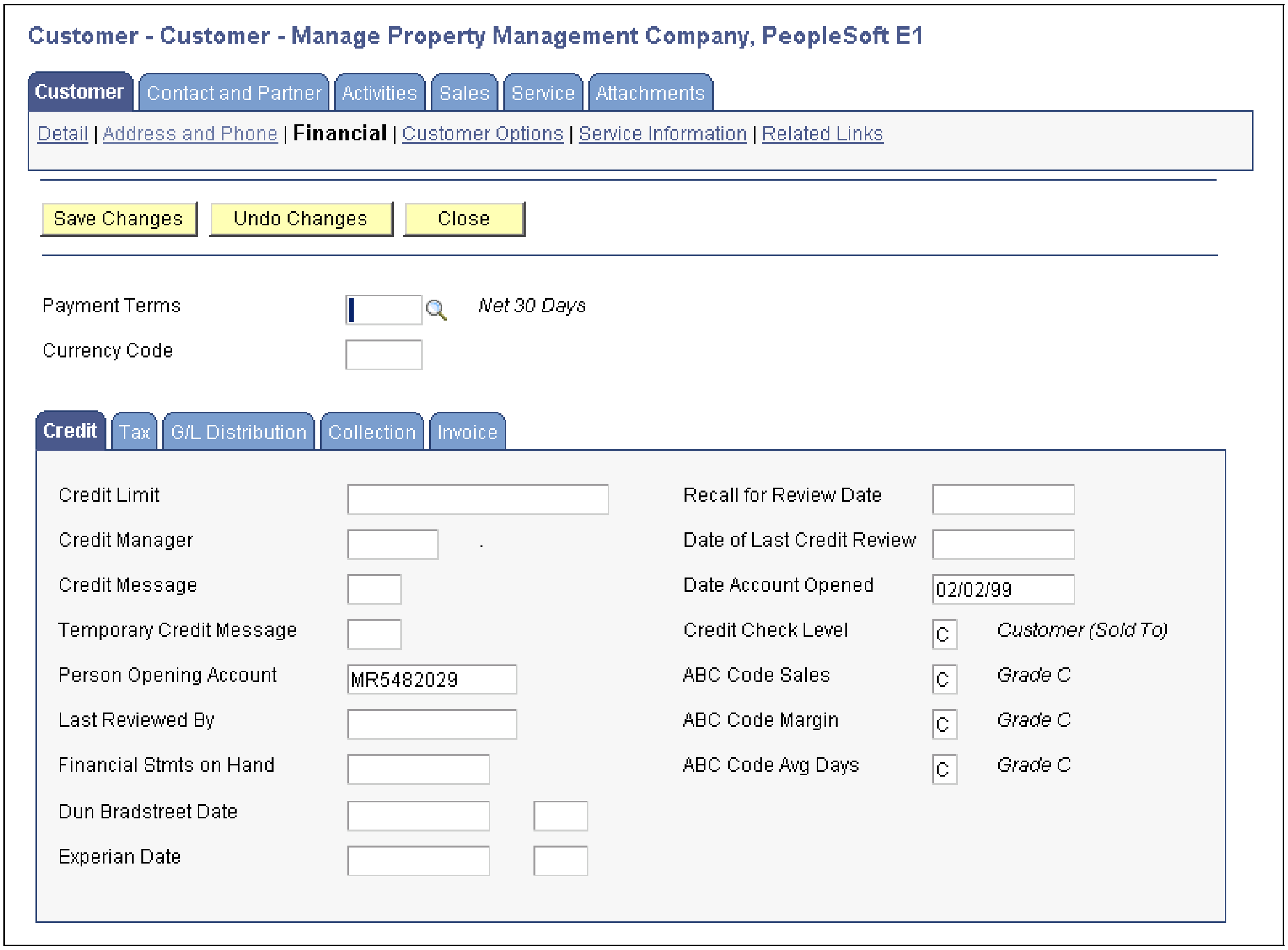
Effective Date and Begin Date Enter the date on which the address becomes active. The meaning of this field differs, depending on the program.

Address Type	Enter the user-defined code (system 01, type AT) that identifies the type of address, such as a home address or an office address.
Phone Type	Enter the user-defined code (system 01, type PH) that indicates either the location or use of a telephone number. Values include: Blank: Business telephone number *FAX:* Fax telephone number *HOM:* Home telephone number
Phone Prefix	Enter the telephone number's prefix or first segment. In the United States, the prefix is the three-digit area code.
Phone Number	Enter the customer's phone number without the prefix or special characters, such as hyphens or periods. You can use any applicable telephone number format for a country.
Electronic Address Type	Enter the user-defined code (system 01, type ET) that describes the type of electronic address. Values are: *E:* Email address such as name@domain *I:* Internet address URL (Uniform Resource Locator) *W:* Internal address (Work Center)
Electronic Address	Enter the customer's email address or URL. For Electronic Address Type W - Internal email (Work Center), the Electronic Address field must be blank.

Viewing or Modifying Customer Financial Information

Access the Customer - Manage <customer name> form, and then click the Financial link.

1. View or modify the payment terms or currency code.
2. As needed, view or modify information on the Credit, Tax, G/L Distribution, Collection, and Invoice tabs.
3. When you are finished viewing or modifying customer financial information, save or undo any changes.



Customer - Manage <customer name> form: Customer tab: Financial link

Customer

Select the Customer tab and then click the Financial link.

Payment Terms

Enter the code that indicates the default payment terms for the customer. Payment terms determine the due date, discount amount, and discount due date that the system assigns when you create an invoice. Use a blank code for the payment terms that you use most frequently. Examples of payment terms include:

Blank: Net 15

1: 1/10 net 30

2: 2/10 net 30

D: Due upon receipt

N: Net 30

P: Prox 25th

Currency Code

Enter the code that identifies the currency for a transaction.

Credit

After clicking the Financial link on the on the Customer - Manage <customer name> form's Customer tab, click the Credit tab.

Credit Limit

Enter the total amount that you allow the customer to spend on purchases before the system sends a workflow message. This value is used throughout the credit management programs. The system maintains the credit limit at the customer (child) level, not the parent level. The system sends workflow messages for each customer who is over their credit limit. When you set up or change the credit limit, the system sends a workflow message to the credit manager that the change is pending approval. The change to the credit limit is not reflected in the customer record until it is approved by the credit manager.

Recall For Review Date

Enter the review date for the customer's credit information.

Credit Manager

Enter the name of the credit manager responsible for approving changes to the credit limit. You must set up the credit manager in the address book, and then create an entry in the user-defined code table (system 01, type CR). When you set up the user-defined code value, you must also enter the credit manager's address book number in the Description 02 field.

Date of Last Credit Review

Enter the date on which the credit manager last examined this customer's payment record and assigned a credit status to the account.

Date Account Opened

Enter the date on which the customer record was created.

Temporary Credit Message

Enter the user-defined code that identifies a temporary credit status. Generally, you assign the code when an account becomes past due. The system automatically updates the temporary credit message based on the notification instructions that you set up for the policy that you assign to the customer. The system can automatically reset the temporary credit message back to the credit message if you activate the option in the policy. You can also manually enter and update the temporary credit message on the customer record. If this field is blank, the system assigns the value of the Credit Message field when you run Credit Analysis Refresh (R03B525). The system displays the temporary credit message on the transaction entry forms in the Accounts Receivable and Sales Order Management systems.

Credit Check Level

Enter the code that controls the way the system conducts credit checking. Codes are:

P: Credit check based on the customer's parent number

C: Credit check against the customer number only

S: Credit check against the customer sold to

L: Credit check bases on the line of business

If you use method P, the system compares the open accounts receivable and open sales orders for the sum of the children and the parent against the credit limit for the parent number. Use this when a customer with multiple offices or branches-each of which order from you-asks that all credit checking be reflected in a single account. Even though credit checking can be conducted at the parent or customer number level, all accounts receivable are posted to the customer number (SDAN8) during Sales Update (P42800).

Person Opening Account View the system-provided user ID of the person who created the customer record.

Last Reviewed By View the system-provided user ID of the person who completed the last credit review. The system provides the user ID of the person who enters or revises the credit limit.

Financial Statements on Hand View the date that financial statements were received to evaluate a company's credit worthiness.

Dun Bradstreet Date View the date on which Dun & Bradstreet ratings were available.

Experian Date View the date on which the Experian ratings were available.

Tax

After clicking the Financial link on the on the Customer - Manage <customer name> form's Customer tab, click the Tax tab.

Tax Expl Code Enter the hard-coded user-defined code (system 00, type EX) that controls the algorithm the system uses to calculate tax and G/L distribution amounts. The system uses the tax explanation code in conjunction with the tax rate area and tax rules to determine how the tax is calculated. Each transaction pay item can be defined with a different tax explanation code.

Tax Rate/Area Enter the code that identifies a tax or geographic area that has common tax rates and tax authorities. The system validates the code you enter against the Tax Areas table (F4008). The system uses the tax rate area in conjunction with the tax explanation code and tax rules to calculate tax and G/L distribution amounts when you create an invoice or voucher.

Tax Exempt Certificate Enter the number that tax authorities issue to tax-exempt individuals and companies to identify their tax-exempt status.

G/L Distribution

After clicking the Financial link on the on the Customer - Manage <customer name> form's Customer tab, click the Collection tab.

G/L Offset Enter the code that determines the A/R trade account that the system uses as the offset when you post invoices. The system concatenates the value that you enter to the AAI item RC to locate the trade account. For example, if you enter TRAD, the system searches for the AAI item RCTRAD to locate the account to use for the offset. The value in this field can be alphanumeric or can match the object code of the G/L account number. If you leave this field blank, the system uses the account that is set up for RC to locate the account number. The value in this field can also be used to locate the offset for unapplied receipts if you specify its use in the processing options for Standard Receipts Entry or the draft entry programs. Otherwise, the system uses the account that is set up for RCUC. You can override the value of this field when you enter the transaction. Do not use class code 9999; it is reserved for the post program and indicates that offsets should not be created.

A/R Model JE Document Type Enter the code that identifies the type of A/R model journal entry to use for a particular customer.

Account Number

Enter a value that identifies an account in the general ledger. Use one of these formats to enter account numbers:

- Standard account number (business unit.object.subsidiary or flex format).
- Third G/L number (maximum of 25 digits).
- Account ID number (eight digits).
- Speed code, which is a two-character code that you concatenate to the AAI item SP.

  You can then enter the code instead of an account number. The first character of the account number indicates its format. You define the account format in the General Accounting constants.

Collection

After clicking the Financial link on the on the Customer - Manage <customer name> form's Customer tab, click the Collection tab.

Collection Manager

Enter the name of the collection manager who is responsible for managing this customer's account. You must set up the collection manager in the address book, and then create an entry in the user-defined code table (system 01, type CM). When you set up the user-defined code value, you must also enter the collection manager's address book number in the Description 02 field. You enter the user-defined code that represents the collection manager in this field.

Deduction Manager

Enter the user-defined name or number that identifies an address book record. You can use this field to enter and locate information. If you enter a value other than the address book number (AN8), such as the long address or tax ID, you must precede it with the special character that is defined in the Address Book constants.

Send Statement To

Enter the code that identifies the billing address that prints on statements. Values are:

C: Customer (AN8)

P: Parent (PA8)

R: Payor (PYR)

1: First address number (AN81)

2: Second address number (AN82)

3: Third address number (AN83)

4: Fourth address number (AN84)

5: Factor/Special Payee (AN85)

6: Fifth address number (AN86)

Statement Cycle

Enter the code that enables you to group customers together for statement printing. For example, you can print statements for all customers that have a statement cycle of A on the 1st of the month, B on the 2nd day of the month, and so on. If you leave this field blank, the system assigns the first letter of the customer's alpha name.

Collection Report

Select this option to specifies whether the customer's overdue invoices are eligible to appear on the collection report that you send to an external agency. When this option is selected, the customer is eligible for external collections. (To update invoices for collection, you must run the program Update A/R from Address Book (R03B802) after you select this option.) When this option is not selected, the customer is not eligible for external collections.

Delinquency Fees

Select this option to specify whether to process delinquency fees for the customer. When this option is selected, delinquency fees are processed.

Print Statement

Select this option to specify whether to print statements for the customer or company. When the option is selected, statements are printed.

Delinquency Notice

Select this option to specify whether to print delinquency notices for the customer or company based on the notification instructions that are set up for the policy that you assign to the customer. When this option is selected, delinquency notices are printed.

Invoice

After clicking the Financial link on the on the Customer - Manage <customer name> form's Customer tab, click the Invoice tab.

Payment Instrument

Enter the user-defined code (system 00, type PY) that specifies how payments are made by the customer. For example:

C: Check

D: Draft

T: Electronic funds transfer

Alternate Payor

Enter the person or company (other than the customer) that the system assigns to the Payor field (PYR) on Customer Ledger records (F03B11) that you enter for the customer. If you leave this field blank, the system assigns the customer number as the payor. If you change the value of this field after invoices have been entered for the customer, you must run Update A/R from Address Book (R03B802) to update the value on the invoice records. The system does not use this value as a default for the Payor field (ALKY) in the receipt or draft entry programs, but you can select invoice records to pay based on the value of Payor.

Send Invoice To

Enter the code that identifies the billing name and address to print on the invoice. Codes are:

C: Customer (AN8)

N: Do not print. The Real Estate Management system (15) ignores this value and uses the value of the Print Invoice field (INVP) from the billing record or lease.

P: Parent (PA8)

R: Payor (PYR)

1: First address number (AN81)

2: Second address number (AN82)

3: Third address number (AN83)

4: Fourth address number (AN84)

5: Factor Special/Payee (AN85)

6: Fifth address number (AN86)

With the exception of Payor (which you set up in the customer record in the Alternate Payee field (AYPR),) all of the preceding codes correspond to related address information that you set up in the address book record. Also, if you have a Who's Who entry that is set up with type code B (for billing), the system overrides the billing name with the entry from the Who's Who record.

Auto Receipts Execution List
Enter the name assigned to a list of algorithms that define the order in which the programs should be run.

A/B Amount Codes
Specify the currency in which amounts are stored in the address book. For example, the credit limit, invoiced this year, invoiced prior year, and so on. The currency you specify is used to record and store transaction history.

Related Address Number
Enter the related address number in situations where the customer ships to a variety of locations across the country, but wants to send all invoices to a single address.

Invoice Copies
Specify the number of invoice copies you want to print. The system always prints at least one invoice.

Auto Receipt
Select this option to specify whether the customer or company is eligible to process receipts in the Accounts Receivable system using the automatic receipt processing programs. When this option is selected, receipts can be processed automatically for the customer or company. The option must be activated for both the customer and the company in the Accounts Receivable constants for the system to process automatic receipts.

Hold Invoices
Select this option to prevent anyone from entering invoices manually. When this option is selected, invoices are held and you receive an error message if you attempt to enter invoices using the Speed Invoice Entry (P03B11SI) or Standard Invoice Entry (P03B11) programs. The system ignores this field if invoices are generated from the Sales Order Management system.

Invoice Consolidation
Enter the code that tells the system whether a customer wants consolidated invoices. Codes are:

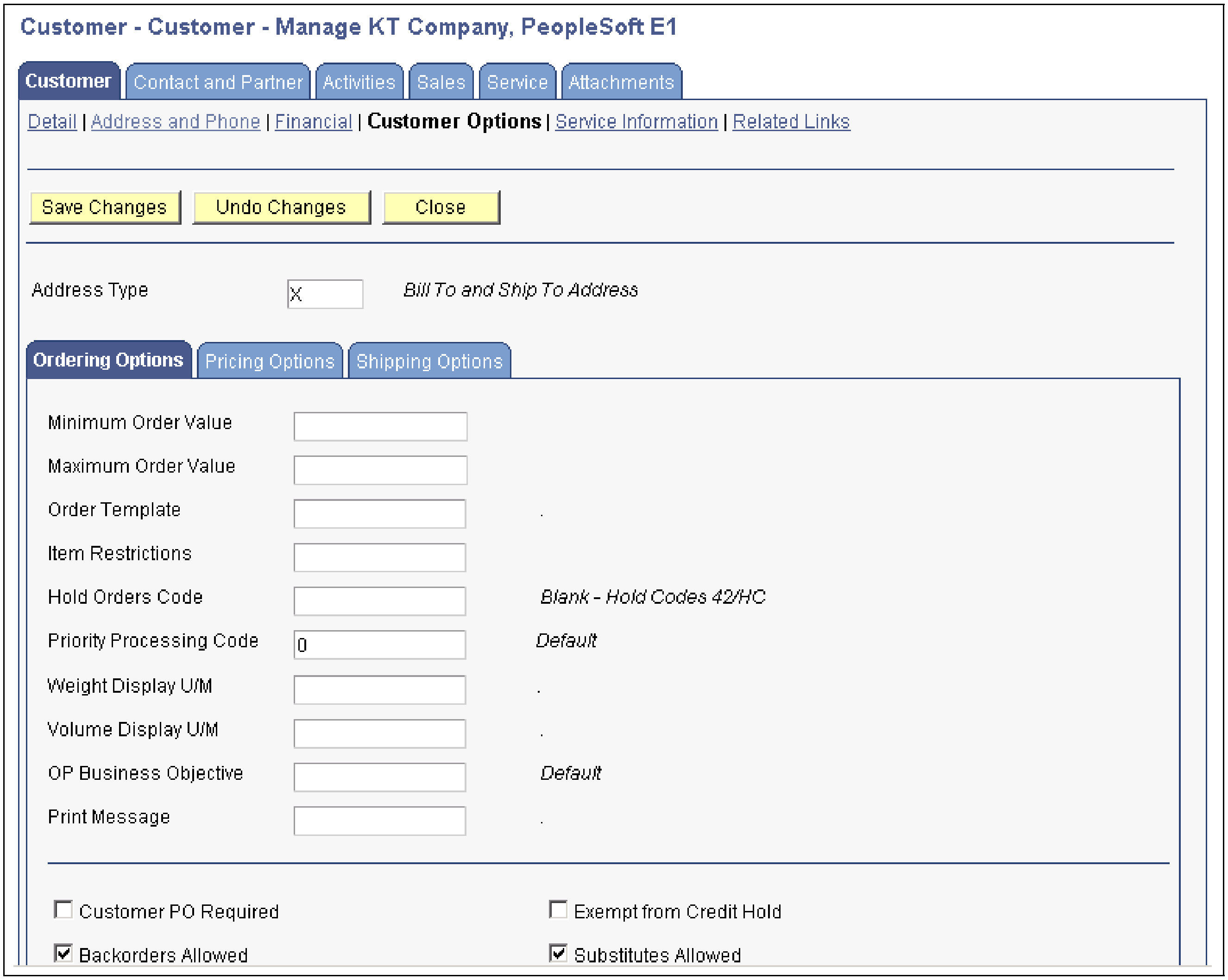
Y: Consolidate invoices. If you specify consolidation, the system generates a single invoice from multiple sales orders.

N: Do not consolidate invoices.

Viewing or Modifying Customer Options

Access the Customer - Manage <customer name> form, and then click the Customer Options link.

1. View or modify the address type.
2. As needed, view or modify information on the Ordering Options, Pricing Options, and Shipping Options tabs.
3. When you are finished viewing or modifying customer options, save or undo any changes.



Customer - Manage <customer name> form: Customer tab: Customer Options link

Customer

Select the Customer tab and then click the Customer Options link.

Address Type Enter the code that tells the system to use this address as a Sold To address, a Ship To address, or both. Codes are:

X: Use as a bill to and a ship to address

S: Use as a ship to address only

B: Use as a bill to address only

Ordering Options

After clicking the Customer Options link on the on the Customer - Manage <customer name> form's Customer tab, click the Ordering Options tab.

Minimum Order Value Specify a value for the order, below which the order is placed on hold. If you try to enter an order whose total is less than the minimum order value, the system displays an error message.

Maximum Order Value Specify a value for the order, above which the order is placed on hold. If you try to enter an order whose total is more than the maximum order value, the system displays an error message.

Order Template View a list of items that you frequently order. The items are typically grouped based on the product type, such as fuels, lubricants, and packaged goods.

Item Restrictions Enter the code that indicates whether restrictions have been placed on the sale of items to this customer. Values are:

Blank: No restrictions.

I: A customer can be sold only those items set up on the Item Restrictions screen.

E: A customer cannot be sold the items set up on the Item Restrictions screen.

Hold Orders Code Enter the user-defined code (system 42, type HC) that identifies why an order is on hold.

Priority Processing Code View the code that tells the system to handle this customer's orders on a priority basis. Use this value to set up print pick slips so you can choose to print them on a priority basis. This code is assigned from the Customer Billing Instructions. In addition, the backorder print report and automatic batch release program can be sequenced by this code to release those orders with the highest priority first.

Weight Display U/M Enter the user-defined code (system 00, type UM) that identifies which unit of measure the system uses for this customer to display the weight of individual order lines and the order as a whole when you use the order summary form.

Volume Display U/M View the user-defined code (system 00, type UM) that identifies the unit of measure the system uses to display volume for this branch/plant. The system inputs a value in this field from Branch/Plant Constants - Page 2 (P410012). You can override this default value.

OP Business Objective View the value that specifies a default business objective to send outbound to order promising before an order has been promised. (A business objective is a grouping of business rules that fulfill a sales order.) For sales order detail lines, this value specifies the business objective that is selected by order promising after an order has been promised.

Print Message View the user-defined code that you assign to each print message. Examples of text used in messages are engineering specifications, hours of operation during holiday periods, and special delivery instructions.

Customer PO Required Specify whether the Customer Purchase Order Number field must be entered for the customer. This field is edited during Sales Order Entry.

Exempt From Credit Hold Enter the code indicating whether the customer is exempt from credit checking in the Sales Order Processing cycle. Codes are:

Y: Sales order entry should not check the customer's credit.

N: This customer is not exempt from credit checking. If credit checking is activated through the Sales Order Entry processing options and the customer goes over the limit, the order is put on hold. (You set up a credit limit for the customer in the address book.)

Backorders Allowed View the option that specifies whether to enable backorders for this item. You can enable backorders by customer using the Customer Billing Instructions program (P03013). When this option is selected, backorders are enabled. When this option is not selected, backorders are not enabled for this item, regardless of the backorders code that is assigned to the customer.

Substitutes Allowed Specify whether the customer will accept substitute items. Enter *N* to disallow or *Y* to enable substitutions. The system interprets a blank value as a *Y*.

COA Print Enter the code that indicates whether the system prints a Certificate of Analysis for the customer. Values are:

Y: Print the Certificate of Analysis.

N: Do not print a Certificate of Analysis for a specific customer when a Certificate of Analysis report is run for a group of customers.

This feature is activated only when the Quality Management System is in use and the Certificate of Analysis is created.

Bypass Audit Logging Select this option to specify whether to bypass the audit logging process for sales order changes.

Pricing Options

After clicking the Customer Options link on the on the Customer - Manage <customer name> form's Customer tab, click the Pricing Options tab.

Pricing Schedule Enter the user-defined code (system 40, type AS) that identifies a price and adjustment schedule. A price and adjustment schedule contains one or more adjustment types for which a customer or an item might be eligible. The system applies the adjustments in the sequence that you specify in the schedule. You link customers to a price and adjustment schedule through Customer Billing Instructions. When you enter a sales order, the system copies the schedule attached to the sold to address into the order header. You can override this schedule at the detail line level.

Customer Price Group Enter the user-defined code (system 40, type PC) that identifies a customer group. You can group customers with similar characteristics, such as comparable pricing.

Trade Discount Enter the percentage amount by which the system reduces the price of each item. This is the only discount applied. You can override the discount if you enter a price. Enter the percentage as a whole number (such as 5 for 5 percent).

Buying Segment Code Enter the value that groups customers with similar buying habits.

Adjustment on Invoice Use this field to control whether the system prints price adjustment details on the customer's sales invoice. This field is active only if you are using the Advanced Price Adjustment module (System Code 4010).

Price Pick List Select this option to indicate whether price information appears on the customer's pick list, purchase order, or sales order. When this option is selected, price information appears.

Shipping Options

After clicking the Customer Options link on the on the Customer - Manage <customer name> form's Customer tab, click the Shipping Options tab.

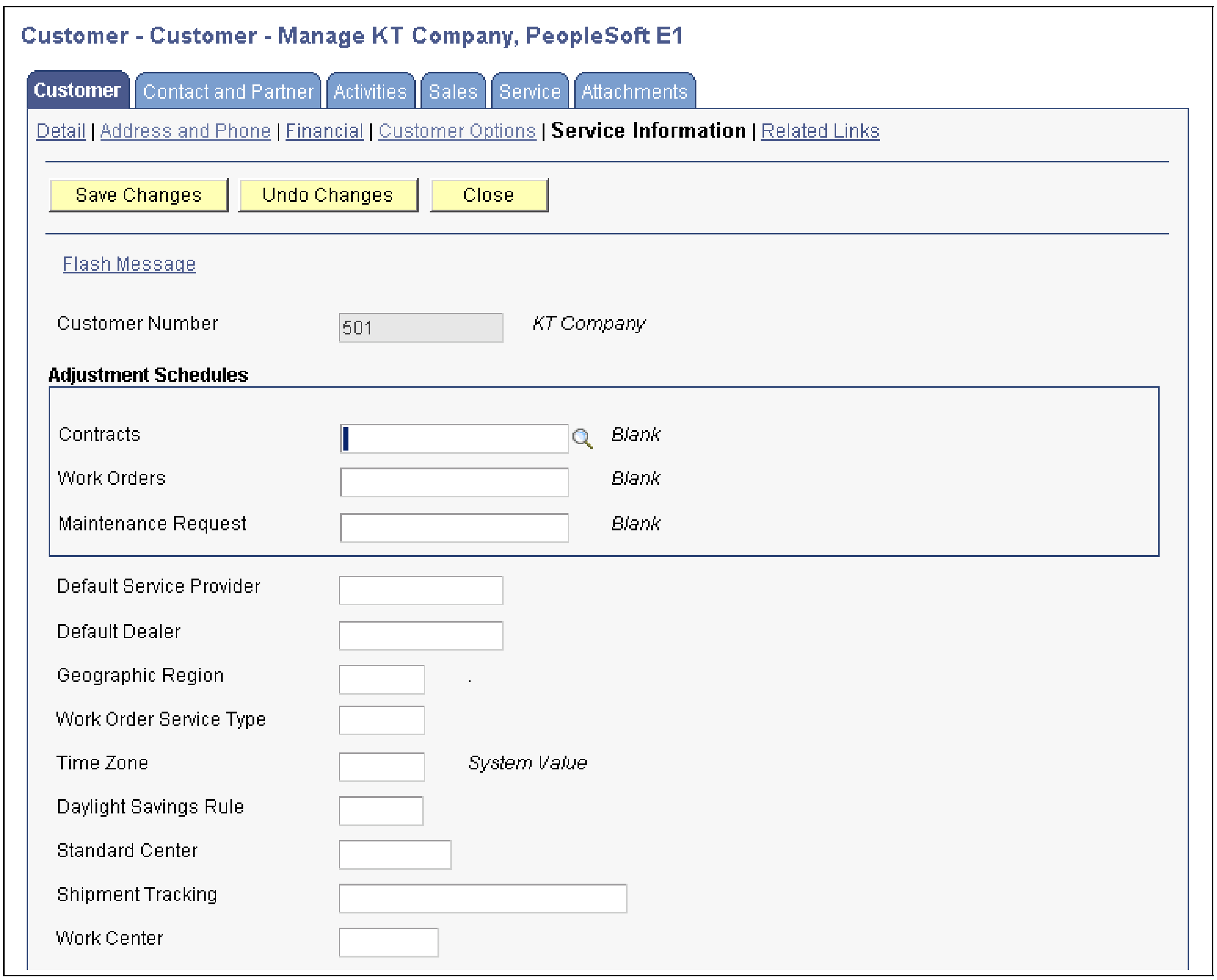
Freight Handling Code	Enter the user-defined code (system 42, type FR) that indicates the method by which supplier shipments are delivered. For example, the supplier could deliver to your dock, or you could pick up the shipment at the supplier's dock. You can also use these codes to indicate who has responsibility for freight charges. For example, you can have a code indicating that the customer legally takes possession of goods as soon as they leave the supplier warehouse and is responsible for transportation charges to the destination.
Zone Number	Enter the user-defined code (system 40, type ZN) that indicates the delivery area in which the customer resides. This field is one of several factors used by freight summary facility to calculate potential freight charges for an order. For picking you can use the zone code with the route and stop codes to group all item that are to be loaded onto a delivery vehicle for a specific route. You set up the default for each of these fields on the Customer Billing Instructions form.
Carrier Number	Enter the address number for the item's preferred carrier. The customer or your organization might prefer a certain carrier due to route or special handling requirements.
Route Code	Enter the user-defined code (system 42, type RT) that represents the delivery route on which the customer resides. This field is one of several factors used by the freight summary facility to calculate potential freight charges for an order. For picking, use the route code with the stop and zone codes to group all of the items that are to be loaded onto a delivery vehicle for a specific route. You set up a default for each of these fields on the Customer Billing Instruction form.
Stop Code	Enter the user-defined code (system 42, type SP) that represents the stop on a delivery route. This field is one of several factors used by the freight summary facility to calculate potential freight charges for an order. For picking, you can use the stop code with the route and zone codes to group all items that are to be loaded onto a delivery vehicle for a specific route. You set up the default for each of these fields on the Customer Billing Instructions form.
Delivery Instructions	Enter specific delivery instructions.
Partial Shipments Allowed	Select this option to indicate whether the customer accepts partial line shipments. When this option is selected, the customer accepts partial line shipments.
Partial Order Shipments Allowed	Select this option to indicate whether the customer requires that the entire order be shipped at one time, or if the customer will accept multiple partial shipments instead. This feature is activated only when adding orders in Sales Order Entry with availability checking On, since Sales Order Entry is the only time that all lines can be grouped together as an order. Availability checking performed at Pick Slips or Shipment Confirmation does not guarantee that all lines are together for the order.
Delivery Note	Select this option to specify whether the system prints delivery notes for this customer on the invoice. When this option is selected, the system prints delivery notes on the invoice.

Apply Freight Select this option to specify whether the system performs freight calculations during processing. When this option is selected, the system performs freight calculations during processing.

Viewing or Modifying Service Information for the Customer

Access the Customer - Manage <customer name> form, and then click the Service Information link.

1. View or modify service information.
2. To view, modify, delete, or create a flash message, click the Flash Message link.
3. On Customer - Flash Message Revisions, do any of the following:
   - Select and view or modify an existing flash message record.
   - Delete a flash message by selecting the message record in the grid and then clicking Delete.
   - Add a new flash message by selecting a blank row in the grid and then entering the message information.
4. Click OK to return to the Customer - Manage <customer name> form.
5. When you are finished viewing or modifying service information, save or undo any changes.



Customer - Manage <customer name> form: Customer tab: Service Information link

Customer

Select the Customer tab and then click the Service Information link.

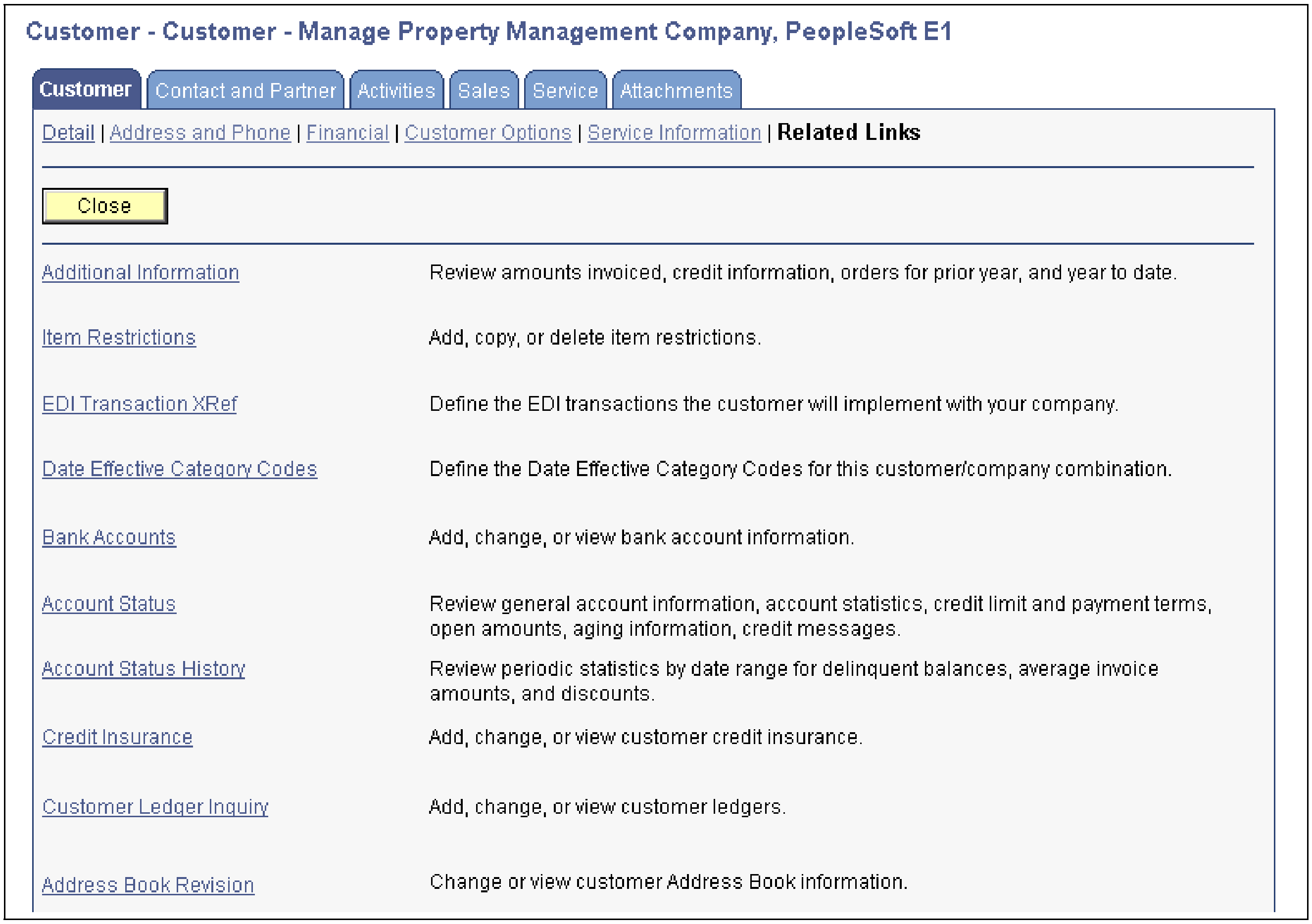
Contracts	Enter the user-defined code (system 40, type AS) that identifies a price and adjustment schedule. A price and adjustment schedule contains one or more adjustment types for which a customer or an item might be eligible. The system applies the adjustments in the sequence that you specify in the schedule. You link customers to a price and adjustment schedule through the customer billing instructions. When you enter a sales order, the system copies the schedule attached to the sold to address into the order header. You can override this schedule at the detail line level.
Work Orders	Enter the user-defined code (system 40, type AS) that identifies a price and adjustment schedule.
Maintenance Requests	Enter the user-defined code (system 40, type AS) that identifies a price and adjustment schedule.
Default Service Provider	Enter the user-defined name or number that identifies the address book record for the service provider you want to use as the default provider.
Default Dealer	Enter the user-defined name or number that identifies the address book record for the dealer you want to use as the default dealer.
Geographic Region	Enter the customer’s geographic region.
Work Order Service Type	Enter the user-defined code (system 00, type TY) that indicates the classification of a work order or engineering change order. You can use work order type as a selection criterion for work order approvals.
Time Zone	Choose the time zone for which you want to view the date and time.
Daylight Savings Rule	Enter the rule name that identifies a daylight savings rule. Use daylight savings rules to adjust time for a geographic and political locale.
Standard Center	Enter the unique four-character code assigned to the carrier.
Shipment Tracking	Enter the name of the business function that provides access to a carrier’s external shipment tracking function.
Work Center	Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant. You can assign a business unit to a document, entity, or person for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business unit to track equipment by responsible department. Business unit security might prevent you from viewing information about business units for which you have no authority.
Responsible Business Unit	Enter the number of the business unit in which the employee generally resides.
Case Category Code 07-10	Enter one or more user-defined category codes used when assigning customer issues.

Viewing or Modifying Related Links For the Customer

Access the Customer - Manage <customer name> form, and then click the Related Links link.

Click one of the displayed links to perform the action described to the right of the link name. This table lists available links and their descriptions:

Link Name	Link Description
Additional Information	Review amounts invoiced, credit information, orders for the prior year, and orders year to date.
Item Restrictions	Add, copy, or delete item restrictions.
EDI Transaction XRef	Define the EDI transactions the customer implements with the company.
Date Effective Category Codes	Define the Date Effective category codes for this customer/company combination.
Bank Accounts	Add, change, or view bank account information.
Account Status	Review periodic statistics by date range for delinquent balances, average invoice amounts, and discounts.
Credit Insurance	Add, change, or view customer credit insurance.
Customer Ledger Inquiry	Add, change, or view customer ledgers.
Address Book Revision	Change or view customer Address Book information.



Customer - Manage <customer name> form: Customer tab: Related Links link

Viewing or Modifying Customer Contact and Partner Information

This section discusses how to:

- View or modify contacts.
- View or modify partners.

Forms Used to View or Modify Contact and Partner Information

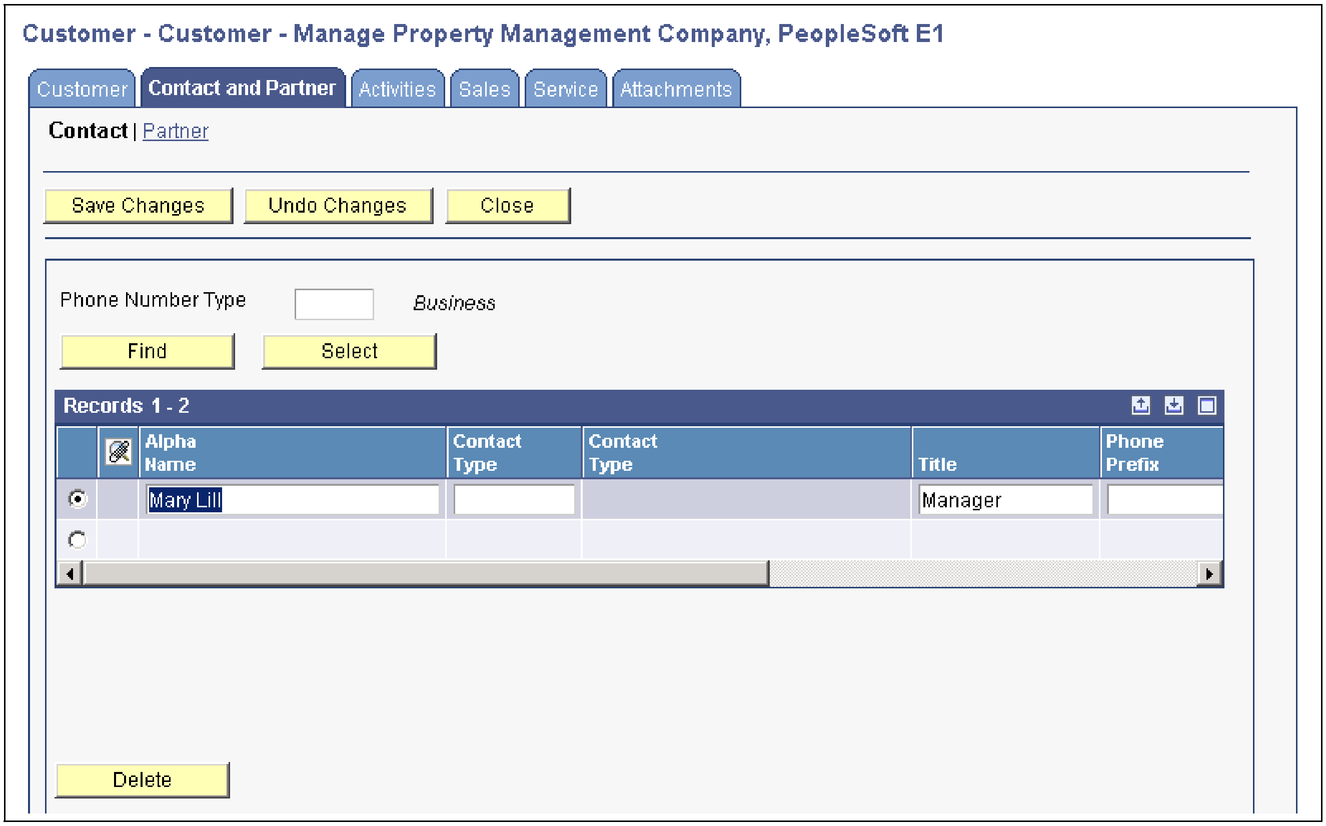
Form Name	Form ID	Navigation	Usage
Customer - Manage <customer name> (Contact)	W90CA08TA	On Customer - Manage <customer name>, click the Contact and Partner tab.	View or modify contact information.
Customer - Manage <customer name> (Contact)	W90CA08RA	Click the Partner link on the Customer - Manage <customer name> form's Contact and Partner tab.	View or remove existing partners and assign new partners.
Contact - Manage <contact name>	W90CA070B	Select a contact in the grid and click Select.	View or modify contact information.
Address Book Revision	W01012A	Click the link for an assigned partner.	View or modify partner information.
Link Partners	W90CA050C	Click the Contact and Partner tab, click Partner, and then click the Assign Partner button.	Assign a partner to the customer.

Viewing or Modifying Contacts

Access the Customer - Manage <customer name> form and then click the Contact and Partner tab.

1. Find and select in the grid the contact whose information you want to view or modify.
2. On Contact - Manage <contact name>, view or modify contact information and then save or undo any changes.

   See Chapter 8, "Managing Contacts," page 125.
3. To delete a contact record, selecting in the grid the contact and then click Delete.
4. To add a new contact, select a blank row in the grid and then enter the contact information.
5. When you are finished viewing or modifying contact information, save or undo any changes.



Customer - Manage <customer name> form: Contact and Partner tab: Contact link

Contact

Select the Contact and Partner tab and then click the Contact link.

Phone Number Type

Enter the user-defined code (system 01, type PH) that indicates either the location or use of a telephone number. Values include:

Blank: Business telephone number

FAX: Fax number

HOM: Home telephone number

Alpha Name

Enter up to 40 alphabetic characters for the contact’s name. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.

Contact Type

Enter the user-defined code (system 01, type CT) that describes the type of contact. For example, you might set up codes to describe a contact as a decision maker, a competitor, and so on.

Title

Enter the professional title of the contact as entered in the Who’s Who table.

Phone Prefix

Enter the first segment or prefix of a telephone number. In the United States, the prefix is the three-digit area code.

Phone Number

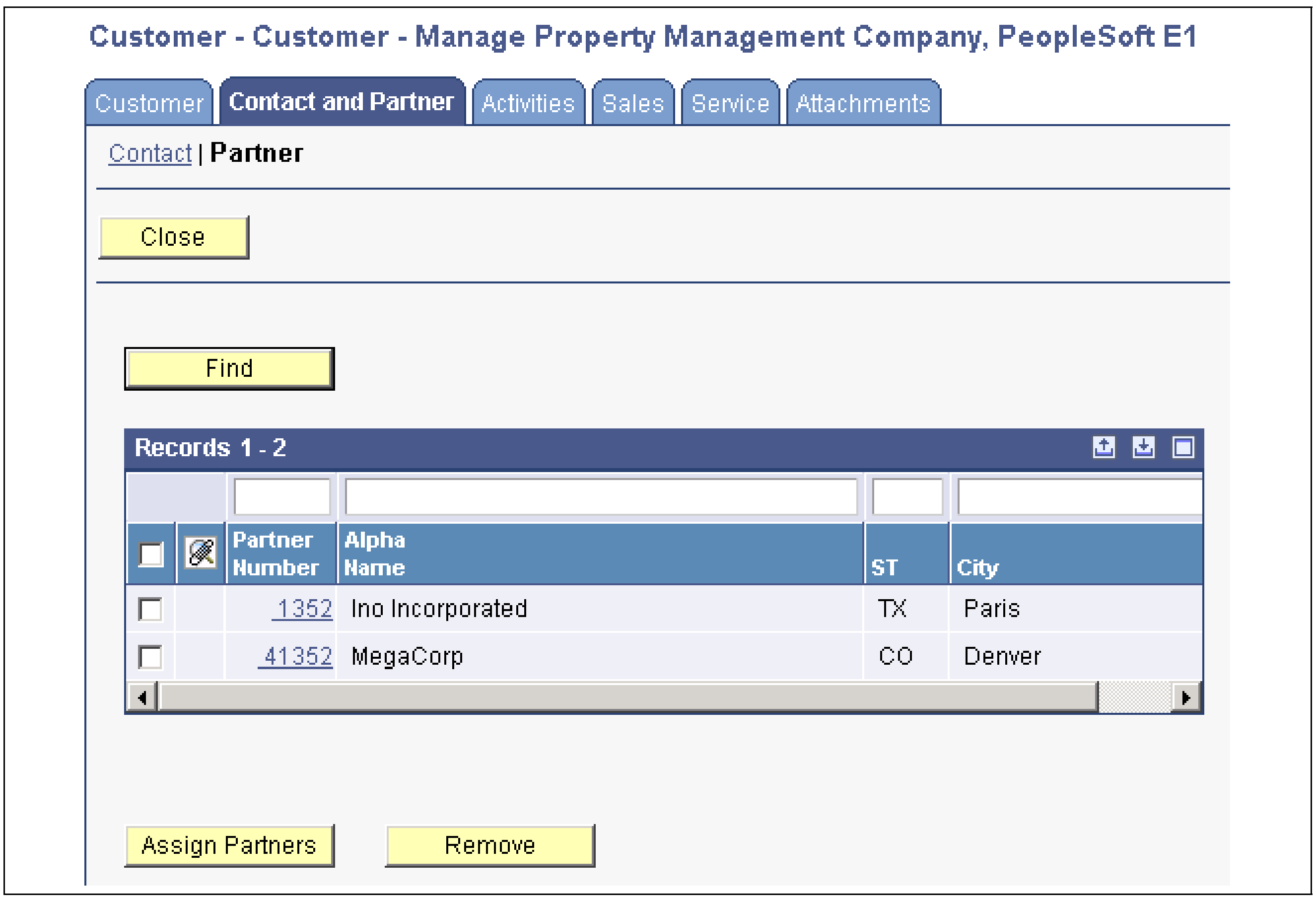
Enter the telephone number without the prefix or special characters, such as hyphens or periods. You can use any applicable telephone number format for a country.

Electronic Address	Enter the customer's email address or Uniform Resource Locator (URL). For Electronic Address Type W - Internal email (Work Center), the Electronic Address field must be blank.
Display Sequence	Enter a number that specifies the order in which a group of records appears on a form.

Viewing or Modifying Partners

Access the Customer - Manage <customer name> form's Contact and Partner tab and then click the Partner link.

1. In the grid, click the link for the partner whose information you want to view or modify.
2. On Address Book Revision, view or modify partner information.
3. To remove a partner, select the partner and then click Remove.
4. To assign a new partner, select a blank row in the grid, and then find and select the partner on the Link Partners form.



Customer - Manage <customer name> form: Contact and Partner tab: Partner Information

Partner

Select the Contact and Partner tab and then click the Partner link.

Partner Number	The address number (F0101) of the partner associated with the lead.

Alpha Name Enter up to 40 alphabetic characters for the contact's name. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.

Viewing or Modifying Customer Activities and Interactions

This section discusses how to:

- View or modify customer activities.
- Add a new activity for the customer.
- Link the activity to an action plan.
- View or modify customer interactions.

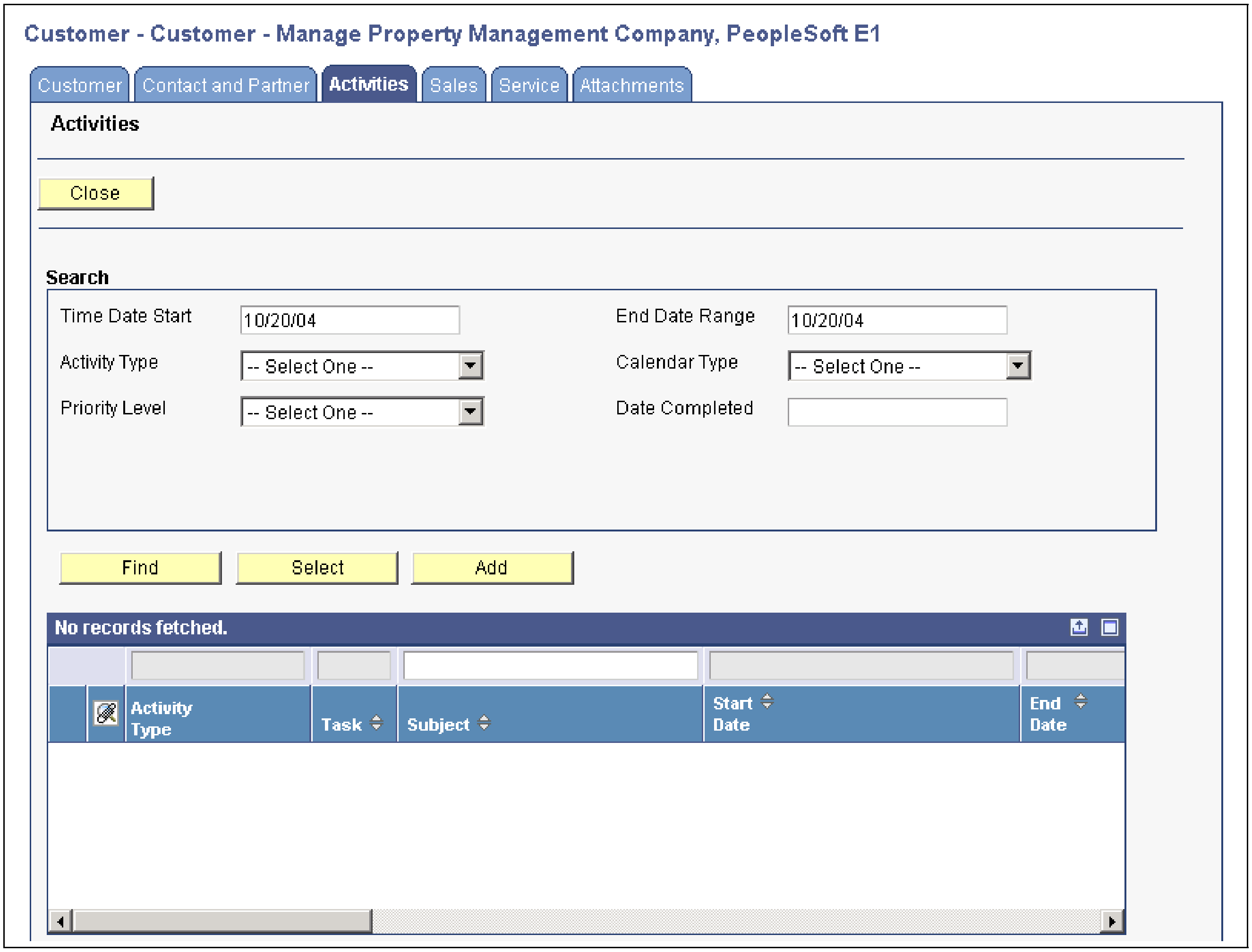
Forms Used to View or Modify Activities and Interactions

Form Name	Form ID	Navigation	Usage
Customer - Manage <customer name> (Activities)	W90CA08BA	On the Customer - Manage <customer name> form, click the Activities tab.	View or modify activities for the customer.
Activity - Edit	W01301B	On the Customer - Manage <customer name> form's Activities tab, click an activity in the grid under the Activity Type column.	View or modify activity information.
Add Activity	W01301B	On the Customer-Manage <customer name> form's Activities tab, click Add	Add a new activity for the customer.

Viewing or Modifying Customer Activities

Access the Customer - Manage <customer name> form (Activities tab).

1. If necessary, use the fields in the Search area of the form to limit search results. At a minimum you may want to specify the activity type before searching.
2. When you locate the activity record whose information you want to view or modify, select the record and click Select. (Alternatively, you can click the record's link under the Activity Type column heading.)
3. On Activity - Edit, view or modify the activity. At this point you are in the Activities application.
4. Click Save and Close or Cancel to return to the Customer - Manage <customer name> form.



Customer - Manage <customer name> form: Activities tab

Activities Tab

Time Date Start Enter the beginning date for the date range within which the activity occurs.

End Date Range Enter the ending date for the date range within which the activity occurs.

Activity Type Enter the user-defined code that defines the type of activity.

Calendar Type Enter the user-defined code that defines the type of calendar, such as personal calendar, customer calendar, CRM calendar, and so on.

Priority Level Enter the user-defined code that indicates the activity's level of importance or commitment. Values are:

1: High

2: Medium

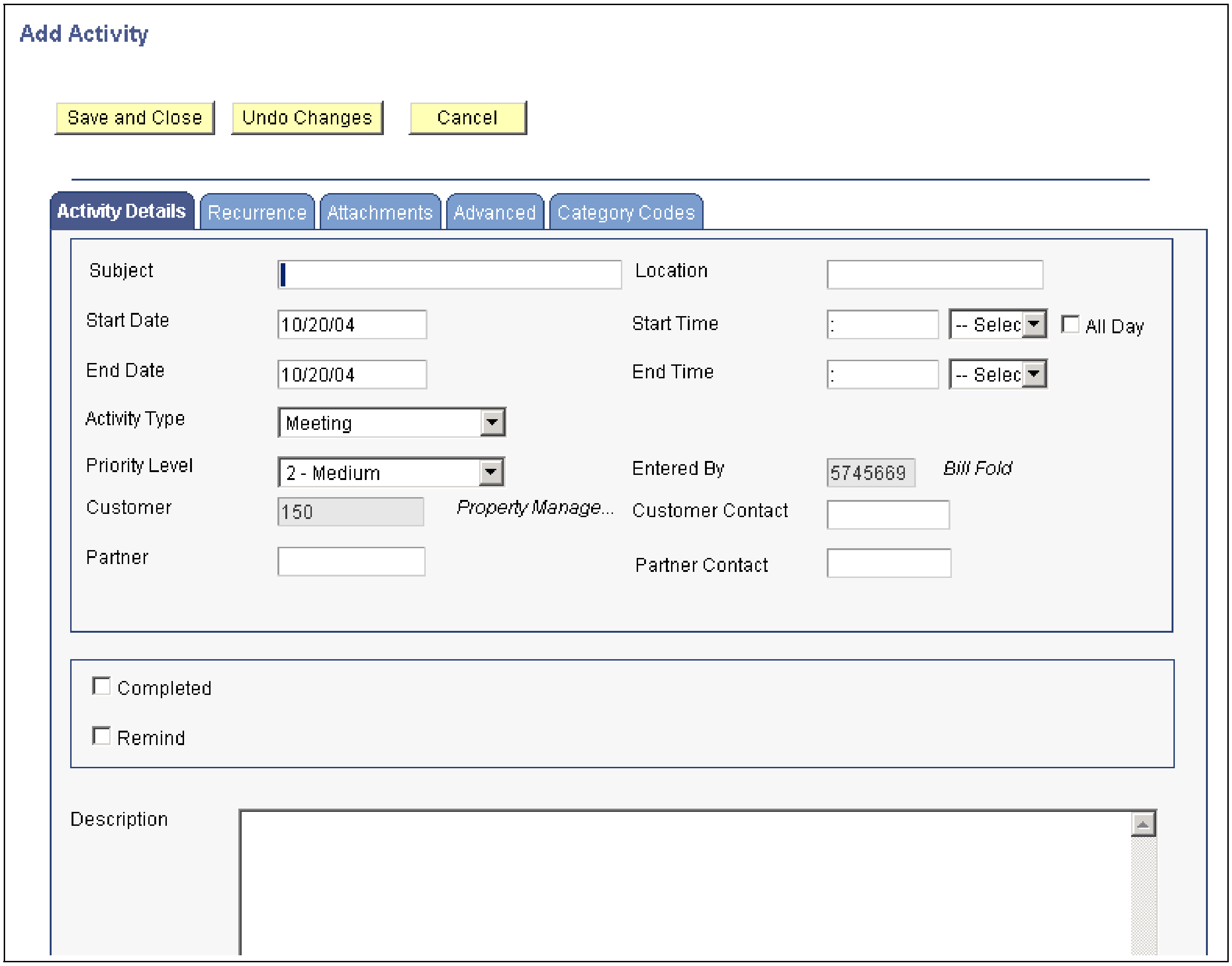
3: Low

Date Completed Enter the UTC time and date when the activity was completed.

Subject Enter a subject for the activity that appears in daily, weekly, or monthly calendar views.

Adding a New Activity for the Customer

Access the Add Activity form. This form is part of the Activities application, but after you create the activity it is associated with the customer.

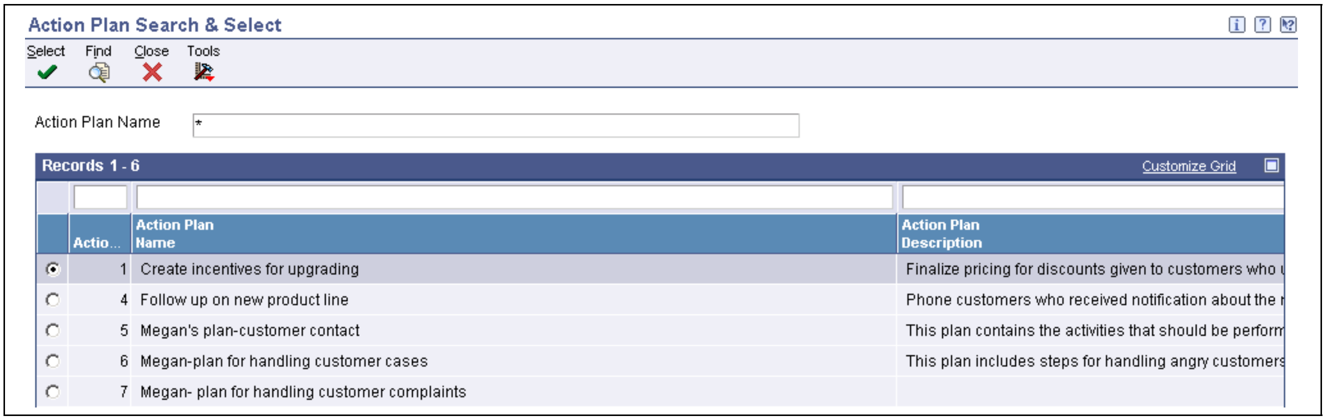


Add Activity form

Linking the Activity to an Action Plan

Access the Customer - Manage <customer name> form and click the Activities tab.

1. Find and select in the grid the activity you want to link to an action plan, and then click Link Action Plan.
2. On the Action Plan Search and Select form, find and select in the grid the action plans to which you want to link the activity, and then click Select.



Action Plan Search and Select form

Viewing or Modifying Customer Interactions

The Customer application is integrated with a third-party interaction product from Apropos Technologies, Inc. which helps you manage contact information. The integrated solution provides a foundation of predefined database queries, screen pops, and other integration points that reduce the cost and development time of customer-specific implementations.

When you click the Interactions link on the Customer - Manage <contact name> form's Activities tab, a separate browser window opens containing the Apropos interaction application.

See The Apropos Website at www.apropos.com.

Viewing or Modifying Customer Sales Information

This section discusses how to:

- View or modify sales team information.
- View or modify customer opportunities.
- Add an opportunity to the customer.
- View the pipeline.
- View or modify quotes or sales orders.
- Add a quote or sales order to the customer.

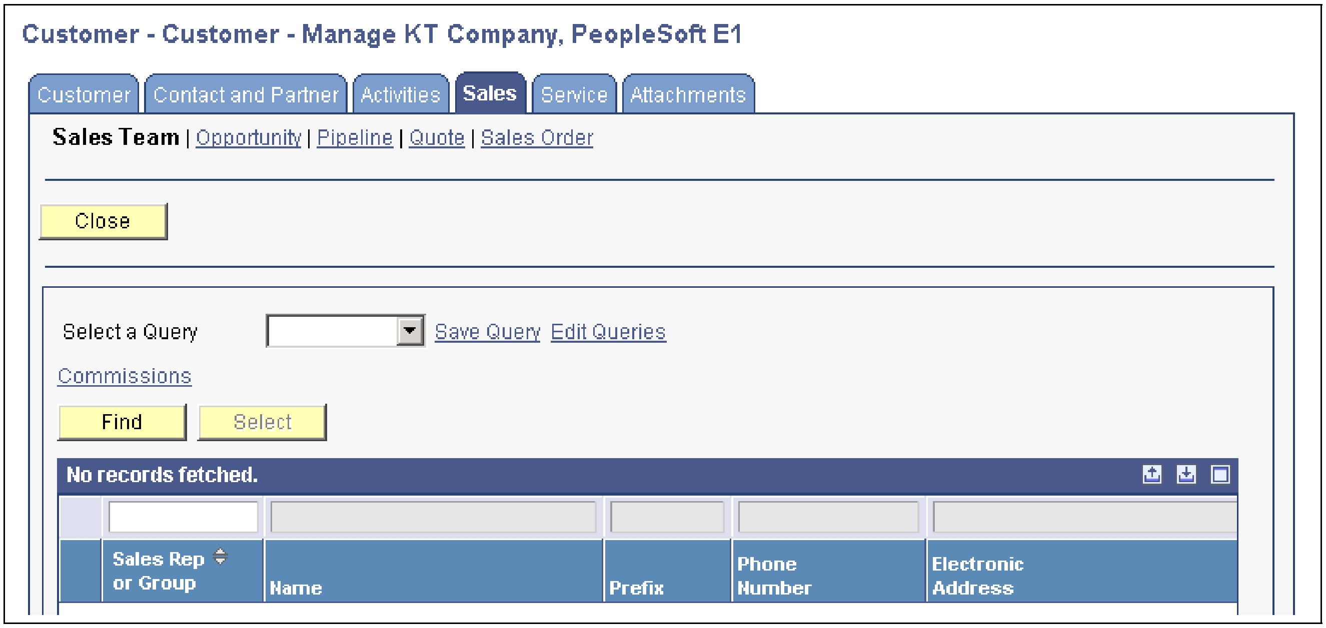
Forms Used to View or Modify Sales Information

Form Name	Form ID	Navigation	Usage
Customer - Manage <customer name>	W90CA08AA	Click the Sales tab. If necessary, click the Sales Team link.	Find and select a sales team, or remove a previously assigned sales team.
Customer - Manage <customer name>	W90CA08DA	Click the Opportunity link.	Find and select an opportunity, or add a new opportunity.
Customer - Manage <customer name>	W90CA08PA	Click the Pipeline link.	View pipeline information.
Customer - Manage <customer name>	W90CA08FA	Click the Quote link.	View and modify quote information, or enter a new quote.
Customer - Manage <customer name>	W90CA08GA	Click the Sales Order link.	View and modify order information, or enter a new order.
Sales Team Search and Select	W90CA041A	Click Assign Sales Team.	Assign a sales team.
Customer Master Commission Lookup	W42140A	Click Commissions.	View or modify commission information for the sales team.
Edit Sales Team	W90CA08AB	Click Sales Group Details	View or modify sales team information.
Customer - Add Opportunity	W90CB020C	Click Add.	Add a new opportunity.
Edit Sales Order	W42101D	Select a quote or sales order.	View or modify an existing sales order.
Manage Pending Order	W42101A	Click View Pending Orders.	View pending orders.
Customer - Enter New Order	W42101D	Click Add.	Enter a new quote or sales order.

Viewing or Modifying Sales Team Information

Access the Customer - Manage <customer name> (Sales Team) form.

1. Find and select the sales team whose information you want to view or modify, and then click Sales Group Details.
2. On Edit Sales Team, view or modify sales team information.
3. To assign a sales team to the customer, click Assign Sales Team and then select a sales team on the Sales Team Search and Select form.
4. To view, modify, or delete commissions, click Commissions to go to the Customer Master Commission Lookup form.



Customer - Manage <customer name> form: Sales tab: Sales Team link

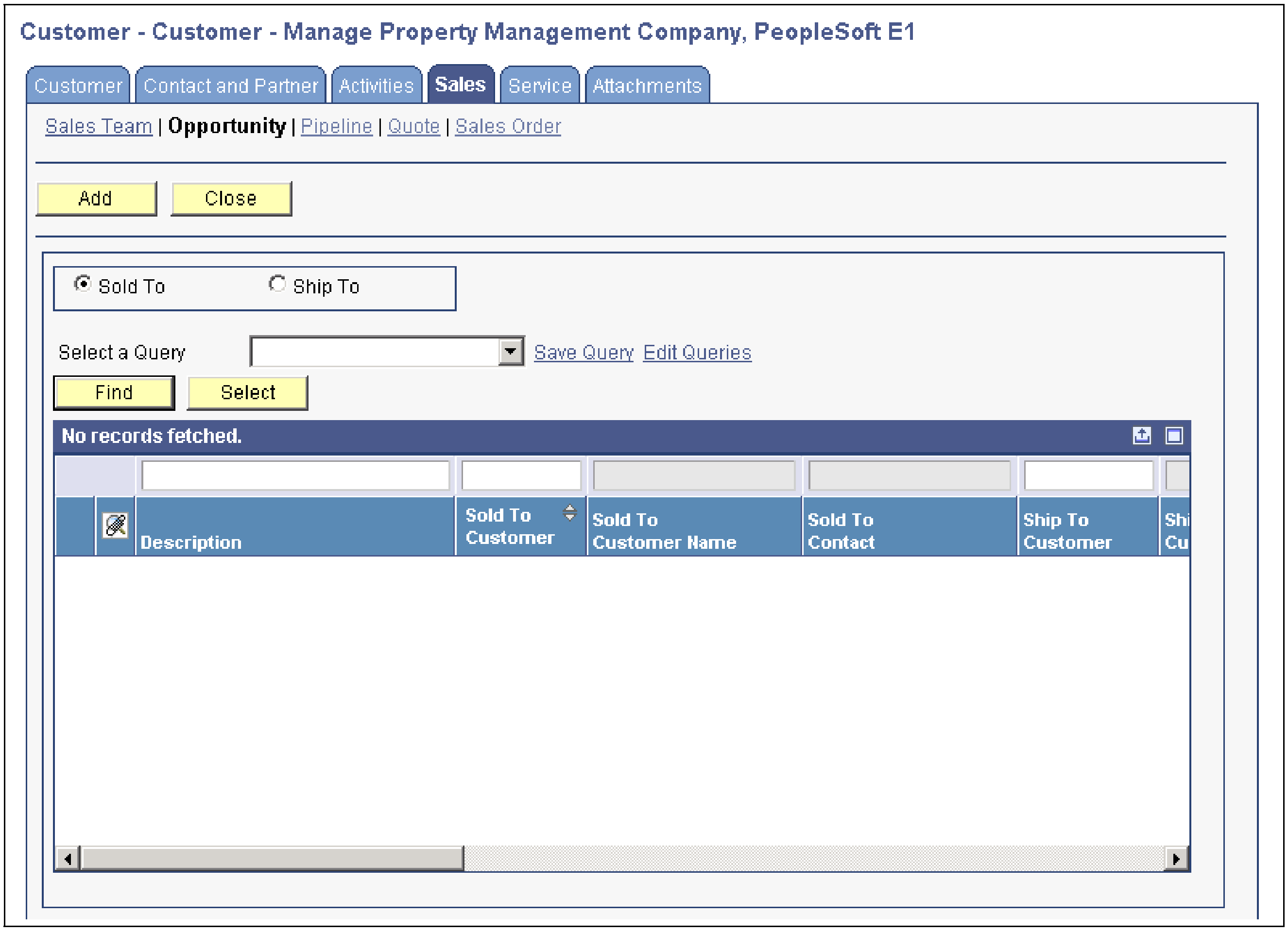
Viewing or Modifying Customer Opportunities

Access the Customer - Manage <customer name> form's Sales tab.

1. Find and select the opportunity you want to view or modify.

   Alternatively, you can display the opportunity record by clicking the opportunity's link under the Description column heading.

2. On Opportunity - Manage <opportunity name>, view or modify the opportunity information.
3. If you are ready to convert the opportunity to a quote or sales order, you can do so by clicking Convert to Quote or Convert to Sales Order, respectively.
4. When you are finished viewing or modifying the opportunity, save or undo any changes and then click Close.



Customer - Manage <customer name> form: Sales tab: Opportunity link

Sales Tab (Opportunity)

Select the Sales tab and then click the Opportunity link.

Description Enter a brief description of the opportunity.

Sold To Customer Enter the address book number of the opportunity’s customer.

Sold To Customer Name Enter the 40-character alphabetic name of the opportunity’s customer.

Ship To Customer Enter the 40-character alphabetic name of the customer receiving the opportunity.

Partner Enter the address book number of the partner who is associated with the opportunity.

Sales Cycle Enter the name of the sales cycle associated with the opportunity.

% Enter a number from 0 - 100 that is multiplied by the amount entered in the Potential field on the Opportunity to produce the opportunity’s potential.

Close Date Enter the date on which the opportunity is projected to close.

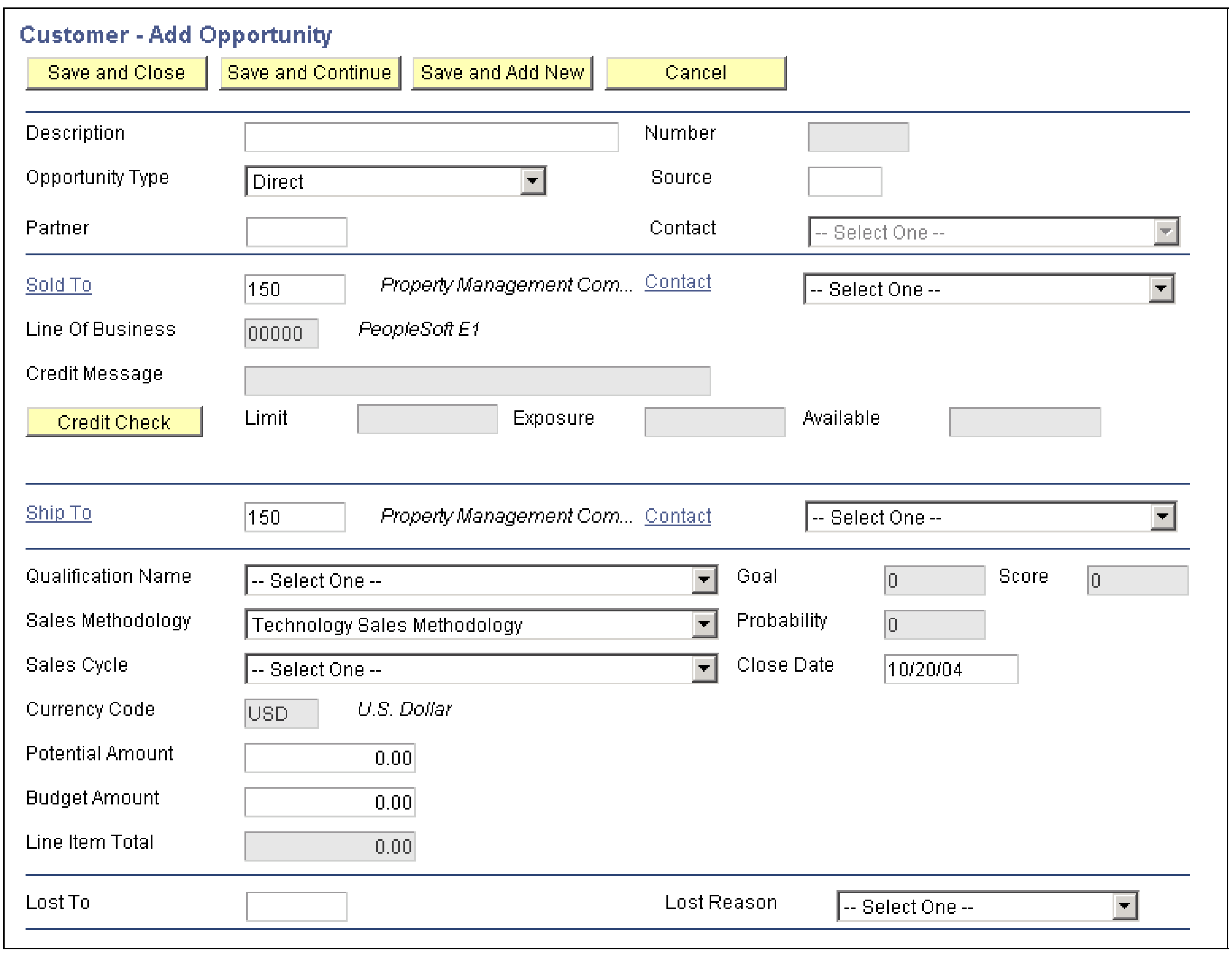
Potential Amount Enter the potential revenue amount that could be generated from the opportunity.

Currency Code	Enter the code for the currency that applies to the opportunity.
Opportunity Number	Enter the unique identifier related to the opportunity.

Adding an Opportunity to the Customer

Access the Customer - Add Opportunity form.

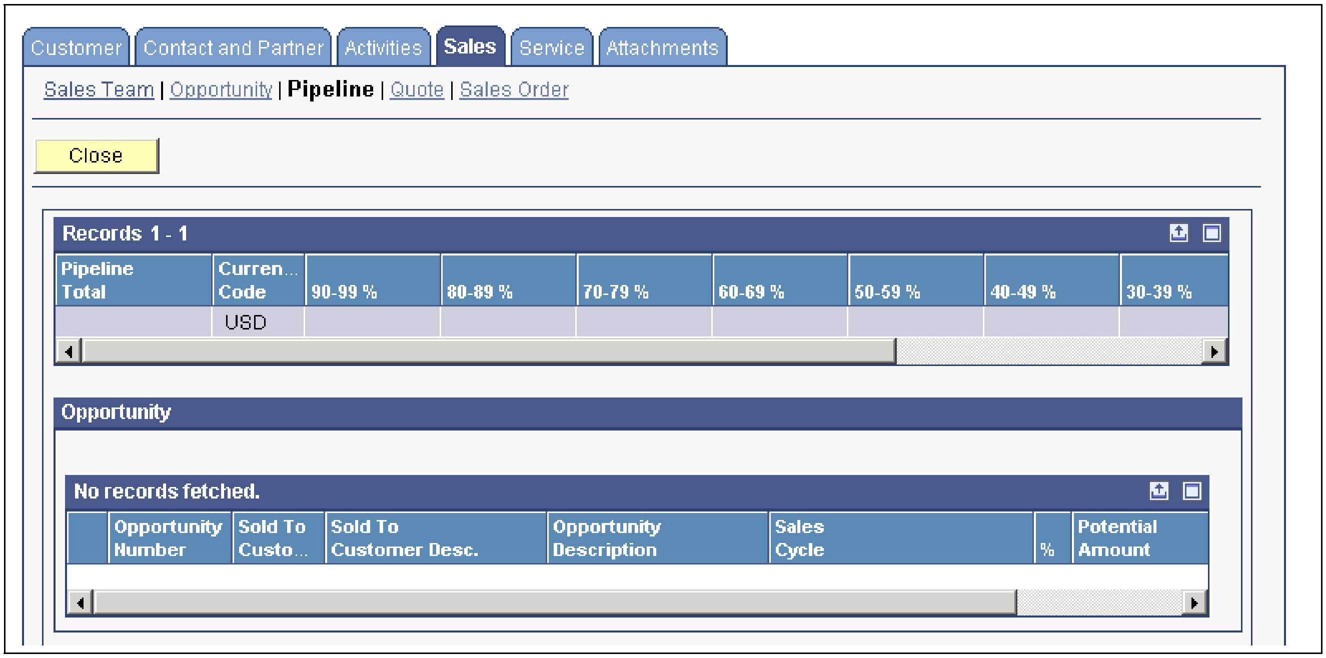
1. Enter information for the new opportunity.
2. If desired, click Credit Check to perform a credit check for the customer.
3. When you are finished adding opportunity information, select one of the following options:
   - Save and Close to save the new opportunity and exit the Customer - Add Opportunity form.
   - Save and Continue to save the new opportunity and remain on the Customer - Add Opportunity form.
   - Save and Add New to save the new opportunity and clear the fields on the Customer - Add Opportunity form so you can add a new opportunity.
   - Cancel to exit the Customer - Add Opportunity form without saving.



Add Opportunity form

Viewing the Pipeline

Access the Customer - Manage <customer name> form's Sales tab, and then click the Pipeline link to view pipeline information.

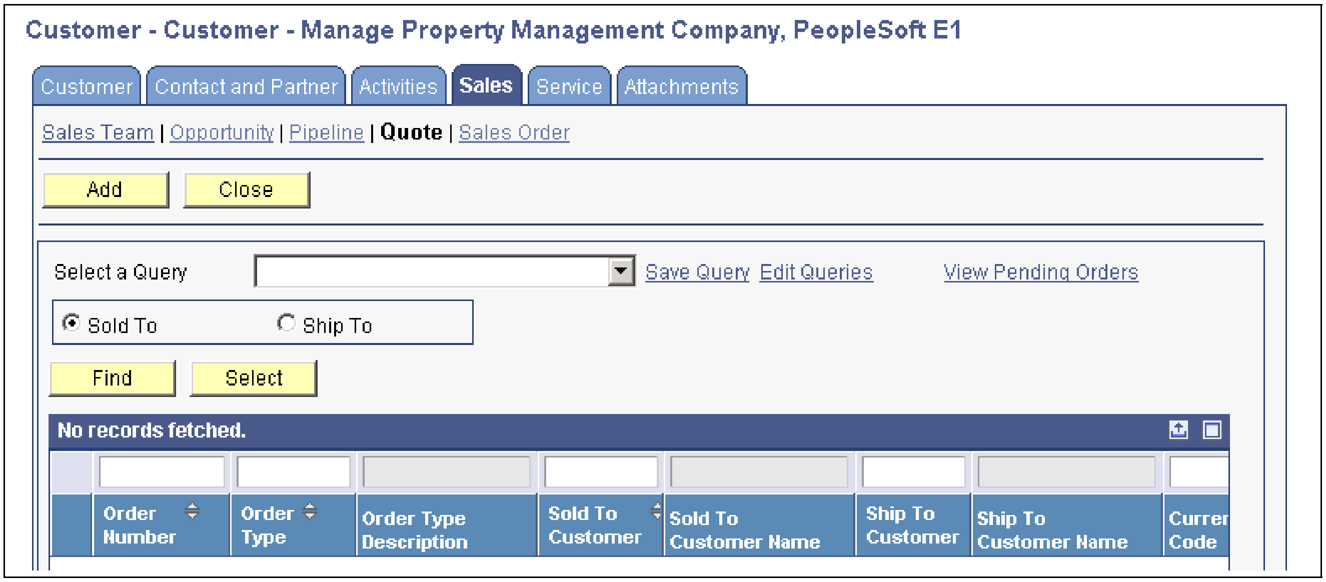


Sales tab Pipeline link

Viewing or Modifying Quotes or Sales Orders

Access the Customer - Manage <customer name> form's Sales tab, and then click either the Quote or Sales Order link.

1. Find and select in the grid the quote or sales order you want to view or modify.
2. On Edit Sales Order, view or modify quote or sales order information.
3. When you are finished viewing or modifying quote or sales order information, click Close to return to the Customer - Manage <customer name> form.



Sales tab Quote link

Sales Tab (Quote or Sales Order)

Select the Sales tab and then click the Quote or Sales Order link.

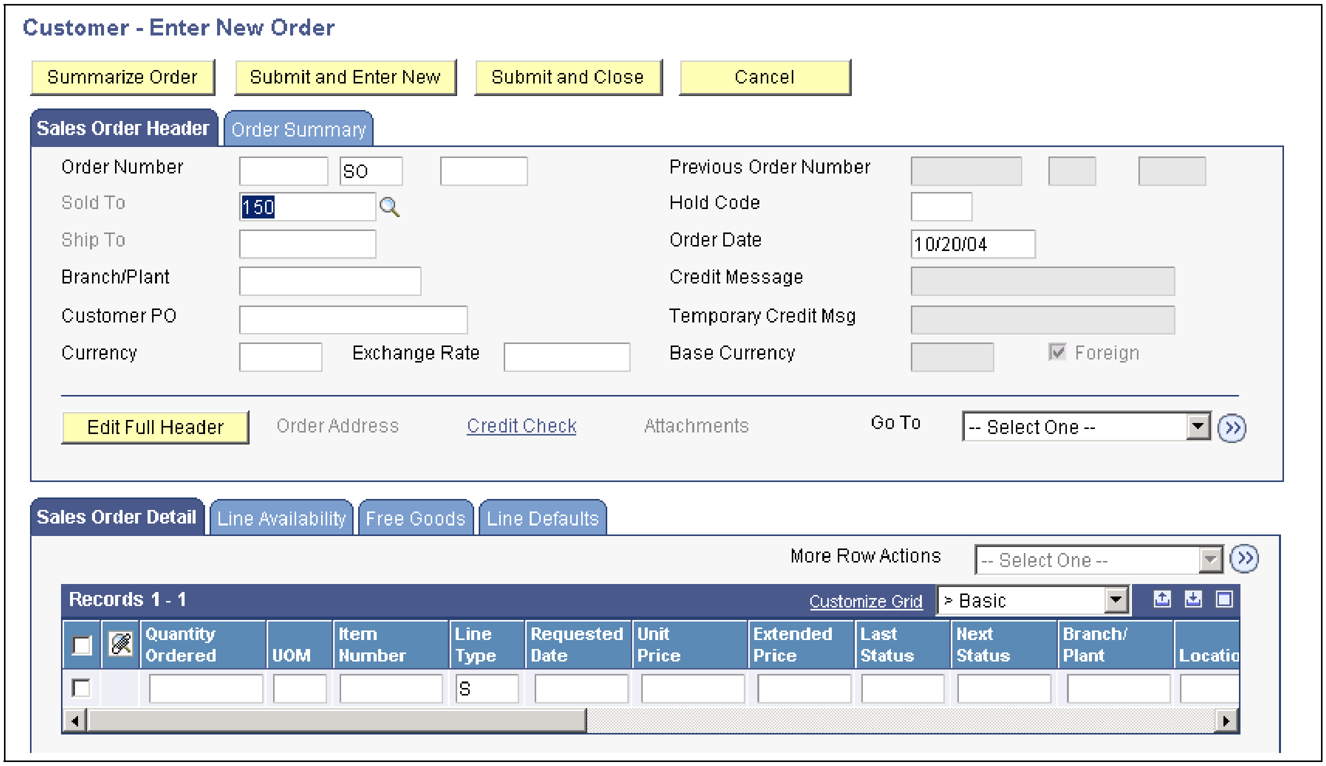
Order Number	Enter the number that identifies the sales order.
Order Type	Enter the user-defined code (system 00, type DT) that identifies the type of order.
Order Type Description	Enter a brief description of the order type.
Sold To Customer	Enter the address book number that identifies the customer to whom the order was sold.
Ship To Customer	Enter the address book number of the customer to whom you want to ship the order.
Currency Code	Enter the code for the currency that applies to the sales order.
Sold To Contact	Enter the line number for the customer contact to whom the order was sold.
Ship To Contact	Enter the line number for the customer contact to whom the order was shipped.
Order Date	Enter the date on which the order was entered into the system. This date determines which effective level the system uses for inventory pricing.

Adding a Quote or Sales Order to the Customer

Access the Customer - Enter New Order form.

1. Enter information for the new quote or sales order.
2. When you are finished adding quote or sales order information, select one of these options:
   - Summarize Order to save the new quote or sales order without submitting.
   - Submit and Enter New to submit the new quote or order and enter a new quote or order on the Customer - Enter New Order form.

- Submit and Close to submit the new quote or order and exit the Customer - Enter New Order form.
- Cancel to exit the Customer - Enter New Order form without saving.



Customer - Enter New Order form

Viewing or Modifying Service Information For Customers

This section discusses how to:

- View or modify equipment master information.
- View or modify service contract information.
- View or modify case information.
- Add a case to the customer.
- View or modify service work order information.

Forms Used to View or Modify Service Information

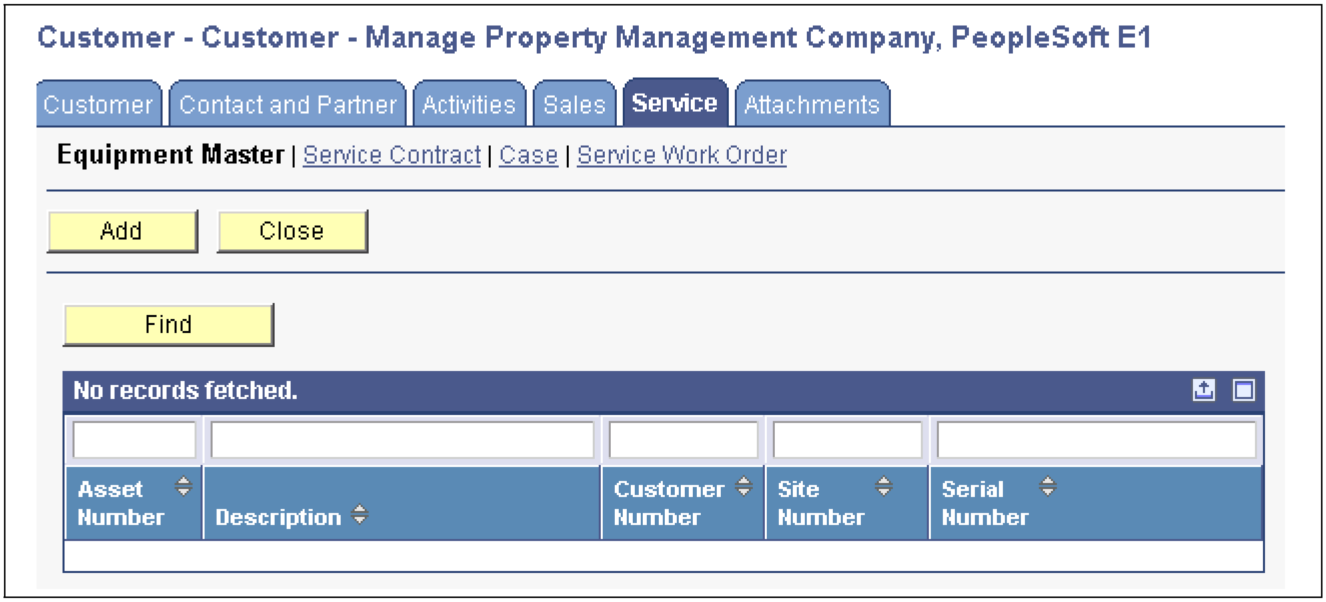
Form Name	Form ID	Navigation	Usage
Customer - Manager <customer name>	W90CA08EA	On the Service tab, click Equipment Master.	View or select an equipment master record.
Customer - Manager <customer name>	W90CA08SA	Click Service Contract	View or modify service contract information.
Customer - Manager <customer name>	W90CA08WA	Click Service Work Order	View or modify service work order information.
Equipment - Manage <equipment name>	W90CD001B	Select an equipment record on the Service tab (Equipment Master).	View or modify equipment records.
Customer - Contract Revisions	W1721A	Click Add on Customer - Manager <customer name> (Service Contract).	Add, modify, or delete a service contract record.
Customer - Work with Equipment Master	W1701A	Click Add on Customer - Manager <customer name> (Equipment Master).	Add, modify, or delete an equipment master record.
Customer - Add Work Order	W90CD002A	Click Add on Customer - Manage <customer name> (Service Work Order)	Add a new work order.

Viewing or Modifying Equipment Master Information

Access the Customer - Manage <customer name> form's Service Contract tab.

1. To view an equipment record on the Equipment - Manage <equipment name> form, select an equipment record in the Customer - Manage <customer name> form's grid by clicking the record's link under the Asset Number column.
2. To add an equipment record, click Add on the Customer - Manage <customer name> form's Service Contract tab (Equipment Master).

   On the Customer - Work with Equipment Master form, click Add and enter equipment information.



Customer - Manager <customer name> form: Service tab: Equipment Master link

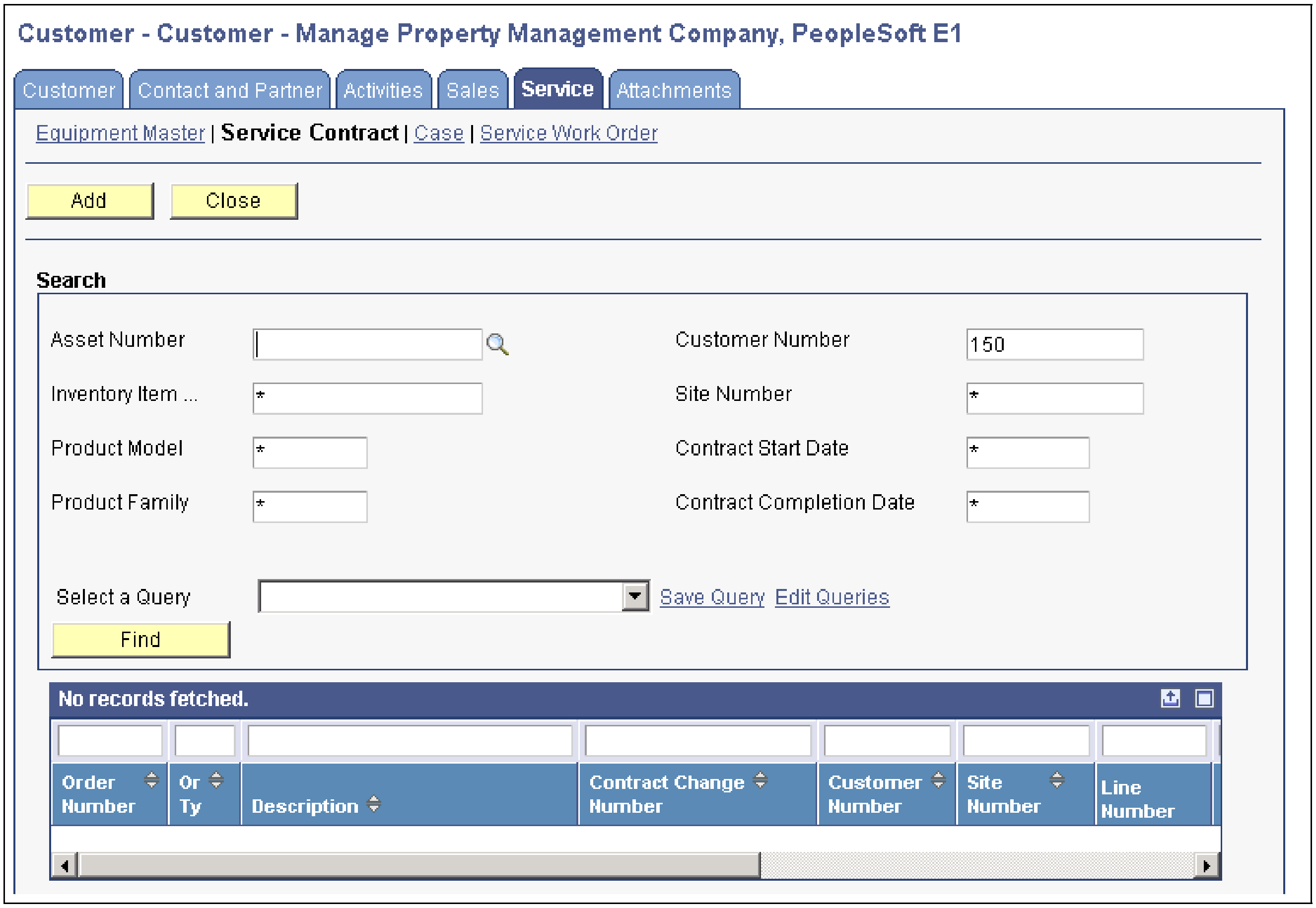
Viewing or Modifying Service Contract Information

Access the Customer - Manager <customer name> form's Service Contract tab, and then click Service Contract.

1. Select the service contract for which you want to view or modify service.

   Make changes on the Customer - Contract Revisions form.

2. To add a service contract, lick Add to display the Customer - Contract Revisions form and enter information for the new contract.



Customer - Manager <customer name> form: Service tab: Service Contract link

Service Contract

Select the Service tab and then click the Service Contract link.

Asset Number

Enter the identification code that represents an asset. You enter the identification code in one of these formats:

- Asset number (a computer-assigned, 8-digit, numeric control number).
- Unit number (a 12-character alphanumeric field).
- Serial number (a 25-character alphanumeric field).

Customer Number

Enter a number for the customer that corresponds to an address book record. If you enter a value other than an address book number such as the long address or tax ID, you must precede the entry with the special character defined in the Address Book constants.

Inventory Item

Enter the system-generated number for the item.

Site Number

Enter a number for the site that corresponds to an address book record.

Product Model

Enter the code that classifies an inventory item into a model for customer service. Some examples include: Laser Printer, Inkjet or Fax.

Contract Start Date

Enter the date on which you actually start work on the contract.

Product Family Enter the code that classifies an inventory item into a group for customer service. Some examples include: Laser Printer, Inkjet, or Fax.

Contract Completion Date Enter the date on which you actually completed work on the contract.

Order Number Enter the number that identifies the service contract.

Or Ty Enter the user-defined code (system 00, type DT) that identifies the type of order.

Description Enter a brief description of the service order.

Contract Change Number Enter the contract's system-generated change number. The change order number of the base contract is always initialized to 000. Each time you enter a change order for a contract, the system automatically increases the change order number by one. For example, the base contract is the change order number 000, the first change order is 001, the second is 002, and so on.

Line Number Enter a line number on the order.

Ln Ty Enter the code that controls how the system processes lines on the order. Codes include:

S: Stock item

J: Job cost

N: Non-stock item

F: Freight

T: Text information

M: Miscellaneous charges and credits

W: Work order

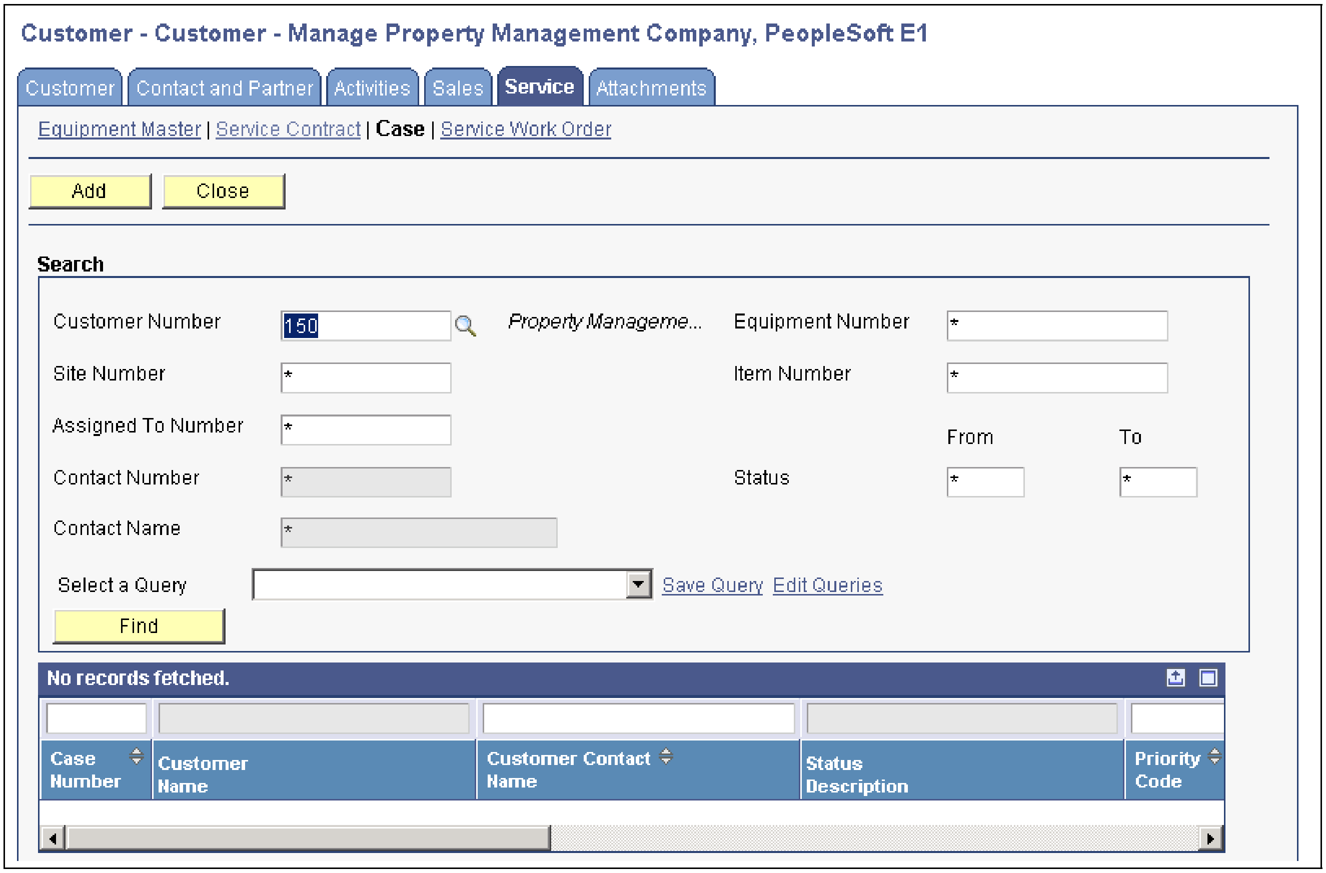
Short Item No Enter the inventory item number.

Service Package Enter the order's service package type, which is a combination of service order type and coverage type used to define service support to which the customer is contractually entitled. A service package also contains response time and coverage group. For example, you might have standard, premium, and platinum service packages.

Viewing or Modifying Case Information

Access the Customer - Manage <customer name> form's Service tab.

1. Search for and select in the grid the case whose information you want to view or modify.
2. On Case Update, view or modify case information.
3. When you are finished viewing or modifying case information, save or undo any changes, and then click Close.



Customer - Manage <customer name> form: Service tab: Case link

Service Tab

Select the Service tab and then click the Case link.

Customer Number Enter a number for the customer that corresponds to an address book record. If you enter a value other than an address book number such as the long address or tax ID, you must precede the entry with the special character defined in the Address Book constants.

Equipment Number Enter an identification code that represents an asset. The identification code must be in one of the following formats:

- Asset number (a computer-assigned, 8-digit, numeric control number)
- Unit number (a 12-character alphanumeric field)
- Serial number (a 25-character alphanumeric field)

Site Number Enter a number for the site that corresponds to an address book record.

Item Number Enter the system-assigned item number.

Assigned To Number Enter the address book number for the person to whom the case is assigned.

Status From Enter the case's beginning status.

Status To Enter the case's ending status.

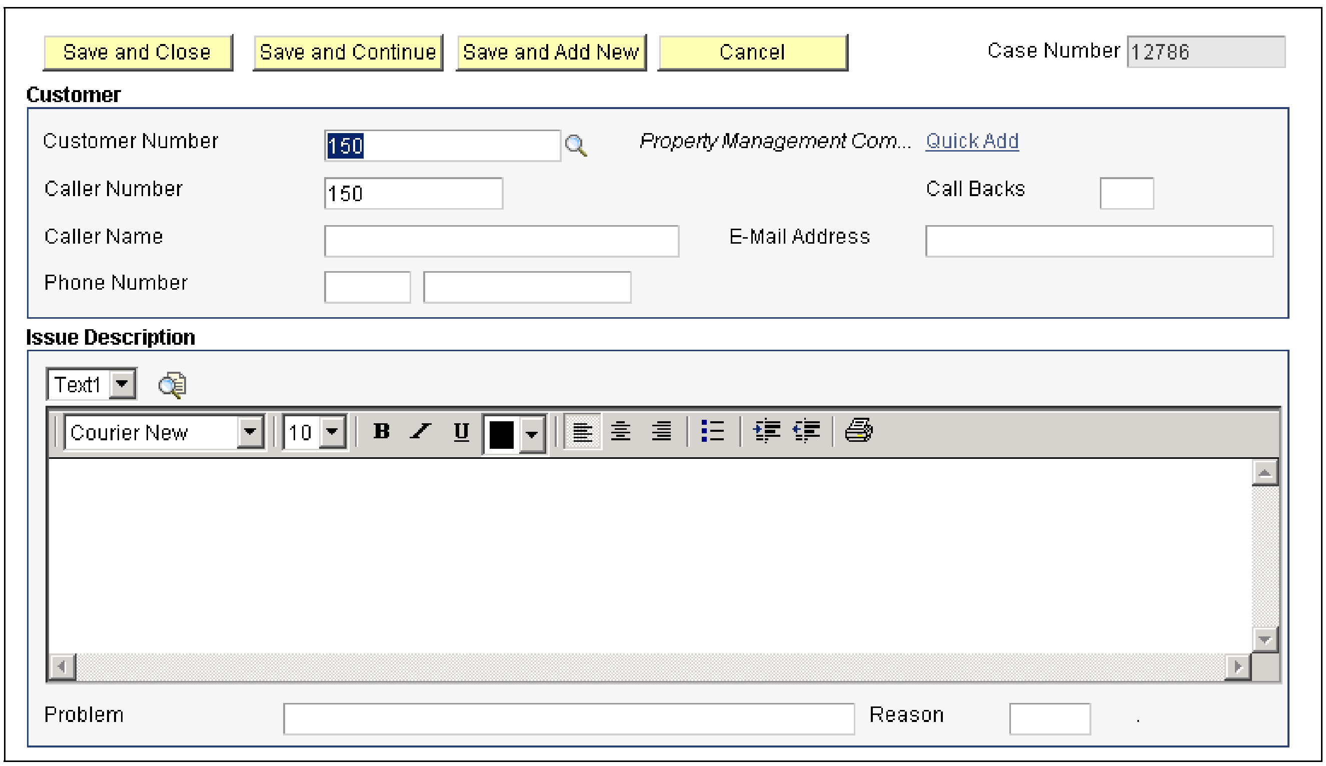
Case Number Enter a number that identifies the case.

Customer Contact Name	Enter the name of the caller, customer, or other contact.
Priority Code	Enter a value that indicates the severity of the customer issue.
Beginning Date	Enter the date on which the case becomes active.
Committed Date	Enter the commitment date that the system calculates for returning the maintenance request or work order.
Description	Enter a brief description of the customer issue.

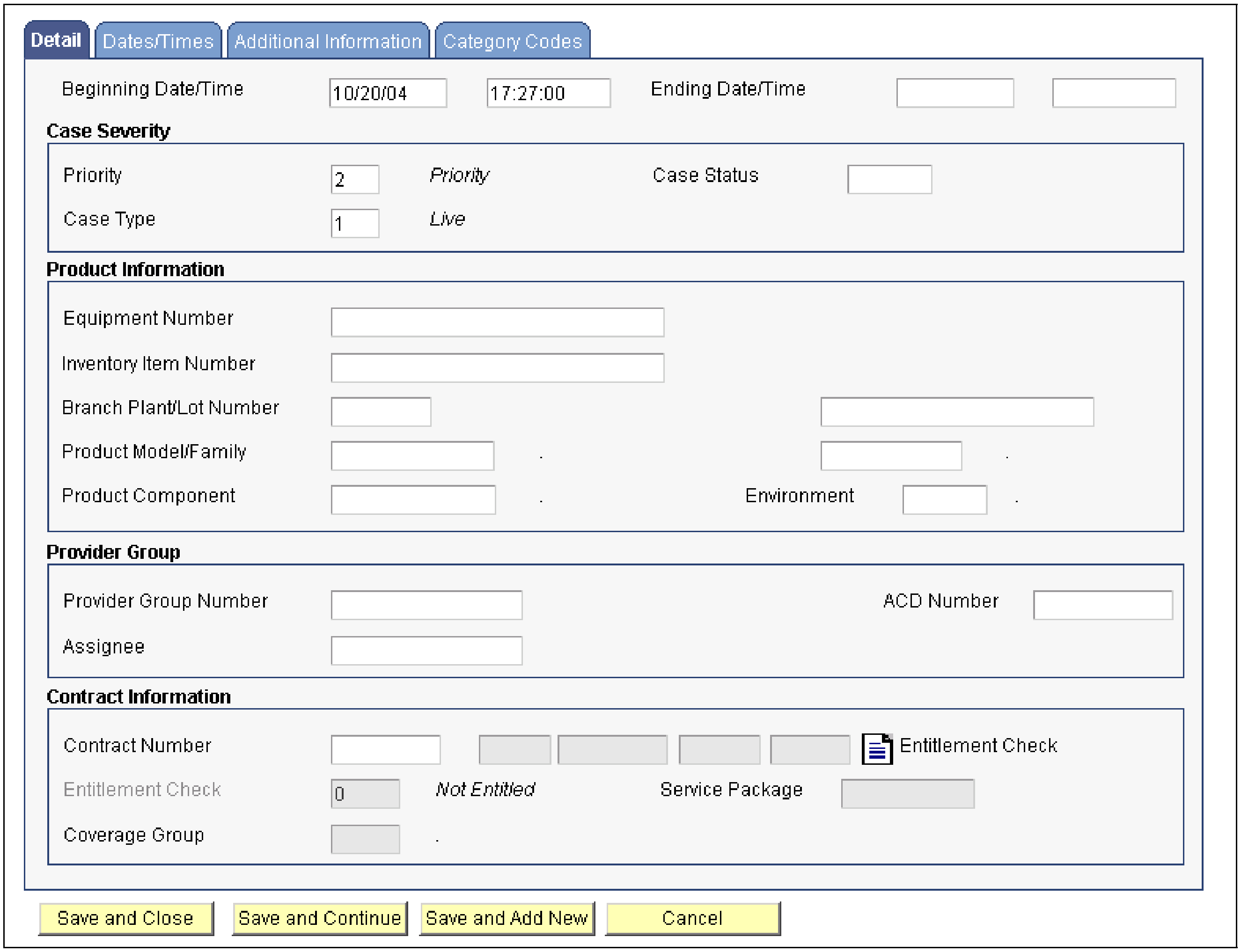
Adding a Case to the Contact

Access the Contact - Add Case form.

1. Enter information for the new case.
2. When you are finished adding case information, select one of these options:
   - Save and Close to save the new case and exit the Contact - Add Case form.
   - Save and Continue to save the new case and remain on the Contact - Add Case form.
   - Save and Add New to save the new case and clear the fields on the Contact - Add Case form so you can add a new case.
   - Cancel to exit the Contact - Add Case form without saving.



Customer - Add Case form (1 of 2)


Detail | Dates/Times | Additional Information | Category Codes

Beginning Date/Time 10/20/04 17:27:00 Ending Date/Time

Case Severity

Priority 2 *Priority* Case Status

Case Type 1 *Live*

Product Information

Equipment Number

Inventory Item Number

Branch Plant/Lot Number

Product Model/Family

Product Component

Environment

Provider Group

Provider Group Number

ACD Number

Assignee

Contract Information

Contract Number

Entitlement Check

Entitlement Check 0 *Not Entitled* Service Package

Coverage Group

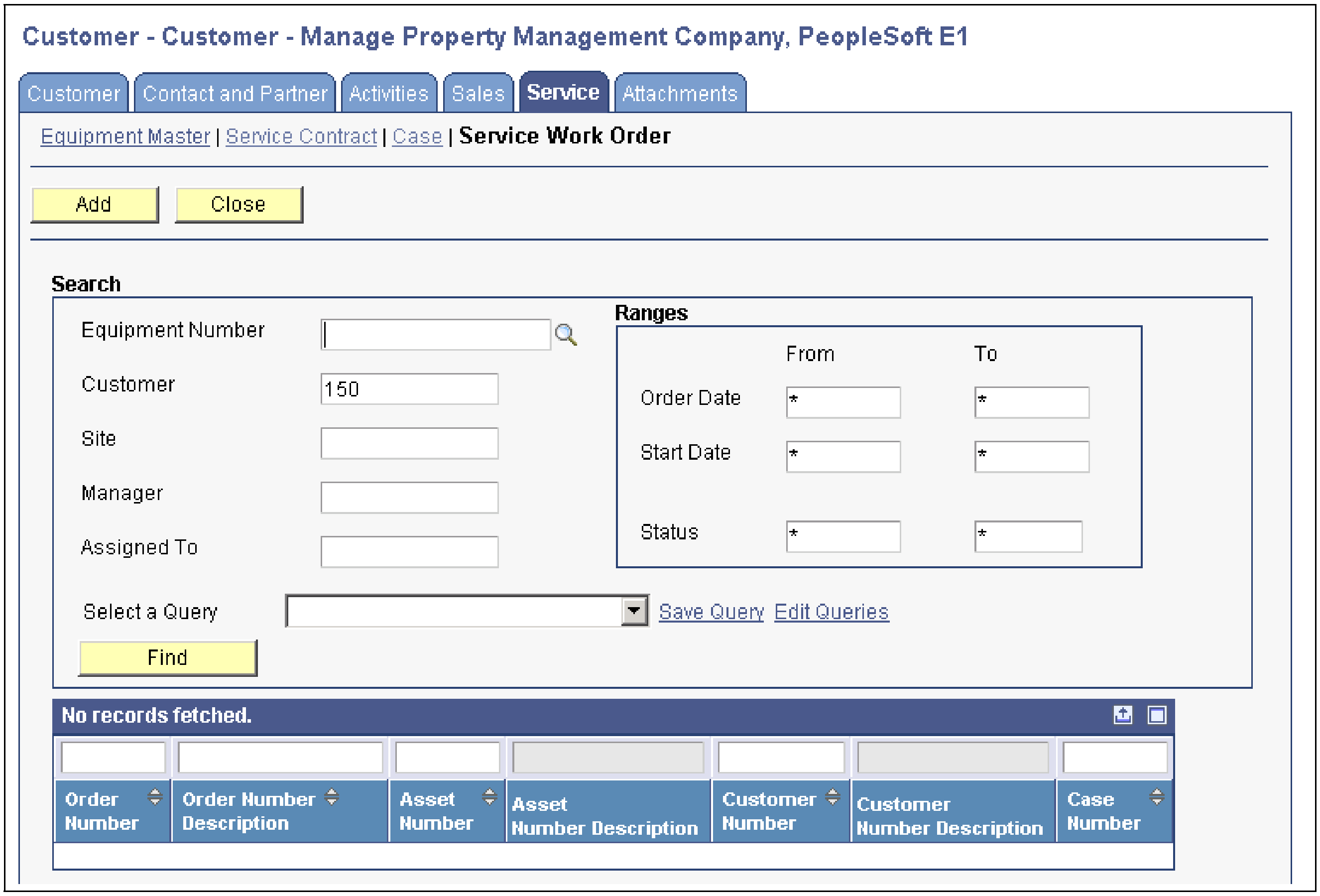
Save and Close | Save and Continue | Save and Add New | Cancel

Customer - Add Case form (2 of 2)

Viewing or Modifying Service Work Order Information

Access the Customer - Manager <customer name> form's Service tab and then click Service Work Orders.

1. Select the service work order you want to view or modify, and make changes on the Customer - Work Order Revisions form.
2. To add a service contract, click Add and enter information on the Add Work Order form.



Service tab: Service Work Order link

Service Work Order

Select the Service tab and then click the Service Work Order link.

Equipment Number Enter an identification code that represents an asset. The identification code must be in one of these formats:

- Asset number (a computer-assigned, 8-digit, numeric control number).
- Unit number (a 12-character alphanumeric field).
- Serial number (a 25-character alphanumeric field).

Customer Enter the customer's address book record.

Site Enter the address book long number that identifies the service site.

Manager Enter the address book number of the service manager.

Assigned To Enter the address book number for the person to whom the service work order is assigned.

Order Date From Enter the starting date for the order which was entered into the system. This date determines which effective level the system uses for inventory pricing.

Order Date To Enter the ending date for the order which was entered into the system. This date determines which effective level the system uses for inventory pricing.

Start Date From Enter the service start date for the order. You can enter this date manually, or have the system calculate it using a back scheduling routine. The routine starts with the required date and offsets the total leadtime to calculate the appropriate start date.

Start Date To Enter the service end date for the order.

Status From Enter the user-defined code (system 00, type SS) that describes the beginning status of the work order. Any status change from 90 through 99 triggers the system to automatically update the completion date.

Status To Enter the user-defined code (system 00, type SS) that describes the ending status of the work order. Any status change from 90 through 99 triggers the system to automatically update the completion date.

Viewing or Modifying Customer Attachments

This section discusses how to view, modify, and create customer attachments.

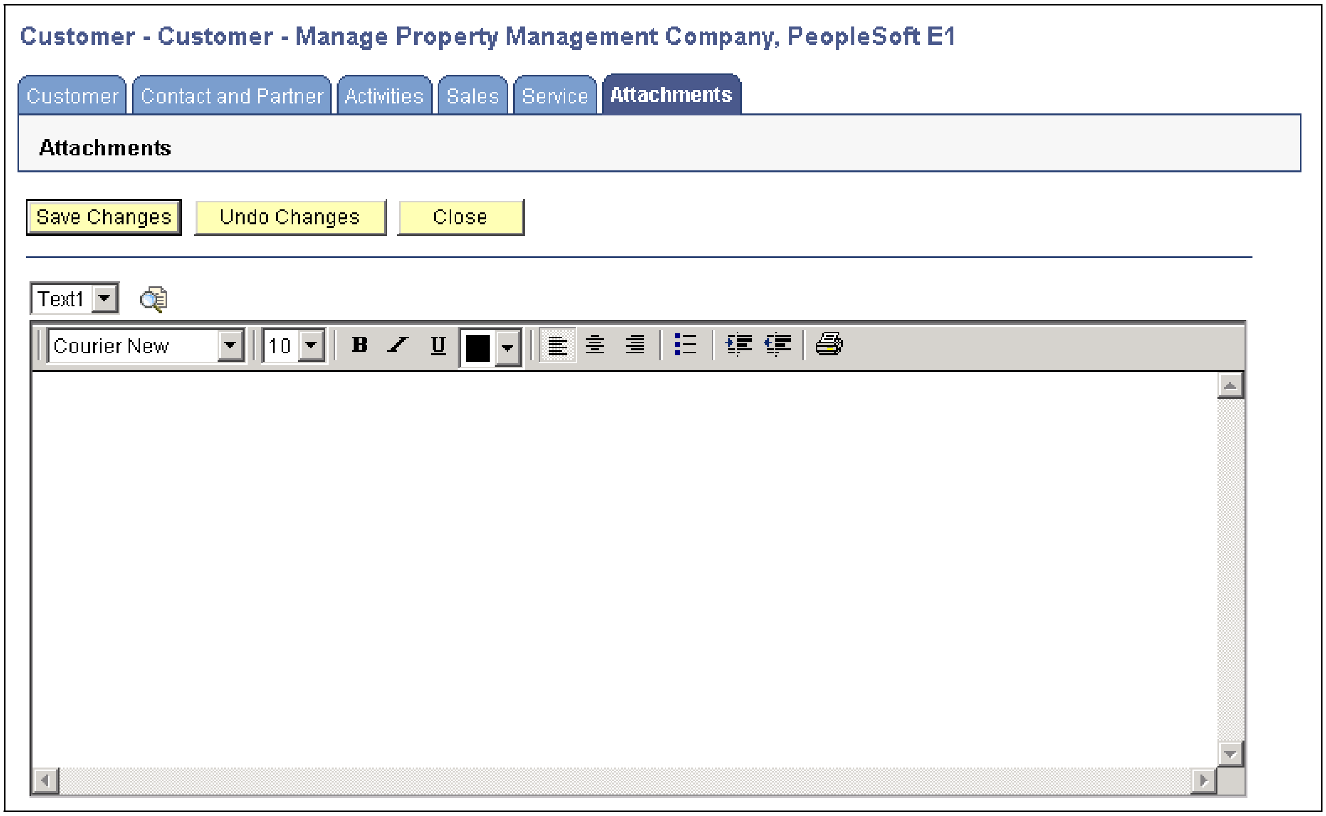
Form Used to View or Modify Attachments

Form Name	Form ID	Navigation	Usage
Customer - Manage <customer name>	W90CA086A	Click the Attachments tab.	View or modify attachments for the customer.

Viewing or Modifying an Attachment For a Customer

Access the Customer - Manage <customer name> form, and click the Attachments tab.

1. View or modify the message in the text area.
2. To create a different type of attachment for the contact such as an file or media object, click the magnifying glass button to access the Media Object Viewer.
3. When you are finished viewing or modifying attachments, save or undo any changes, and then close.



Attachments tab

Adding a New Customer

This section discusses how to:

- Set processing options for the Customer application.
- Create a new customer record.

Form Used to Add a New Customer

Form Name	Form ID	Navigation	Usage
Customer - Add Customer	W90CA082C	Click Add on Customer - Search For Customers.	Add a new customer record.

Setting Processing Options for the Customer Application (P90CA080)

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

Entry

Tax ID	Use this processing option to specify whether to display the Tax ID field when you add a customer record. You can also specify whether to disallow entry at this field.

Versions

1. Address Book (P01012) Version	Use this processing option to specify the version to use when you call the Address Book Master program (P01012) from the Related Links. If you leave this field blank, the system uses version *ZJDE0001*.
2. CRM Customer Processing (P90CA087) Version	Use this processing option to specify the version of the CRM Customer Master Business Function (P90CA087) to use. If you leave this field blank, the system uses version *ZJDE0001*.
3. Opportunity (P90CB020) Version	Use this processing option to specify the version of Opportunity (P90CB020) to use. If you leave this field blank, the system uses version *ZJDE0001*.
4. Quote Order Entry (P42101) Version	Use this processing option to specify the version of Quote Order Entry (P42101) to use. If you leave this field blank, the system uses version *ZJDE0001*.
5. Sales Order Entry (P42101) Version	Use this processing option to specify the version of Sales Order Entry (P42101) to use. If you leave this field blank, the system uses version *ZJDE000*1.
6. Contact (P90CA070) Version	Use this processing option to specify the version of Contact (P90CA070) to use. If you leave this field blank, the system uses version *ZJDE0001*.
7. Service Contract (P1721) Version	Use this processing option to specify the version of Service Contract (P1721) to use. If you leave this field blank, the system uses version *ZJDE0001*.

Process

1. Postal Code Editing	Use this processing option to activate postal code editing. Postal code editing first verifies that the postal code exists in the Postal Code Transactions table (F0117), and then uses information from the table to enter blank City, County, Country, and State fields.
2. Postal Code Address Retrieval	Use this processing option to activate Postal Code Address Retrieval. If the postal code is valid and address lines one through four are blank, address information can be retrieved from the Postal Code Address table (F0118). If the processing option is set to activate with the Postal Code Selection Window for multiple addresses, all available addresses for the postal code are displayed.
3. Phone Number Type	Use this processing option to specify the phone type (such as business, home, mobile, and so on) that the system uses on the Add Customer form. Values are specified in the 01|PH UDC table.
4. Organization Structure Type	Use this processing option to specify the organization structure the system uses for the Customer application's Parent Child Hierarchy view
5. Sales Team Member Search Type	Use this procession option to specify the default search type in the Employee Search and Select application when adding sales team members for the customer.

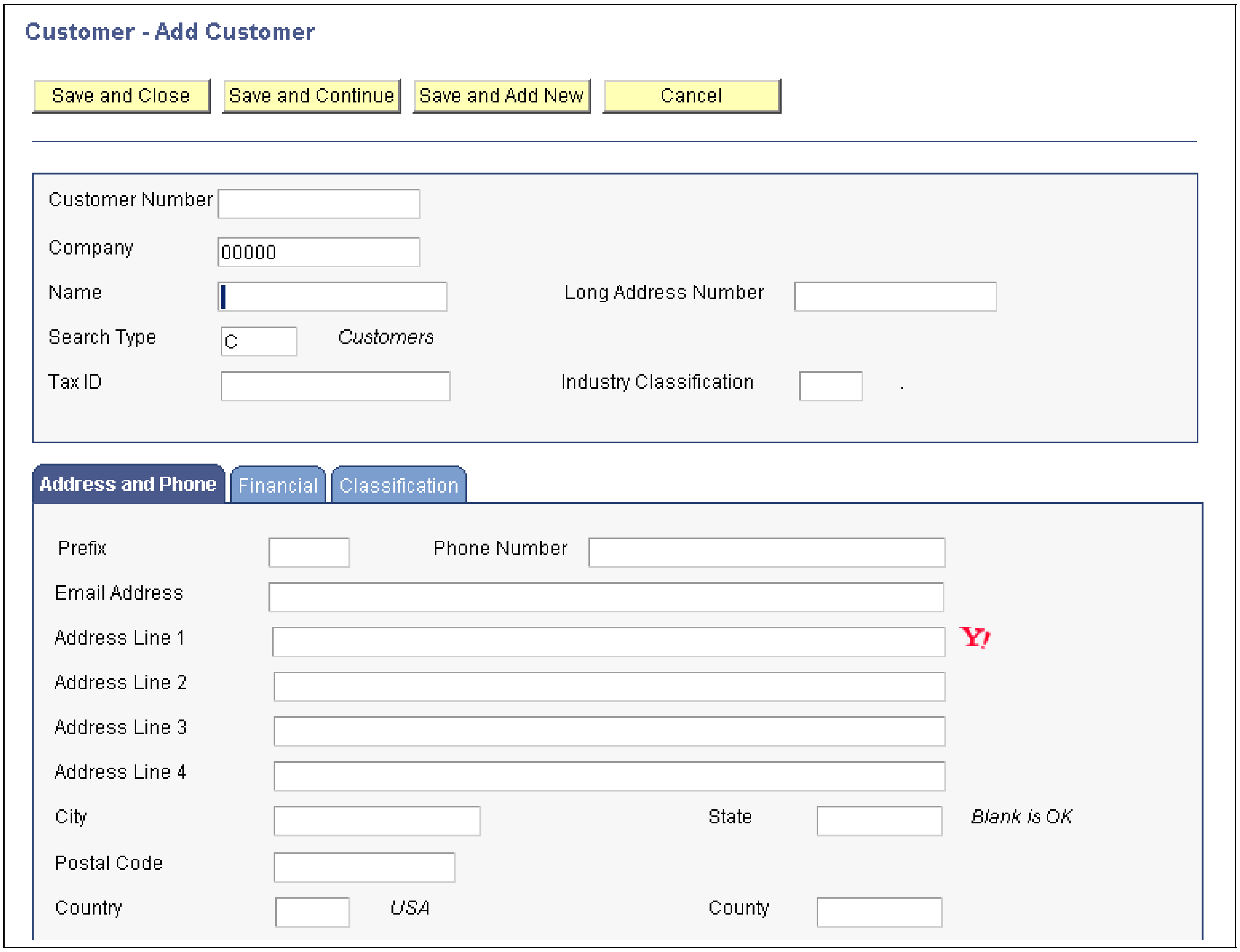
Mobile Client

1. Customer Action Security (Add and Change)	Use this processing option to specify whether a user has the authority to add customers while running on a mobile client.
2. Primary Address Action Security (Add and Change)	Use this processing option to specify whether a user has the authority to add and change primary addresses while running on a mobile client.
3. Alternate Address Action Security (Add, Change, and Delete)	Use this processing option to specify whether a user has the authority to add, change, and delete alternate addresses while running on a mobile client.
4. Phone and Fax Action Security (Add, Change, and Delete)	Use this processing option to specify whether a user has the authority to add, change, and delete phone and fax numbers while running on a mobile client.
5. Electronic Address Action Security (Add, Change, and Delete)	Use this processing option to designate whether a user has the authority to add, change, and delete electronic addresses while running on a mobile client.
6. Mobile Duplicate Data Entry	If you use Address Book's duplicate data entry feature, use this processing option to allow or prevent data entry on the mobile client. If you set this processing option to 1, the customer Name, City, and State fields are disabled on the mobile client when maintaining an existing customer.
7. Mobile Duplicate Tax ID Validation	If you use Address Book's duplicate tax ID entry feature, use this processing option to enable or prevent data entry on the mobile client. If you set this processing option to 1, the customer Tax ID and Country fields are disabled on the mobile client when maintaining an existing customer.

Creating a New Customer Record

Access the Customer - Add Customer form.

1. Enter customer information on the form.
2. If applicable, use the Address and Phone, Financial, and Classification tabs to enter additional customer information.
3. When you are finished adding customer information, select one of these options:
   - Save and Close to save the new customer and exit the Customer - Add Customer form.
   - Save and Continue to save the new customer and continue to the Customer Revisions Form.
   - Save and Add New to save the new customer and clear the fields on the Customer - Add Customer form so you can add a new customer.
   - Cancel to exit the Customer - Add Customer form without saving.



Customer - Add Customer form

Customer Number

Enter a number for the customer that corresponds to an address book record. If you enter a value other than an address book number such as the long address or tax ID, you must precede the entry with the special character defined in the Address Book constants.

Company

Enter the code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the Company Constants table (F0010) and must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions. You can use company 00000 for default values such as dates and automatic accounting instructions. You cannot use company 00000 for transaction entries.

Name

Enter up to 40 alphabetical characters for the customer name. You can enter dashes, commas, and other special characters, but the system does not use them when searching from this field for a name.

Long Address Number

Enter the name or number that identifies an address book record for the customer.

Search Type

Enter the user-defined code (system 01, type ST) that indicates the kind of address book record to search for.

Tax ID

Enter the identification code required by various tax authorities. This can be a social security number, federal or state corporate tax ID, sales tax number, and so on.

Industry Classification

Enter the code that classifies goods and services. This code can follow the format of any of these classification systems:

- Standard Industrial Classification (SIC) or North American Industry Classification System (NAICS). A numerical system used in the U.S. to classify goods and services. This code is four digits long for SIC, six digits long for NAICS.
- Harmonized System (HS). The international method of classifying goods. More than 50 countries use this code. An HS code can be up to 10 digits long.
- Standard Industrial Trade Classification (SITC). A numerical code system developed by the United Nations to classify goods used in international trade. International organizations use this code. An SITC code can be up to six digits long.

Address and Phone

Click the Address and Phone tab.

Prefix

Enter the telephone number's prefix or first segment. In the U.S. the prefix is the three-digit area code.

Phone Number

Enter the customer's phone number without the prefix or special characters, such as hyphens or periods. You can use any applicable telephone number format for a country.

Email Address

Enter the customer's email address or URL. For Electronic Address Type W - Internal email (Work Center), the Electronic Address field must be blank.

Financial

Click the Financial tab.

Parent Number

Enter the address book number of the parent company. The system uses this number to associate a particular address with a parent company or location. Any value that you enter in this field updates the Address Organizational Structure Master table (F0150) for the blank structure type. This address number must exist in the Address Book Master table (F0101) for validation purposes.

Credit Limit

Enter the total amount that you allow the customer to spend on purchases before the system sends a workflow message. This value is used throughout the credit management programs. The system maintains the credit limit at the customer (child) level, not the parent level. The system sends workflow messages for each customer who is over their credit limit. When you set up or change the credit limit, the system sends a workflow message to the credit manager that the change is pending approval. The change to the credit limit is not reflected in the customer record until it is approved by the credit manager.

Credit Manager

Enter the name of the credit manager responsible for approving changes to the credit limit. You must set up the credit manager in the address book, and then create an entry in the user-defined code table (system 01, type CR). When you set up the user-defined code value, you must also enter the credit manager's address book number in the Description 02 field.

Currency Code Enter the code for the currency that applies to the opportunity.

Payment Terms Enter the code that indicates the default payment terms for the customer. Payment terms determine the due date, discount amount, and discount due date that the system assigns when you create an invoice. Use a blank code for the payment terms that you use most frequently. Examples of payment terms include:

Blank: Net 15

1: 1/10 net 30

2: 2/10 net 30

D: Due upon receipt

N: Net 30

P: Prox 25th

Language Enter the user-defined code (system 01, type LP) that specifies the language to use on forms and printed reports. Before you specify a language, a code for that language must exist at either the system level or in the user preferences.

Tax Area Enter the code that identifies a tax or geographic area that has common tax rates and tax authorities. The system validates the code you enter against the Tax Areas table (F4008). The system uses the tax rate area in conjunction with the tax explanation code and tax rules to calculate tax and G/L distribution amounts when you create an invoice or voucher.

Tax Expl Code Enter the hard-coded user-defined code (system 00, type EX) that controls the algorithm that the system uses to calculate tax and G/L distribution amounts. The system uses the tax explanation code in conjunction with the tax rate area and tax rules to determine how the tax is calculated. Each transaction pay item can be defined with a different tax explanation code.

Tax Exempt Certificate Enter the number that tax authorities issue to tax-exempt individuals and companies to identify their tax-exempt status.

Price Group Enter the user-defined code (system 40, type PC) that identifies a customer group. You can group customers with similar characteristics, such as comparable pricing.

Classification

Click the Classification tab.

Category Code 01-30 Enter one of thirty reporting codes that you can assign to an address in the Address Book system. Use these codes to identify addresses for reports, mailings, and so on. Examples include:

01: Location or branch

02: Salesperson

03: New tenant

04: Credit officer

CHAPTER 7

Managing Partners

This chapter provides an overview of managing partner information and discusses how to:

- Add partners.
- View partner general information.
- View partner information for Employees, Customers, Leads, or Items.
- View partner information for Cases, Opportunities, or Activities.
- Assign and remove partners.

Understanding the Partners Application

The Partners application helps you manage partner information by providing you with this functionality:

- Add new partner records.
- View partners who are previously associated with customers, employees, items, sales leads, cases, opportunities, or activities.
- View and assign partner contacts to cases, opportunities, or activities.
- Create and maintain partner detail information, including single or multiple addresses, single or multiple contacts, notes, and attachments through PeopleSoft EnterpriseOne Address Book.
- Modify or delete partner information as needed through Address Book.

The Partner application enables you to view partners who are currently assigned to a customer, employee, item, sales lead, case, opportunity, or activity. You can also assign a partner to a customer, employee, item, sales lead, case, opportunity, or activity, or remove an assignment.

You create a partner record by using the Partner application's Add function. You can also add partners through Address Book, making sure to assign the Partner (PA) search type.

See *PeopleSoft EnterpriseOne Address Book 8.11 PeopleBook*, "Entering Address Book Records," Entering Address Book Records.

View Partners

The Partner applications enables you to view general partner information as entered through either the application's Add function or through Address Book.

You can also view detailed information for a partner that has been associated with a customer, employee, item, or sales lead. In addition, you can view just the name, city, and state of the partner assigned to a case, opportunity, or activity.

The Partner feature is integrated into the Customer, Employee, Item, and Leads applications using a Partner tab, and into Case, Opportunities, and Activities applications using a Partner linked field. You view partners or partner information by launching the appropriate application. For example, to view partner information that is associated with an item, launch the Item Inquiry application and locate the appropriate item record.

If a partner has not been associated with a customer, employee, item, sales lead, case, opportunity, or activity, there is no partner for that record.

You can use the Find function to view partner information in the Employee, Customer, Leads, and Items application. This feature does not locate all partners in the system, but it helps you locate one or more specific partners that are already assigned to the employee, customer, lead, or item. For example, if you have dozens of partners that are associated to an item, you can use the find feature to locate the partners in a particular state or city. To do so, enter the search parameters in the grid and click Find.

From the Employee, Customer, Leads, Item Inquiry, or Opportunity applications, you can access the Address Book Revision form for the partner. Use this form to view, add, revise or delete partner information. You can also view, add, revise or delete contacts by selecting Who’s Who from the Row menu.

From the Opportunity, Case Entry, and Activity applications, you can view only the name of the partner that is currently assigned to the opportunity, case, or activity. And, if there are contacts associated with the partner, you can view the current contact.

Adding Partners

This provides an overview of adding partners and discusses how to:

- Set processing options for the Partner application.
- Add a new partner record.

Form Used to Add Partners

Form Name	Form ID	Navigation	Usage
Partner - Address Book Revision	W01012A	EnterpriseOne Menus, Customer Relationship Management, CRM Foundation, CRM Foundation Daily Processing (G90C01), Partner On Partner - Work With Addresses, click Add.	Add a partner.

Setting Processing Options for the Partner Application (P01012)

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

Entry

1. Supplier Master

Use this processing option to specify whether to display the Supplier Master Information form when adding an address book record. To display the Supplier Master form, you must activate this processing option and enter a value of

Y in the Payables field, which is located on the Additional tab on Address Book Revision. Values are:

Blank: Do not display the Supplier Master form.

1: Display the Supplier Master form.

2. Customer Master

Use this processing option to specify whether to display the Customer Master Information form when adding an address book record. To display the Customer Master form, you must activate this processing option and select the Receivables option on the Additional tab on Address Book Revisions. Values are:

Blank: Do not display the Customer Master form.

1: Display the Customer Master form.

3. S/WM

Use this processing option to specify whether to display the CSMS (Customer Service Management System) form when adding an address book record. To display the CSMS form, you must activate this processing option and activate the CSF flag in the Customer Service Constants table (F17001). Values are:

Blank: Do not display the CSMS form.

1: Display the CMSM form.

4. Tax ID

Use this processing option to specify whether to display or disable the Tax ID field on the Address Book Revision form. When you disable a field, you cannot enter data into it. Values are:

Blank: Display the Tax ID field.

1: Hide the Tax ID field.

2: Disable the Tax ID field.

Defaults

1. Search Type

Use this processing option to specify the default value that is used in the Search Type field on the Work with Addresses form. Use the visual assist for a list of valid search types. If you leave this processing option blank, the system uses * as the default value, which instructs the system to locate all address book records.

2. Type Code

Use this processing option to specify the value from UDC 01/W0 that the system supplies as the default in the Type Code field when you make an entry in the Who's Who table. Values include:

Blank: No attention line appears in a mailing address.

A: Attention Name. This appears in the attention line of a mailing address except where other type codes are used.

B: Billing Name. This appears in the attention line of an address when bills are sent.

C: Contact Name. This is the name of the IRS contact person that is used in 1099 processing.

E: Emergency Contact. This is the person to contact whenever an emergency occurs that involves the person or company identified in the address book record.

O: Other. This is used for all other purposes.

T: 1099 Legal Name. This is the name used by the 1099 process when the legal name, according to the IRS, is different from the mailing name in the Address Book table.

Versions

1. Address Book MBF (P0100041) Version

Use this processing option to specify the version of the Address Book MBF (P0100041) to use. If you leave this field blank, the system uses version ZJDE0001.

2. Customer Master (P03013) Version

Use this processing option to specify the version of the Customer Master program (P03013) to use when you add or change address book information. If you leave this field blank, the system uses version ZJDE0001.

3. Supplier Master (P04012) Version

Use this processing option to specify the version of the Supplier Master program (P04012) to use when adding or revising address book information. If you leave this field blank, the system uses the default version, ZJDE0001.

Process

1. Self Service

Use this processing option to activate the Self Service functionality for JAVA/HTML. Self Service enables customers and suppliers to modify their existing address and mailing information using the internet. Values are:

Blank: Do not activate Self Service.

1: Activate for customers

2: Activate for suppliers

2. Postal Code Editing

Use this processing option to activate postal code editing. Postal code editing verifies that the postal code exists in the Postal Code Transactions table (F0117). If the postal code exists in the Postal Code Transactions table and the City, County, country, and State fields are blank; the system uses the information from the Postal Code Transactions table. If the postal code does not exist in the Postal Codes Transactions table, the system returns a warning. Values are:

Blank or *0:* Do not activate Postal Code Editing.

1: Activate Postal Code Editing.

3. Postal Code Address Retrieval

Use this processing option to activate Postal Code Address Retrieval. If the postal code is valid and address lines one through four are blank, address information can be retrieved from the Postal Code Address table (F0118). If the processing option to activate with the Postal Code Selection Window for multiple addresses is set, all available addresses for the postal code are displayed. Values are:

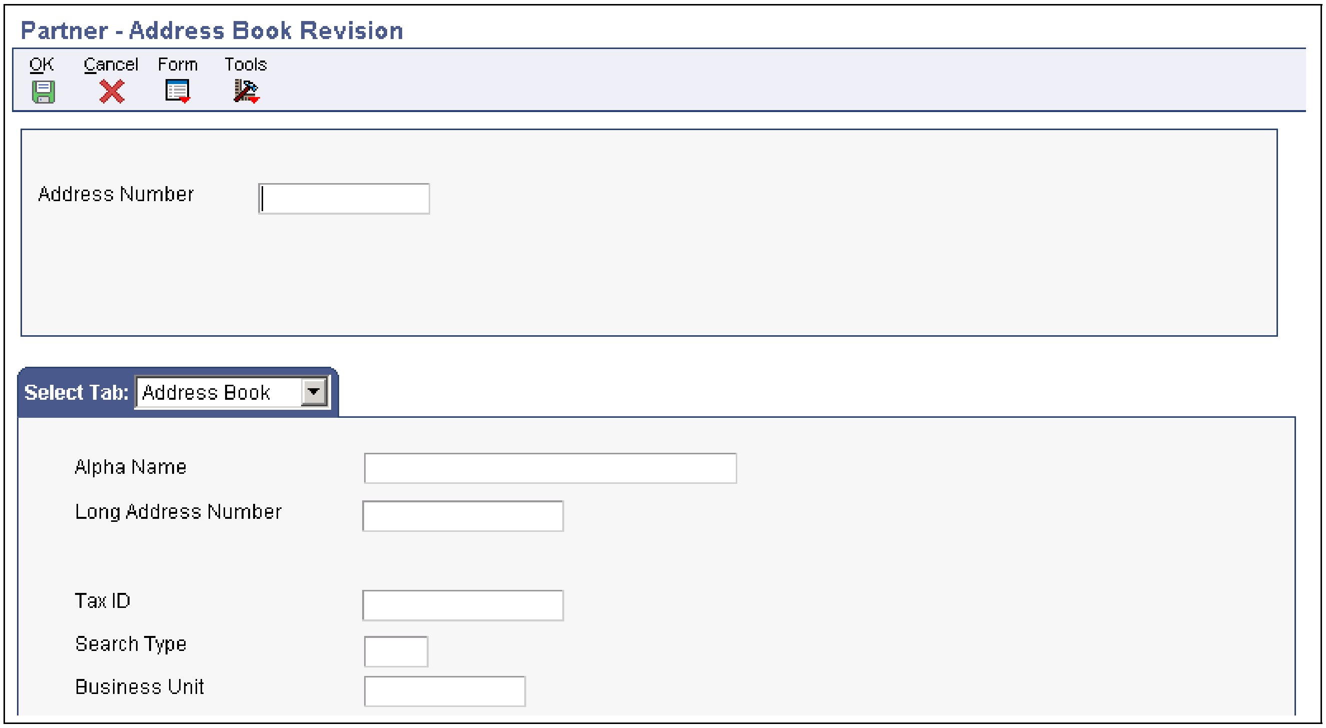
Blank or *0:* Do not activate Postal Code Address Retrieval.

1: Activate with the Postal Code Selection Window for multiple addresses.

2: Activate to retrieve the address information for a single address.

Adding a New Partner Record

Access the Partner - Work With Addresses form.



Partner - Address Book Revision form

Address Book Tab

Address Number

Enter the number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

Alpha Name

Enter text that names or describes an address. This 40-character alphabetic field appears on a number of forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.

Long Address Number

Enter the user-defined name or number that identifies an address book record. When you set up suppliers using a long address number, you can access the supplier number more quickly. For example, when you enter a voucher, you use the long address number preceded by the special character assigned to long address numbers in Address Book constants in the Supplier Number field. The system converts the long address number to the supplier number.

Tax ID

Enter the identification code required by various tax authorities. For US employees, the Tax ID is a social security number. For Canadian employees, the Tax ID must be a valid and unique Social Insurance Number (SIN).

Search Type

Enter the user-defined code (01/ST) that specifies the kind of address book record to search for. This value must be PA for partner.

Business Unit

Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant. You can assign a business unit to a document, entity, or person for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business unit to track equipment by responsible department. Business unit security might prevent you from viewing information about business units for which you have no authority.

Mailing Tab

Mailing Name

Enter the company or person to whom billing or correspondence is addressed.

Address Lines 1–4

Enter the mailing address for an employee, customer, or supplier in the Address Book system.

Effective Date

Enter the date on which an address, item, transaction, or table record becomes active.

Additional 1 Tab

Payables Y/N/M

Enter the code that identifies the address as a supplier. Values are:

Y: Yes, this is a supplier. A processing option specifies whether the supplier master record appears automatically after you add an address.

N: No, this is not a supplier. This code does not prevent you from entering a voucher for the address. Code N is informational only unless you set a processing option. In this case, a warning message appears if both the Payables and Receivables fields are N.

M: This is a miscellaneous, one-time supplier. This code does not prevent you from entering multiple vouchers for the address.

F: This is a supplier with a foreign address. The IRS requires U.S. companies to identify suppliers with foreign addresses for 1099 reporting. You should assign tax authorities as suppliers. This enables tax payments to be made to tax authorities.

Employee Group Approvals

Enter the Employee Group used only in Approval Processing

AR/AP Netting

Select this option to indicate whether you can use an address in the A/R and A/P netting process. When this option is selected, AR/AP Netting can be used.

Add'l Ind Tax ID

Enter the identification number assigned by a tax authority to an individual, in addition to the primary Tax ID number (TX1).

Tax Exempt Certificate

Enter the number that tax authorities issue to tax-exempt individuals and companies to identify their tax-exempt status.

Person/Corporation Code

Enter the code that designates the type of taxpayer. For 1099 reporting for U.S. suppliers and foreign suppliers, the system chooses only records with a code of P or N. Values for U.S. entities are:

Blank or *C:* Corporate entity (the Tax ID prints as 12-3456789)

P: Individual (the Tax ID prints as 123-45-6789)

N: Noncorporate entity (the Tax ID prints as 12-3456789)

Values for non-U.S. entities are:

1: Individual

2: Corporate entity

3: Both an individual and a corporate entity

4: Noncorporate entity

5: Customs authority

Credit Message
Enter a value in the user-defined code table 00/CM that indicates the credit status of a customer or supplier. Examples are:

1: Over credit limit

2: Requires purchase order

3: Not on contract maintenance agreement. The credit message displays on inquiry and transaction entry forms in the Accounts Payable, Sales Order Management, and Procurement systems. The system displays the temporary credit message in the Accounts Receivable system.

Language
Enter the user-defined code (01/LP) that specifies the language to use on forms and printed reports. Before you specify a language, a code for that language must exist at either the system level or in your user preferences.

Industry Classification
Enter a code that classifies goods and services. This code can be in the format of any one of the these classification systems:

- Standard Industrial Classification (SIC) or North American Industry Classification System (NAICS). A numerical system used in the United States to classify goods and services.

  This code is four (SIC) or six (NAICS) digits.

- Harmonized System (HS). The international method of classifying goods. This code can be up to 10 digits.

- Standard Industrial Trade Classification (SITC). A numerical code system developed by the United Nations to classify goods used in international trade. International organizations use this code.

  This code can be up to six digits.

Receivables Y/N
Select this option to indicate a customer.

User Code
Select this option to identify information that is pertinent to your business. No predefined definitions exist for this option.

Subledger Inactive Code
Select this option to indicate whether a specific subledger is inactive. Examples of inactive subledgers are jobs that are closed, employees who have been terminated, or assets that have been disposed. When this option is selected, the subledger is inactive.

Employee Y/N
Select this option to indicate whether this address number represents an employee. When this option is selected, the address number represents an employee.

Additional 2 Tab

Classification Code 01–05
Enter any codes used to classify an address book entity.

Ticker
Specify the stock ticker symbol for the company.

Stock Exchange Specify the exchange under which the company's stock is listed.

Year Started Specify the year in which the company became a customer.

Revenue Range Enter the company's revenue range.

Growth Rate Enter the customer's growth rate.

Number of Employees Enter the number of people employed by the customer or supplier.

DUNS Number Specify the Dun and Bradstreet identifier used to receive credit reports for companies.

Related Address Tab

Parent Number Enter the parent company's address book number. The system uses this number to associate a particular address with a parent company or location. Any value that you enter in this field updates the Address Organizational Structure Master table (F0150) for the blank structure type. This address number must exist in the Address Book Master table (F0101) for validation purposes. Examples of address book records that would have a parent number include:

- Subsidiaries with parent companies.
- Branches with a home office.
- Job sites with a general contractor.

1st Address Number Enter an alternate address number that has been entered in the Address Book system. You can use this field for any secondary business address that relates to the primary address, such as a salesperson, law firm, accountant, securities agent, or bonding agent. If you leave this field blank on an entry form, the system supplies the primary address from the Address Number field.

2nd Address Number Enter a second alternate address number that has been entered in the Address Book system.

3rd Address Number Enter a third alternate address number that has been entered in the Address Book system.

4th Address Number Enter a fourth alternate address number that has been entered in the Address Book system.

5th Address Number Enter a fifth alternate address number that has been entered in the Address Book system.

Factor/Special Payee Enter a number that identifies a special payment address for accounts payable. This number must exist in the Address Book Master table (F0101) for validation purposes. If you leave this field blank on an entry form, the system supplies the primary address from the Address Number field.

Cat Codes Tabs

Category Code Enter one of thirty reporting codes that you can assign to an address in the Address Book system. Use these codes to group address book records for reports, mailings, and so on. Category codes are user defined (system 01, types 01 through 30).

Viewing Partner General Information

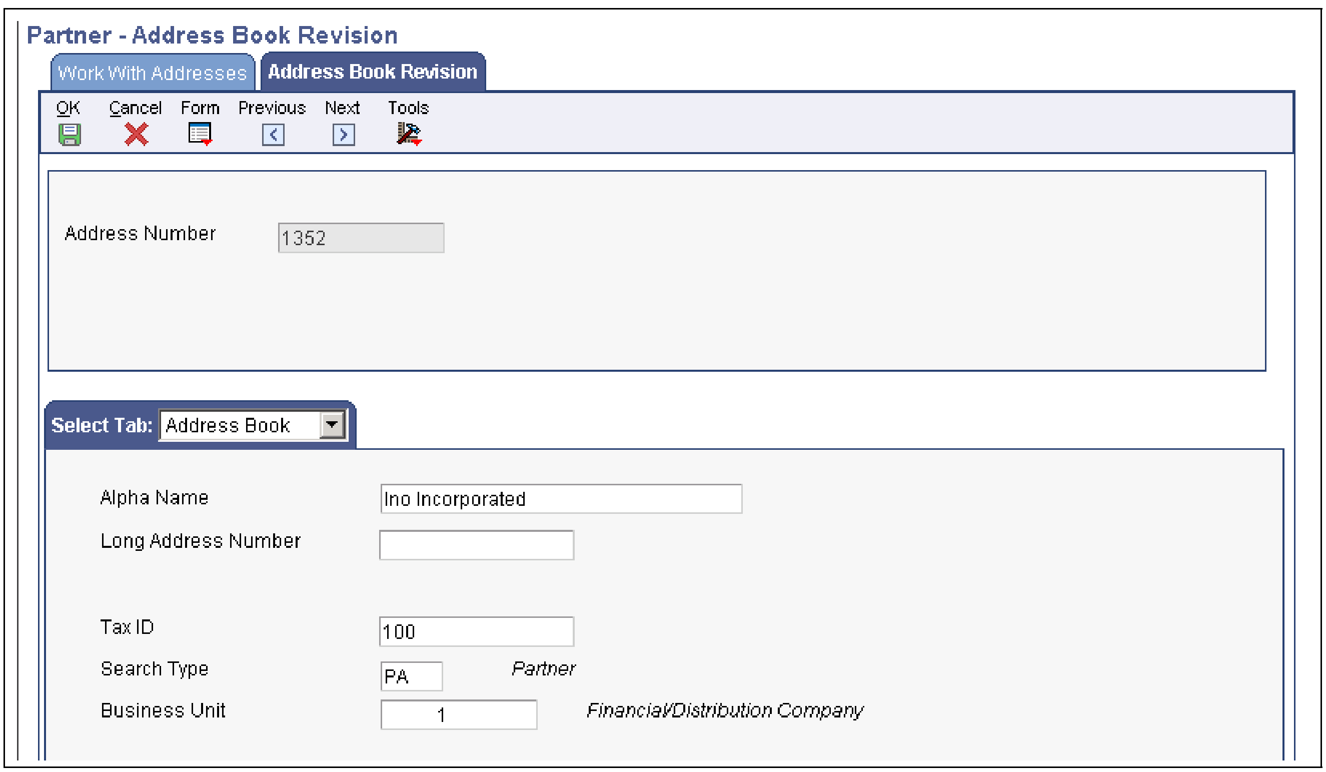
This section discusses how to view partner information.

Form Used to View Partner General Information

Form Name	Form ID	Navigation	Usage
Partner - Address Book Revision	W01012A	EnterpriseOne Menus, Customer Relationship Management, CRM Foundation, CRM Foundation Daily Processing (G90C01), Partner On Partner - Work With Addresses, find and select the record for the partner whose information you want to view.	Find and select a partner.

Viewing General Information

Access the Partner - Address Book Revision form.



Partner - Address Book Revision form

1. View partner information on the Address Book Revision tab.
2. View additional partner information by selecting an option from the Select Tab menu.
3. Click Next to view the next partner record, or Previous to view the previous record.

Viewing Partner Information for Employees, Customers, Leads, or Items

This section discusses how to view partner information pertaining to employees, customers, leads, or items.

Forms Used to View Partner Information for Employees, Customers, Leads, or Items

Form Name	Form ID	Navigation	Usage
Employee - Manage <employee name>	W90CA04RA	EnterpriseOne Menus, Customer Relationship Management, CRM Foundation, CRM Foundation Daily Processing (G90C01), Employee Or, EnterpriseOne Menus, Customer Relationship Management, Sales Force Automation, Periodic Sales Force Automation Processing (G90CA02), Employee Find and select an employee. On Employee - Manage <employee name>, click the Customer and Partner tab, and then click the Partner link	View information for currently assigned partners, and assign a partner to an employee.
Customer - Manage <customer name>	W90CA08RA	EnterpriseOne Menus, Customer Relationship Management, CRM Foundation, CRM Foundation Daily Processing (G90C01), Customer Or, EnterpriseOne Menus, Customer Relationship Management, Sales Force Automation, Daily Sales Force Automation Processing (G90CA01), Customer Find and select a customer. On Customer - Manage <customer name>, click the Contact and Partner tab, and then click the Partner link	View information for currently assigned partners, and assign a partner to a customer.

Page Name	Object Name	Navigation	Usage
Lead - Manage <lead name>	W90CB010L	EnterpriseOne Menus, Customer Relationship Management, Sales Force Automation, Daily Sales Force Automation Processing (G90CA01), Lead Find and select a lead. On Lead - Manage <lead name>, click the Contact and Partner tab, and then click the Partner link.	View information for currently assigned partners, and assign a partner to a lead.
Item - Manage <item name>	W90CA109A	EnterpriseOne Menus, Customer Relationship Management, CRM Foundation, CRM Foundation Daily Processing (G90C01), Item Inquiry Or, EnterpriseOne Menus, Customer Relationship Management, Sales Force Automation, Periodic Sales Force Automation Processing (G90CA02), Item Inquiry Find and select an item. On Item - Manage <item name>, click the Partner tab.	View information for currently assigned partners, and assign a partner to an item.

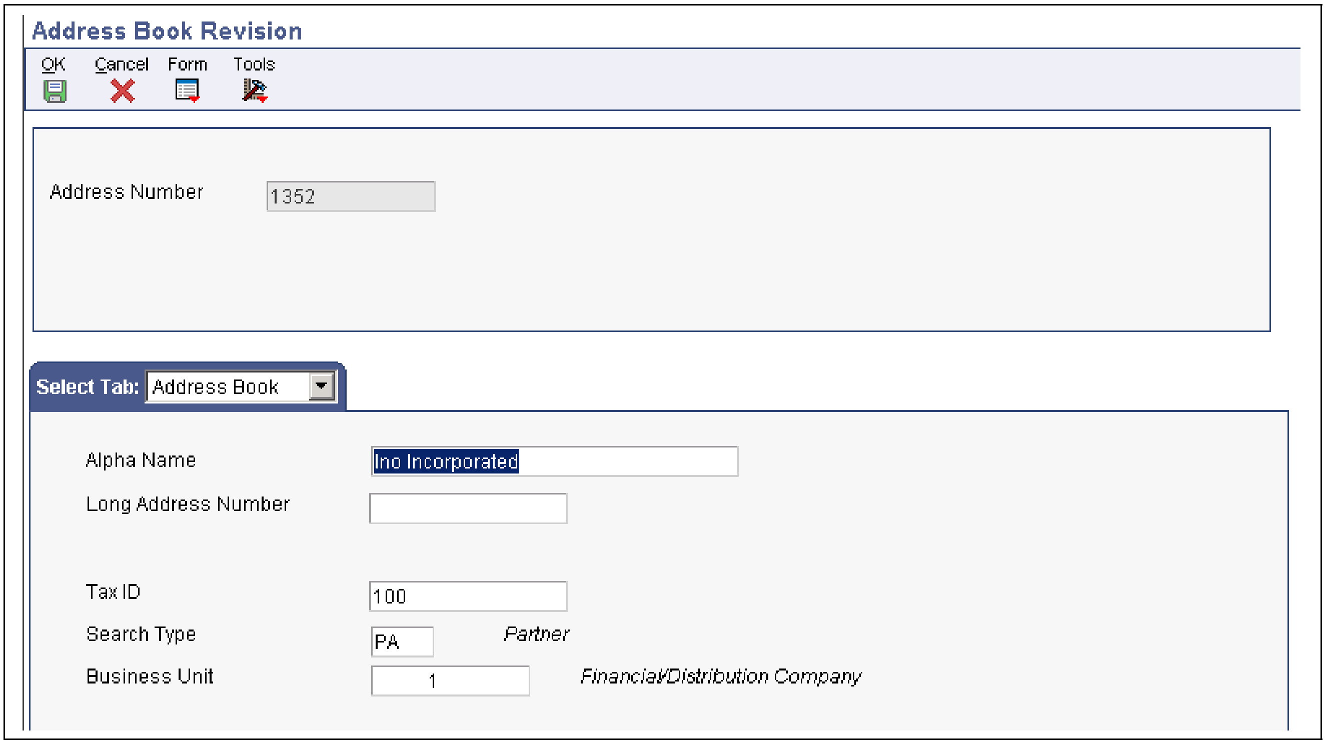
Page Name	Object Name	Navigation	Usage
Address Book Revision	W01012A	• On Employee - Manage <employee name>, find and select an employee; click the Customer and Partner tab; click the Partner link; click the partner's link under the grid's Partner Number column. • On Customer - Manage <customer name>, find and select a customer; click the Contact and Partner tab; click the Partner link; click the partner's link under the grid's Partner Number column. • On Lead - Manage <lead name>, find and select a lead; click the Contact and Partner tab; Partner link; click the partner's link under the grid's Partner Number column. • On Item - Manage <item name>, find and select an item; click the Partner tab; click the partner's link under the grid's Partner Number column.	Use this form to view, modify, or delete partner information.

Viewing Partner Information from the Employee, Customer, Lead, or Item Inquiry Applications

Access the appropriate form for employees, customer, leads, or items:

- Employee - Manage <employee name>, (Customer and Partner tab; Partner link).
- Customer - Manage <customer name>, (Contact and Partner tab; Partner link).
- Lead - Manage <lead name>, (Contact and Partner tab; Partner link).
- Item - Manage <item name>, (Partner tab).

1. Find and select the employee, customer, lead, or item whose partner information you want to view.
2. Under the Partner Number heading, click the link for the partner record you want to view for employees, customers, leads, or items.
3. Click Cancel to close the detail.
4. Repeat the process to view information for other partners who are assigned to the employee, customer, lead, or item.
5. When you are finished viewing partner information, click Close.



Address Book Revision form

Viewing Partner Information for Cases, Opportunities, or Activities

This section discusses how to view partner information pertaining to cases, opportunities, or activities.

Forms Used to View Partner Information for Cases, Opportunities, or Activities

Form Name	Form ID	Navigation	Usage
Opportunity - Manage <opportunity name>	W90CB020A	EnterpriseOne Menus, Customer Relationship Management, Sales Force Automation, Daily Sales Force Automation Processing (G90CA01), Opportunity	View the partner and partner contact currently assigned to the opportunity.

Page Name	Object Name	Navigation	Usage
Address Book Revision	W01012A	On Opportunity - Manage <opportunity name>, click the Partner link. Or, EnterpriseOne Menus, Customer Relationship Management, CRM Foundation, CRM Foundation Daily Processing (G90C01), Activity Find and select an activity. On Activity - Edit <activity name>, click the Partner link.	View or modify partner information.
Partner Search & Select	W90CA050A	On Opportunity - Manage <opportunity name>, click the visual assist at the Partner field.	Find and select a partner to associate to the opportunity.
Contact Manage	W90CA070B	EnterpriseOne Menus, Customer Relationship Management, CRM Foundation, CRM Foundation Daily Processing (G90C01), Activity Find and select an activity. On Activity - Edit <activity name>, click the Partner Contact link.	View or modify the partner contact.
Case Entry - Manage Case	W90CG501J	EnterpriseOne Menus, Service Management, Case Management, Daily Case Processing (G17132), Case Entry. Click the Additional Information tab.	View the partner and partner contact associated with a case.
Activity - Edit <activity name>	W01301B	EnterpriseOne Menus, Customer Relationship Management, Sales Force Automation, Daily Sales Force Automation Processing (G90CA01), Activity. On Search for Activities, find and select an activity	Find and select an activity.

Viewing Partner Information from the Case Management, Opportunity, or Activity Applications

Access the appropriate form for cases, opportunities, or activities:

- Case Entry - Manage Case

- Opportunity - Manage <opportunity name>
- Activity - Edit <activity name>

1. For opportunities or activities, click the Partner link to display the Address Book Revision form. For opportunities you can also click the Partner Contact link to display the assigned partner contacts.

   For cases, you can only view the currently assigned partner in the Partner field, and the partner contact in the Partner Contact field.
2. Click Cancel to close the Address Book Revision form.
3. Repeat the process to view information for other partners who are assigned to other cases, opportunities, or activities.
4. When you are finished viewing partner information, click Close.

Assigning and Removing Partners

This section provides an overview of assigning or removing a partner and discusses how to:

- Assign or remove a partner for employees, customers, leads, or items.
- Assign or remove a partner for cases, opportunities, or activities.
- Assign or remove a contact for cases or activities.
- Assign or remove a contact for opportunities.

Understanding Partner Assignment and Removal

You can associate a partner to an employee, customer, sales lead, item, case, opportunity, or activity. You can also remove a partner that was previously assigned. For cases, opportunities, and activities, you are limited to one partner and one contact. For employees, customers, leads and items, you can assign multiple partners and contacts.

For employees, customers, leads, and items, you create or remove partner associations on the same forms that you used to view partners who are currently assigned to the employee, customer, sales lead, or item. On these forms, click the Assign Partners and Remove buttons to assign or remove a partner for the currently selected employee, customer, sales lead, or item.

For cases, opportunities, and activities, you create the association using the visual assist for the Partner fields on the Case Management, Opportunity, and Activity forms.

Forms Used to Assign and Remove Partners

Form Name	Form ID	Navigation	Usage
Partner Search & Select	W90CA050A	• Click the visual assist for the Partner Number field on the Employee, Customer, Lead, or Item Inquiry forms (Partner tab). • CRM Foundation Daily Processing (G90C01), Employee Or, Periodic Sales Force Automation Processing (G90CA02), Employee Find and select an employee; click the Customer and Partner tab; click the Partner link; click the Partner Number field visual assist. • CRM Foundation Daily Processing (G90C01), Customer Or, Daily Sales Force Automation Processing (G90CA01), Customer Find and select a customer; click the Contact and Partner tab; click the Partner link; click the Partner Number field visual assist. • Daily Sales Force Automation Processing (G90CA01), Lead Find and select a lead; click the Contact and Partner tab; click the Partner link; click the Partner Number field visual assist. • CRM Foundation Daily Processing (G90C01), Item Inquiry Or, Periodic Sales Force Automation Processing (G90CA02), Item Inquiry Find and select an item; click the Partner tab; click the Partner Number field visual assist.	Find and select the partner to view or assign.

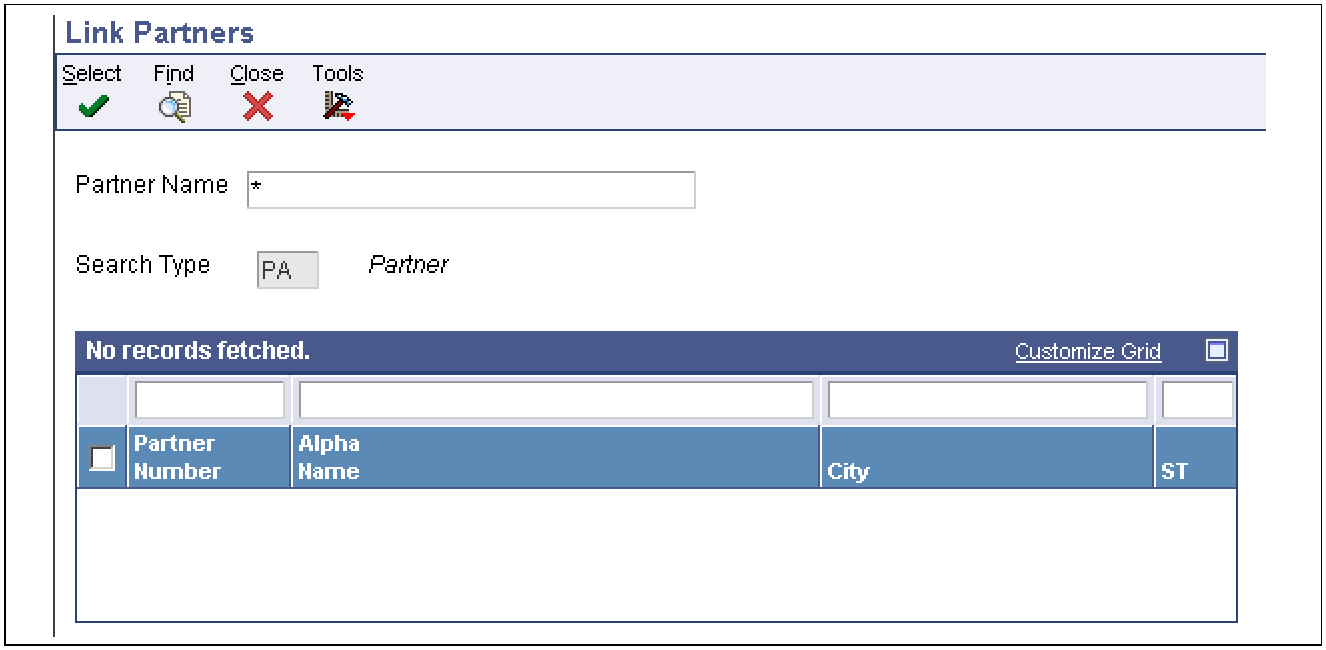
Page Name	Object Name	Navigation	Usage
Partner Contact Search & Select	W90CA050B	• EnterpriseOne Menus, Customer Relationship Management, Sales Force Automation, Daily Sales Force Automation Processing (G90CA01), Activity Specify an Activity Type (To-Do); find and select the Activity Type; click the Activity Details tab; click the Partner Contact field visual assist. • EnterpriseOne Menus, Customer Relationship Management, Service Management, Case Management, Daily Case Processing (G17132), Case Entry Find and select a case; click the Additional Information tab; click the Partner Contact field visual assist.	Find and select a partner contact.
Link Partners	W90CA050C	Click the Assign Partners button on the Employee, Customers, Item Inquiry, or Lead forms.	Assign a partner to the employee, customer, item, or lead.

Assigning or Removing a Partner for Employees, Customers, Leads, or Items

Access the appropriate form for employees, customer, leads, or items:

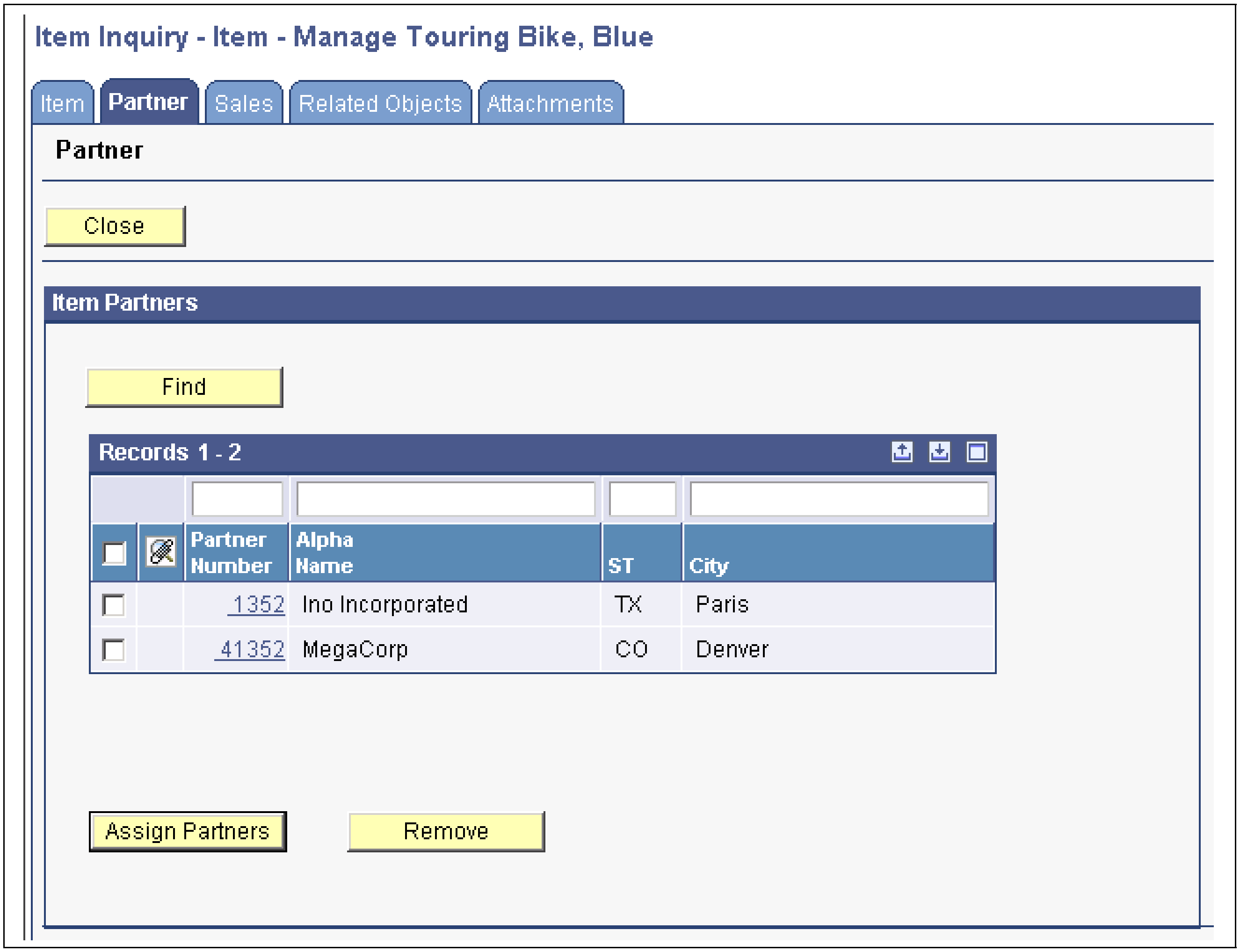
- Employee - Manage <employee name>, (Customer and Partner tab).
- Customer - Manage <customer name>, (Contact and Partner tab).
- Lead - Manage <lead name>, (Contact and Partner tab).
- Item - Manage <item name>, (Partner tab).

1. Click the Partner Number link
2. Click Assign Partners.
3. On the Link Partners form, find and select the partner that you want to assign.



Link Partners form

To remove a partner assignment, select the partners to remove and click Remove on the Employee, Customer, Lead, or Item Inquiry form.



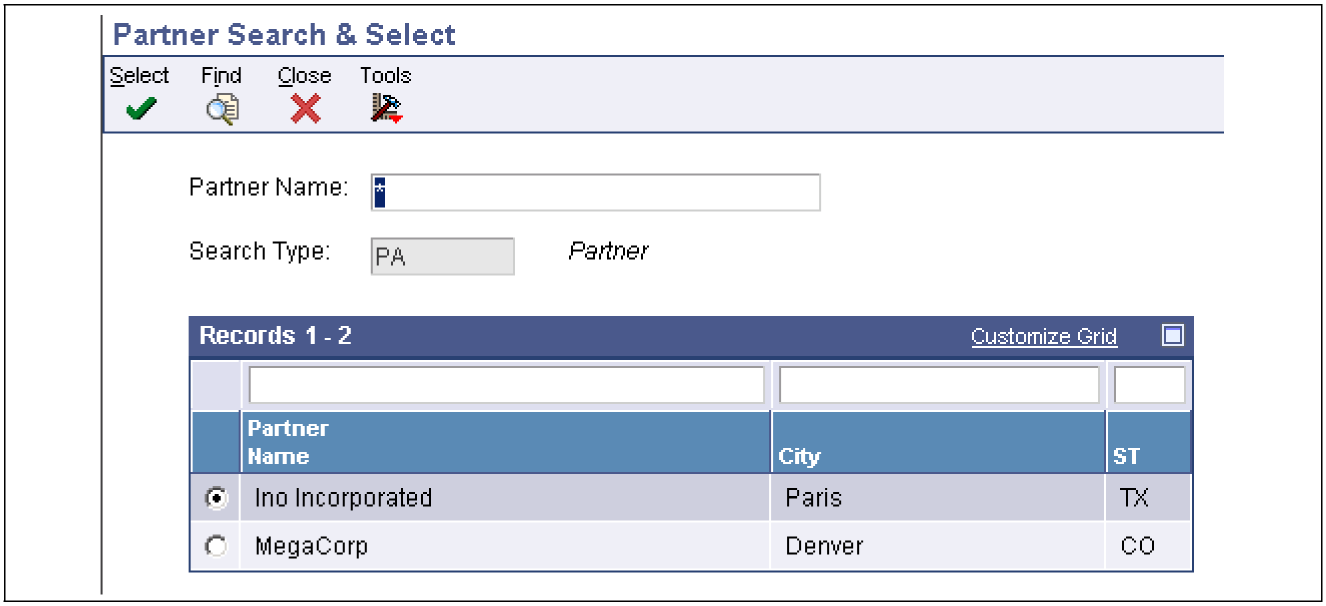
Assign or Remove Partner example

Assigning or Removing a Partner for Cases, Opportunities, or Activities

Access the appropriate form for cases, opportunities, or activities:

- Case - Manage <case name> (Additional Information tab)
- Opportunity - Manage <opportunity name>
- Activity - Edit <activity name>

1. Click the visual assist for the Partner field to display the Partner Search and Select form.
2. Find and select the partner to assign to the case, opportunity, or activity.
3. Click Close to exit the Partner Search and Select form.
4. To remove a partner who is assigned to a case, opportunity, or activity, clear the entry in the Partner field on the Case Entry, Opportunity, or Activity form.



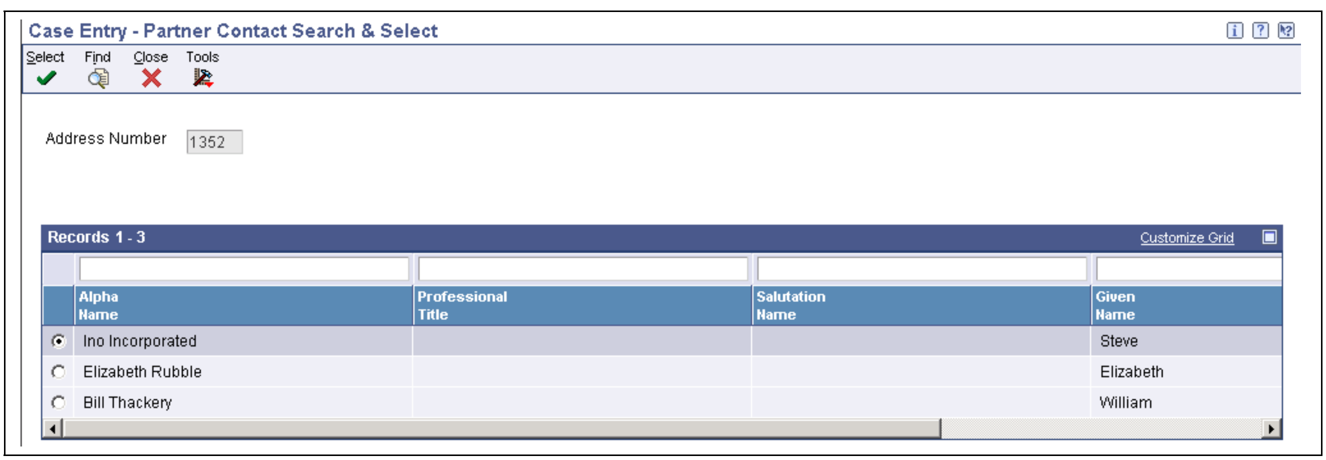
Partner Search and Select form

Assigning or Removing a Partner Contact for Cases or Activities

Access the appropriate form for cases or activities:

- Case - Manage <case name> (Additional Information tab)
- Activity - Edit <activity name>

1. Click the visual assist for the Contact field to display the Partner Contact Search and Select form.
2. Find and select the contact to assign to the case or activity.
3. Click Close to exit the Partner Contact Search and Select form.
4. To remove a partner contact who is assigned to a case or activity, clear the entry in the Contact field on the Case Entry or Activity form.



Partner Contact Search and Select form

Assigning or Removing a Partner Contact for Opportunities

Access the Opportunity - Manage <opportunity name> form.

1. If there are multiple contacts, the drop-down list next to the Contact field will be active.

   This is the Contact field on the same line as the Partner field, not the Contact field on the line with the Ship To or Sold To fields. Select the contact from the drop-down list the contact whose information you want to assign to the opportunity.
2. Click Save Changes.
3. To remove a partner contact who is assigned to an opportunity, select the Select One option from the Contact field list.

CHAPTER 8

Managing Contacts

This chapter provides an overview of managing contact information and discusses how to:

- View and modify contact detail information.
- View and modify contact activity information.
- View and modify contact sales information.
- View and modify contact service information.
- View and modify attachments for contacts.
- Enter new contact information.

Understanding the Contact Application

The Contact application provides a way to view and modify existing contact information, and to create new contacts. Contacts are used in EnterpriseOne Sales Force Automation and Service applications. To facilitate integration, from the Contact application you can access contact information that pertains to Sales Force Automation or Service.

The Contact application is also an entry point for the Email Merge and Mail Merge features. Before you can use either of these features you must create at least one contact.

See Chapter 10, “Using Email and Mail Merge,” page 159.

The Contact form has these tabs that enable you to view or modify contact information:

- Contact: View or modify the contact’s detail information, address and phone, and related people.
- Activities: View or modify activity and email information for the contact.
- Sales: View or modify opportunity, pipeline, quote, or sales order information for the contact.
- Service: View or modify information about cases associated with the contact.
- Attachments: View, modify, or enter attachments for the contact.

Some of the tabs have links that let you view or modify related information. For example, the Sales tab has links that let you view or modify pipeline, quote, and sales order information.

Many forms have grids that let you locate and select specific records which you can view or modify using different applications. For example, on the Sales tab you can locate an opportunity and view or modify its information through the Opportunity application. When you are finished viewing or modifying information within that application, you return to the Contact application.

Viewing and Modifying Contact Detail Information

This section provides an overview of viewing and modifying contact detail information and discusses how to:

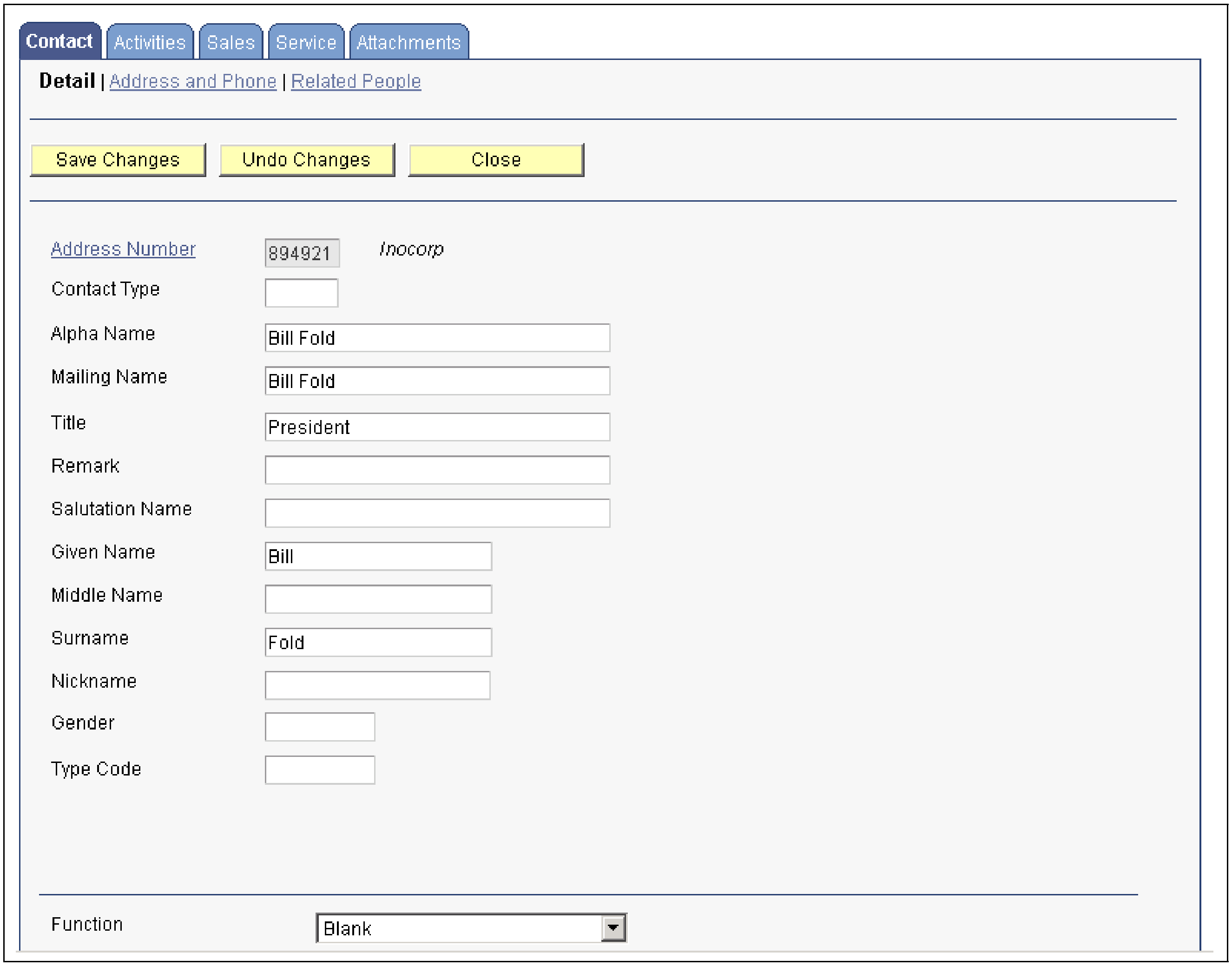
- View or modify contact detail information.
- View or modify contact address information.
- View or modify contact telephone and electronic address information.
- View or modify contact related people.

Forms Used to View or Modify Contact Detail Information

Form Name	Form ID	Navigation	Usage
Contact - Search For Contacts	W90CA070C	EnterpriseOne Menus, Customer Relationship Management, Sales Force Automation, Daily Sales Force Automation Processing (G90CA01), Contact Also EnterpriseOne Menus, Customer Relationship Management, CRM Foundation, Daily Processing (JDE004457), Contact. Also EnterpriseOne Menus, Support, Daily Support Processing (G90CE01), Contact	Find and select the contact whose information you want to view.
Contact - Manage <contact name>	W90CA070B	Click the link for the contact.	View contact information.
Contact - Add Related Person	W90CA073B	On the Contact - Manage <contact name> form's Contact tab, click Related People and then click Add.	Add a related person to the contact.

Viewing or Modifying Contact Details

Access the Contact - Manage <contact name> form.



Contact - Manage <contact name> form

1. View, enter, or modify information in the fields on the Contact tab.
2. Click a link or tab as needed to view or modify ancillary information.
3. If you make any changes to contact detail information, click Save Changes or Undo Changes.
4. When you are finished viewing or modifying contact information, click Close.

Contact Tab (Detail)

Contact Type

Enter the user-defined code (system 01, type CT) that describes the contact. For example, you might set up codes to describe a contact as a decision maker, an influencer, a recommender, a competitor, and so on.

Alpha Name

Enter up to 40 alphabetic characters for the contact name. You can enter dashes, commas, and other special characters, but the system does not use them when you search for a name.

Mailing Name

Enter a mailing name which represents the company or person to whom billing or correspondence is addressed.

Title

Enter the professional title of the contact as it appears in the Who's Who table.

Remark Enter a 40-character remark for the contact, such as any supplemental information pertaining to the contact.

Salutation Name Enter the salutation you would use to address the contact in written correspondence. This field is informational only and not used in any reports.

Given Name Enter the contact's first name. This field is informational only and not used in any reports.

Middle Name Enter the contact's middle name or initial. This field is informational only and not used in any reports.

Surname Enter the contact's last name. This field is informational only and not used in any reports.

Nickname Enter the contact's nickname.

Gender Enter the code that corresponds to the contact's gender. Values are:

1: Male

2: Female

3: Unknown

Blank: Unspecified

Type Code Enter the user-defined code (system 01, type W0) that identifies the contact's Who's Who entry, such as Attention Name, Emergency Contact, or 1099 legal name.

Function Enter the user-defined code (system 01, type FC) that indicates the function the contact serves in the company, such as consultant, manager, or staff.

Department Enter the department in which the contact works.

Preferred Contact Method Enter the user-defined code (system 01, type CQ) that indicates the contact's preferred contact method, such as email, phone, or pager.

Reports To Enter the name of the person to whom the contact reports. This field is informational only and not used in any reports.

Category Codes 001-020 Enter 1 to 20 reporting codes that are assigned to names in the Who's Who list. You can use these codes to identify names for special mailing lists, phone directories, and so on.

Viewing or Modifying Contact Address Information

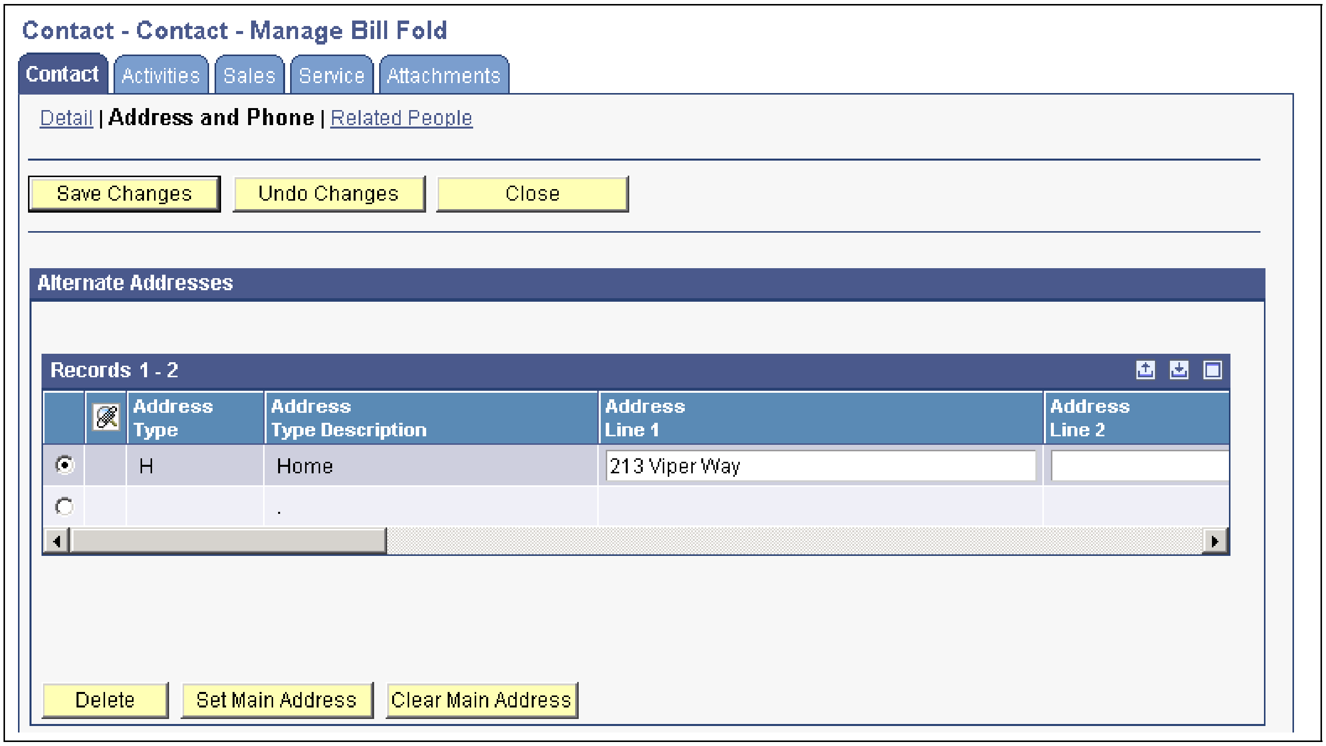
Access the Contact - Manage <contact name> form.

1. On the Contact tab, click the Address and Phone link.
2. To modify an existing address record, select the record in the Alternate Addresses grid and then make changes in the grid fields.
3. To delete an address record, select the record in the Alternate Addresses grid and then click Delete.
4. To add address information, select a blank line in the grid and enter address information in the grid fields.
5. If there is more than one address for the contact, you can specify the main address to use by clicking the Set Main Address button.

The address you selected is indicated in the Main Address Flag field.

6. To change the main address status, select a different address and click Set Main Address.

   The old main address is deselected, and the new main address is selected. To clear the main address setting without specifying a main address, click the Clear Main Address button.



Contact - Manage <contact name> form: Contact tab: Address and Phone link (top)

Contact Tab (Address and Phone)

Address Type — Enter the user-defined code (system 01, type AT) that identifies the type of address, such as a home address or an office address.

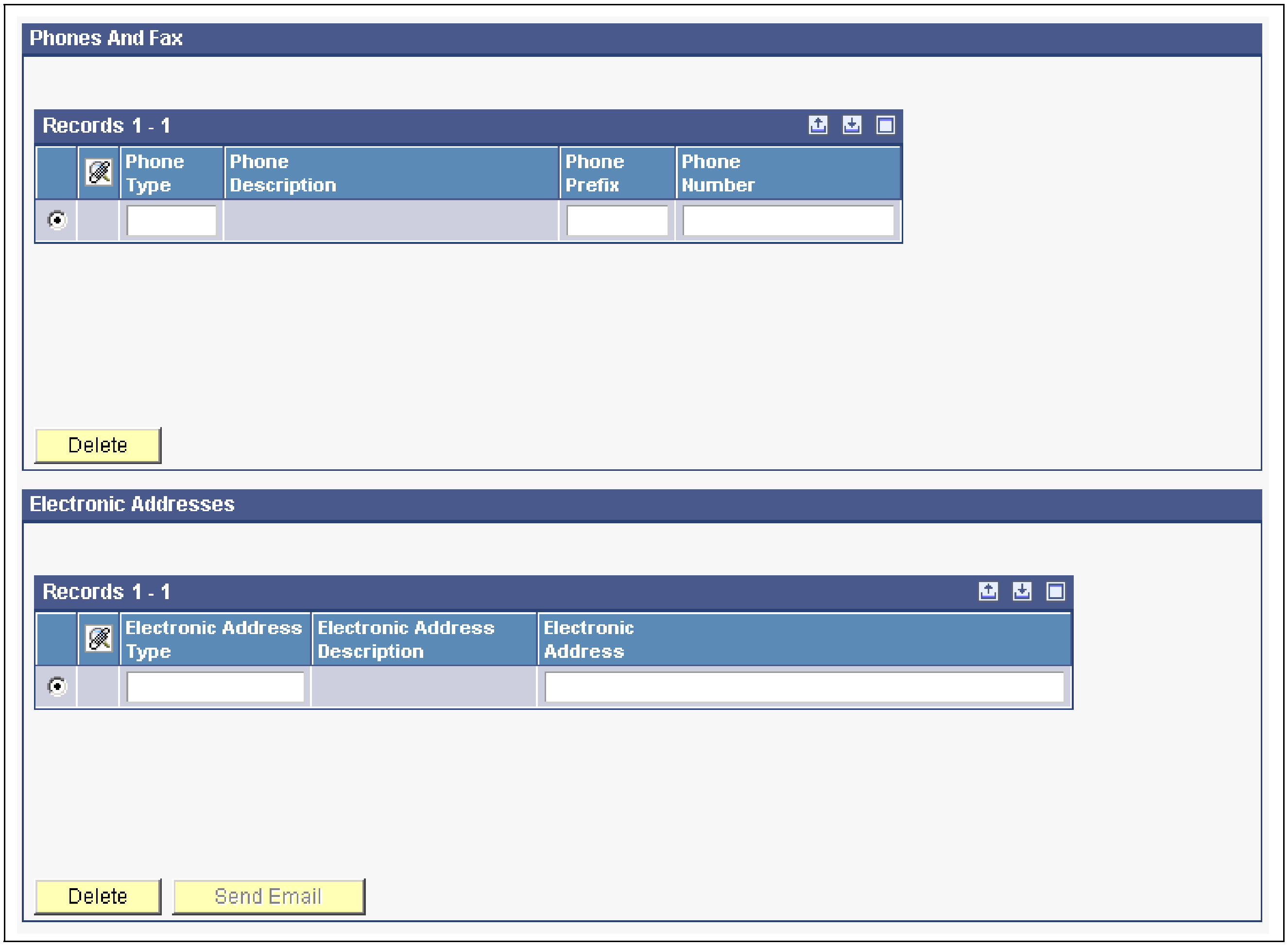
Begin Date — Enter the date on which the contact's address becomes active.

Viewing or Modifying Contact Phone and Electronic Address Information

Access the Contact - Manage <contact name> form and click the Address and Phone link.

1. To modify an existing telephone or fax record, select the record in the Phones and Fax grid and then make changes in the grid fields.
2. To delete a telephone or fax entry, select the record in the Phones and Fax grid and then click Delete.
3. To enter a new enter telephone or fax record, select a blank row in the grid and then enter the phone or fax information in the grid fields.
4. To modify an existing electronic address record, select the record in the Electronic Addresses grid and then make changes in the grid fields.
5. To delete an electronic address record, select the record in the Electronic Addresses grid and then click Delete.

6. To enter a new electronic address record, select a blank row in the grid and then enter the electronic address information in the grid fields.
7. If you have previously created an email message for the contact, you can click Send Email to send the email to electronic addresses you just added.



Contact - Manage <contact name> form: Contact tab: Address and Phone link (bottom)

Contact Tab (Address and Phone)

Phone Type Enter the user-defined code (system 01, type PH) that indicates either the telephone's location or use, such as a business phone or home phone.

Phone Prefix Enter the first telephone number's first segment, such as the three-digit area code used in United States.

Phone Number Enter the contact's telephone number digits, excluding the phone prefix or special characters such as hyphens or periods. When you search for an address using a phone number, you must enter the number exactly as it is set up in the Address Book system, including any special characters.

Electronic Address Type Enter the user-defined code (system 01, type ET) that indicates the type of electronic address, such as an email address or internet address.

Electronic Address — Enter the email address or Uniform Resource Locator (URL) for the contact. Note: If you entered Type W - Internal email (work center) for the Electronic Address Type field, the Electronic Address field must be blank.

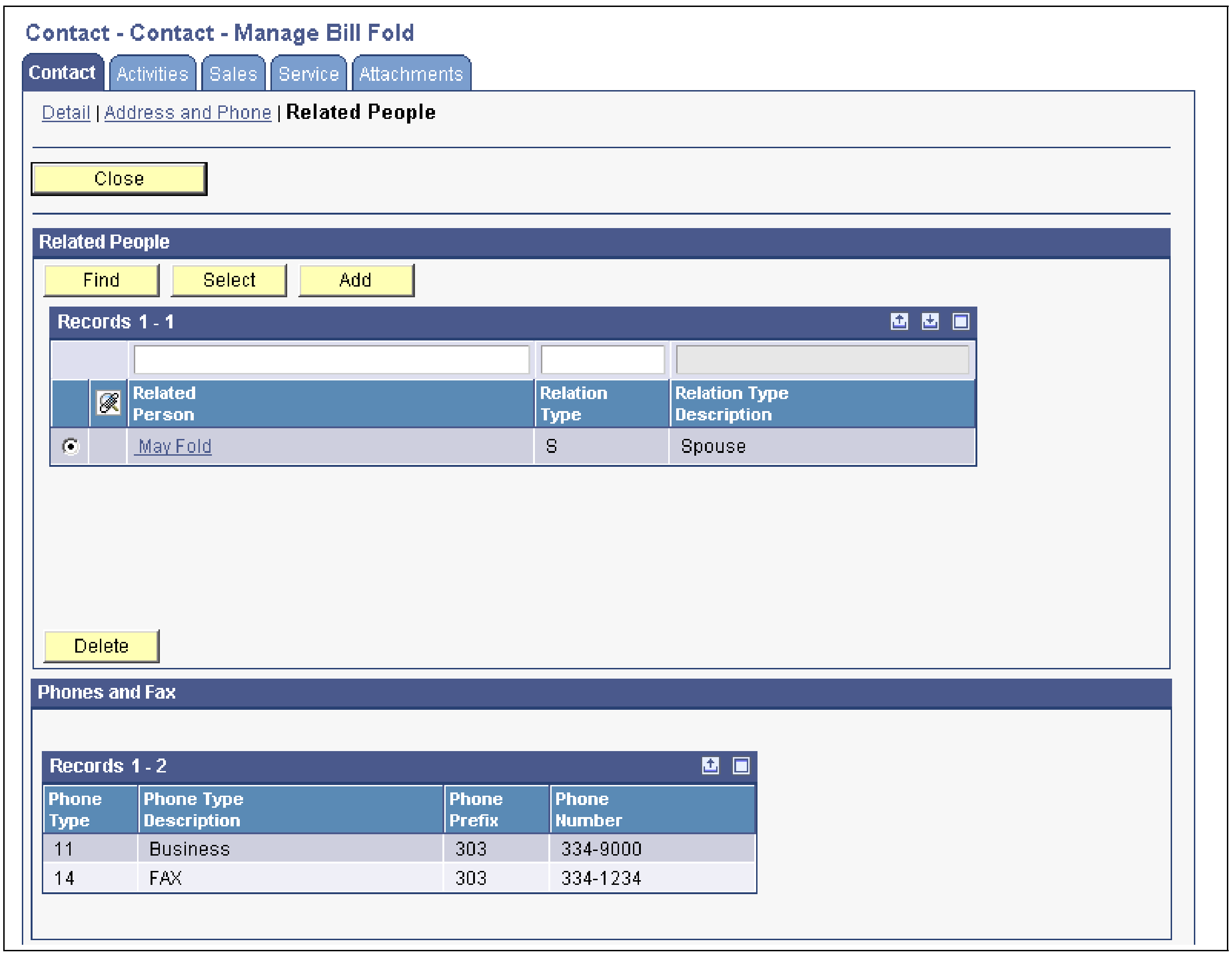
Viewing or Modifying Contact Related People

Access the Contact - Manage <contact name> form's Contact tab, and then click the Related People link.

1. To modify an existing related person record, select the record in the Related People grid and then make changes in the grid fields.

   Alternatively, you can click a record's link to modify information, but if you are using the Mobile Client feature you will not be able to modify server synchronization information.

2. To delete a related person record, select the record in the Related People grid and then click Delete.
3. To modify phone information for the related person, click the record and make changes on the Contact - Manage Related Person form.
4. To add a related person, click Add and then enter related person information on the Contact - Add Related Person form.



Contact - Manage <contact name> form: Contact tab: Related People link

Contact Tab (Related People)

Related Person

Enter the name of the person in the Related Person table (F01112), which is associated with the Who's Who record.

Relation Type

Enter the user-defined code (system 01, type RT) that indicates the relationship between the contact and the person entered in the Related Person field, such as administrative assistant, child, or project lead.

Relation Type Description

Enter a brief description of the relationship type entered in the Relation Type field.

Synchronization Status

Enter the user-defined code that indicates the post synchronization validation status of the record. Values are:

00: Success (Blank)

01: The record is pending post-synchronization Add validation on the server (PVA).

02: The record is pending post-synchronization Change validation on the server (PVC).

03: The record is in error from the post-synchronization Add validation on the server (ERRA).

04: The record is in error from the post-synchronization Change validation on the server (ERRC).

05: The associated F0101 record is in error (ERRP).

06: The record is pending post-synchronization Add validation on the server, and the associated F0101 record is in error (ERRPA).

07: The record is pending post-synchronization Change validation on the server, and the associated F0101 record is in error (ERRPC).

Server Status

Enter the user-defined code that indicates the record's server synchronization status. Values are:

00: The record has been changed on the Server or has been processed by post synchronization validation on the Server.

01: The record has been changed on the Disconnected Client.

02: The record has been changed on the Disconnected Client and has been synchronized to the Server. This value is set only on Disconnected Client and any records with a value of 2 cannot be changed.

Phone Type

Enter the user-defined code (system 01, type PH) that indicates either the telephone's location or use, such as a business phone or home phone.

Phone Prefix

Enter the telephone number's first segment, such as the three-digit area code used in United States.

Phone Number

Enter the related person's telephone number digits, excluding the phone prefix or special characters such as hyphens or periods. When you search for an address using a phone number, you must enter the number exactly as it is set up in the Address Book system, including any special characters.

Viewing and Modifying Contact Activity Information

This section provides an overview of viewing and modifying contact activity information and discusses how to:

- View or modify contact activities.
- Add a new activity for the contact.
- Link the activity to an action plan.
- View or modify contact email.
- View or modify contact interactions.

Understanding Contact Activity Information

The fields, grids, and links on the Activity tab enable you to view or modify activities related to the contact. You can also add a new activity by accessing the Activities application.

Similarly, you can access the Email application to view or modify email messages that were created as activities for the contact. (*Only* the email messages that were created as an activity for the contact are shown on the Activities tab.)

The Activities tab also enables you to link a selected activity with an action plan.

Forms Used to View and Modify Activity Information

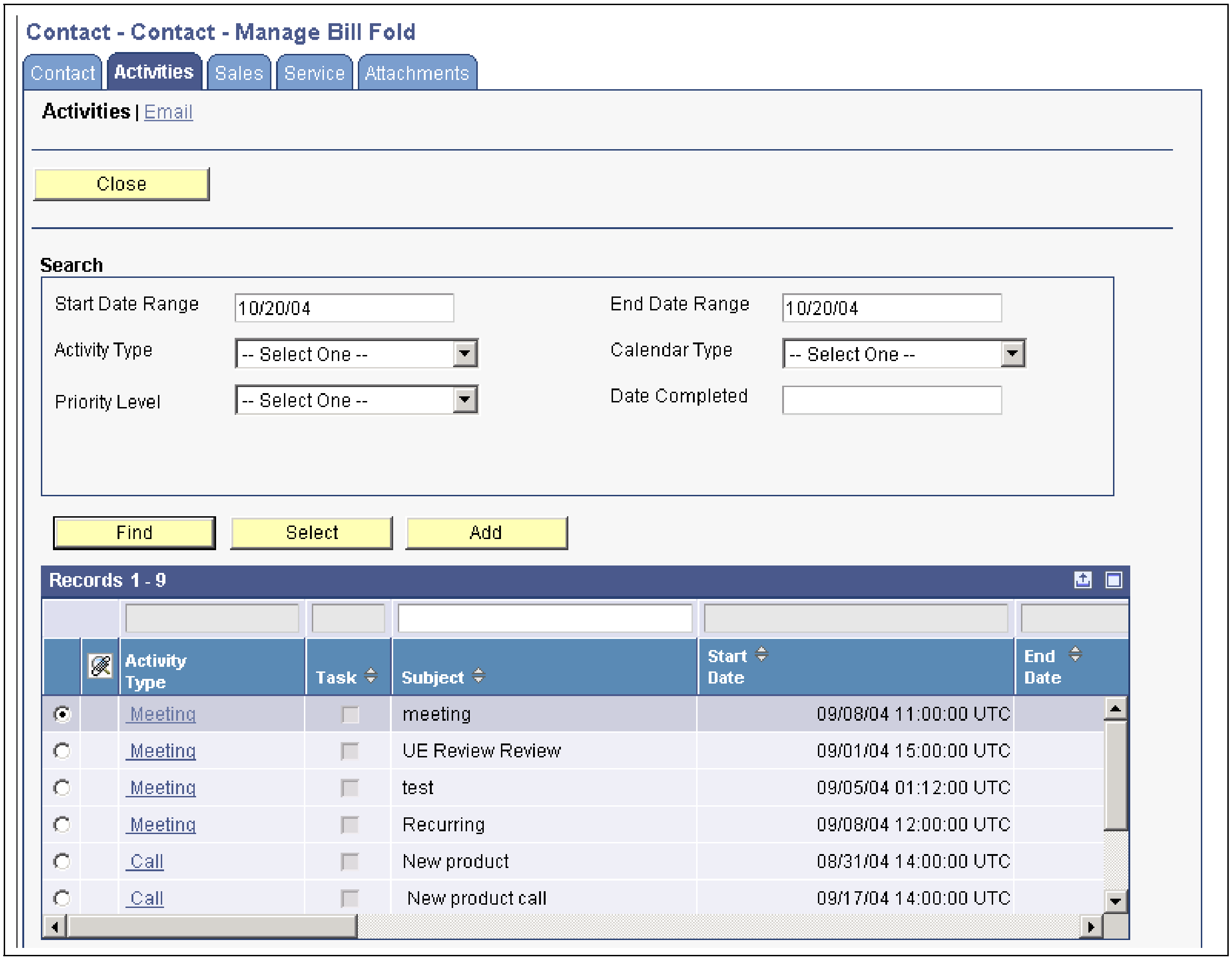
Form Name	Form ID	Navigation	Usage
Contact - Manage <contact name> Activities tab	W90CA07AA	Contact - Manage <contact name>, click the Activities tab.	Find and select the activity you want to view or modify.
Activity - Edit	W01301B	Select an activity record on Contact - Manage <contact name>.	View or modify activity information.
Add Activity	W01301B	On the Contact - Manage <contact name> form's Activities tab, click Add.	Add a new activity for the contact.
Contact - Manage <contact name> Activities tab (Email link)	W90CA07EA	Click Email on the Activities tab.	View email information related to the contact.
Action Plan Search and Select	W01401A	On the Contact - Manage <contact name> form's Activities tab, click Link Action Plan.	Find and select the action plan to which you want to link the activity.

Viewing or Modifying Contact Activities

Access the Contact - Manage <contact name> form (Activities tab).

1. If necessary, use the fields in the Search area of the form to limit search results. At a minimum you may want to specify the activity type before searching.

2. When you locate the activity record whose information you want to view or modify, select the record and click Select. (Alternatively, you can click the record's link under the Activity Type column heading.)
3. On Activity - Edit, view or modify the activity. At this point you are in the Activities application.
4. Click Save and Close or Cancel to return to the Contact - Contact - Manage <contact name> form.



Contact - Manage <contact name> form: Activities tab

Activities Tab

Start Date Range Enter the beginning date for the date range within which the activity occurs.

End Date Range Enter the ending date for the date range within which the activity occurs.

Activity Type Enter the user-defined code that defines the type of activity.

Calendar Type Enter the user-defined code that defines the type of calendar, such as personal calendar, customer calendar, CRM calendar, and so on.

Priority Level Enter the user-defined code that indicates the activity's level of importance or commitment. Values are:

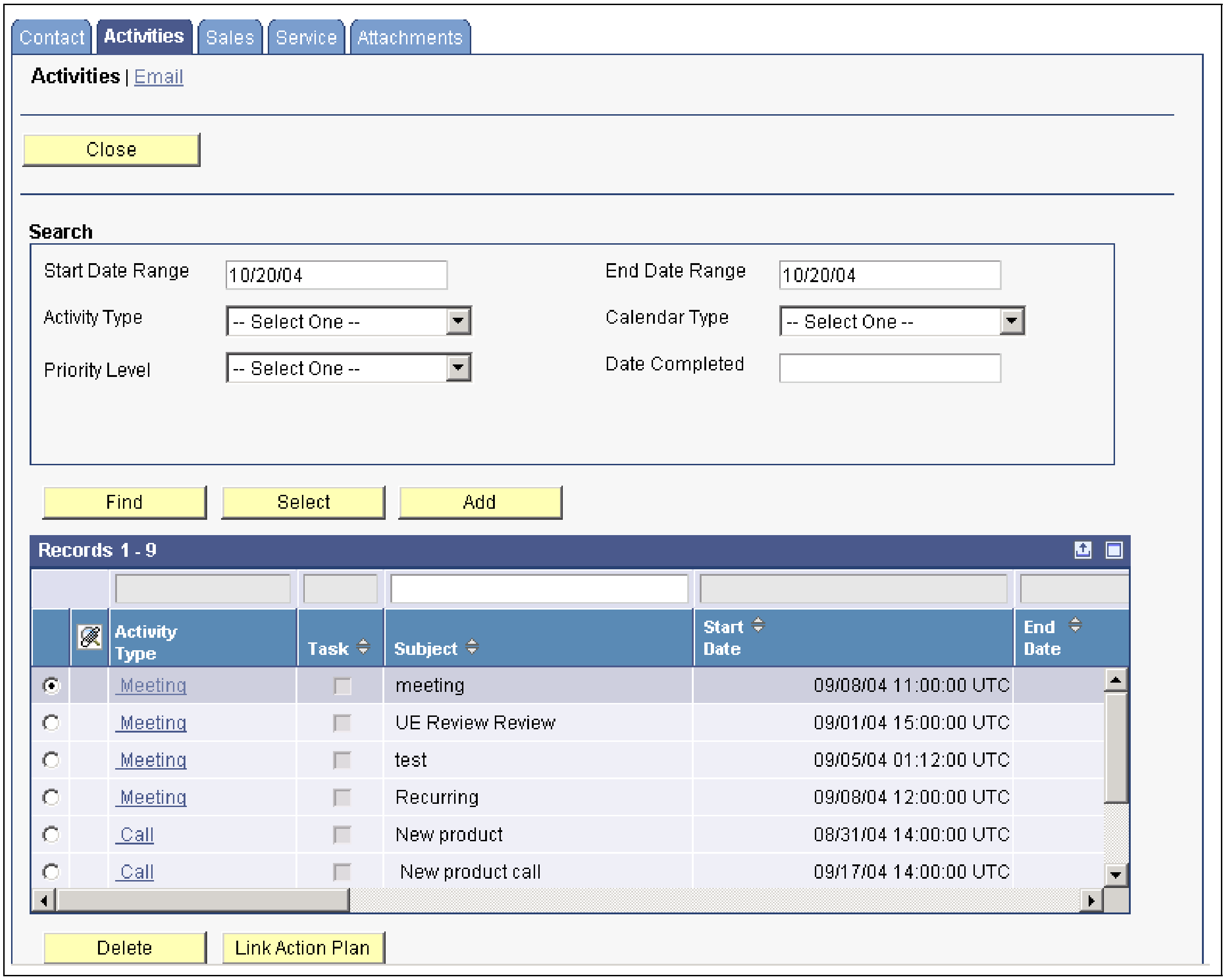
1: High

2: Medium

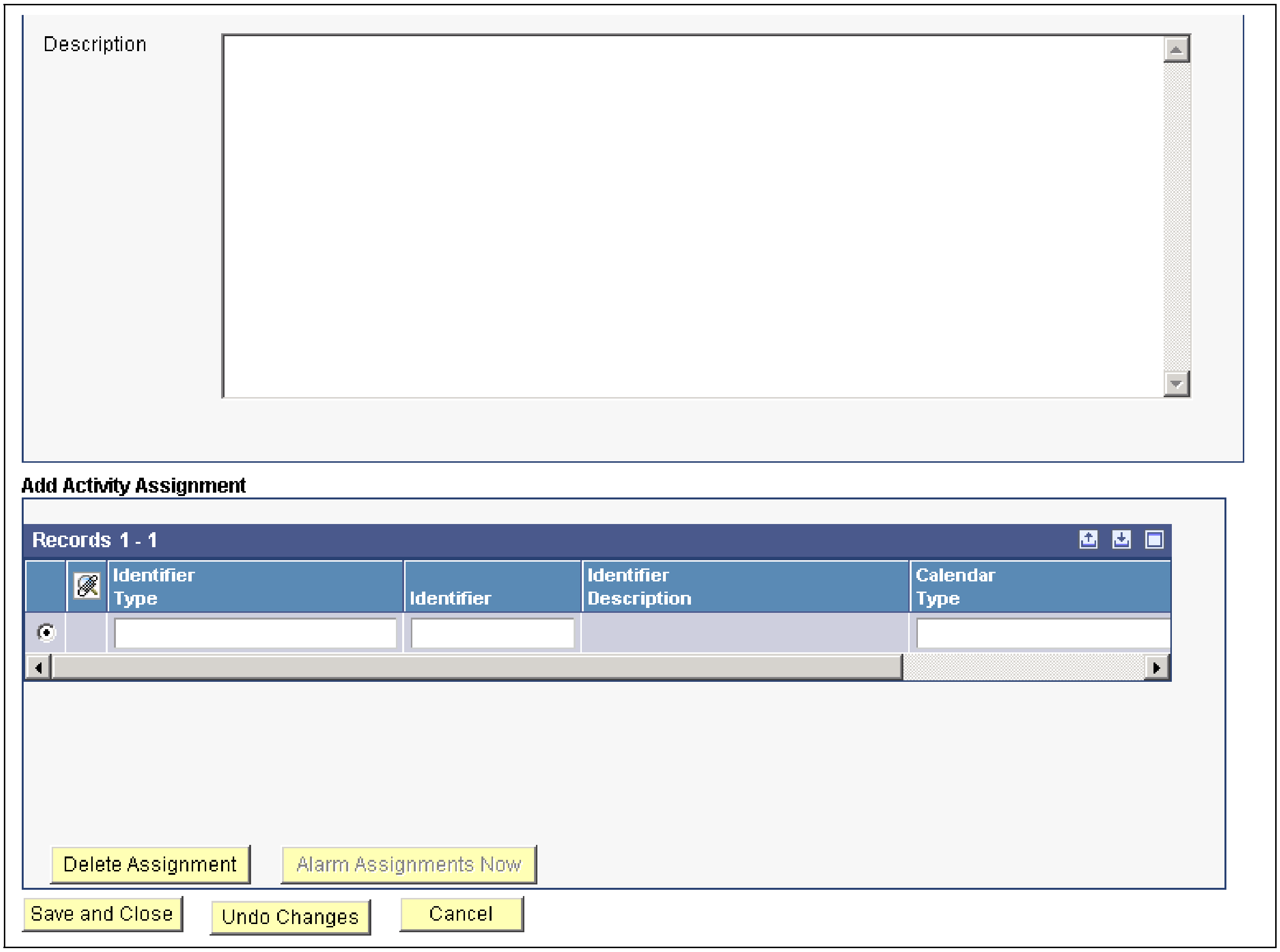
	3: Low
Date Completed	Enter the UTC time and date when the activity was completed.
Subject	Enter a subject for the activity that appears in daily, weekly, or monthly calendar views.

Adding a New Activity for the Contact

To add a new activity for a contact, access the Add Activity form. This form is part of the Activities application, but after you create the activity it is associated with the contact.



Contact - Manage <contact name> form: Add Activity form (1 of 2)

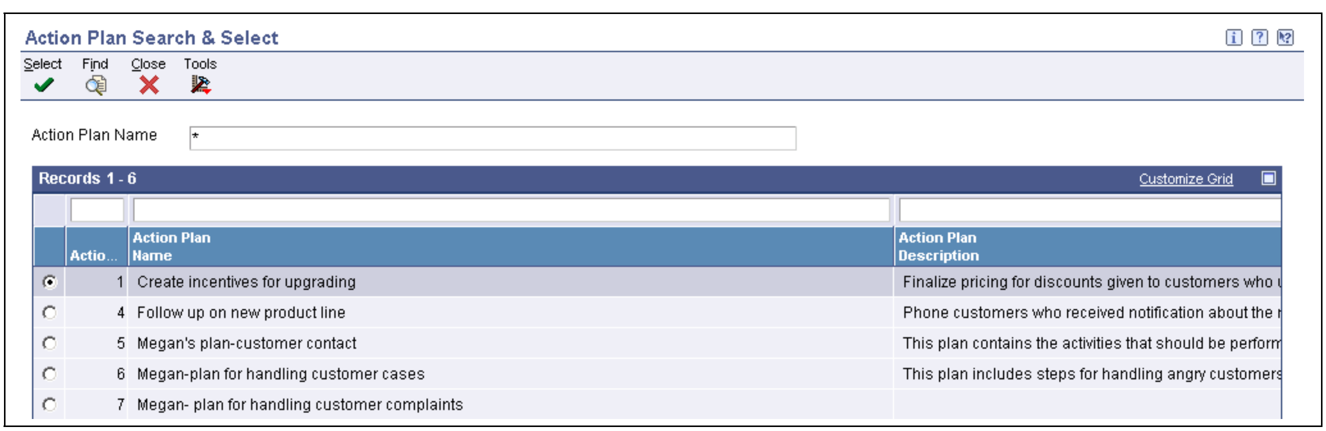


Contact - Manage <contact name> form: Add Activity form (2 of 2)

Linking the Activity to an Action Plan

Access the Contact - Manage <contact name> form and click the Activities tab.

1. Find and select in the grid the activity you want to link to an action plan, and then click Link Action Plan.
2. On the Action Plan Search and Select form, find and select in the grid the action plans to which you want to link the activity, and then click Select.

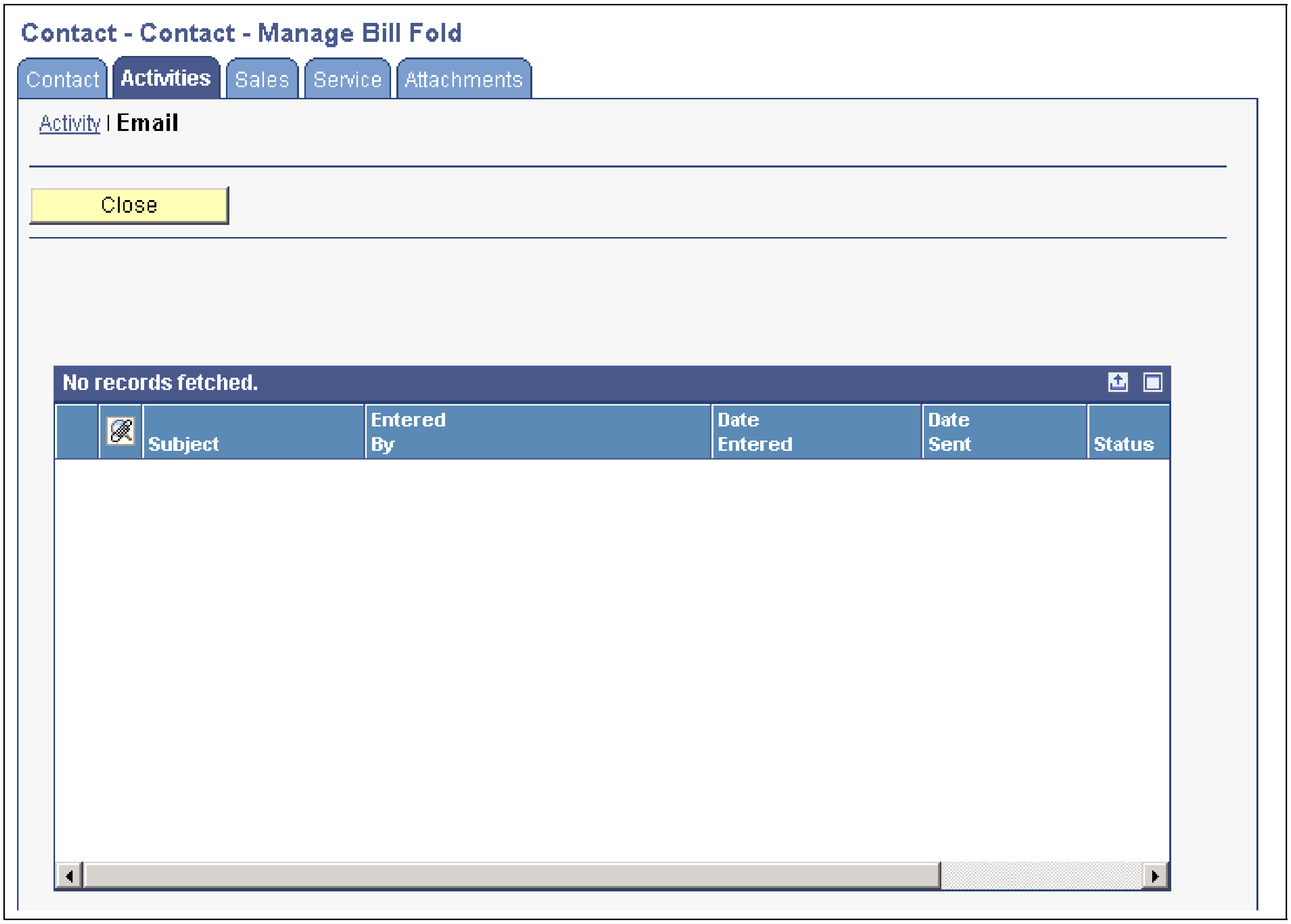


Action Plan Search & Select form

Viewing or Modifying Contact Email

Access the Contact - Manage <contact name> form's Activities tab, and then click the Email link.

1. To select the email message you want to view or modify, click the particular email's link under the Subject column.
2. On Email - Manage <email name>, view or modify the email as needed.
3. When you are finished viewing or modifying, save or undo any changes, and then send the email or close.



Contact - Manage <contact name> form: Activities tab: Email link

Viewing or Modifying Contact Interactions

The Contact application is integrated with a third-party interaction product from Apropos Technologies, Inc. which helps you manage contact information. The integrated solution provides a foundation of predefined database queries, screen pops, and other integration points that reduce the cost and development time of customer-specific implementations.

When you click the Interactions link on the Contact - Manage <contact name> form's Activities tab, a separate browser window opens containing the Apropos interaction application.

See The Apropos Website at www.apropos.com for more information about the integrated interaction product.

Viewing and Modifying Contact Sales Information

This section provides an overview of viewing and modifying contact sales information and discusses how to:

- View or modify opportunities.
- Add an opportunity to the contact.
- View the pipeline.
- View or modify quotes or sales orders.
- Add a quote or sales order quote to the contact.

Understanding Contact Sales Information

The fields and links on the Contact - Manage <contact name> form's Sales tab enable you to view or modify sales opportunity, pipeline, quote, or sales order information. You can also add a new opportunity, quote, or sales order to the contact.

When you modify or add an opportunity, quote, or sales order, you are accessing the Opportunity, Quote, and Sales Order applications. When you are finished, you return to the Contact application.

Forms Used to View and Modify Sales Information

Form Name	Form ID	Navigation	Usage
Contact - Manage <contact name> Sales tab.	W90CA07OA	On Contact - Manage <contact name>, click the Sales tab.	Find and select the opportunity you want to view or modify.
Opportunity - Manage <opportunity name>	W90CB020A	Select an opportunity on Contact - Manage <opportunity name>	View or modify opportunity information.
Opportunity - Manage <opportunity name> (Pipeline)	W90CA07PA	On the Contact - Manage <contact name> form's Sales tab, click Pipeline.	View pipeline information.
Opportunity - Manage <opportunity name> (Quote)	W90CA07QA	On the Contact - Manage <contact name> form's Sales tab, click Quote.	Find and select the quote you want to view or modify.
Opportunity - Manage <opportunity name> (Sales Order)	W90CA07SA	On the Contact - Manage <contact name> form's Sales tab, click Sales Order.	Find and select the sales order you want to view or modify.
Contact - Add Opportunity	W90CB020C	On the Contact - Manage <contact name> form's Sales tab (Opportunity), click Add.	Add a new opportunity for the contact.
Manage Existing Order	W42101C	Select a quote or sales order on the Contact - Manage <contact name> form's Sales tab (Quote or Sales Order link)	View or modify quote or sales order information.
Contact - Enter New Order	W42101D	Click the Quote or Sales Order link on the Contact - Manage <contact name> form's Sales tab, and then click Add.	Add a new quote or sales order for the contact.

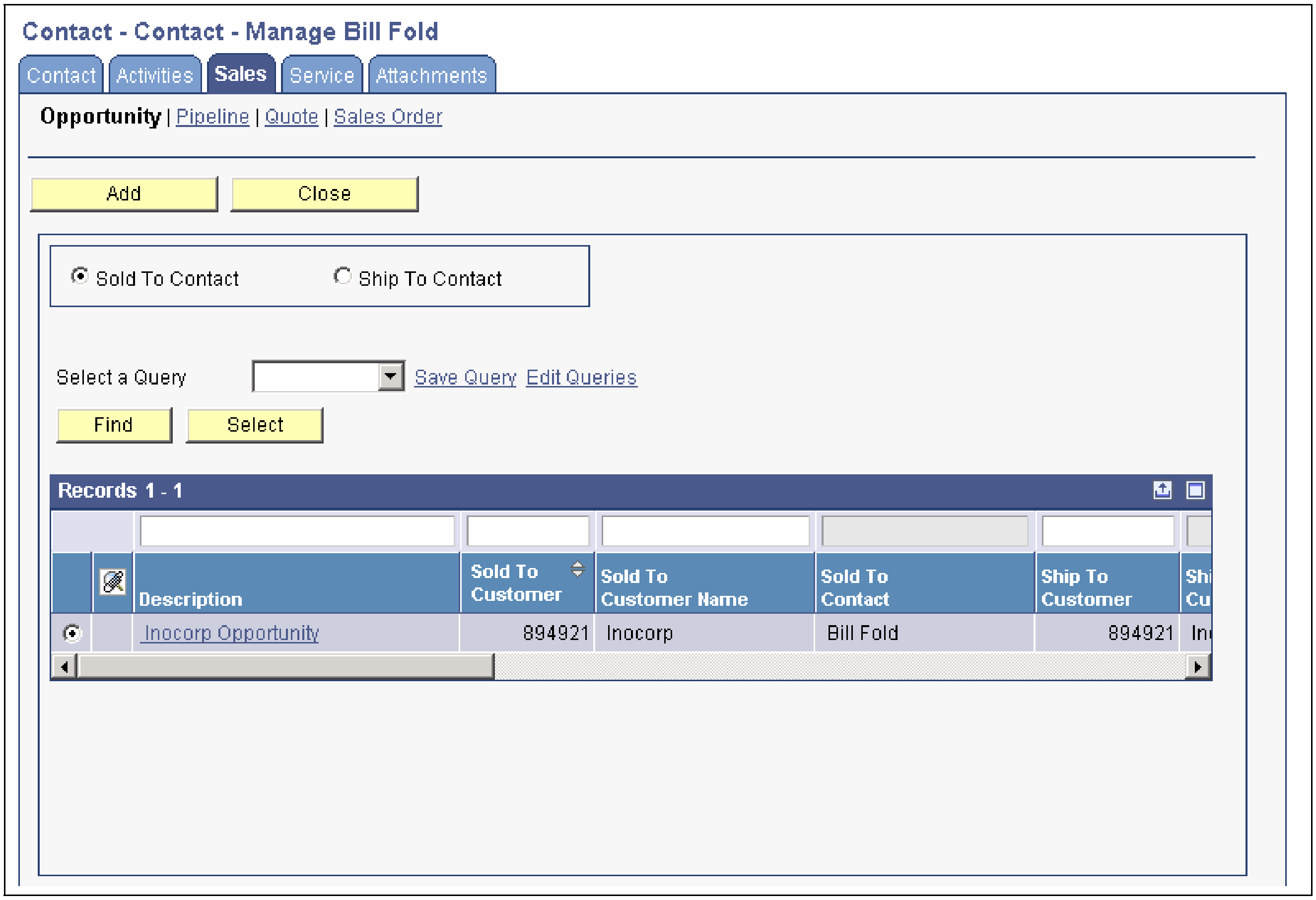
Viewing or Modifying Opportunities

Access the Contact - Manage <contact name> form's Sales tab.

1. Find and select in the grid the opportunity you want to view or modify.

   Alternatively, you can display the opportunity record by clicking the opportunity's link under the Description column heading.

2. On Opportunity - Manage <opportunity name>, view or modify the opportunity information.
3. If you are ready to convert the opportunity to a quote or sales order, click Convert to Quote or Convert to Sales Order, respectively.
4. When you are finished viewing or modifying the opportunity, save or undo any changes and then click Close.



Contact - Manage <contact name> form: Sales tab

Sales Tab (Opportunity)

Description	Enter a brief description of the opportunity.
Sold To Customer	Enter the address book number of the opportunity's customer.
Sold To Customer Name	Enter the 40-character alphabetic name of the opportunity's customer.
Ship To Customer	Enter the 40-character alphabetic name of the customer receiving the opportunity.
Partner	Enter the address book number of the partner who is associated with the opportunity.
Sales Cycle	Enter the name of the sales cycle associated with the opportunity.
%	Enter a number from 0 - 100 that is multiplied by the amount entered in the Potential field on the Opportunity to produce the opportunity's potential.
Close Date	Enter the date on which the opportunity is projected to close.
Potential Amount	Enter the potential revenue amount that could be generated from the opportunity.
Currency Code	Enter the code for the currency that applies to the opportunity.
Opportunity Number	Enter the unique identifier related to the opportunity.

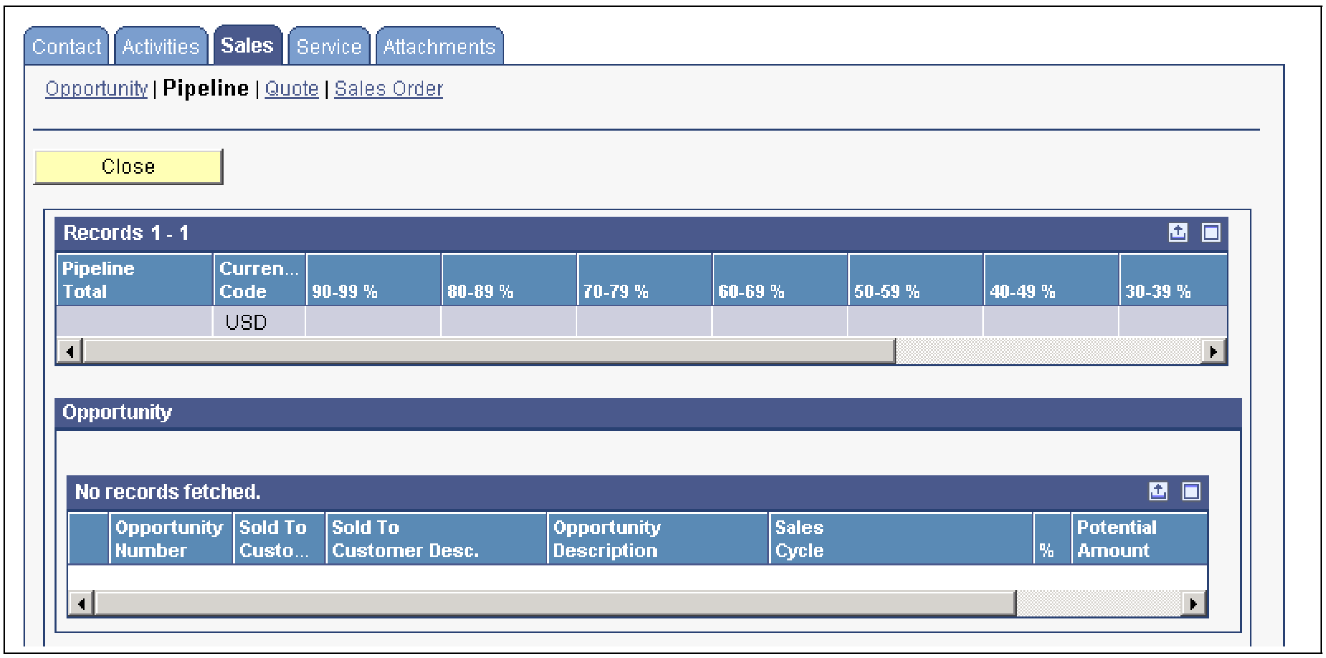
Adding an Opportunity to the Contact

Access the Contact - Add Opportunity form.

1. Enter information for the new opportunity.
2. If desired, click Credit Check to perform a credit check for the customer.
3. When you are finished adding opportunity information, select one of these options:
   - Save and Close to save the new opportunity and exit the Contact – Add Opportunity form.
   - Save and Continue to save the new opportunity and remain on the Contact - Add Opportunity form.
   - Save and Add New to save the new opportunity and clear the fields on the Contact - Add Opportunity form so you can add a new opportunity.
   - Cancel to exit the Contact - Add Opportunity form without saving.

Viewing the Pipeline

Access the Contact - Manage <contact name> form's Sales tab.

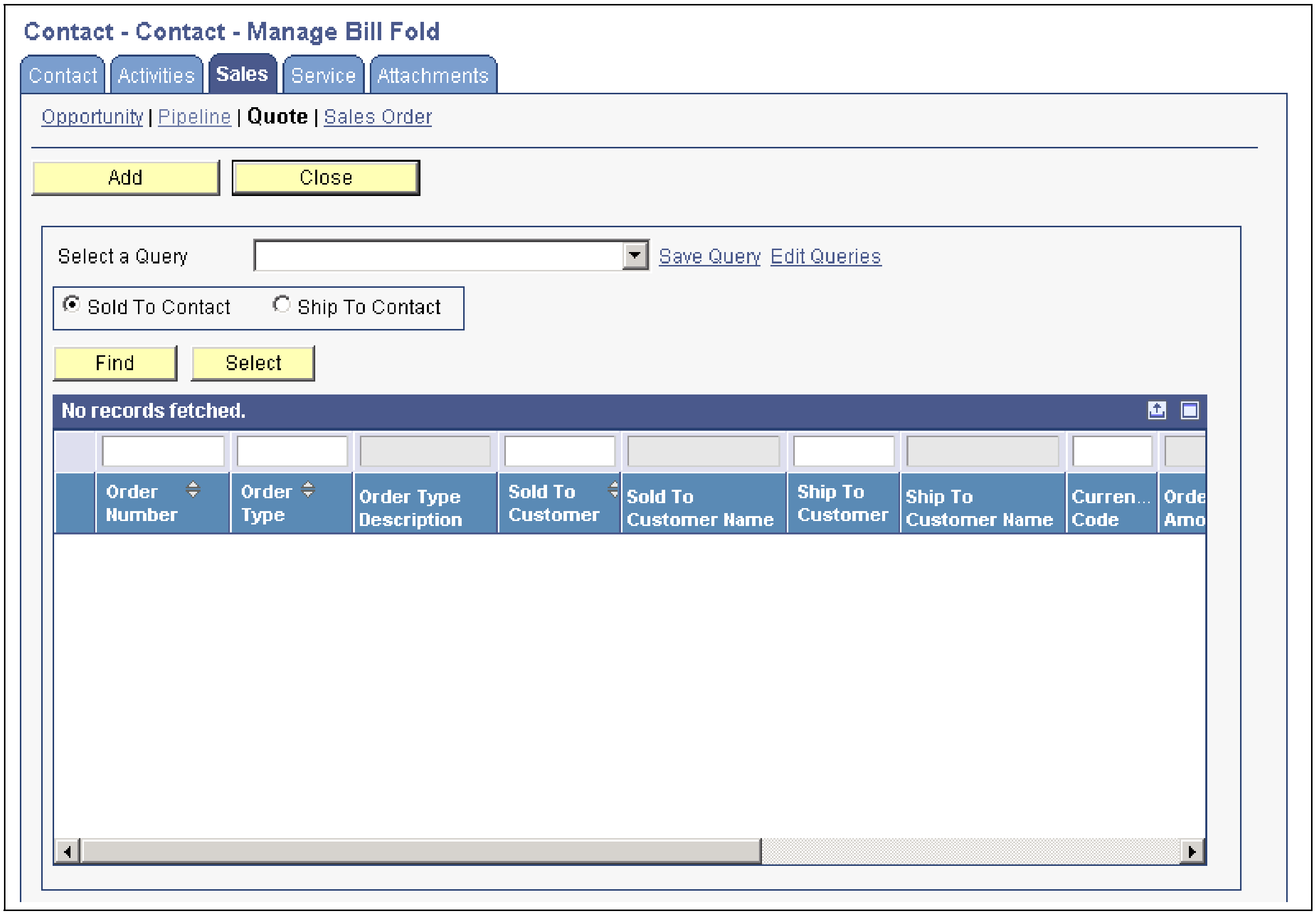


Contact - Manage <contact name> form: Sales tab: Pipeline link

Viewing or Modifying Quotes or Sales Orders

Access the Contact - Manage <contact name> form's Sales tab.

1. Find and select in the grid the quote or sales order you want to view or modify.
2. On Manage Existing Order, view or modify quote or sales order information.
3. When you are finished viewing or modifying quote or sales order information, click Close to return to the Contact - Manage <contact name> form.



Contact - Manage <contact name> form: Sales tab: Quote link

Sales Tab (Quote or Sales Order)

Order Number — Enter the number that identifies the sales order.

Order Type — Enter the user-defined code (system 00, type DT) that identifies the type of order.

Order Type Description — Enter a brief description of the order type.

Sold To Customer — Enter the address book number that identifies the customer to whom the order was sold.

Ship To Customer — Enter the address book number of the customer to whom you want to ship the order.

Currency Code — Enter the code for the currency that applies to the sales order.

Sold To Contact — Enter the line number for the customer contact to whom the order was sold.

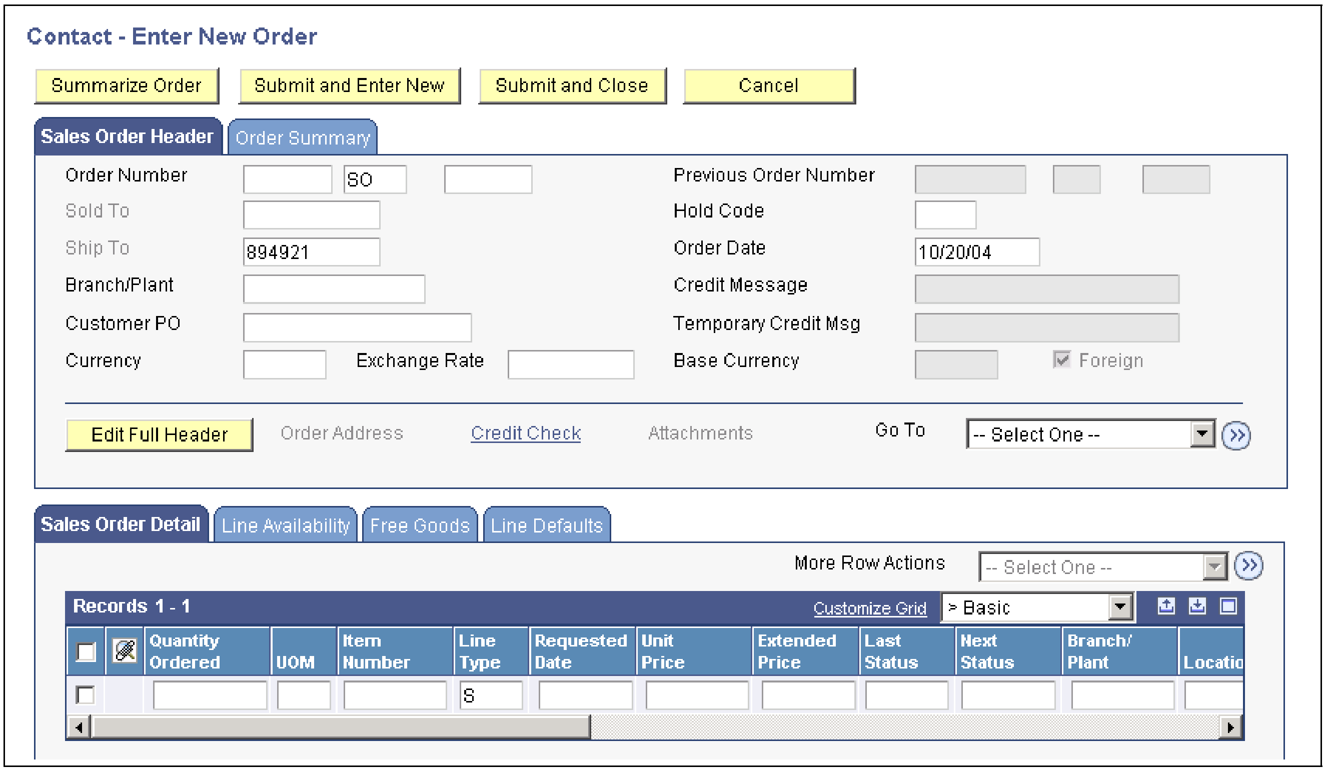
Ship To Contact — Enter the line number for the customer contact to whom the order was shipped.

Order Date — Enter the date on which the order was entered into the system. This date determines which effective level the system uses for inventory pricing.

Adding a Quote or Sales Order to the Contact

Access the Contact - Enter New Order form.

1. Enter information for the new quote or sales order.
2. When you are finished adding quote or sales order information, select one of these options:
   - Summarize Order to save the new quote or sales order without submitting.
   - Submit and Enter New to submit the new quote or order and enter a new quote or order on the Contact – Enter New Order form.
   - Submit and Close to submit the new quote or order and exit the Contact - Enter New Order form.
   - Cancel to exit the Contact - Enter New Order form without saving.



Contact - Enter New Order form

Viewing and Modifying Contact Service Information

This section provides an overview of viewing and modifying contact case information and discusses how to:

- View or modify case information.
- Add new cases to the contact.

The fields on the Contact - Manage <contact name> form's Service tab enable you to view or modify information for cases related to the contact, and to add new cases.

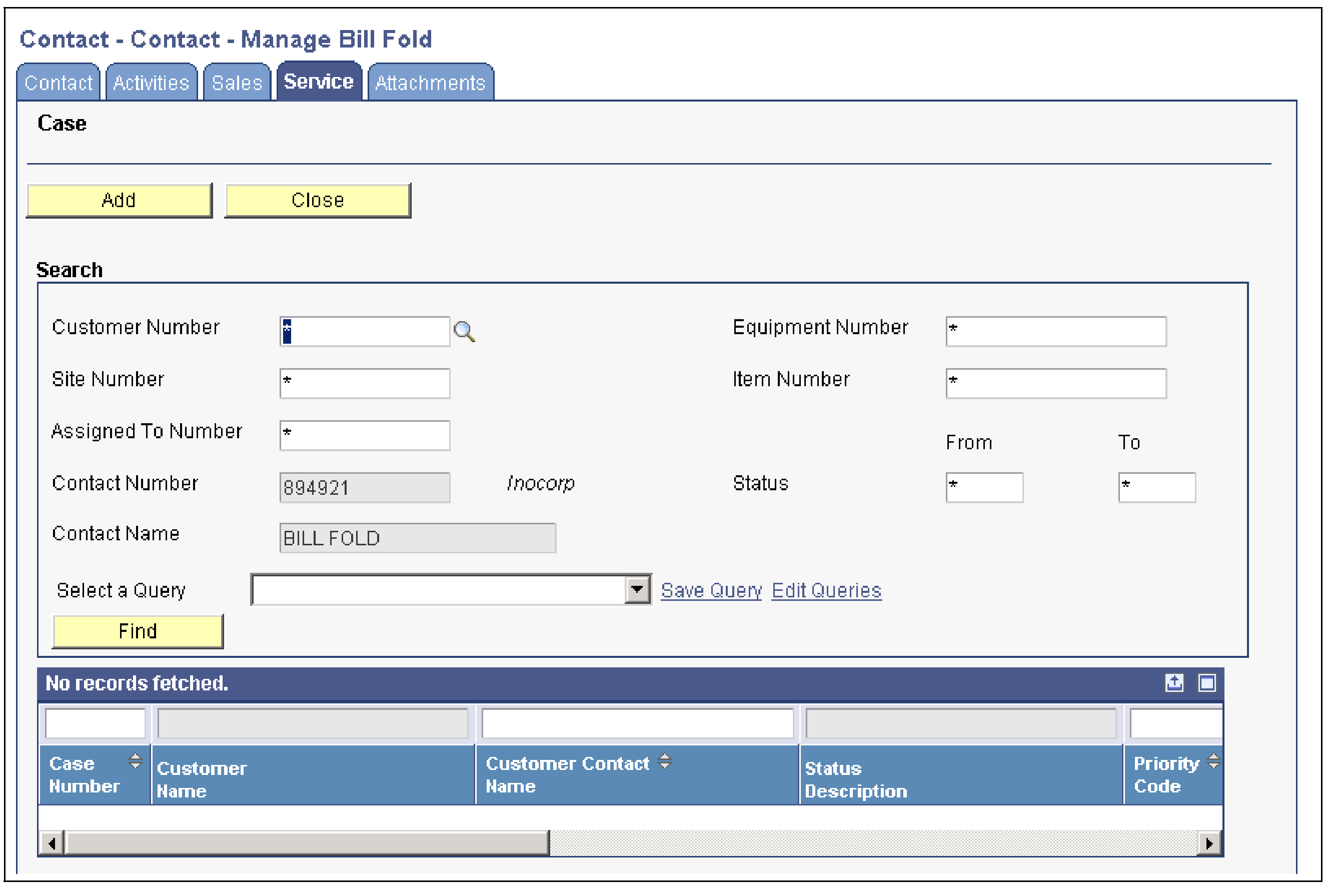
Forms Used to View and Modify Service Information

Form Name	Form ID	Navigation	Usage
Contact - Manage <contact name> Service tab.	W90CA07CA	On Contact - Manage <contact name>, click the Service tab.	View or modify service information related to the contact.
Case Update	W90CG501J	On the Contact - Manage <contact name> form's Service tab, select the case you want to view or modify.	Select the case to view or modify.
Contact - Add Case	W90CG504A	Click Add on the Contact - Manage <contact name> form's Service tab.	Add new cases to the contact.

Viewing or Modifying Case Information

Access the Contact - Manage <contact name> form's Service tab.

1. Search for and select in the grid the case whose information you want to view or modify.
2. On Case Update, view or modify case information.
3. When you are finished viewing or modifying case information, save or undo any changes, and then click Close.



Contact - Manage <contact name> form: Service tab

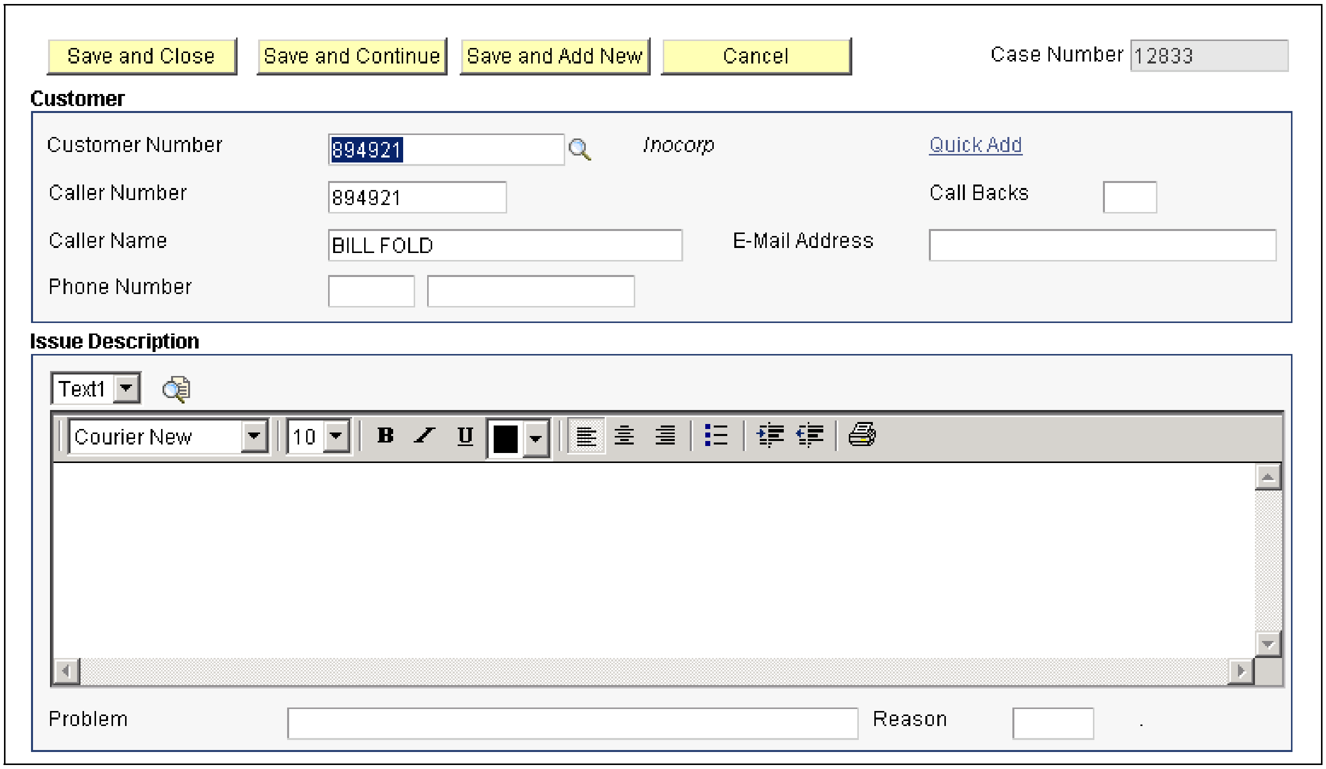
Service Tab

Customer Number	Enter a number for the customer that corresponds to an address book record. If you enter a value other than an address book number such as the long address or tax ID, you must precede the entry with the special character defined in the Address Book constants.
Equipment Number	Enter an identification code that represents an asset. The identification code must be in one of these formats: • Asset number (a computer-assigned, 8-digit, numeric control number). • Unit number (a 12-character alphanumeric field). • Serial number (a 25-character alphanumeric field).
Site Number	Enter a number for the site that corresponds to an address book record.
Item Number	Enter the system-assigned item number.
Assigned To Number	Enter the address book number for the person to whom the case is assigned.
Status From	Enter the case's beginning status.
Status To	Enter the case's ending status.
Case Number	Enter a number that identifies the case.
Customer Contact Name	Enter the name of the caller, customer, or other contact.
Priority Code	Enter a value that indicates the severity of the customer issue.
Beginning Date	Enter the date on which the case becomes active.
Committed Date	Enter the commitment date that the system calculates for returning the maintenance request or work order.
Description	Enter a brief description of the customer issue.

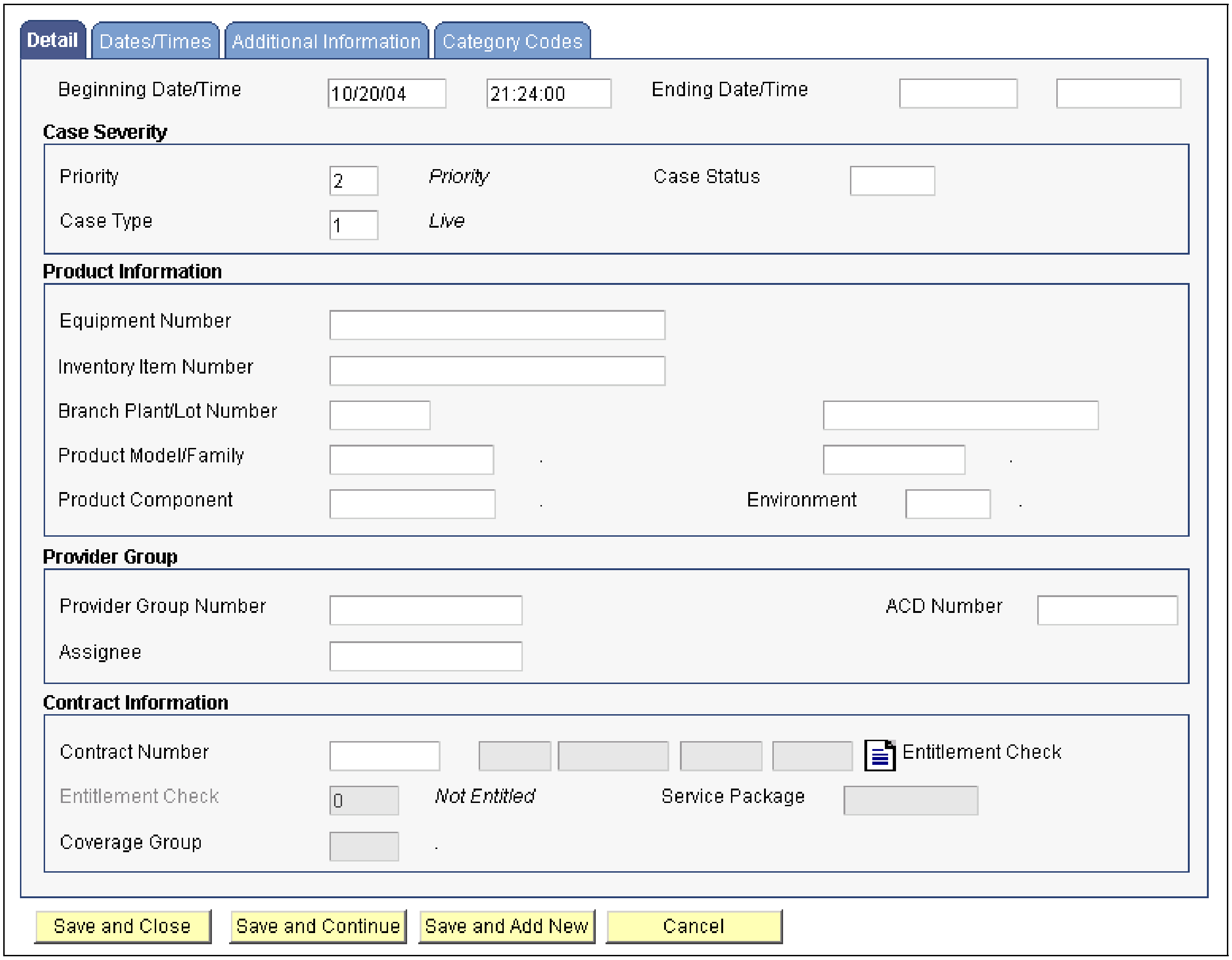
Adding Cases to the Contact

Access the Contact - Add Case form.

1. Enter information for the new case.
2. When you are finished adding case information, select one of these options:
    - Save and Close to save the new case and exit the Contact - Add Case form.
    - Save and Continue to save the new case and remain on the Contact - Add Case form.
    - Save and Add New to save the new case and clear the fields on the Contact - Add Case form so you can add a new case.
    - Cancel to exit the Contact - Add Case form without saving.



Contact - Add Case form (1 of 2)



Contact - Add Case form (2 of 2)

Viewing and Modifying Attachments For Contact

This section provides an overview of viewing and modifying attachments for contacts.

Form Used to View and Modify Contact Attachments

Form Name	Form ID	Navigation	Usage
Contact - Manage <contact name> Attachments tab.	W90CA076A	On Contact - Manage <contact name>, click the Attachments tab.	View or modify attachments for the contact.

Viewing or Modifying an Attachment For a Contact

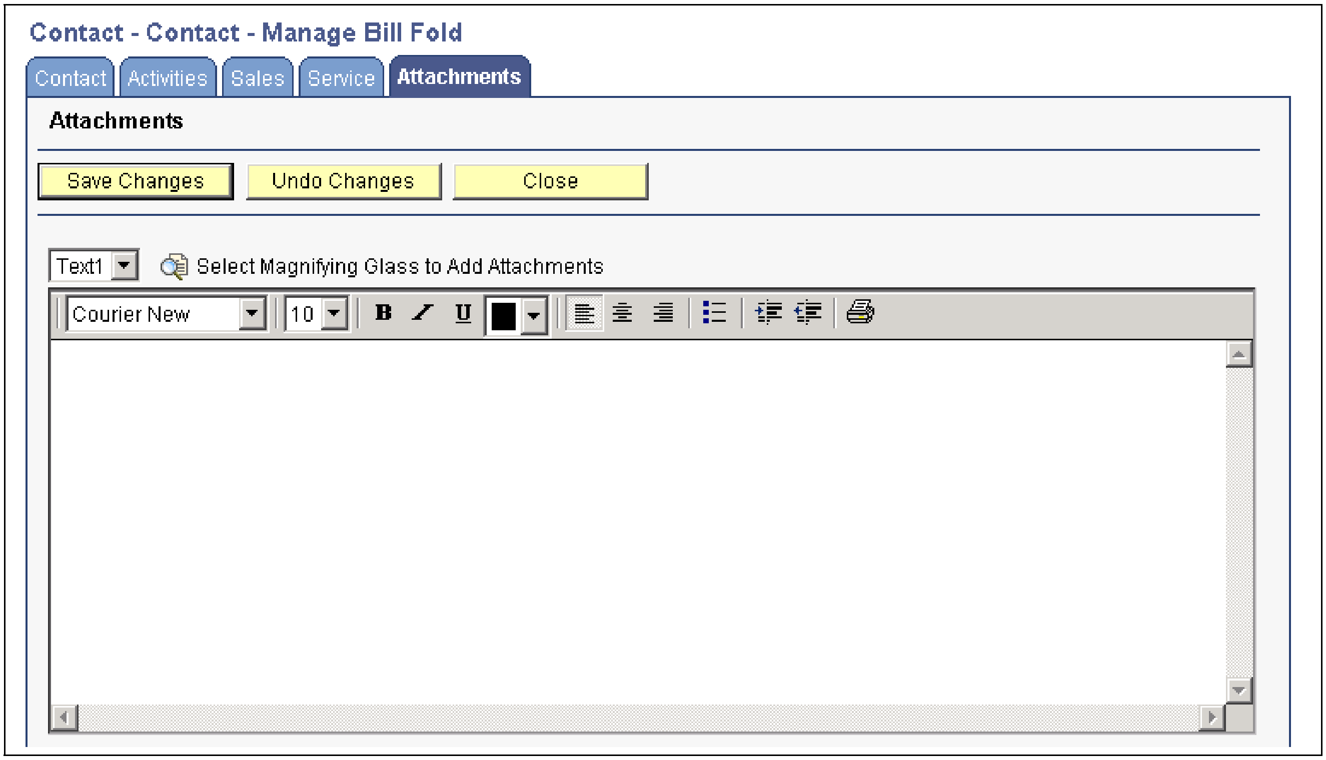
Access the Contact - Manage <contact name> form, and click the Attachments tab.

1. View or modify the message in the text area.

2. To create a different type of attachment for the contact such as an file or media object, click the magnifying glass button to access the Media Object Viewer.

   See *PeopleSoft EnterpriseOne Tools 8.94 Foundation PeopleBook*

3. When you are finished viewing or modifying attachments, save or undo any changes, and then close.



Contact - Manage <contact name> form: Attachments tab

Entering New Contact Information

This section provides an overview of viewing contact information and discusses how to:

- Set processing options for the Manage Contacts Application (P90CA070).
- Add new contacts.

Form Used to Enter New Contacts

Form Name	Form ID	Navigation	Usage
Contact - Add Contact	W90CA070A	Click Add on the Contact - Search For Contacts form.	Add a new contact.

Setting Processing Options for the Manage Contacts Application (P90CA070)

Although processing options are set up during EnterpriseOne implementation, you can change processing options each time you run a program.

Versions

1. Contact Detail Processing (P90CA074) Version

Use this processing option to specify the version of Contact Detail Processing (P90CA074) to use. If this field is blank, the system uses version *ZJDE0001*.

2. Sales Order Entry (P42101) Version

Use this processing option to specify the version of Sales Order Entry (P42101) to use. If this field is blank, the system uses version *ZJDE0001*.

3. Quote Order Entry (P42101) Version

Use this processing option to specify the version of Quote Order Entry (P42101) to use. If this field is blank, the system uses version *ZJDE0001*.

4. Opportunities (PP90CB020) Version

Use this processing option to specify the version of Opportunities (P90CA020) to use. If this field is blank, the system uses version *ZJDE0001*.

Mobile Client

If you plan to use the disconnected mobile client, you must enter options on the Mobile Client tab that affect that functionality.

1. Contact Action Security (Add, Change, and Delete)

Use this processing option to specify whether a user has the authority to add, change, or delete contact information while running on a mobile client.

2. Alternate Address Action Security (Add, Change, and Delete)

Use this processing option to specify whether a user has the authority to add, change, or delete alternate addresses while running on a mobile client.

3. Phone and Fax Action Security (Add, Change, and Delete)

Use this processing option to specify whether a user has the authority to add, change, or delete contact phone and fax numbers while running on a mobile client.

4. Electronic Address Action Security (Add, Change, and Delete)

Use this processing option to specify whether a user has the authority to add, change, or delete electronic addresses while running on a mobile client.

5. Related People Action Security (Add, Change, and Delete)

Use this processing option to specify whether a user has the authority to add, change, or delete related people while running on a mobile client.

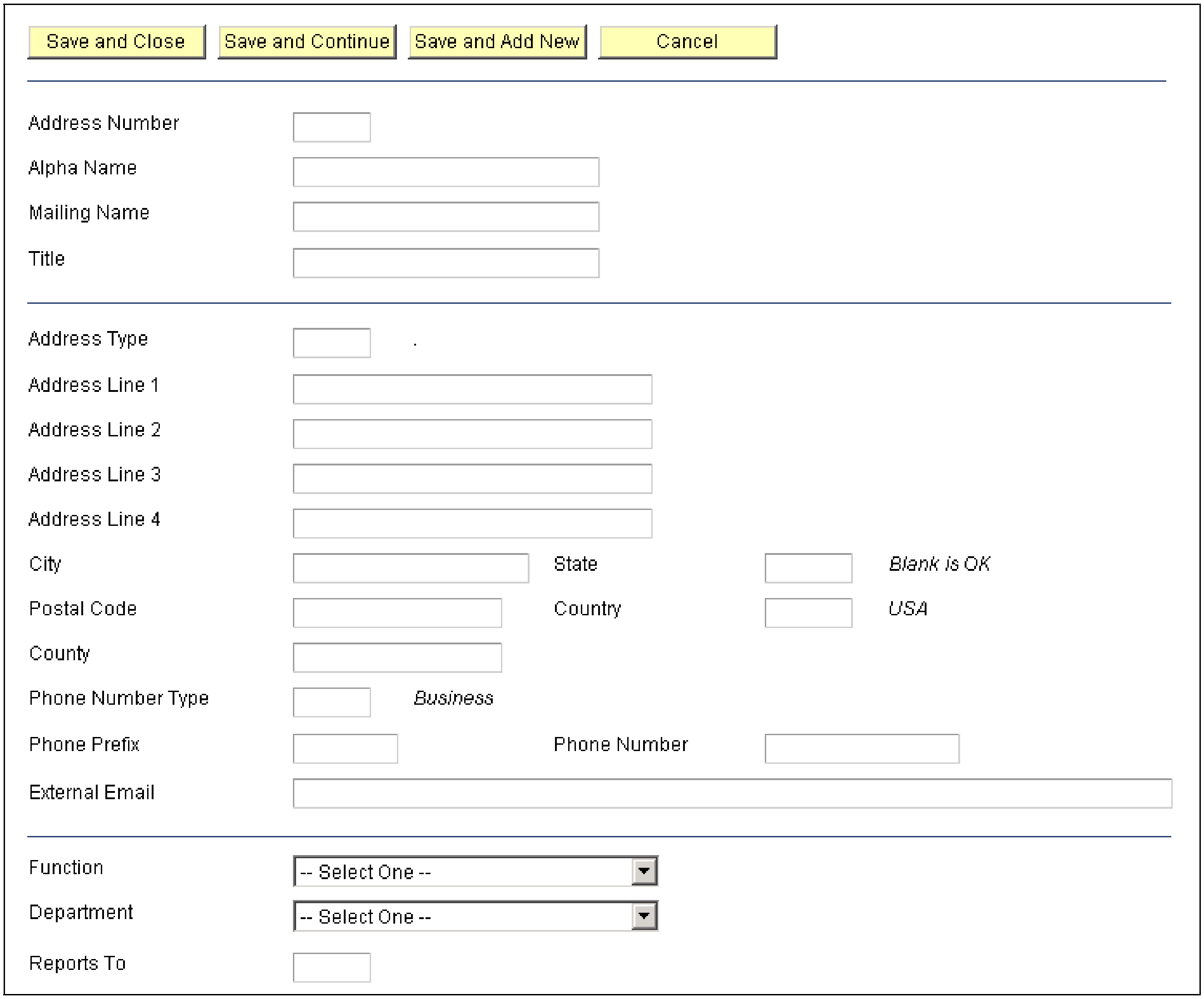
6. Related People Phone and Fax Action Security (Add, Change, and Delete)

Use this processing option to specify whether a user has the authority to add, change, or delete phone and fax numbers for related people while running on a mobile client.

Adding New Contacts

Access the Contact - Add Contact form.

1. Enter contact information.
2. When you are finished, select one of these options:
   - Save and Close to save the new contact and exit the Contact – Add Contact form.
   - Save and Continue save the new contact and continue to the Contact Revisions Form.
   - Save and Add New save the new contact and clear the fields on the Contact - Add Contact form so you can add a new contact.
   - Cancel to exit the Contact - Add Contact form without saving.



Contact - Add Contact form

Address Number
Enter a number for the contact that corresponds to an entry in the Address Book system.

Alpha Name
Enter up to 40 alphabetic characters for the contact name. You can enter dashes, commas, and other special characters, but the system does not use them when you search for a name.

Mailing Name
Enter a mailing name which represents the company or person to whom billing or correspondence is addressed.

Title
Enter the professional title of the contact as it appears in the Who's Who table.

Address Type
Enter the user-defined code (system 01, type AT) that identifies the type of address, such as a home address or an office address.

Phone Number Type
Enter the user-defined code (system 01, type PH) that indicates either the telephone's location or use, such as a business phone or home phone.

Phone Prefix
Enter the first telephone number's first segment, such as the three-digit area code used in United States.

Phone Number	Enter the contact's telephone number digits, excluding the phone prefix or special characters such as hyphens or periods. When you search for an address using a phone number, you must enter the number exactly as it is set up in the Address Book system, including any special characters.
Function	Enter the user-defined code (system 01, type FC) that indicates the function the contact serves in the company, such as consultant, manager, or staff.
Department	Enter the department in which the contact works.
Reports To	Enter the name of the person to whom the contact reports. This field is informational only and not used in any reports.
Category Code 001–020	Enter 1 to 20 reporting codes that are assigned to names in the Who's Who list. You can use these codes to identify names for special mailing lists, phone directories, and so on.

CHAPTER 9

Using the Call Plan Feature

This chapter provides an overview of the Call Plan feature and discusses how to:

- Use call plan templates.
- Create new call plan templates.

Understanding Call Plan

The Call Plan feature enables sales representatives making customer calls to view a template containing question prompts, goals, and reminders. This feature is available from the Activity (P01301) and Action Plan (P01401) applications. You can associate a call plan with an activity or action.

When viewing the forms associated with call plans from either the Activity or Action Plan application, you can make changes to any of the template fields. For example, when you are speaking with a customer, you might think of additional questions that you would like to ask other customers. When you save your changes, a copy of the call plan template is associated with the Activity or Action Plan, and the original call plan template is not affected.

The Call Plan feature enables you to create and view your own call plan templates.

Using Call Plan Templates

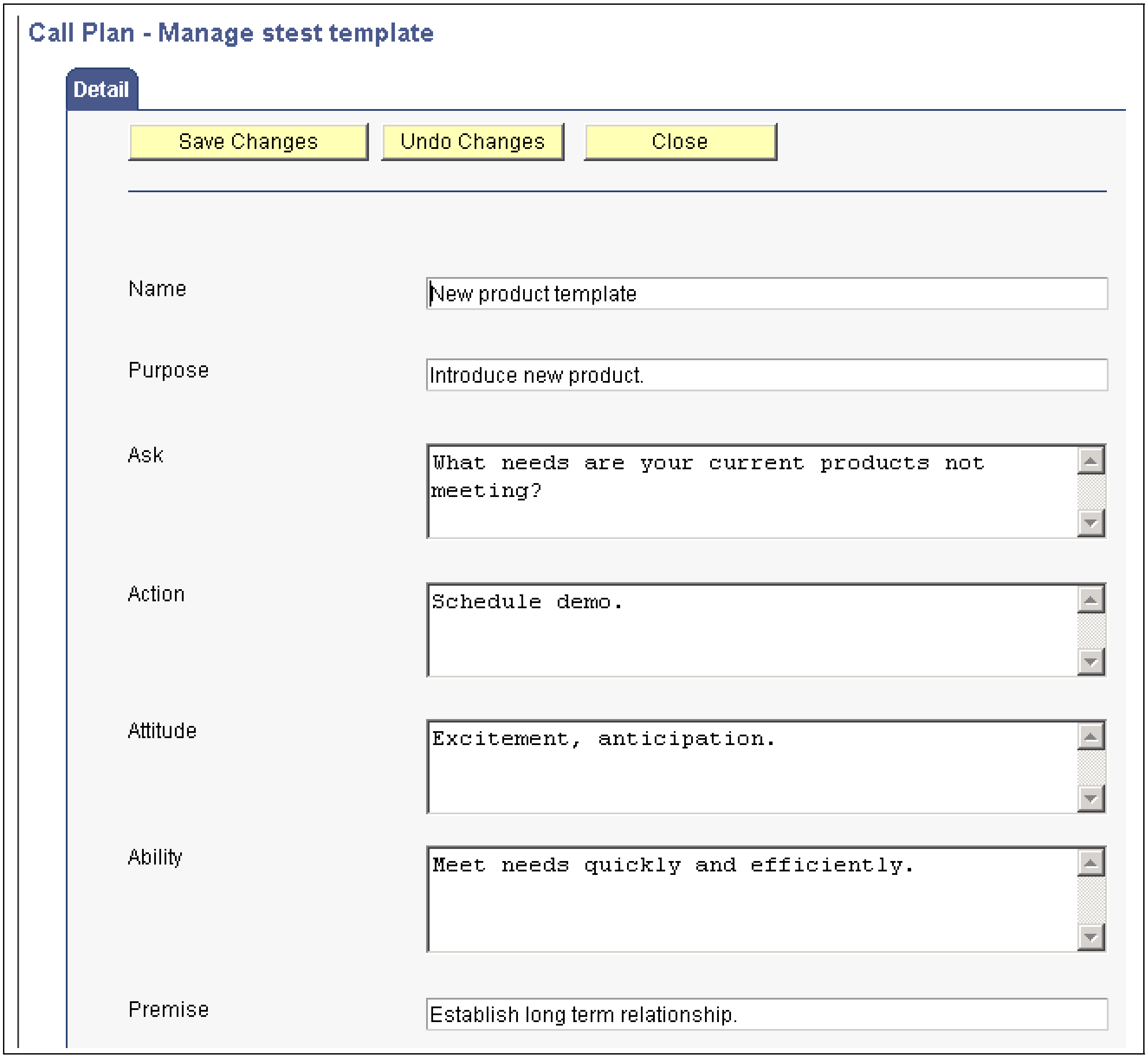
This section describes how to use a call plan template.

Forms Used to Use Call Plan Templates

Form Name	Form ID	Navigation	Usage
Activity - Edit <call name>	W01301B	EnterpriseOne Menus, Customer Relationship Management, Sales Force Automation, Daily Sales Force Automation Processing (G90CA01), Activity On Search for Activities, select the Call activity type and click Find. Select the desired activity by clicking its link.	Find and select the activity record for the call.
Activity - Call Plan	W90CA65D	On Activity - Edit <call name>, click the Call Plan link.	View the call plan.
Activity Template - Edit <activity name>	W01401F	EnterpriseOne Menus, Foundation Systems, Foundation Calendar (G01A), Action Plan On Search For Action Plan, select the Activity Template tab and click Find. Click the link for the activity that you want to select.	Find and select the activity to use.
Call Plan Template Select	W90CA65E	On Activity Template - Edit <activity name>, click Call Plan.	Select the call plan template to use for the activity.

Viewing a Call Plan Template

Access the Activity - Call Plan form.



Activity - Call Plan form

1. Use the fields as a guide or reminder while you are speaking to the customer.
2. Make any changes to the form.
3. Click Save Changes to save your changes locally.

   If you don't want to save your changes, click Undo Changes.
4. When you are finished viewing the call plan template, click Close.

Creating New Call Plan Templates

This section describes how to create a new call plan.

Understanding Call Plan Templates

The Call Plan feature includes an application that lets you create your own call plan templates for different purposes. For example, you might have a new customer template, a template for introducing new products, one for upselling, one for unhooking competitors' customers, and so on.

The only required field when creating a new template is the template Name field. However, you might also want to enter the Purpose and Premise fields because these fields appear on the grid when you search for call plan templates from the Activity and Action Plan applications.

You have these three options available when you save a new template:

- Save and Close.
- Save and Continue.
- Save and Add New.

Use Save and Close when you are finished creating templates. Use Save and Continue to save work in progress and continue creating the same template. Use Save and Add New to save the current template and clear the fields on the Add Call Plan form so that you can create another template.

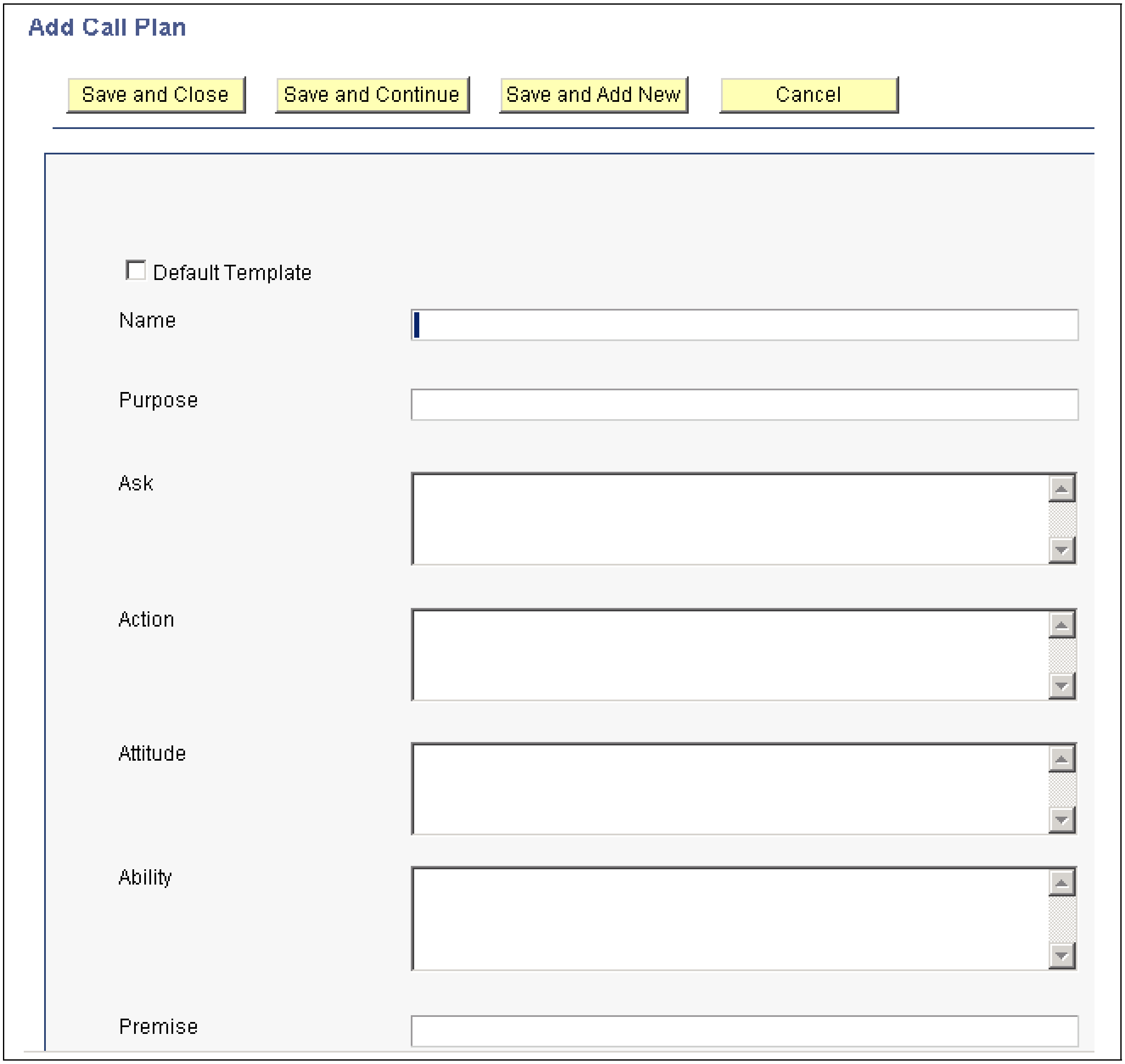
When you create a call plan template, you can specify whether to make it the default template. When you select the Default Template check box, the current template becomes the default template.

Forms Used to Create New Call Plan Templates

Form Name	Form ID	Navigation	Usage
Search For Call Plan	W90CA65F	EnterpriseOne Menus, Customer Relationship Management, Sales Force Automation, Sales Force Automation Setup (G90CA03), Call Plan	Find and select the call plan you want to use, modify, or delete.
Add Call Plan	W90CA65B	Click Add on the Search For Call Plan form.	Add a new call plan.

Creating a New Call Plan Template

Access Add Call Plan.



Add Call Plan form

Default Template	Specify whether you want to make the template the default template.
Name	Enter a unique name for the call plan template.
Purpose	Summarize the purpose of the template.
Ask	Enter any business, technical and functional questions to ask the customer.
Action	Enter any tasks to perform after the call, such as a product demonstration.
Attitude	Enter the attitude or perception you would like the customer to have after the call is completed.
Ability	Enter examples and tasks that demonstrate your ability to meet the customer's needs.

Premise	Enter the broader purpose of the call, such as to establish a long term relationship.

CHAPTER 10

Using Email and Mail Merge

This chapter provides an overview of the Email and Mail Merge features and discusses how to:

- Work with email groups.
- Use the Email application.
- Use the email merge feature.
- Use the mail merge wizard.

Understanding Email and Mail Merge

The email feature is integrated into the EnterpriseOne system and enables you to send email messages to groups or individuals without using a separate program, such as Microsoft Outlook or Lotus Notes. You can send saved messages and create new messages, and you can vary the recipients.

Rather than specifying long lists of email recipients, you can easily create groups that are comprised of individuals or subgroups. For example, you might create a groups for customers, local or regional associates, or employees in your department.

As your business needs change, you can modify email groups.

If you routinely send mass emails or regular mailings, the email merge and mail merge features might be beneficial.

The mail merge feature is driven by a wizard that guides you through the process of selecting a template and configuring it for the mailing. This process is similar to the one that is used by the Proposal Generation feature.

Email merge works like a traditional mail merge, enabling you to create personalized communications that automatically retrieve from the EnterpriseOne system information such as the recipient's name, address, and so on.

Working with Email Groups

This section provides an overview of working with email groups and discusses how to:

- Add email groups.
- Add or remove a person from a group.

Understanding Email Groups

The Email Group application enables you to create new email groups and add or remove individuals from groups.

You create new email groups in two steps: first create the group, and then add to the group the subgroups or individuals who will be included in the email's distribution when it is sent.

If you are adding one or more subgroups to a new group, it might be helpful to think in terms of hierarchy. For example, suppose you want to create a group that includes the entire sales force. The Entire Sales Force email group might consist of groups for the southern, northern, eastern, central, and western regions. However, there might be times when you want to send emails only to the western and northern sales regions, so you would still need to maintain those smaller email groups in addition to the group that includes the whole sales force.

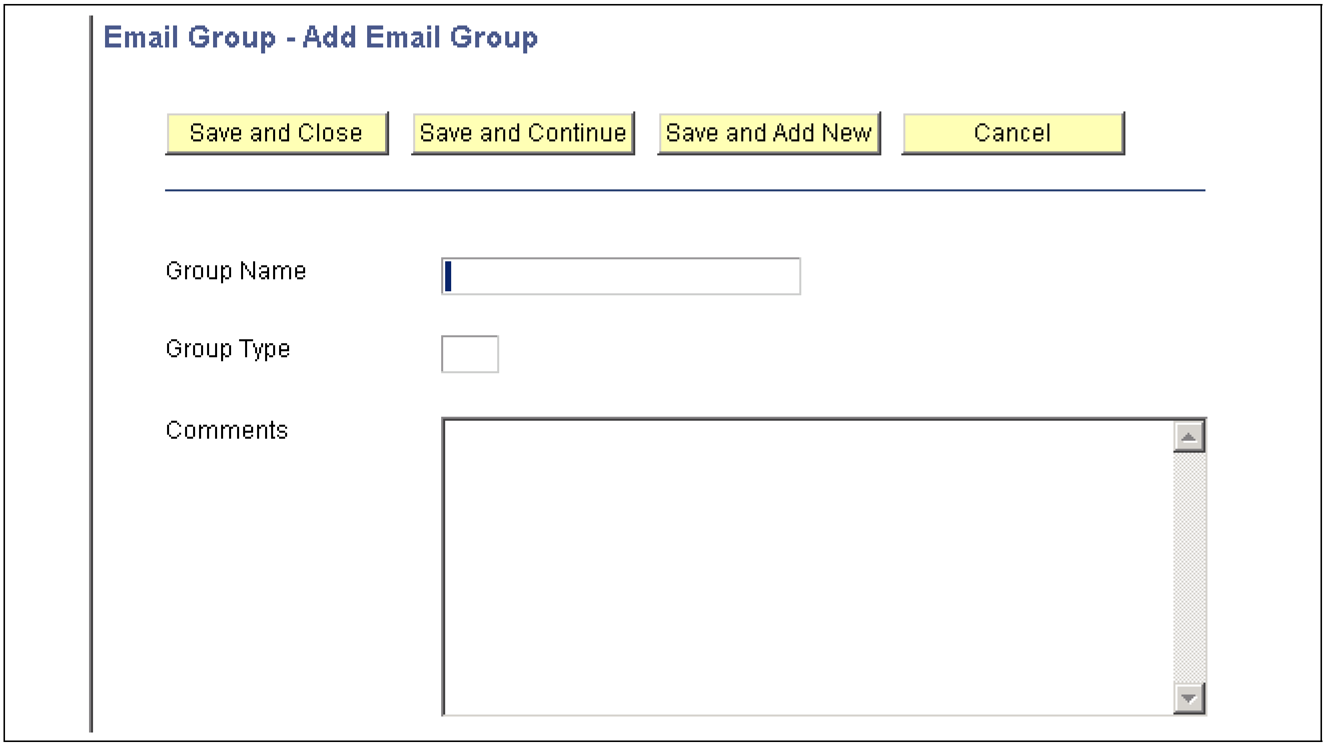
Before you create emails, you must create at least one email group.

Forms Used To Work With Email Groups

Form Name	Form ID	Navigation	Usage
Search for Email Groups	W90CA510C	• EnterpriseOne Menus, Customer Relationship Management, Sales Force Automation, Sales Force Automation Setup (G90CA03), Email Group • Click Add Email Group on the Manage <Group name> form.	Search for existing email groups.
Add Email Group	W90CA510I	Click Add on the Search for Email Groups form.	Add a new email group.
Manage <group name>	W90CA510B	Select an email group on the Search for Email Groups form.	View or modify email group information.
Search for Individuals	W90CA510F	Click Add Person on the Email - Manage <group name> form.	Search for an individual to add.

Adding Email Groups

Access the Add Email Group form.



Add Email Group form

1. Enter the group name and type, and enter any comments for the group.
2. Click the button corresponding to the action that you want to take:
   - Save and Close (save and return to the Email Group - Search For Email Groups form).
   - Save and Continue (save and continue creating the current email group).
   - Save and Add New (save and clear the form to create a new email group).
   - Cancel (discard the new email group and return to the Email Group - Search For Email Groups form).

Email Group Name	Enter a unique name to identify the email group, which may contain other groups or individual email addresses.
Group Type	Enter the group type: public, personal, or administrative.
Comments	Enter any additional comments pertaining to the group.

Adding or Removing a Person From a Group

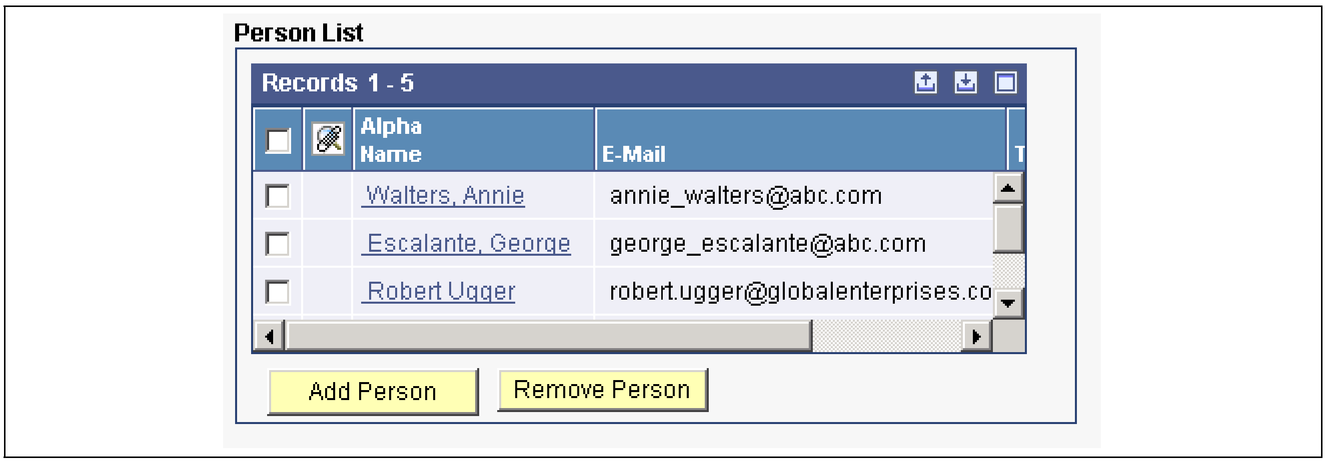
Access the Search For Email Groups form.

To add or remove a person from a group:

1. Find and select the group to which you want to add subgroups or individuals.
2. On Email Group - Manage <group name>, click Add Email Group to add a subgroup to the new group.
3. On Search for Email Groups, find and select the subgroups that you want to add to the new group.
4. On Email Group - Manage <group name>, click Add Person to add individuals to the new group.
5. On Search For Individuals, find and select individuals to add to the new group.

6. If you want to remove a subgroup or person from the new group, select the groups or persons and then click Remove Email Group or Remove Person.

Email - Manage <email name> form - Email Group List grid



Email - Manage <email name> form - Person List grid

Alpha Name Enter the person's name, or enter text that otherwise describes the person.

Address Number Enter a number that corresponds to an entry in the Address Book system.

Title Enter the professional title of a person listed in the Who's Who table.

Name Enter the person's name, as it is entered in the system.

Email Enter the email address or Uniform Resource Locator (URL) for an individual or an entity.

Person Type Enter the user defined code (system 01, type ST) that specifies the kind of address book record to search for, including employees, ex-employees, suppliers, customers, and so on.

Address Book Name Enter the person's name, as it was entered in the Address Book system.

Using the Email Application

This section provides an overview of the email application and discusses how to:

- View and modify existing email information.
- Create email messages.
- Create email attachments.
- Add or remove distribution groups and individuals.
- Send emails.
- Track sent emails.

Understanding the Email Application

You can use the email application to view previously created email messages, or to create your own email messages, which you can send when you choose. You can create a variety of template messages for notification or information, and then create distribution lists according to timing or product interest.

Distribution lists can consist of groups or individuals, and you can easily remove a group or individual that is currently on the distribution list for a particular message.

If the email requires an attachment, you can easily add additional text on the email record's Attachment tab. You can also attach an image, spreadsheet, video clip, or other media object.

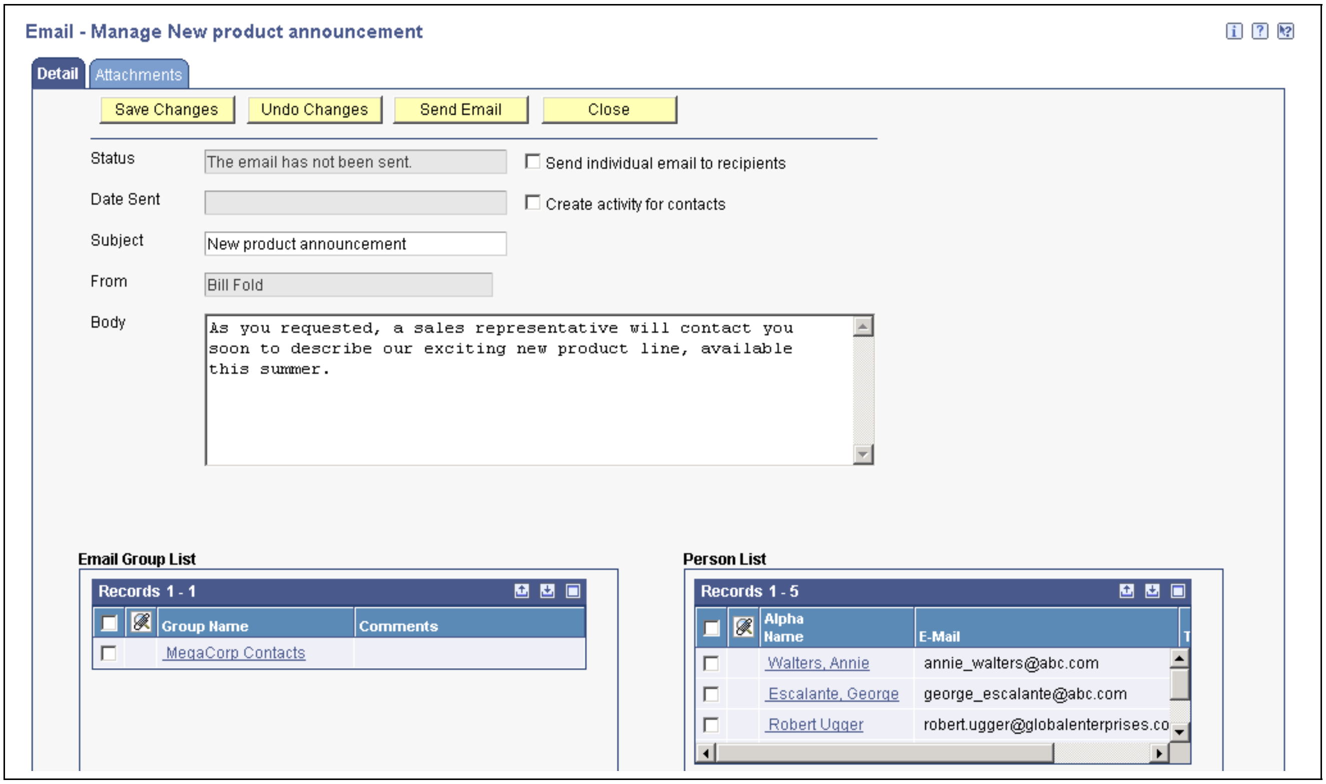
After you have created an email, you determine when the message is sent to the server for distribution to the groups or individuals that you specified. After you submit the email for distribution, you can check delivery status periodically.

Forms Used to Use the Email Application

Form Name	Form ID	Navigation	Usage
Search for Emails	W90CA500E	• EnterpriseOne Menus, Customer Relationship Management, Sales Force Automation, Daily Sales Force Automation Processing (G90CA01), Email • Or, EnterpriseOne Menus, Customer Relationship Management, Support, Daily Support Processing (G90CE01), Email	Find and select existing email messages.
Add Email	W90CA500C	• On the Search for Emails form, click Add. • Click Create Email on the Email Group - Manage <group name> form.	Add a new email.
Email - Manage <email name>	W90CA500A	On the Search for Emails form, select a previously created email message.	View or modify email information, and add or remove an email group or person.
Member For <email group name>	W90CA510E	Click the link for an email group record on the Email - Manage <email name> form's Email Group List grid.	View email group detail information.
Individual Summary	W90CA510H	Click the link for an individual record on the Email - Manage <email name> form's Person List grid.	View individual email recipient detail information.

Viewing and Modifying Existing Email Information

Access the Email - Manage <email name> form.



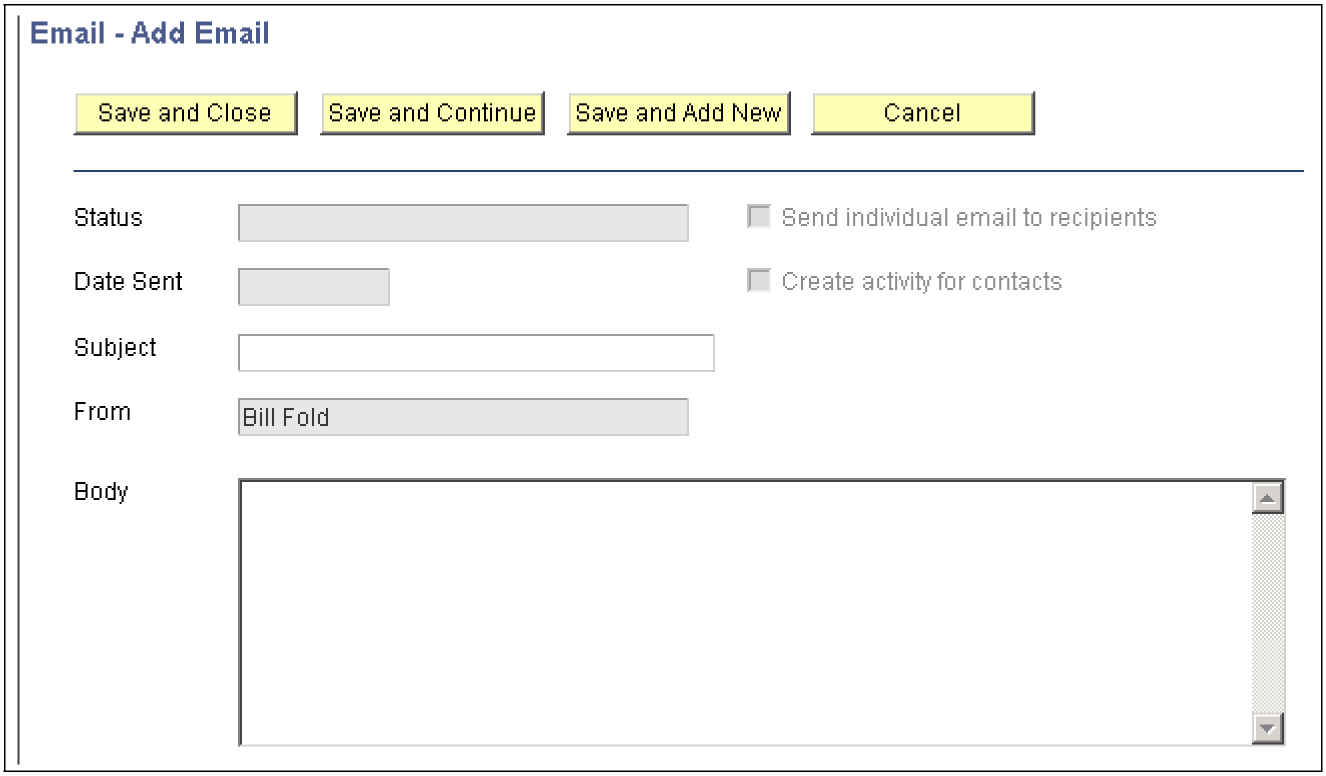
Email - Manage <email name> form

1. On the Email - Manage <email name> form's Detail tab, view or modify the email subject and message body on the top portion of the form.
2. In the Email Group List and Person List grids, view or modify email groups and individual email recipients already added to the email message.
3. To view or modify information about a specific email group or person, click the link for the group or person in the Email Group List and Person List grids.
4. To view or modify attachment information for the email message, select the Attachments tab.
5. If you want to send separate emails to individual recipients, select Send individual email to recipients.

   If you do not select this option, the system sends one email message containing a list of all recipients in the To field, and all recipients can see the other recipient names.
6. If you want to create an activity for each person in the Person List grid, select the option Create activity for contacts.
7. When you are finished viewing email information, save or undo any changes that you made, and then click Close.

Creating Email Messages

Access the Add Email form.



Add Email form

1. Complete the Subject and Body fields for the message.
2. Click the button corresponding to the action that you want to take:
   - Save and Close (save and return to the Email - Search For Emails form).
   - Save and Continue (save and continue creating the current email).
   - Save and Add New (save and clear the form to create a new email).
   - Cancel (discard the new email and return to the Email - Search For Emails form).
3. If you plan to use the email merge feature, you must select the option Send individual emails to recipients. If you do not select this option, the email merge feature may not function correctly.

Creating Email Attachments

Access the Email - Manage <email name> form.

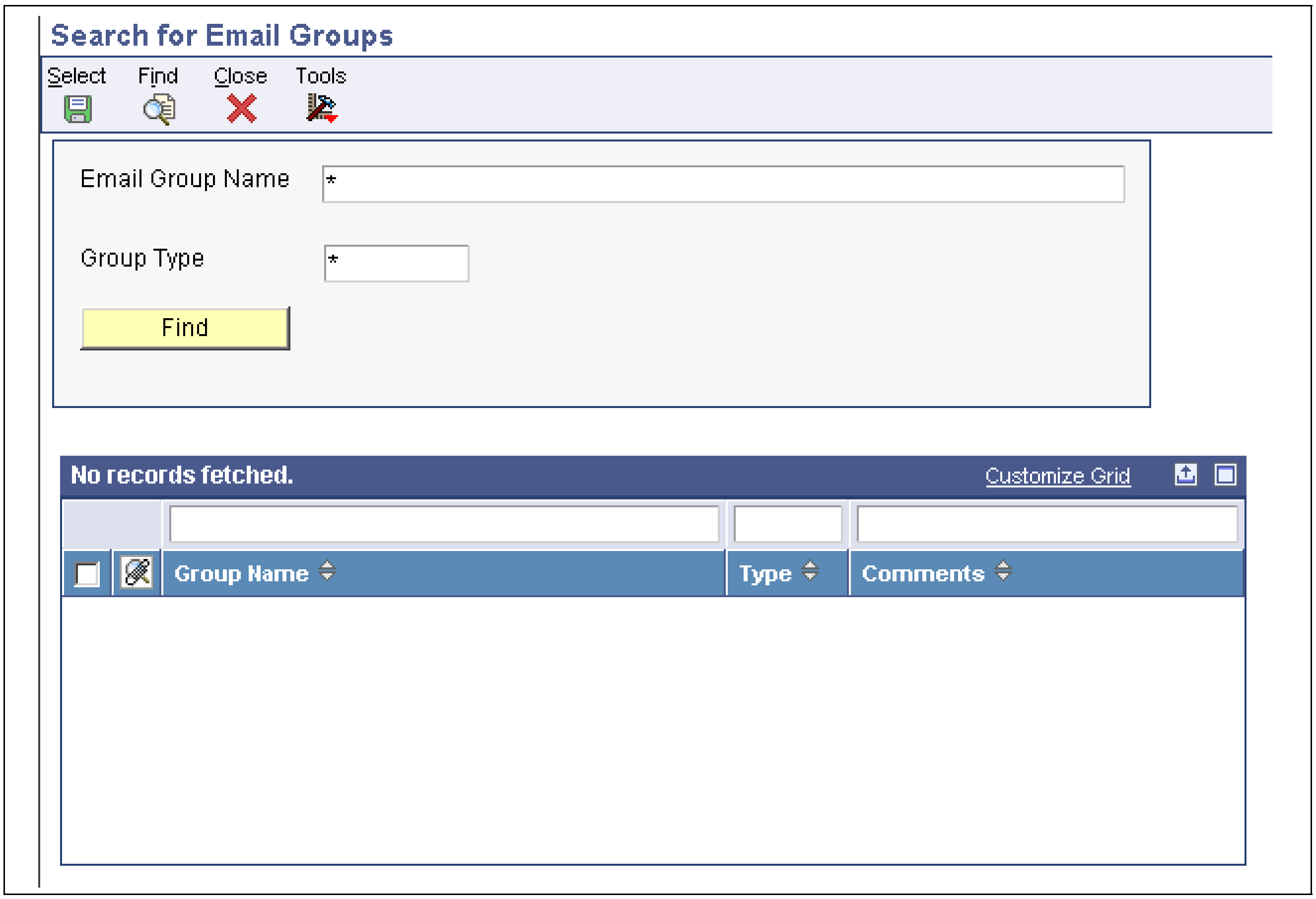
1. Find and select the email to which you want to add an attachment.
2. Select the Attachments tab.
3. To add supplemental text to the attachment, enter the text in the text box on the form.
4. To attach a document, image, URL, or other media object, click the media object button (the magnifying glass and document) to launch the Media Objects application.
5. Click Save Changes or Undo Changes, and when you are finished, click Close.

See *PeopleSoft EnterpriseOne Tools 8.94 Foundation PeopleBook*

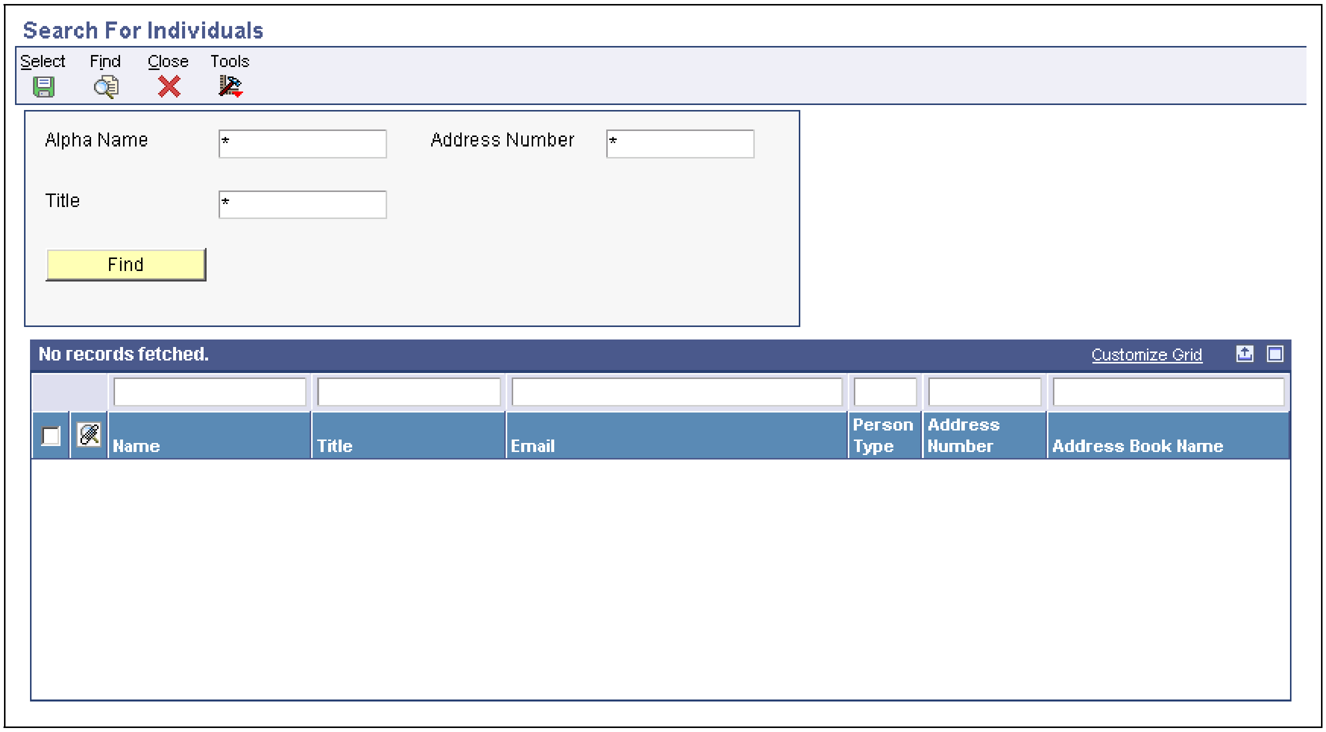
Adding or Removing Distribution Groups and Individuals

Access Email - Search For Emails.

1. Select the email for which you want to create a distribution.
2. On Email - Manage <email name>, click Add Email Group to add a group of email recipients.
3. On Search for Email Groups, find and select the groups that you want to add to the email.
4. On Email - Manage <email name>, click Add Person to add individual email recipients for the email.
5. On Search For Individuals, find and select individuals to receive the email.
6. If you want to remove an email group or person from the distribution list, select the groups or persons and then click Remove Email Group or Remove Person.



Search for Email Groups form



Search For Individuals form

Sending Emails

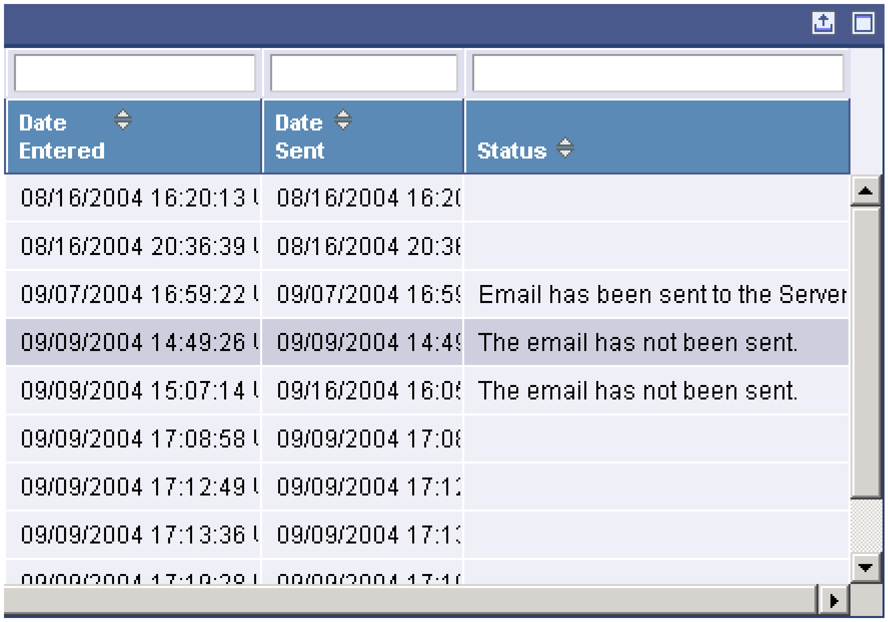
Access the Search For Emails form.

1. Find and select the email that you want to send.
2. On Email - Manage <email name>, make any final modifications to the subject, email message, or distribution list.
3. Click Send Email to send the email message.

Tracking Sent Emails

Access the Search For Emails form.

1. Find the email message for which you want to check a status.
2. In the grid area, scroll to the right until you reach the Status column, which shows the current status for all emails that you found.



Email status example

Using the Email Merge Feature

This section provides an overview of the email merge feature and discusses how to:

- Set up an email merge for contacts or employees.
- Insert tokens in the email body.

Understanding Email Merges

You access the Email Merge feature from the Contact or Employee applications. This feature is integrated into the email application, so you set up an email merge on the same form where you enter or modify email messages.

When you set up an email merge, you insert tokens into the email body. These tokens are replaced by the system with information from the Address Book and Who's Who tables. When used in conjunction with the Email Group application, the Email Merge feature enables you to create a single email message that is sent to the individuals and subgroups in the email distribution list. However, if you include a token in the salutation, when the recipient receives the email message it contains the recipient's name instead of "Dear Sir or Madame." You use other tokens for addresses, telephone numbers, or any other information in the Address Book or Who's Who tables.

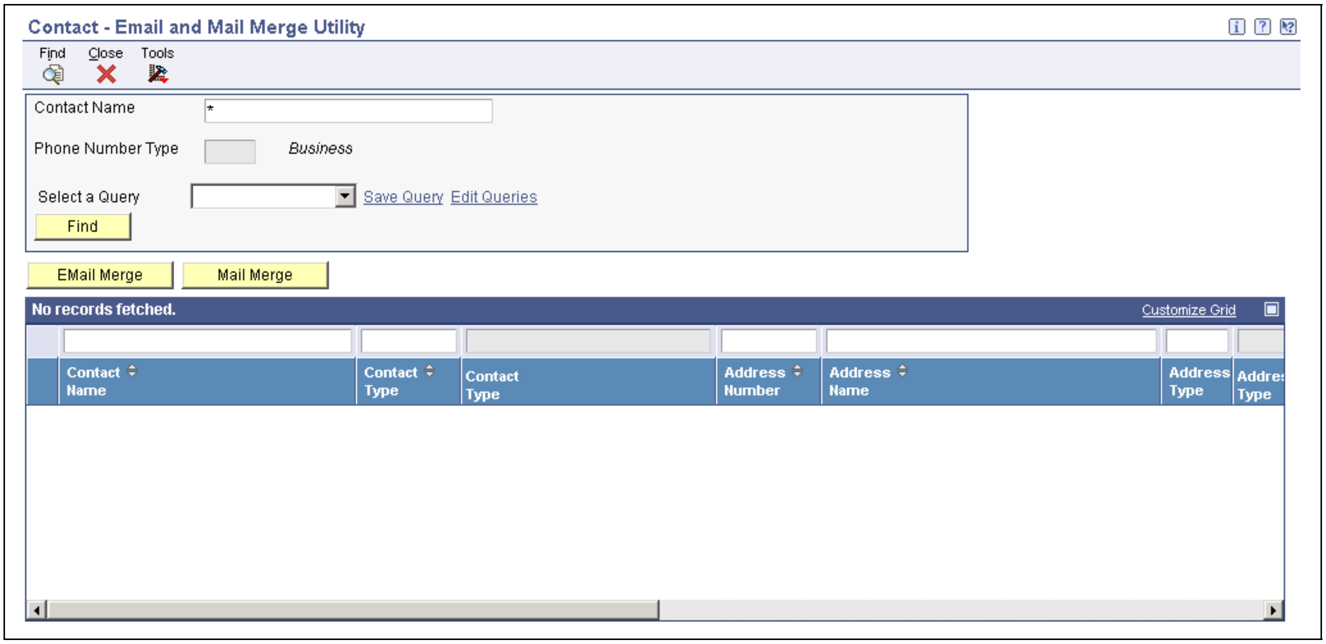
Forms Used to Use the Email Merge Feature

Form Name	Form ID	Navigation	Usage
Contact - Email and Mail Merge Utility	W90CA070D	EnterpriseOne Menus, Customer Relationship Management, Sales Force Automation, Daily Sales Force Automation Processing (G90CA01), Contact Or, EnterpriseOne Menus, Customer Relationship Management, CRM Foundation, CRM Foundation Daily Processing (G90C01), Contact Or, EnterpriseOne Menus, Customer Relationship Management, Support, Daily Support Processing (G90CE01), Contact On the Search For Contacts form (W90CA070C), click the Email and Mail Merge Utility link.	Locate contacts and access the Email Merge feature.
Contact - Email - Manage	W90CA500A	On the Contact - Email and Mail Merge Utility form, click Email Merge.	Launch the email application.
Employee - Email Merge	W90CA040E	EnterpriseOne Menus, Customer Relationship Management, Sales Force Automation, Periodic Sales Force Automation Processing (G90CA02), Employee Or, EnterpriseOne Menus, Customer Relationship Management, CRM Foundation, CRM Foundation Daily Processing (G90C01), Employee On the Search For Employees form (W90CA040F), click the Email Merge Utility link.	Locate employees and access the Email Merge feature.
Employee - Email - Manage	W90CA500A	On the Employee - Email Merge form, find and select an employee, and then click Email Merge.	Select an employee and launch the email application.

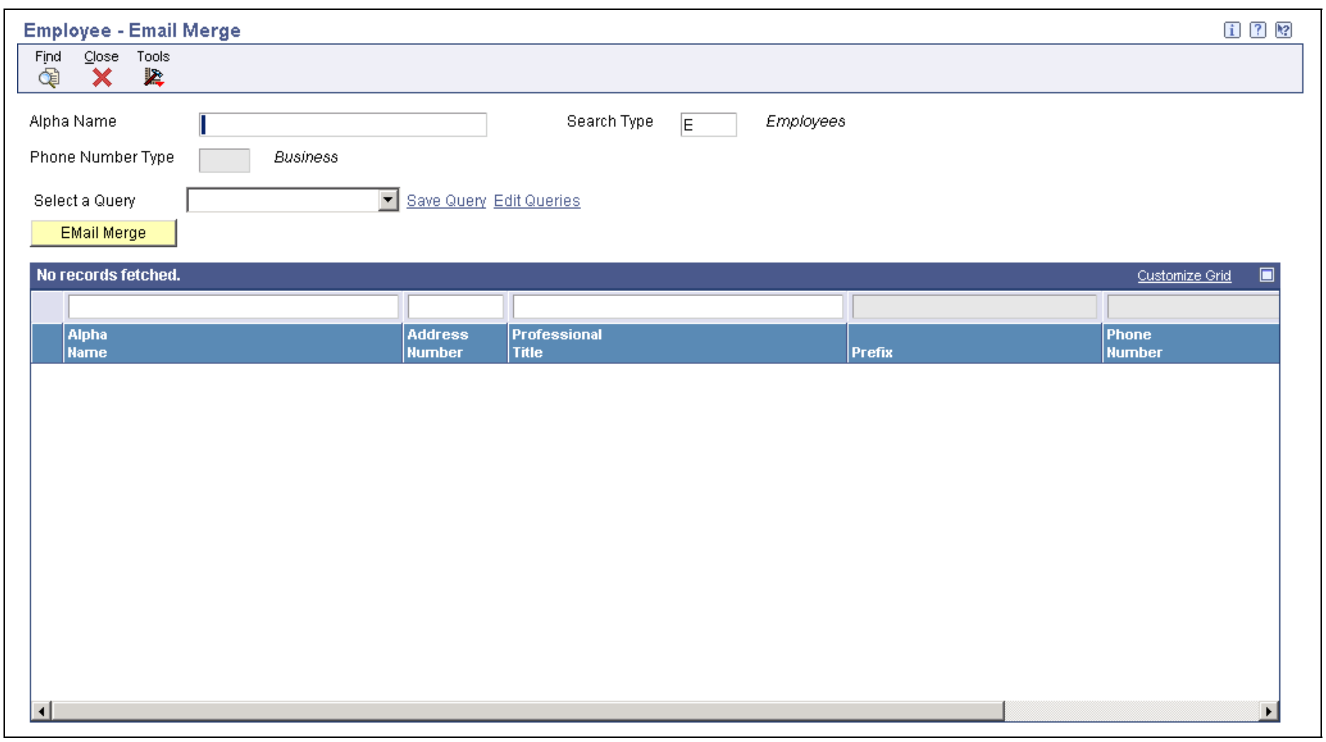
Setting Up an Email Merge for Contacts or Employees

For contacts, access the Contact - Email and Mail Merge Utility form.

For employees, access the Employee - Email Merge form.



Contact - Email and Mail Merge Utility form



Employee - Email Merge form

1. Find and select the contacts or employees for whom you want to create the email merge, and then click Email Merge.

2. On Contact - Email - Manage (or Employee - Email - Manage for employees), enter the email subject, body, and other fields on the upper half of the form as you would for a normal email message.
3. Add or remove subgroups or individuals from the distribution list.
4. Insert the tokens that you want to include in the body of the email.

   See Chapter 10, "Using Email and Mail Merge," Inserting Tokens in the Email Body, page 172.
5. Click Send Email to send the message immediately, or to save the message for sending at a later time or date, click Save Changes.

Note. Before you run the email merge, verify on the Email - Manage <email name> form that you selected the option Send individual emails to recipients. If you did not select this option, the email merge feature may not operate correctly.

Inserting Tokens in the Email Body

You can insert fields from the Address Book (F0101) or Contact (F0111) tables in the email body as a token, and the token will appear as entered when email recipients open the email. When you insert a token, be sure to surround the token with brackets on both sides, as in {*token*}.

As of the general availability date for release 8.11, all fields in the F0101 and F0111 tables support the email merge feature. Fields added to these tables after the general availability date may not support email merge. If you insert an unsupported token, the token will not be substituted with information from the Address Book or Contact tables.

The table shows the most commonly used tokens that you can insert into the body of an email message.

Token Name	Token Description	Token Source
Address Number	ABAN8	Address Book table (F0101)
Address Number	WWAN8	Address Book table (F0101)
Alpha Name	ABALPH	Address Book table (F0101)
Title	WWATTL	Contact table (F0111)
Alpha Name	WWALPH	Contact table (F0111)

Using the Mail Merge Wizard

This section provides an overview of the Mail Merge feature and discusses how to:

- Set up and execute a mail merge.
- View and print merged letters and envelopes.
- Create mail merge templates.

Understanding Mail Merges

The Mail Merge feature enables you to create documents, envelopes, and labels in pdf format that can be used to do a mail merge. Mail Merge uses a wizard that guides you through the process of doing a mail merge, from selecting a template, generating envelopes or labels, viewing a preview of the generated mail merge document, and finalizing the process.

Mail Merge is template-driven, and you assemble the merge document by using only the template components that you need.

Mail Merge templates can reside on a local machine or on a server. Templates created by the template creation program are saved on the server, but you can maintain local copies of the template.

Templates stored on the server are kept in the same location, which means that when you do a mail merge there is no distinction between a template created as a Mail Merge document, envelope, or label. Consequently, when you create Mail Merge templates you should assign names that will help you remember the template's purpose when you do a mail merge.

You access the Mail Merge feature from the Contact application. Before you launch the Mail Merge wizard, you must first select the contacts for whom you want to produce the Mail Merge document or envelope. Each of the contacts selected must have an address which has been flagged as the main address by clicking Set Main Address in the Contact application.

The Mail Merge wizard validates all of the data against the document and envelope templates. If data is missing, those rows are displayed but not included in the mail merge. (For example, the surname might be included in the template, but there is no system data for the surname.) The only exception for missing data is address lines 2, 3, and 4. In this case, the rows that are missing the address line data are not displayed, but are included in the mail merge.

Forms Used to Use the Mail Merge Wizard

Form Name	Form ID	Navigation	Usage
Search For Contacts	W90CA070C	EnterpriseOne Menus, Customer Relationship Management, Sales Force Automation, Daily Sales Force Automation Processing (G90CA01), Contact Or, EnterpriseOne Menus, Customer Relationship Management, CRM Foundation, CRM Foundation Daily Processing (G90C01), Contact	Locate and view contacts, and access the Email and Mail Merge Utility form.
Contact - Email and Mail Merge Utility	W90CA070D	On the Search For Contacts form, click the Email and Mail Merge Utility link.	Search for the contacts and launch the Mail Merge wizard.
Contact - Mail Merge Wizard - Select Template	W90CA23BA	On the Contact - Email and Mail Merge Utility form, click Mail Merge.	Specify central or local template.
Mail Merge Wizard – Select Central Template	W90CA23BB	Click Next on the Contact - Mail Merge Wizard - Select Template form.	Select a centrally located template.
Mail Merge Wizard – Select Local Template	W90CA23BC	Click Next on the Contact - Mail Merge Wizard - Select Template form.	Select a local template.
Mail Merge Wizard – Select Envelope Template	W90CA23BD	Click Next on the Mail Merge Wizard – Select Central Template or Mail Merge Wizard – Select Local Template form.	Select an envelope or label template.
Generating Mail Merge	W90CA23BJ	Click Next on the Mail Merge Wizard – Select Envelope Template form.	Finalize the mail merge process.

Setting Up and Executing a Mail Merge

Access the Contact - Email and Mail Merge Utility form.

1. Find and select the contacts for whom you want to do the mail merge.

   Note. All of the contacts shown in the grid on the Contact - Email and Mail Merge Utility form are included in the mail merge, so before continuing make sure the appropriate contacts are listed.

2. On Contact - Mail Merge Wizard - Select Template, specify whether the template you want to use is located on your local machine or on a central server.

3. If you are using a template located on a central server: On the Mail Merge Wizard - Select Central Template form, find and select the template that you want to use.

   If you are using a local template: On the Mail Merge Wizard - Select Local Template form, specify the template name and then click Upload Template.

4. If you want to produce an envelope or label, on the Mail Merge Wizard - Select Envelope Template form, select Mail Merge Generate Envelopes/Labels, and then specify whether the envelope template is on a central server or your local machine.

5. If you are using an envelope template located on a central server: On the Mail Merge Wizard - Select Central Envelope or Label Template form, find and select the template that you want to use.

   If you are using a local envelope template: On the Mail Merge Wizard - Select Local Envelope or Label Template form, specify the template name and then click Upload Template.

6. While the letters and envelopes are generating, the Generating Mail Merge form appears; click Next to continue.

7. On the Mail Merge Wizard - View form, click View Letters or View Envelopes/Labels to view the generated mail merge letters or envelopes respectively.

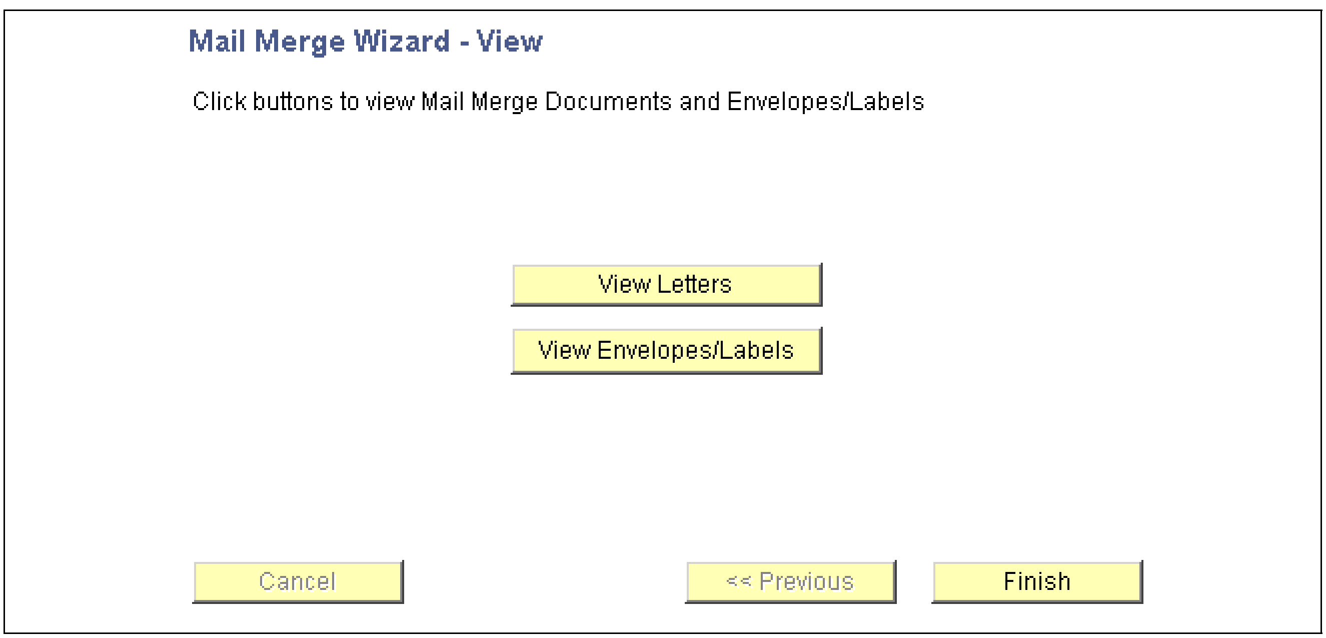
   To view letters and envelopes, you must have Adobe Acrobat Reader or some other application capable of displaying pdf files.

8. To make modifications to either letters or envelopes, click Previous until you reach the appropriate form where you can make changes.

9. When you are satisfied with the generated letters and envelopes, save them in the Adobe Acrobat Reader application.

   After saving, click Finish on the Mail Merge Wizard - View form.

Warning! Be sure to save the merged letters and envelopes or labels before you click Finish. If you click Finish before saving in the Adobe Acrobat Reader application, the information that you entered to create the generated letters and envelopes will not be saved, and you must create them again.



Mail Merge Wizard - View form

Viewing and Printing Merged Letters and Envelopes

When you are ready to view or print the letters and envelopes produced by the Mail Merge wizard, you can do so by launching Adobe Acrobat Reader. This program does not allow you to make any changes to the documents, but you can view or print as needed.

Creating Mail Merge Templates

To create Mail Merge templates, you use the same Mail Merge and Document Generation Administration program (P980040) that is used to create templates for the Document Generation wizard. The process for creating Mail Merge templates is nearly identical to creating Proposal Generation templates. The only difference is that Mail Merge templates use template type *MM* for Mail Merge and *EN* for envelopes.

The table lists the fields that can be inserted into a Microsoft Word rtf document when you create a Mail Merge template. During the mail merge process the token is replaced with information from the system:

Token Name	
PMMAddressLine1	PMMAddressLine2
PMMAddressLine3	PMMAddressLine4
PMMCountry	PMMState
PMMCity	PMMZipCodePostal
PMMCountyAddress	PMMCompanyName
PMMMailingName	PMMContactTitle
PMMSalutationName	PMMGivenName
PMMMiddleName	PMMSurname
PMMSecondaryMailingName	PMMNickName

CHAPTER 11

Generating Proposals

This chapter provides an overview of working with proposals and discusses how to:

- Create proposal template parts.
- Create proposal templates.
- Modify proposal templates.
- Create proposals.

Understanding Proposal Generation

You can use the proposal generation feature to produce not only sales proposals, but other types of documents as well. This feature enables you to "mix and match" document components, enabling you to specify everything you want to include on the generated document. For example, you could create a product mailing for your customers that contains your company logo, a description of a new product, and pricing information.

The proposal generation feature uses templates that let you easily attach document parts (such as a quote detail and quote summary) to a proposal document. For example, the proposal you generate from the template might include the address to which the last order was shipped, estimated or actual order start dates, and special delivery instructions.

To supplement the templates that PeopleSoft provides, you can easily create your own templates for general or specific use. You create templates by first creating the document parts or components that are used in the template. Document parts can consist of text and images. As your needs change, you can also modify or delete templates.

After you create a proposal, it is attached to a sales order. And, because proposals are saved as media objects, you can also make proposals available online or email the generated proposal.

Creating Proposal Template Parts

This section provides an overview of creating proposal template parts and discusses how to:

- Create template parts.
- Create tags to insert in RTF documents.
- Insert tags in RTF documents.

Understanding Template Parts

Before you can create a new document template, you must first create the parts the template uses. Document parts can consist of text or images. Other document parts might come from the PeopleSoft EnterpriseOne system, such as sales data.

You create template parts by using an application such as Microsoft Word that can save documents in RTF format. Your RTF document can contain text, images, graphics, or links to web sites. You can also insert tags into fields that retrieve information, such as customer or product information from the EnterpriseOne database when the proposal is generated. To insert tags into an RTF document, you must follow a specific procedure and enter only tags that are recognizable by the EnterpriseOne system. If you type a tag name in the RTF document, EnterpriseOne data will not be retrieved.

Remember that templates are created from these individual RTF documents, so to give yourself as much flexibility as possible, your RTF documents should not contain too much information. For example, you might want your company logo to reside in its own RTF document so you can place it anywhere in the generated proposal. If your logo is part of the company name and address, you cannot move it to another part of the generated proposal.

Creating Template Parts

Launch Microsoft Word or any other application that lets you save documents in RTF format. (For the remainder of these instructions, Microsoft Word is used as an example.)

1. Open a new Microsoft Word document.
2. Enter or insert text, a graphic file, URL, website link, or anything else that can be imported into the Microsoft Word file.
3. Save the RTF document, making sure to assign a name that will help you identify the file contents when you create the proposal template.

   You can save RTF documents anywhere you like, but you must know the location when you create templates within EnterpriseOne.

Creating Tags to Insert in RTF Documents

Launch Microsoft Word or any other application that lets you save documents in RTF format. (For the remainder of these instructions, Word is used as an example.)

1. Select Properties from the File menu and click the Custom tab.
2. Enter the tag name in the Tag field.

   The name should reflect the value of the tag that will be inserted into the RTF document.
3. In the Value field, enter the tag exactly as it appears in the Tags table at the end of this task.
4. Click Add to save the tag.
5. Repeat the process for additional tags.

   When you are finished adding tags, click OK.

Inserting Tags in an RTF Document

Launch Microsoft Word or any other application that lets you save documents in RTF format. (For the remainder of these instructions, Word is used as an example.)

1. Select Field from the Insert menu.
2. In the Field Names field, select DocProperty to display a list of available tags.

   The tags that you created previously should be available.
3. Select from the Property list the tag you want to insert.
4. Click OK.
5. Repeat the process to insert additional tags elsewhere in the RTF document.

You can insert general tags that retrieve the quote number or date. You can also insert tag names that retrieve a specific EnterpriseOne field, or tag titles that are used in conjunction with a tag name. When you insert a tag title and tag name combination in an RTF document, the tag title is a label for the field. For example, if you insert the tag title TTType and the tag name SOHOrderType, the generated proposal contains “Type: A.”

When you use tag titles with tag names, use the format tag title:tag name (for example, TTType:SOHOrderType):

General Tag Name	Description
Quote	Inserts the CompanyKeyOrderNumber and the date.
Month	Inserts the month in two-digit format.
Day	Inserts the day in two-digit format.
Year	Inserts the year in four-digit format.

Tag Titles	
TTBranchPlant	TTPurchaseOrder
TTCancelledDate	TTQuantity
TTCurrencyCode	TTRequestedDate
TTDescription	TTShipTo
TTExtendedAmount	TTShipToAttention
TTExtendedPrice	TTShipToContact
TTItem	TTSoldTo
TTItemDescription	TTSoldToAttention
TTLineItemTotal	TTType
TTLineType	TTUnitPrice
TTUOM	Unit of measure

Sales Order Header (F4201) Tags	
SOHCompanyKeyOrderNumber	SOHPrintMessage1
SOHDocumentOrderInvoice	SOHAmountOrderGross
SOHOrderType	SOHAmountTotalCost
SOHCompany	SOHAuthorizationNoCredit
SOHAddressNumber	SOHAcctNoCrBank
SOHAddressNumberShipTo	SOHDateExpired
SOHAddressNumberParent	SOHDateRequestedShip
SOHDateRequestedJulian	SOHCostCenter
SOHDateTransactionJulian	SOHCompanyKeyOriginal
SOHDateOriginalPromised	SOHOriginalPoSoNumber
SOHActualShipDate	SOHOriginalOrderType
SOHCancelDate	SOHTaxArea1
SOHDatePriceEffectiveDate	SOHTaxExplanationCode1
SOHDatePromisedShipJulian	SOHHoldOrdersCode
SOHReference1	SOHCurrencyMode
SOHReference2Vendor	SOHCurrencyCodeFrom
SOHDeliveryInstruction1	SOHAmountForeignOpen
SOHDeliveryInstruction2	

Currency Code (F0013) Tags	Address Book Master (F0101) Tags
CCDescription	ABMTaxId
CCEditCode	ABMNameAlpha

Business Unit Master (F4006) Tags	
BUMCostCenter	BUMInvstmtSummurizaMeth
BUMCostCenterType	BUMGLBankAccount
BUMDescritpionCompressed	BUMDatePlannedStartJ
BUMCompany	BUMDateActualStartJ

Business Unit Master (F4006) Tags	
BUMAddressNumber	BUMDatePlannedCompleteJ
BUMAddressNumberJobAr	BUMDateActualCompleteJ
BUMCounty	BUMDateOther5J
BUMState	BUMDateOther6J
BUMTaxArea	BUMDteFinalPaymntJulian
BUMTaxEntity	BUMAmtCostAtCompletition
BUMTaxArea1	BUMAmtProfitAtCompletition
BUMAllocaSummurizaMeth	

Order Address Information (F0006) Tags	
OAIDocumentOrderInvoiceE	OAIAddressLine4
OAIOrderType	OAIZipcode
OAICompanyKeyNo	OAICity1
OAINameMailing	OAICountyAddress
OAIAddressLine1	OAIState
OAIAddressLine2	OAICountry
OAIAddressLine3	

The PeopleSoft software includes two templates—a Quote Summary and a Quote Detail template. You can use these templates as-is, or copy and modify them as needed. The Quote Summary template provides a high level overview of the entire sales order, while the Quote Detail template references specific line items associated with a sales order:

Quote Summary Template Fields	
Quote (Quote)	Quote date (Month/Day/Year)
Purchase Order (SOHReference1)	TTType (SOHOrderType)
TTCancelledDate (SOHCancelDate)	TTSoldTo (ABMSoldToNameAlpha)
TTSoldToAttention (SOHSoldToAttention)	Sold To Contact (SoldToNameMailing)
SoldToAddressLine1	SoldToAddressLine2
SoldToAddressLine3	SoldToAddressLine4

Quote Summary Template Fields	
SoldToCity1	SoldToState
SoldToCountyAddress	SoldToZipcode
SoldToCountry	TTShipTo (ABMShipToNameAlpha)
TTShipToAttention (SOHShipToAttention)	Ship To Contact (ShipToNameMailing)
ShipToAddressLine1	ShipToAddressLine2
ShipToAddressLine3	ShipToAddressLine4
ShipToCity1	ShipToState
ShipToCountyAddress	ShipToZipcode
ShipToCountry	TTLineItemTotal (SODDerivedLineItemTotal)
SOHCurrencyCodeFrom	TTItem
TTDescription	TTQuantity
TTUOM	TTUnitPrice
TTExtendedAmount	

Quote Detail Template Fields	
Name/alpha	Cost center
Line item number	Description
Line item description	Units transaction quantity
Unit of Measure	Unit price
Extended amount	Currency Code
Requested date julian	

Creating New Proposal Templates

This section provides an overview of creating proposal templates and discusses how to:

- Create a new data set.
- Create a new simple template.
- Create a new composite template.
- Copy a simple or composite template.

Understanding Proposal Templates

After you create document parts in the form of RTF files, you must create a data set (or use an existing data set). You create a data set by providing the data set name, description, and product code. You can use the same data set for multiple templates.

You can create a *simple template* that contains only one document part, or a *composite template* that contains multiple document parts. A simple template might be an all-in-one document such as a boilerplate quote or form letter. A composite template might include your company logo, a price list, some text describing a new product, and an image of the new product. For a composite template, all of these document parts (the logo, price list, and so on) would be in separate documents. Or, you could use any of these documents (such as the price list) as a simple template.

The following equations might be useful in helping you understand:

Data Set + RTF File = Simple Template

Simple Template + Simple Template + Simple Template ... = Composite Template

After you create a new simple or composite template and change its respective statuses to Active, your template will be included in the list of available templates the next time you launch the Proposal Generation wizard.

Forms Used To Create Proposal Templates

Form Name	Form ID	Navigation	Usage
Mail Merge & Document Generation Administration	W980040O	Enter P980040 in the Fast Path field.	Add data sets, simple templates, and composite templates.
Work With Data Set Headers	W980040E	Click Data Set Administration on the Mail Merge & Document Generation Administration form. (Also available from the Form menu on many forms.)	Add, modify, or delete data sets.
Add Data Set Header	W980040D	Click Add on Work With Data Set Headers.	Add a new data set.
Work With Simple Template Headers	W980040C	Click Data Set Administration on the Mail Merge & Document Generation Administration form.	Add, modify, or delete simple templates.
Add Simple Template Header	W980040B	Click Add on Work With Simple Template Headers.	Add a new simple template.
Simple Template Search and Select	W980040K	Click the visual assist button at the Template ID field on Work With Composite Template Details.	Add document parts to a simple template.
Work With Composite Template Headers	W980040G	Click Composite Template Administration on the Mail Merge & Document Generation Administration form.	Add, modify, or delete composite templates.
Add Composite Template Header	W980040F	Click Add on Work With Composite Template Headers.	Add a composite template.
Work With Composite Template Details	W980040T	Select View Details from the Row menu on Work With Composite Template Headers.	View, add, or modify information for a composite template.
Copy Mail Merge Simple Template	W980040B	On Work With Simple Template Headers or Work With Composite Template Headers, click Copy.	Copy an existing form. **Note.** (Although this form is used by the Proposal Generation feature, it is called Copy Mail Merge Simple Template because the form is shared by the Mail Merge feature.)

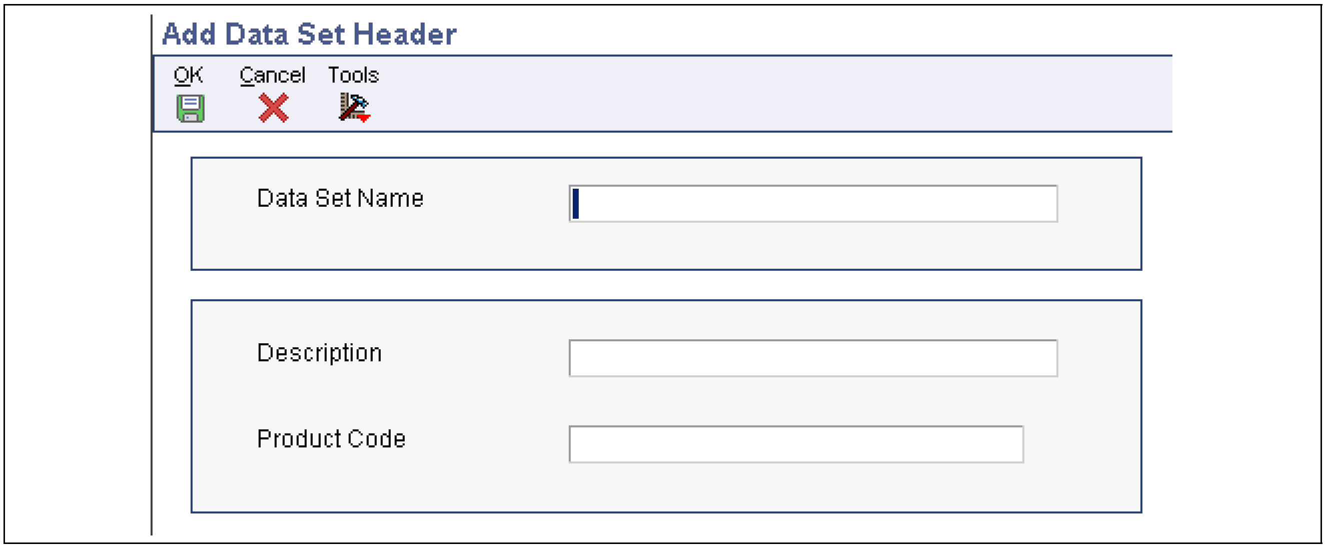
Creating a New Data Set

Access the Add Data Set Header form.

Data Set Name Enter the name of the data structure template.

Description Enter a description of the data set.

Product Code Enter the product associated with the data set.

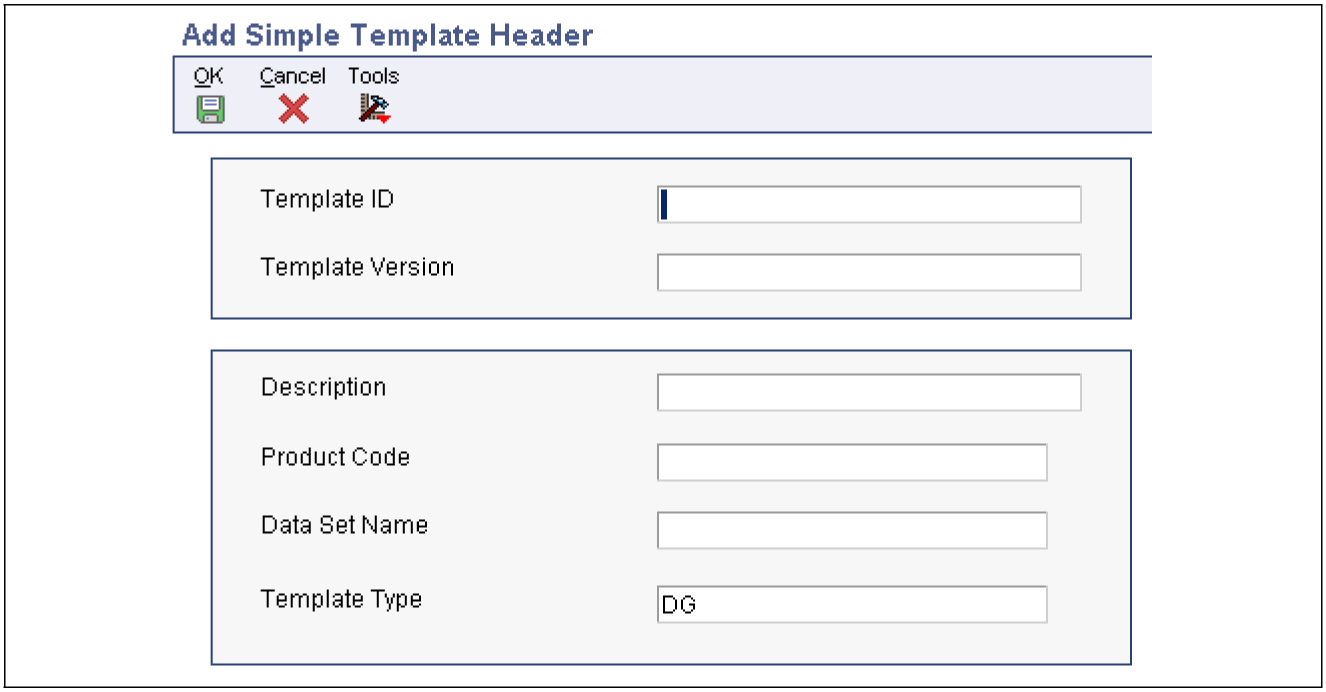


Add Data Set Header form

Creating a New Simple Template

Access the Add Simple Template form.

1. Enter information on the Add Simple Template form.
2. On the Upload Template form, click Browse to locate existing RTF files.
3. In the Windows Choose File window, select the RTF file you want to use to create the simple template.
4. On Upload Template, click Load
5. On Work With Simple Header Templates, select the template you just created and then select Change Status from the Row menu to make the template active.



Add Simple Template Header form

Template ID Enter the template name or identifier.

Template Version Enter the template version.

Description Enter a brief description of the template contents.

Product Code Enter the product that is associated with the template.

Data Set Name Enter the data set that is used by the template.

Template Type Enter the template type. Values are:

DG: Document Generation

EN: Envelopes

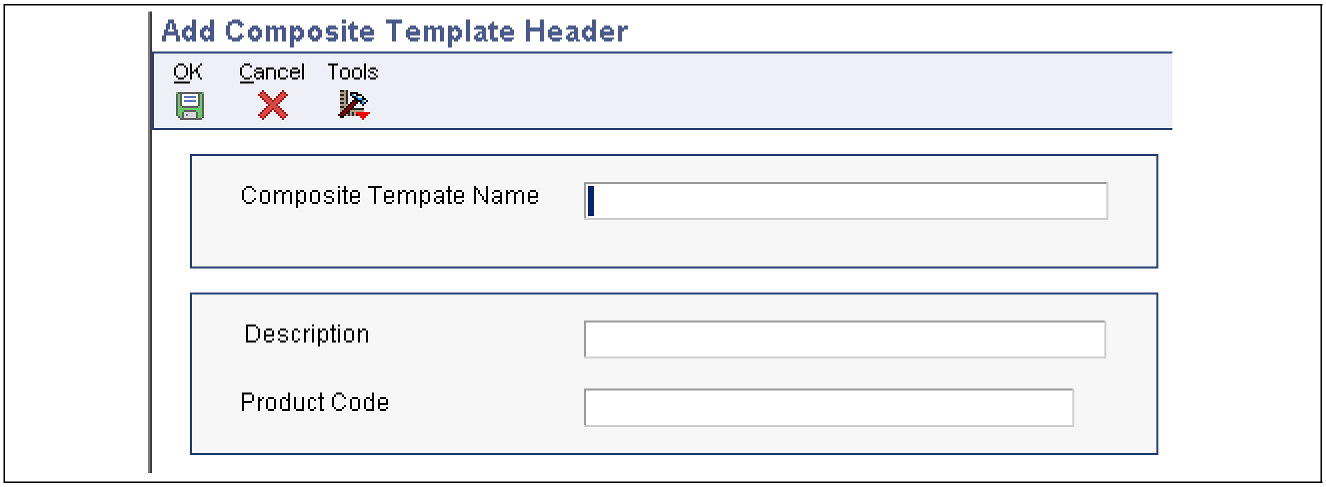
MM: Mail Merge

Creating a New Composite Template

Access the Add Composite Template Header form.

1. Enter template information and then click OK.
2. On Work With Composite Template Headers, select the template you just created and then select View Details from the Row menu.
3. On Work With Composite Template Details, click the visual assist at the Template ID field to display the Simple Template Search and Select form.
4. Find and select the simple template you want to include in the composite template.
5. Repeat steps 3 and 4 to add more simple templates to your composite template.
6. On Work With Composite Template Details, enter sequence numbers for each of the simple templates you have selected for your composite template.

7. When you are finished creating the template, click OK to exit the Work With Composite Template Details form.
8. On Work With Composite Template Headers, select Change Status from the Row menu to make the template active.



Add Composite Template Header form

Composite Template Name	Enter a name for the composite template.
Description	Enter a brief description of the template contents.
Product Code	Enter the product that is associated with the template.

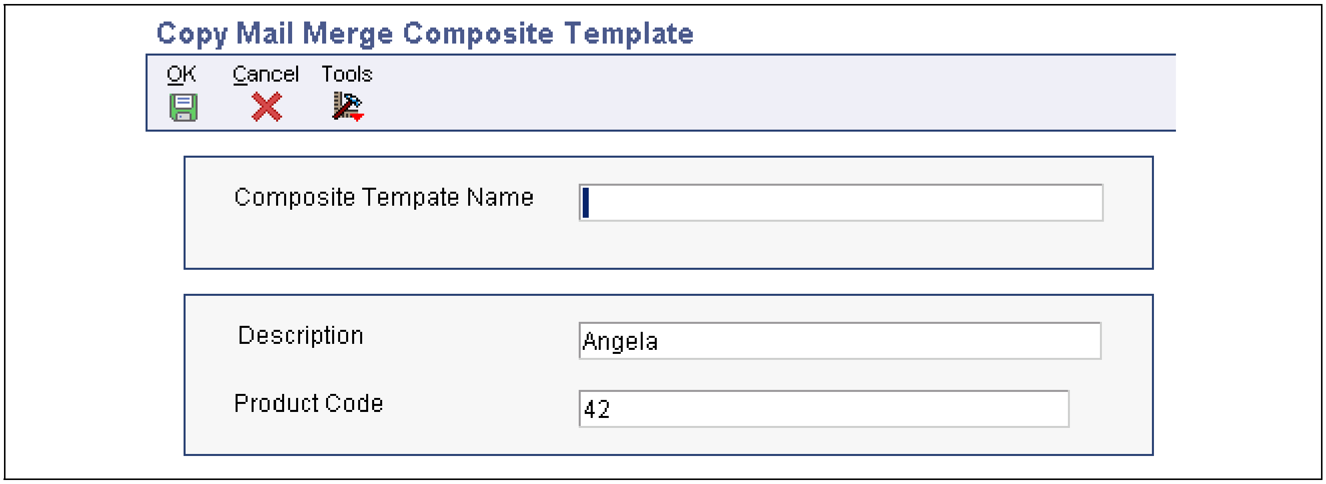
Copying a Simple or Composite Template

Access the Work with Simple Template Headers or Work with Composite Template Headers form.

1. Find and select on the grid the template you want to copy.

   Do not click the Select button.
2. Click Copy.
3. If you are copying a simple template, enter the template ID and template version for the new template you are creating on Copy Mail Merge Simple Template.

   If you are copying a composite template, enter the composite template name, description, and product code for the new template you are creating on Copy Mail Merge Simple Template.
4. Click OK when you are finished copying the template.



Copy Template form

Modifying Proposal Templates

This section provides an overview of modifying existing proposal templates and discusses the following:

- Modifying or deleting a simple template.
- Modifying or deleting a composite template.

Understanding Template Modification

Although you have the option to modify or delete document template parts, keep in mind that modifying or deleting affects all templates that use those parts. For example, if you delete a product image, the image will be unavailable in all templates that formerly included that image.

Similarly, if you modify a document template, the change will affect all users of that template. Make sure that the modifications you want to make will not adversely affect other users of the template. If so, you can leave the template unmodified and instead create a new template that contains the modifications you have in mind

You should also exercise caution when deleting a document template, because a deleted template becomes unavailable to all users.

If an existing template is reasonably close to the template you want to create or contains a majority of the document parts you plan to use, it might be easier to copy an existing template, rename it, and modify it rather than creating a new template from scratch. For example, you might have a detailed proposal template you could use as the basis for creating a summary template.

To modify or delete a template, you use the same forms you used to create simple or composite templates.

Modifying or Deleting a Simple Template

Access the Work with Simple Template Headers form.

1. Find and select on the grid the template you want to modify.

   Do not click the Select button.

2. Use the form grid to change the template ID, description, creator, product code, data set name, template type, or task status.

   You can also change the status by selecting Change Status from the Row menu.
3. To delete the template, select the grid the template you want to delete, and then click Delete.
4. Click Close when you are finished modifying or deleting simple templates.

Modifying or Deleting a Composite Template

Access the Work With Composite Template Headers form.

1. Find and select on the grid the template you want to modify.

   Do not click the Select button.
2. To add, remove, or reorder parts, select View Details from the Row menu to display the Work With Composite Template Details form.
3. Select on the grid any parts that you want to delete, and then click the Delete button.
4. To add a part, select a blank line on the grid and then click the visual assist button at the Template ID field.
5. On Simple Template Search and Select, find and select the part you want to add.
6. Enter the new part's sequence number.

   Repeat these steps to add additional parts.
7. If desired, arrange the sequence of any parts.
8. When you are finished modifying composite templates, click OK to exit from Work With Composite Template Details.
9. To delete a composite template, on Work With Composite Template Headers find and select on the grid the template you want to delete.
10. Click Delete, and then confirm the deletion.
11. When you are finished modifying and deleting composite templates, click Close to exit from Work With Composite Template Headers.

Creating Proposals

This section provides an overview of creating a proposal and discusses the following:

- Setting processing options for the Proposal Generation wizard.
- Running the Proposal Generation wizard.

Understanding Proposal Creation

The proposal generation feature uses a wizard that walks you through the process of creating the proposal. After you have provided enough information for the system to create the proposal, you can associate the proposal with a sales order.

Here are the basic steps involved in generating a proposal:

1. Select the document template.

2. Select the parts or components of the document template to include in the generated proposal.

   You can include some or all of the template's available parts.

3. Change the sequence of the document parts, if necessary.

   To include a document part on a different area of the generated document, you can easily change the part's sequence.

4. Preview the generated proposal in PDF format.

   This is exactly what the proposal will look like when it is generated.

5. Confirm that you want to associate the generated proposal with the current sales order.

Generated proposals are saved as media object attachments for sales orders, so you can view or print them at a later date.

Forms Used to Create a Proposal

Form Name	Form ID	Navigation	Usage
Sales Order - Manage Existing Order	W42101C	EnterpriseOne Menu, Customer Relationship Management, Sales Force Automation, Daily Sales Force Automation Processing (G90CA01), Sales Order.	Entry point for the Proposal Generation wizard.
Proposal Generation Wizard	W90CA24B	On Sales Order - Manage Existing Order, select from the Row menu Order, Generate Proposal.	Find and select an existing proposal template.

Running the Proposal Generation Wizard

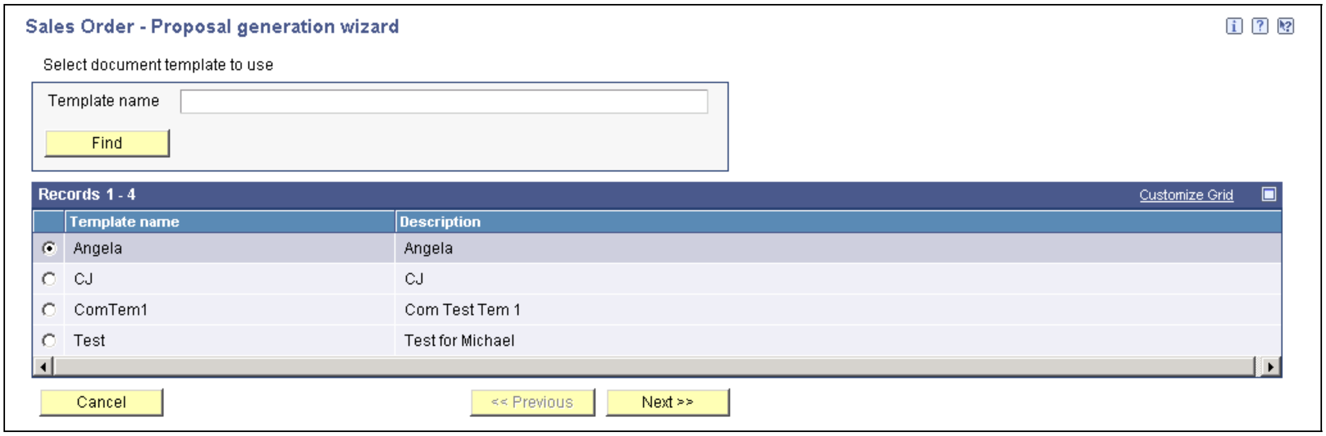
Access the Sales Order Management - Manage Existing Order form.

1. Find and select the sales order for which you want to generate the proposal.
2. Select Generate Proposal from the Row menu to launch the Proposal Generation wizard.
3. Find and select the composite template to generate the proposal.

   Note that only active composite templates will be displayed.

4. Click Next to continue.
5. For each document part (that is, a simple template) to include on the proposal, click Enabled and specify the sequence number.
6. Click Next to generate and preview the document.
7. When the generated doc appears in PDF format, click Finish to complete the proposal generation process.

   To make changes before finalizing the process, click Previous to return to the appropriate screen.



Proposal Generation wizard

To view the generated proposal, you can do so from the Manage Existing Order form by selecting Order, Header Attachments from the Row menu.

See *PeopleSoft EnterpriseOne Tools 8.94 Foundation PeopleBook*

Glossary of PeopleSoft Terms

activity — A scheduling entity in PeopleSoft EnterpriseOne Form Design Aid that represents a designated amount of time on a calendar.

activity rule — The criteria by which an object progresses from one given point to the next in a flow.

add mode — A condition of a form that enables users to input data.

Advanced Planning Agent (APAg) — A PeopleSoft EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of rational databases, flat file format, and other data or message encoding, such as XML.

application server — A server in a local area network that contains applications shared by network clients.

as if processing — A process that enables you to view currency amounts as if they were entered in a currency different from the domestic and foreign currency of the transaction.

alternate currency — A currency that is different from the domestic currency (when dealing with a domestic-only transaction) or the domestic and foreign currency of a transaction.

In PeopleSoft EnterpriseOne Financial Management, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued.

as of processing — A process that is run as of a specific point in time to summarize transactions up to that date. For example, you can run various PeopleSoft EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.

back-to-back process — A process in PeopleSoft EnterpriseOne Workflow Management that contains the same keys that are used in another process.

batch processing — A process of transferring records from a third-party system to PeopleSoft EnterpriseOne.

In PeopleSoft EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than EnterpriseOne to PeopleSoft EnterpriseOne Accounts Receivable and PeopleSoft EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to PeopleSoft EnterpriseOne.

batch server — A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications.

batch-of-one immediate — A transaction method that enables a client application to perform work on a client workstation, then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks.

See also direct connect and store-and-forward.

business function — A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable them to be called from a form, a database trigger, or a non-EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules, and other components to make up an application. Business functions can be created through event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.

business function event rule See named event rule (NER).

business view A means for selecting specific columns from one or more PeopleSoft EnterpriseOne tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data.

central objects merge A process that blends a customer's modifications to the objects in a current release with objects in a new release.

central server A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical PeopleSoft EnterpriseOne installation, the software is loaded on to one machine—the central server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server.

charts Tables of information in PeopleSoft EnterpriseOne that appear on forms in the software.

connector Component-based interoperability model that enables third-party applications and PeopleSoft EnterpriseOne to share logic and data. The PeopleSoft EnterpriseOne connector architecture includes Java and COM connectors.

contra/clearing account A general ledger account in PeopleSoft EnterpriseOne Financial Management that is used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations in PeopleSoft EnterpriseOne General Accounting.

Control Table Workbench An application that, during the installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables.

control tables merge A process that blends a customer's modifications to the control tables with the data that accompanies a new release.

cost assignment The process in PeopleSoft EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.

cost component In PeopleSoft EnterpriseOne Manufacturing Management, an element of an item's cost (for example, material, labor, or overhead).

cross segment edit A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.

currency restatement The process of converting amounts from one currency into another currency, generally for reporting purposes. You can use the currency restatement process, for example, when many currencies must be restated into a single currency for consolidated reporting.

database server A server in a local area network that maintains a database and performs searches for client computers.

Data Source Workbench An application that, during the Installation Workbench process, copies all data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the System-release number data source. It also updates the Data Source Plan detail record to reflect completion.

date pattern	A calendar that represents the beginning date for the fiscal year and the ending date for each period in that year in standard and 52-period accounting.
denominated-in currency	The company currency in which financial reports are based.
deployment server	A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.
detail information	Information that relates to individual lines in PeopleSoft EnterpriseOne transactions (for example, voucher pay items and sales order detail lines).
direct connect	A transaction method in which a client application communicates interactively and directly with a server application. See also batch-of-one immediate and store-and-forward.
Do Not Translate (DNT)	A type of data source that must exist on the iSeries because of BLOB restrictions.
dual pricing	The process of providing prices for goods and services in two currencies.
edit code	A code that indicates how a specific value for a report or a form should appear or be formatted. The default edit codes that pertain to reporting require particular attention because they account for a substantial amount of information.
edit mode	A condition of a form that enables users to change data.
edit rule	A method used for formatting and validating user entries against a predefined rule or set of rules.
Electronic Data Interchange (EDI)	An interoperability model that enables paperless computer-to-computer exchange of business transactions between PeopleSoft EnterpriseOne and third-party systems. Companies that use EDI must have translator software to convert data from the EDI standard format to the formats of their computer systems.
embedded event rule	An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with the business function event rule.
Employee Work Center	A central location for sending and receiving all PeopleSoft EnterpriseOne messages (system and user generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages.
enterprise server	A server that contains the database and the logic for PeopleSoft EnterpriseOne or PeopleSoft World.
EnterpriseOne object	A reusable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects.
EnterpriseOne process	A software process that enables PeopleSoft EnterpriseOne clients and servers to handle processing requests and run transactions. A client runs one process, and servers can have multiple instances of a process. PeopleSoft EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy.
Environment Workbench	An application that, during the Installation Workbench process, copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the System-release number data source. It also updates the Environment Plan detail record to reflect completion.
escalation monitor	A batch process that monitors pending requests or activities and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.

event rule	A logic statement that instructs the system to perform one or more operations based on an activity that can occur in a specific application, such as entering a form or exiting a field.
facility	An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. A facility is sometimes referred to as a *business unit* .
fast path	A command prompt that enables the user to move quickly among menus and applications by using specific commands.
file server	A server that stores files to be accessed by other computers on the network. Unlike a disk server, which appears to the user as a remote disk drive, a file server is a sophisticated device that not only stores files, but also manages them and maintains order as network user request files and make changes to these files.
final mode	The report processing mode of a processing mode of a program that updates or creates data records.
FTP server	A server that responds to requests for files via file transfer protocol.
header information	Information at the beginning of a table or form. Header information is used to identify or provide control information for the group of records that follows.
interface table	See Z tables.
integration server	A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems.
integrity test	A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.
interoperability model	A method for third-party systems to connect to or access PeopleSoft EnterpriseOne.
in-your-face-error	In PeopleSoft EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.
IServer service	Developed by PeopleSoft, this internet server service resides on the web server and is used to speed up delivery of the Java class files from the database to the client.
jargon	An alternative data dictionary item description that PeopleSoft EnterpriseOne or People World displays based on the product code of the current object.
Java application server	A component-based server that resides in the middle-tier of a server-centric architecture. This server provides middleware services for security and state maintenance, along with data access and persistence.
JDBNET	A database driver that enables heterogeneous servers to access each other's data.
JDEBASE Database Middleware	A PeopleSoft proprietary database middleware package that provides platform-independent APIs, along with client-to-server access.
JDECallObject	An API used by business functions to invoke other business functions.
jde.ini	A PeopleSoft file (or member for iSeries) that provides the runtime settings required for EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running PeopleSoft EnterpriseOne. This includes workstations and servers.
JDEIPC	Communications programming tools used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.

jde.log	The main diagnostic log file of PeopleSoft EnterpriseOne. This file is always located in the root directory on the primary drive and contains status and error messages from the startup and operation of PeopleSoft EnterpriseOne.
JDENET	PeopleSoft proprietary communications middleware package. This package is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all PeopleSoft EnterpriseOne supported platforms.
Location Workbench	An application that, during the Installation Workbench process, copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the System data source.
logic server	A server in a distributed network that provides the business logic for an application program. In a typical configuration, pristine objects are replicated on to the logic server from the central server. The logic server, in conjunction with workstations, actually performs the processing required when PeopleSoft EnterpriseOne and World software runs.
MailMerge Workbench	An application that merges Microsoft Word 6.0 (or higher) word-processing documents with PeopleSoft EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.
master business function (MBF)	An interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables. These master functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. MBFs contain logic that ensures the integrity of adding, updating, and deleting information from databases.
master table	See published table.
matching document	A document associated with an original document to complete or change a transaction. For example, in PeopleSoft EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher.
media storage object	Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.
message center	A central location for sending and receiving all PeopleSoft EnterpriseOne messages (system and user generated), regardless of the originating application or user.
messaging adapter	An interoperability model that enables third-party systems to connect to PeopleSoft EnterpriseOne to exchange information through the use of messaging queues.
messaging server	A server that handles messages that are sent for use by other programs using a messaging API. Messaging servers typically employ a middleware program to perform their functions.
named event rule (NER)	Encapsulated, reusable business logic created using event rules, rather that C programming. NERs are also called business function event rules. NERs can be reused in multiple places by multiple programs. This modularity lends itself to streamlining, reusability of code, and less work.
nota fiscal	In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.
nota fiscal factura	In Brazil, a nota fiscal with invoice information. See also *nota fiscal.*

Object Configuration Manager (OCM)	In PeopleSoft EnterpriseOne, the object request broker and control center for the runtime environment. OCM keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, OCM directs access to it using defaults and overrides for a given environment and user.
Object Librarian	A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-in capabilities for developers, and it controls the creation, modification, and use of PeopleSoft EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another.
Object Librarian merge	A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.
Open Data Access (ODA)	An interoperability model that enables you to use SQL statements to extract PeopleSoft EnterpriseOne data for summarization and report generation.
Output Stream Access (OSA)	An interoperability model that enables you to set up an interface for PeopleSoft EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.
package	EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where on the deployment server the installation program can find them. It is point-in-time snap shot of the central objects on the deployment server.
package build	A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in PeopleSoft EnterpriseOne, a package build can be a compiled version of the software. When you upgrade your version of the ERP software, for example, you are said to take a package build. Consider the following context: “Also, do not transfer business functions into the production path code until you are ready to deploy, because a global build of business functions done during a package build will automatically include the new functions.” The process of creating a package build is often referred to, as it is in this example, simply as “a package build.”
package location	The directory structure location for the package and its set of replicated objects. This is usually \\deployment server\release\path_code\package\package name. The subdirectories under this path are where the replicated objects for the package are placed. This is also referred to as where the package is built or stored.
Package Workbench	An application that, during the Installation Workbench process, transfers the package information tables from the Planner data source to the System-release number data source. It also updates the Package Plan detail record to reflect completion.
PeopleSoft Database	See JDEBASE Database Middleware.
planning family	A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.
preference profile	The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups.
print server	The interface between a printer and a network that enables network clients to connect to the printer and send their print jobs to it. A print server can be a computer, separate hardware device, or even hardware that resides inside of the printer itself.
pristine environment	A PeopleSoft EnterpriseOne environment used to test unaltered objects with PeopleSoft demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify.

processing option	A data structure that enables users to supply parameters that regulate the running of a batch program or report. For example, you can use processing options to specify default values for certain fields, to determine how information appears or is printed, to specify date ranges, to supply runtime values that regulate program execution, and so on.
production environment	A PeopleSoft EnterpriseOne environment in which users operate EnterpriseOne software.
production-grade file server	A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.
program temporary fix (PTF)	A representation of changes to PeopleSoft software that your organization receives on magnetic tapes or disks.
project	In PeopleSoft EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.
promotion path	The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path): 11>21>26>28>38>01 In this path, *11* equals new project pending review, *21* equals programming, *26* equals QA test/review, *28* equals QA test/review complete, *38* equals in production, *01* equals complete. During the normal project promotion cycle, developers check objects out of and into the development path code and then promote them to the prototype path code. The objects are then moved to the productions path code before declaring them complete.
proxy server	A server that acts as a barrier between a workstation and the internet so that the enterprise can ensure security, administrative control, and caching service.
published table	Also called a master table, this is the central copy to be replicated to other machines. Residing on the publisher machine, the F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
publisher	The server that is responsible for the published table. The F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
pull replication	One of the PeopleSoft methods for replicating data to individual workstations. Such machines are set up as pull subscribers using PeopleSoft EnterpriseOne data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the F98DRPCN table.
QBE	An abbreviation for query by example. In PeopleSoft EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.
real-time event	A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and to provide notification to third-party software, end users, and other PeopleSoft systems that have requested notification when certain transactions occur.
refresh	A function used to modify PeopleSoft EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level, such as B73.2 or B73.2.1.
replication server	A server that is responsible for replicating central objects to client machines.
quote order	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

	In PeopleSoft EnterpriseOne Sales Order Management, item and price information for a customer who has not yet committed to a sales order.
selection	Found on PeopleSoft menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
Server Workbench	An application that, during the Installation Workbench process, copies the server configuration files from the Planner data source to the System-release number data source. It also updates the Server Plan detail record to reflect completion.
spot rate	An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies.
Specification merge	A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
specification	A complete description of a PeopleSoft EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
Specification Table Merge Workbench	An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.
store-and-forward	The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions.
subscriber table	Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.
supplemental data	Any type of information that is not maintained in a master file. Supplemental data is usually additional information about employees, applicants, requisitions, and jobs (such as an employee’s job skills, degrees, or foreign languages spoken). You can track virtually any type of information that your organization needs. For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and Supplier Master tables), you can maintain other kinds of data in separate, generic databases. These generic databases enable a standard approach to entering and maintaining supplemental data across PeopleSoft EnterpiseOne systems.
table access management (TAM)	The PeopleSoft EnterpriseOne component that handles the storage and retrieval of use-defined data. TAM stores information, such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.
Table Conversion Workbench	An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.
table conversion	An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.
table event rules	Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although PeopleSoft EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.
terminal server	A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer.

three-tier processing	The task of entering, reviewing and approving, and posting batches of transactions in PeopleSoft EnterpriseOne.
three-way voucher match	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records to create vouchers.
transaction processing (TP) monitor	A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and may include programs that validate data and format terminal screens.
transaction set	An electronic business transaction (electronic data interchange standard document) made up of segments.
trigger	One of several events specific to data dictionary items. You can attach logic to a data dictionary item that the system processes automatically when the event occurs.
triggering event	A specific workflow event that requires special action or has defined consequences or resulting actions.
two-way voucher match	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.
User Overrides merge	Adds new user override records into a customer's user override table.
variance	In Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment. In EnterpriseOne Project Costing and EnterpriseOne Manufacturing Management, the difference between two methods of costing the same item (for example, the difference between the frozen standard cost and the current cost is an engineering variance). Frozen standard costs come from the Cost Components table, and the current costs are calculated using the current bill of material, routing, and overhead rates.
Version List merge	The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release, as well as their processing options data.
visual assist	Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.
vocabulary override	An alternate description for a data dictionary item that appears on a specific PeopleSoft EnterpriseOne or World form or report.
wchar_t	An internal type of a wide character. It is used for writing portable programs for international markets.
web application server	A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.
web server	A server that sends information as requested by a browser, using the TCP/IP set of protocols. A web server can do more than just coordination of requests from browsers; it can do anything a normal server can do, such as house applications or data. Any computer can be turned into a web server by installing server software and connecting the machine to the internet.
Windows terminal server	A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.

work day calendar	In EnterpriseOne Manufacturing Management, a calendar that is used in planning functions that consecutively lists only working days so that component and work order scheduling can be done based on the actual number of work days available. A work day calendar is sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar.
workflow	The automation of a business process, in whole or in part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.
workgroup server	A server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing.
XAPI events	A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and then calls third-party software, end users, and other PeopleSoft systems that have requested notification when the specified transactions occur to return a response.
XML CallObject	An interoperability capability that enables you to call business functions.
XML Dispatch	An interoperability capability that provides a single point of entry for all XML documents coming into PeopleSoft EnterpriseOne for responses.
XML List	An interoperability capability that enables you to request and receive PeopleSoft EnterpriseOne database information in chunks.
XML Service	An interoperability capability that enables you to request events from one PeopleSoft EnterpriseOne system and receive a response from another PeopleSoft EnterpriseOne system.
XML Transaction	An interoperability capability that enables you to use a predefined transaction type to send information to or request information from PeopleSoft EnterpriseOne. XML transaction uses interface table functionality.
XML Transaction Service (XTS)	Transforms an XML document that is not in the PeopleSoft EnterpriseOne format into an XML document that can be processed by PeopleSoft EnterpriseOne. XTS then transforms the response back to the request originator XML format.
Z event	A service that uses interface table functionality to capture PeopleSoft EnterpriseOne transactions and provide notification to third-party software, end users, and other PeopleSoft systems that have requested to be notified when certain transactions occur.
Z table	A working table where non-PeopleSoft EnterpriseOne information can be stored and then processed into PeopleSoft EnterpriseOne. Interface tables also can be used to retrieve PeopleSoft EnterpriseOne data. Interface tables are also known as interface tables.
Z transaction	Third-party data that is properly formatted in interface tables for updating to the PeopleSoft EnterpriseOne database.

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