

PeopleSoft®

PeopleSoft EnterpriseOne Customer
Relationship Management Application
Fundamentals 8.11 SP1 PeopleBook

August 2005

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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.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

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 peoplebookspres@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

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft 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: <i>Blank:</i> Batch is unposted and pending approval. <i>A:</i> The batch is approved for posting, has no errors and is in balance, but it has not yet been posted. <i>D:</i> The batch posted successfully. <i>E:</i> The batch is in error. You must correct the batch before it can post. <i>P:</i> 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. <i>U:</i> 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	<p>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.</p> <p>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.</p> <p>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.</p>
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	<p>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> <p><i>P</i>: Accounts payable documents.</p> <p><i>R</i>: Accounts receivable documents.</p> <p><i>T</i>: Time and pay documents.</p> <p><i>I</i>: Inventory documents.</p> <p><i>O</i>: Purchase order documents.</p> <p><i>S</i>: Sales order documents.</p>
Effective Date	<p>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:</p> <ul style="list-style-type: none">• 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 Foundation

Common Elements Used in This PeopleBook

Address Type	Enter the code that tells the system to use this address as a sold to (bill to) address, a ship to address, or both. Codes are: <i>X</i> : Bill to and ship to address <i>S</i> : Ship to address only <i>B</i> : 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	Displays the code that identifies the currency for the transaction, opportunity, or sales order.
Electronic Address	Enter the customer's email address or Uniform Resource Locator (URL). <hr/> Note. For Electronic Address Type W - Internal email (Work Center), the Electronic Address field must be blank. <hr/>
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 Customer Relationship Management Application Fundamentals

This chapter discusses:

- CRM application fundamentals overview.
- CRM Foundation business processes.
- CRM Foundation integrations.
- (Rapid Start USA) CRM Application Fundamentals business processes.
- CRM Foundation implementation.

CRM Application Fundamentals Overview

This guide discusses the PeopleSoft EnterpriseOne Customer Relationship Management Foundation system, and how the applications in this system provide the basis for all customer relationship management (CRM) business processes that the organization uses. To use any of the PeopleSoft EnterpriseOne Customer Relationship Management products, including Sales Force Automation, Case Management, and Service Management, you must also use the Customer Relationship Management Foundation system.

You can use the Customer Relationship Management Foundation system to perform the these tasks:

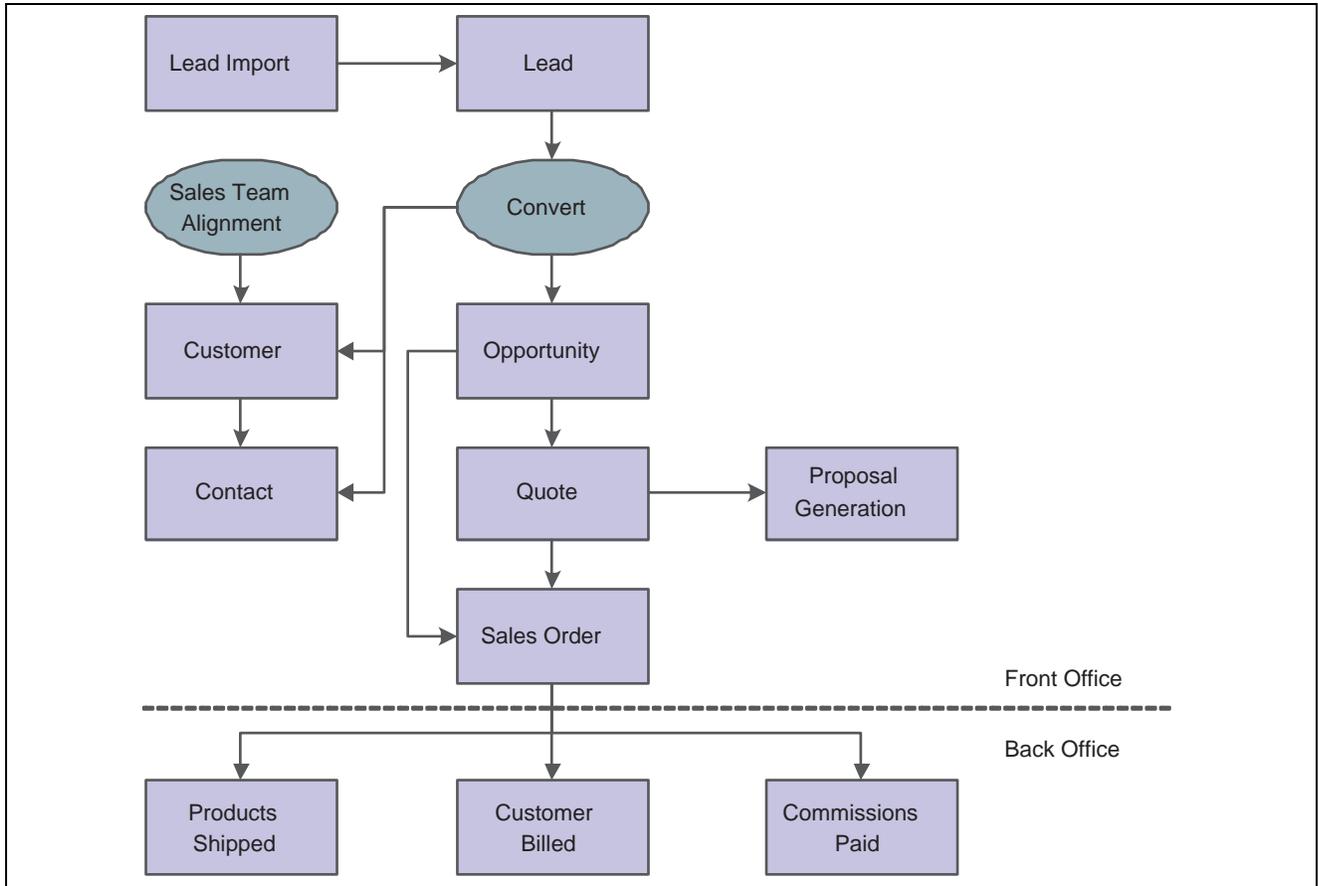
- Set up CRM constants, which are used to determine how the system processes CRM information.
- Enter CRM information for employees, customers, contacts, and partners.

You can enter and maintain employees, customers, contacts, and partners using CRM applications. You can also manage and maintain CRM information for employees, customers, and partners that were entered into the system using applications from other PeopleSoft EnterpriseOne products.

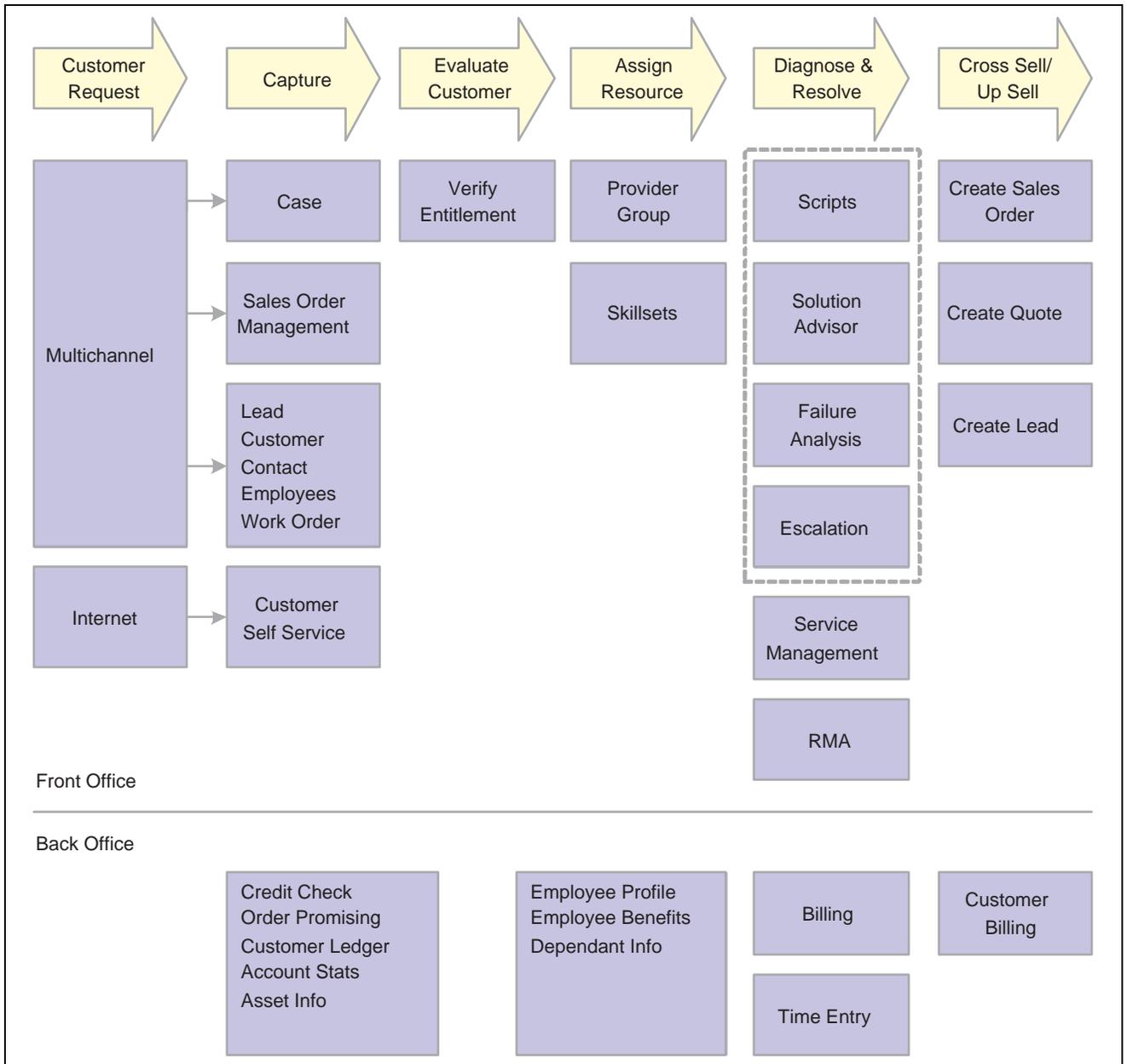
- Enter and maintain product item and item catalogs, which can be used in sales, service, and support business processes.
- Generate customized proposal documents for customers and prospects.
- Set up email lists, and use email merge functionality to communicate similar information to large groups of people.
- Create call plans to assist service and support employees.

CRM Foundation Business Processes

The Customer Relationship Management Foundation system provides the basis for these business processes:



Lead to cash business process



Request to resolve business process

CRM Foundation Integrations

The Customer Relationship Management Foundation system integrates with these PeopleSoft EnterpriseOne systems:

- Address Book.
- Customer Relationship Management systems.

Address Book

The Customer Relationship Management Foundation system integrates closely with the PeopleSoft 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.

Customer Relationship Management Systems

The Customer Relationship Management Foundation system provides the basis for these CRM systems:

- Branch Scripting
- Case Management
- Sales Force Automation
- Service Management
- Solution Advisor

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

(Rapid Start CAN and USA) CRM Application Fundamentals Business Processes

Rapid Start for the United States includes all the functionality available in the PeopleSoft EnterpriseOne systems to perform business processes. For the CRM Application Fundamentals system, Rapid Start also includes preconfigured data that is specifically set up for the qualify opportunities business process.

See *PeopleSoft EnterpriseOne Rapid Start Fundamentals 8.11 SP1 PeopleBook*, “Getting Started with Rapid Start”.

This table lists the business processes, scenarios, and process steps for CRM Application Fundamentals and refers you to the detailed information for each business process. The information in this table applies to Canada and the United States:

Business Process	Scenario	Process Steps	Reference
Qualify opportunities.	Review credit to convert a prospect to a customer.	Review credit.	See Chapter 5, “Managing Customer Information,” (Rapid Start CAN and USA) Reviewing Credit and Converting Prospects to Customers, page 66.
Qualify opportunities.	Review the opportunity pipeline to see potential revenue.	Review the opportunity pipeline.	See Chapter 5, “Managing Customer Information,” (Rapid Start CAN and USA) Reviewing the Opportunity Pipeline, page 71.

CRM Foundation Implementation

This section provides an overview of the steps that are required to implement the Customer Relationship Management 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.	<i>PeopleSoft EnterpriseOne Tools 8.95 Foundation PeopleBook</i>
2. Set up companies, fiscal date patterns, and business units.	<i>PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 SP1 PeopleBook, “Setting Up Organizations”</i>
3. (Optional) Set up accounts, and the chart of accounts.	<i>PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 SP1 PeopleBook, “Creating the Chart of Accounts”</i>
4. (Optional) Set up the General Accounting constants.	<i>PeopleSoft EnterpriseOne General Accounting 8.11 SP1 PeopleBook, “Setting Up the General Accounting System”</i>
5. (Optional) Set up multicurrency processing, including currency codes and exchange rates.	<ul style="list-style-type: none"> <i>PeopleSoft EnterpriseOne Multicurrency Processing 8.11 SP1 PeopleBook, “Setting Up General Accounting for Multicurrency Processing”</i> <i>PeopleSoft EnterpriseOne Multicurrency Processing 8.11 SP1 PeopleBook, “Setting Up Exchange Rates”</i>
6. (Optional) Set up ledger type rules.	<i>PeopleSoft EnterpriseOne General Accounting 8.11 SP1 PeopleBook, “Setting Up the General Accounting System,” Setting Up Ledger Type Rules for General Accounting</i>

Step	Reference
7. Set up branch/plant constants.	<i>PeopleSoft EnterpriseOne Inventory Management 8.11 SPI PeopleBook</i> , “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.	<u>Chapter 3, “Setting Up CRM Constants and Employees,” page 15</u>

CHAPTER 2

Understanding CRM Fundamentals

This chapter provides overviews of:

- PeopleSoft EnterpriseOne Customer Relationship Management Products.
- PeopleSoft EnterpriseOne CRM Fundamentals applications.
- CRM constants.
- Employees.
- Catalogs.
- Customers.
- Partners.
- Contacts.
- Call plans.
- Email and mail merge.
- Proposal generation.
- Hotkeys for CRM Foundation.

Understanding PeopleSoft EnterpriseOne Customer Relationship Management Products

PeopleSoft EnterpriseOne Customer Relationship Management products are a set of customer life cycle management applications that enable you to create a complete view of each customer. These applications help you build strong relationships, which are the key to obtaining customer loyalty. PeopleSoft EnterpriseOne Customer Relationship Management applications help you manage customer information in these ways:

- Sales Force Automation applications let you manage accounts, leads, contacts, opportunities and competitors; plan and execute sales strategies; and forecast more effectively.

The ability to track and analyze all aspects of the sales cycle enables organizations to sell more effectively to each customer, which can lead to greater customer satisfaction.

- Case Management and Service Management applications enable you to track all aspects of each customer's service and support needs.

Using cases and work orders, you can track and manage the specific details of each service or support request that customers initiate. You can also use additional systems to resolve cases and work orders efficiently, such as:

- Solution Advisor

- Branch Scripting

The Sales Force Automation, Case Management, and Service Management systems enable organizations to satisfy a customer's needs through all phases of these business processes:

- Sales Force Automation – Lead to Order.
- Case Management – Request to Resolve.
- Service Management – Install to Maintain.

To successfully complete these business processes, you must first set up the CRM Foundation system, which provides the basis for all CRM-related business processes in EnterpriseOne.

Understanding PeopleSoft EnterpriseOne CRM Fundamentals Applications

The PeopleSoft EnterpriseOne Customer Relationship Management applications help companies manage the entire customer life cycle, from acquiring new customers to post-sales service and support. The PeopleSoft EnterpriseOne CRM Foundation system includes these features:

- Item entry, maintenance, and inquiry.
- Item cataloging.
- Contact entry and maintenance.
- Customer entry and maintenance.
- Employee entry and maintenance.
- Email and email merge functionality.
- Call plan creation and maintenance.
- Partner entry and maintenance.
- Proposal generation.

The PeopleSoft EnterpriseOne CRM Foundation applications are integrated with other PeopleSoft EnterpriseOne applications, which reduces or eliminates redundant data entry. For example, customers, employees, and partners that are entered using the Address Book program (P01012) are accessible from CRM-related employee, customer, and partner applications. It is not necessary to reenter data into the system to create CRM records.

Understanding CRM Constants

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.

Understanding Employees

You use the Employee Detail program (P90CA040) and the Employee Processing Options program (P90CA043) to enter and maintain all CRM-related information about employees. When you set up employees, you can enter sales, service, and support information that is used by the CRM applications.

Understanding Catalogs

The Item Catalog program (P90CA106) enables you to categorize items into similar groups, or catalogs. You can also use catalogs to add items to a sales order, quote, opportunity, or lead.

The Item Catalog program enables you to:

- 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 CRM Customer Detail program (P90CA080) enables you to enter and modify all CRM-related customer information from one entry point. If a selected customer record has subordinate records, you can click the Parent Child Hierarchy link to view the parent and child records.

You use the CRM Customer Detail program to enter, review and maintain customer information, such as:

- Contacts, addresses and phones.
- Financial data.
- Shipping and billing options and preferences.
- Service and support information, including contracts, work orders, and maintenance requests.
- Sales information, including sales teams, quotes, sales orders, and opportunities.
- Activities and action plans.

Understanding Partners

You use the Address Book program (P01012) to enter partner information. A CRM-related version of this program exists on the CRM Foundation Daily Processing menu (G90C01), which enables you to easily access partner information while performing CRM-related tasks. After you create partner records, you can associate those partners with customers, employees, items, sales leads, cases, opportunities, or activities. Tracking partner information enables you to:

- View partners who are currently, or were 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 addresses, phones, contacts, notes and attachments.

Understanding Contacts

The CRM Contact program (P90CA070) enables you to track information about contact people who are associated with partners, customers, and competitors. Using the CRM Contact program, you can access the Email Merge and Mail Merge features, which enable you to create personalized letters or electronic messages for selected contacts. Before you can use either of these features, you must create at least one contact.

The CRM Contact program enables you to:

- View or modify detail information, such as addresses, phones and related people.
- View or modify activity and email information.
- View or modify opportunity, pipeline, quote, or sales order information.
- View or modify information about cases associated with the contact.
- Enter, view or modify attachments for the contact.

Understanding Call Plans

You can use the Activity (P01301) and Action Plan (P01401) programs to create call plans. Call plans provide sales representatives with templates that contain question prompts, goals, and reminders about the type of sales call on which they are working.

You can associate a call plan template with an activity or an action plan. When viewing the call plan form from either the activity or action plan, you can change the templates that are associated with the call plan. For example, when speaking with a customer you might think of additional questions you would like to ask that are specific to this customer. You can add the questions and save the updated template. When you save the changes, the system creates a copy of the original call plan template, and associates it with the activity or action plan. The original call plan template is not affected.

Understanding Email and Mail Merge

You use the Class Email program (P90CA500) to send email messages to groups or individuals without using a separate email program such as Microsoft Outlook or Lotus Notes. You can create and save messages to send at a later date and time, and you can select the recipients from available contact records.

You can also create email groups comprised of individuals with similar characteristics. For example, you might create groups for customers, partners, or employees in a department. As business needs change, you can modify email groups.

You can also use the Email Merge and Mail Merge features to create personalized letters or electronic messages. The mail merge feature is driven by a wizard that enables you to select a template and customize it for the mailing. These merge features enable you to create personalized communications that automatically retrieve information such as the recipient's name and address from the PeopleSoft EnterpriseOne system.

Understanding Proposal Generation

You can use the proposal generation feature to produce customized letters and sales proposals. This feature enables you to mix and match predefined document components, which contain links to data that is stored in PeopleSoft EnterpriseOne tables. You specify the components, and the order in which they appear, and the system generates customized documents based on the component setup. For example, you can create a customized letter for each customer that contains the 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, you can generate a proposal that include the address to which the customer's last order was shipped, the estimated or actual order start dates, and any special delivery instructions the customer has specified.

To supplement the templates that the PeopleSoft system provides, you can create new templates. Before you create a template, you must create the document parts, or components, that are used in the template. Components can consist of text and images. You then create a template by attaching components. As needs change, you can modify or delete templates.

If you generate a proposal directly from a quote order or sales order, the system attaches the proposal to the order as a media objects. You can make proposals available online, email the proposal, or print the proposal.

You use these programs to create and maintain proposals:

- Mail Merge and Doc Generation Maintenance Application program (P980040).
- Create MailMerge Documents program (P980013).
- Maintain MailMerge Documents program (P980014).
- MailMerge Documents Search and Select program (P980014S).

Understanding Hotkeys for CRM Foundation

You can navigate and interact with PeopleSoft EnterpriseOne applications using hotkeys for quicker, more efficient workflow. Hotkeys are designed to work in conjunction with the browser's existing hotkeys, and enable you to work solely using the keyboard.

There are several hotkeys that you can use to navigate through all PeopleSoft EnterpriseOne applications. For example, you can hit the tab key on the keyboard to move the focus to the next field, button, or hotlink on any PeopleSoft EnterpriseOne form. In addition to those hotkeys, additional hotkeys are available that enable you to use buttons on CRM Foundation forms without using the mouse. To use these hotkeys, you must hold down the Shift and the Control buttons on the keyboard while you press the hotkey. For example, N is the hotkey for the Clear Main Address button. To clear a customer's main address without clicking the Clear Main Address button, you press SHIFT + CTRL + N on the keyboard.

This table lists all of the CRM Foundation hotkeys:

Button	Hotkey
Add Email Group	D
Add External Email	L
Add Person	P
Assign City	N
Assign Competitors	N
Assign Industry	N
Assign Opportunity	N
Assign Partners	N
Assign Postal Code	N
Assign Product Interest	N
Assign Sales Team	N
Assign State	N
Back	B
Change Upload	N
Clear Main Address	N
Collapse Hierarchy	Y
Convert Lead	N
Create Email	M

Button	Hotkey
Delete Upload	D
Download Template	L
Email Merge	L
Email Selected Contacts	M
Expand Hierarchy	Y
Finish	N
Link Action Plan	L
Mail Merge	M
Next	N
No	N
Previous	P
Remove Email Group	U
Remove External Email	X
Remove Person	N
Revise	Y
Sales Group Details	L
Select Policy	P
Send Email	M
Set Main Address	M
Upload Template	U
View Envelopes/Labels	B
View Letters	L
Yes	Y

See Also

PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: Foundation

CHAPTER 3

Setting Up CRM Constants and Employees

This chapter provides an overview of Customer Relationship Management (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 for whom you want to process information. 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 CRM-related information, you must set up the CRM_Constants program to define the sales, service, and support features that the organization uses, and how the system processes information. You set up CRM constants once, and these settings are used to process CRM information for each company within the organization.

The CRM Constants program controls:

- 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 the 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. These tables can be configured by the user to store data that is not stored in other PeopleSoft EnterpriseOne tables.

- 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 the 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. The currency code that you enter in the constants is the currency that the system uses to determine the number of gold bars for each customer or opportunity.

- 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 applications. The system adds all activities that are created by or associated with CRM programs to the type of calendar that you specify in the constants. Typically, you select a CRM calendar so that the system adds all CRM-related activities to the CRM Calendar.

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 SPI PeopleBook, “Setting Up Order Processing Information,” Setting Up Commission Information

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

Form Used to Set Up CRM Constants

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

Setting Up CRM Constants

Access the CRM Constants form.

CRM Constants, Process

Select the Process tab.

Implicit Save Enter an option that specifies 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 Enter a constant that specifies 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 select 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

Enter the CRM User Reserved flag that specifies 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. The system uses this currency code to calculate the monetary amount of each opportunity or customer for gold-bar display purposes.

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. The system adds all activities that are created or associated with CRM applications to the calendar type that you specify here.

Selecting a calendar type enables you to differentiate the calendar on which CRM-related activities reside, as compared to other activities. For example, Sarbanes Oxley activities might be on a Finance calendar. The system also uses the calendar type constant to determine which fields a user must complete when creating activities.

Managing CRM Employees

This section provides 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 the 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 employees depends upon the PeopleSoft EnterpriseOne systems that the organization uses. If the organization uses PeopleSoft EnterpriseOne Human Capital Management (HCM), the system creates address book records during the HCM employee entry process. If you do not use PeopleSoft EnterpriseOne Human Capital Management, you can enter employees into the system using the PeopleSoft EnterpriseOne Address Book system.

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. Regardless of which method you use to enter employees, you can use the Employee Detail program to maintain all CRM-related employee information.

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 the 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 or maintain CRM-related employee information, 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. This 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	<p>You can review all of the cases that an employee is associated with. You can use this information to search for cases associated with an employee:</p> <ul style="list-style-type: none"> • Customer number • Site number • Contact number • Equipment number • Case status <p>Case information is located on the Service tab of the Employee - Manage <Employee Name> form.</p>

Type of Information	Description and Location
Opportunities	<p>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:</p> <ul style="list-style-type: none"> • Customer • Sales cycle • Probability of closing • Potential amount <p>Opportunity information is located on the Sales tab of the Employee - Manage <Employee Name> form.</p>
Pipeline	<p>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.</p>
Customers	<p>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.</p>
Parent Child Hierarchy	<p>You can review the parent child relationships for employees within the organization. The system displays, in hierarchical detail, the organizational structure of the selected employees.</p>

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

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 PeopleSoft EnterpriseOne product areas that contain employee information. You can use these links to access, review, and edit these 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 7, “Managing Contacts,” page 87

PeopleSoft EnterpriseOne Customer Relationship Management 8.11 SP1 Sales Applications PeopleBook, “Managing the Sales Force”

PeopleSoft EnterpriseOne Customer Relationship Management 8.11 SP1 Support Applications PeopleBook, “Setting Up Provider Groups”

PeopleSoft EnterpriseOne Human Capital Management Application Fundamentals 8.11 SP1 PeopleBook, “Setting Up Employee Information”

PeopleSoft EnterpriseOne Address Book 8.11 SP1 PeopleBook, “Entering Address Book Records”

PeopleSoft EnterpriseOne Sales Order Management 8.11 SP1 PeopleBook, “Setting Up Order Processing Information,” Setting Up Commission Information

PeopleSoft EnterpriseOne Accounts Payable 8.11 SP1 PeopleBook

PeopleSoft EnterpriseOne Accounts Receivable 8.11 SP1 PeopleBook

Forms Used to Enter Employees for CRM

Form Name	FormID	Navigation	Usage
Search For Employees	W90CA040F	<ul style="list-style-type: none"> CRM Foundation Daily Processing (G90C01), Employee. Periodic Sales Force Automation Processing (G90CA02), Employee. 	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 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 <i>E</i> . 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 to which the employee belongs.
Department	Enter the name of the department in which the employee works.
Industry Classification	<p>Enter the industry code associated with the employee.</p> <p>This code is part of a numerical system that is used in to classifies goods and services. This code can be in the format of these systems of classification:</p> <ul style="list-style-type: none"> • Standard Industrial Classification or North American Industry Classification System. <p>These systems are used by the United States, and codes associated with these systems are between four and six digits.</p> • Harmonized System. <p>The international method of classifying goods. More than fifty countries use this code. It can be up to 10 digits.</p> • Standard Industrial Trade Classification. <p>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.</p> <hr/> <p>Note. This code is not used in the sales force alignment process. You must add the employee to an industry grouping, not an industry classification, to automatically assign the employee to a sales team.</p> <hr/>
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	Displays 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	<p>Enter the desired contact method for the employee. Examples include:</p> <p><i>E</i>: Email</p> <p><i>F</i>: Fax</p> <p><i>C</i>: Phone</p> <p><i>W</i>: Address</p> <p><i>P</i>: Pager</p>

Entering Additional Phone and Email Information for Employees

Access the Employee - Manage <Employee Name> form. Select the Employee link and then click the Phone and E-mail tab.

Employee - Employee - Manage Abrams, Brooke

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
<input type="radio"/>		Business	617	555-1234
<input checked="" type="radio"/>	FAX	FAX	617	555-4000
<input type="radio"/>				

Delete

Electronic Addresses

Records 1 - 2 ⬆ ⬇ ⬇

	Electronic Address	Electronic Address Description	Electronic Address
<input checked="" type="radio"/>	E	Email address	babrams@emailaddress.com
<input type="radio"/>			

Employee - Manage <Employee Name> form: Employee tab: Phones and E-mail link

Setting Up Service Provider Information

Access the Employee - Manage <Employee Name> form. Select the Employee tab and then click the Service Provider link.

Employee - Employee - Manage Abrams, Brooke

Employee
Customer And Partner
Sales
Service
Attachments

[Detail](#) | [Phone and E-mail](#) | **[Service Provider](#)** | [Related Links](#) | [Interactions](#)

Save Changes
Undo Changes
Close

Inactive

Provider Number	<input type="text" value="6044"/>	<i>Abrams, Brooke</i>
ACD Extension	<input type="text" value="1234"/>	
Mail Box Designator	<input type="text"/>	
Pager/E-mail Address	<input type="text" value="babrams@emailaddress.com"/>	
Service Group	<input type="text" value="002"/>	<i>Eastern</i>
Work Center	<input type="text" value="1"/>	<i>Financial/Distribution Company</i>
Time Zone	<input type="text" value="23"/>	<i>Eastern Time (US & Canada)</i>
Daylight Savings Rule	<input type="text" value="USA"/>	

Employee - Manage <Employee Name> form: Employee tab: Service Provider link

- 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** Enter a value that specifies the method that is used when charging customers for services provided by the employee. Values are:
F: One flat rate. Charges for parts are already included in the flat rate.
T: 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	Enter a value that specifies whether the service provider should be paid for parts used during a repair. Values are: <i>Y</i> or <i>I</i> : Pay. <i>N</i> or <i>0</i> : Do not pay.

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.

Display

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

1. **Tax ID (For Future Use)** Specify whether the employee's tax ID is displayed on the employee forms. Values are:

Blank: Display. (Default)
1: Hide.
2: Disable.

Versions

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

- | | |
|--|---|
| <p>1. Address Book (P01012) Version, 2. Customer Master (P03013) Version, 3. Supplier Master (P04012) Version, 4. Contact Information (P90CA070) Version, 5. Employee Detail Processing (P90CA043) Version, and 6. Opportunities (P90CB020) Version</p> | <p>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.</p> |
|--|---|

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

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

Defaults

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

- | | |
|---|---|
| 1. Search Type | Specify the default search type that appears when you enter an employee into the system. The default value is <i>E</i> . |
| 2. Organizational Structure Type | Specify the default organizational structure that appears when you enter an employee into the system. |
| 3. Employee Phone Number Type | 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 | 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 | 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 | Specify the version of the Address Book MBF (P010004) to use when entering employees. If you leave this processing option blank, the system uses version ZJDE0001. |
| 2. Who's Who MBF (P0100087) Version | Specify the version of the Who's Who MBF (P0100087) to use when entering employees. If you leave this processing option blank, the system uses version ZJDE0001. |

CHAPTER 4

Managing Items and Item Catalogs for CRM

This chapter provides an overview of items and item catalogs, lists prerequisites, and discusses how to:

- Manage items
- Manage item catalogs

Understanding Items and Item Catalogs

If the organization sells, supports, or services items, you must enter those items into the PeopleSoft EnterpriseOne system so that you can track and store details about those items. You enter items into the system using the Item Master program (P4101), which is part of the PeopleSoft EnterpriseOne Inventory Management system. After you enter the item into the system, you can use the CRM Item Detail program (P90CA100) to review CRM-related details about the item, such as:

- The sales opportunities that include the selected item.
- Item availability and pricing information.
- Item features.
- Scripts and solutions that are associated with the item.

You can also use the CRM Item Detail program to associate an item with a partner. You might do this if the organization sells, supports, or services items that are made or supplied by a partner organization.

After you enter items, you can create item hierarchies, which are also called catalogs. You use the Item Hierarchy (Web) program (P4101H), which is part of the PeopleSoft EnterpriseOne Inventory Management system, to set up item hierarchies. After you create item hierarchies, you can:

- Categorize items.
- Attach catalogs to leads, opportunities, customers, and partners.
- Enable customers to use catalogs when placing orders using self-service applications.

Prerequisites

Before you complete the tasks in this chapter, you must enter items into the system.

See Also

PeopleSoft EnterpriseOne Inventory Management 8.11 SPI PeopleBook, “Entering Item Inventory Information”

PeopleSoft EnterpriseOne Sales Order Management 8.11 SPI PeopleBook, “Setting Up Order Processing Information,” Setting Up Self-Service Information for Sales Order Management

PeopleSoft EnterpriseOne Customer Self Service 8.11 SPI PeopleBook, “Placing Orders,” Ordering Through the Product Catalog

Managing Items

This section provides an overview of item management for CRM, and discusses how to:

- Associate an item with a partner.
- Access a sales opportunity from an item.

Understanding Item Management for CRM

After you enter items into the PeopleSoft EnterpriseOne system, you can use the CRM Item Detail program (P90CA100) to view item information, and enter and access additional CRM item information.

You can search for items 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 create a query that restricts the search to that stocking type. You can then use this query each time that you want to perform that search.

After you search for and select an item, you can view these types of 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 are associated with them item.
- Opportunities that are associated with an item.
- Attachments for the item.
- Scripts or solutions that are created for the item.

Much of the information that you see when you access items using the P90CA100 is read-only. To change the values in any of the disabled fields, you must access the item using the Item Master program (P4101).

You can also associate a partner with an item. You might do this if the organization sells, services, or supports an item that is made by one of the partners.

You can also access and change a sales opportunity that is associated with an item. When you access the Sales tab on the Item - Manage <Item Name> form, you can view all of the active opportunities that include the item. You can then select the opportunity and make any necessary changes.

Lastly, you can add attachments to an item. 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.

Forms Used to Manage Items

Form Name	FormID	Navigation	Usage
Search For Items	W90CA100D	<ul style="list-style-type: none"> • CRM Foundation Daily Processing (G90C01), Item Inquiry • Periodic Sales Force Automation Processing (G90CA02), Item Inquiry 	Search for and select items.
Item - Manage <Item Name>	W90CA100B	On the Search For Items form, select an item.	View item information, associate an item with a partner, or access a sales opportunity.

Associating an Item with a Partner

Access the Item - Manage <Item Name> form. Select the Partner tab.

The screenshot displays the 'Item Inquiry - Item - Manage Stapler' application window. At the top, there are navigation tabs: 'Item', 'Partner' (selected), 'Sales', 'Related Objects', and 'Attachments'. Below the tabs, the 'Partner' section contains a 'Close' button. The 'Item Partners' section features a 'Find' button and a data grid. The grid shows 'Records 1 - 1' and includes columns for Partner Number, Alpha Name, ST, and City. A single record is listed: Partner #600002, Partner #600002, CO, Littleton. At the bottom of the grid area, there are 'Assign Partners' and 'Remove' buttons.

Item - Manage <Item Name> form: Partner tab

1. Review the data in the grid to determine which partners are already assigned to the item.
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.

To remove a partner's association with an item, you can do so on the Item Inquiry - Item Manage <Item Name> form. Select the Partner and then click Remove.

Accessing a Sales Opportunity from an Item

Access the Item - Manage <Item Name> form. Select the Sales tab.

1. Select the opportunity that you want to access.
2. On the Opportunity - Manage <Opportunity Name> form, review and update information as necessary.
3. Save any changes, and then click Close to return to the item.

Managing Item Catalogs

This section provides an overview of item catalogs and discusses how to:

- Create a new catalog.
- Perform an advanced item search.
- Perform an advanced catalog search.
- Set processing options for the Item Catalog program (P90CA106).

Understanding Item Catalogs

You create item catalogs, also known as item hierarchies, using the Item Hierarchy (Web) program. You can then access and manage those catalogs using the Item Catalog program (P90CA106). The Item Catalog program enables you to view catalog information and 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, and product family.
- View a catalog item's list of features, availability, and base price.
- View the opportunities and partners that are 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 Item Catalogs

You can view catalogs by selecting Item Catalog from the menu. And, because the Catalog application is integrated into other PeopleSoft 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 cannot select an item until after the lead 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.

Selection 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. 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 the selections and exit from the catalog form, the system returns the choices to the application from which you accessed the Catalog function. For example, when you access Catalog from the Sales Order application, the system adds the items that you selected on the catalog form to the active sales order.

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

Entry Point	Selection Mode	Selection Choices
On the Lead - Manage <Lead Name> form, select the Lead tab, click the Product Interest link and then click the visual assist next to the Description field.	Single select mode	Select catalogs only.
On the Lead - Manage <Lead Name> form, select the Lead tab, click the Product Interest link and then click the Assign Product Interest button.	Multiple select mode	Select catalogs only.
On the Opportunity - Manage <Opportunity Name> form, select the Detail tab and then click the visual assist next to the Product Catalog or Item Number fields.	Single select mode	Select items or catalogs.
On the Sales Order - Edit Sales Order form, select the Sales Order Header tab, and then select Product Catalog from the Go To: drop-down menu.	Multiple select mode	Select items only.

Entry Point	Selection Mode	Selection Choices
On the Sales Order - Edit Sales Order form, select the Sales Order Detail tab, and then select Product Catalog from the More Row Actions: drop-down menu.	Single select mode	Select items only.
On the Quote Order - Edit Sales Order form, select the Sales Order Header tab, and then select Product Catalog from the Go To: drop-down menu.	Multiple select mode	Select items only.
On the Quote Order - Edit Sales Order form, select the Sales Order Detail tab, and then select Product Catalog from the More Row Actions: drop-down menu.	Single select mode	Select items only.

Navigating 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 click the plus or minus sign to expand or collapse the hierarchy. 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 that are available from the catalog that you 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 enables you to quickly find and select catalogs without scrolling through a list of catalogs.

When you select the Advanced Catalog Search link, 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 scroll through catalog pages.

When you select the Advanced Item Search link, 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 grid to restrict the search.

Forms Used to Manage Item Catalogs

Form Name	FormID	Navigation	Usage
Product Hierarchy Maintenance	W4101HD	Sales Order Management Setup (G4241), Item Hierarchy Manager	View catalog hierarchy, delete catalogs, or access forms to create new catalogs.
Product Hierarchy Revisions	W4101HE	Click Add on the Product Hierarchy Maintenance form.	Create a new catalog.
Select From Catalog	W90CA106B	<ul style="list-style-type: none"> CRM Foundation Daily Processing (G90C01), Item Catalog Periodic Sales Force Automation Processing (G90CA02), Item Catalog 	Select and view item catalogs.
Item Search & Select	W40ITM1A	Click the Advanced Items Search link on the Select From Catalog form.	Perform an advanced item search.
Catalog Search & Select	W90CA106C	Click the Advanced Catalogs Search link on the Search From Catalog form.	Perform an advanced catalog search.

Creating a New Catalog

Access the Product Hierarchy Revisions form.

Product Hierarchy Revisions form

Structure Type

Enter the type of organizational structure that applies to the catalog. For example, if the catalog is used by Customer Self Service applications, enter CSS in this field.

Description

Enter a brief description for the catalog. You can use this description to search for the catalog.

Sequence Number	Enter the catalog's sequence number, which determines the order in which the system displays valid catalogs.
Category Code	Enter a category code for the catalog. This field, along with the associated values, are user-defined.
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. For example, <i>Bicycles</i> might be the parent catalog for the <i>Mountain Bikes</i> and <i>Road Bikes</i> catalogs.

See *PeopleSoft EnterpriseOne Sales Order Management 8.11 SP1 PeopleBook*, "Setting Up Order Processing Information," Setting Up Self-Service Information for Sales Order Management.

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

	Search Text	Item Number	Description
<input type="radio"/>	Calculators	SRM1302	Calculators
<input type="radio"/>	Paper Pads	SRM1303	Paper Pads
<input type="radio"/>	Pens	SRM1304	Pens
<input type="radio"/>	Calendars	SRM1305	Calendars
<input type="radio"/>	CR	CRIS	Item for individual entity
<input type="radio"/>	SRM Stock Memory Card	SRM4300	SRM Stock Memory Card
<input type="radio"/>	SRM Stock Disk Drive	SRM4301	SRM Stock Disk Drive
<input type="radio"/>	SRM Stock Mouse	SRM4302	SRM Stock Mouse
<input type="radio"/>	SRM Stock Monitor	SRM4303	SRM Stock Monitor
<input type="radio"/>	SRM Stock CPU	SRM4304	SRM Stock CPU
<input type="radio"/>	SRM Nonstock Bubble	SRM4305	SRM Nonstock Bubble
<input type="radio"/>	SRM Trans UOM	SRM4306	SRM Trans UOM
<input type="radio"/>	SRM Stock UOM 12	SRM4307	SRM Stock UOM 12
<input type="radio"/>	Multiples Non-Stock Item #3	4603	Multiples Non-Stock Item #3
<input type="radio"/>	SRM	5555	Parent Item - Outside Oper
<input type="radio"/>	Multiples Non-Stock Item #5	4604	Multiples Non-Stock Item #5

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 that is associated with the item.

Performing an Advanced Catalog Search

Access the Catalog Search & Select form.



Catalog Search & Select form

Catalog Path

Displays the navigation to the catalog’s location. The path begins with the organizational structure type and is followed by any parent catalogs that are associated with the selected catalog.

Setting Processing Options for the Item Catalog Program (P90CA106)

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

Default

Organization Structure Type

Specify a default value for the Organizational Structure field on the Item Catalog Search and Select form.

CHAPTER 5

Managing Customer Information

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

- Enter basic customer information.
- Enter additional customer information.
- (Rapid Start CAN and USA) Review credit and convert prospect to customer.
- Review sales information for customers.
- (Rapid Start CAN and USA) Review the opportunity pipeline.
- Review service information for customers.

Understanding Customer Information

The CRM Customer Detail program (P90CA080) enables you to enter, view and modify CRM information for each customer. You can also access additional PeopleSoft EnterpriseOne programs directly from the CRM Customer Detail program, which enables you to easily view and update additional information about a customer. For example, if you select the Sales tab from the customer record, you can add a new sales order for the customer or update an existing order using programs from the PeopleSoft EnterpriseOne Sales Order Management system.

You can also create parent/child relationships between customers. For example, one large company might have several subsidiaries. You can enter the large company as the parent customer and the subsidiaries as children of the large company. If a selected customer record has subordinate records, you can click the Parent Child Hierarchy link to view the parent and child records.

The CRM Customer Detail program includes these tabs:

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 that are associated with the customer.
Activities	View or modify activities that are related to the customer, or add a new activity.
Sales	View or modify sales order information for the customer, or add a new order.

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.

Entering Basic Customer Information

This section provides overviews of basic customer information and personal information management (PIM) subscriptions for customers, and discusses how to:

- Enter basic customer information.
- Set processing options for the CRM Customer Detail program (P90CA080).

Understanding Basic Customer Information

You use the Customer - Add Customer form to enter basic customer information. This form contains tabs that enable you to enter and modify customer information as described in this table:

Link Name	Link Purpose
Address and Phone	Enter the primary addresses, telephone and electronic addresses.
Financial	Enter credit, tax, payment terms, language, and price group information for the customer.
Classification	Enter user-defined information about customers. This tab includes 30 user-defined category code fields that you can customize to store information that is specific to the business needs.

After you enter basic customer information, you can use the CRM Customer Detail program to maintain and modify CRM customer information.

Forms Used to Enter Basic Customer Information

Form Name	FormID	Navigation	Usage
Customer - Search for Customers	W90CA080D	<ul style="list-style-type: none"> • CRM Foundation Daily Processing (G90C01), Customer. • Daily Sales Force Automation Processing (G90CA01), Customer. • Daily Support Processing (G90CE01), Customer. 	Select customer records, access forms to add a new customer, or access a list of customers to which you can subscribe.
Customer - Add Customer	W90CA082C	Click Add on Customer - Search For Customers.	Enter basic customer information and subscribe to a customer during customer entry.
Customer - Manage <Customer Name>	W90CA080A	On Customer - Search For Customers, select a customer record.	View or modify customer information. Subscribe to an existing customer.

Entering Basic Customer Information

Access the Customer - Add Customer form.

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

Select this option to specify that the customer is active for CRM purposes.

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 that the United States uses to classify goods and services. This code is four digits for SIC or six digits 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.

Standard Industrial Trade Classification (SITC). A numerical code system that was developed by the United Nations to classify goods that are used

in international trade. International organizations use this code. An SITC code can be up to six digits.

PIM Subscription (personal information management subscription)

Select this option to add the customer record to the personal information management (PIM) system address book. PIM systems include Microsoft Exchange and Lotus Notes. This option appears only if the logged-in user is set up as a PIM user. When you select this option, the system automatically adds the customer to the PIM system contacts.

Address and Phones

Select the Address and Phones tab.

The system uses the information that you enter on this tab when you create a customer PIM subscription record.

Prefix Enter the three-digit prefix, or area code, of the associated phone number.

Phone Number Enter the six-digit phone number, not including the area code or prefix.

Financial

Select 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 F0150 table for the blank structure type. This address number must exist in the F0101 table 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 who is 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 customer.

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 that you enter against the F4008 table. The system uses the tax rate area in conjunction with the tax explanation code and tax rules to calculate tax and GL distribution amounts when you create an invoice or voucher.

Tax Expl Code (tax explanation code)

Enter the hard-coded user-defined code (system 00, type EX) that controls the algorithm that the system uses to calculate tax and general ledger 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. You can define each transaction pay item 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

Select 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

Setting Processing Options for the CRM Customer Detail Program (P90CA080)

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

Entry

Tax ID

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

Process

- 1. Postal Code Editing** Specify whether to activate postal code editing. Postal code editing first verifies that the postal code exists in the F0117 table and then uses information from the table to enter blank City, County, Country, and State fields.
- 2. Postal Code Address Retrieval** Specify whether to activate Postal Code address retrieval. If the postal code is valid and address lines one through four are blank, the system can retrieve address information from the F0118 table. If you set the processing option to activate with the Postal Code Selection Window for multiple addresses, the system displays all available addresses for the postal code.
- 3. Phone Number Type** 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** Specify the organization structure the system uses for the Customer application's Parent Child Hierarchy view
- 5. Sales Team Member Search Type** 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)** Specify whether a user has the authority to add customers while running on a mobile client.
- 2. Primary Address Action Security (Add and Change)** 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)	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)	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)	Specify 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	Specify to allow or prevent data entry on the mobile client if you use Address Book's duplicate data entry feature. If you set this processing option to <i>I</i> , the system disables the customer Name, City, and State fields on the mobile client when maintaining an existing customer.
7. Mobile Duplicate Tax ID Validation	Specify whether to enable or prevent data entry on the mobile client if you use Address Book's duplicate tax ID entry feature. If you set this processing option to <i>I</i> , the system disables the customer Tax ID and Country fields on the mobile client when maintaining an existing customer.

Entering Additional Customer Information

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

- Enter additional address and phone information.
- Enter customer financial information.
- Enter customer options.
- Enter service information for a customer.
- Use related links.
- Enter customer contacts.
- Attach partners to a customer.
- Add activities to a customer.
- Create customer profiles.
- Work with customer interactions.
- Subscribe to multiple customers.

Understanding Additional Customer Information

After you enter basic customer information into the system, the system creates a customer record. Using this record, you can enter additional information about each customer, including:

- Addresses and phones

You can enter multiple addresses, phone and fax numbers, and email addresses for each customer record that you create.

- Financial information

You can enter financial information about each customer, including credit, tax, general ledger, collections, and invoicing information. This information enables you to easily manage all of the financial transactions that occur between the organization and the customers.

- Customer options

You can enter ordering, shipping, and pricing options that are specific to each customer. These options enable you to manage transactions when a customer purchases goods or services from the organization.

- Contacts

You can enter multiple contacts for each customer. You can specify information about each contact, so that you know who to contact for each type of transaction that occurs between the organization and the customer.

- Associated partners

You can associate partners with customers. For example, if one of the organization's partners is currently responsible for completing a sale to the customer, you can associate that partner with the customer.

- Activities

You can attach existing activities or enter new activities to the customer record. Activities are the tasks that the people who are working with the customer should complete. For example, a sales representative might set up a recurring activity to contact an existing customer on a monthly basis to determine whether the customer needs additional goods or services.

- Customer profiles

Because each organization's business needs differ, it is impossible to anticipate every piece of data that you must track for customers. To enable you to effectively manage customers, the CRM Foundation system provides you with configurable, user-defined customer profiling. You can access up to 30 user-defined fields using the Profiles link on the Customer - Manage <Customer Name> form. You can configure these fields to track information that is specific to the business and is not otherwise captured in the PeopleSoft EnterpriseOne system.

- Interactions

You can set up Apropos, a third-party system that enables you to manage the interactions between the organization and the customers.

- Subscriptions

You can automatically add information about the customer to the PIM system, such as Microsoft Exchange and Outlook, or Lotus Notes.

Subscribing to Customers

You can subscribe to customers to add their contact information to the PIM system.

PeopleSoft EnterpriseOne provides the ability to synchronize user data between third-party PIM systems and PeopleSoft EnterpriseOne CRM users. With this synchronization, CRM users can share and manage personal information such as customer and contact information, which is stored in IBM Domino or Microsoft Exchange PIM systems.

Using the PIM Subscription option, users can automatically add a customer record to their personal contacts in Lotus Notes or Microsoft Exchange or Outlook. When you subscribe to a customer, corresponding objects are created in the PIM system database. If users update or delete items in either the CRM or PIM system, the changes are synchronized in both locations. For example, if you change the phone number or address for a customer in the PIM system, the system reflects that change in the PeopleSoft EnterpriseOne customer record. The system makes inbound customer changes to the F0116 table.

Note. Customers must exist in the PeopleSoft EnterpriseOne system before bidirectional synchronization occurs. You cannot add a customer in the PIM system and synchronize the customer record into the PeopleSoft EnterpriseOne system. Bidirectional synchronization is supported only after the customer exists in the PeopleSoft EnterpriseOne system.

Additionally, the customer address information from the PIM system is updated to the F01161 table (which is the alternate address table), and is not updated in the F0116 (which is the primary address table). Most PeopleSoft EnterpriseOne processes use the address in the F0116 table. Therefore, be aware that any changes that you make to a customer's address in the PIM system must also be made in the F0116 table.

Before a user can subscribe to a customer, they must be set up as a PIM user. Once set up, a PIM user can subscribe to customers using these methods:

- Subscribe to a single customer.

The user can select the PIM Subscription option on the Customer - Manage <Customer Name> form. You must use this method to subscribe to a customer with which you are not associated.

- Subscribe to multiple customers at one time.

The user can select the PIM Subscription link on the Search for Customers form to select from a list of customers with which he or she is associated. For example, when a sales representative selects the PIM Subscription link, the system displays all of the customer records in which they are included as an active member of the sales team. The sales representative can then subscribe to any or all of the customers in the list.

Each PIM user can subscribe to each customer record. The PIM Subscription option is selected or deselected based on the logged-in user who is viewing the customer record. For example, if User A subscribes to Customer 123, the PIM Subscription option is selected each time User A views Customer 123's record. However, if User B has not yet subscribed to Customer 123, the PIM Subscription option is not selected when User B views Customer 123's record. User B can select the option to subscribe to Customer 123.

PeopleSoft EnterpriseOne relies on a third-party software product, Intellisync Server, to enable data synchronization between PeopleSoft EnterpriseOne CRM and PIM systems. You must set up the Intellisync Server, the PIM system, and PeopleSoft EnterpriseOne users before you can use PIM synchronization functionality. Typically, a system administrator completes these tasks.

See *PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: System Administration*

Forms Used to Enter Additional Customer Information

Form Name	FormID	Navigation	Usage
Search for Customers	W90CA080D	CRM Foundation Daily Processing (G90C01), Customer	Select a customer record.
Customer-Manage <Customer Name>	W90CA080A	Select a customer on the Search for Customers form.	Enter and update customer information, or subscribe to a single customer.
Add Activity	W01301B	On the Customer-Manage <Customer Name> form, select the Activities tab and click Add.	Add a new activity for the customer.
PIM Subscription	W90CA070E	Click the PIM Subscription link on Customer - Search for Customer.	Subscribe to multiple customers.

Entering Additional Address and Phone Information

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

- View or modify the customer's primary address information in the upper part of the form.
- In the Alternate Addresses grid, perform any of these actions:
 - View alternate addresses for the customer.
 - To delete an alternate address, select the address in the grid and then click Delete.
 - To change the customer's primary address to one of the alternate addresses displayed, select the address in the grid and then click 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.
- In the Phones and Fax grid, perform any of these actions:
 - View phone and fax information for the customer.
 - To delete a phone or fax number, select the entry in the grid and then click Delete.
 - Add a new phone or fax number by selecting a blank row in the grid and entering phone or fax information.
- In the Electronic Addresses grid, perform any of these actions:
 - View electronic addresses for the customer.
 - To delete an electronic address, select the address in the grid and then click Delete.
 - Add a new electronic address by selecting a blank row in the grid and entering address information.
 - To send a previously created email message, click Send Email.
This field becomes active when the selected row contains an electronic address for which an email message was created.
- When you are finished viewing or modifying address and phone information, save or undo any changes.

Entering Customer Financial Information

Access the Customer - Manage <Customer Name> form. Select the Customer tab and then click the Financial link.

Customer - Customer - Manage Capital Company

Customer | Contact and Partner | Activities | Sales | Service | Attachments

[Detail](#) | [Address and Phone](#) | **Financial** | [Customer Options](#) | [Service Information](#) | [Profile](#) | [Related Links](#)

Save Changes | Undo Changes | Close

Payment Terms: 5/10 Net30
 Currency Code: U.S. Dollar

Credit | Tax | G/L Distribution | Collection | Invoice

Credit Limit	<input type="text" value="15,000.00"/>	Recall for Review Date	<input type="text"/>
Credit Manager	<input type="text" value="ABBOTT"/> <i>Dominique Abbott</i>	Date of Last Credit Review	<input type="text" value="02/08/04"/>
Credit Message	<input type="text"/>	Date Account Opened	<input type="text" value="22/04/97"/>
Temporary Credit Message	<input type="text" value="7"/>	Credit Check Level	<input type="text" value="C"/> <i>Customer (Sold To)</i>
Person Opening Account	<input type="text" value="MM5564083"/>	ABC Code Sales	<input type="text" value="A"/> <i>Grade A</i>
Last Reviewed By	<input type="text" value="SK7157852"/>	ABC Code Margin	<input type="text" value="C"/> <i>Grade C</i>
Financial Strmts on Hand	<input type="text"/>	ABC Code Avg Days	<input type="text" value="C"/> <i>Grade C</i>
Dun Bradstreet Date	<input type="text"/>		<input type="text"/>
Experian Date	<input type="text"/>		<input type="text"/>

Customer - Manage <Customer Name> form: Customer tab: 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

I: 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

Select 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 who is 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	<p>Enter the code that controls the way the system conducts credit checking. Codes are:</p> <p><i>P</i>: Credit check based on the customer's parent number.</p> <p><i>C</i>: Credit check against the customer number only.</p> <p><i>S</i>: Credit check against the customer sold to.</p> <p><i>L</i>: Credit check based on the line of business.</p> <p>If you use method <i>P</i>, 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, the system posts all accounts receivable to the customer number (SDAN8) during Sales Update (P42800).</p>
Person Opening Account	Displays the system-provided user ID of the person who created the customer record.
Last Reviewed By	Displays 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

Displays the date that financial statements were received to evaluate a company's credit worthiness.

Dun Bradstreet Date

Displays the date on which Dun & Bradstreet ratings were available.

Experian Date

Displays the date on which the Experian ratings were available.

Tax

Select the Tax tab.

Tax Expl Code (tax explanation code)

Enter the hard-coded user-defined code (system 00, type EX) that controls the algorithm the system uses to calculate tax and GL 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. You can define each transaction pay item 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 F4008 table. The system uses the tax rate area in conjunction with the tax explanation code and tax rules to calculate tax and GL 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

Select the G/L Distribution tab.

G/L Offset

Enter the code that determines the accounts receivable 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 GL account number. If you leave this field blank, the system uses the account that is set up for RC to locate the account number. You can also use the value in this field 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; because 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 AR 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 GL 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

Select 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 specify whether the customer's overdue invoices are eligible to appear on the collection report that you send to an external agency. When you select this option, 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, the system prints delinquency notices.
Invoice	Select 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: <i>C</i> : Check <i>D</i> : Draft <i>T</i> : 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 (the F03B11 table) 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: <i>C</i> : Customer (AN8) <i>N</i> : 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. <i>P</i> : Parent (PA8) <i>R</i> : Payor (PYR) <i>1</i> : First address number (AN81) <i>2</i> : Second address number (AN82) <i>3</i> : Third address number (AN83) <i>4</i> : Fourth address number (AN84) <i>5</i> : Factor Special/Payee (AN85) <i>6</i> : 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 that is assigned to a list of algorithms that define the order in which the programs should be run.

A/B Amount Codes	Enter the code that specifies 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 system uses the currency that you specify 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	Enter the number of invoice copies that 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, you can process receipts automatically for the customer or company. You must activate this option 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 you select this option, the system holds the invoices 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 you generate invoices from the Sales Order Management system.
Invoice Consolidation	Enter the code that indicates whether a customer wants to receive consolidated invoices. Codes are: <i>Y</i> : Consolidate invoices. If you specify consolidation, the system generates a single invoice from multiple sales orders. <i>N</i> : Do not consolidate invoices.

Entering Customer Options

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

Customer - Customer - Manage Capital Company

Customer
Contact and Partner
Activities
Sales
Service
Attachments

[Detail](#) | [Address and Phone](#) | [Financial](#) | **Customer Options** | [Service Information](#) | [Profile](#) | [Related Links](#)

Save Changes
Undo Changes
Close

Address Type Bill To and Ship To Address

Ordering Options
Pricing Options
Shipping Options

Minimum Order Value	<input type="text"/>	
Maximum Order Value	<input type="text"/>	
Order Template	<input type="text" value="BIKES"/>	<i>Bicycles</i>
Item Restrictions	<input type="text"/>	
Hold Orders Code	<input type="text"/>	<i>Blank - Hold Codes 42/HC</i>
Priority Processing Code	<input type="text" value="0"/>	<i>Default</i>
Weight Display U/M	<input type="text"/>	.
Volume Display U/M	<input type="text"/>	.
OP Business Objective	<input type="text"/>	<i>Standard</i>
Print Message	<input type="text"/>	.

<input type="checkbox"/> Customer PO Required	<input type="checkbox"/> Exempt from Credit Hold
<input checked="" type="checkbox"/> Backorders Allowed	<input checked="" type="checkbox"/> Substitutes Allowed
<input type="checkbox"/> COA Print	<input type="checkbox"/> Bypass Audit Logging

Customer - Manage <Customer Name> form: Customer tab: Customer Options link

Address Type

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

X: Bill to and a ship to address

S: Ship to address only

B: Bill to address only

Ordering Options

Select the Ordering Options tab.

Minimum Order Value	Enter a value for the order, below which the order is placed on hold. If you attempt to enter an order whose total is less than the minimum order value, the system displays an error message.
Maximum Order Value	Enter a value for the order, above which the order is placed on hold. If you attempt to enter an order whose total is more than the maximum order value, the system displays an error message.
Order Template	Displays a list of items that you order frequently. The system typically groups the items 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>I</i> : A customer can be sold only those items set up on the Item Restrictions screen. <i>E</i> : 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 indicates how to handle this customer's orders on a priority basis. Use this value to set up print pick slips so you can print them on a priority basis. The system assign this code from the customer billing instructions. In addition, you can use this code to specify sequence for the backorder print report and automatic batch release programs to release those orders with the highest priority first.
Weight Display U/M (weight display unit of measure)	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 (volume display unit of measure)	Displays the user-defined code (system 00, type UM) that identifies the unit of measure that 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 (order promising business objective)	Displays 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	Displays the user-defined code that you assign to each print message. Examples of text messages include engineering specifications, hours of operation during holiday periods, and special delivery instructions.
Customer PO Required	Specify whether the customer must enter a value in the Customer Purchase Order Number field The system edits this field during Sales Order Entry.
Exempt From Credit Hold	Enter the code that indicates whether the customer is exempt from credit checking in the Sales Order Processing cycle. Codes are: <i>Y</i> : 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 for customer using the Customer Billing Instructions program (P03013). When you select this option, the system enables backorders. When you do not select this option, the system does not enable backorders for this item regardless of the backorders code that is assigned to the customer.

Substitutes Allowed

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

COA Print (Certificate of Analysis 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

Select 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 you select this option, price information appears.

Shipping Options

Select 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 the 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 that freight summary facilities use 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 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.

Carrier Number Enter the address number for the item's preferred carrier. The customer or the 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 that freight summary facilities use 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 that freight summary facilities use 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 you select this option, 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. This feature is activated only when you create orders in the Sales Order Entry system with availability checking set to On, since sales order entry is the only time that you can group all lines together as an order. If you perform availability checking during the pick slips or shipment confirmation process, you cannot guarantee that all lines are grouped together for the order.

Delivery Note Select this option to specify whether the system prints delivery notes for this customer on the invoice. When you select this option, the system prints delivery notes on the invoice.

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

Entering Service Information for a Customer

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

To add a flash message, which appears each time a user accesses the customer record, click the Flash Message link and enter the message.

Customer - Customer - Manage Capital Company

Customer | Contact and Partner | Activities | Sales | Service | Attachments

[Detail](#) | [Address and Phone](#) | [Financial](#) | [Customer Options](#) | **Service Information** | [Profile](#) | [Related Links](#)

Save Changes | Undo Changes | Close

[Flash Message](#)

Customer Number: 4242 *Capital Company*

Adjustment Schedules

Contracts	SCHCON	<i>Schedule for Contracts</i>
Work Orders	SCHSVO	<i>Schedule for S&WM Serv. Ord.</i>
Maintenance Request	CSESCH	<i>Case Test</i>

Default Service Provider:

Default Dealer:

Geographic Region:

Work Order Service Type:

Time Zone: 23 *Eastern Time (US & Canada)*

Daylight Savings Rule: USA

Standard Center:

Shipment Tracking:

Work Center: S30 *LM Service Center*

Responsible Business Unit:

Customer - Manage <Customer Name> form: Customer tab: 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	Select 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.

Using Related Links

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 that are 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 - Customer - Manage Capital Company

Customer | Contact and Partner | Activities | Sales | Service | Attachments

[Detail](#) | [Address and Phone](#) | [Financial](#) | [Customer Options](#) | [Service Information](#) | [Profile](#) | **Related Links**

Additional Information	Review amounts invoiced, credit information, orders for prior year, and year to date.
Item Restrictions	Add, copy, or delete item restrictions.
EDI Transaction XRef	Define the EDI transactions the customer will implement with your 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 general account information, account statistics, credit limit and payment terms, open amounts, aging information, credit messages.
Account Status History	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

Entering Customer Contacts

Access the Customer - Manage <Customer Name> form. Select the Contact and Partner tab and then click the Contact link.

Customer - Customer - Manage Eastern Area Distribution Center

Customer | **Contact and Partner** | Activities | Sales | Service | Attachments

Contact | Partner

Save Changes | Undo Changes | Close

Phone Number Type: FAX

Find | Select

Records 1 - 3 [Customize Grid](#)

	Alpha Name	Contact Type	Contact Type	Title	Phone Prefix	Phone Number
<input type="radio"/>	Joe Fisher	D	Decision Maker	CEO	303	555-1122
<input checked="" type="radio"/>	<input type="text" value="Bob Davis"/>	<input type="text" value="D"/>	Decision Maker	<input type="text" value="CIO"/>	<input type="text" value="303"/>	<input type="text" value="555-1123"/>
<input type="radio"/>						

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

1. Find and select 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 7, “Managing Contacts,” page 87](#).

3. To delete a contact record, select 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 entering or modifying contact information, click Save Changes.

Attaching Partners to a Customer

Access the Customer - Manage <Customer Name> form’s Contact and Partner tab and then click the Partner link.

Customer - Customer - Manage Eastern Area Distribution Center

Customer | **Contact and Partner** | Activities | Sales | Service | Attachments

[Contact](#) | **Partner**

Close

Find

Records 1 - 2 Customize Grid 

<input type="checkbox"/>		Partner Number	Alpha Name	ST	City
<input type="checkbox"/>		754831	Burrill Construction	NC	Charlotte
<input type="checkbox"/>		755075	Hamilton Homestead	NC	Raleigh

Assign Partners Remove

Customer - Manage <Customer Name> form: Contact and Partner tab: 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.

Adding Activities to a Customer

Access the Add Activity form.

Add Activity form

Time Date Start and End Date Range

Enter the beginning date for the date range, or 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 time and date when the activity was completed.

Subject

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

Creating Customer Profiles

Access the Customer - Manage <Customer Name> form. Select the Detail tab and click the Profile link.

Customer - Customer - Manage Eastern Area Distribution Center

Customer | Contact and Partner | Activities | Sales | Service | Attachments

[Detail](#) | [Address and Phone](#) | [Financial](#) | [Customer Options](#) | [Service Information](#) | **Profile** | [Related Links](#)

Save Changes | Undo Changes | Close

# of Employees	<input type="text" value="-- Select One --"/>	Profiling - UDC 9	<input type="text" value="-- Select One --"/>
Profiling - UDC 2	<input type="text" value="-- Select One --"/>	Profiling - UDC 10	<input type="text" value="-- Select One --"/>
Profiling - UDC 3	<input type="text" value="-- Select One --"/>	Profiling - UDC 11	<input type="text" value="-- Select One --"/>
Profiling - UDC 4	<input type="text" value="-- Select One --"/>	Profiling - UDC 12	<input type="text" value="-- Select One --"/>
Profiling - UDC 5	<input type="text" value="-- Select One --"/>	Profiling - UDC 13	<input type="text" value="-- Select One --"/>
Profiling - UDC 6	<input type="text" value="-- Select One --"/>	Profiling - UDC 14	<input type="text" value="-- Select One --"/>
Profiling - UDC 7	<input type="text" value="-- Select One --"/>	Profiling - UDC 15	<input type="text" value="-- Select One --"/>
Profiling - UDC 8	<input type="text" value="-- Select One --"/>		
Profiling - Text 1	<input type="text"/>		
Profiling - Text 2	<input type="text"/>		
Profiling - Text 3	<input type="text"/>		
Profiling - Text 4	<input type="text"/>		
Profiling - Text 5	<input type="text"/>		

Customer - Manage <Customer Name> form: Detail tab: Profile link

Note. You can configure each field on this form to store the data that the organization must track for each customer. Before you enter data on this form, you should define the needs of the organization, and configure the fields accordingly. Typically, the system administrator is responsible for configuring user-defined fields.

See *PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: System Administration*

Working With 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.

Subscribing to Multiple Customers

Access the PIM Subscription form.

1. Select one of these options to determine which customers that the system displays:
 - Show All
 - Show Subscribed Only
 - Show Unsubscribed Only
2. Select the customers to which you want to subscribe, or deselect the customers to which you want to unsubscribe.
3. Click OK to save the subscription changes, and then click Cancel to return to the Search for Customers form.

(Rapid Start CAN and USA) Reviewing Credit and Converting Prospects to Customers

This section discusses:

- How to review credit and convert prospects into customers.
- Preconfigured processing options for Canada and the United States CRM Customer Detail (P90CA080).

Reviewing Credit and Converting Prospects into Customers

This table lists the tasks for reviewing credit:

Task	Navigation	Program and Version
Review credit information.	Customer Relationship Management Customer Select the Customer tab. Select the Financial link.	P90CA080/RIS0001
Convert prospect into customer by changing the search type to C.	Customer Relationship Management Customer Select the Detail link.	P90CA080/RIS0001

Data reports provide additional information about data that has been preconfigured for Rapid Start.

See *PeopleSoft EnterpriseOne Rapid Start Fundamentals 8.11 SP1 PeopleBook*, “(CAN and USA) Rapid Start Data Reports”.

Preconfigured Processing Options for Canada and the United States CRM Customer Detail (P90CA080)

These processing options show the values that are preconfigured for version RIS0001.

Entry

Processing Option Description	Value or Status
1. Tax ID	blank

Versions

Processing Option Description	Value or Status
1. Address Book (P01012) Version	blank
2. CRM Customer Processing (P90CA087) Version	blank
3. Opportunity (P90CB020) Version	RIS0001
4. Quote Order Entry (P42101) Version	blank
5. Sales Order Entry (P42101) Version	blank
6. Contact (P90CA070) Version	blank
7. Service Contract (P1721) Version	blank

Process

Processing Option Description	Value or Status
1. Postal Code Editing	1
2. Postal Code Address Retrieval	blank
3. Phone Number Type	blank
4. Organization Structure Type	blank
5. Sales Team Member Search Type	blank

Mobile Client

Processing Option Description	Value or Status
1. Customer Action Security	blank
Add	blank
Change	blank
2. Primary Address Action Security	blank
Add and Change	blank
3. Alternate Address Action Security	blank

Processing Option Description	Value or Status
Add	blank
Change	blank
Delete	blank
4. Phone and Fax Action Security	blank
Add	blank
Change	blank
Delete	blank
5. Electronic Address Action Security	blank
Add	blank
Change	blank
Delete	blank
6. Mobile Duplicate Data Entry	blank
7. Mobile Duplicate Tax ID Validation	1

See Also

Chapter 5, “Managing Customer Information,” Setting Processing Options for the CRM Customer Detail Program (P90CA080), page 43

Reviewing Sales Information for Customers

This section provides an overview of sales information and discusses how to:

- Review sales team information.
- Review customer opportunities.
- View the pipeline.
- Review quotes or sales orders.

Understanding Sales Information

For a sales organization, easy access to a customer’s sales-related information is critical. Sales information includes:

- Sales team.

You can review all of the members, both past and present, of a customer’s sales team. You can also review detailed information about each member of the sales team, such as their role and commission setup.

- Sales opportunities.

You can review all of the active sales opportunities that are associated with a customer, including the potential sales amount of each opportunity.

- Pipeline.

You can review, at a glance, the total amount of potential revenue that is currently in process for a customer.

- Sales orders and quotes.

You can review all of the quotes and sales orders that are associated with a customer. You can also view detailed information about each record, such as the status, ship date, and backorder information.

See Also

PeopleSoft EnterpriseOne Customer Relationship Management 8.11 SP1 Sales Applications PeopleBook, “Managing the Sales Force,” Adding Sales Team Members to Territories and Industry Groupings

PeopleSoft EnterpriseOne Customer Relationship Management 8.11 SP1 Sales Applications PeopleBook, “Managing Sales Opportunities”

Forms Used to Review Sales Information

Form Name	FormID	Navigation	Usage
Search for Customer	W90CA080D	CRM Foundation Daily Processing (G90C01), Customer	Select a customer.
Customer - Manage <Customer Name>	W90CA08AA	Select a customer on the Search for Customer form.	View a customer record.
Sales Team Search and Select	W90CA041A	From the Customer - Manage <Customer Name> form, select the Sales tab, then click the Sales Team link. Click the Assign Sales Team button.	Select a sales team or sales team member.
Edit Sales Team	W90CA08AB	From the Customer - Manage <Customer Name> form, select the Sales tab, then click the Sales Team link. Click the sales team member or sales group name, or select a sales group and click Sales Group Details.	View or modify sales team information.
Edit Sales Order	W42101D	From the Customer - Manage <Customer Name> form, select the Sales tab, and then click Quote or Sales Order. Select the order that you want to review.	View or modify an existing sales order.

Reviewing Sales Team Information

Access the Customer - Manage <Customer Name> form.

1. Select the Sales tab, and then click the Sales Team link.
2. Find and select the sales team whose information you want to review, and then click Sales Group Details.
3. On Edit Sales Team, review or modify sales team information.
4. To assign a sales team member to the customer, click Assign Sales Team and then select a sales team member on the Sales Team Search and Select form.

Note. You must select the Sales Team Override option on the Customer - Manage <Customer Name> form to avoid the deletion of manual additions to the sales team during the next automated alignment.

See *PeopleSoft EnterpriseOne Customer Relationship Management 8.11 SPI Sales Applications PeopleBook*, “Managing the Sales Force”.

5. To view, modify, or delete commissions, click Commissions to access the Customer Master Commission Lookup form.

Reviewing Customer Opportunities

Access the Customer - Manage <Customer Name> form.

1. Select the Sales tab and then click the Opportunity link.
2. Find and select the opportunity that you want to review.
3. On Opportunity - Manage <Opportunity Name>, view or modify the opportunity information.
4. To convert the opportunity to a quote or sales order, click Convert to Quote or Convert to Sales Order, respectively.

Be sure that you are familiar with the opportunity conversion process before you click these buttons.

See *PeopleSoft EnterpriseOne Customer Relationship Management 8.11 SPI Sales Applications PeopleBook*, “Managing Sales Opportunities”.

5. When you are finished viewing or modifying the opportunity, save any changes and then click Close.

Viewing the Pipeline

Access the Customer - Manage <Customer Name> form. Select the Sales tab and then click the Pipeline link to view pipeline information.

Customer - Customer - Manage Capital Company

Customer | Contact and Partner | Activities | **Sales** | Service | Attachments

[Sales Team](#) | [Opportunity](#) | **[Pipeline](#)** | [Quote](#) | [Sales Order](#)

Close

Records 1 - 1

Pipeline Total	Currency Code	90-99 %	80-89 %	70-79 %	60-69 %	50-59 %	40-49 %	30-39 %	20-29 %	10-19 %	1-9 %
123,125.00	USD			61,875.00					56,250.00	5,000.00	

Opportunity

No records fetched.

Opportunity Number	Sold To Customer	Sold To Customer Desc.	Opportunity Description	Sales Cycle	%	Potential Amount	Currency Code	Close Date
--------------------	------------------	------------------------	-------------------------	-------------	---	------------------	---------------	------------

Customer - Manage <Customer Name> form: Sales tab: Pipeline link

Reviewing Quotes and Sales Orders

Access the Customer - Manage <Customer Name> form. Select the Sales tab, and then click either the Quote or Sales Order link.

1. In the grid, find and select the quote or sales order that you want to review.
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.

See *PeopleSoft EnterpriseOne Sales Order Management 8.11 SPI PeopleBook*, “Entering Sales Orders”.

(Rapid Start CAN and USA) Reviewing the Opportunity Pipeline

This section lists a prerequisite and discusses:

- How to review the opportunity pipeline.
- Preconfigured processing options for Canada and the United States CRM Employee (P90CA040).

Prerequisite

Enter multiple opportunities for the sales representative.

See *PeopleSoft EnterpriseOne Customer Relationship Management 8.11 SPI Sales Applications PeopleBook*, “Managing Sales Opportunities,” Entering Opportunities.

Reviewing the Opportunity Pipeline

This table lists the tasks for reviewing the opportunity pipeline.

Task	Navigation	Program and Version
Review pipeline.	Customer Relationship Management Employee Select the Sales tab. Select the Pipeline link.	P90CA040/RIS0001

Data reports provide additional information about data that has been preconfigured for Rapid Start.

See *PeopleSoft EnterpriseOne Rapid Start Fundamentals 8.11 SP1 PeopleBook*, “(CAN and USA) Rapid Start Data Reports”.

Preconfigured Processing Options for Canada and the United States CRM Employee (P90CA040)

These processing options show the values that are preconfigured for version RIS0001.

Display

Processing Option Description	Value or Status
1. Tax ID (For Future Use)	blank

Versions

Processing Option Description	Value or Status
1. Address Book (P01012) Version	blank
2. Customer Master (P03013) Version	blank
3. Supplier Master (P04012) Version	blank
4. Contact Information (P90CA070) Version	blank
5. Employee Detail Processing (P90CA043) Version	blank
6. Opportunities (P90CB020) Version	RIS0001

See Also

[Chapter 3, “Setting Up CRM Constants and Employees,” Setting Processing Options for the Employee Detail Program \(P90CA040\), page 26](#)

Reviewing Service Information For Customers

This section discusses how to:

- Review equipment master information.
- Review service contract information.
- Review case information.
- Review service work order information.

Forms Used to View or Modify Service Information

Form Name	FormID	Navigation	Usage
Search for Customer	W90CA080D	CRM Foundation Daily Processing (G90C01), Customer.	Select a customer.
Customer - Manager <Customer Name>	W90CA08EA	On the Search for Customer form, select a customer.	Review customer information.

Reviewing Equipment Master Information

Access the Customer - Manage <Customer Name> form.

Customer - Customer - Manage Capital Company

Customer | Contact and Partner | Activities | Sales | **Service** | Attachments

Equipment Master | [Service Contract](#) | [Case](#) | [Service Work Order](#)

Add Close

Find

Records 1 - 10

Asset Number	Description	Customer Number	Site Number	Serial Number
43094	TV Set	4242	4242	12345A
43107	Phone Switch	4242	4242	4567A
47845	Deluxe Pager	4242	4242	N 20
48864	Entitlement testing	4242	4242	852258
49138	Test Equipment	4242	4242	258852
50526	Phone Mail	4242	4242	258741
50534	Phone Mail	4242	4242	985698
50542	Phone Mail	4242	4242	147741
50753	Phone Mail	4242	4242	1547854
52206	Phone Mail	4242	4242	963258

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

1. Select the Service tab and then click the Equipment Master link.

2. Click the record’s link under the Asset Number column to select an equipment record in the grid.
3. Review, and if necessary, modify the information.
4. Save the changes before exiting the form.

Reviewing Service Contract Information

Access the Customer - Manager <Customer Name> form.

Customer - Customer - Manage Capital Company

Customer | Contact and Partner | Activities | Sales | **Service** | Attachments

[Equipment Master](#) | **Service Contract** | [Case](#) | [Service Work Order](#)

Add Close

Search

Equipment Number <input type="text"/>	Customer Number <input type="text" value="4242"/>
Inventory Item Number <input type="text"/>	Site Number <input type="text"/>
Product Model <input type="text"/>	Contract Start Date <input type="text"/>
Product Family <input type="text"/>	Contract Completion Date <input type="text"/>

Select a Query Save Query Edit Queries

Find

Records 1 - 10

Order Number	Or Ty	Description	Contract Change Number	Customer Number	Site Number	Line Number	Ln Ty
1	CM	TV Set	001	4242	4242	0.001	BV
1	CM	Phone Switch	001	4242	4242	0.002	BV
1	CM	Deluxe Pager	001	4242	4242	0.003	BV
1	CM	Phone Mail	001	4242	4242	0.004	BV

Customer - Manager <Customer Name> form: Service tab: Service Contract link

1. Select the Service tab and then click the Service Contract link.
2. Select the service contract for which you want to view or modify service.
Make changes on the Customer - Contract Revisions form.
3. On Customer - Contract Revisions, review or modify the information.
4. Save changes before exiting the form.

See *PeopleSoft EnterpriseOne Service Management 8.11 SPI PeopleBook*, “Managing Contracts”.

Reviewing Case Information

Access the Customer - Manage <Customer Name> form. and select the Service tab.

1. Select the Service tab and then click the Case link.
2. In the grid, search for and select the case whose information you want to view or modify.
3. On Case Update, view or modify case information.
4. When you are finished viewing or modifying case information, save or undo any changes, and then click Close.

See *PeopleSoft EnterpriseOne Customer Relationship Management 8.11 SPI Support Applications PeopleBook*, “Entering Cases”.

Reviewing Service Work Order Information

Access the Customer - Manager <Customer Name> form.

1. Select the Service tab and then click the Service Work Orders link.
2. Select the service work order that you want to review.
3. On the Customer - Work Order Revisions form, review or modify the information, and save all changes before you exit the form.
4. To add a service contract, click Add and enter information on the Add Work Order form.

See *PeopleSoft EnterpriseOne Service Management 8.11 SPI PeopleBook*, “Managing Work Orders”.

CHAPTER 6

Managing Partners

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

- Enter basic partner information.
- Manage partner information.

Understanding Partner Information

You use the Address Book Revisions program (P01012) to enter and maintain partner information. The P01012 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 P01012 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.

See *PeopleSoft EnterpriseOne Address Book 8.11 SP1 PeopleBook*, “Entering Address Book Records,” Entering Address Book Records.

View Partners

You can also view general partner information or 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.

You can access partner records from customer, employee, item, lead, case, opportunities, and activity records. 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.

Entering Basic Partner Information

This section provides an overview of partner entry, lists a prerequisite and discusses how to add a new partner record.

Understanding Partner Entry

You use the Address Book Revisions program (P01012) to enter and maintain information about partners. When you enter address book records, you define the type of record by adding a search type to the record. Typically, you use search type *PA* for partners. A version of the P01012 that is set up to automatically use search type *PA* is attached to the CRM Foundation Daily Processing menu (G90C01).

See Also

PeopleSoft EnterpriseOne Address Book 8.11 SP1 PeopleBook, “Entering Address Book Records,” Entering Address Book Records

Prerequisite

Set the processing options for the Address Book Revisions program (P01012).

See *PeopleSoft EnterpriseOne Address Book 8.11 SP1 PeopleBook*, “Entering Address Book Records,” Setting Processing Options for Address Book Revisions (P01012).

Form Used to Enter Partners

Form Name	FormID	Navigation	Usage
Partner - Work With Addresses	W01012B	CRM Foundation Daily Processing (G90C01), Partner	Find existing partners or access forms to add new partners.
Partner - Address Book Revision	W01012A	On Partner - Work With Addresses, click Add.	Enter basic partner information.

Adding a New Partner Record

Access the Partner - Work With Addresses form.

Partner - Address Book Revision

OK Cancel Form Tools

Address Number

Select Tab: 1-Address Book

Alpha Name *

Long Address Number

Tax ID

Search Type *

Business Unit

Partner - Address Book Revision form

Address Book

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	
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	
Payables Y/N/M	<p>Enter the code that identifies the address as a supplier. Values are:</p> <p><i>Y</i>: Yes, this is a supplier. A processing option specifies whether the supplier master record appears automatically after you add an address.</p> <p><i>N</i>: 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.</p> <p><i>M</i>: This is a miscellaneous, one-time supplier. This code does not prevent you from entering multiple vouchers for the address.</p> <p><i>F</i>: 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.</p>
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 AR and AP 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	<p>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:</p> <p>Blank or <i>C</i>: Corporate entity (the Tax ID prints as 12-3456789)</p> <p><i>P</i>: Individual (the Tax ID prints as 123-45-6789)</p>

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

Values for non-U.S. entities are:

- I*: 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:

- I*: 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 the 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 the 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

Classification Code 01–05

Enter any codes used to classify an address book entity.

Ticker	Enter the stock ticker symbol for the company.
Stock Exchange	Enter the exchange under which the company's stock is listed.
Year Started	Enter 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	Enter the Dun and Bradstreet identifier used to receive credit reports for companies.

Related Address

Parent Number	<p>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:</p> <ul style="list-style-type: none"> 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

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).
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Managing Partner Information

This section provides an overview of partner management and discusses how to:

- Assign partners to employees, customers, leads or items.
- Assign partners to cases, opportunities or activities.
- Assigning partner contacts to cases or activities.
- Assigning partner contacts to opportunities.

Understanding Partner Management

After you enter partners into the system, you can track and maintain information about those partners. You can associate a partner with a customer, employee, item, lead, opportunity, case, 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.

Form Used to Manage Partner Information

Form Name	FormID	Navigation	Usage
Partner - Work With Addresses	W01012B	CRM Foundation Daily Processing (G90C01), Partner	Find existing partners or access forms to add new partners.
Partner - Address Book Revision	W01012A	On Partner - Work With Partner, select the partner you want to review.	Find and select a partner.
Search for Employee	W90CA040F	CRM Foundation Daily Processing (G90C01), Employee	Select an employee.
Employee - Manage <Employee Name>	W90CA04RA	On Search for Employees, select an employee, select the Customer and Partner tab, and then click the Partner link	Assign a partner to an employee or view currently assigned partners.
Search for Customers	W90CA080D	CRM Foundation Daily Processing (G90C01), Customer	Select a customer.
Customer - Manage <Customer Name>	W90CA08RA	On Search for Customers, select a customer, select the Contact and Partner tab, and then click the Partner link.	Assign a partner to a customer or view currently assigned partners.

Page Name	Object Name	Navigation	Usage
Search for Leads	W90CB010A	Daily Sales Force Automation Processing (G90CA01), Lead	Select a lead
Lead - Manage <Lead Name>	W90CB010L	On Search for Leads, select a lead, then select the Contact and Partner tab, and then click the Partner link.	Assign a partner to a lead or view currently assigned partners.
Search For Items	W90CA100D	CRM Foundation Daily Processing (G90C01), Item Inquiry	Select an item.
Item - Manage <Item Name>	W90CA109A	On Search For Items, select an item and then click the Partner tab.	Assign a partner to an item or view currently assigned partners.
Search For Opportunities	W90CB020D	Daily Sales Force Automation Processing (G90CA01), Opportunity	Select an opportunity.
Opportunity - Manage <Opportunity Name>	W90CB020A	On Search For Opportunities select an opportunity.	View or update the partner and partner contact currently assigned to the opportunity.
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.
Search For Activities	W01301E	CRM Foundation Daily Processing (G90C01), Activity	Select an activity.
Activity - Edit <Activity Name>	W01301B	On Search For Activities, select an activity and then click the Partner Contact link.	View or modify the partner contact.
Work With Case Management	W17500A	Daily Case Processing (G17132), Case Entry.	Select a case.
Case Entry - Manage Case	W90CG501J	On Work With Case Management, select a case and then select the Additional Information tab.	View the partner and partner contact associated with a case.

Assigning Partners to 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.

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

Assigning Partners to 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.

Assigning Partner Contacts to 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.

Assigning Partner Contacts to 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 7

Managing Contacts

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

- Enter contact information.
- Manage contact information.
- Manage contact activities.

Understanding Contact Information

Contacts are the people who are associated with the organization's customers and partners. You use the CRM Contact program (P90CA070) to enter contacts and to view and modify existing contact information.

The CRM Contact program is also an entry point for the Email Merge and Mail Merge features. These features enable you to create customized email messages and letters for a selected group of contacts. Before you can use either of these features, you must create at least one contact.

Contact information includes:

- Basic contact information.

You can enter the contact's name, position, address and phone information. You can also associate the contact with other related people.

- Activity information.

You can create activities for a contact, or attach existing activities to the contact. Activities enable the organization to complete tasks in a timely manner.

- Sales information.

You can review the sales pipeline, sales opportunities, sales quotes, and sales orders that are associated with the contact.

- Service information.

You can review the cases that are associated with the contact.

- Attachments.

You can view, modify, or enter attachments for the contact.

- Subscriptions.

You can subscribe to the contact to add the information about that contact to the personal information management (PIM) system, such as Lotus Notes or Microsoft Exchange.

- Profiles.

Because each organization's business needs differ, it is impossible to anticipate every piece of data that you must track for the contacts. To enable you to track contact information that is specific to the organization, the PeopleSoft EnterpriseOne Customer Relationship Management Foundation system provides you with configurable, user-defined contact profiling. You can access up to 30 user-defined fields using the Profiles link on the Contact - Manage <Contact Name> form. You can configure these fields to track information that is specific to the business and is not otherwise captured in the PeopleSoft EnterpriseOne system.

Entering Contact Information

This section provides an overview of contact information, and discusses how to:

- Enter contacts.
- Set processing options for the CRM Contact program (P90CA070).

Forms Used to Enter Contact Information

Form Name	FormID	Navigation	Usage
Search for Contacts	W90CA070C	CRM Foundation Daily Processing (G90C01), Contact	Select an existing contact, or access forms to add new contacts.
Add Contact	W90CA070A	Click Add on Search for Contacts.	Enter contact information.

Entering Contacts

Access the Add Contact form.

Contact - Add Contact

Address Number *
 Alpha Name *
 Mailing Name
 Title

Address Type *Bill To*
 Address Line 1
 Address Line 2
 Address Line 3
 Address Line 4

City State *Colorado*
 Postal Code Country *Default Country*
 County

Phone Number Type *Business*
 Phone Prefix Phone Number

External Email

Function

Department

Add Contact form

- 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.
- Function** Enter the user-defined code (system 01, type FC) that indicates the function that 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 user-defined information in any of the category code fields. You can also use these fields to represent associated names in the Who's Who list. You can use these codes to identify names for special mailing lists, phone directories, and so on.

Setting Processing Options for the Manage Contacts Application (P90CA070)

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

Versions

- | | |
|--|---|
| 1. Contact Detail Processing (P90CA074) Version | Specify the version of Contact Detail Processing (P90CA074) to use. If this processing option is blank, the system uses version <i>ZJDE0001</i> . |
| 2. Sales Order Entry (P42101) Version | Specify the version of Sales Order Entry (P42101) to use. If this processing option is blank, the system uses version <i>ZJDE0001</i> . |
| 3. Quote Order Entry (P42101) Version | Specify the version of Quote Order Entry (P42101) to use. If this processing option is blank, the system uses version <i>ZJDE0001</i> . |
| 4. Opportunities (PP90CB020) Version | Specify the version of Opportunities (P90CA020) to use. If this processing option is blank, the system uses version <i>ZJDE0001</i> . |

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), 2. Alternate Address Action Security (Add, Change, and Delete), 3. Phone and Fax Action Security (Add, Change, and Delete), 4. Electronic Address Action Security (Add, Change, and Delete), 5. Related People Action Security (Add, Change, and Delete), and 6. Related People Phone and Fax Action Security (Add, Change, and Delete) | Specify whether a user has the authority to add, change, or delete contact information, alternate addresses, contact phone and fax numbers, electronic addresses, related people, or phone and fax numbers for related people while running on a mobile client. |
|--|---|

Managing Contact Information

This section provides an overview of contact management and discusses how to:

- Modify contact address information.
- Modify contact phone and electronic address information.
- Enter related people for a contact.
- Subscribe to multiple contacts.
- Manage contact interactions.
- Create contact profiles.

Understanding Contact Management

After you enter contacts into the system, you must maintain the records to ensure that the information in the system is current. You can modify address, phone, and email information for each contact. You can also associate contacts with related people such as employees, partner contacts, or customer contacts.

You can also subscribe to one or more contacts. Subscribing to a contact enables users to add contact information to their personal information management (PIM) systems, such as Lotus Notes or Microsoft Exchange.

You can create contact profiles for each contact to store additional information that is not already maintained in the PeopleSoft EnterpriseOne system. Profiles enable you to track the information that is critical to the organization's business needs by providing up to 30 configurable fields to store user-defined data.

Lastly, you can manage contact interactions using a third-party system, Apropos. Apropos enables you to manage and schedule each interaction with a contact.

See The Apropos Website at www.apropos.com for more information about the integrated interaction product.

Subscribing to Contacts

You can subscribe to contacts to add their contact information to the personal information management (PIM) system.

PeopleSoft EnterpriseOne provides the ability to synchronize user data between third-party PIM systems and PeopleSoft EnterpriseOne Customer Relationship Management users. With this synchronization, Customer Relationship Management users can share and manage personal information such as customer and contact information, which is stored in IBM Domino or Microsoft Exchange PIM systems.

Using the PIM Subscription option, users can automatically add a customer record to their personal contacts in Lotus Notes or Microsoft Exchange or Outlook. When they subscribe to a customer, the system creates corresponding objects in the PIM system database. If users update or delete items in either the CRM or PIM system, the system synchronizes changes in both locations. For example, if you change the phone number or address for a customer in the PIM system, the system reflects that change in the PeopleSoft EnterpriseOne customer record. The system writes inbound PIM changes to the F01161 table.

Before users can subscribe to a customer, they must be set up as PIM users. Once set up, PIM users can subscribe to contacts using these methods:

- Subscribe to a single customer.

The user can select the PIM Subscription option on the Customer - Manage <Customer Name> form. Use this method to subscribe to a customer with which you are not associated.

- Subscribe to multiple contacts at one time.

The user can select the PIM Subscription link on the Search for Contacts form to select from a list of contacts who are associated with customers with which the user is associated. For example, when a sales representative selects the PIM Subscription link, the system displays all of the customer records in which they are included as an active member of the sales team. The sales representative can then subscribe to any or all of the contacts in the list.

Each PIM user can subscribe to each customer record. The PIM Subscription option is selected or deselected based on the logged-in user who is viewing the customer record. For example, if User A subscribes to Customer 123, the PIM Subscription option is selected each time User A views Customer 123's record. However, if User B has not yet subscribed to Customer 123, the PIM Subscription option is not selected when User B views Customer 123's record. User B can select the option to subscribe to Customer 123.

PeopleSoft EnterpriseOne relies on a third-party software product, Intellisync Server, to enable data synchronization between PeopleSoft EnterpriseOne CRM and PIM systems. You must set up the Intellisync Server, the PIM system, and PeopleSoft EnterpriseOne users before you can use PIM synchronization functionality. Typically a system administrator completes these tasks.

See *PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: System Administration*

Forms Used to Manage Contact Information

Form Name	FormID	Navigation	Usage
Contact - Search For Contacts	W90CA070C	<ul style="list-style-type: none"> Daily Sales Force Automation Processing (G90CA01), Contact. CRM Foundation Daily Processing (G90C01), Contact. Daily Support Processing (G90CE01), Contact. 	Find and select the contact whose information you want to view.
Contact - Manage <Contact Name>	W90CA070B	On Search for Contacts, select a contact.	View contact information.
Contact - Add Related Person	W90CA073B	On the Contact - Manage <Contact Name> form, select the Contact tab, click Related People and then click Add.	Add a related person to the contact.

Modifying Contact Address Information

Access the Contact - Manage <Contact Name> form.

- On the Contact tab, click the Address and Phone link.
- To modify an existing address record, select the record in the Alternate Addresses grid and then make changes in the grid fields.
- To delete an address record, select the record in the Alternate Addresses grid and then click Delete.
- To add address information, select a blank line in the grid and enter address information in the grid fields.
- If there is more than one address for the contact, select an address and click Set Main Address to specify the main address.

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

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

The system clears the previous main address and selects the new main address. To clear the main address setting without specifying a main address, click the Clear Main Address button.

Contact - Contact - Manage Bob Willis

[Contact](#) | [Activities](#) | [Sales](#) | [Service](#) | [Attachments](#)

[Detail](#) | **[Address and Phone](#)** | [Related People](#) | [Profile](#)

Alternate Addresses

Records 1 - 3

		Address Type	Address Type Description	Address Line 1
<input type="radio"/>		B	Bill To	200 Corporate Drive
<input type="radio"/>		O	Office	400 Industry Way
<input checked="" type="radio"/>		<input type="text"/>		<input type="text"/>

Phones And Fax

Records 1 - 3

		Phone Type	Phone Description	Phone Prefix	Phone Number
<input type="radio"/>			Business	303	555-7896
<input checked="" type="radio"/>		<input type="text" value="12"/>	Cellular	<input type="text" value="303"/>	<input type="text" value="555-5555"/>
<input type="radio"/>					

Contact - Manage <Contact Name> form: Contact tab: Address and Phone link

Modifying Contact Phone and Electronic Address Information

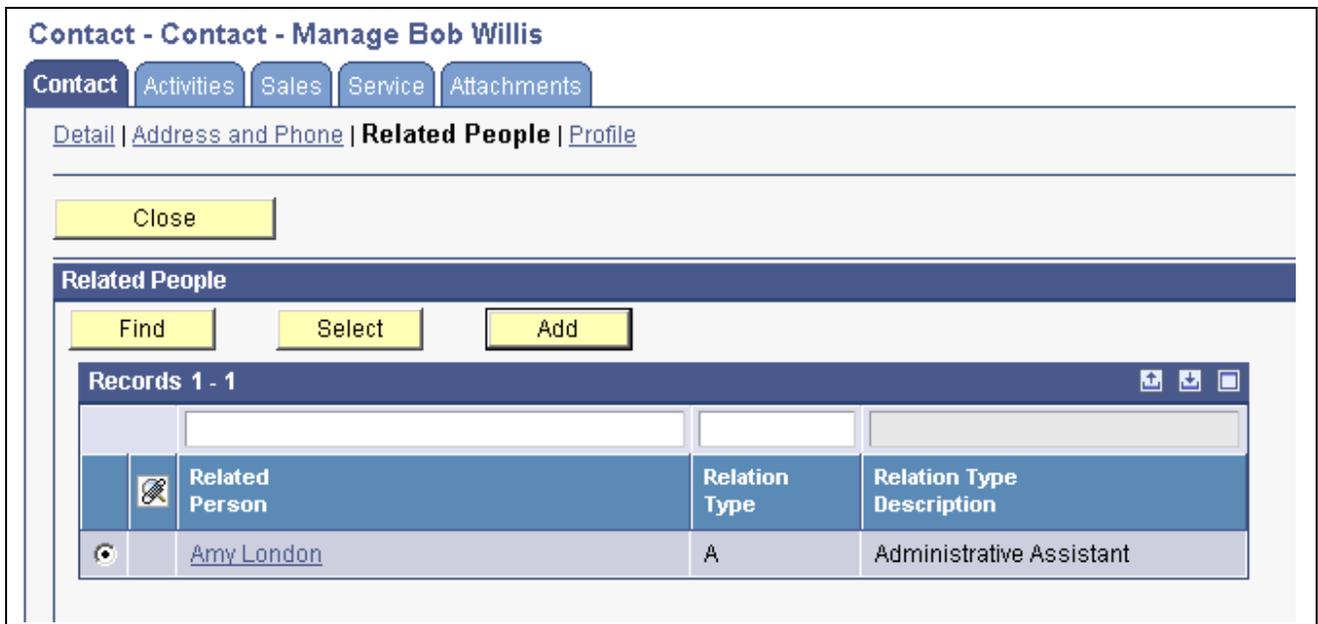
Access the Contact - Manage <Contact Name> form and click the Address and Phone link.

- 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.
- 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 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 that you just added.

Enter Related People for a Contact

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



Contact - Manage <Contact Name> form: Contact tab: 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 cannot 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.

Subscribing to Multiple Contacts

Access the PIM Subscription form.

1. Select one of these options to determine which contacts the system displays:
 - Show All
 - Show Subscribed Only
 - Show Unsubscribed Only
2. Select the contacts to which you want to subscribe, or deselect contacts to which you want to unsubscribe.
3. Click OK to save the subscription changes and then click Cancel to return to the Search for Contacts form.

Managing 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 pop-ups, 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.

Creating Contact Profiles

Access the Contact - Manage <Contact Name> form. Select the Detail tab and click the Profile link.

Contact - Contact - Manage Bob Willis

[Contact](#)
[Activities](#)
[Sales](#)
[Service](#)
[Attachments](#)

[Detail](#) | [Address and Phone](#) | [Related People](#) | **[Profile](#)**

Profiling - UDC 1	<input type="text" value="-- Select One --"/>	Profiling - UDC 9	<input type="text" value="-- Select One --"/>
Profiling - UDC 2	<input type="text" value="-- Select One --"/>	Profiling - UDC 10	<input type="text" value="-- Select One --"/>
Profiling - UDC 3	<input type="text" value="-- Select One --"/>	Profiling - UDC 11	<input type="text" value="-- Select One --"/>
Profiling - UDC 4	<input type="text" value="-- Select One --"/>	Profiling - UDC 12	<input type="text" value="-- Select One --"/>
Profiling - UDC 5	<input type="text" value="-- Select One --"/>	Profiling - UDC 13	<input type="text" value="-- Select One --"/>
Profiling - UDC 6	<input type="text" value="-- Select One --"/>	Profiling - UDC 14	<input type="text" value="-- Select One --"/>
Profiling - UDC 7	<input type="text" value="-- Select One --"/>	Profiling - UDC 15	<input type="text" value="-- Select One --"/>
Profiling - UDC 8	<input type="text" value="-- Select One --"/>		
Profiling - Text 1	<input type="text"/>		
Profiling - Text 1	<input type="text"/>		
Profiling - Text 3	<input type="text"/>		
Profiling - Text 4	<input type="text"/>		
Profiling - Text 5	<input type="text"/>		

Contact - Manage <Contact Name> form: Detail tab: Profile link

Note. You can configure each field on this form to store the data that the organization must track for each contact. Before you enter data on this form, you should define the needs of the organization, and configure the fields accordingly. Typically, the system administrator is responsible for configuring user-defined fields.

See *PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: System Administration*

Managing Contact Activities

This section provides an overview of contact activities 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.

Understanding Contact Activities

The fields, grids, and links on the Activity tab enable you to view or modify activities that relate 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 displayed 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	FormID	Navigation	Usage
Contact - Search For Contacts	W90CA070C	<ul style="list-style-type: none"> Daily Sales Force Automation Processing (G90CA01), Contact. CRM Foundation Daily Processing (G90C01), Contact. Daily Support Processing (G90CE01), Contact. 	Find and select the contact whose information you want to view.
Contact - Manage <Contact Name>	W90CA070B	On Search for Contacts, select a contact.	View contact information.
Activity - Edit	W01301B	Select an activity record on Contact - Manage <Contact Name> form, Activities tab, Activity link.	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 might 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 - Contact - Manage Bill Fold

[Contact](#) | **Activities** | [Sales](#) | [Service](#) | [Attachments](#)

Activities | [Email](#)

Close

Search

Start Date Range: 10/20/04 End Date Range: 10/20/04
 Activity Type: -- Select One -- Calendar Type: -- Select One --
 Priority Level: -- Select One -- Date Completed:

Find Select Add

Records 1 - 9

	Activity Type	Task	Subject	Start Date	End Date
<input checked="" type="radio"/>	Meeting	<input type="checkbox"/>	meeting	09/08/04 11:00:00 UTC	
<input type="radio"/>	Meeting	<input type="checkbox"/>	UE Review Review	09/01/04 15:00:00 UTC	
<input type="radio"/>	Meeting	<input type="checkbox"/>	test	09/05/04 01:12:00 UTC	
<input type="radio"/>	Meeting	<input type="checkbox"/>	Recurring	09/08/04 12:00:00 UTC	
<input type="radio"/>	Call	<input type="checkbox"/>	New product	08/31/04 14:00:00 UTC	
<input type="radio"/>	Call	<input type="checkbox"/>	New product call	09/17/04 14:00:00 UTC	

Contact - Manage <Contact Name> form: Activities tab: Activities link

See *PeopleSoft EnterpriseOne Address Book 8.11 SPI PeopleBook*, “Using Foundation Calendar,” Creating Activities and Tasks.

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, the system associates it with the contact.

Add Activity

Save and Close Undo Changes Cancel

Activity Details Recurrence Attachments Advanced Category Codes

Subject * Contract Negotiations Location Bob's office

Activity Type * Meeting

Date * 20/06/05 Start Time 9:00 A.M. All Day

End Date 20/06/05 End Time 11:00 A.M.

Priority Level 2 - Medium Entered By 5961687 Megan

Customer Partner 10107 Bob Willis Sunshine... Partner Contact 1 Bob Willis

Completed

Remind Remind 1 Days Before

Description Negotiate pricing and service details for contract.

Add Activity form

Linking the Activity to an Action Plan

Access the Contact - Manage <Contact Name> form and click the Activities tab.

1. In the grid, find and select the activity that 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 the action plans to which you want to link the activity, and then click Select.

Action Plan Search & Select

Select Find Close Tools

Action Plan Name *

Records 1 - 20

Action Plan ID	Action Plan Name	Action Plan Description
<input type="radio"/>	11 Action Plan System Testing	Test Action Plan
<input type="radio"/>	12 Call Plan Action Plan	Call Plan Action Plan testing
<input type="radio"/>	13 Meg's Action Plan	Meg's Action Plan testing

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 that specific email 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.

CHAPTER 8

Using Call Plans

This chapter provides an overview of call plans and discusses how to:

- Create new call plan templates.
- Work with call plan templates.

Understanding Call Plans

Call plans enable sales representatives making customer calls to view a template containing question prompts, goals, and reminders. You first create call plan templates to meet the business needs, and then you can attach them to activities and action plans within the Calendar system.

Creating New Call Plan Templates

This section provides an overview of call plan templates and describes how to create a new call plan template.

Understanding Call Plan Templates

Use the Call Plan program (P90CA65) to create call plan templates for different purposes. For example, you might have a new customer template, a template for introducing new products, one for unhooking competitors' customers, and so on.

The only required field when creating a new template is the Name field. However, you might also want to enter values in the Purpose and Premise fields, as these fields appear on the grid when you search for call plan templates from the Activity and Action Plan programs.

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	FormID	Navigation	Usage
Search For Call Plan	W90CA65F	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.

Call Plan - Add Call Plan

Default Template

Name ★

Purpose

Ask

Action

Attitude

Ability

Premise

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 the ability to meet the customer's needs.
Premise	Enter the broader purpose of the call, such as to establish a long term relationship.

Working With Call Plan Templates

This section provides an overview of how to work with call plans, lists a prerequisite, and discusses how to attach a call plan to an activity.

Understanding Working With Call Plans

After creating call plan templates, you can attach them to activities that you create within the Calendar system. When creating the activity, you can set up recurrence patterns and reminders, and you can assign the activity to others. If a particular call plan is part of a group of standard activities that would be performed for multiple customers, you can create an action plan that includes the call plan activity. Action plans are groups of related activities that can be used as templates.

When viewing the call plan templates from within either an activity or action plan, 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 the changes, the system attaches a copy of the call plan template to the activity or action plan, and the original call plan template is not affected.

See *PeopleSoft EnterpriseOne Address Book 8.11 SP1 PeopleBook*, “Using Foundation Calendar,” Understanding Foundation Calendar.

See *PeopleSoft EnterpriseOne Address Book 8.11 SP1 PeopleBook*, “Using Foundation Calendar,” Creating Activities and Tasks.

See *PeopleSoft EnterpriseOne Address Book 8.11 SP1 PeopleBook*, “Using Foundation Calendar,” Creating Action Plans.

Prerequisite

Before you complete the steps in this section, you must set the processing options for the Activity View program.

See *PeopleSoft EnterpriseOne Address Book 8.11 SP1 PeopleBook*, “Using Foundation Calendar,” Setting Processing Options for Activity View (P01301).

Forms Used to Work with Call Plan Templates

Form Name	FormID	Navigation	Usage
Edit <Call Name>	W01301B	<ul style="list-style-type: none"> Daily Sales Force Automation Processing (G90CA01), Activity. Select the <i>Call</i> activity type and click Find on the Search for Activities form. Select the desired activity. Daily Sales Force Automation Processing (G90CA01), Calendar. Click the activity link on the Calendar form. 	Review the activity and click Call Plan to view the call plan template.
Manage <call plan name>	W90CA65C	Click Call Plan on the Edit <call plan name> form.	Review the call plan template. Change the call plan template for this activity only.
Add Activity	W01301B	Click Add on the Search for Activities form.	Add a new activity and attach a call plan.
Call Plan Template Select	W90CA65E	Click Call Plan. on the Edit <Activity Name> form.	Select the call plan template to use for the activity.

Attaching a Call Plan to an Activity

Access the Add Activity form.

Activity - Add Activity

Subject *	Customer Call	Location	office
Activity Type *	Call	Call Plan	
Date *	19/05/05	Start Time	: -- Select <input type="checkbox"/> All Day
End Date	19/05/05	End Time	: -- Select
Priority Level	2 - Medium	Entered By	5961687 Megan
Customer		Customer Contact	
Partner		Partner Contact	

Completed
 Remind

Description

Add Activity (1 of 2)

Add Activity Assignment

Records 1 - 2

	Identifier *	Identifier Description	Calendar Type	Completed Activity
<input checked="" type="radio"/>			CRM Calendar	<input type="checkbox"/>
<input type="radio"/>				<input type="checkbox"/>

Add Activity (2 of 2)

With the exception of the Call Plan field, the fields that appear on Add Activity form are the same as those that appear when you access the form from the Activity View program (P01301) on the Foundation Calendar menu (G01A).

Activity Type

Select an activity type of *Call*. After you attach a call plan to the activity, you cannot change the activity type.

Call Plan

Select a call plan for the activity. The system displays this field only when you have selected *Call* as the activity type.

After you have saved the activity, subsequent inquiries on the activity will display Call Plan as a link that you can click to view the call plan template.

See *PeopleSoft EnterpriseOne Address Book 8.11 SP1 PeopleBook*, “Using Foundation Calendar,” Creating Activities and Tasks.

CHAPTER 9

Using Email and Mail Merge

This chapter provides an overview of Email and Mail Merge, and discusses how to:

- Manage email groups.
- Manage emails.
- Use the email merge feature.
- Use the mail merge wizard.

Understanding Email and Mail Merge

The email feature is integrated into the PeopleSoft 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 the department.

As 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 PeopleSoft EnterpriseOne system information such as the recipient's name, address, and so on.

Managing Email Groups

This section provides an overviews of email groups and discusses how to:

- Create email groups.
- Maintain an email 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 Manage Email Groups

Form Name	FormID	Navigation	Usage
Search for Email Groups	W90CA510C	Sales Force Automation Setup (G90CA03), Email Group	Select an existing email group, or access forms to create a new group.
Add Email Group	W90CA510I	Click Add on the Search for Email Groups form.	Create an email group.
Email Group - Manage <Group Name>	W90CA510B	Select an email group on the Search for Email Groups form.	Maintain an email group.

Creating Email Groups

Access the Add Email Group form.

Email Group - Add Email Group

Group Name *

Group Type * *Public*

Comments

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).

Maintaining an Email 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 Group - Email Group - Manage Office Supply Customers

Detail

Group Name *

GROUP TYPE... *Public*

Comments

Email Group List

Records 1 - 1

<input type="checkbox"/>		Group Name	Comments
<input type="checkbox"/>		Client Listing	Contacts

Email Group - Manage <Group Name> form (1 of 2)



Email - Manage <Group Name> form (2 of 2)

Managing Emails

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 new 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	FormID	Navigation	Usage
Search for Emails	W90CA500E	<ul style="list-style-type: none"> • Daily Sales Force Automation Processing (G90CA01), Email • Daily Support Processing (G90CE01), Email 	Find and select existing email messages.
Add Email	W90CA500C	<ul style="list-style-type: none"> • 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 - Email - Manage May Office Supply Discounts

Detail | Attachments

Save Changes | Undo Changes | Send Email | Close

Status: Send individual email to recipients

Date Sent: Create activity for contacts

Subject *:

From:

Body *:

Email Group List

Records 1 - 1

Group Name	Comments
<input type="checkbox"/> Office Supply Customers	Group of customers who buy of

Add Email Group | Remove Email Group

Person List

No records fetched.

Alpha Name	E-Mail	Title
------------	--------	-------

Add Person | Remove Person

Email - Manage <Email Name> form

- 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.
- In the Email Group List and Person List grids, view or modify email groups and individual email recipients already added to the email message.
- 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.
- To view or modify attachment information for the email message, select the Attachments tab.
- 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.
- If you want to create an activity for each person in the Person List grid, select the option Create activity for contacts.
- 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.

Email - Add Email

Save and Close Save and Continue Save and Add New Cancel

Status Send individual email to recipients

Date Sent Create activity for contacts

Subject *

From

Body *

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 8.95 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.

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.

Created By Name	Date Entered	Date Sent	Status
Megan	20/06/05 15:25:52 UT		The email has not been sent.
Megan	20/06/05 15:28:57 UT	20/06/05 15:28:4	Send Error-Email has not been se

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 displays the current status for all emails that you found.

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	FormID	Navigation	Usage
Contact - Email and Mail Merge Utility	W90CA070D	Daily Sales Force Automation Processing (G90CA01), Contact CRM Foundation Daily Processing (G90C01), Contact 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.
Email - Manage <Email Name>	W90CA500A	On the Contact - Email and Mail Merge Utility form or the Employee - Email and Mail Merge Utility form, click Email Merge.	Create a new email.
Employee - Email Merge	W90CA040E	Periodic Sales Force Automation Processing (G90CA02), Employee 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.

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 9, "Using Email and Mail Merge," Inserting Tokens in the Email Body, page 118.](#)

- 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 lists 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 mail merges and discusses how to:

- Create mail merge and envelope templates.
- Process a mail merge.

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 use data sets and simple templates to set up mail merge and envelope templates. You use the same programs and processes to create templates for mail merges as you do for proposal generation. The only difference in the setup for mail merge or envelope/label templates is the template type. You use these template types for mail merge and envelope/label templates:

- *MM*: Use this template type when creating mail merge templates.
- *EN*: Use this template type when creating envelope/label templates.

After you set up mail merge templates, you can run 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.

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.

See Also

[Chapter 10, "Generating Proposals," page 123](#)

Forms Used to Use the Mail Merge Wizard

Form Name	FormID	Navigation	Usage
Mail Merge Setup	W90CA242B	Sales Force Automation Setup (G90CA03), Mail Merge Setup	Access forms to set up mail merge templates.
Envelope/Label Setup	W90CA242B	Sales Force Automation Setup (G90CA03), Envelope/Label Setup	Access forms to set up envelope and label templates.
Search For Contacts	W90CA070C	Daily Sales Force Automation Processing (G90CA01), Contact 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 whether you are using local or central templates for the mail merge.
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.

Creating Mail Merge and Envelope Templates

Access the Mail Merge Setup form.

To create Mail Merge templates, you use the same processes and programs that are used to create proposal generation templates. 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 or envelope and label 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

See Also

[Chapter 10, “Generating Proposals,” page 123](#)

Process 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 listed 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 the 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 the 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.

CHAPTER 10

Generating Proposals

This chapter provides an overview of proposal generation and discusses how to:

- Create simple templates.
- Create composite templates.
- Manage proposal templates.
- Create proposals.
- (Rapid Start CAN and USA) Generate proposals from quotes.

Understanding Proposal Generation

You can use the proposal generation feature to produce sales proposals from quotes or sales orders. Using the Proposal Generation Wizard program (P90CA24) you can mix and match document components, which enables you to specify everything that you want to include on the generated proposal.

The system uses simple and composite templates that let you easily define which templates to include in the proposal, and to specify the order in which the pieces appear. For example, the proposal you generate might include the address to which the order will be shipped, requested ship date, and special delivery instructions. Each of these items might be stored in separate templates. When you generate the proposal, you can select and sequence the appropriate templates.

To supplement the templates that PeopleSoft provides, you can easily create templates for general or specific use. You create templates by first creating RTF documents that are used in the template. RTF documents can consist of text and images. You then create a simple template and attach the associated RTF documents.

You can also create different versions of each RTF document and attach them to a simple template. The system determines which version to use for the proposal based on the data in the associated quote or sales order and the language preference of the sold to customer. You can create default versions along with additional versions that are based on:

- The ship to address on the quote or sales order, and the language preference that you associate with the sold to customer.
- The ship to address on the quote or sales order.
- The sold to address on the quote or sales order, and the language preference that you associate with the sold to customer.
- The sold to address on the quote or sales order.
- The branch/plant on the quote or sales order, and the language preference that you associate with the sold to customer.
- The branch/plant on the quote or sales order.

- The company on the quote or sales order, and the language preference that you associate with the sold to customer.
- The company on the quote or sales order.

After you create a proposal, the system attaches it to the associated quote or sales order as a media object, enabling you to make the proposal available online or to email the proposal.

Creating Simple Templates

This section provides an overview of simple templates and discusses how to:

- Create a data set.
- Create tags to insert in RTF documents.
- Create RTF documents.
- Creating a simple template header.
- Attach RTF documents to a simple template.

Understanding Simple Templates

Before you can generate a proposal, you must create a data set. You use data sets to group templates. For example, you might create a data set called Proposals and group all of the templates that are associated with proposals under the Proposal data set. After you create a data set, you can create simple templates by completing these steps:

1. Create tags to insert into RTF documents.

You create tags to retrieve data from the PeopleSoft EnterpriseOne system. You can insert tags into RTF documents. When the system generates a proposal, the system replaces the tag with the corresponding data from the PeopleSoft EnterpriseOne system.

2. Create RTF documents.

After you create tags, you can create RTF documents. These documents can contain text, images, and tags. You can create multiple versions of the same RTF document. For example, you might create documents such as HeaderEnglish.rtf or HeaderFrench.rtf. These documents contain the same information, but are written in different languages.

3. Create a simple template.

After you create tags and RTF documents, you can create a simple template. First, for example, you create the header. Then you can attach all of the RTF documents that you want to associate with the template. For example you might create a simple template called *Header* and attach HeaderEnglish.rtf and HeaderFrench.rtf. When you finish creating the template, you must activate it so that it is available during proposal generation.

You create RTF documents using an application such as Microsoft Word that can save documents in RTF format. The 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 PeopleSoft 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 PeopleSoft EnterpriseOne system. If you type a tag name in the RTF document without inserting the field, the system will not retrieve PeopleSoft EnterpriseOne data.

The system creates simple templates from these individual RTF documents. To be flexible, the RTF documents should not contain too much information. For example, you might want the company logo to reside in its own RTF document so you can place it anywhere in the generated proposal. If the logo is part of the company name and address, you cannot move it to another part of the generated proposal.

Creating Multiple Versions of RTF Documents

You might find that you want to create documents that differ slightly based on the customer for whom the proposal is generated, or the company or branch/plant from which the proposal is generated. For example, you might want to create a proposal in English for all customers whose language preference is English, and create the same proposal in French for all customers whose language preference is French. You can create multiple versions of the same RTF document and attach them to a simple template to create the same proposal in different languages.

When you attach RTF documents to a simple template, you enter key types and key values to differentiate the documents. Key type codes are stored in UDC (90CA/AK) and include:

- BR: Branch/Plant
- CO: Company
- DF: Default
- HT: Ship To
- ST: Sold To

Note. We recommend that you do not change the values in UDC (90CA/AK). Changing these values could result in the creation of incomplete proposals or errors during proposal generation.

After you assign the key type, you must also assign the key value. For example, if you enter *CO* as the key type, you must enter a valid company number as the key value. When the system generates a proposal, it compares the data on the associated quote or sales order to the key values on the available RTF documents. If the system finds a match, it uses the RTF document that is associated with that key value to generate the proposal. If you enter key type *DF*, the system automatically populates the key value with *Default*.

You can also associate a language preference with each RTF document. Language preferences enable you to produce the same proposal in different languages. If the sold to customer record does not include a language preference, the system selects the template that also has a blank language preference. If the sold to customer's language preference is blank, and no templates exist with a blank language preference, the system does not select a template and instead generates an incomplete proposal. We recommend that you set up default templates to ensure that the system creates complete templates when the language preference is not specified for a sold to customer.

The key value, language preference, and data on the associated quote or sales order determines which version of an RTF document to use when generating proposal. The system searches for RTF documents whose Key Value field matches the data on the associated quote or sales order. The system searches for RTF documents in hierarchical order according to this list:

1. Ship to customer with language preference.

If an RTF document exists with Key Type *HT*, a key value that is equal to the ship to customer's address book number, and language preference that matches the sold to customer's language preference, the system uses that RTF document. If no match is found, the system continues searching.

2. Ship to customer.

If an RTF document exists with Key Type *HT*, a key value that is equal to the ship to customer's address book number, and no language preference, the system uses that RTF document. If no match is found, the system continues searching.

3. Sold to customer with language preference.

If an RTF document exists with Key Type *ST*, a key value that is equal to the sold to customer's address book number, and language preference that matches the sold to customer's language preference, the system uses that RTF document. If no match is found, the system continues searching.

4. Sold to customer.

If an RTF document exists with Key Type *ST*, a key value that is equal to the sold to customer's address book number, and no language preference, the system uses that RTF document. If no match is found, the system continues searching.

5. Branch/plant with language preference.

If an RTF document exists with Key Type *BR*, a key value that is equal to the Branch/Plant field value from the quote or sales order, and a language preference that matches the sold to customer's language preference, the system uses that RTF document. If no match is found, the system continues searching.

6. Branch/plant.

If an RTF document exists with Key Type *BR*, a key value that is equal to the Branch/Plant field value from the quote or sales order, and no language preference, the system uses that RTF document. If no match is found, the system continues searching.

7. Company with language preference.

If an RTF document exists with Key Type *CO*, a key value that is equal to the Company field value from the quote or sales order, and language preference that matches the sold to customer's language preference, the system uses that RTF document. If no match is found, the system continues searching.

8. Company.

If an RTF document exists with Key Type *CO*, a key value that is equal to the Company field value from the quote or sales order, and no language preference, the system uses that RTF document. If no match is found, the system continues searching.

9. Default with language preference.

If an RTF document exists with Key Type *DF* and a language preference that matches the sold to customer's language preference, the system uses that RTF document. If no match is found, the system continues searching.

10. Default.

If no other match is found, the system uses the RTF document with Key Type *DF* and no language preference. Each simple template should include a default RTF document with no defined language preference.

Note. Each simple template should contain one default RTF document with no language preference. Creating a default RTF document enables the system to generate a proposal for all quotes and sales orders, regardless of company, branch/plant, sold or ship to address, or language preference.

This table illustrates examples of RTF documents that you might attach to a simple template:

Key Type	Key Value	Language Preference	RTF Document
DF (Default)	Default	Blank	Default.rtf
CO (Company)	00001	Blank	CO00001.rtf
CO (Company)	00001	F (French)	CO00001F.rtf
CO (Company)	00001	S (Spanish)	CO00001S.rtf
ST (Sold To)	12345	Blank	ST12345.rtf

Using the data in the previous table, these examples illustrate how the system selects RTF documents to generate proposals:

- You generate a proposal for a quote order where the sold to customer is 12345.
The system uses ST12345.rtf to generate this proposal.
- You generate a proposal for a sales order where the sold to customer is 11111, the language preference of customer 11111 is F (French), and the company that is associated with the order is 00001.
The system uses CO00001F.rtf to generate this proposal.
- You generate a proposal for a sales order where the sold to customer is 11111, the language preference of customer 11111 is F (French), and the company that is associated with the order is 00050.
The system uses Default.rtf to generate this proposal.

Note. You also use data sets and simple templates to create mail merges, envelopes, and labels.

See [Chapter 9, “Using Email and Mail Merge,” page 107](#).

Forms Used to Create Simple Templates

Form Name	FormID	Navigation	Usage
Proposal Generation Setup	W90CA242B	Sales Force Automation Setup menu (G90CA03), Proposal Generation Setup.	Access forms to add data sets, simple templates, and composite templates.
Search For Data Sets	W980040E	Click the Step 1 - Data Set Administration button on the Proposal Generation Setup form.	Search for existing data sets, or access forms to add new data sets.
Add Data Set Header	W980040D	Click Add on Search For Data Sets.	Add a new data set.
Search For Proposal Generation Simple Templates	W90CA242A	Click the Step 2 - Simple Template Administration button on the Proposal Generation Setup form.	Access forms to add, modify, or delete simple templates. Additionally, you can activate or deactivate a template using the Change Status Row menu option.
Add Proposal Generation Simple Template	W90CA242D	Click Add on Search For Proposal Generation Simple Template.	Add a new simple template.
Manage Simple Template - <Template Description>	W90CA242D	Click Save and Continue on the Add Simple Template form, or select a simple template from the Search For Proposal Generation Simple Templates form.	Attach RTF documents to a simple template.

Creating a Data Set

Access the Add Data Set Header form.

Proposal Generation Setup - Add Data Set Header

OK Cancel Tools

Data Set Name *

Description *

Product Code *

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 that is associated with the data set.

Creating Tags to Insert in RTF Documents

Launch Microsoft Word or any other application that allows you to save documents in RTF format. (For the remainder of these instructions, Microsoft 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 each tag that you want to use.
6. When you are finished adding tags, click OK.

General Tag Name	Description
Quote	Inserts the Key Company 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

Tag Titles	
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 (F006) Tags	
BUMCostCenter	BUMInvstmtSummurizaMeth
BUMCostCenterType	BUMGLBankAccount
BUMDescriptionCompressed	BUMDatePlannedStartJ
BUMCompany	BUMDateActualStartJ
BUMAddressNumber	BUMDatePlannedCompleteJ
BUMAddressNumberJobAr	BUMDateActualCompleteJ
BUMCounty	BUMDateOther5J
BUMState	BUMDateOther6J
BUMTaxArea	BUMDteFinalPaymntJulian
BUMTaxEntity	BUMAmtCostAtCompletion
BUMTaxArea1	BUMAmtProfitAtCompletion
BUMAllocaSummurizaMeth	

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 quote or sales order, while the Quote Detail template references specific line items associated with a quote or sales order:

Quote Summary Template Fields	
Quote (Quote)	Quotedate (Month/Day/Year)
Purchase Order (SOHReference1)	TType (SOHOrderType)
TTCancelledDate (SOHCancelDate)	TTSoldTo (ABMSoldToNameAlpha)
TTSoldToAttention (SOHShipToAttention)	TTSoldToContact (SoldToNameMailing)
SoldToAddressLine1	SoldToAddressLine2
SoldToAddressLine3	SoldToAddressLine4
SoldToCity1	SoldToState
SoldToCountyAddress	SoldToZipcode
SoldToCountry	TTShipTo (ABMShipToNameAlpha)
TTShipToAttention (SOHShipToAttention)	ShipToContact (ShipToNameMailing)
ShipToAddressLine1	ShipToAddressLine2

Quote Summary Template Fields	
ShipToAddressLine3	ShipToAddressLine4
ShipToCity1	ShipToState
ShipToCountyAddress	ShipToZipcode
ShipToCountry	TTLineItemTotal (SODDerivedLineItemTotal)
SOHCurrencyCodeFrom	TTItem
TTDescription	TTQuantity
TTUOM	TTUnitPrice
TTExtendedAmount	

Creating RTF Documents

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, graphic files, URLs, website links, or anything else that can be imported into the Microsoft Word file.
3. Place the cursor where you want to insert a tag and select Field from the Insert menu.
4. In the Field Names field, select DocProperty to display a list of available tags.
The tags that you previously created should be available.
5. Select from the Property list the tag that you want to insert.
6. Click OK.
7. Repeat steps 3 through 6 to insert additional tags in the RTF document.
8. Save the document, making sure to assign a name that will help you identify the file contents when you create templates.
9. Note the location where the document resides, as you will need this information later in the process.

You can insert general tags that retrieve the quote number or date. You can also insert tag names that retrieve values from specific PeopleSoft EnterpriseOne fields 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*). In this example, you type *TTType:* directly into the document and insert field *SOHOrderType*.

Creating a Simple Template Header

Access the Add Proposal Generation Simple Template form.

Proposal Generation Setup - Add Proposal Generation Simple Template

Save and Continue Cancel

Template ID *	<input type="text" value="HEADERS"/>	
Description *	<input type="text" value="Header Template"/>	
Product Code *	<input type="text" value="90CA"/>	CRM Foundation
Data Set Name *	<input type="text" value="OFFICESUPPL"/> <input type="button" value="Q"/>	Office Supply Proposal Data Se
Template Type *	<input type="text" value="PG"/>	Proposal Generation
Task Status *	<input type="text"/>	

Add Proposal Generation Simple Template form

- Template ID** Enter the template name or identifier.
- Description** Enter a name or brief description of the template contents. For example, if you are creating a simple template that contains header information that can be used for any proposal, enter *Generic Header*.
- Product Code** Enter the product that is associated with the template. This field is informational only and does not control any data processing. You can use this field to group templates.
- Data Set Name** Enter the data set that is used by the template. You use data sets to group templates.
- Template Type** Review the value in this field. The system automatically populates this value using the data in the processing options. If you are creating proposal generation templates, the system enters *PG* in this field. Values are:
PG: Proposal Generation
DG: Document Generation
EN: Envelopes
MM: Mail Merge
- Task Status** Review this field to determine whether the template is active. Only active templates are available during proposal generations. Values are:
- *AV*: Available
 - *IN*: Inactive

Attaching RTF Documents to a Simple Template

Access the Manage Simple Template - <Template Name> form.

Proposal Generation Setup - Manage Simple Template - Header

Save and Close Cancel

Template ID * HEADER
 Description * Header
 Product Code * 42B Sales Order Entry
 Data Set Name * LMF
 Template Type * PG Proposal Generation
 Task Status * NA Not Active

Records 1 - 3

	Key Type	Key Type Description	Key Value *	Description	Language	Language Description	Template Name	F90CA24E Version
<input checked="" type="radio"/>	CO	Company	00050	Project Management C			Co50Header.rtf	2
<input type="radio"/>	DF	Default	Default				Header.rtf	1
<input type="radio"/>								

Choose Template Download Template Delete

Manage Simple Template - <Template Name> form

1. Complete the Key Type field to specify what data the system uses to determine whether to use the RTF document.

For example, if you want to use this RTF document for proposals that are generated by Company 00001, enter *CO* in this field and enter *00001* in the Key Value field.

Values include:

- BR: Branch/Plant
- CO: Company
- DF: Default
- HT: Ship To
- ST: Sold To

2. Complete the Key Value field with a value that is associated with the key type.

For example, if you entered *CO* in the Key Type field, enter a valid company number in this field. The system uses the RTF document that you associate with this record only when generating proposals for quotes or sales orders that have this company number in the Company field.

If you enter *HT* in the Key Type field, enter a valid ship to customer number. The system uses the RTF document that you associate with this record only when generating proposals for quotes or sales orders that include this customer number in the Ship To field.

If you enter *DF* in the Key Type field, the system automatically populates this field with *Default*.

3. To specify that the system use the RTF document that you associate with this record only for proposals whose sold to customer has a specific language preference, complete the Language field.

To disregard language preference for this RTF document, leave the Language field blank.

4. Click the Choose Template button and navigate to and select the RTF document that you want to attach to the template.

5. To attach additional RTF documents, complete steps 1 through 4.
6. Click Save and Close to return to the Work With Simple Header Templates form.
7. On Work With Simple Header Templates, select the template that you just created and then select Change Status from the Row menu to make the template active.

Creating Composite Templates

This section provides an overview of composite templates and discusses how to create a composite template.

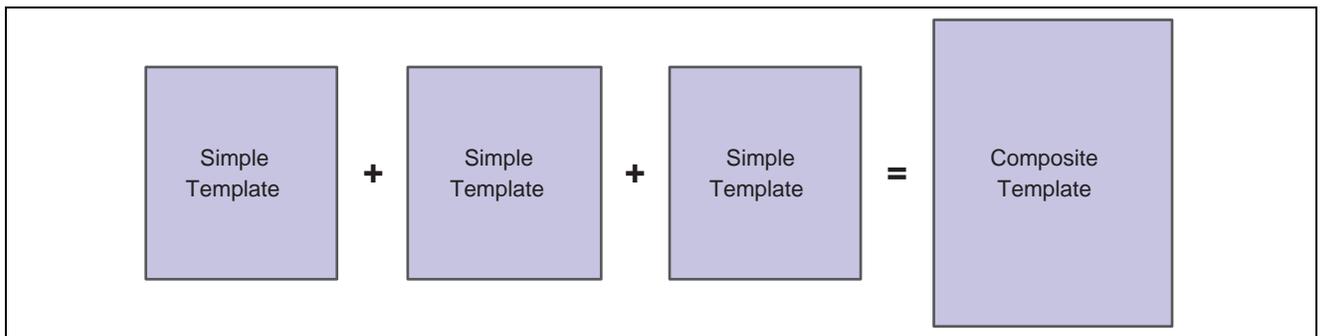
Understanding Composite Templates

After you create data sets, RTF documents and simple templates, you can create composite templates. A composite template is a group of simple templates that the system uses together to generate a proposal.

These equations illustrate simple and composite templates:

- Data Set + RTF Documents = Simple Template
- Simple Template + Simple Template + Simple Template = Composite Template

This graphic illustrates the creation of a composite template:



Composite template creation

You use simple templates to store small pieces of reusable information. For example, an organization sells bicycles and motorcycles. Though the proposals that you create for bicycles and motorcycles are similar, there are slight differences. To avoid recreating data that you can reuse, you can create simple templates to store generic information such as logos, headers and closings. You might create these simple templates:

- Company Logo
- Generic Header
- Generic Closing
- Bicycle Proposal Body
- Motorcycle Proposal Body

You can then use these simple templates in multiple composite templates. This table illustrates how you can reuse simple templates in multiple composite templates:

Composite Template	Simple Templates
Bicycle Sales Proposal	This composite template includes these simple templates: <ul style="list-style-type: none"> • Company Logo • Generic Header • Bicycle Proposal Body • Generic Closing
Motorcycle Sales Proposal	This composite template includes these simple templates: <ul style="list-style-type: none"> • Company Logo • Generic Header • Motorcycle Proposal Body • Generic Closing

After you create a composite template and change the status to Active, the system includes the template in the list of available templates the next time that you launch the Proposal Generation wizard.

Forms Used To Create Composite Templates

Form Name	FormID	Navigation	Usage
Proposal Generation Setup	W90CA242B	Sales Force Automation Setup menu (G90CA03), Proposal Generation Setup.	Access forms to add data sets, simple templates, and composite templates.
Search For Composite Templates	W980040G	Click the Step 3 - Composite Template Administration button on the Proposal Generation Setup form.	Add, modify, or delete composite templates.
Add Composite Template Header	W980040F	Click Add on Search For Composite Templates.	Add a composite template.
Composite Template - Manage <Composite Template Name>	W980040F	Select a record on the Search For Composite Templates form, or click Save and Continue on the Add Composite Template Header form.	View or modify a composite template.
Composite Template Details - <Composite Template Name>	W980040T	Select a record on the Search For Composite Templates form, and then select View Details from the Row menu.	Attach simple templates to a composite template.
Copy Mail Merge Composite Template	W980040F	Select a record on the Search For Composite Templates form, and then click Copy.	Copy a composite template.

Creating a 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 that 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 additional simple templates to the composite template.
6. On Work With Composite Template Details, enter sequence numbers for each of the simple templates that you selected for the 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.

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. Product code does not affect data processing. You use product codes to group templates.

Managing Proposal Templates

This section provides an overview of template management and discusses how to:

- Copying a simple or composite template.
- Modifying or deleting a simple template.
- Modifying or deleting a composite template.

Understanding Template Management

Although you have the option to modify or delete simple templates, keep in mind that modifying or deleting affects all composite templates that use those simple templates. For example, if you delete a simple template with a product image, the image will be unavailable in all composite templates that formerly included that image.

Similarly, if you modify a composite 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 composite template unmodified and instead create a new template that contains the modifications you have in mind.

You should also exercise caution when deleting a simple or composite template, because a deleted template becomes unavailable to all users.

If an existing composite template is reasonably close to the template that you want to create or contains a majority of the simple templates 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 that you could use as the basis for creating a summary template.

To modify or delete a template, use the same forms to create simple or composite templates.

Note. You use the Mail Merge and Doc Generation Maintenance Application program (P980040) to access templates that are used for mail merge and proposal generation. To successfully process mail merge data, you must create a version named *NA*. If you do not create this version, the system does not process mail merge information correctly.

Forms Used to Manage Templates

Form Name	FormID	Navigation	Usage
Mail Merge & Document Generation Administration	W980040O	Enter P980040 in the Fast Path field.	Access simple and composite templates.
Work With Composite Template Headers	W980040G	Click Composite Template Administration on the Mail Merge & Document Generation Administration form.	Copy or modify composite templates.
Work With Simple Template Headers	W980040C	Click Data Set Administration on the Mail Merge & Document Generation Administration form.	Copy or modify simple templates.

Copying a Simple or Composite Template

Access the Work with Simple Template Headers or Work with Composite Template Headers form.

- Find and select on the grid the template you want to copy.
Do not click the Select button.
- Click Copy.
- If you are copying a simple template, enter the template ID and template version for the new template that 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 that you are creating on Copy Mail Merge Simple Template.
- Click OK when you are finished copying the template.

Modifying or Deleting a Simple Template

Access the Work with Simple Template Headers form.

- On the grid, find and select the template that you want to modify.
Do not click the Select button.
- 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.
- To delete the template, select the template that you want to delete, and then click Delete.
- 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. On the grid, find and select the template that 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 the 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 the template that 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 proposal creation and discusses how to run the Proposal Generation Wizard.

Understanding Proposal Creation

The proposal generation feature uses a wizard that guides 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.

Complete these steps to generate a proposal:

1. Select the composite template.
2. Select the simple templates of the composite template to include in the generated proposal.
You can include some or all of the available simple templates.
3. Change the sequence of the simple templates, if necessary.
To include a simple template on a different area of the generated document, you can easily change the simple template's sequence.
4. Preview the generated proposal in PDF format.

This is exactly what the proposal will look like when you generate it in the system. You can use any available functionality of Adobe Acrobat when viewing the PDF file.

5. Confirm that you want to associate the generated proposal with the current sales order.

When you click Finish, the system stores the proposal as a media object. If you press Cancel, the system does not save the proposal.

Generated proposals are saved as media object attachments for quotes or sales orders, so you can view or print them at a later date.

To generate a proposal, you must first select a quote or sales order. You access the Proposal Generation Wizard from the Sales Order - Manage Existing Order form. This form is accessible from either of these Sales Order Entry programs:

- P4210
- P42101

See Also

PeopleSoft EnterpriseOne Sales Order Management 8.11 SP1 PeopleBook, “Entering Sales Orders”

PeopleSoft EnterpriseOne Sales Order Management 8.11 SP1 PeopleBook, “Entering Additional Orders,”
Entering Quote Orders

Forms Used to Create a Proposal

Form Name	FormID	Navigation	Usage
Sales Order - Manage Existing Order	W42101C	Daily Sales Force Automation Processing (G90CA01), Sales Order.	Access the proposal generation wizard.
Quote Order - Manage Existing Order	W42101C	Daily Sales Force Automation Processing (G90CA01), Quote.	Access the proposal generation wizard.
Proposal Generation Wizard	W90CA24B	On Sales Order - Manage Existing Order or Quote Order - Manage Existing Order, select a record and then select Order, Generate Proposal from the Row menu.	Run the proposal generation wizard.

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.

The system displays only active composite templates.

4. Click Next to continue.
5. For each 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 document appears in PDF format, click Finish to complete the proposal generation process.

When you click Finish, the system saves the PDF. If you click Cancel, the system does not save the PDF.

To make changes before finalizing the process, click Previous to return to the appropriate screen.

You can view the generated proposal from the Manage Existing Order form by selecting Order, Header Attachments from the Row menu.

(Rapid Start CAN and USA) Generating Proposals from Quotes

This section discusses:

- How to generate a proposal from a quote
- Preconfigured Processing Options for Canada and the United States Sales Order Entry - SQ Order Type (P42101)

Preconfigured Processing Options for Canada and the United Sales Order Entry - SQ Order Type (P4210)

Generating a Proposal from a Quote

This table lists the task for generating a proposal from a quote.

Task	Navigation	Program and Version
Generate proposal from quote.	Customer Relationship Management	P42101/RIS0003
	Quote	P4210/RIS0003
	Select Order, and then Generate Proposal from the Row menu.	

Data reports provide additional information about data that has been preconfigured for Rapid Start.

See *PeopleSoft EnterpriseOne Rapid Start Fundamentals 8.11 SP1 PeopleBook*, “(CAN and USA) Rapid Start Data Reports”.

Preconfigured Processing Options for Canada and the United States Sales Order Entry - SQ Order Type (P42101)

These processing options show the values that are preconfigured for version RIS0003.

Display

Processing Option Description	Value or Status
1. Display or Hide Cost Fields	blank
2. Display or Hide Price Fields	blank

Processing Option Description	Value or Status
3. Disable Pricing Related Fields	blank
4. Disable or Hide Status Codes	blank
5. Hide Closed Detail Lines	blank
6. Hide Credit Card Information	blank
7. Hide Freight and Carrier Information	blank
8. Hide Commission Information	blank
9. Hide Kit Components	blank

Order Inquiry

Processing Option Description	Value or Status
1. From Status	blank
2. To Status	blank
3. Search on Last or Next Status	blank
4. Date Range	blank
5. Display Text Lines	blank
6. Display Backordered/Canceled lines	blank
7. Customer Cross Reference Type	blank

Versions

Processing Option Description	Value or Status
1. Sales Order Model Version	RIS0003

Task Flow

Processing Option Description	Value or Status
Display Header or Detail	blank

Preconfigured Processing Options for Canada and the United Sales Order Entry - SQ Order Type (P4210)

These processing options show the values that are preconfigured for version RIS0003.

Defaults

Processing Option Description	Value or Status
1. Order Type (Required)	SQ
2. Line Type	blank
3. Beginning Status	500
4. Override Next Status	blank
5. Line Number Increment	1
6. Reason Code	blank
7. Override Transaction Unit of Measure	blank
8. Default Transaction Unit of Measure	1
9. Address Book Revisions	blank
10. Update Header to Detail	1
11. Header Branch/Plant	blank
12. Default Branch/Plant	blank
13. Order Template	blank
14. Customer Self Service Structure Type	blank
15. User ID default (CSS only)	blank
16. Override Sold To and Ship To Header (CSS only)	blank
17. Override Carrier Number (CSS only)	blank
18. Sold To Contact Record Type	blank
19. Ship To Contact Record Type	blank

Duplication

Processing Option Description	Value or Status
1. Order Type	SQ
2. Beginning Status	500
3. Next Status	blank
4. Copy Associated Text	2

Order Holds

Processing Option Description	Value or Status
1. Customer Credit Check	blank
2. Order Margin Check	blank
3. Order Line Margin Check	blank
4. Order Minimum Value Check	blank
5. Order Maximum Value Check	blank
6. Partial Order Hold	blank
7. Product Allocation Hold	blank
8. Authorization Hold for Prepayment Processing	blank
9. Settlement Hold for Prepayment Processing	blank
10. Order Process Hold	blank
11. Approval Hold	blank
12. Exclusive Adjustment Hold	blank
13. Inactive Customer Hold	blank
14. Inactive Customer Search Type	blank

Display

Processing Option Description	Value or Status
1. Display or Hide Cost Fields	blank
2. Display or Hide Price Fields	blank
3. Disable Pricing Related Fields	blank
4. Disable or Hide Status Codes	1
5. Hide Closed Detail Lines	blank
6. Hide Credit Card Information	1
7. Hide Freight and Carrier Information	blank
8. Hide Commission Information	1
9. Hide Kit Components	blank

Commitment

Processing Option Description	Value or Status
1. Activate Availability Checking	blank
2. Commit to Quantity 1 or Quantity 2	2
3. Display Supply and Demand Inquiry Form	blank
4. Enter Allowed Lot Status Group to validate	blank

Currency

Processing Option Description	Value or Status
1. Tolerance Limit	0
As-If Currency Display	blank
2. Currency Code	blank
3. "As Of" Date	blank

Process

Processing Option Description	Value or Status
1. Status Code Limit for Changes	999
2. Subsystem Processing 1	blank
3. Display Header or Detail	blank
4. Auto Order Repricing	blank
5. Display Before Accept Prompt	1
6. Order Template Processing	blank
7. Blanket/Quote Order Processing	blank
8. Agreement Processing	blank
9. Customer Self-Service Functionality	blank
10. Cost or Base Price Markup	blank
11. Ship and Debit Processing	blank
12. Issue Warning for Default Free Good	blank
13. Adjust Accumulated Values in the Volume Transaction	blank

Processing Option Description	Value or Status
14. Prompt for Customer Segment Items	blank
15. Display Warning/Error for Ascending Date Rule Check	blank
16. Default Selection for Multiple Blanket Orders	blank
17. Default Selection for Single Blanket Orders	blank

Cross Ref

Processing Option Description	Value or Status
1. Substitute Items	S
2. Complementary Items	A
3. Replacement Items	R
4. Pricing for Substitute Items	blank
5. Promotional Items	blank

Versions

Processing Option Description	Value or Status
1. Pick Slip Print Subsystem (R42520)	blank
2. Supply and Demand Inquiry (P4021)	RIS0004
3. Pick Slip Print On Demand (R42520) from Customer Service Inquiry	blank
4. Adv Order/Basket Reprice (R42750)	blank
5. Online Invoice Inquiry (P42230)	RIS0001
6. Preference Profile (R40400)	blank
7. Check Price and Availability (P41261)	blank
8. Purchase Order Entry (P4310)	RIS0001
9. Sales Ledger Inquiry (P42025)	RIS0001
10. Bill of Material Inquiry (P30200)	RIS0001
11. Work Order Entry (P48013)	RIS0002
12. Print Invoice (R42565)	blank
13. Online/Subsystem Commitment (R42997)	RIS0001

Processing Option Description	Value or Status
14. Configured Items (P3210)	blank
15. Sales Order Batch Transaction Editor (R4210Z)	blank
16. Credit Check (P42050)	RIS0001
17. Work with Shipments (P4915)	blank
18. Customer Master (P03013)	RIS0001
19. Ship and Debit (R45100)	blank
20. Apply Volume Level Adjustment (R45900)	blank
21. Automatic Document Generation (P00391)	blank
22. Customer Segment Items (P42440)	blank
23. Product Variants (P41902)	blank
24. Order Processing (R31410)	blank
25. Product Catalog (P90CA106)	blank

Preference

Processing Option Description	Value or Status
1. Preference Profile Processing	blank
2. Inventory Commitment Preference	blank
3. Override Schedule For Advanced Preferences	blank

Transfers

Processing Option Description	Value or Status
1. Activate Transfer Order Entry	blank
2. Sales and Purchase Order Taxable	blank
3. Mandatory Landed Cost	blank

Order Inquiry

Processing Option Description	Value or Status
1. From Status	500
2. To Status	999

Processing Option Description	Value or Status
3. Search on Last or Next Status	blank
4. Date Range	blank
5. Display Text Lines	1
6. Display Backordered/Canceled lines	3
7. Customer Cross Reference Type	C

Warehouse

Processing Option Description	Value or Status
1. Request Processing Mode	blank
2. Subsystem Print Pick Request	blank
3. Override Next Status	blank

Store & Fwd

Processing Option Description	Value or Status
1. Mode	blank

Workflow

Processing Option Description	Value or Status
1. E-mail Work Order Planner	blank
2. Sales Order Entry Workflow	blank

Multiples

Processing Option Description	Value or Status
1. Multiple Schedule	blank
2. Schedule Line (Future)	blank

Interbranch

Processing Option Description	Value or Status
1. Intercompany Invoice	blank
2. Interbranch Order Types	blank

Interop

Processing Option Description	Value or Status
1. Transaction Type	blank
2. Before/After Image Processing	blank

Prepayment

Processing Option Description	Value or Status
1. Prepayment Processing	blank
2. Process Authorization	blank
3. Process Settlement	blank
4. Authorize Prepayment Transaction version	blank
5. Settle Prepayment Transaction version	blank
Enter a Next Status Override Code for:	blank
6. Authorized lines	blank
7. Settled lines	blank

Audit Log

Processing Option Description	Value or Status
1. Use Audit Log for Sales Order Changes	blank
2. Reason Code required for Sales Order Changes	blank
3. Approval process required for Sales Order changes	blank

Volume UpSell

Processing Option Description	Value or Status
1. Alert for Volume Based Up-Sell within Tolerance	0

Profit Margin

Processing Option Description	Value or Status
1. Enable Gross Profit Margin Pricing	blank
2. Adjustment Reason Code for Overrides	blank
3. Resolve and Test Target Gross Profit Percentage	blank

Promotion ID

Processing Option Description	Value or Status
1. Default Promotion ID	blank

Order Promising

Processing Option Description	Value or Status
1. Order Promising	blank

Matrix

Processing Option Description	Value or Status
1. Inventory Parent	blank

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 relational 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	<p>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.</p> <p>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.</p>
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	<p>A process of transferring records from a third-party system to PeopleSoft EnterpriseOne.</p> <p>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.</p>
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	<p>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.</p> <p>See also direct connect and store-and-forward.</p>
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 <i>business unit</i> .
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 table.
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 than 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.
<i>nota fiscal</i>	In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.
<i>nota fiscal factura</i>	In Brazil, a nota fiscal with invoice information. See also <i>nota fiscal</i> .

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	<p>The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path):</p> <p>11>21>26>28>38>01</p> <p>In this path, <i>11</i> equals new project pending review, <i>21</i> equals programming, <i>26</i> equals QA test/review, <i>28</i> equals QA test/review complete, <i>38</i> equals in production, <i>01</i> 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.</p>
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	<p>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.</p> <p>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 EnterpriseOne systems.</p>
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.

workbench	A program that enables users to access a group of related programs from a single entry point. Typically, the programs that you access from a workbench are used to complete a large business process. For example, you use the EnterpriseOne Payroll Cycle Workbench (P07210) to access all of the programs that the system uses to process payroll, print payments, create payroll reports, create journal entries, and update payroll history. Examples of PeopleSoft EnterpriseOne workbenches include Service Management Workbench (P90CD020), Line Scheduling Workbench (P3153), Planning Workbench (P13700), Auditor's Workbench (P09E115), and Payroll Cycle Workbench.
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. Z tables also can be used to retrieve PeopleSoft EnterpriseOne data. Z 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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